2022

UCAS FRESHERS REPORT

Student spends and trends 2022

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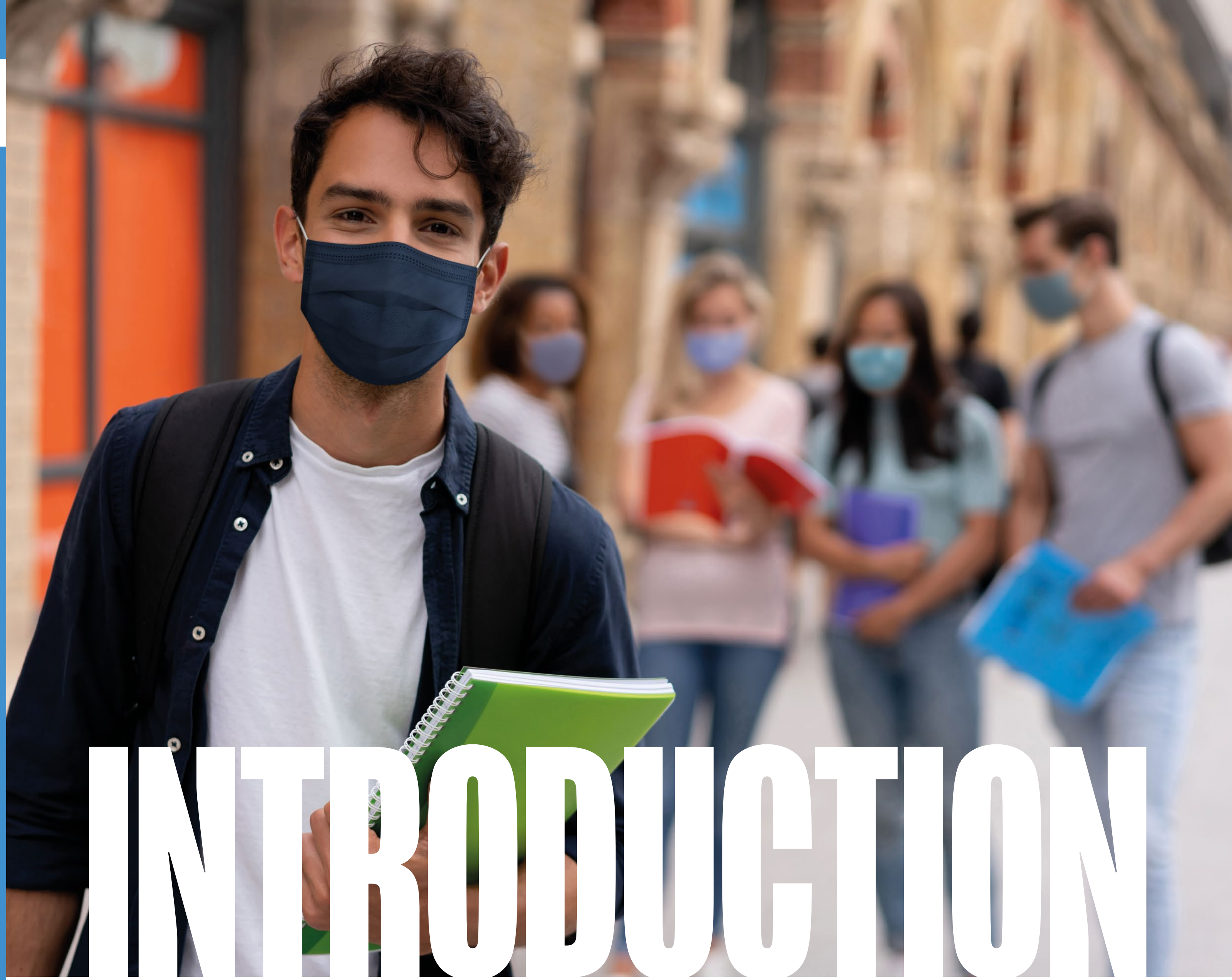
Methodology

We sent 3 surveys to students beginning their first year of higher education in the UK, collecting responses between 28 October and 11 November 2021. In total, 7,296 first year students completed the surveys, giving us a wealth of rich data from which to draw the following insights about behaviours and trends amongst current freshers across the UK.

Before we start our calculations, we adjust for imbalances in response rates across applicant groups to ensure that the results are truly representative of the student population.



INTRODUCTION

Welcome to the UCAS Freshers Report 2022

Each year we release the results of a series of surveys which profile thousands of new students on their lifestyle, spending, and consumer behaviours. And while we may be analysing a year significantly interrupted by the effects of COVID-19 – you may be surprised by some of the results...

Today's student is strong – by nature and by nurture. The pandemic has built a new strength in a generation already characterised by its resilience, mental health awareness, and steadfast moral compass. These are traits that directly influence the concerns of this report: spending, brand loyalty, technology, social media use, and travel. And if there was ever a time when personal values were put aside for the sake of a bargain or convenience, that time is up – at least for the Gen Z fresher.

In the UK, 2021 was a sputtering stop-start of a year. Of vaccines, boosters, the lifting of restrictions, the temporary reinstatements, and universities trying to bring back the student experience that so many young people have dreamt of.

So much has changed – some of it for now, some of it forever. Each year, even before COVID, we repeatedly see that optimism and stoicism are endemic to the student psyche. So while the pandemic has been a trying time for all, students are likely to find the positive changes and make them part of their new normal.

Each action has driven a reaction – some predictable and some entirely surprising. Today's fresher, the Gen Z consumer moulded by the impact of a global pandemic, is like no other shopper to come before.

Let's take a look at why.

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THE 2022 STUDENT:

NEW SHOPPERS, NEW VALUES, NEW RULES

The ambitious youth and retail therapy are in cahoots.

They always have been, but Instagram has created a new culture of glitzy moments, where young people channel Kardashian lifestyles in miniature – all for a carefully curated grid photo. Check #luxury and #luxurylifestyle and you'll find 200 million posts, compared to just 7 million for the top ten #cheap hashtags combined.

But things are slowly changing.

This pursuit of more, which has characterised youth culture for a decade, is seeing its veneer chipped away at by the arrival of Gen Z shoppers. They view life through a new lens. **Today's youth value individual expression and ethical decision-making**[1].

Not very Kardashian, you might say.

Today's fresher is part of this generational cohort (one which will dominate undergraduate populations until the early 2030s) and glitz is not one of their chief characteristics. You're more likely to bump into a Gen Z fresher in the budget aisle or charity shop, than amongst the designer rails.

But that's not because they're hard-up or miserly. **They just think differently about spending than previous generations**.

ALDI and LIDL are the joint-second (37%) most frequented supermarkets for students this year, with both retailers having enjoyed a rise in popularity (both climbing back into the top 20 overall brands) during a year where all their rivals were stuck in neutral. The traditional market leader Tesco has seen its share fall from 72% to 58% – between 2017 and 2021. **Despite shopping cheaper, freshers are still spending more on groceries than last year. Value – not cost**.

Vinted, the app for buying and selling used clothes, is in the top 5 new brand discoveries for freshers since the start of the pandemic – while eBay also breaks into the top 20 most popular brands for the first time ever. The preloved and upcycling movements behind the success of these retailers are endemic to the Gen Z consumer, almost half of whom[2] are now shopping second-hand. **Thrifting helps them to express their individuality, save money, and protect the environment**.

This strive for affordable responsibility also fires a passion for independent stores, which are some of the most popular 'new discoveries' for this year's students. The independent retailer's perceived freedom from corporate rules, and connection with the community, must have direct lines into the Gen Z psyche.

[1] www.mckinsey.com/industries/consumer-packaged-goods/our-insights/true-gen-generation-z-and-its-implications-for-companies

[2] www.refinery29.com/en-gb/2020/10/10135164/thrifting-gen-z-thrift-shopping-trend

Figure 1:
Where freshers buy groceries while at uni

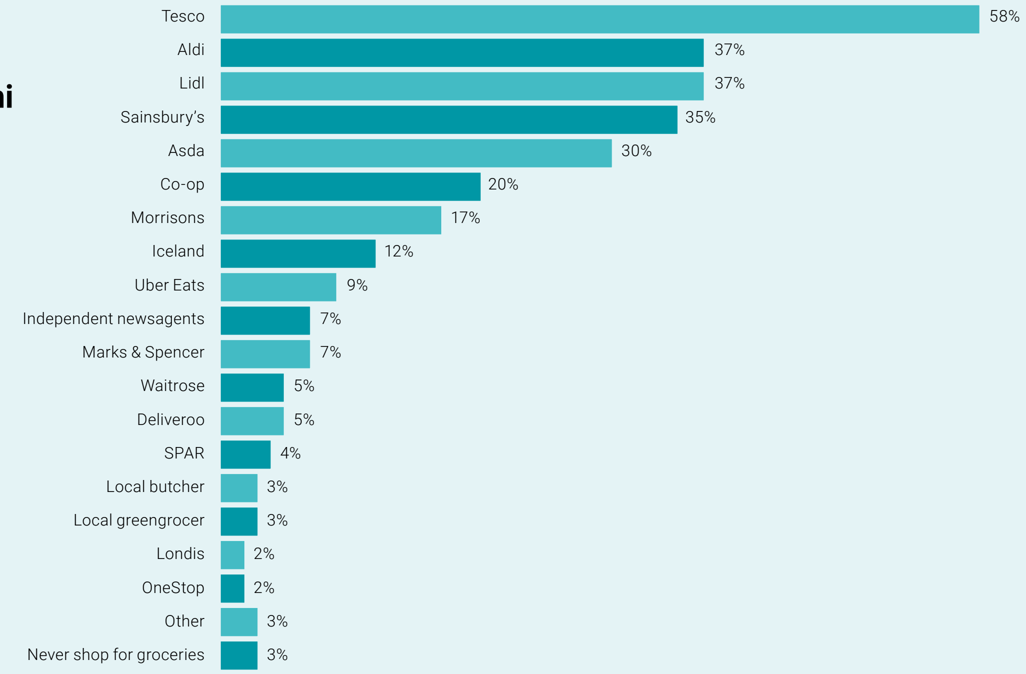

Figure 2:
Freshers' favourite brands

1. amazon
2.
3.
4. asos
5. PRIMARK
6. adidas
7. H&M
8. TESCO
9. ZARA
10. PRETTYLITTLETHING
11. SAMSUNG
12. Waterstones
13. URBAN OUTFITTERS
14. ebay
15. ALDI
16. LIDL
17. ASDA
18. NEW LOOK / SHEIN
19. boohoo / Boots
20. SONY

Figure 3:
Freshers' favourite brands by gender

Top 10 brands for female students:

1. amazon
2. Apple
3. Nike
4. asos
5. PRIMARK
6. H&M
7. ZARA
8. PRETTYLITTLETHING
9. TESCO
10. adidas

Top 10 brands for male students:

1. Nike
2. Apple
3. amazon
4. adidas
5. TESCO
6. SAMSUNG
7. asos
8. SONY
9. PRIMARK
10. Microsoft

But while indie stores don't always come cheaper, that's not the point for this year's freshers. They're not unwilling to spend – they're just looking to spend their money in the right places and in the right way. In fact their spending is the highest it's ever been: for pre-university purchases, freshers' week buys, and shopping throughout the term. **This year's freshers are favouring quality products (76%) at reasonable costs (64%)**. This applies as equally to value supermarkets as it does to vintage clothing buys and independent retailers – which sell handmade and local.

So what does this mean for brands looking to target this next generation of students?

It's a new rulebook for 2022 for so many reasons. But it's not that the Gen Z fresher's pursuit of less means that they don't care about image anymore, rather that the image has changed. It's now one of responsibility, authenticity, environmentalism, financial care, and ethics. **They spend with their hearts on their sleeve, and they want their brands to show the same openness**.

Otherwise they'll vote with their feet.

Figure 4:
Freshers' top pandemic brand discoveries

1. SHEIN
2. asos
3. Small/independent brands
4. The Ordinary. | Bershka
5. Vinted | ZARA

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SOME THINGS ARE JUST BETTER IRL

Long before Facebook became Meta, the metaverse (a simulated digital environment we all partially live in) was already a big part of everyday life. Specifically for younger audiences, things like gaming, virtual/augmented reality, digital economies (think crypto), and messengers – were all harbingers of the metaverse.

Which is why terms like IRL (in real life) needed creating – to specify whether we're talking about something that happened in cyberspace or, well, IRL.

And the knock-on for consumer behaviour has been profound. For today's freshers, the digital shopping experience is almost all they've ever known – click and collect, 24h delivery, 15m drop-off. Deliveroo. Netflix. Prime.

While Millennials adopted semi-robotic lifestyles with open arms, Gen Z are craving a little more intimacy. In the age of one-click checkouts and deliver-to-door subscriptions, this year's freshers are returning to the analogue world in force. Take books – in a world of Kindle and Amazon Prime – half of all students are still using libraries,and at least 16% bought in-store. Or groceries – where Deliveroo drop-offs and online ordering haven't stopped ALDI and LIDL returning to the top 20 brands (see figure 2), despite not being known for their digital offers. **91% of students shop at supermarkets in-person, while less than a fifth use online deliveries**.

Time spent online overall is also falling for the first time in years – including social media, streaming, and online shopping. Whether this is a reaction to COVID restrictions being lifted, another symptom of Gen Z's reach for authenticity, or a reflection of less online learning – the bucking of a year-on-year trend certainly suggests that things are changing.

This semi-post-COVID world also presents challenges in its transition. It may not be a perfect scenario for the 51% of students who say that half of their lectures remain virtual, but it's certainly better than the first year of the pandemic when they lost nearly a third[1] of their entire learning time. Though the desire to get back to real life experiences is tempered by the fact that it could reverse the progress made so far in getting back to normal.

But that desire is real and true – not only for academic experiences but commercial too. **Gen Z want to engage with[2] brands which are connecting with audiences through real-life interactions**. And almost 90%[3] want their engagement to include physical as well as digital.

So for the retailers looking to connect meaningfully with undergraduates, the acceleration towards digital experiences may yet merit a closer look…

[1] www.bbc.co.uk/news/explainers-52753913
[2] www.inphantry.com/generation-z-craves-experiential-marketing-heres-why/
[3] https://yougov.co.uk/topics/resources/articles-reports/2019/07/26/88-gen-z-want-brand-experiences-delivered-through-

Figure 5:
How freshers get uni textbooks

Figure 6:
How freshers get groceries while at uni

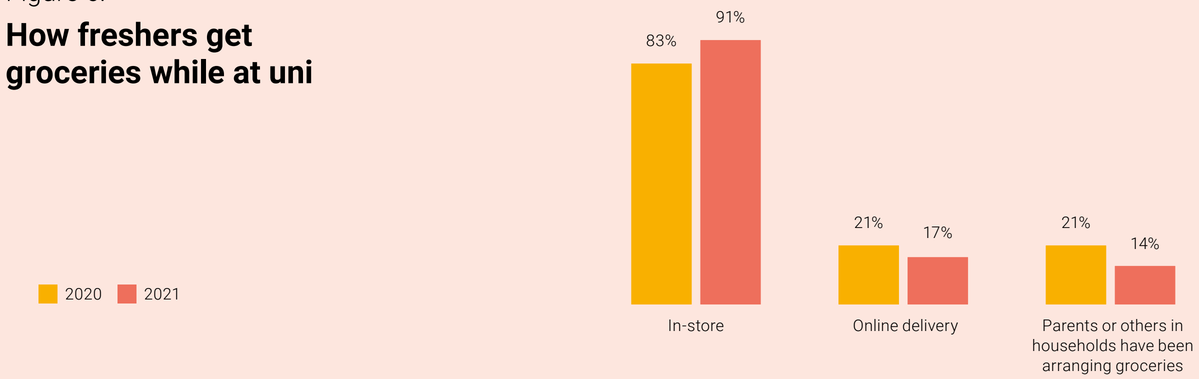
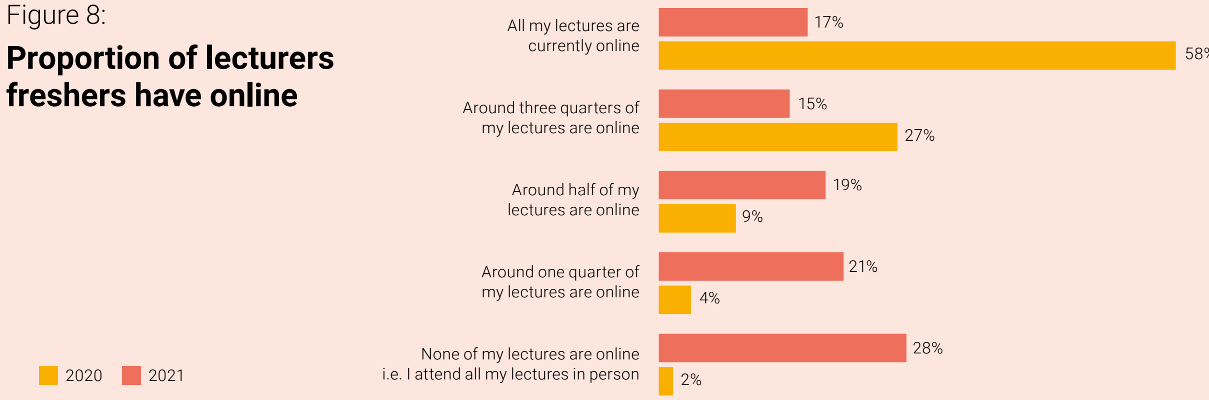


Figure 7:
Average time freshers spend online each day, 2019-2021

Figure 8:
Proportion of lecturers freshers have online



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BIG SP£NDERS
WITH NEW WAYS TO SPEND

For the third consecutive year, amidst a pandemic which has repeatedly closed shops, bars, and nightclubs – UK students have increased their spending once again.

- In freshers' week 2019, they spent £368. In 2020, £406. In 2021, £421.
- In a typical week in 2019, they spent £214. In 2020, £229. In 2021, £235.

That's a 12% average increase in expenditure, over a period of time where the average inflation was only 1.61%[1] per year. Seemingly immune to the impacts that COVID is having on many people's purses, students are letting their wallets loose regardless.

Two-thirds of students invested in kitchenware and homeware before arriving at university. These are numbers we've never seen before for these categories (see figure 14). Both were on the steady decline year-on-year, before 2021 when they shot up by nearly 10% each. Why the sudden jump? Maybe the risk aversion of Gen Z and a lessening inclination for nights out and drinking is behind a more homely mentality.

Although… alcohol expenditure has also experienced significant growth. Last year, freshers spent an average of £52 during their first week – this year it rose by almost 20%. And even once term begins, 2021's students are still spending 8% more on booze than their predecessors. Is this another symptom of isolation – a rebellion and a release from the restraints of lockdown? After all, freshers' week last year was only enjoyed against the backdrop of 10pm curfews and the Rule of Six…

But 2021's students are far from drinking and eating machines just making up for lost time. They're also eating home-cooked meals almost every day (80%), carrying out large sensible grocery trips during their first week (76% – up 9% from 2020), and paying their own way (without familial help) more than before.

Gen Z students (AKA 'Generation Savvy') are far more fiscally mature and risk averse than Millennials were. This year's student has access to the tools[2] (peer-to-peer payments, crypto, challenger banking) and the nous[3] (side hustles, saving-over-credit, financially-driven choices) that their predecessors didn't. Many were first exposed to the economy at a time when belts were being tightened – which has left its mark. Half of all 18- to 22-year-olds in the US are now freelancing,[4] and Gen Z were the only generational cohort that spent less on Amazon in 2020. Literally everybody else in the world spent more.[5]

And while finances are still a chief challenge for many students – e.g. the UK's Maintenance Loan falls £340 short[6] of covering the average living costs – fewer are asking their parents for money or getting a part-time job. Generation Savvy are taking advantage of crypto, NFTs, and the gig economy – to continue spending as they like without exposing themselves to the risks of their predecessors.

With alternative earning methods, brands are going to need alternative messaging. There are no more 'banks of mum & dad' or 'payday deals' when your customers are freelancing and investing.

[1] www.statista.com/statistics/270384/inflation-rate-in-the-united-kingdom/
[2] https://www.forbes.com/sites/forbesbusinesscouncil/2021/01/21/gen-z-and-the-future-of-spend-what-we-know-about-this-generation-the-pandemic-and-how-they-pay/?sh=6b49424121eb
[3] www.genzinsights.com/when-it-comes-to-money-we-should-all-act-more-like-gen-z
[4] https://influencermarketinghub.com/gen-z-spending-habits-stats/#toc-3
[5] https://influencermarketinghub.com/gen-z-spending-habits-stats/#toc-7
[6] https://www.savethestudent.org/money/student-budgeting/what-do-students-spend-their-money-on.html

Figure 9: **Freshers' week spend vs. a typical week at uni**

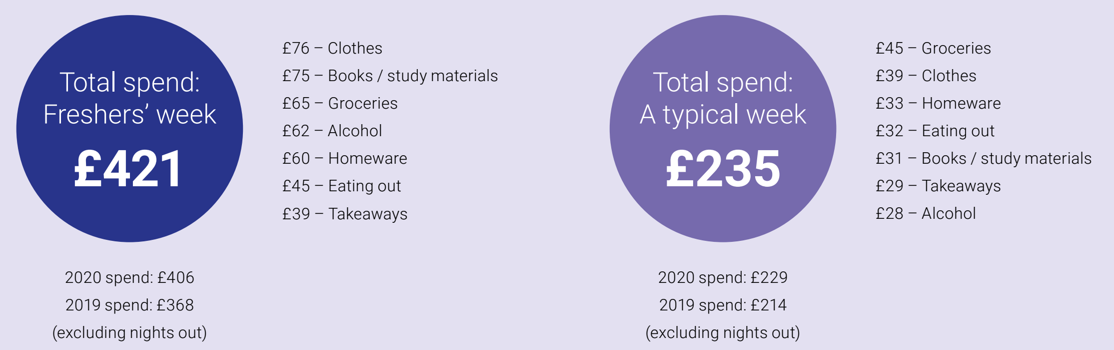


Figure 10: **Freshers' pre-uni spending, 2019-2021**

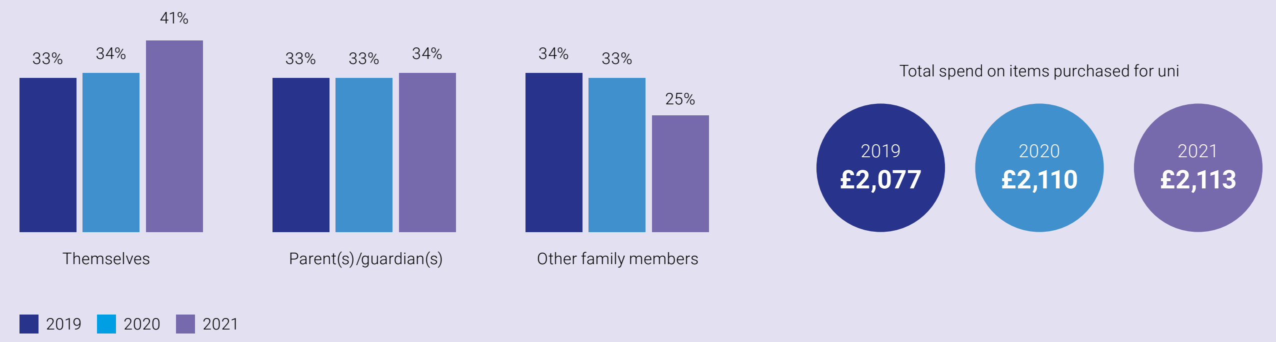


Figure 11: **Freshers' activities in a typical week at uni**

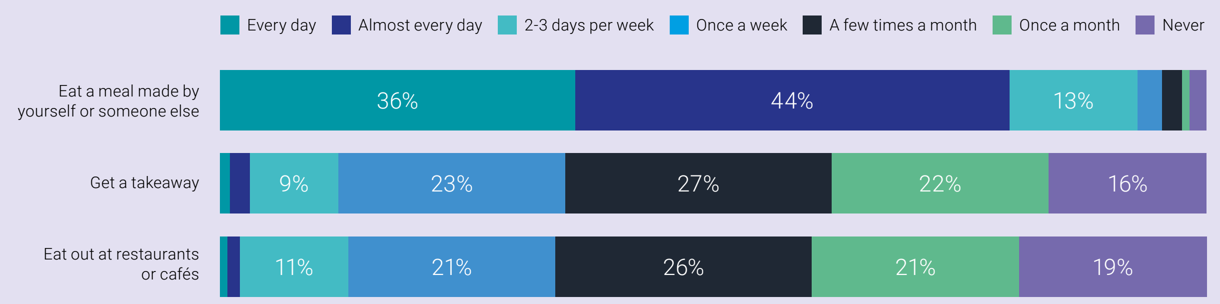
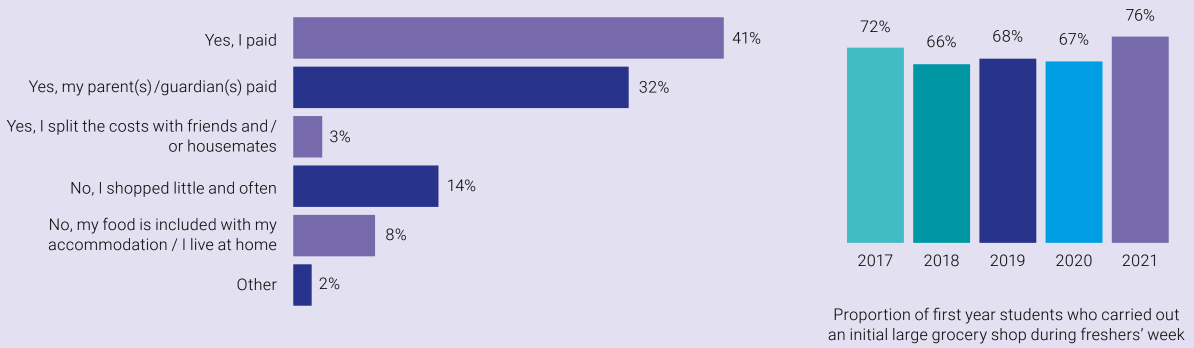


Figure 12: **Students who did a big initial grocery shop in freshers' week**



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NESTING, HYGGE,

AND A SLOWER, HEALTHIER LIFE

If there was any indication that student behaviours are changing, it's the performance of one of this year's fastest rising popular brands.

Dunelm – the home furnishings powerhouse – rose 142 places to break into the top 100 most popular student brands. Perhaps unsurprising, now having seen that kitchenware and homeware are some of the most common pre-university investments (+10% on 2020). But when Dunelm is rubbing shoulders with perennial favourites like KFC and Deliveroo – there can be no doubt that change is coming.

It goes without saying for most that the pandemic has introduced a slower pace of life. For those getting ready to start university, it would have been an even more pronounced culture shock. No celebrating exam results, no summer holidays, no farewell parties as they pack up and leave their hometowns. You would be forgiven for thinking that they'd have resisted these changes with all of their might.

But you don't have to look far to find a slower life being welcomed with open arms – even among Gen Z. Check Instagram for the 3.5 million posts tagged #theartofslowliving, or TikTok for 2 million views on #nesting videos. And type 'how to maintain a slower...' into Google and it'll finish it for you – '...slower pace of life after lockdown.' Plus 5 million answers.

But how do Gen Z characteristics align with the impacts of COVID, to explain why they are embracing such a big change to their lives?

1. **Gen Z are financially careful and prefer to save, rather than rely on credit.**
   – During COVID, many people saved almost 30%[1] of their disposable income.
2. **Gen Z are more entrepreneurial than their predecessors.**
   – During COVID, 30% more[2] start-ups were registered than before.
3. **Gen Z appear to be the most affected[3] by anxiety.**
   – During COVID, many people developed resilience[4] and resistance to stress.

The ability to save money, start businesses, and look after their mental health reads like a recipe book written specifically for the 2021 student.

Figure 13:

Freshers' favourite brands – biggest changes, 2020-2021

Brands with 10 most positive changes in position:

- +149 (ranked =77) JUST EAT
- +142 (=100) Dunelm
- +126 (=100) Dickies
- +107 (=100 & =100) KFC, deliveroo
- +94 (=51) Spotify
- +93 (=93) Charlotte Tilbury
- +71 (=63) COSTA
- +55 (=100) new balance
- +54 (=60) CORSAIR
- +52 (=82 & =93) Coca-Cola, GAME

Brands with 10 most negative changes in position:

- -72 (=82) TOPSHOP
- -40 (=100) Paperchase
- -27 (76) PlayStation
- -25 (=100) ASUS
- -22 (=93 & =82) The Ordinary., ARMANI
- -20 (=71 & 43) GUCCI, TOMMY HILFIGER
- -17 (=77, 50, =45) HUGO BOSS, IKEA, MISSGUIDED
- -15 (=60 & 35) RALPH LAUREN, JD
- -14 (=93, 33, =31) JACK WILLS, hp, VANS
- -13 (=71 & =38) Currys, PC World, RIVER ISLAND

Figure 14:

Freshers' pre-uni purchases, 2018-2021

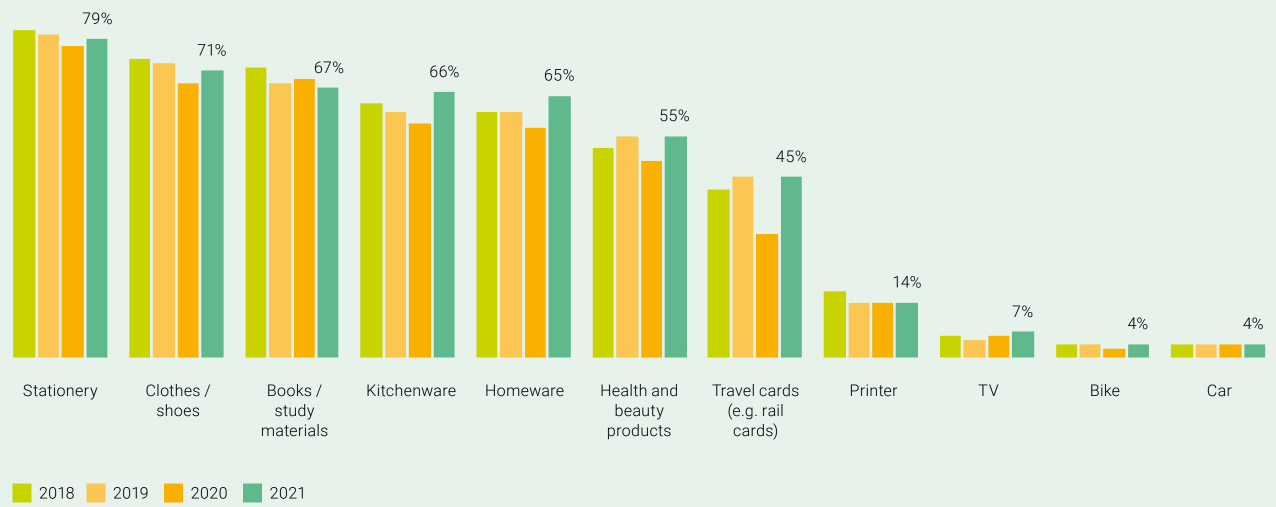
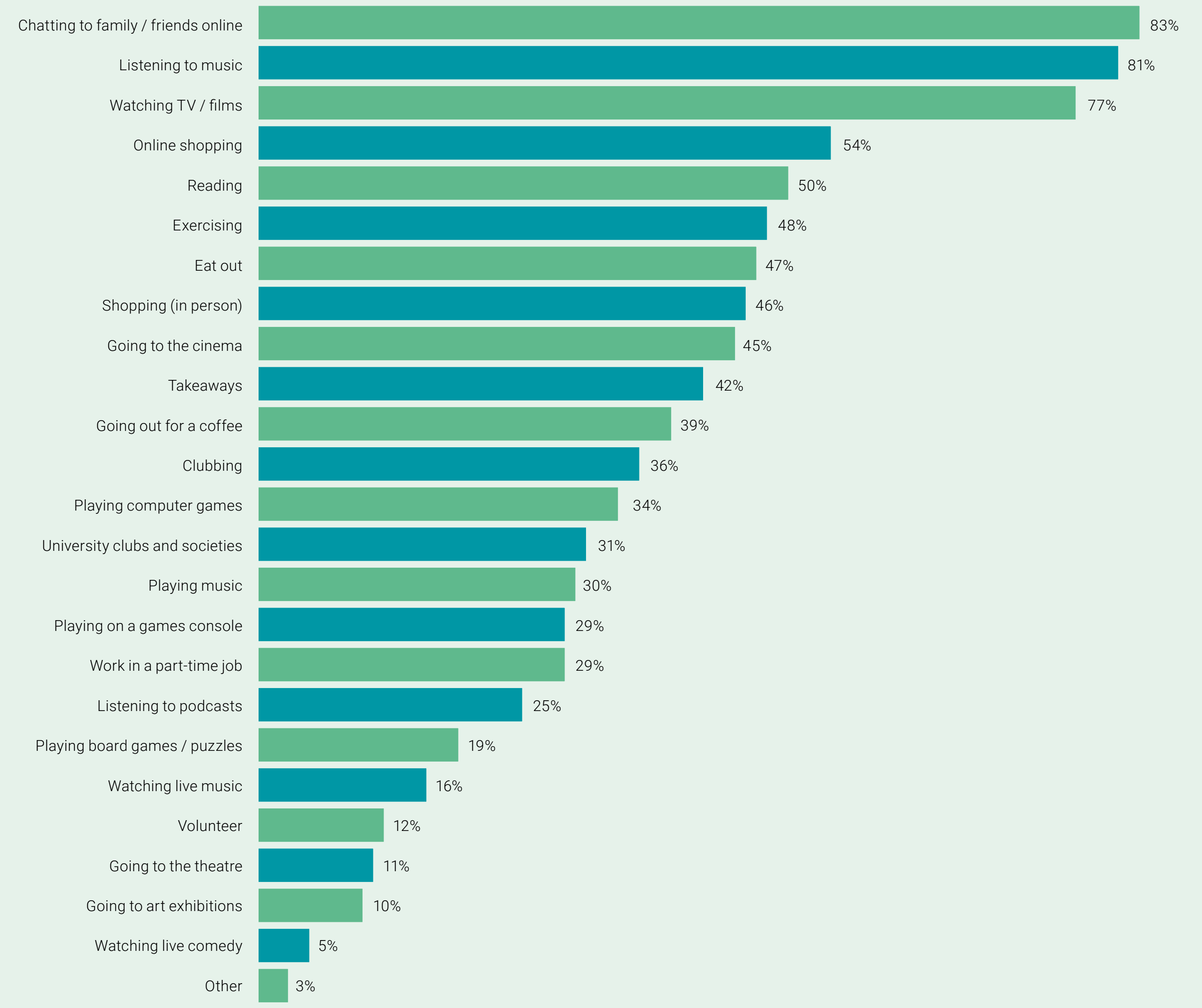


Figure 15:

What freshers do in their spare time



COVID also appears to have sharpened the appreciation of this year's freshers in what matters most to us as individuals. Chatting with family and friends online has risen by 15% to the most popular way for freshers to spend their spare time. The traditional big social activities – like eating out or societies/clubs – are yet to return to their pre-pandemic levels of popularity. For now, it's all about family, friends, health, and shared experiences.

Even big tech tapped into this behavioural change, with Amazon, Facebook, and Twitch offering 'watch parties' during the pandemic – giving people the ability to enjoy films and shows with their loved ones – remotely.

All this 'slow living' talk is a reminder of the worldwide Hygge boom in 2016 – the Danish concept of cosiness and contentment. It was a big deal for a while (Dunelm probably agrees) but a few years later, it had all but disappeared as a trend. That is until it spiked again during the pandemic winters. You'll also see booms for 'mindfulness' in January 2020, and 'nesting' in May 2020 and April 2021.

At the time of writing, many aspects of UK life are back to something that resembles the pre-pandemic world. But new student habits have already embedded themselves – like spending bigger on interiors, eating at home, spending more on groceries, and socialising remotely with their loved ones. **Students aren't yet ready to let go of the slower pace of life that they've adopted**. And this will impact the way that brands must engage with them. Even the most youthful of retailers will need to revise their communications, content, and creative.

[1] www.thisismoney.co.uk/money/saving/article-9122813/Britain-predicted-saving-record-sums-lockdown.html

[2] www.ft.com/content/3cbb0bcd-d7dc-47bb-97d8-e31fe80398fb

[3] www.aecf.org/blog/generation-z-and-mental-health

[4] www.mentalhealth.org.uk/coronavirus/resilience-across-uk-coronavirus-pandemic

BLACK FRIDAY, SINGLES' DAY, AND THE AMAZON EXPLOSION

Black Friday has been the king of sales since ecommerce boomed in the late 90s and early 00s. It's been especially popular with students, and the wider youth generation – a trend that continues throughout COVID with three quarters of students telling us they were going to shop Black Friday 2021.

But only two years ago it was January and Boxing Day sales which were the main challengers to the Black Friday crown. Now Amazon Prime Day has climbed over them, clawing its way to second place through an 11% growth spurt since 2018. Things aren't close enough to consider it a real contender for the top spot yet, but Prime Day is only one small piece of the puzzle in Amazon's incredible pandemic boom.

Amazon is the most popular brand for freshers. That's up from 4th in 2020, 9th in 2019, and 15th in 2018 – despite Gen-Z as a whole spending less on the site. Amazon is also the brand that students would miss most if it disappeared. It's where almost two thirds of students get their textbooks from, which is 3x the amount of its nearest competitor. Amazon Prime Video has climbed 32% in popularity in 5 years, second only to Netflix. And 43% of students planned to shop on Amazon Prime Day 2021.

Amazon's USPs – convenience, rapid delivery, remote access – made it the perfect pandemic company. And, for the same reason, the perfect Gen Z company – despite being far from meeting their preferences for independent or local. Regardless, profits have tripled[1] since COVID arrived.

But let's, for a moment, look at what's coming over the hill. Because: it is huge.

'Singles' Day started in China as a sort of 'anti-Valentine's Day', and is now the world's largest shopping event. Yes – largest. By an incredible distance too. It's 4x bigger than either Black Friday or Cyber Monday. Nicole Kidman, Taylor Swift, and Katy Perry have all represented the event. Alibaba, the Chinese e-commerce giant (but only one of many retailers taking part in the event), posted sales of £62bn[2] for 2021 Singles' Day. That's 5x more[3] than the entire US spent on Amazon Prime Day in the same year.

And despite its low profile in the UK, there are several reasons why it's likely to become a key retail experience for students. Firstly, its 2021 rendition (it takes place on 11 November and is also known as 11:11) focused heavily on sustainability, inclusiveness[1] and rational spending[2] – all Gen Z characteristics. 2021's Singles' Day also featured breakthroughs for smaller, local brands – and Gen Z do love to shop small.

One of the biggest current players of Singles' Day, JD.com, reported that sales to Gen Z shoppers tripled[3] compared to last year. Plus ASOS, Waitrose, and M&S all got involved in 2021. It feels like only a matter of time before it arrives on UK shores – and all signs point to widespread Gen Z adoption.

[1] www.bbc.co.uk/news/business-56937428
[2] www.businessinsider.com/alibaba-singles-day-record-sales-84-billion-toned-down-2021-11?r=US&IR=T
[3] www.techradar.com/uk/amazon-prime-day/new-prime-day-deals
[4] https://radiichina.com/alibaba-2021-double-11/
[5] www.thedrum.com/opinion/2021/11/24/singles-day-the-uk-what-brands-can-learn-and-look-forward-2022
[6] www.chinadaily.com.cn/a/202111/12/WS618dc038a310cdd39bc74ea9.html

Figure 16: **Sales events freshers have shopped in, 2018-2021**

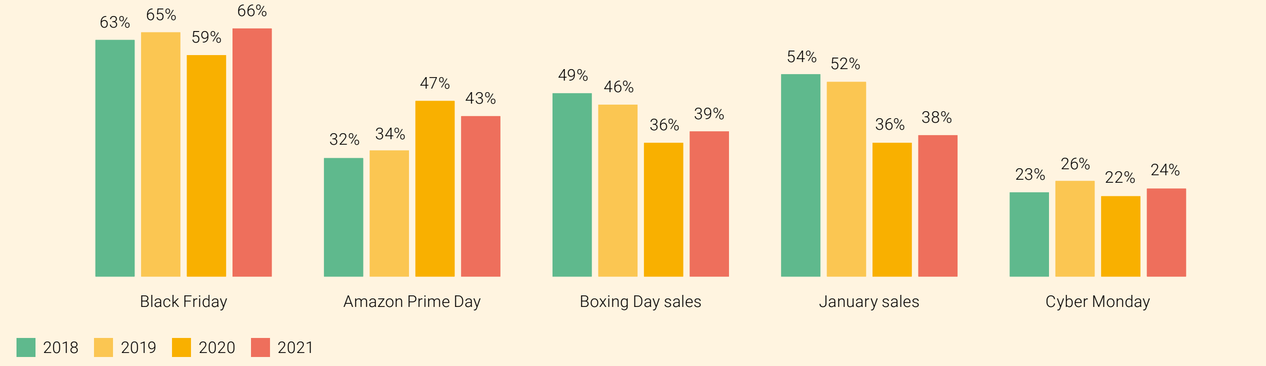


Figure 17: **The brand freshers would miss most if it no longer existed**

1. amazon
2.
3.
4. PRIMARK
5. asos
6. H&M
7. ZARA
8. PRETTYLITTLETHING
9. TESCO
10. SAMSUNG

Figure 18: **Where freshers purchase textbooks**

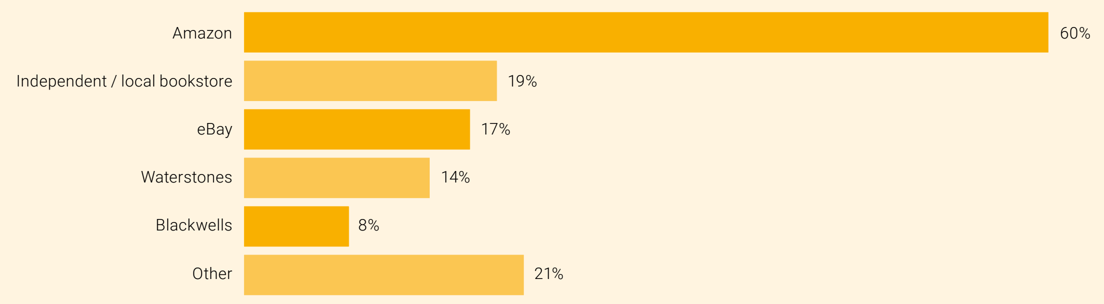
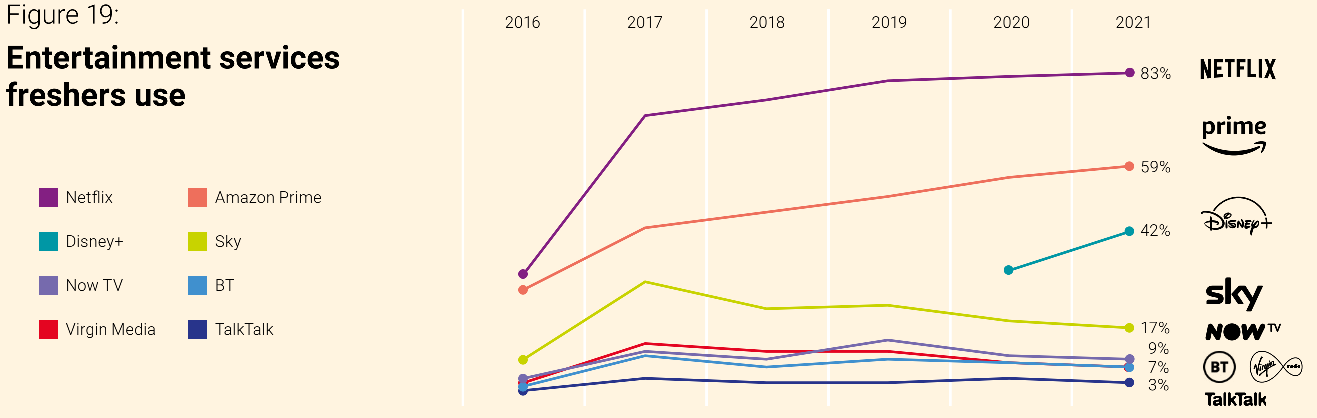


Figure 19:
Entertainment services freshers use



INDEPENDENT MINDS, INDEPENDENT FINDS

Indie. Boutique. Local. Small. Artisan. Small batch. Limited run.

There's a growing trend to favour smaller or independent brands and retailers. It's a particularly popular movement among younger shoppers like Gen Z. This socially-conscious and sympathetic[1] group seeks to shop with a purpose and support local communities.

[1] https://qz.com/2050533/how-small-businesses-can-reach-gen-z-customers/

[2] www.etsy.com/market/female_owned

[3] www.fairplaytalks.com/2020/12/22/gen-z-plan-to-buy-gifts-from-small-firms-brands-that-support-blm/

And when we asked freshers what matters most in the brands they engage with, the most interesting points were what they told us mattered least:

- 4th from bottom: how long the brand's been around (14%)
- 3rd from bottom: their advertising and marketing (7%)
- Rock bottom: celebrity/influencer endorsement (6%)

Instead, they're looking for high quality goods, cost relevant to value, and a good product range. It's no longer enough for brands to be a big name or to spend big on marketing, this generation shops with its eyes wide open. That's evident in the number of freshers who told us that 'small/independent' brands were one of their big new discoveries.

As well as brand love stories, 2021 was also a year populated by break-ups too. The most popular reasons that freshers ditched retailers last year were 'poor working conditions' or 'treatment of employees' – offences that aren't impossible for small or independent brands, but far more unlikely given their size, intimacy, and transparency. Gen Z like that visibility.

There is also a growing desire among younger audiences to shop with female-owned[2] or black-owned (or minority-owned) businesses, as the ethics-driven Gen Z consumer looks to bring equality with their purchasing power. Etsy has a dedicated 'Female Owned' category which ranks at the top of Google – and nearly triple the amount of Gen Z[3] consumers said they would be shopping with black-owned businesses, compared to other generations. Gen Z shoppers are creating an age of commercial positivity, looking to use their considerable purchasing power to reverse injustices in society, and more than happy to put their money where their mouth is.

Figure 20: **What influences freshers' favourite brand choices?**

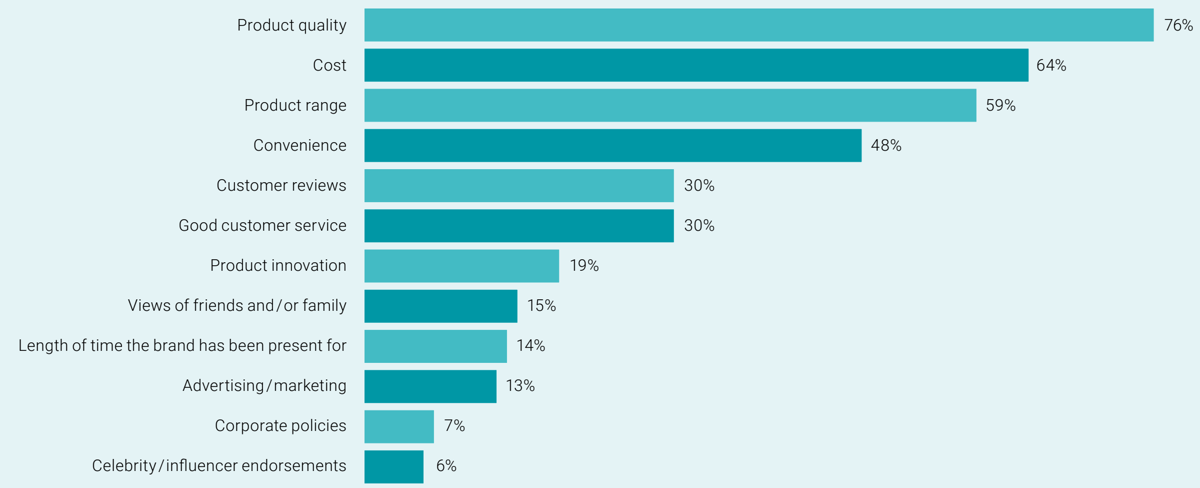


Figure 21:
Freshers' top brand discoveries at uni

1. BLACKWELL'S FOR LEARNING · FOR LIFE; LIDL
2. ALDI; Bershka; Independent / local brands
3. flying tiger copenhagen; asos; Perlego

Figure 22: **Freshers' biggest brand 'break ups' this year**

1.	SHEIN	Poor treatment of staff or poor working conditions and unsustainable
2.	PRIMARK	Poor treatment of staff or poor working conditions
3.	PRETTYLITTLETHING	Unsustainable and poor quality
4.	amazon	Poor treatment of staff or poor working conditions
5.	MAC	Testing on animals / poor treatment of animals
6.	boohoo	Poor treatment of staff or poor working conditions, poor quality and unsustainable
7.	H&M	Poor treatment of staff or poor working conditions and unsustainable
8.	ZARA	Poor treatment of staff or poor working conditions, unsustainable and racism
9	asos	Unsustainable
10.	Nestlé; Apple	Nestle: Poor treatment of staff or poor working conditions. Apple: Expensive

HOW TO SPEND WITH YOUR ON YOUR SLEEVE

Switching brands has always been part of the purchasing process, but today's young shoppers are no longer doing it to find cheaper deals. **The majority of this year's freshers (60%) have decided against a planned purchase because of animal testing**. And around half have made the same decision because of a brand's reputed poor working decisions (54%), unsustainable practices (49%), or underpayment of staff (44%). This act of commercial withdrawal is another tenet of the more considerate and morally motivated shopping practices of Gen Z.

This is a group of consumers which shops with its heart proudly on its sleeve. Long gone are the days when low prices or designer labels were enough to sway the market – the Gen Z shopper pays attention to headlines and does their research on brands. McKinsey's study, True Gen[1], lists 'ethical', 'unveiling the truth', and 'radically inclusive' as some of the most defining traits of Gen Zs. With these consumers, there's little scope for getting away with it.

If freshers find something amiss with a brand, they're more than willing to walk away. We've been asking freshers which brands they've broken up with and why, and for 2020 and 2021 – Shein, Primark, PrettyLittleThing, Amazon, and MAC share the unenviable accolade of making the Top 5 both times around (see figure 22.) The reasons? Almost exclusively 'poor working conditions' for the employees. And three fall into what now seems to be a fatal 'fast fashion' category, an industry that Gen Z are not only avoiding, but actively campaigning against[2].

You can see the same influences on the way that students use social media. Except this time it's not about how these companies treat their employees, but their users. More than a third of freshers told us that they'd stopped using a channel that didn't handle their privacy or data properly (perhaps one of the many reasons we've seen Facebook's usage drop from 85% to 50% since 2015). The ability to 'post content privately and safely' is influential for almost 30% of freshers when deciding which channels to use regularly.

And in an information age where social media can be the arbiter of so much positive change, students want to see high standards from those responsible for monitoring and moderating social media networks. Particularly when it comes to truth – with 45% of freshers willing to walk away from networks with too much 'fake news' or those that over-police their users.

Whatever the service or sector, a student's moral compass guides them towards wanting a better world, and they'll choose the brands that are willing to come along on the journey.

[1] https://www.mckinsey.com/~/media/McKinsey/Industries/Consumer Packaged Goods/Our Insights/True Gen Generation Z and its implications for companies/Generation-Z-and-its-implication-for-companies.pdf

[2] www.refinery29.com/en-gb/gen-z-fast-fashion-sustainability

Figure 23:

Freshers' top reasons for not buying an item from a particular company

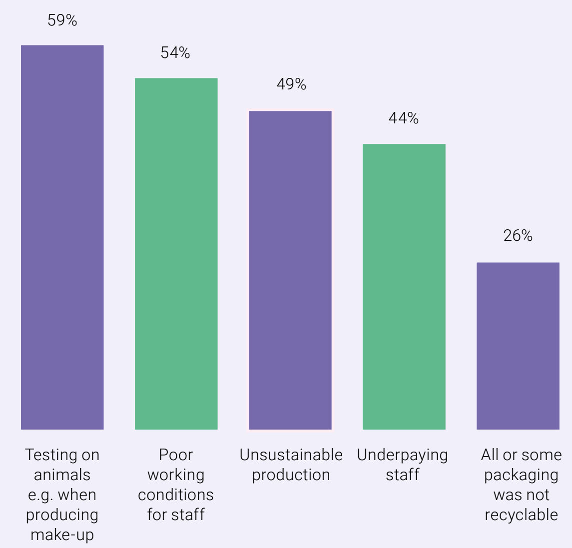


Figure 24:

Top reasons freshers stopped/refused to use a particular social media platform

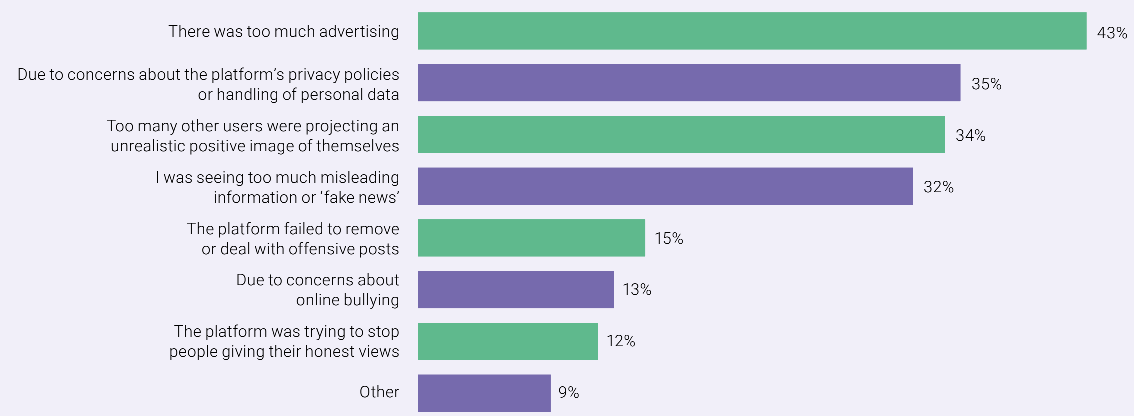
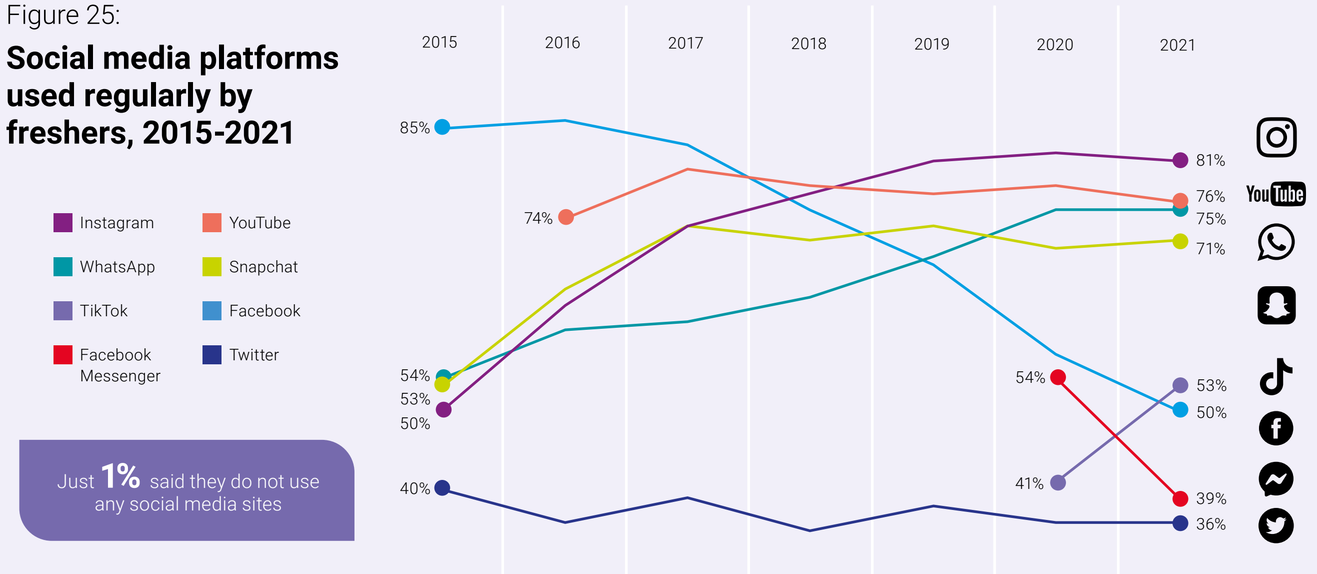


Figure 25:

Social media platforms used regularly by freshers, 2015-2021



NEW TECH,

NEW TRENDS, AND NEW WAYS TO PAY

Younger Millennials were the first to be ascribed digital natives, but Gen Z have been labelled[1] the 'most dependent' on the internet and at the 'vanguard of technology.' And while this is sometimes at odds with what we know about their desire for more real-life engagement, there's no denying that it's difficult to separate student from smartphone.

9 out of 10 of this year's freshers own both a laptop/computer and a smartphone. And year-on-year more are buying this tech specifically for study (tablets less so, but even these have nearly tripled since 2018). Widespread remote learning and remote working have influenced what will likely be a permanent shift in the way the world of engagement works. **Increased online engagement has become part of everyday uni life** – virtual lessons are likely to play an important role even in the post-pandemic world (see figure 8.)

It's the need for a second screen – to carry out tasks and exercises while using the other to participate in a lesson – which may be fuelling the growth of tablets. Notetaking and reading were two of the most popular activities for tablets, and the start of the 2021 academic year saw their purchases growing at double the rate of 2020.

Another driver of the rise in device usage is edtech (educational technology). Already becoming an important part of classroom learning pre-pandemic (e.g. with Kahoot! allowing for interactive in-person participation), the use of edtech to create more inclusive digital experiences during periods of restrictions has seen it grow exponentially. Particularly popular in the US[2], edtech adoption is now 52% higher than pre-pandemic levels. The surge in popularity of apps like Google Docs, YouTube, Zoom, and Jamboard may have initially been a response to lockdown conditions, but it may have also created a more relevant learning experience for this digital generation.

Figure 26:
Tech freshers bought for uni

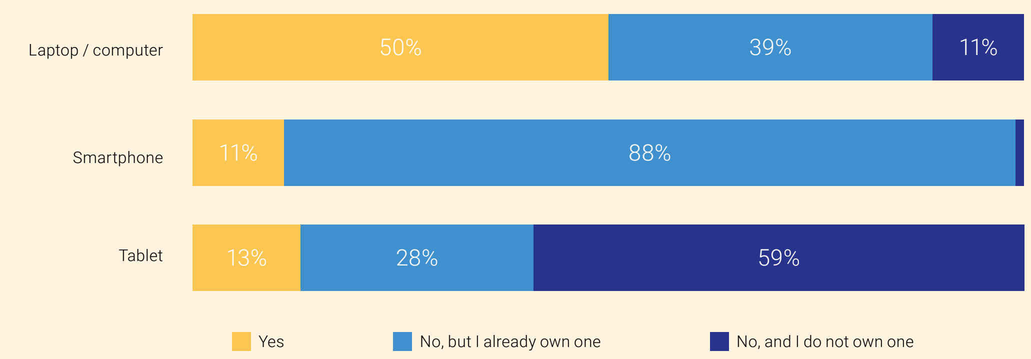


Figure 27:
What freshers use a tablet for

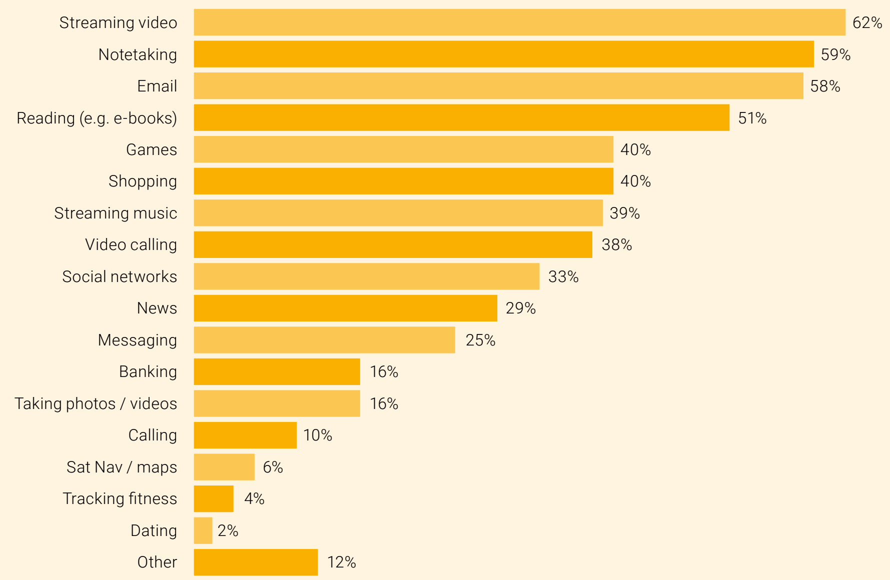
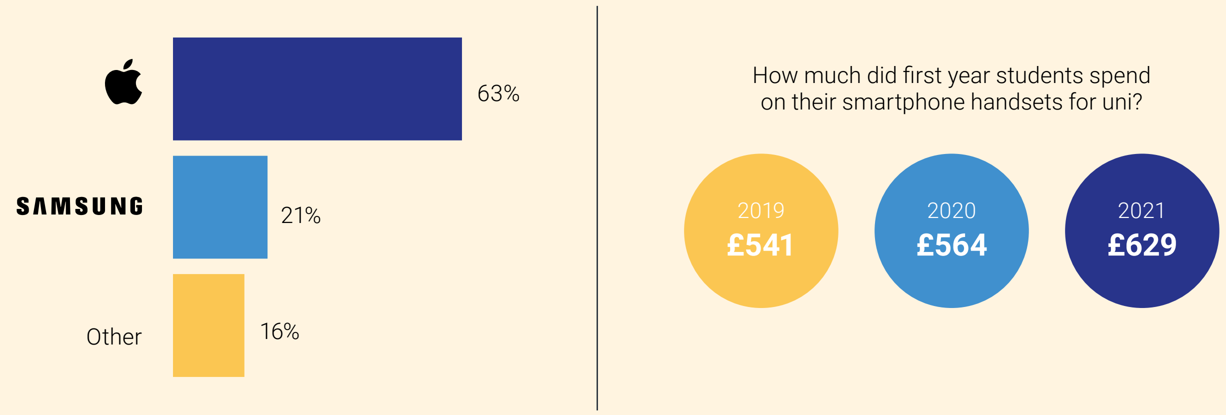


Figure 28:
Freshers' uni smartphone purchases



The obvious challenge of all this is the impact on those with less financial means. The average spend on tablets this year is up by £83, while smartphone spend is up £65 – considerable increases over just a 12 month period. Plus, Apple is the market leader across the board – and being one of the more expensive brands, the potential tech bill for students starting uni could now total more than £2,000:

- Smartphone owners are spending £629 on average
- Tablet owners are spending £645 on average
- Laptop owners are spending £799 on average

Yet the evolution of e-commerce and the positive digital impacts of the pandemic are offering solutions.

Take for example textbooks, which have been prohibitively expensive for some students in the past – a four-year pre-pandemic study[3] showed that 41% of students delayed purchasing them, 30% chose not to buy at all, and 15% let their cost dictate their course and class choice. Enter Perlego – an academic ebook subscription service which charges a monthly fee for remote access to its entire textbook library – now the market leader among freshers (ahead of Kindle and Audible). Perlego, and this Spotify/Netflix approach overall, may have become more popular for logistical reasons of access from home – but also represents a more affordable model for digital learning as a whole.

With pay-monthly textbooks on the rise, plus the majority of freshers on pay-monthly phone contracts, the high purchase costs of essential tech may be less of a barrier than they have ever been.

[1] www.businesswire.com/news/home/20200706005543/en/Generation-Influence-Gen-Z-Study-Reveals-a-New-Digital-Paradigm

[2] https://thejournal.com/articles/2021/09/09/ed-tech-use-accelerates-beyond-the-peak-of-the-pandemic.aspx

[3] www.bdo.co.uk/en-gb/plugdin/insights/the-evolution-of-ed-tech-trends-to-watch-in-2022

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Figure 29:
Freshers' uni tablet purchases

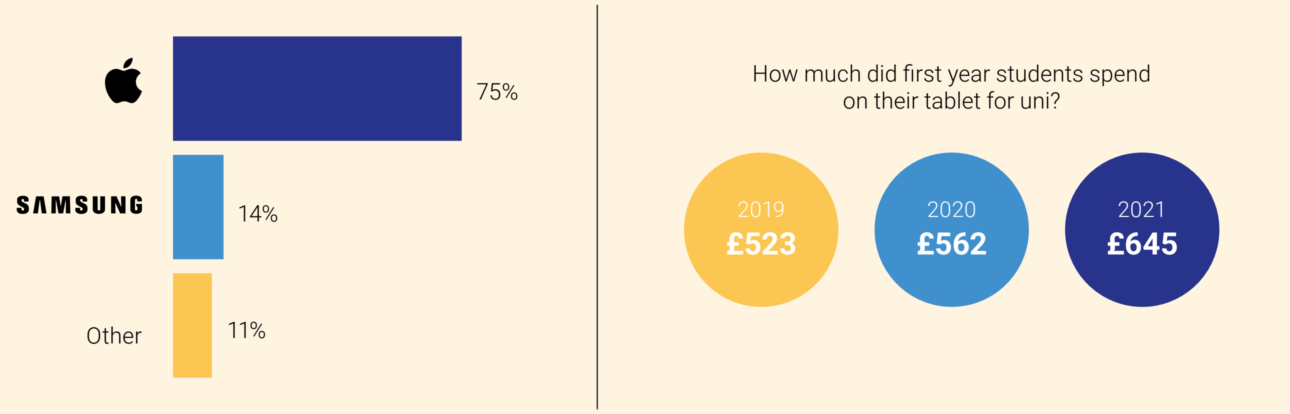


Figure 30:
Freshers' uni laptop/computer purchases

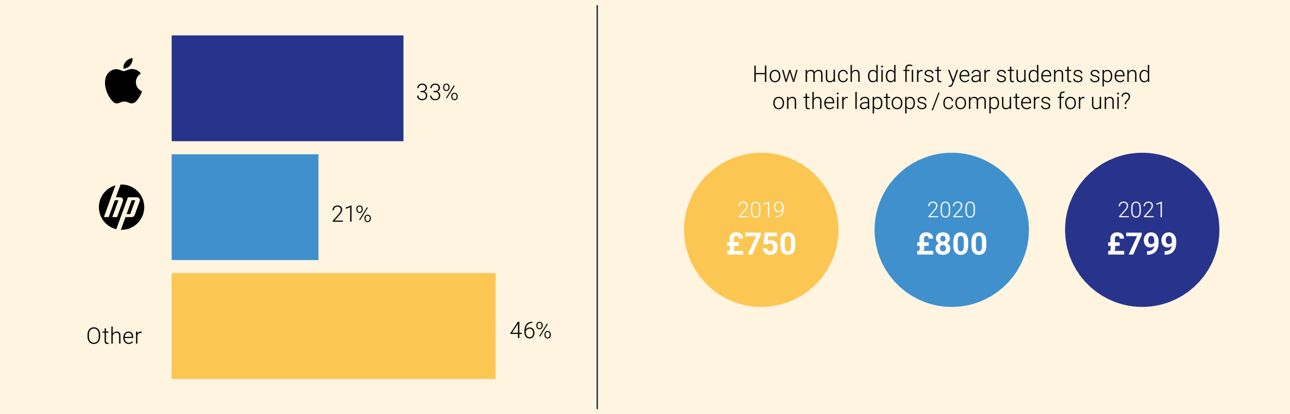
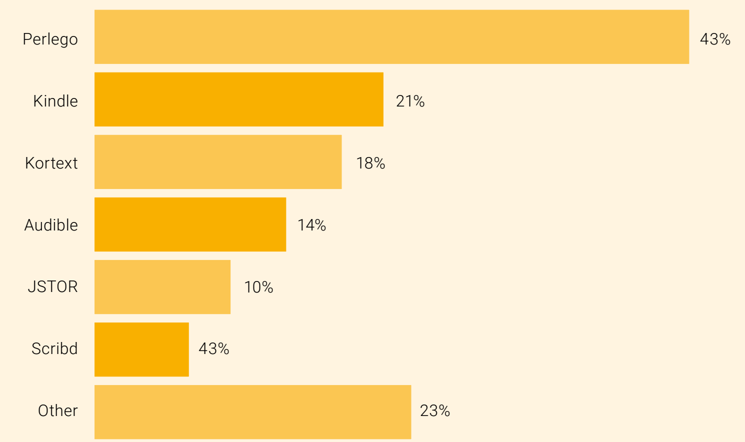


Figure 31:
e-book services used by freshers for uni



WHAT REALLY MAKES TIKTOK TICK?

There are few businesses with pandemic growth stories like TikTok.

The short-form video app, beloved by Gen Z audiences, gained much of its fame and fortune via the increased digital reliance caused by COVID lockdowns. The events of 2020 resulted in 60% growth* and another 41% in 2021 – and we saw its usage among freshers increasing at a rate 10x that of many of its rivals (see figure 25.) None of its serious competitors climbed more than 1% (Snapchat), while most remained static (WhatsApp, Twitter) or even declined (Instagram, YouTube, Facebook).

Its popularity was so influential that Instagram, Facebook, and YouTube all launched their own takes on the TikTok approach. Instagram released Reels in 2020, Facebook tried (and failed) with their own video app called Lasso, and YouTube's new bite-sized and mobile-friendly videos, Shorts, appeared in 2021. But none have captured and controlled the public psyche in the same way as TikTok – where mega-celebrities can be created through the virality of one song or video (like Lil Nas X and Doja Cat).

And it's not just creativity and entertainment behind the success of TikTok. **Gen Z students now have both the luxury of choice and the digital fluency to immediately recognise when something is up their street**. With a third of this year's freshers stating that their use of social media networks is dependent on its handling of privacy and data (see figure 24), TikTok has stolen a march on the competition. Compared to its main rivals (Facebook, Instagram, and Twitter) the focus is much more about consumption than output. Just 55%** of TikTok users actually create their own videos – and less than half do anything beyond 'passive browsing'. Whether by design or coincidence, it's a social network where there's inherently more scope for privacy, anonymity, and safety.

TikTok also performs well in the advertising arena. Unlike the approach of its rivals, where ads are polished and TV-ready, the authenticity of short-form video content has led to most TikTok advertisers creating their ads in the spirit of the platform. At first glance, many ads are indistinguishable from user-generated content, and the more successful ones inspire actual user-generated content in response and become trends of their own. TikTok's users – who are familiar with digital tactics, more responsive to creative/novel approaches, and appreciative of the chance to interact – often exhibit a higher engagement rate than those of other social platforms. Lancaster University's campaign, using student ambassadors to create authentic ads, was so successful that it was praised on TikTok's website***.

The meteoric rise of TikTok should be credited to much more than the success of its trends. It represents a new take on social media which is much more aligned with the principles of today's youth. In just a year, the number of students who would choose TikTok if forced to pick a single social media channel, more than doubled. If its current growth rate continues, it could be the most-used platform by freshers in just three years.

[1] https://techcrunch.com/2021/12/20/tiktok-to-rank-as-the-third-largest-social-network-2022-forecast-notes/
[2] www.omnicoreagency.com/tiktok-statistics/
[3] https://www.tiktokforbusinesseurope.com/inspiration/lancaster-university

Figure 32:
Social media platforms freshers use regularly

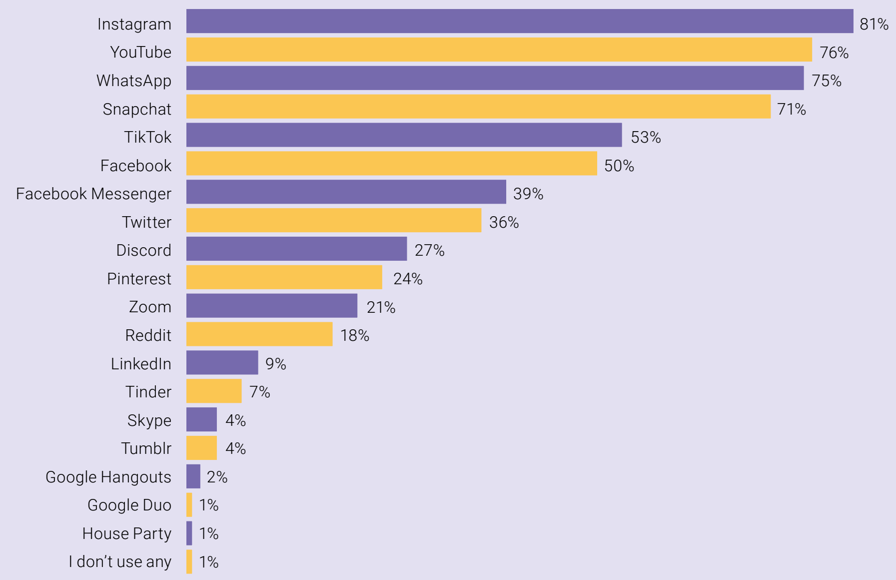


Figure 33:
Top influences on freshers' choice of social media platform

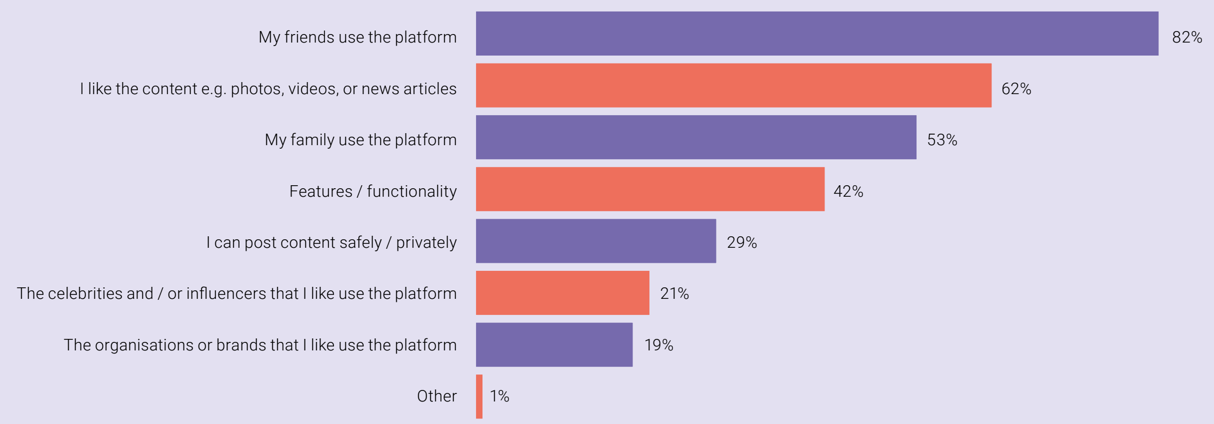
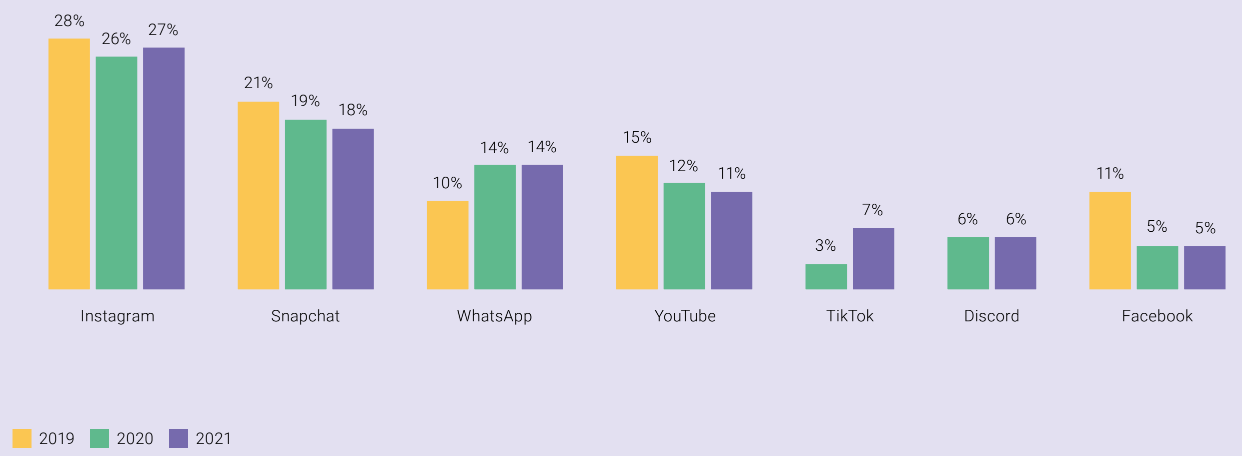


Figure 34:
Social media platform freshers would use if limited to just one, 2019-2021



A BRIGHTER OUTLOOK:

GLOBETROTTERS AND HOMEBIRDS

One of the greatest impacts of the pandemic has been in the restriction of travel. And when the UK university experience is so characterised by studying away from home, it's been sharply felt by students and their families.

Between 2019 and 2020, the number of students planning to limit their trips home to only between terms increased by 75% – while the numbers of those who travelled home more than once a week went from 31% to just 2%. Everybody was staying put – either on instruction or instinct. But the figures from 2021 paint a picture that more closely resembles pre-pandemic life – most travel intentions are making their way back up to 2019 levels. But there is one very important difference. **The number of students who won't be travelling far because they live at home or on a nearby campus has doubled.** Increasing from 10% to 20%, this highlights a significant lasting impact of COVID. With the 2020 academic year so disrupted, and the pandemic becoming an accepted part of everyday life, many of 2021's new students chose to study close to home. Might they represent a new target for brands, a sub-section of students with potentially lower living costs?

But many students who live further away are now planning more regular trips home. And safety and confidence are the key drivers behind their renewed positivity. With the vaccine/booster rollout, freshers heading home are much more comfortable using public transport than they were last year – with the number of those who consider trains, buses, metro, tram, and tube as 'very safe' all double that of last year. Almost two-thirds of freshers will use trains to travel home this year – viewed as perhaps more socially-distanced than buses/coaches, but without the traffic risk of cars.

The only modes of transport which more than 10% of freshers consider 'very unsafe' are bikes and scooters: both of which are adversely affected by the busier post-lockdown roads. While walking is considered less safe than it was last year (perhaps because late nights are back, perhaps because of more traffic) it is still the most common form of transport in university towns/cities – with 78% of freshers travelling on foot at least once a week. When it comes to travelling around the area they study in, buses and trains make up the most popular top three modes of transport. Students are, by now, used to things changing very quickly – so it's not a surprise to see that a minority opt for weekly/seasonal tickets, potentially to minimise financial commitment and maximise flexibility in travel.

And while domestic students plan to spend more time at home and make up for lost time, international students have also received a boost to their hopes of studying abroad. With greater opportunity for international travel and the growing number of overseas vaccination certificates being accepted – many universities will welcome the potential for an influx of global learners.

There is also growing positivity about the transnational opportunities of remote learning – where terms and/or modules are taught by different universities around the world. At times when travel is restricted, this represents a good opportunity to capture overseas student fees, and at times when travel is allowed, planes, trains, and vehicles can all be fired up quickly. **All students will be watching hopefully as the world re-opens and travel becomes a possibility again, both for tourism and study**. We know from last year's surveys that the pandemic has ignited a wanderlust in students and that travel has become a greater priority – so once permission and confidence are back, we expect to see student globe-trotting making a comeback.

Figure 35: **How often freshers plan to travel home from uni**

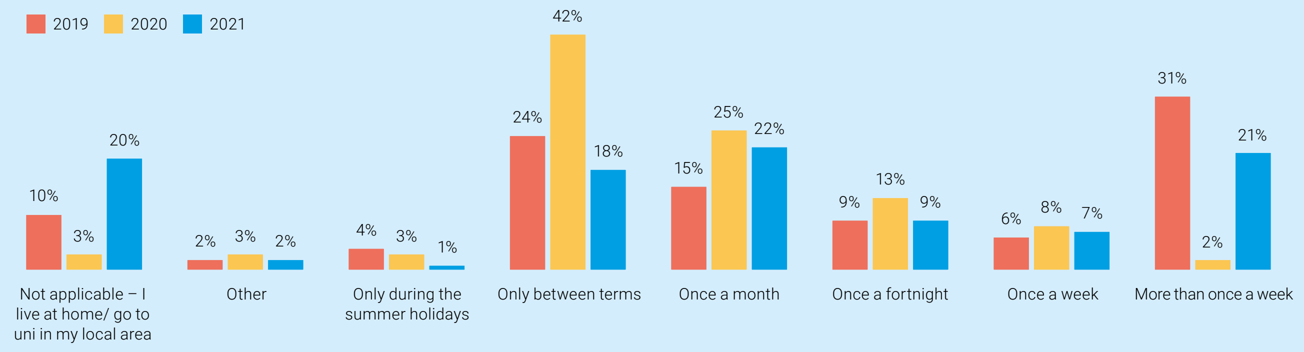


Figure 36:
How safe freshers feel on different modes of transport

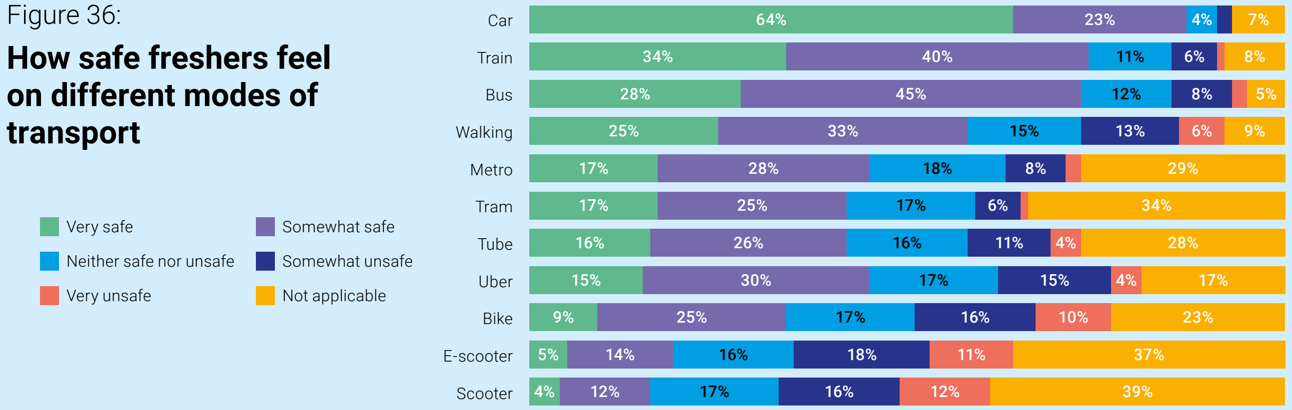


Figure 37:
How often freshers use different modes of transport in and around their uni town/city

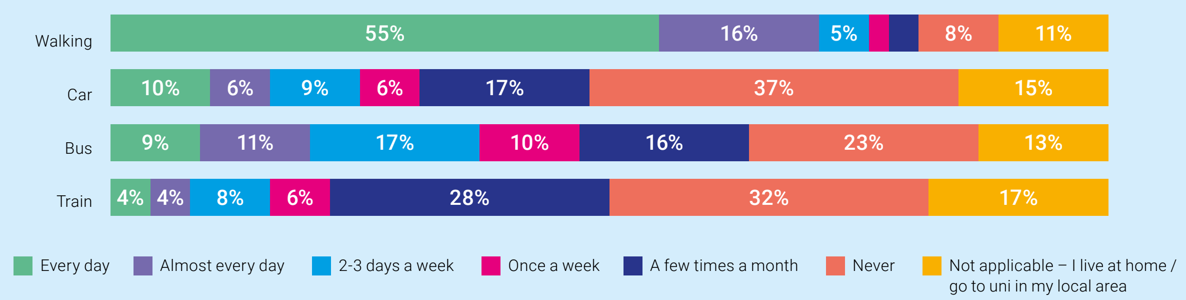
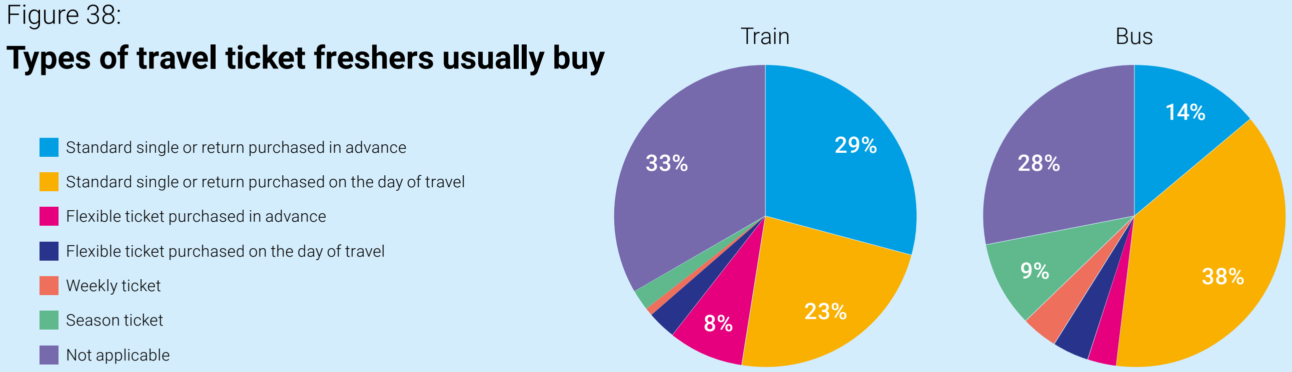


Figure 38:
Types of travel ticket freshers usually buy



CONCLUSION

It has been a long time coming, but the curtain finally appears to be lifting on the UK pandemic.

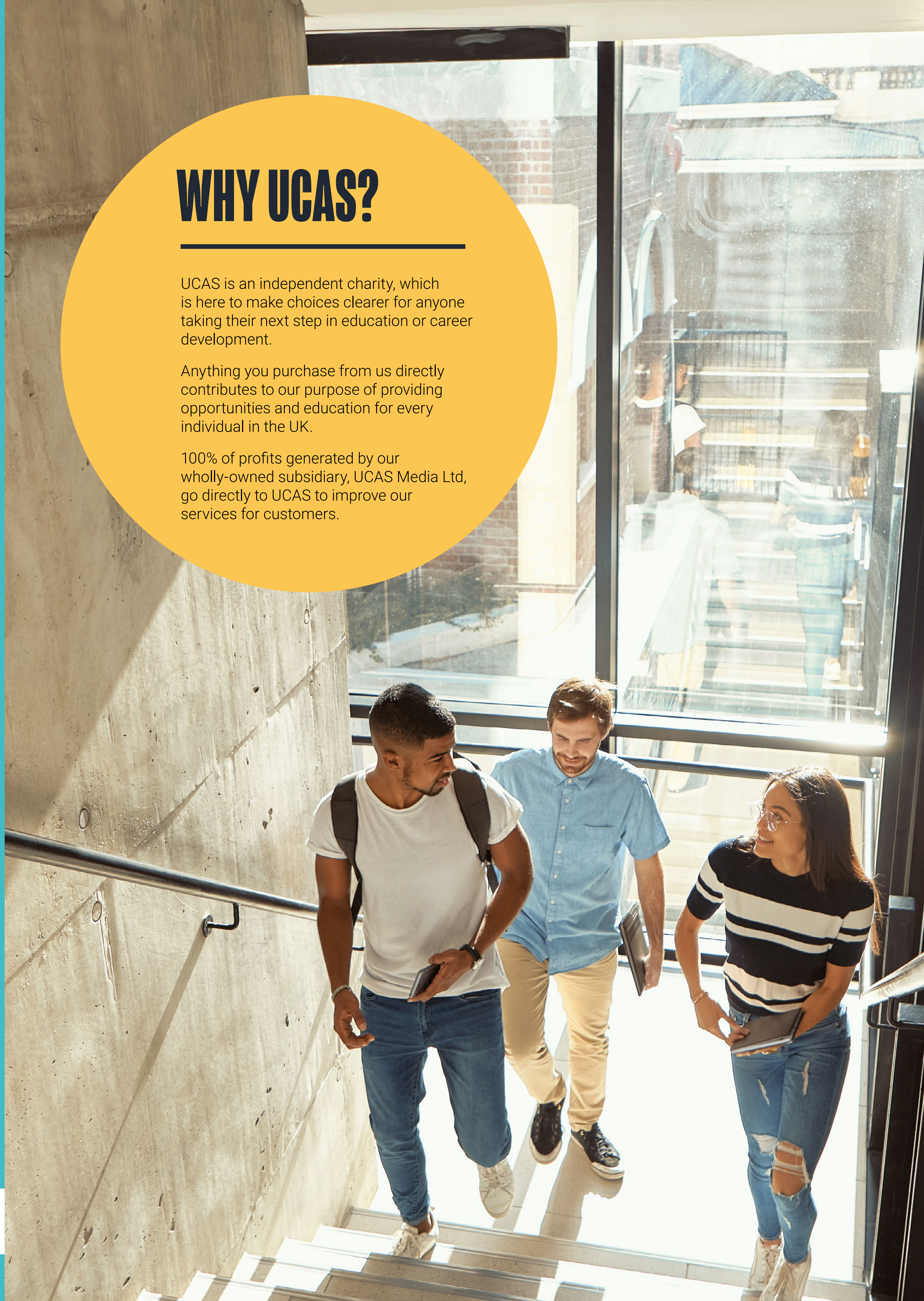
The current crop of students, and their hopeful replacements, are more than ready for what comes next. Whether that's the university experience they've always dreamed of, or graduation into a healthy job market, their sights are firmly fixed on moving forward.

But there's no escaping that COVID has left a lasting impact. As consumers with a greater sense of purpose and equality than previous generations, students' experiences in 2020 and 2021 have further sharpened their appreciation of what matters most. **This year's freshers look for value over cost, for physical and digital experiences, for brands which mirror their values, and for more homely lifestyles than we once associated with students**.

And these are attributes which are unlikely to disappear with COVID. Many are more concentrated versions of wider Gen Z behaviours which have been emerging for some time – and as the younger members of the cohort see these behaviours in the older, a new customer persona for today's youth consumer is being created.

Brands must now respond quickly to maintain their relevance and market share. Student shoppers are more selective than ever, but they're also spending more than ever. This is a growing consumer base with an intricate set of standards, and as UK student numbers approach a record high of 3 million, they represent an important slice of the Gen Z pie.

The rules of engagement have changed, but we can help you meet them.



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UCAS is an independent charity, which is here to make choices clearer for anyone taking their next step in education or career development.

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Looking to reach Gen Z?

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Get in touch to find out more about how we can use our know-how, data and marketing tools to connect with a student audience and build a connection with Gen Z that could last a lifetime.

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ucasmedia@ucas.ac.uk
01242 544 881

UCAS
Rosehill
New Barn Lane
Cheltenham
GL52 3LZ

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