

Student Lifestyle Report 2023



UCAS

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Welcome to the UCAS Student Lifestyle Report for 2023.

Every year, we publish our research into the preferences and practices of a brand new generation of freshers. By surveying them on everything from spending habits to social media usage, we can understand what's driving their decisions and behaviours, and how student-focussed brands need to adapt to keep up.

The full report will be published in April 2023, but we're releasing it chapter-by-chapter each week from today.

Methodology

We sent 3 surveys to students beginning their first year of higher education in the UK, collecting responses between 2nd and 15th November 2022. In total, 3,837 freshers 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.

Chapter One

The Cost of Living



Introduction

Cost of Living – Real Estate

In few places is the rising cost of living going to make such an impact as in student accommodation. Rent makes up a huge part of student spending and many have to use multiple income sources to pay for it. Fortunately there's been a staggeringly impressive response and they've stepped up to the mark, and then some. But that doesn't mean we can rest on our laurels.

When we anticipate application volumes to skyrocket (which we do), the student accommodation sector is going to be a fascinating thing to watch. And whilst a booming student population points towards an exciting and thriving period for higher education, it also highlights a very real significant challenge when it comes to housing. Where are they all going to live?

The rising cost of living will inevitably lead to more students considering the option to live at home (although keep reading, because that's not quite as straightforward as it might seem), but accommodation providers will be doing everything they can to convince them otherwise.

Bills included, free wifi, campus proximity, state of the art facilities – all very enticing features. Also all very important to ensure a positive student experience, which is a pursuit that goes far beyond the student accommodation sector. It's these features that make the

difference when students are considering which direction to take in a crucial point in their lives and – alongside the cost of living – student expectations are rising too.

Over the next few years, demand will significantly outstrip supply. Now, more than ever, we need to support the next generation of students.

As accommodation providers work tirelessly to refine their offer and ensure that students have somewhere great to live, the UCAS mantra (Making Choices Clearer) has never been more poignant. My focus is going to be on developing true partnerships with accommodation providers, as well as brands and businesses beyond the sector, to ensure they're communicating everything they need to, to everybody who needs to hear it.



Ollie Wells
Customer Success Director,
Real Estate, UCAS



Home Sweet Hometown

Every September, like clockwork, a mass migration takes place across the British Isles.

By plane, by train, by automobile – the best part of 3 million¹ undergraduates leave their hometowns behind, bound for university. And when we say ‘almost all’, we mean it. **In 2019, 90% moved away.**

But during COVID-19, when families pulled closer and lessons went digital, the number of students staying home rose sharply. And in 2021, even as we began to move away from the effects of the pandemic, still only 80% chose to move away. **Now it’s finally rising again – with 82% heading off to campus in 2023.** So is this a slow return to form, or a settling of the new normal?

Hometowns are, by their nature, places of familiarity, friends, and financial security – and in many other countries, staying there is the norm (75%² of students live at home in Italy). So, for this generation of freshers facing a cost-of-living crisis, what does the future hold?

What’s clear is that they’re still going to university in their droves. We remain on course to see one million applications for the first time this decade and the number of 18 year olds continues its demographic climb. The cost-of-living isn’t changing their plans at a fundamental level.

But on a practical level, a lot is changing. The family home is in the same fiscal position as the student home – and freshers are having to become more self-sufficient. They’re getting

less help from their parents – for purchases like textbooks, laptops, tablets, and entertainment – and more of them are taking part time jobs.

So it wouldn’t be outlandish to suggest that more students will stay at home from here on out. It’s an easier ride for them in many aspects, but it’s just not the university experience that most have planned for. Campus, halls, and house shares are a fundamental part of the appeal. So that seedling 2% rise, as a few more choose to move away again, could be the vanguard leading the way back to the pre-pandemic experience.

There’s positive news from NatWest’s Student Living Index³ too. It shows that students, despite the cost-of-living, are better off this year too – with incomes up by 65%, against rising costs of only 29%, and rents 12% down. If anybody can take a bad situation and make something good out of it, it’s Gen Z.

It’s this tenacity in the face of adversity that earned them a second nickname during the pandemic – Generation Resilient. And whilst we shouldn’t assume that they can weather any and every storm, they’ve already proven themselves a stoic bunch, to say the least.

So time will tell whether 2024 sees the return of those mass migrations back to uni but, as far as we can see, they’ve already started.

¹ <https://commonslibrary.parliament.uk/research-briefings/cbp-7857/#:~:text=In%202021%2F22%20there%20were,overseas%20students%20studying%20postgraduate%20courses.>

² <https://www.savills.co.uk/blog/article/208565/commercial-property/how-different-european-countries-house-their-student-populations.aspx>

³ <https://www.natwest.com/life-moments/students-and-graduates/student-living-index.html>

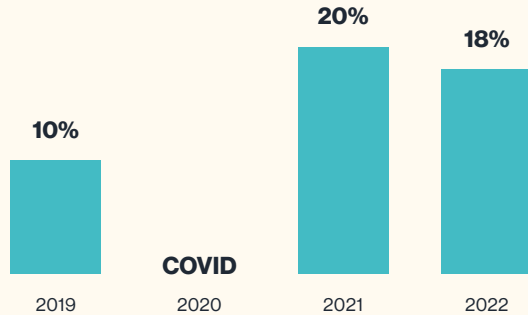
Figure 1.

Respondent demographics

► We may already be seeing the impact in the number of students who decide to live at home (as well as a bounce back from COVID).

Q: How often do you visit home? Those that answered 'live at home'.
Respondents: 1,169

% of students living at home



74% aged 18-19



97% UK, 2% non-EU, 1% EU



65% female, 35% male

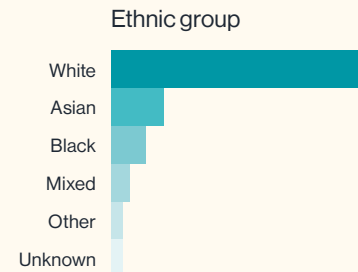
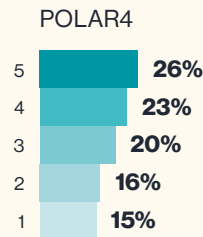


Figure 2.

Students are increasingly bearing these costs alone as parents offer less monetary support.

Who paid for your...	% of parent(s)/guardian(s) paying for items in 2022	YoY change
Laptop/computer	30%	-5% (since 2018)
Tablet	21%	-8% (since 2018)
Textbooks and/or reading materials for uni	8%	-6% YoY (since 2021)
Entertainment services	52%	-3% YoY (since 2021)
Smartphone handset	32%	+3% YoY (since 2021)

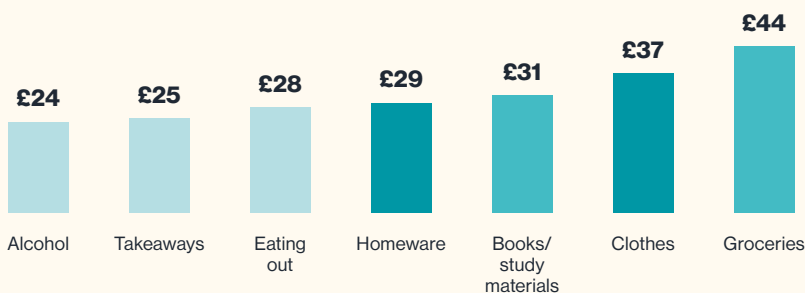
Figure 3. Q: During a regular week at university/college, how much do you spend on the following? Respondents: Approx 500

Spend has dropped for the first time since 2019, returning to pre-pandemic levels.

£76 Although the smallest spend per sub-category, fun makes up 35% of total spend

£75 Essentials make up 34% of total spend

£66 Lifestyle makes up 30% of total spend



Total spend in a typical week:

£219

2021 spend: £235
2020 spend: £229
2019 spend: £214

Figure 4. Q: Which of the following did you buy for university? Please select all that apply. Respondents: 1,035

Spending across almost every category has decreased this year, often following a long-term trend.

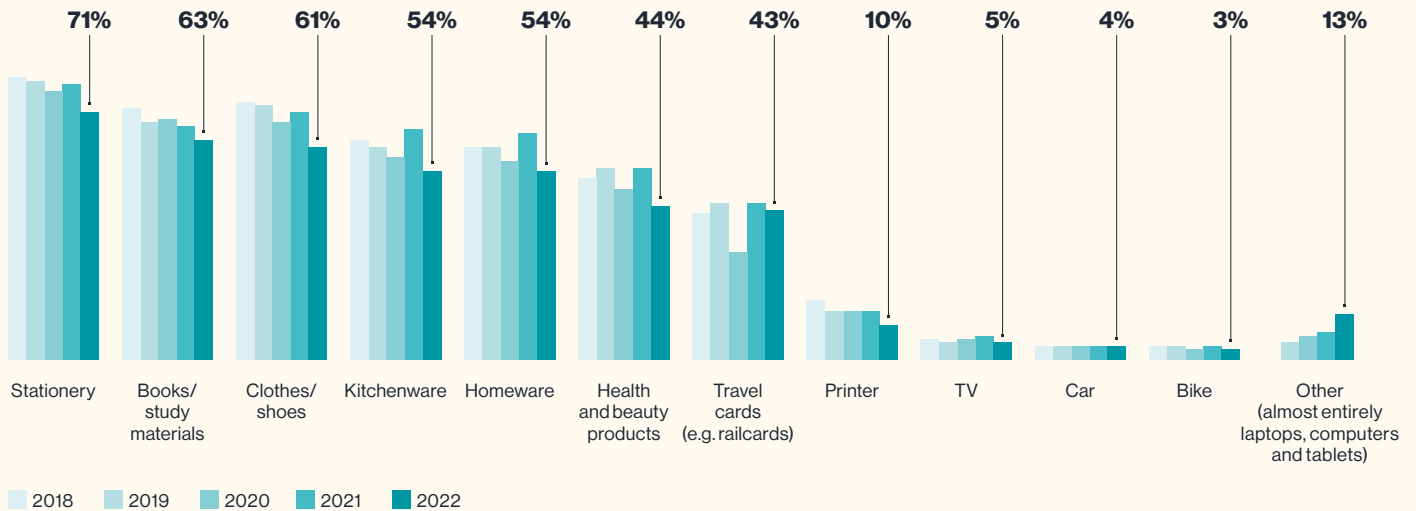


Figure 5. Q: Of the things above which you told us you bought before starting uni, how much money did the following people spend in total on these items? Respondents: Approx. 900

This has led to a dramatic decrease in total spend before starting university in 2022.

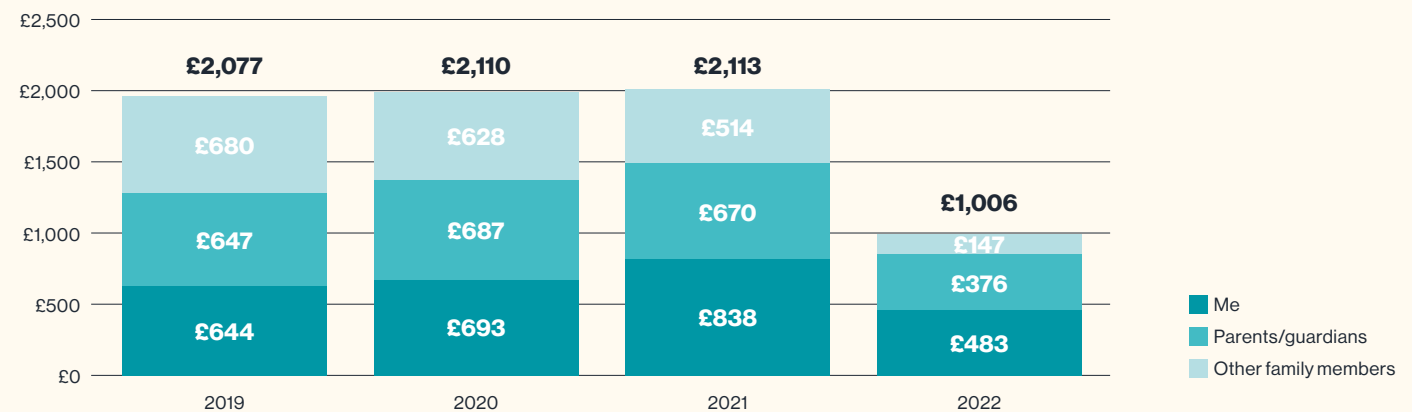
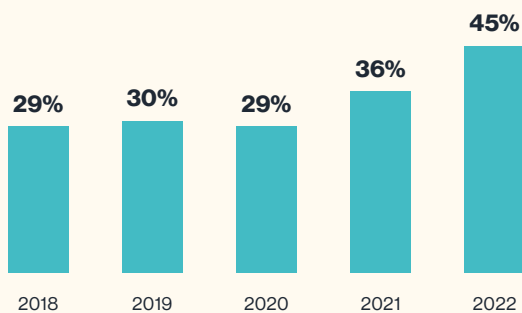


Figure 6. Q: Is there anything you did not buy for uni that you now wish you had bought? (Answer: YES). Respondents: 1,020

Which may explain the large increase in the % of students wishing they had purchased something before university.



Is there anything you did not buy for uni that you now wish you had bought? (Answer: YES)

- Laptop/Computer**
 'A better laptop with more storage for my coursework'
 'A smaller laptop, to carry around and use in lectures'
 'Good Laptop that will serve me throughout my study years'
- Kitchenware**
 More kitchenware – can opener, steak knife, scissors, airfryer'
 An air fryer was mentioned over 20 times
- Clothes/Shoes**
 'Warmer winter clothing (gone north for uni)'
 'More clothes, especially for my course which has a lot of outdoor practical'
- Printer**
 'I wish I had gotten printer and a scanner which would help me in university for some documents I might need to print out'
- Homeware**
 Decorative items for my room'
 'Homeware – cushions, lamp, throw blankets, decoration'
 'Some decor for the accommodation so it felt more homely'



The Penny-wise Pioneers

Whichever way you cut it, students are spending less money before they get to campus.

In almost every category we track, pre-uni spending is down on last year – stationery, books, clothes, homeware, printers, TVs, bikes. But in many cases last year was an anomaly, an excited reaction to the reopening of the world, and the high street. Student spending on these items has been on a slow journey south for years.

And whilst there are plenty of real-time reactions to the increased cost-of-living, which do result in less net spending, the main change is that they're banking their money for term time. And banking it in a big way, with pre-uni **purchases down from £2,113, to £1,006.**

Almost half arrived on campus this year without investing in something they needed, and more still have their eyes on a purchase they've been lining up for a while.

But in real terms, once they're at university, **week-to-week spending is only down by £16.**

Over a 36 week study year, that means they're still splashing almost **£8,000 per annum.**

And as well as keeping tighter pre-uni purse strings, they're getting savvier with making savings too. More of them are using discount platforms (+9%), budget supermarkets (+5%), and SIM-only phone plans (+3%). It's yet another Gen Z tale of playing the cards they've been dealt – and playing them well.

The Student Money Survey⁴ says so too – it paints an entrepreneurial picture of up to 20 different revenue streams currently being used by students. Part-time jobs, self-employment, paid surveys, stocks and shares, and cryptocurrencies all play an important role in boosting student income. And almost a third have their own business or side hustle, alongside their studies.

There's also centralised help on the way. Rents at Scottish uni halls are currently frozen, Northern Irish maintenance loans are increasing by 40%⁵, and all UK tuition fees are fixed for the next two years, as part of a £15 million⁶ hardship fund.

The situation isn't perfect, and the enterprise of students may do nothing more than maintain the disposable income levels of a pre-pandemic age, but there is plenty to admire. At this rate they're on course to sweep aside the outdated student stereotypes and, simultaneously, transform themselves into a new workforce with higher financial literacy, greater entrepreneurial spirit, and bundles of resilience.

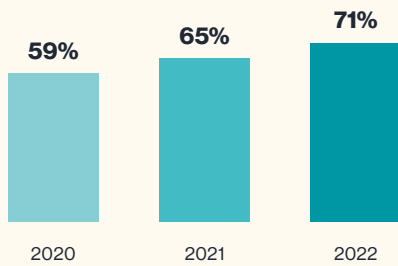
⁴ <https://www.savethestudent.org/money/surveys/student-money-survey-2022-results.html#key>

⁵ <https://commonslibrary.parliament.uk/how-is-the-rising-cost-of-living-affecting-students/>

⁶ <https://www.gov.uk/government/news/cost-of-living-boost-for-students>

Figure 7. Q: Are there any items that you currently have your eye on but haven't yet purchased? (Answer: YES). Respondents: 1,013

And the increase in those who are have restrained themselves from purchasing something they want.



► POLAR Q1 are most likely to want something (80%), and Q5 least likely (63%)

- 1 Clothes/Shoes
- 2 Laptop/Computer
- 3 Tablet
- 4 Health & beauty products
- 5 Headphones
- 6 Books
- 7 Laptop/Computer accessories | Phone
- 8 Kitchenware
- 9 Bag
- 10 Games console

Figure 8.

Use of discount sites is also increasing – 89% use at least one of these student discount sites (vs 80% in 2020 and 2021).



UCAS saw a +7%pts year-on-year increase

Men are less likely to use a discounter, with 17% saying they do not use any of these sites.

Figure 9. Q: What type of phone plan are you on? Respondents: 1,167

Instead, costs may be cut on airtime plans – SIM only plans are increasing in uptake, rising to a high of 26% this year, whilst monthly contracts fell to a low of 58%.

What type of phone plan are you on?

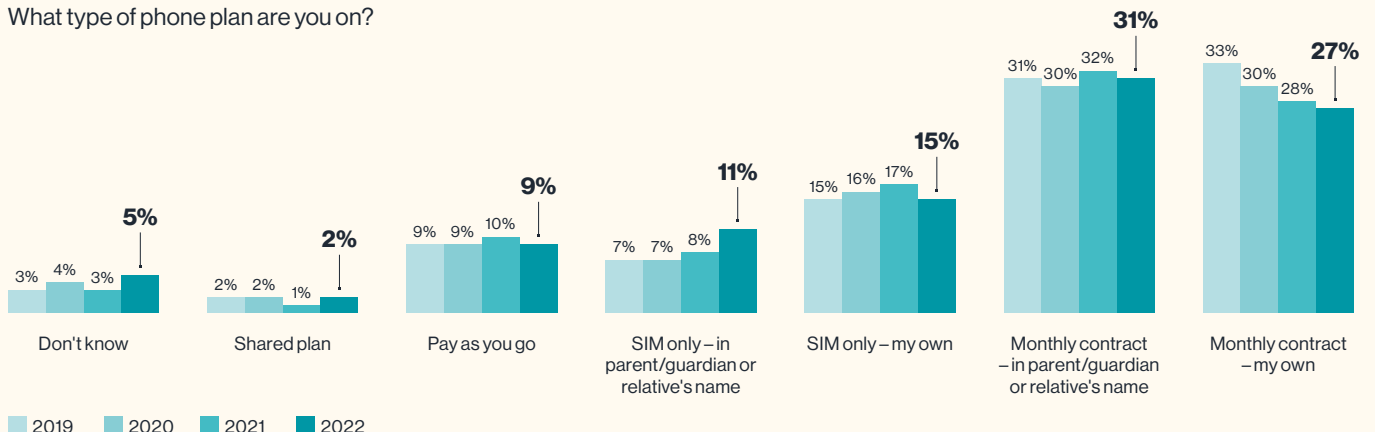




Figure 10. Q: When you're at university or college, where do you buy groceries from? (Please tick all that apply). Respondents: 1,013

Tesco leads the way for grocery shopping, but budget supermarkets are in a clear 2nd place, and use is increasing

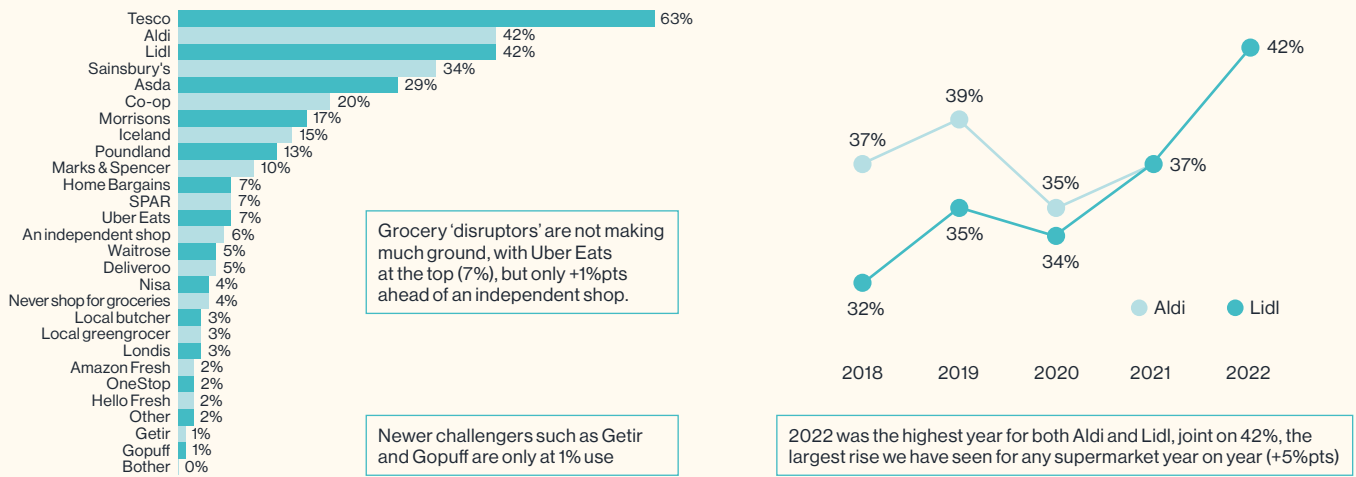


Figure 11. Q: What factors are important when choosing which takeaway to order? Respondents: 1,046

Cost is by far the most important factor when choosing a takeaway, and deals/discounts was the only other factor to increase YoY

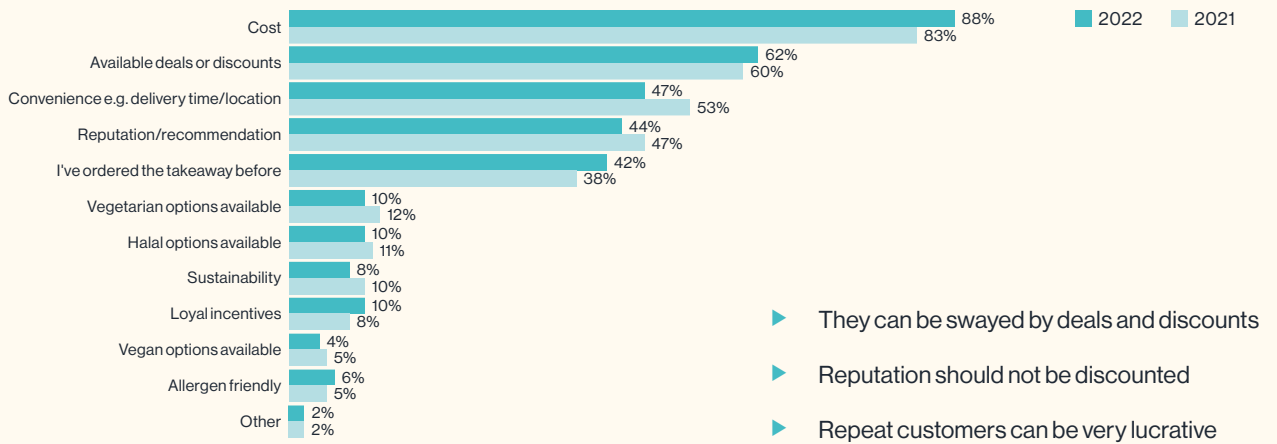


Figure 12. Q: How often do you get a takeaway? Respondents: 1,169

This may go some way towards explaining why frequency of takeaways orders is decreasing

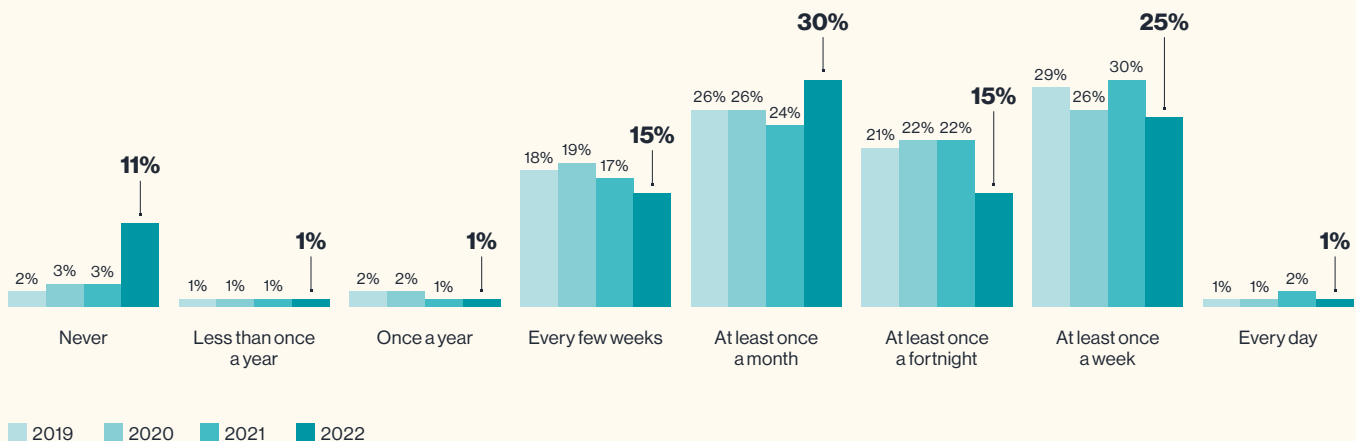


Figure 13. Q: Since moving to university, have you had to cut back on any of the following items because of the cost of living? Respondents: 1,142

And almost half of students say they have cut back on takeaways due to the cost of living

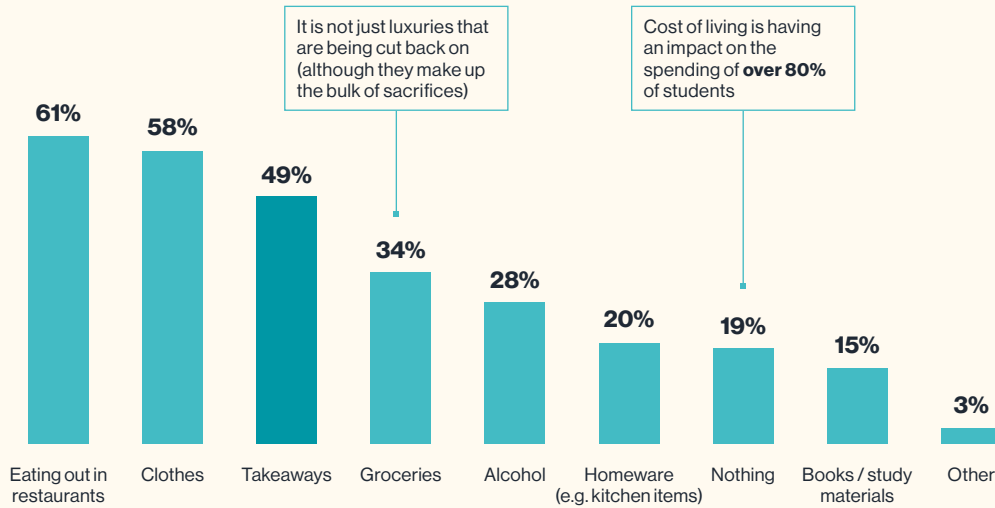


Figure 14. Q: During a typical week at uni, how often do you do the following? Respondents: 1,172

In fact, they are mostly likely to be eating home cooked meals on a regular basis, with takeaways and restaurants less frequently used

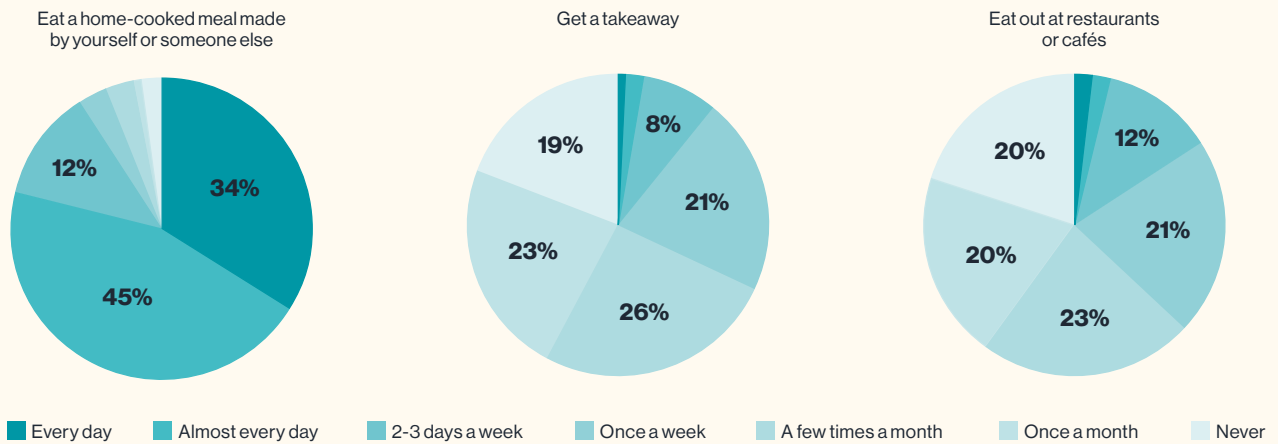
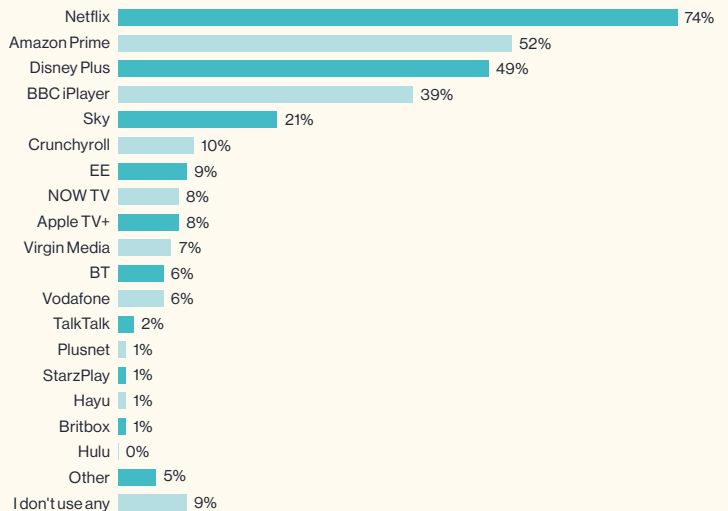
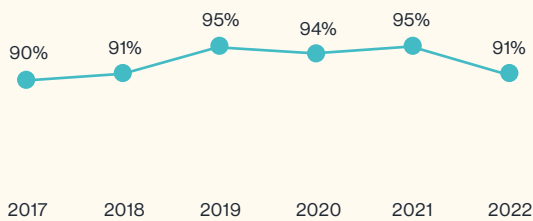


Figure 15. Q: Which of the following entertainment services, if any, do you use? Respondents: 1,035

There may be signs that video streaming could be affected by cost of living, with 2022 the lowest proportion using at least one service since 2018

Proportion using at least one video streaming service



Chapter Two

Lifestyle & Spending



Introduction

Student Lifestyle

This year's students are arriving with the traditional, familiar, welcome, infectious excitement of new friends and new experiences. But this time around, that usually unbridled joy is a little more, well, bridled.

Their predisposition to be financially careful is already at play, with significant cutbacks on how much students have invested in their pre-uni supplies. But once they're in halls and on campus, life will have no choice but to kickstart as usual.

Week-to-week spending habits reveal that, despite the competing pressures, students haven't lost sight of why they go to university: stationery and course materials are where they spend the most, outside of groceries. Their education comes first! Aldi and Lidl, the lifesavers of shoppers on a budget and the most popular student supermarkets when combined, have a huge opportunity to utilise their middle aisles to monopolise on more than just groceries in the thrifty year ahead.

UCAS is helping the youth population by being the bearer of choices; from educational opportunities to employer matchmaking to financial advice and guidance. We're here to help them make sensible and informed choices, whether they're academic or not.

Students may be spending less in some areas, but it doesn't mean that the curve will always be in descent. Far from it. And remember, these young adults are the consumers of tomorrow and, with more of them taking up paid opportunities like apprenticeships, more of them are going to have more purchasing power, more quickly.

It's not a bleak picture for student-focussed brands this year, it's just a different one. Almost half of current freshers are still shopping for something they wanted to buy before university, so it's up to us to make sure they have the right information to make sensible purchases. By providing sympathetic guidance, and partnering with brands who want to do their bit too, we can help them navigate this cost of living challenge and come out better for it on the other side.



Lavina Chainani
Customer Success Director,
UCAS



A Tale of Two Halves

The Great British University Experience is a perfect marriage of studying and socialising. Campuses in the UK are as playful as they are pragmatic – delivering one of the world’s most robust education systems alongside a culture of forging friendships and learning life skills.

It’s this stoic commitment to both sides of the coin that has helped keep applications rising, even during a global pandemic. But with the ripples of COVID as yet still rippling, and the cost of living not yet falling, do students still hold that giddy excitement of new experience?

When we asked what they were enjoying most right now, meeting new people topped the list – with 75% of freshers happily expanding their social circles. But at the same time, more than a third were approaching the same task with trepidation – with 34% deeming making new friends as one of their big concerns. You don’t need to be a behavioural psychologist to understand that plenty of the thrill in novelty comes from the excitement of uncertainty, but when so much of the wider economic value of student lifestyle comes from their leisure spending – is this hesitancy a concern for the industries which rely on it?

Eating out and alcohol make up the chief ‘fun money’ component of a student’s budget. And this year they’re spending £52 per week on those activities, compared to £60 last year. It’s a 15% drop which, adjusted for 8.8% inflation, is more like a real world reduction of 22%. The pragmatic approach of Gen Z means that this is where the sacrifice is coming from, because, by the same measure, overall net spend is only down 14%.

For businesses now competing over a smaller share of the pie, there are solutions – but they lie beyond the transactional. Experiential marketing has skyrocketed in adoption and has driven sales for plenty of Gen Z focussed brands – like Bumble’s pop-up events or Ellesse’s live shoppable concert. By offering something different, they’ve been able to continue their growth outside of the everyday confines of sales.

And with almost 80% of students concerned about making their bank balances stretch, it’s this creativity and innovation which is going to deliver value for both sides.

University has always been a tale of two halves. But where the challenge might once have been a simple choice between lectures and life outside the classroom, this time it’s about balancing the bank to maintain that rounded experience.

Figure 16. Q: Are there any parts of university life are you concerned about? Please select all that apply. Respondents: 1,030

But university can be a challenging time

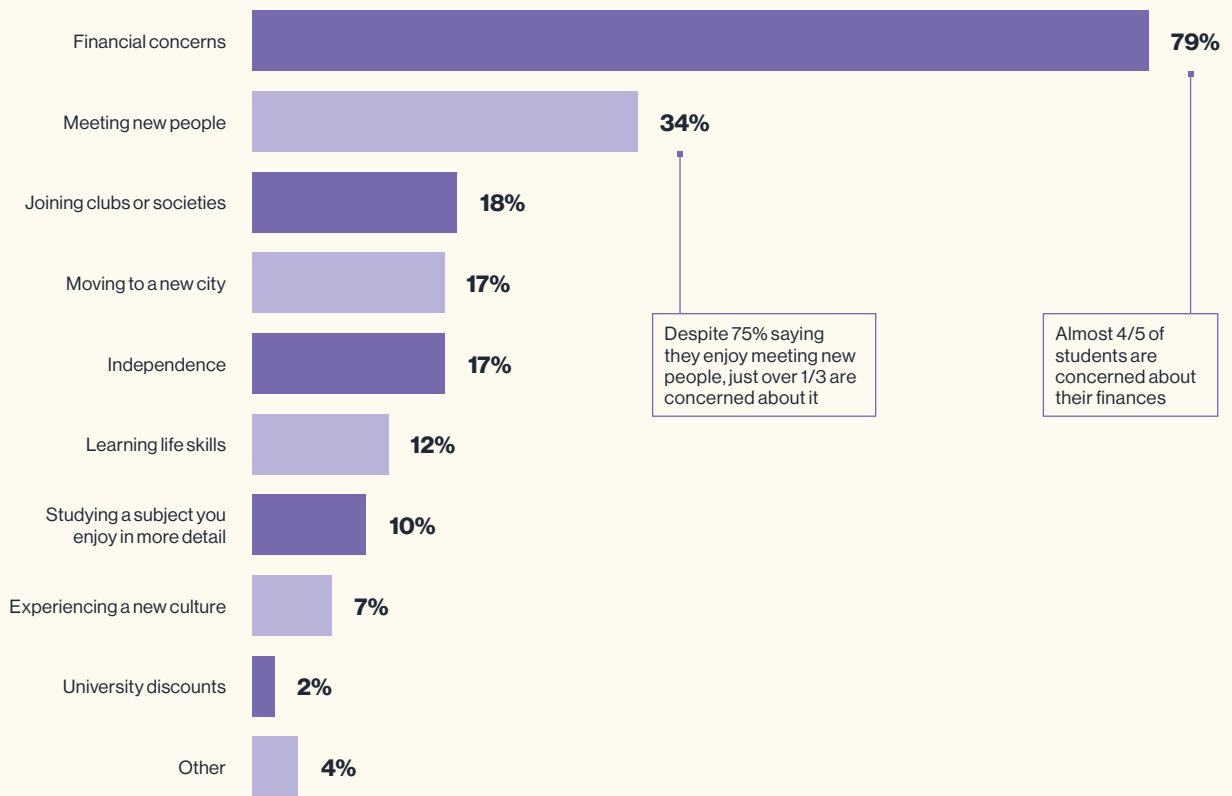
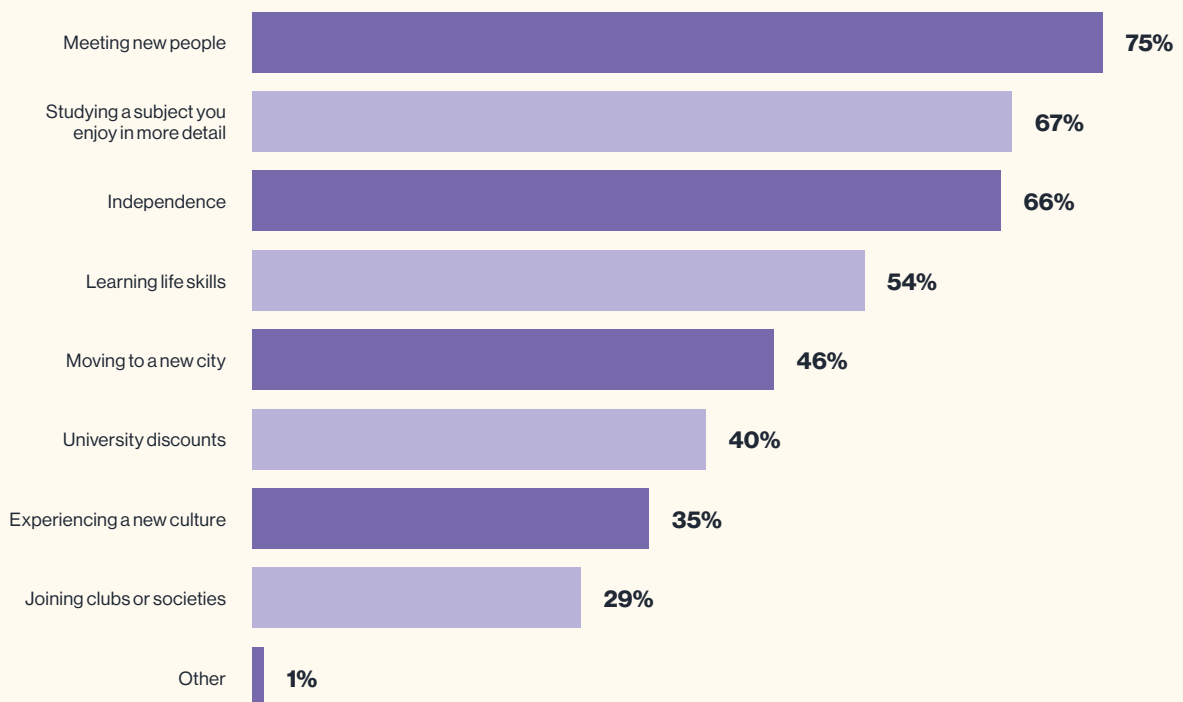


Figure 17. Q: Which parts of university life are you enjoying? Please tick all that apply. Respondents: 1,166

There are social and educational benefits to university attendance





Come Payday, the Course Comes First

Students might see bigger challenges ahead than their grades, but that doesn't mean they're neglecting their investment in their education.

Like any promising stock – the more you put in, the more you get out. And that's exactly what they're doing when it comes to spreading their spending. The course is coming first.

Whether through student loans, savings, or earnings – 71% of this year's freshers spent money on stationery ahead of lectures, whilst 62% spent on books and study materials. That's more than they spent on new clothes, homeware, or travel cards.

The only anomaly is printers. Back in 2020 printers were the second biggest 'miss' when it came to students arriving on campus and wishing they'd bought one. In 2022 they dropped to fourth and only 10% of students bought one. But this isn't really an anomaly of academic spending, it's a simple sign of the times. In a world of Apple Pencils, handwriting recognition, and smart notebooks – printers may well be on the fast road to obsolescence.

But whether it's for printers or kitchen plates, one thing unites all of the products. When it comes to hearing about discounts, somehow email continues to reign supreme, decades after its advent. 69% of students prefer it for

finding out about sales. App notifications and text messages are up there too, with 28% each, suggesting that a more direct (and personalised) dialogue is the way to convert. Instagram, the most popular social media choice on the list, is preferred by only 38% – almost half that of email.

Direct, personalised, private messages = best for advertising sales and discounts.

Social media and other open channels = best for visibility and brand engagement.

And whilst course materials get the investment before term starts, once lectures are up and running then the categories in week-to-week spending flip. The fun budget kicks in – with £76 spent on eating out, takeaways, and alcohol, and lifestyle buys become important – with £66 spent on clothes and homeware each week. Books and study materials get £31 per week.

Pre-uni purchases and term start dates = more money spent on the course.

Everyday spending during term time = more money spent on the lifestyle.

Figure 18. Q: Which of the following did you buy for university?

The course comes first, with stationery and course materials coming up as the most purchased items

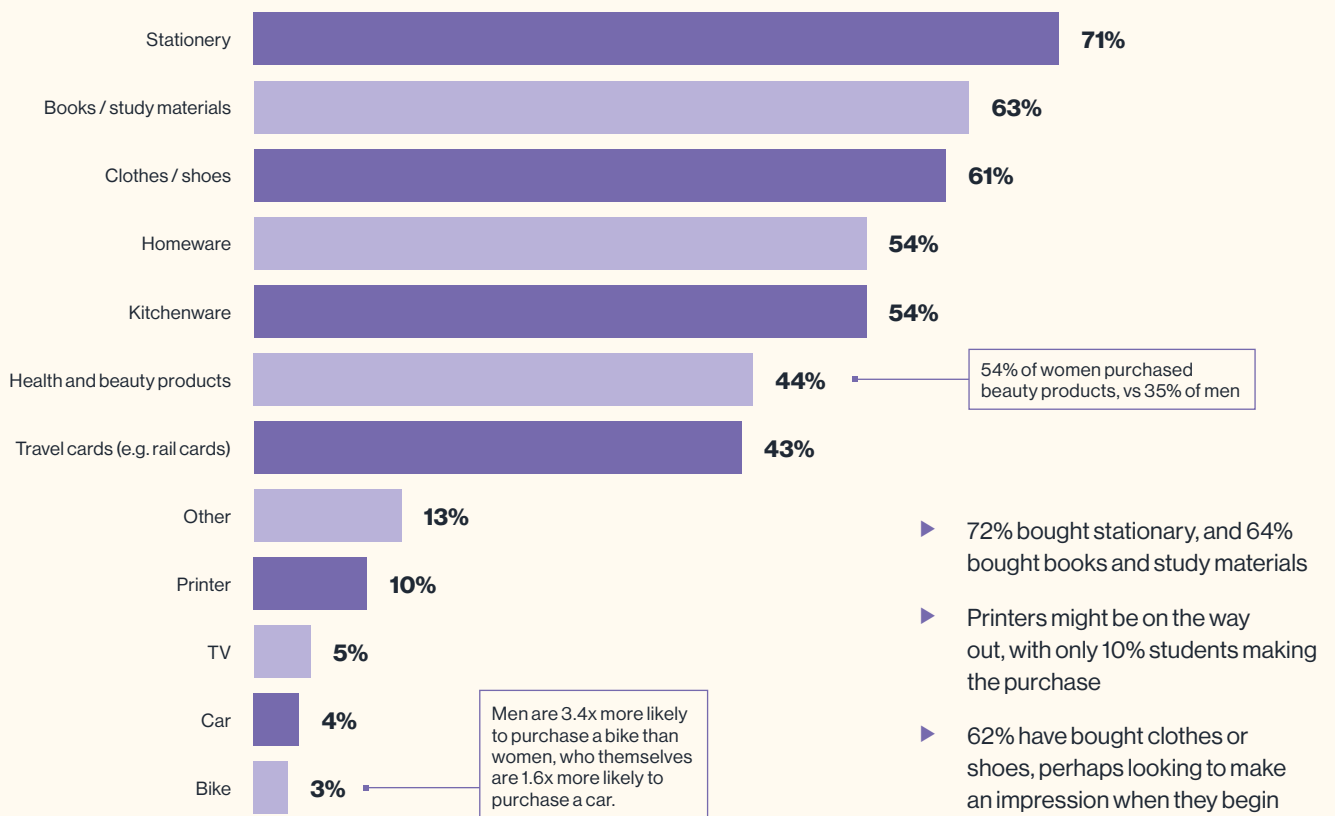
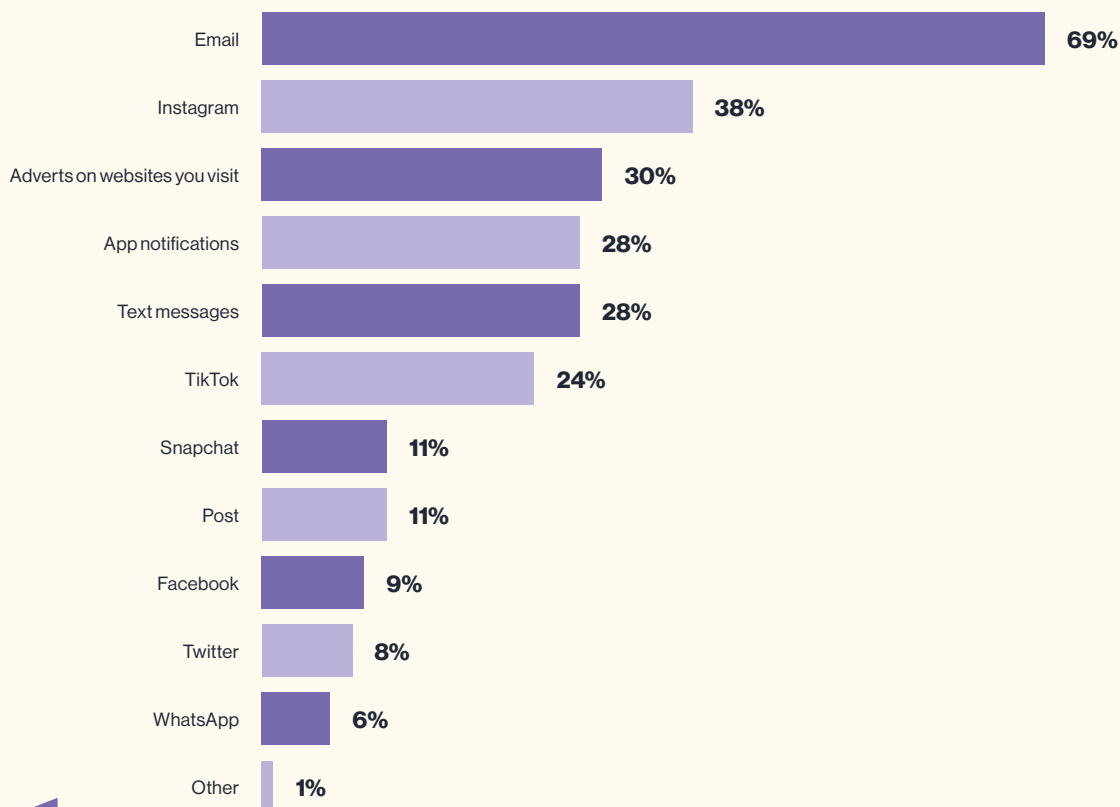


Figure 19.

Direct contact via email is the leading way students would like to hear about discounts, but social media is a key place for visibility



Chapter Three

Media & Social



Introduction

Legal & Security

When you're working with young people, trust is key.

This internet-born generation are more naturally fluent with sales and marketing tactics than even the experts in the industry. They haven't had to adapt to advertising or develop a filter to determine the underlying message of marketing – they've grown up being bombarded with it and they understand it intuitively.

That's why words and phrases like authenticity, genuine, and real-life are becoming so ubiquitous. That's why microinfluencers, using their iPhones to review products in their bedrooms, are becoming a reputable source of information. To those of us over 30 and 40, it can look amateur. To those who are 18, 19, and 20 – it's real.

More students trust UCAS with their personal data than they do their bank. Our positive reputation, and consistent conversations with them, means they see us – in terms of trustworthiness – on par with the NHS and ahead of the BBC.

It's a privilege to have their trust and it's something that's always front of mind when I'm working with partners and customers to advise them on their propositions and campaigns. The students and young people who trust us do so because they know we only work with relevant, reputable brands which can offer positive choices.

This comes into play on social media most of all. The decentralised nature of it means trust is generally lower, or at least reservations are higher. It's the brands putting out that authentic, genuine, real-world content that are the most successful. By choosing the right partners, we can confidently co-opt them and publish co-branded options with our creative guidance and within our circle of trust.

With the sands of social media changing and the industry going through its own identity crisis, as you'll read shortly, having the right partnerships has never been more important to maintain your relevance and trust.



Nicola McClymont
Customer Success Director,
Technology & Finance, UCAS



Stream, Subscribe Survive

There were few industries more suited to benefit from a global pandemic than streaming.

During a global mandate to stay home, Netflix and Amazon Prime were almost mandatory 'must-haves' and their subscriptions skyrocketed. Even Disney+ nudged itself into the duopoly, despite launching only a couple of months prior.

Cultural phenomena were born in this mini golden age of streaming too – which we can now uniquely place in a COVID timeline: Tiger King to distract us through our first lockdown, Emily in Paris to round off the year, and the long-awaited final season of Money Heist to coincide with the country's long-awaited reopening.

And whilst those were all wildly successful Netflix titles, and in 2023 the giant still retains its traditional top spot in student preference, it's fallen for the first time. Crackdowns on account sharing, the introduction of advertising, more competition and, of course, the increased cost-of-living, means that it's fallen sharply – from 83% to 74%.

Amazon Prime too, from 59% to 52%, meaning Disney+ is the only real winner, rising to a 49% share.

But with all three major providers raising their prices in 2022, more than half of this year's students are now relying on their parents to pay for their subscriptions. Female students are more likely to have their memberships paid by parents – although whether this continues

for any gender, as stricter controls on sharing accounts across households are introduced, remains to be seen.

It may not matter, because whoever's paying for them, subscriptions are being cancelled across the board. Free of lockdowns and the restrictions of the pandemic, and with an added pressure to cut costs, subscriptions of all types are falling. Fashion, food and drink, health and beauty, ebook, and audiobook services all lost student subscribers in 2022. This is a nationwide trend that reaches far outside the student market, as UK households cancelled 2 million memberships¹ during 2022.

The more mobile and versatile music market has held its own though. Spotify, the even more monopolous version of Netflix in the audio arena, largely stood firm – as 49% of students kept their accounts (down from 50%.) Podcasts dodged the downward trend too, and then some, with 43% of students tuning in compared to 25% last year. It certainly helps that they're free.

Outside of music, a response is clearly needed. Netflix is the only major streaming service to introduce an ad-powered cheaper price in an attempt to convince users to keep their subscription whilst funds are tight. But at the cost of coming with adverts, and at the same time as measures to restrict account sharing, it hasn't worked in the UK just yet. Are we going to see a different tack from Amazon and Disney, and are the likes of Graze (food), Ipsy (beauty), or Stitch Fix (fashion) going to bow to budget boxes?

¹ <https://www.theguardian.com/media/2023/jan/30/uk-homes-cancelled-2m-streaming-services-cost-of-living-netflix>

Figure 20. Q: Which of the following entertainment services, if any, do you use? Please tick all that apply. Respondents 1,035.

Netflix leads in home entertainment services, but Amazon and Disney+ are strong contenders

- ▶ 74% have a Netflix subscription, slightly higher for women at 82%
- ▶ POLAR Q1+2 are MORE likely to have Netflix than Q4+5
- ▶ A popular 'other' service was YouTube

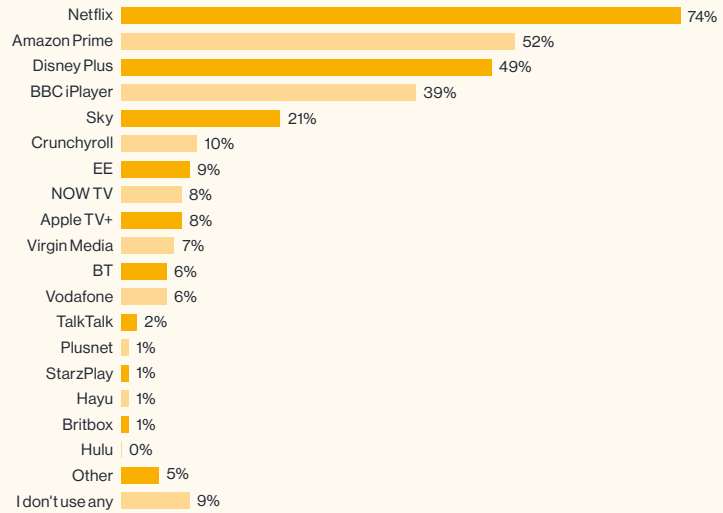


Figure 21. Q: Which of the following entertainment services, if any, do you use? Please tick all that apply. Respondents 1,035.

Disney+ has had a huge rise for this age group, and may have contributed to falling Netflix and Amazon Prime Video subscriptions

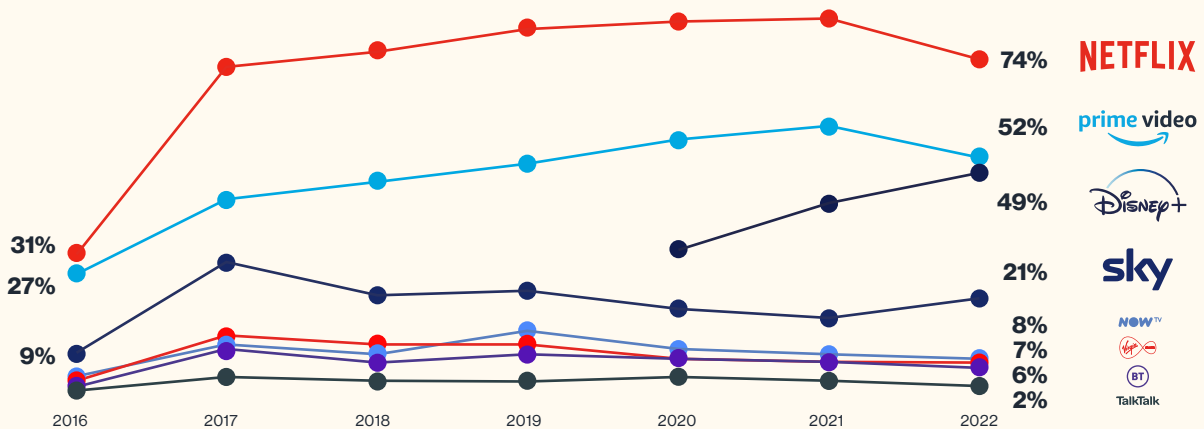
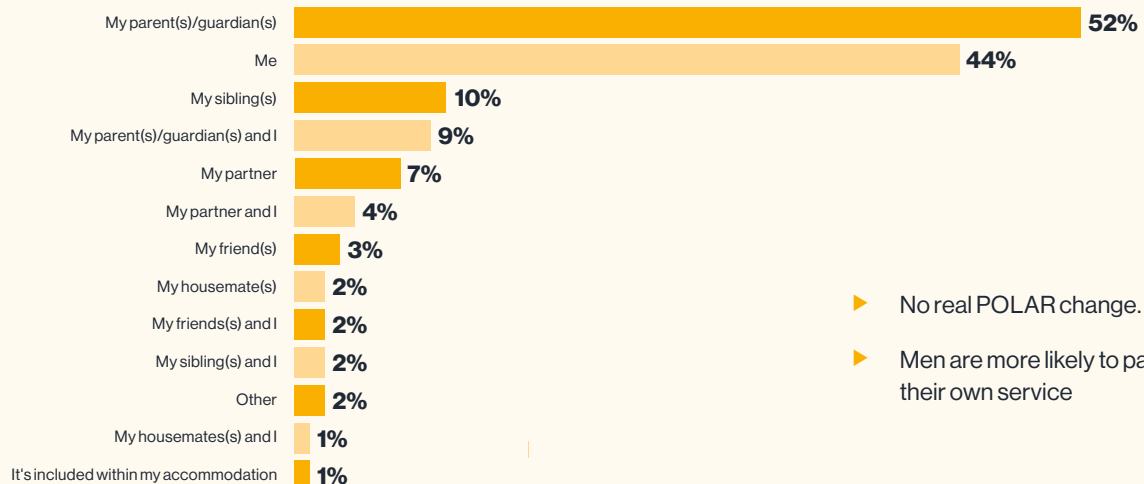


Figure 22. Q: Who pays for the entertainment service(s)? Please select all that apply. Respondents: 958.

Most are relying on parents to cover at least one streaming service, but almost half are also paying for a service themselves



- ▶ No real POLAR change.
- ▶ Men are more likely to pay for their own service

Figure 23. Respondents: 958

Men are most likely to pay for at least one of their own services, and these tend to be related to more specific services (Crunchyroll, BT for sport)

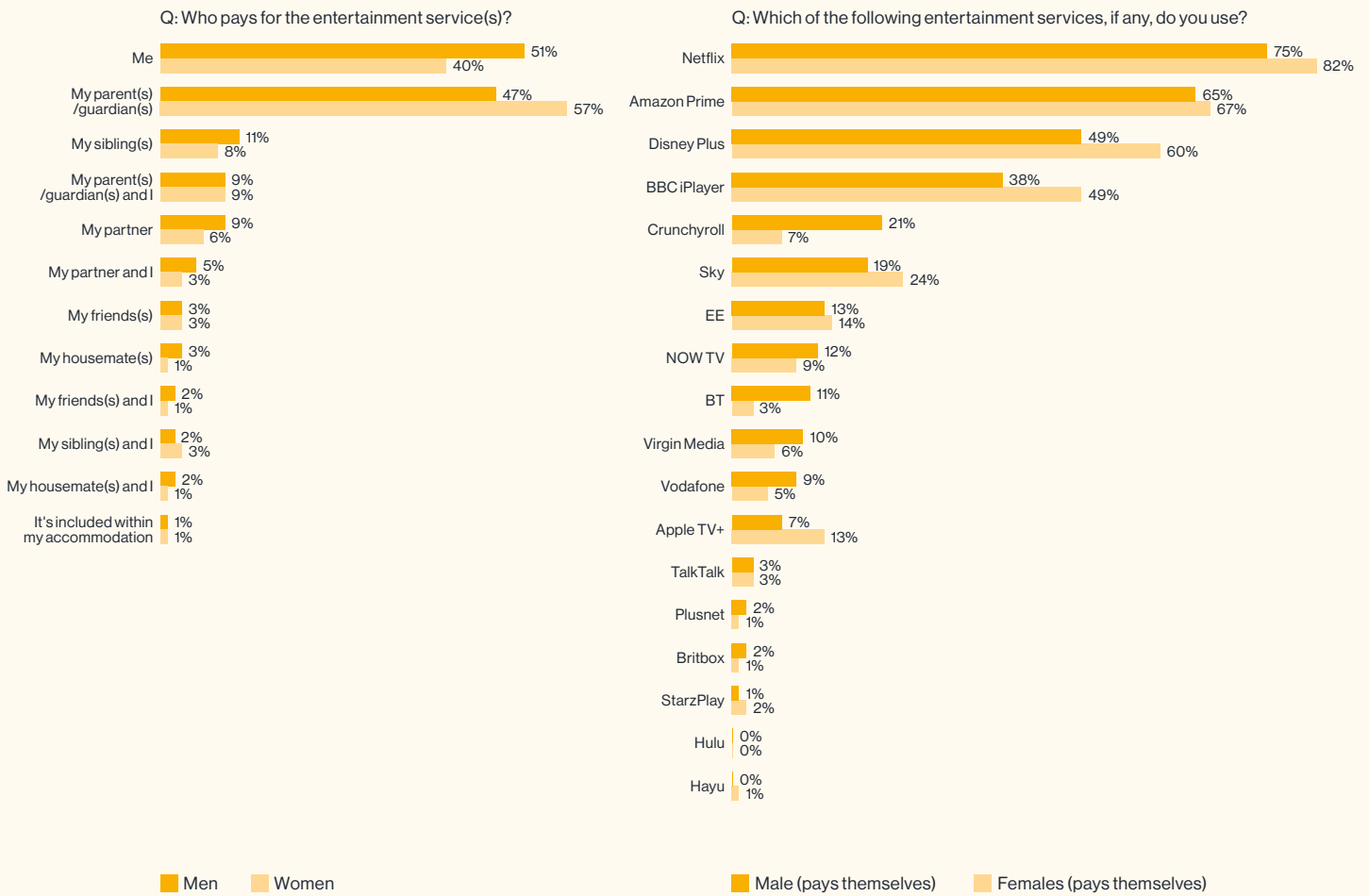
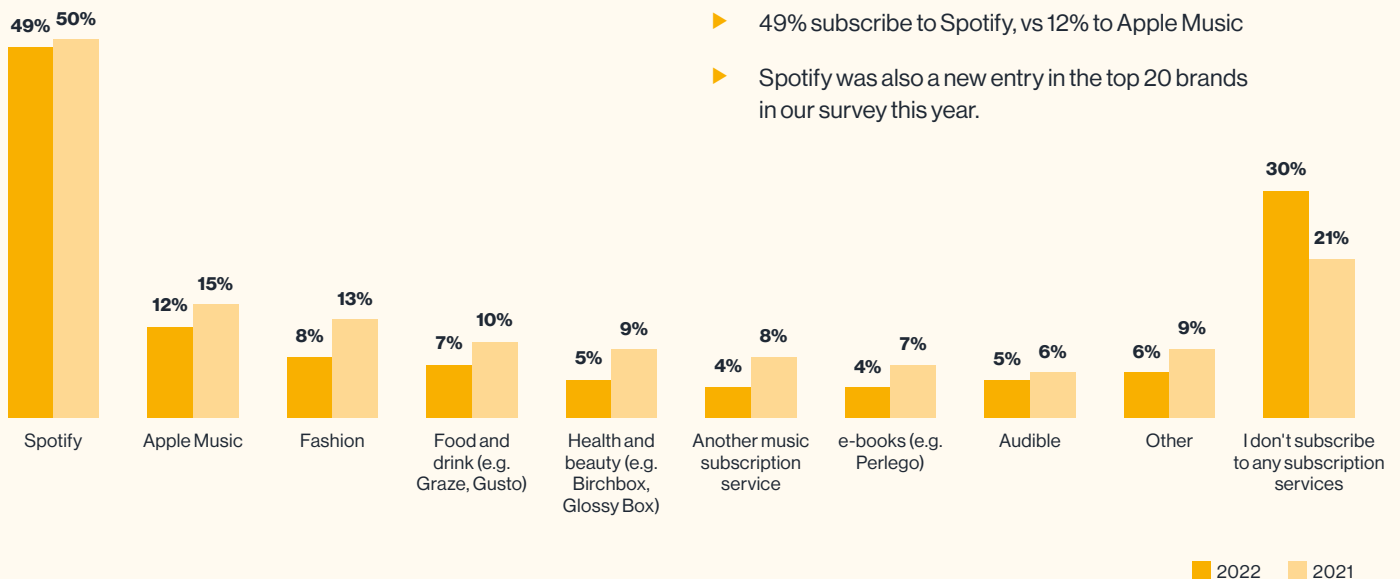


Figure 24. Q: Which of the following subscription services, if any, do you subscribe to? Please select all that apply. Respondents: 1,035

Spotify is the most popular other subscription service, far ahead of Apple Music





Antisocial Media

Continuing a now long standing trend, Facebook's fall from grace is showing no signs of deceleration. Back in 2016, 86% of students were active on the platform but today, only 40% use it regularly. Its Messenger app has suffered a similar fate, falling by the same rate as its parent, but much more quickly, at 50% less usage in just the last 2 years.

Twitter has always been a stable bet, with around a third of students using it regularly every year, but we're expecting that to change for the first time in 2024. Tumultuous new ownership and rumours of poor treatment of staff is surely set to turn this generation of ethically and morally driven users away.

TikTok, the undisputed champion of the pandemic, hasn't lost any market share but it has seen a steep fall in growth. Rising from 41% to 53% between 2020 and 2021, it crept up to just 55% this year. We may be seeing its saturation point – which won't have been helped by the politically charged conversations taking place in both the US and UK about the company's origins.

And even BeReal looked all set to be a post-pandemic behemoth, as it gained huge traction during mid-2022. It prompts users to post an unfiltered photo, using both their front and rear cameras to showcase themselves and their daily lives authentically, and only once a day. Users are given 2 minutes to post once they get the notification, which is designed to discourage the carefully planned and practised posting of other platforms. But whilst its daily active users climbed rapidly to 20 million in October 2022², it's already fallen to half of that. When it comes to students, only 21% of them use it regularly – making it the least used social media platform and, potentially, a flash in the pan.

There are winners, though, too. Instagram, YouTube, WhatsApp, and Snapchat have all held their places or continued their growth – at 82%, 79%, 77%, and 66% respectively. On campus, this seems to be the essential combo.

But in a once explosive industry which, this year defined more by loss than gain, what's changed?

Almost ¾ of all freshers have given up at least one of their major platforms too, mainly because they've become a 'mental health burden.'

The other big justifications were too much advertising, concerns about privacy, and too much misleading information. It's interesting, then, that Instagram, Twitter, Facebook, and TikTok were all cited in the top ten most trusted media outlets for news – whilst simultaneously being in the top ten most distrusted.

There's also a growing trend, across both freshers and the wider Gen Z community, to choose social media platforms which offer more privacy and control. Facebook's public wall could be part of its fall, and WhatsApps encryption and 1-2-1 nature might explain its consistent popularity. Discord, too, is becoming more widely used and niche channels like Vero lead with USPs like "ad-free and algorithm-free." Instagram's recent experiments with hiding the number of likes certainly supports this move towards a more private and personal experience, with less metric-obsession, and more authentic connections.

The pursuit of more trust, more realism, and more control over personal information is certainly a positive one. But for brands looking to engage with students who are operating in increasingly closed circles, it heralds a new age of marketing.

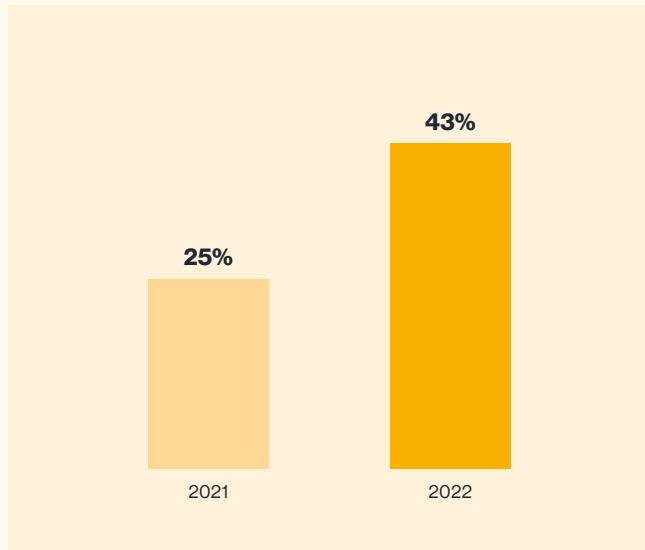
² <https://www.businessofapps.com/data/bereal-statistics/>

Figure 25. Respondents: 1,172.

Podcasts have high uptake amongst this group. This over indexes by 200 vs all adults in the UK*

Q: Do you listen to podcasts in your spare time? (Answer: YES)

Top reasons they listen to their favourite podcasts (grouped)



- 1 Entertaining/funny
- 2 Informative/educational
- 3 Interesting
- 4 They talk about a hobby or topic that I'm interested in
- 5 Relatable

*Source: RAJAR MIDAS survey Summer 22

Figure 26.

All news sources vary in levels of trust, and the inclusion of social media sites show their effectiveness as a source of information

Top ten trusted media outlets:

- | | | | |
|---|--------------|----|---------------|
| 1 | | 6 | |
| 2 | Instagram | 7 | Google |
| 3 | The Guardian | 8 | TikTok |
| 4 | sky | 9 | itv |
| 5 | | 10 | The Telegraph |
| | | | |

Top ten distrusted media outlets:

- | | | | |
|---|------------|----|--------------|
| 1 | | 6 | TikTok |
| 2 | | 7 | |
| 3 | Daily Mail | 8 | BBC |
| 4 | Instagram | 9 | Mirror |
| 5 | | 10 | The Guardian |

Figure 27. Which social media sites or apps do you use regularly? Please tick all that apply.

Facebook has seen a dramatic decrease in use, whilst Instagram has taken the top spot, and TikTok is used by over half in just two years

▶ Just 1% say they don't use any social media

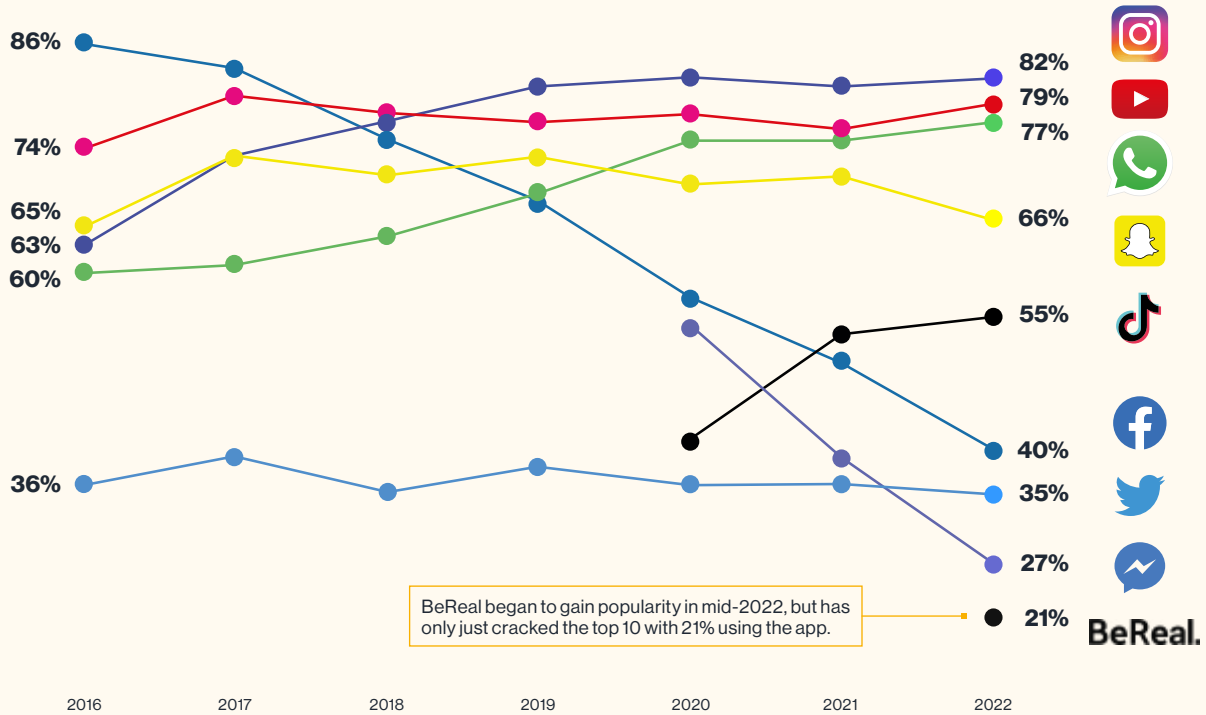
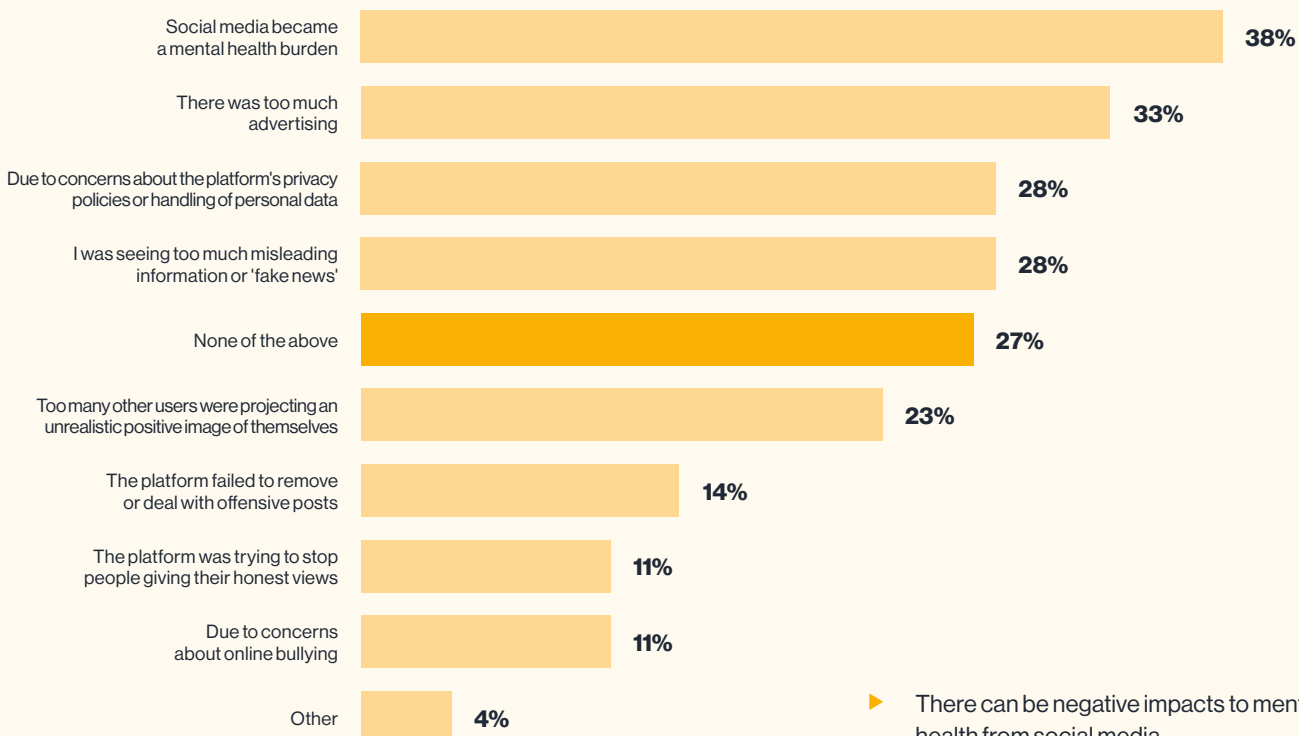


Figure 28. Q: Have you ever decided to not use or to stop using a particular social media platform for any of the following reasons? Please select all that apply.

Almost ¾ have given up at least one social media platform due to a concern of some type



Chapter Four

Brands



Introduction

Student Lifestyle

When it comes to why some brands become firm favourites, and why some fall away, the reasons are often reflective of the world off-campus.

During the pandemic, when there was more time to reflect and less pressure to purchase, students chose based on personal values. During an increase in the cost of living, price and quality now take precedence.

And the recurring theme of restraint is as present in brand preference as it has been in our first three chapters.

But perhaps surprisingly, given that students are looking to spend their money more wisely, they're putting less stock in customer reviews this year. Either they are looking for endorsement elsewhere or other's opinions matter less. Could this be a sign that influencer endorsement is nudging out peer endorsement? There certainly seems to be a correlation between their favourite brands and the brands putting their faith in influencer marketing.

And whilst personal values might have been put to one side for now, students are still 'breaking up' with the biggest offenders. They haven't lost sight of what's good, bad, right, and wrong for them – so we, and brands, need to continue speaking the right language if they want them to listen.

UCAS is here to bring choice to young people throughout their journey – wherever they are in it and whatever's going on in the world. We're also here to help brands showcase themselves with the correct narrative.

Students have a voracious appetite for discovery. So by bringing both our aims together, we want to introduce students to brands which offer positive choices, mirror their personal values, and are relevant, useful, and helpful to them in today's world.



Lavina Chainani
Customer Success Director,
Student Lifestyle, UCAS



The Suspension of Ethical Purchasing

The strange, still years of the pandemic were melting pots for a new type of consumer.

Several movements coincided to create a new public psyche, especially in the youth, which in turn created a miniature counter-culture. Ripple effects spread out across the supply chain during 2020.

BLM led to the championing of black-owned businesses, over the fast and easy giants like Amazon. Exposés of fast fashion warehouses, many of which continued to operate during lockdowns, led to the boycotting of Boohoo and PrettyLittleThing. And the handlings of furloughs and sackings led to the likes of Wetherspoons and Sports Direct coming under heavy public scrutiny from a new conscious student shopper.

This continued into 2021 with minimal change. A percentage down here and there, as the world reopened and people rushed back to the high street, but on the whole the trend was stoic.

But now, as the cost of living starts to tell, students are putting their ethical purchasing to one side as they focus on making their money go further. Instinct tells us it's temporary, but that doesn't mean it's insignificant:

- ▶ 15% fewer are avoiding companies because of non-recyclable packaging
- ▶ 10% fewer are avoiding brands because of reports of animal testing
- ▶ 5% fewer are avoiding employers because of underpaid workers
- ▶ 4% fewer are avoiding businesses because of staff conditions.

It may be that there's been a worldwide response and companies are committing fewer of these practices, but it seems more likely that the ability to choose certain sellers is a difficult privilege during a cost of living increase.

There's no reason to suggest that brands are going to get off lightly from now on, though. When normal service resumes, we expect students to return to their morally-charged selective purchasing. This brief respite is an unexpected, but perhaps very welcome, opportunity for brands to get their house in order – whilst consumer priorities are elsewhere.

(Shein is a persistent example of this student struggle between ethics and economics. It's the most 'broken up with' brand this year, as it was last year, and it's cited 3x more than any other. But at the same time, it's in the top 20 favourite student brands (again) and it's even climbed 5 places this year.)

Figure 29. Q: Have you ever decided to not purchase an item you were interested in because of a company's policies on any of the following? Respondents 730.

This year they are less socially conscious, with numbers down across all our policy factors

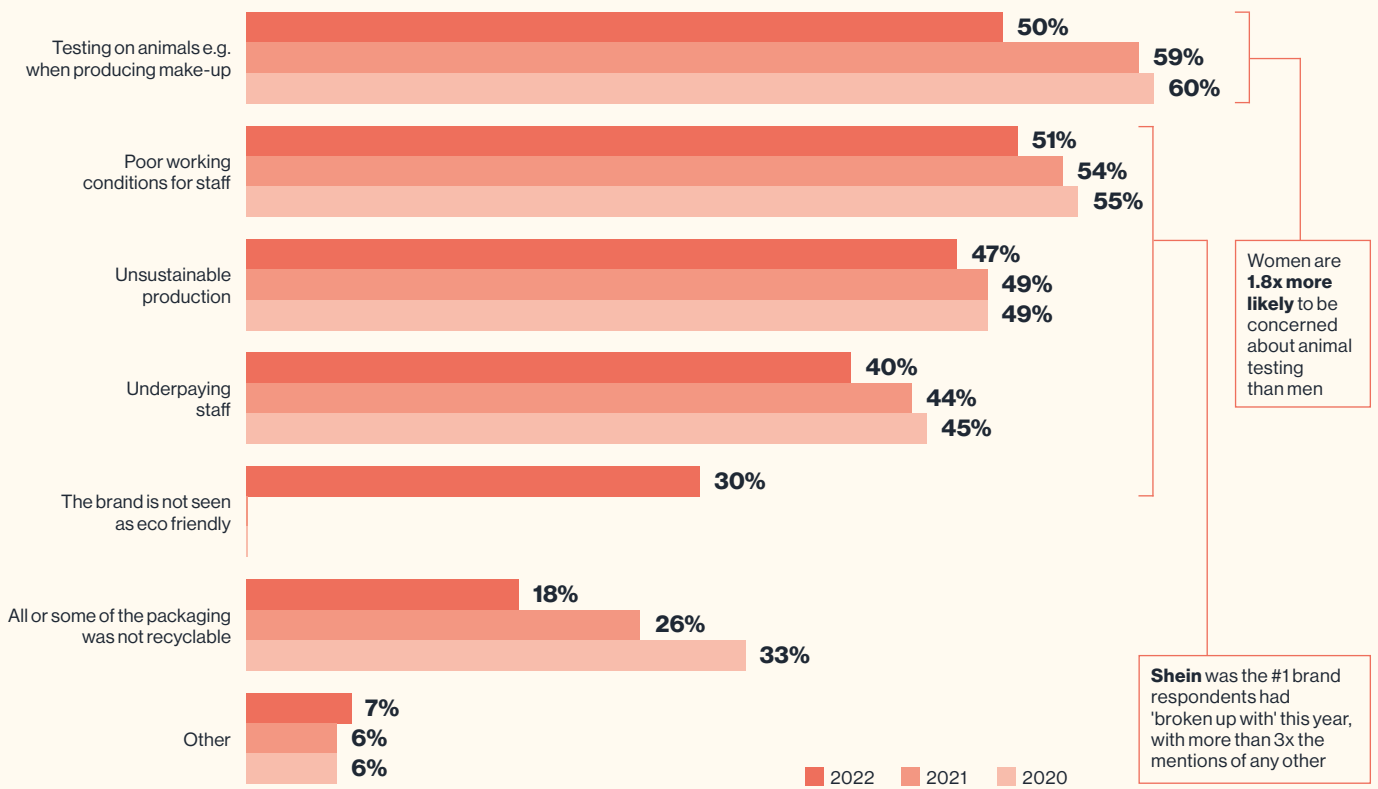
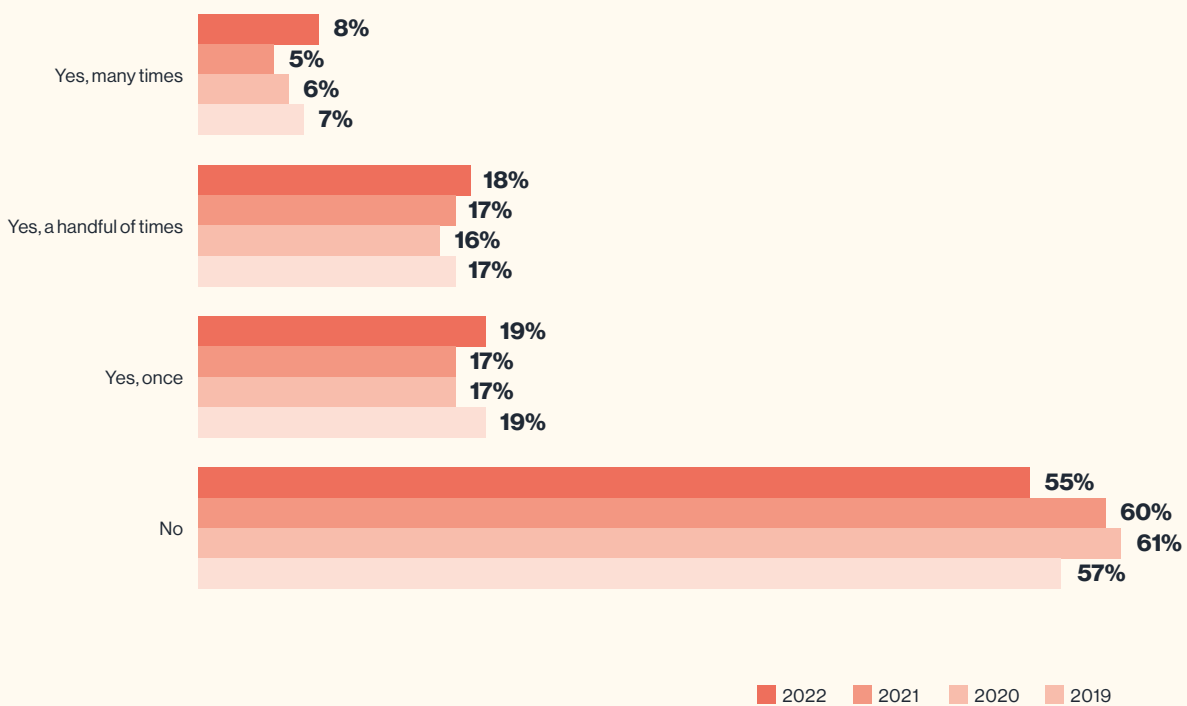


Figure 30. Q: Have you ever bought a product that an influencer has endorsed? Respondents: 992.

Influencers can help brands push their products



For brands looking to repair their reputations, or even for those unaffected but simply looking to enhance theirs, influencer marketing is more, well, influential than ever. It may hold the key. Students are buying more of their endorsed products and almost half told us that they've been persuaded to purchase by an influencer – their favourites being Molly Mae, The Sidemen, Grace Barry, and Markiplier (each of whom have their own product lines.)

Although with the recent trend of deinfluencing, which dispels myths around viral products on social media, it will be interesting to see if influencers still hold the same sway in 2023. The trend attempts to bring more authentic brand product reviews to avoid unnecessary spending by consumers – a timely and welcome change as

the pursestrings get tighter – and one in keeping with what students want from their products.

Because cost and quality are the most important factors when they're deciding whether to buy. Both are bigger factors than they were last year. Both are key to longer lasting purchases. And both are essential in avoiding having to spend twice.

If brands, influencers, and retailers can all get on board – students may have an easier road ahead.



Figure 31. Q: Who, if anyone, is your favourite influencer? By an influencer, we mean an individual with a large social media presence who may encourage you to buy a certain product. Respondents: 585.

Top 5 most mentioned influencers



Figure 32. Q: Thinking about your favourite brands (as chosen in the question above), what are the main factors that make you think positively of them? Respondents: 1,027.

Students say that product quality is most important, but cost is a strong influence in their favourite brand choices

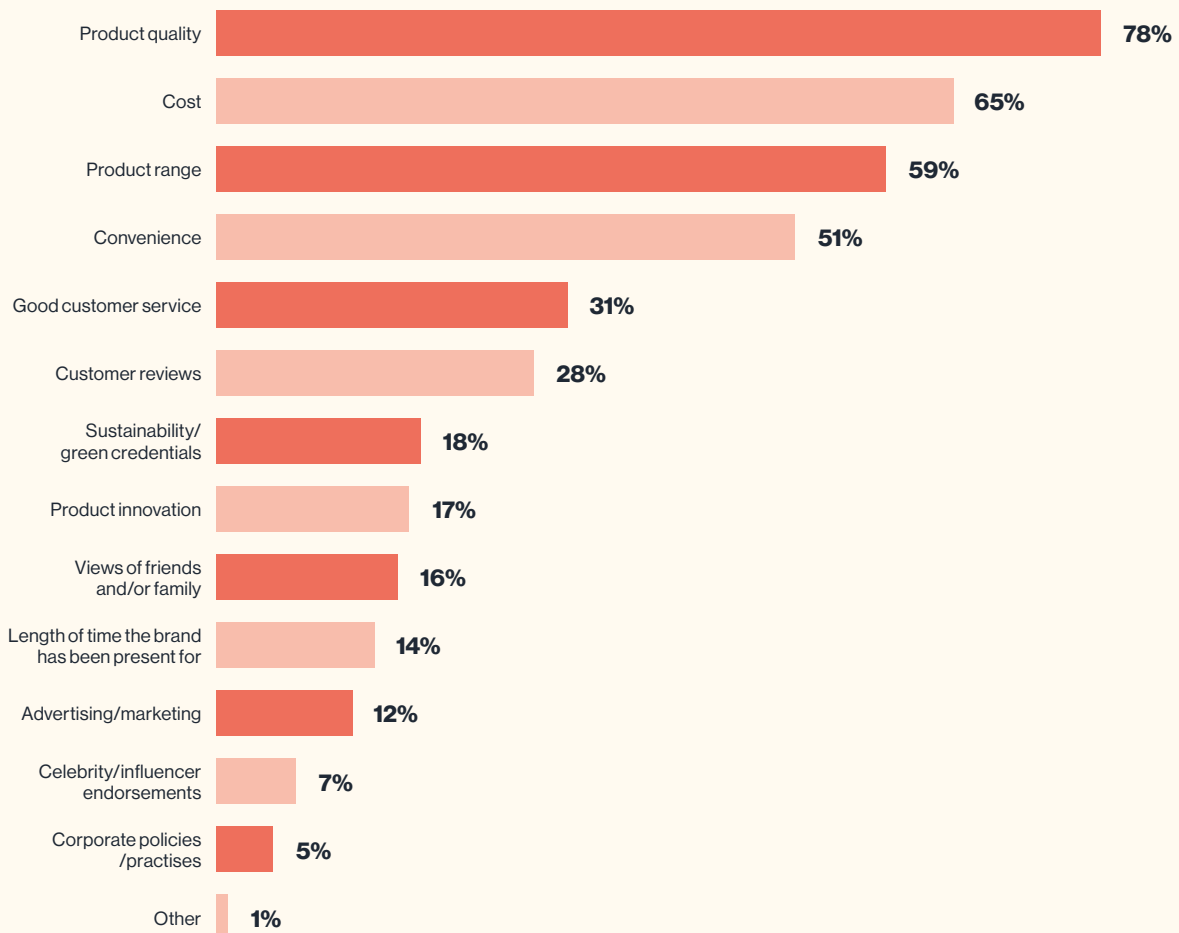
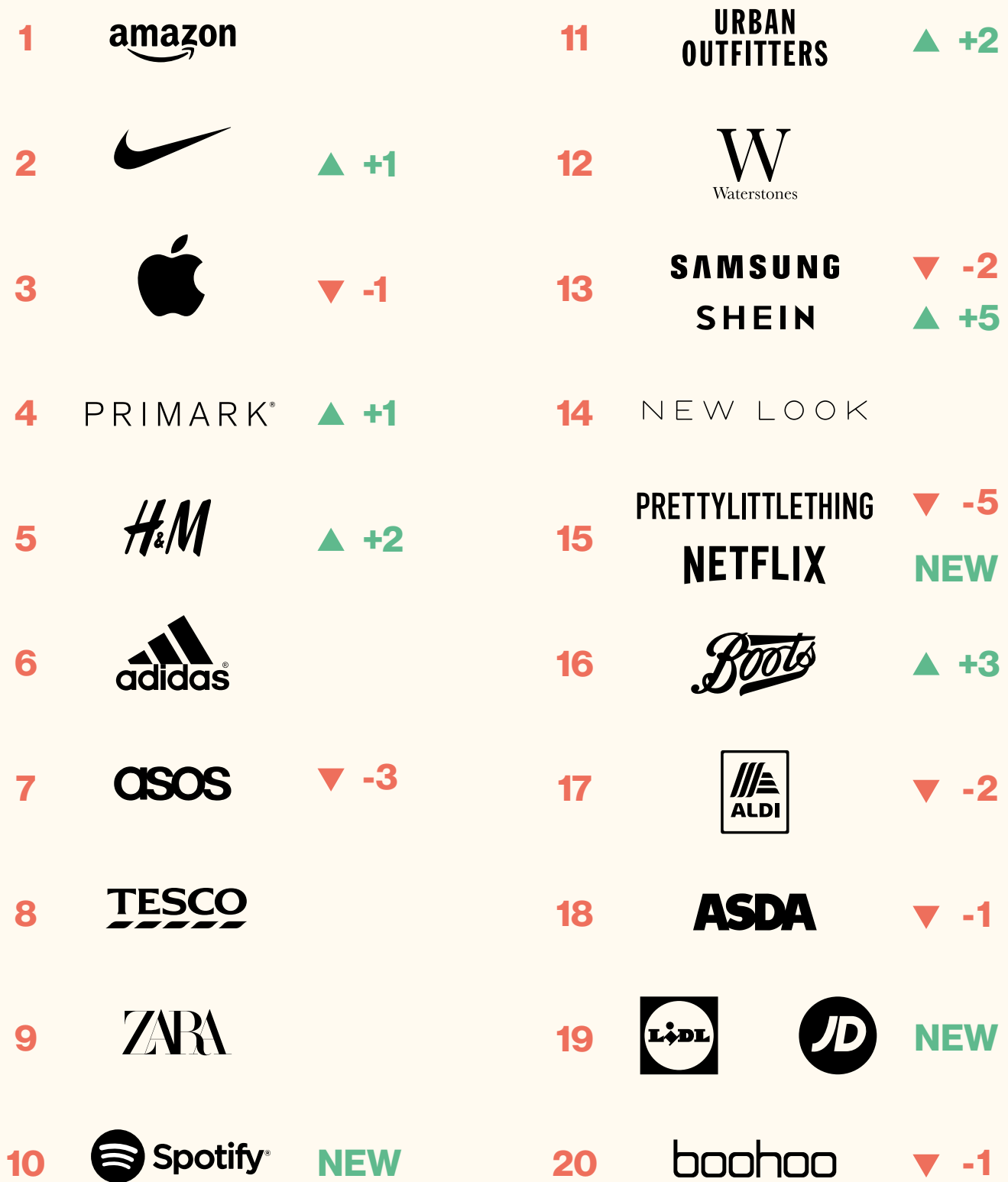


Figure 33. Q: What are your top five favourite brands in general? Respondents: 846.

Top brands remain very similar year on year

► SHEIN moving up +5 places shows that not all students are as concerned by ethical issues, whilst Spotify was a new entry, which we see reflected in subscription use data



Chapter Five

The New Normal



Introduction

Banking, Finance, Insurance

It's been a turbulent few years in higher education. So we'd be understating things if we said that the return of normality across the sector was like a big breath of fresh air.

And yes, the long tail impacts of COVID and the cost of living challenge have created a different shade of normality – but it's one that students are getting on board with.

We're seeing first-hand the increased appetite for young people to get into higher education, with unexpected benefits like distance learning driving interest from across the globe and giving universities a very welcome boost to international recruitment.

Domestically, you might assume that plenty of students are choosing to live at home and take advantage of the short (cheap) commutes and virtual lectures – and you'd be right. But the number returning to campus after COVID is rising too, and the demand for student accommodation is also so huge that many first years are having to start searching for second year digs as early as October. This means earlier demand for financial and insurance products, as they look to secure deposits and protection in irregular periods that banks and other providers need to be aware of.

The combination of decreased spending power and an unexpected earlier need for cash means new sales and marketing timelines in the student financial market. Are you ready for the rush?

Pre-COVID, huge volumes of students would descend on campus and take advantage of what their institutions had to offer. And now that the pandemic is slowly but surely becoming a thing of the past, students are back, and in their droves!



Ollie Wells
Customer Success Director,
Real Estate, UCAS



New Normal, New Mindset.

The fundamental model of higher education changed during COVID.

Its core components – bustling campuses, packed lecture halls, in-person academic debates – were all replaced by necessary, yet often surprisingly effective, digital versions.

And whilst some of those temporary measures actually ended up improving the experience and look set to stick around, like remote learning and virtual open days, in many ways the sector was waiting for an opportunity to get back to how things were.

Like how most lectures (72%) have now reverted to the in-person model, or how students living away from home are able to visit their family and friends as often as they did pre-pandemic.

The new normal is looking quite a bit like the old normal.

Satisfaction levels are back too. COVID didn't interrupt rising levels of contentment (which reflect the rising investment) in facilities and halls. Students are the happiest they've ever been on that front.¹ The biggest drop is in student support, which likely reflects more demand rather than less provision.

Undergraduate numbers rose too.² Admittedly a little less steeply than the last pre-pandemic intake, but rise they did.

But the old normal certainly didn't have 25% of students learning in a hybrid model. We weren't tracking remote learning in 2019, but online lectures were a rarity in the academic calendar.

Now, with a quarter of students attending at least a quarter of their lectures online, the difference might not be that noticeable on campus but it has certainly changed student life.

For better, and for worse.

Because the challenge going forward is going to be utilising the positives of the pandemic, like remote learning to enable borderless higher education, with the sense of belonging that is so paramount to the university experience. Campuses are, by and large, the busy and bustling places that they were in 2019 and, by and large, this is a welcome comeback.

Some things are hard to replicate online. Nuanced conversations, body language, and the unique subtleties of small workshops are intrinsic to quality learning – but as the sector becomes more inclusive and better caters to groups like caregivers, there's a balance to be struck. The technology and the precedent now exists to level the playing field and remove many of the disadvantages in the system.

The good news for now is that most traditional UK undergraduates are now getting the experience that they signed up for and dreamt of.

The good news coming into play is that higher education changed a lot during the pandemic. Much of it for the better. And drawing out those positives is a project well underway, this isn't going to be a sector that didn't learn its lesson.

¹ <https://wonkhe.com/blogs/are-students-asking-for-the-new-normal-the-old-normal-or-something-else-entirely/>

² <https://www.hesa.ac.uk/data-and-analysis/students/whos-in-he>



Figure 34. Q: What proportion of your lectures are currently online? Respondents: 1,169.

Most lectures are back to being fully in person, but some are working to a hybrid model

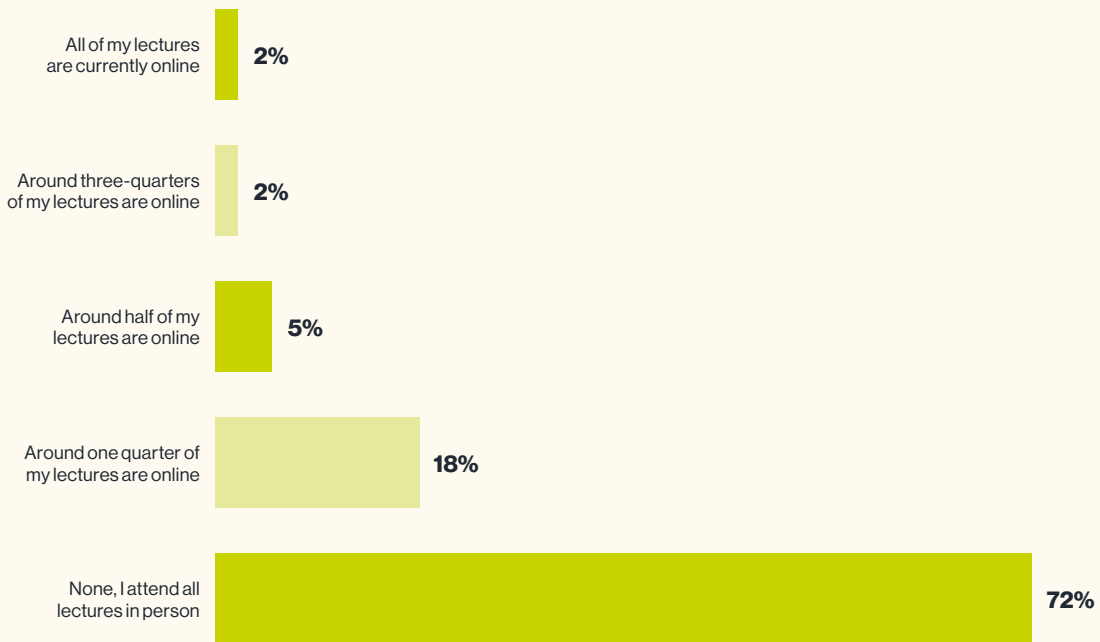
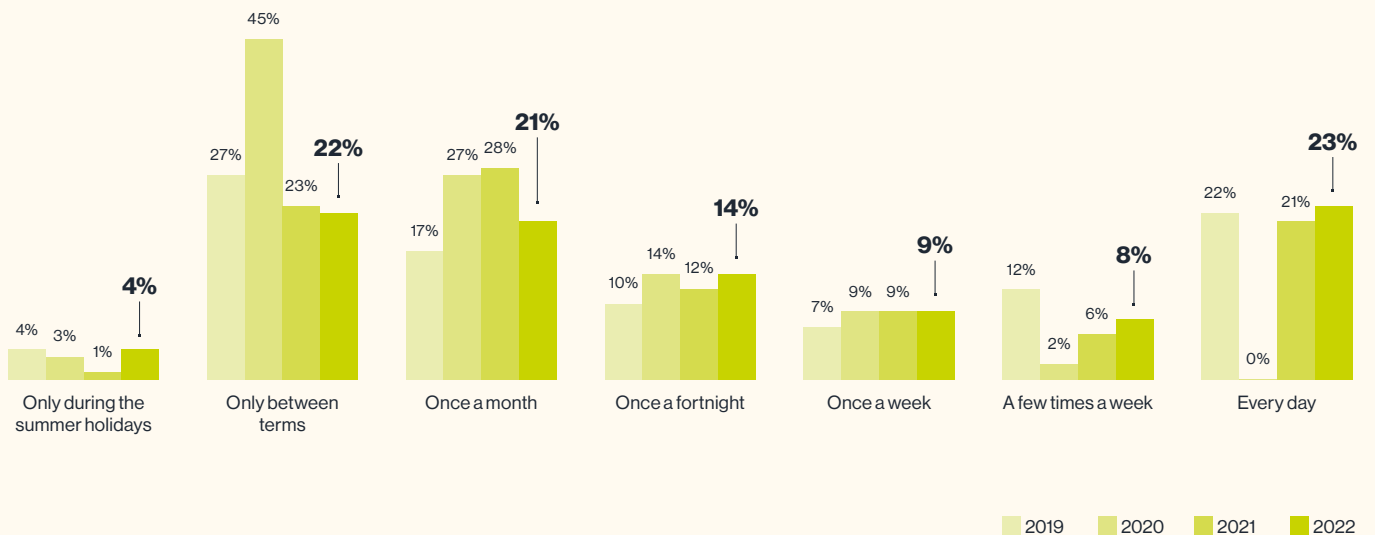


Figure 35. Q: How often do you visit home? (Excludes 'other' and those that live at home). Respondents: 763.

Students are getting closer to normality after 2020 reduced contact frequency with their homes



Chapter Six

Tech



Introduction

Computing, Science, & Tech

Whilst we're still in the COVID orbit, where current students are arriving on campus with the impacts of the pandemic fresh in their thoughts, it's important to consider things in context. When it comes to impact, technology – and the way that students use it – has been one of the most affected. Its role in work, study, and socialising has changed for good – in every sense of the word.

Today's students rely on their tech to attend lectures, access resources, take notes, collaborate in lessons, submit assignments, and plenty more. They've never been more dependent on it, so having the right devices has never been more important either.

For the brands and retailers which supply them, it's key that they position themselves as key components of the learning experience – whilst also understanding the limited spending power that many students will be feeling. Engaging as early as possible in the cycle, to ensure they reach their market during key buying windows, now looks more like starting in January than in June.

Brands must also think about the ways they can win long term loyalty from this audience, by supporting them during a life-changing time where they need a little help – like discounts, added value accessories, or free cloud storage.

This is a tech-savvy and value-conscious audience, who are looking for a differentiator to make their decision easier.

Students also tend to be at the cutting edge of technology and are traditionally early adopters, so it will be fascinating to see how they navigate – and hopefully benefit from – 5G, virtual and augmented reality, artificial intelligence, machine learning and the Internet of Things. The brands and retailers which stand out in these emerging markets – and which offer greater value and experiences – are likely to win customers for life.



Tristan Luton
Customer Success Director,
Public Sector, UCAS



Smartphones: Sacred, Sacrosanct.

More first year students now own smartphones than UK homes have internet access¹.

Having one has pretty much become a non-negotiable of life at university. But keeping up with the Joneses, and with the demands of their own digital nativeness, means students have smartphones long before they get to campus. In fact, in the UK, 65% have one by 11 years old². And by the time term starts, it's up to 98%.

It's one of the few ubiquitous tech traits that brands can rely on to unite such a disparate group like students. Fewer of them own their own laptop or computer, and fewer still have a tablet – but both of these products are bought more often, specifically for uni, than smartphones are. Tablets are, in fact, the fastest growing purchase of the three. No surprises for guessing which brand is leading the way.

Apple leads Samsung, its nearest competition, by almost 70% in tablet purchases. It's closer with smartphones, but there's still a 40% (and growing) gap. It's not quite a monopoly, but it's not far off.

Tablet usage has always been an interesting one when it comes to students. Starting out life as a luxury product, halfway between the must-have duo of laptop and smartphone, they were predominantly used for streaming in 2019. And whilst that's still their most popular function, the tablet's role in learning has become more pronounced in recent years. Use of them for note taking, email, and reading has risen significantly – leading to a fifth consecutive year of purchase growth among first year students.

But it will be more interesting still, to see how tablets fare as students tighten their purse strings. There's little argument to call them an essential purchase in the way that smartphones and laptops are. But, when it comes to tech, it's about much more than just the cost of buying one. In fact, smartphones are such a mandatory buy that even a 23% (£126) price hike (since 2019) has done nothing to dent their almost universal ownership. Samsung phones, despite being 39% (£307) cheaper, still can't dent Apple's lead. In perhaps the only example of its kind, price simply doesn't matter.

But that doesn't mean that students aren't price-sensitive in tech, far from it. It simply means that these ubiquitous purchases are going to happen, regardless of the high price of purchase. But for the brands and retailers who can find ways to be more affordable, or to offer added value where discounts aren't viable, there's a chance to stand out in a homogenous marketplace. The move towards phygital experiences, where students browse in-store then check-out online, is growing. 40% of them are actively searching for offers and 29% are waiting to find one before they buy³.

As we move towards the 23/24 intake, timing is going to be everything.

¹ <https://www.ibisworld.com/uk/bed/percentage-of-households-with-internet-access/2717/>

² <https://yougov.co.uk/topics/society/articles-reports/2020/03/13/what-age-do-kids-get-phones-tablet-laptops->

³ https://4000540.fs1.hubspotusercontent-na1.net/hubfs/4000540/UNIDAYS_TechReport_2022.pdf

Figure 36. Q: Did you purchase any of the following items specifically for university? Respondents: 1,189

A laptop or computer is the most common tech purchase, but a smartphone is almost ubiquitous

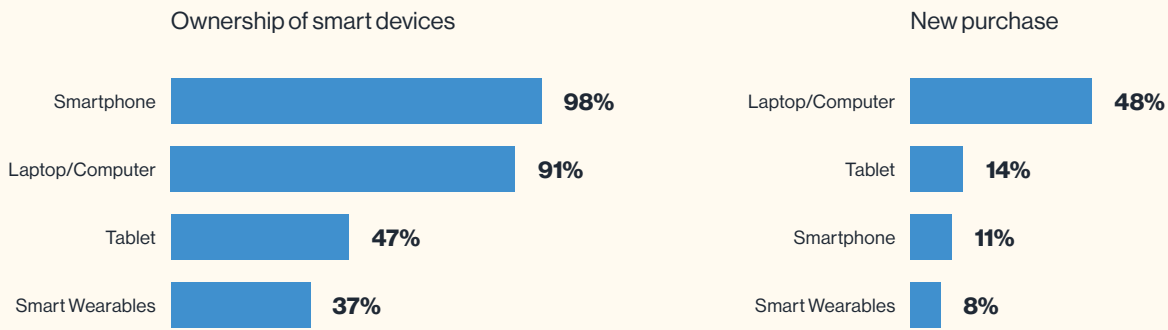


Figure 37. Q: Did you purchase any of the following items specifically for university? Respondents: 1,189

Whilst smartphone and laptop purchases have remained steady, tablets are increasing in purchase popularity

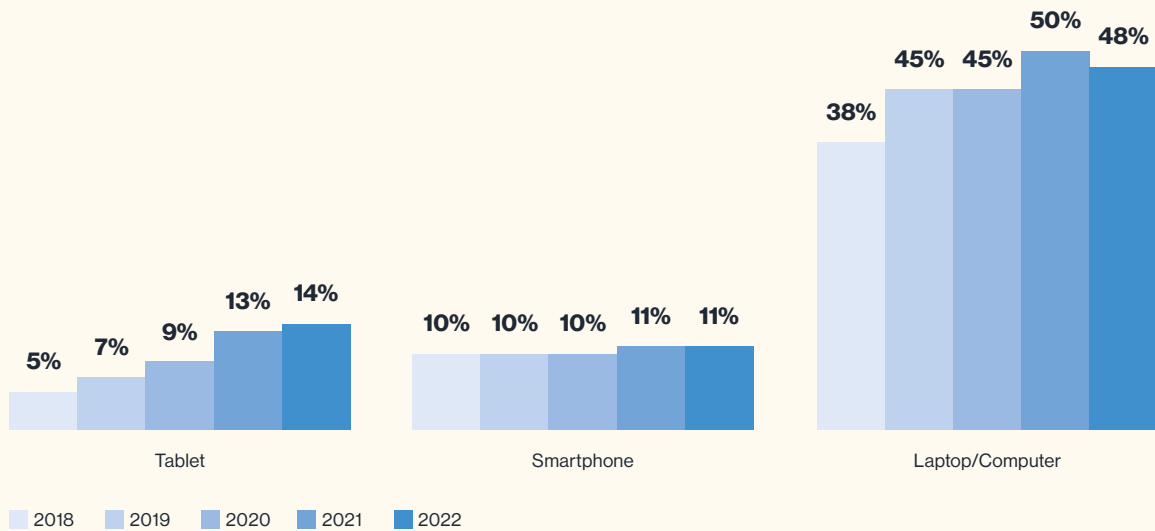


Figure 38.

The most popular tablet by far is an iPad, although costs decreased in 2022

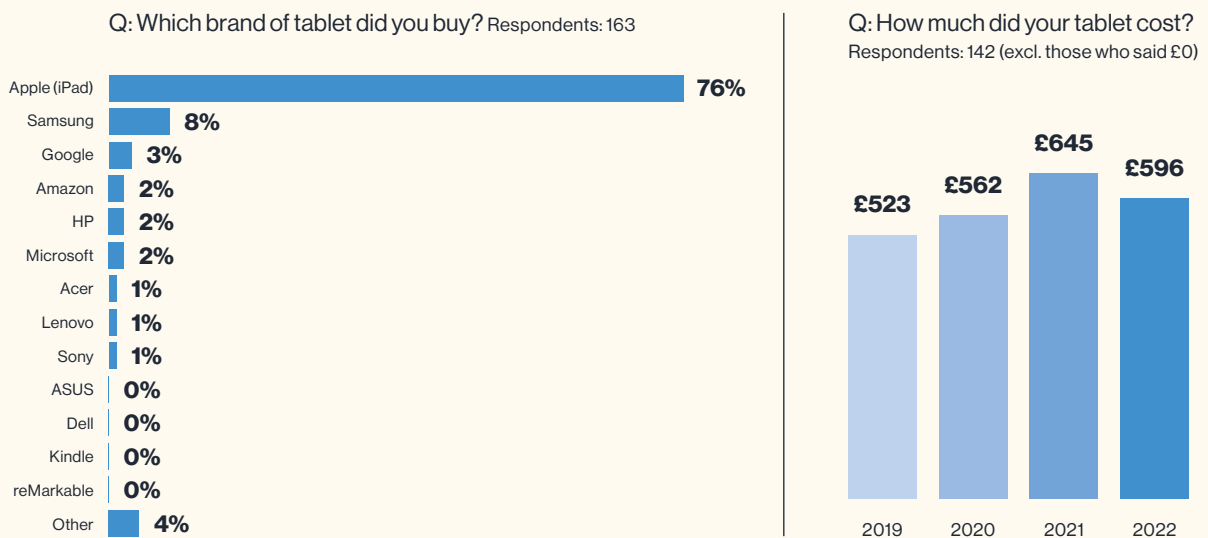




Figure 39. Q: Which of the following activities do you use a tablet for? Respondents: 1,165

Tablets are no longer just for consuming media, with notetaking and email on the rise

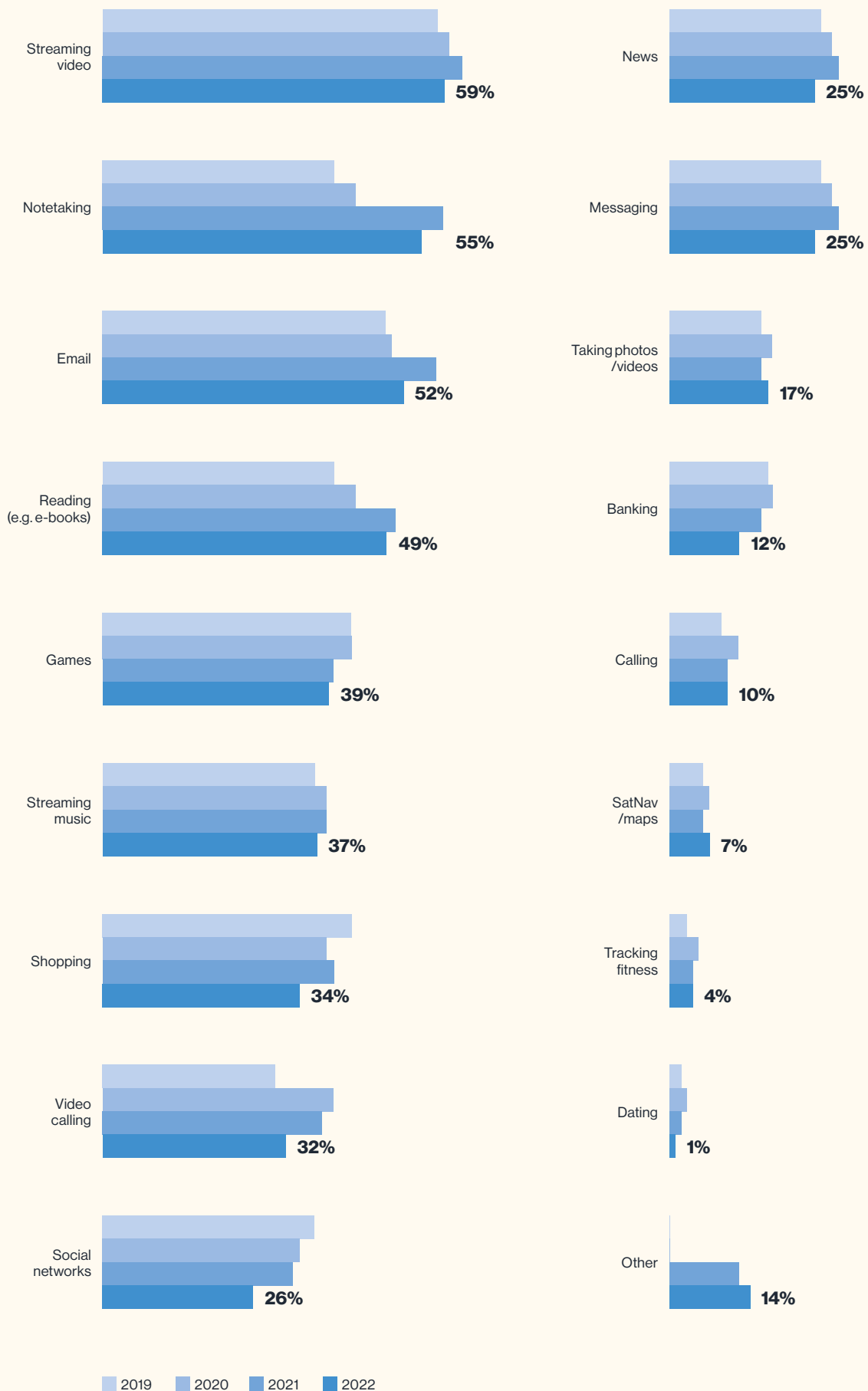
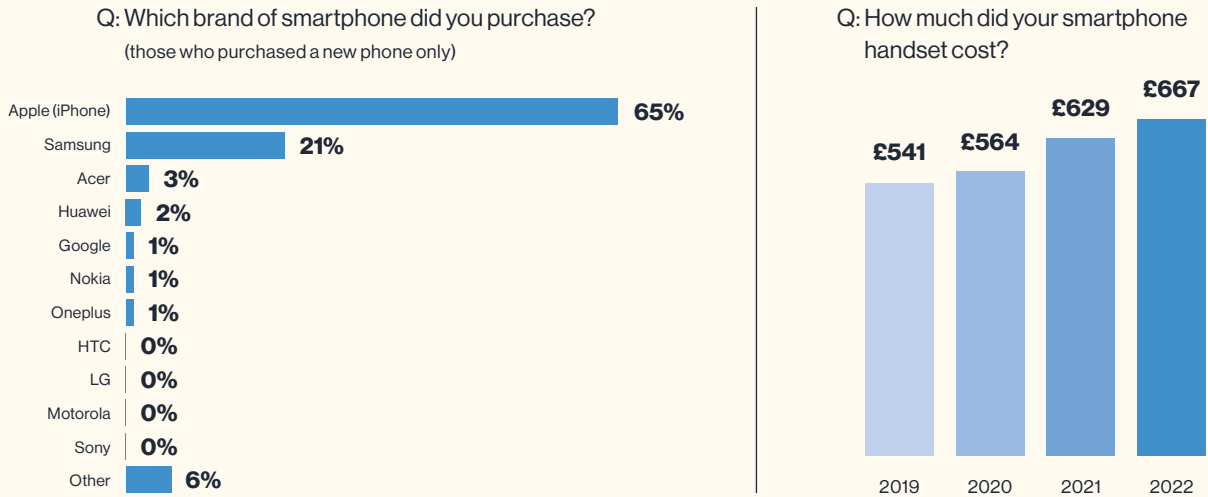


Figure 40. Respondents: 129

Apple also have a dominant lead above the other smartphone brands



- ▶ Almost 2/3 purchased an iPhone, whilst Samsung is the next most popular at 22%
- ▶ These are two of the most expensive phone brands, and may have contributed to rising spend

Figure 41. Q: Which brand of smartphone did you purchase? (those who purchased a new phone only). Respondents: 129

The gap between Samsung and Apple is increasing, despite Samsung gaining in popularity

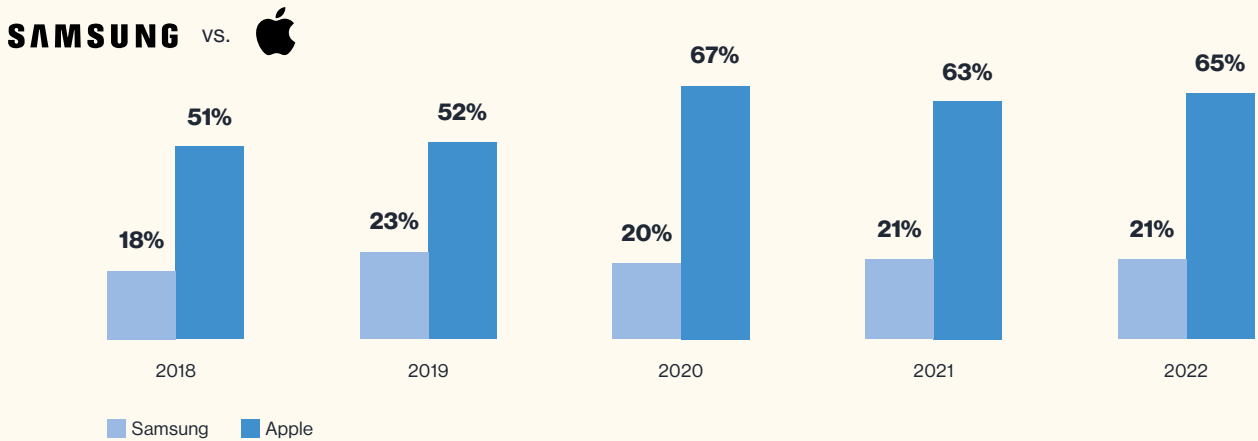
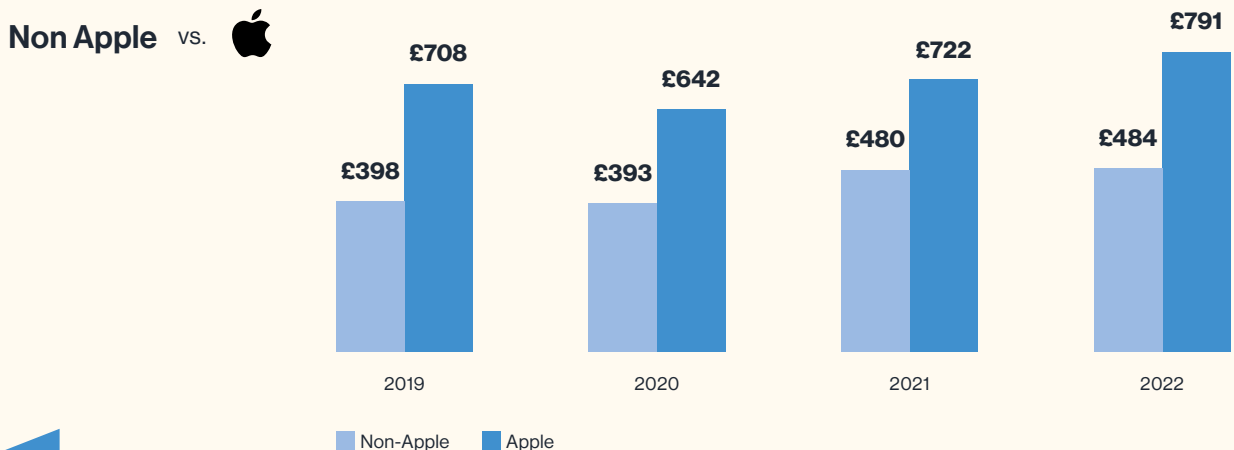


Figure 42. Smartphone spend. Respondents: 104

Apple products have contributed the most to the rising price of smartphones





By Any Means Necessary

Students are enterprising and entrepreneurial, that much is clear from our findings this year.

So it's no surprise that, despite rising costs, they're finding new ways to keep up their old habits when it comes to tech.

More first years have SIM only deals (26%) than ever, which usually means they're sticking with their current smartphone for longer. And fewer have monthly contracts (58%), which are usually much more expensive because they include paying off an expensive new handset. Apple, the most popular provider, charges an average of almost £800 per handset, which is a lot to pay off without those monthly instalments.

That gap (between the cheaper flexibility of SIM-only plans and the pricier fixed monthly plans) has shrunk by 10% since 2019. It's a trend spilling over into the choice of network provider, too. The big four (EE, 3, Vodafone, O2) have seen their market share drop from 68% to 57% since 2019, whilst the smaller and often cheaper networks (like Tesco, BT, and VOXI) have been growing over that time. These 'piggyback' providers, which pay to use the networks of their larger competitors, can pass on the cost savings to their customers because they don't need to recoup the costs of running any pylons or masts. There's no real downside, so they're particularly attractive to money-savvy students.

When it comes to the phones themselves, fewer students are buying brand new this year (-3%) and more are opting for second-hand (+2%) or refurbished (+1%) versions. It's these pre-loved handsets which are commonly used for SIM-only deals, with students paying an average of £25 per month for their mobile phones, compared to the average £47.20 monthly plan⁴ for the rest of the UK.

A few more parents are chipping in to help pay for handsets, but the rising cost of living is affecting them too. Parents are funding their children's laptops and wearables less than smartphones, perhaps because they're not as immediately useful as a way of keeping in touch. When it comes to laptops, the gap between parents and students paying was 11% in 2019. Today, it's 23%. Students are increasingly having to find the cash themselves.

And given that more of them than ever are still waiting to buy something they need, with laptops/computers and tablets being some of the most in-demand items, the tech market is far from closed at this stage of the year.

⁴ <https://www.thisismoney.co.uk/money/bills/article-9732797/Popular-mobile-phones-cost-200-2018-contract-payments-increasing-8-month.html>

Figure 43. Q: What type of phone plan are you on? Respondents: 1,167

SIM only plans are increasing in uptake, rising to a high of 26% this year, whilst monthly contracts fell to a low of 58%

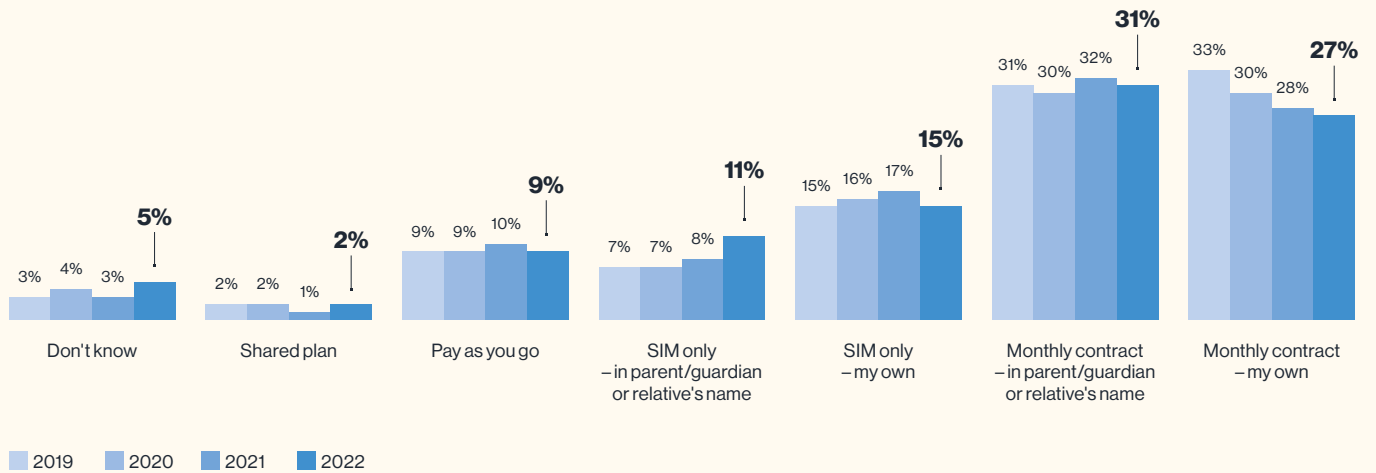
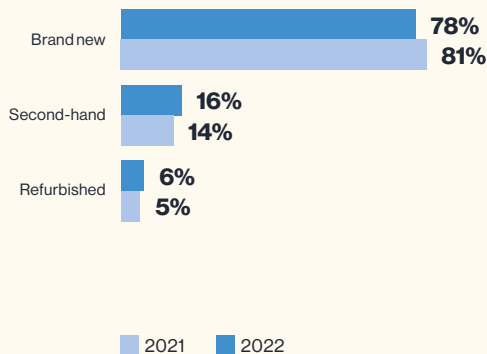


Figure 44. Respondents: 128

There was a slight shift towards buying second hand, but students themselves still bear the brunt of the costs

Q: What type of smartphone did you purchase?



Q: How much did your smartphone handset cost?

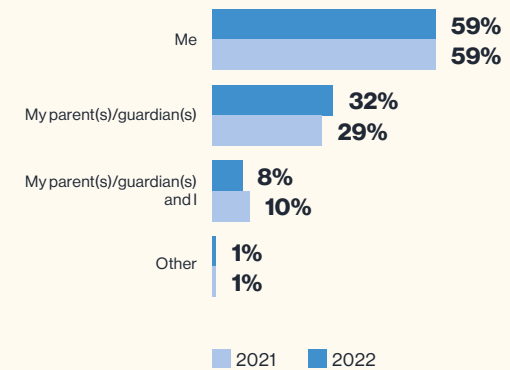


Figure 45.

Students spend an average of £25pm, and tend to be committed to a long term contract

Q: How long is your mobile phone contract in months?
Respondents: 646

21 months

- ▶ Average length of a mobile phone contract (for those on a monthly contract only)

Q: How much do you pay for your phone each month?
Respondents: 1,014

£25

38% say the price of their contract has gone up since the pandemic

- ▶ Average spend per month on a mobile phone

Figure 46. Q: What phone network are you currently on? Respondents: 1,167

The ‘big four’ network providers have decreased from 68% share in 2019 to 57% in 2022

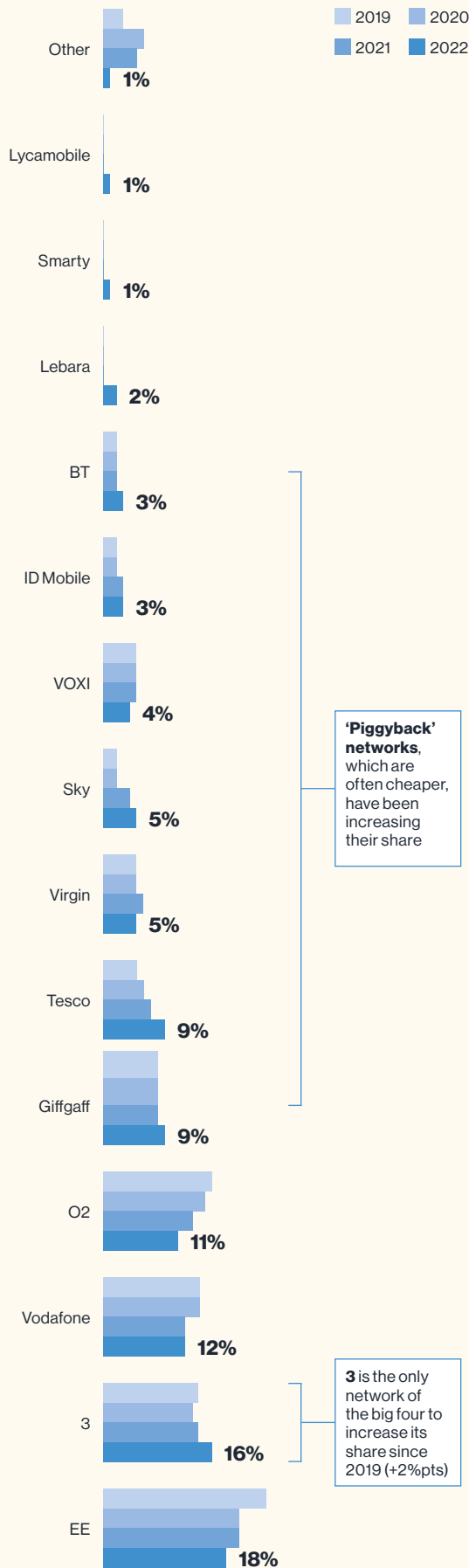


Figure 47. Q: Who paid for your laptop/computer? Respondents: 571

Students are increasingly paying the cost of a laptop/computer for themselves

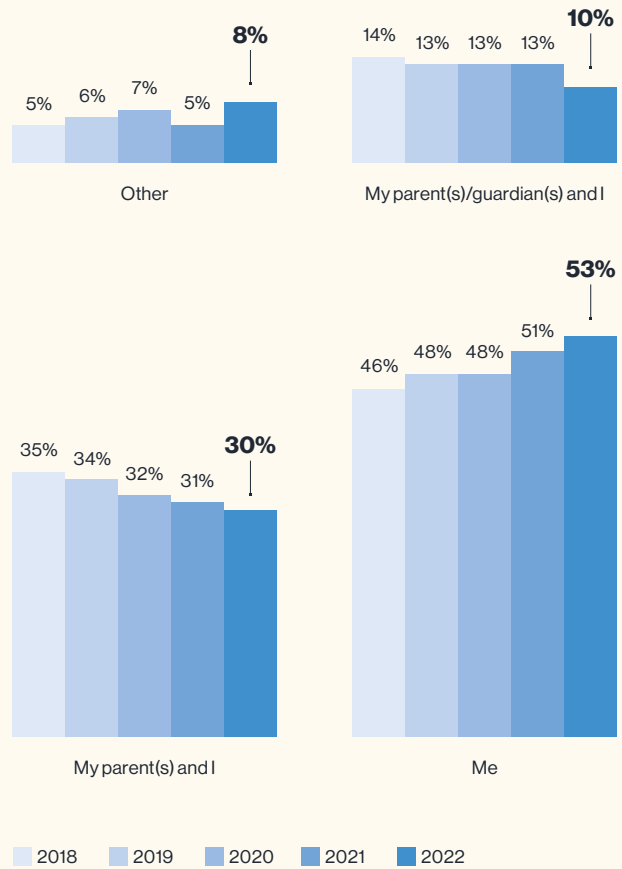
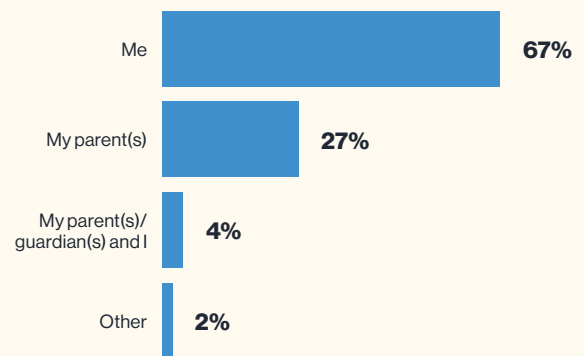


Figure 48. Q: Who paid for your smart wearables? Respondents: 90

And again they are most likely to be purchasing for themselves



£199

▶ Average spend on a smart wearable

Chapter Seven

Retail, Publishing, Travel



Introduction

Media, Marketing, Business

Students are stopping or slowing their spending in plenty of places, but when it comes to groceries, textbooks, and travelling home – the pendulum is still very much swinging. These are the core essentials of university life, they can't simply be given up. So instead of wholesale sacrifice, students are compromising.

For brands, there's a tangible knock-on impact. ALDI and LIDL are challenging the dominance of the grocery establishment. Amazon is watching its market share being chipped away as buying, rather than borrowing, books becomes a luxury. And students are temporarily, perhaps permanently, turning away from cars and trains – for cheaper, perhaps greener, options. The top of all three of these industries may well look very different in a year's time.

How students will manage their financial insecurity is going to stretch way beyond choosing a cheaper brand, too. We're working with colleges and universities to increase awareness of bursaries and funding, but more so to specifically promote apprenticeships which can be far more financially forgiving – earn whilst you learn. Interest in apprenticeships is soaring, and justifiably so.

Across the board, change is coming. Pivoting to meet it doesn't always have to mean lowering your RRP, there are plenty of areas that students are still happy to pay full price for – you only have to look at Apple to see that. It's about creating a buyer experience which is sympathetic to their needs, financial or otherwise, and utilising behaviour data – like you'll find in this chapter – is the only reliable way to get there.



Lavina Chainani
Customer Success Director,
UCAS



Budget-friendly & Bargains Only, Please

For as long as we've been tracking supermarkets, Tesco has always been the student favourite. It has double the amount of stores as its nearest competitor, Sainsbury's¹, and charges similar prices². So when you add Clubcard discounts and ALDI price matching to the mix, the combination of low cost and high convenience is a winning formula that sees the chain hold its crown again this year.

But whilst 63% of students shop at Tesco regularly, there's no denying that even with its price matching, it can't compete on cost with the likes of ALDI or LIDL. Each of the budget supermarkets are used regularly by 42% of students, up from 37% each last year. Their stores might be fewer and further between, but the cost-savings are tempting plenty of students away from their old favourites.

Growing 5% in market share is the biggest year-on-year growth we've ever seen. And given that we've just seen yet another month-on-month rise of the consumer price index, ALDI and LIDL are going to be more important than ever as we move into the final term of the year, and towards the 23/24 intake.

Wherever and however they're shopping, students are looking to their parents and support circles for help too. The buying of groceries in-store, online, and via click and collect have all fallen this year – but the number of first years who rely on 'parents, or others in their household' to arrange groceries has risen by 5%.

Despite all this change, food shopping remains the biggest recurring cost of the student budget, at £44 (or 20%) of their weekly spend.

And whilst choosing cheaper and asking for help might be the new tactics to keep old luxuries alive, there are straight sacrifices being made to spending too. Ordering in is now out, as 11% of students give up takeaways completely – compared to just 3% last year. The number of those indulging regularly (weekly or fortnightly) is also down 6%. With almost half of students telling us they're cutting back on takeaways, only clothing and restaurants are losing more customers.

But again, even with clothing being cut back on by 58% of students, it's still their second highest regular cost – at £37 or 17% of their weekly spending.

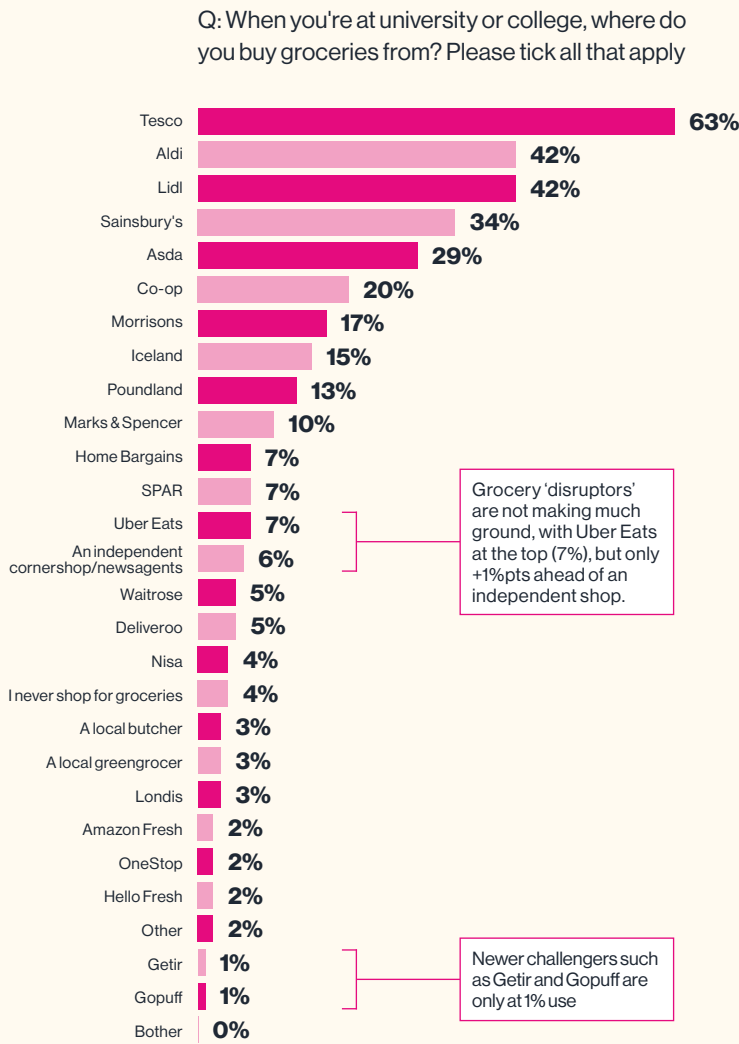
The tactics and enterprise of this year's students is all aimed at giving them the university experience they'd hoped for so long. All of the bargain hunting, side-hustling, cutting back, and shopping around shows their commitment to living the lifestyle they'd been looking forward to. Because they might be spending less, they might be spending differently, and brands might need to do more to fight for their share – but they're still spending.

¹ <https://www.expatica.com/uk/living/household/supermarkets-in-the-uk-465489/#supermarket-chains>

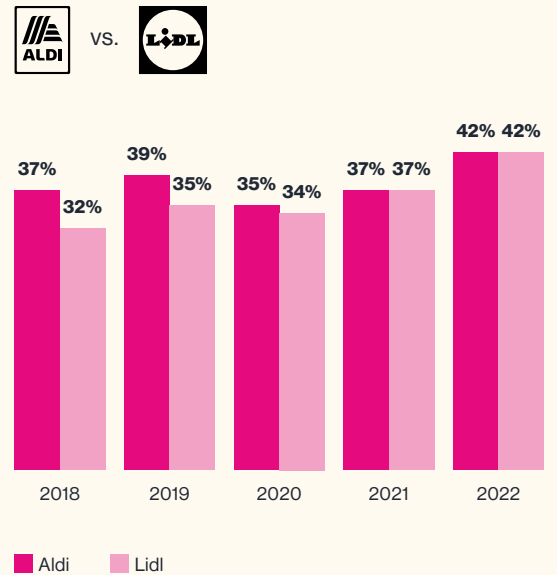
² <https://www.which.co.uk/reviews/supermarkets/article/supermarket-price-comparison-aPpYp9j1MFin>

Figure 49. Respondents: 1,165

Tesco leads the way for grocery shopping, but budget supermarkets are in a clear 2nd place, and use is increasing



Q: When you're at university or college, where do you buy groceries from? Please tick all that apply



► 2022 was the highest year for both Aldi and Lidl, joint on 42%, the largest rise we have seen for any supermarket year on year (+5%pts)

Figure 50. Q: When you're at university or college, where do you buy groceries from? Please tick all that apply. Respondents: 1,165

Online grocery delivery is decreasing in popularity, but it is unclear if this is related to covid changes, or delivery costs

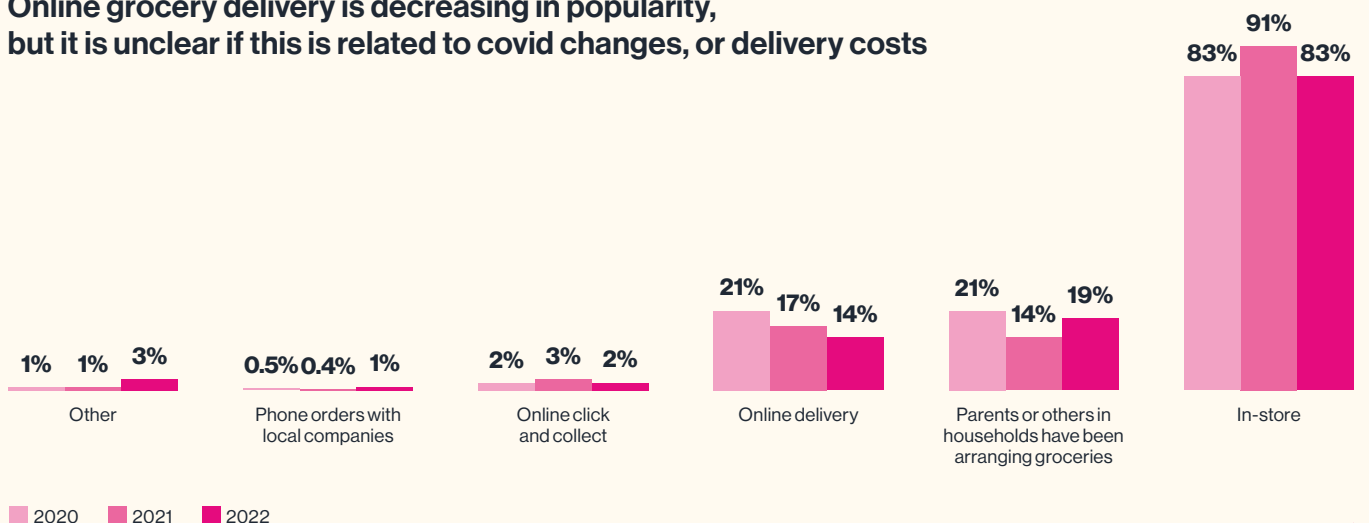
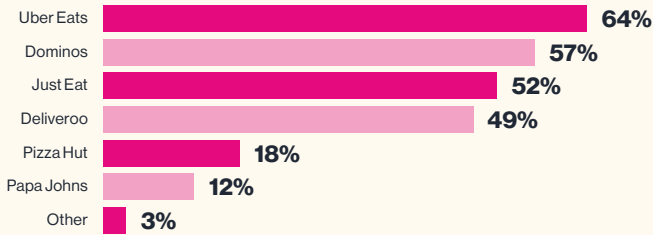


Figure 51. Q: Have you ordered food from any of the following takeaway outlets? Please tick all that apply. Respondents: 951

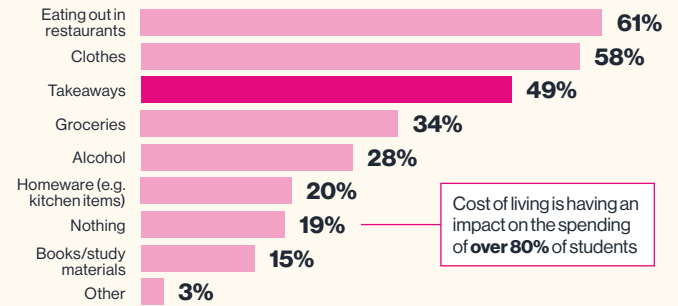
Uber Eats is the most popular food delivery service, but Dominos is the strongest 'single restaurant' performer



► Pizza is hugely important (3 of 7) – sharing occasions

Figure 52. Q: Since moving to university, have you had to cut back on any of the following items because of the cost of living? Please select all that apply. Respondents: 1,142

And almost half of students say they have cut back on takeaways due to the cost of living



Cost of living is having an impact on the spending of **over 80%** of students

Figure 53. Q: How often do you get a takeaway? Respondents: 1,169

This may go some way towards explaining why frequency of takeaways orders is decreasing

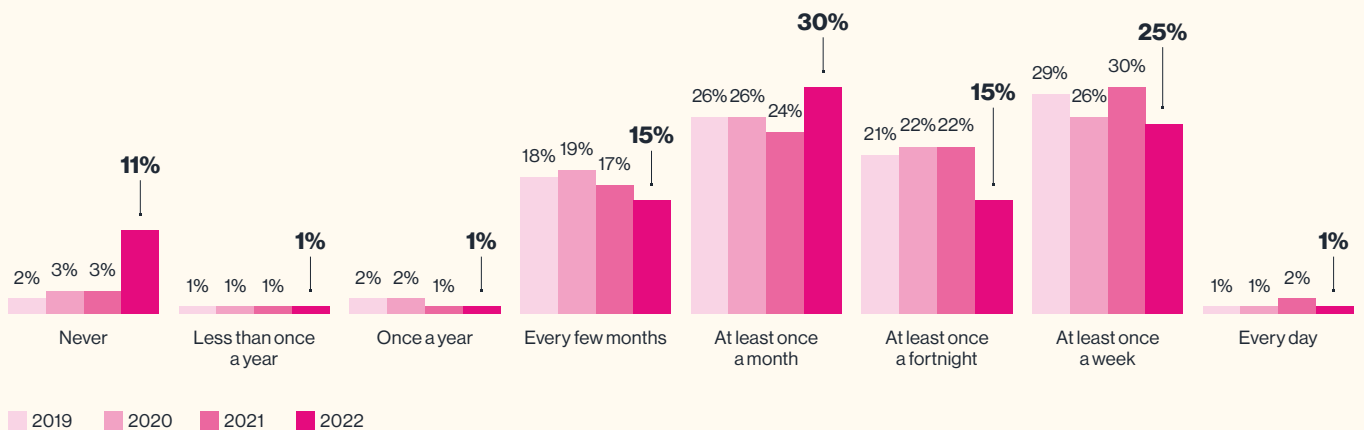
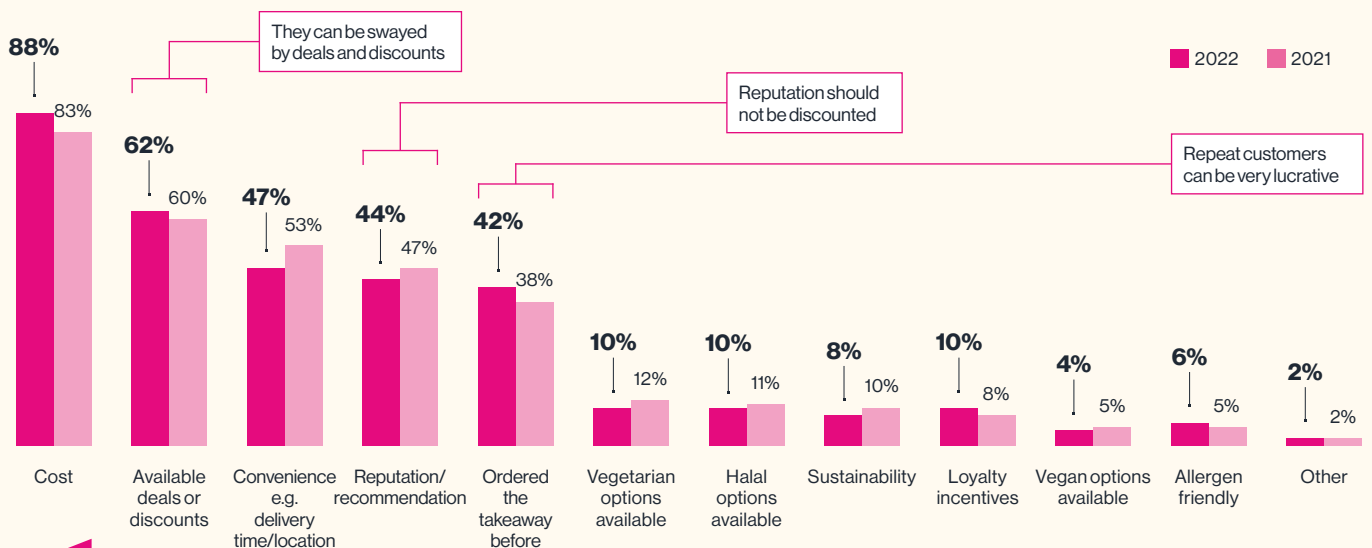


Figure 54. Q: What factors are important when choosing which takeaway to order? Please select all that apply. Respondents: 1,046

Cost is by far the most important factor when choosing a takeaway, and deals/discounts was the only other factor to increase YoY



They can be swayed by deals and discounts

Reputation should not be discounted

Repeat customers can be very lucrative



Another New Pivot for Publishing

For hundreds of years, the nucleus of the university was undeniably the library.

Pre-internet, it was the only place to find the books and papers you needed. As the digital age began, for many it was the only place they could get your hands on a computer. But when Millennials started arriving on campus equipped with their own desktop PCs, and research/reading went online, the library began to take a back seat. It was still a much-loved place of calm, but no longer an essential component of study.

Fast forward to today – with 91% of students bringing their own laptops, and the likes of Kindle, Audible, JSTOR, and KORTTEXT making remote research the norm – the library should, by all means, be quieter still.

But the rising cost of living has sparked a renaissance, as students look to find more affordable ways to access the resources they need: the university library.

In 2022, Amazon is being used less (-10%) for purchasing textbooks, and Blackwells (-3%), eBay(-1%), and independent bookstores (-3%) have all lost some of their market share too. Libraries, though, have been used 5% more.

When we asked students who paid for their books, apart from themselves and their parents, the biggest increase was their university or school. Many of these will be accessed through the library. The same goes for e-book subscriptions, where almost half are provided (paid for) by their institution. And for online access to textbooks, more than 90% rely on their library.

Apps like Libby, or the student-exclusive version Sora, are increasingly being offered in libraries too – allowing people to digitally 'borrow' books and e-books on their mobile devices, for free. It's innovations like these, which offer lower cost and higher convenience, driving more students than ever to tell us that they're not buying textbooks at all this year.

Publishers, book sellers, and academic retailers now need to adapt to an evolving market where students are less likely to make outright purchases – even when they're outright required. Digital, remote access, and lending models are all changing consumer behaviours in the publishing sector.

Figure 55. Q: How did you purchase your textbooks or reading materials for university? Please select all that apply. Respondents: 1,035

The majority made use of the university library, and this has increased +5%pts year on year

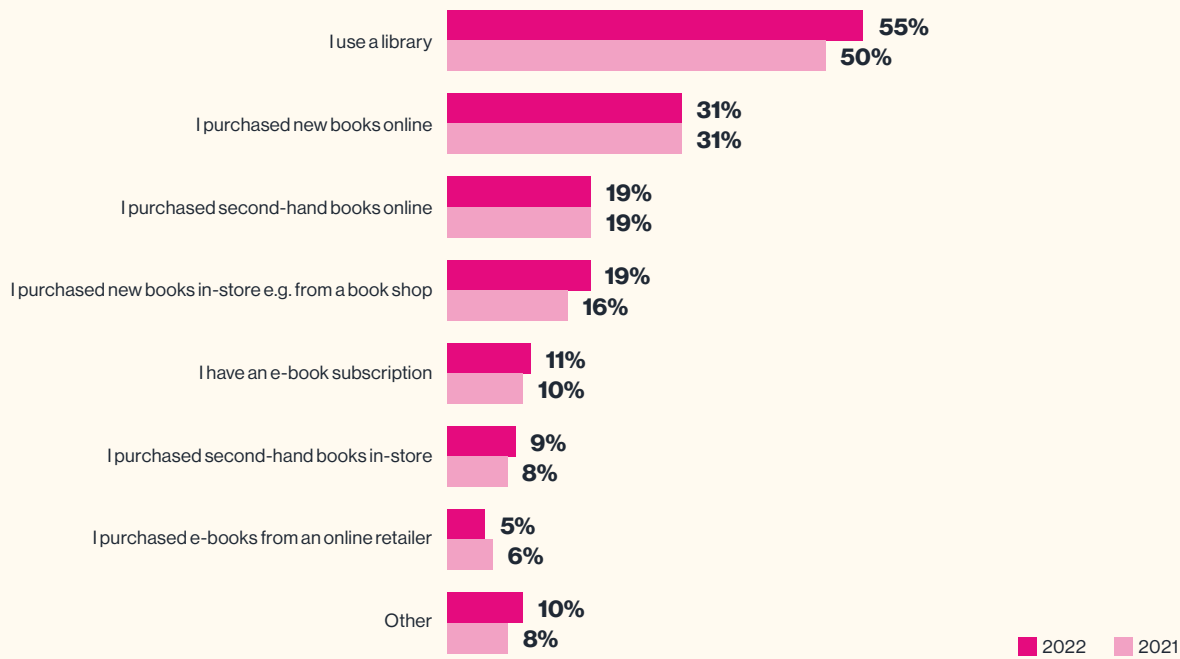


Figure 56. Q: Where did you purchase your textbooks and/or reading materials for university from? Please select all that apply. Respondents: 1,035

Amazon was the most popular source for purchases, but was down substantially against 2020

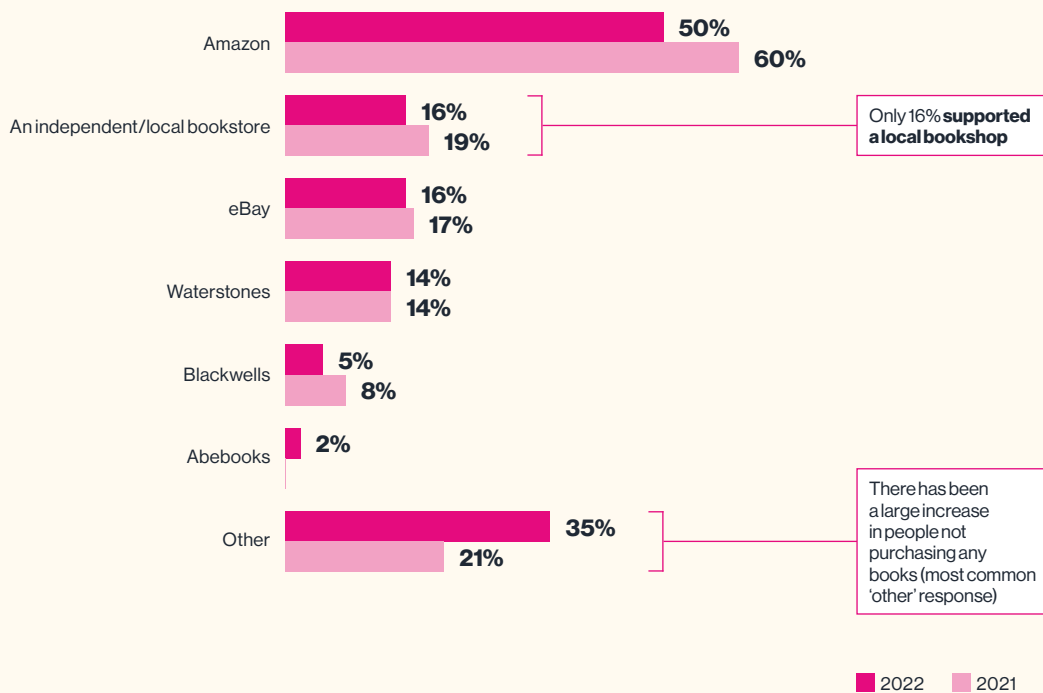




Figure 57.

The majority of students had to pay for their own books, but are increasingly relying on their university or school

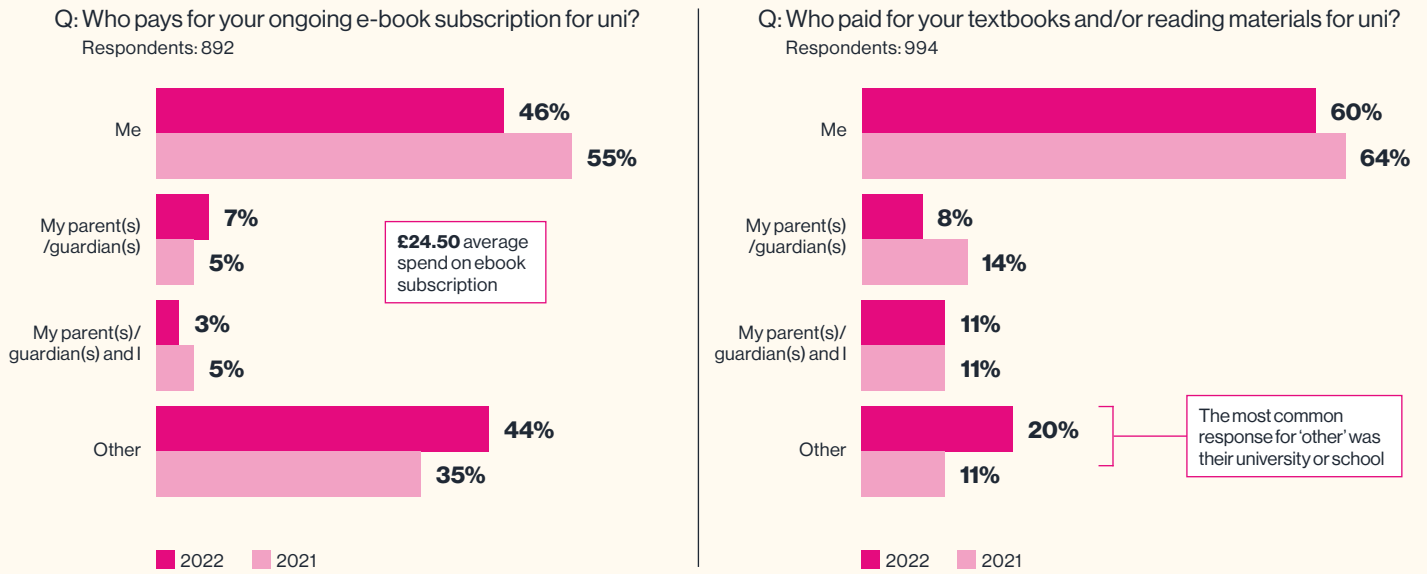


Figure 58. Q: Who pays for your ongoing e-book subscription for university? Respondents: 892

For those using a subscription, almost half are provided for by their institution, but a similar number are paying for their own

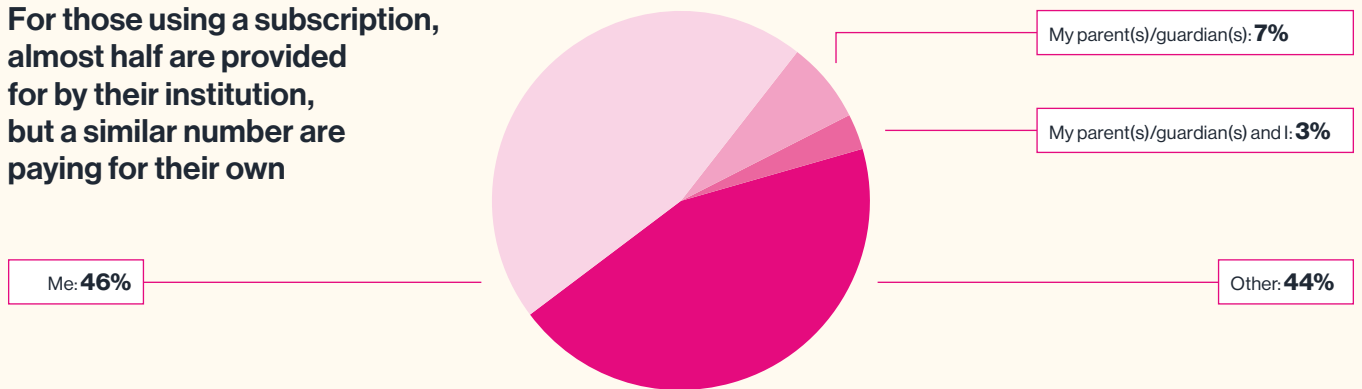
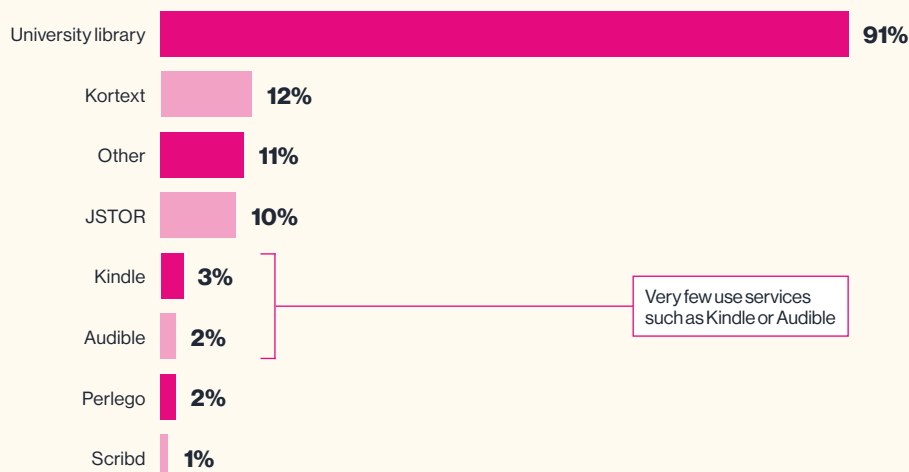


Figure 59. Q: What online service(s) do you use to access your books for university? Please select all that apply. Respondents: 1,138

The online services for libraries lead the way for access to books, but Kortext and JSTOR are also used.



Travel & Transport: Transformed

For students who live away from home, things are finally getting back to the way they used to be.

COVID had a huge impact on how often they could spend time with their friends and families, but 2022 levels are now almost identical to 2019 – the last time they had a completely unimpeached choice on travel. It's good news for everybody, especially the 72% who are planning to visit home during term time this year – up 4% from last. The freedom to choose is likely a fresh feeling for many.

When it comes to how they're getting home, buses are catching up with trains – the traditional favourite. Despite the trusty student railcard, the fact that many train fares are linked to the rate of inflation means that rising prices are making them a decision rather than a definite. Meanwhile, the £2 fare cap on buses is turning them into an increasingly more attractive option. The railway's 26% lead on the road has already shrunk to 22%.

The uncertainty of pricing may also be the reason why season ticket purchases on buses are now 7% higher than on trains, and why most people across most modes of transport are buying tickets on the day of travel. Buying for the season, or even buying in advance, can mean committing early and committing expensive – two luxuries that few students can afford as the cost of living rises. Remaining flexible and financially liquid helps them hold onto that all important freedom of choice.

For shorter journeys, like moving in and around their university towns, it's a much more pedestrian affair. 80% are taking to foot, walking to and from their destinations at least a few times a week (63% do so daily.) Buses are second most used, with almost half using them once a week or more. The big change on last year is cars, where 44% now don't use one compared to only 37% previously. This could be a financial choice or a sustainable choice – we know that both are important to this crop of students – but that doesn't explain why fewer are using bikes this year too. When you factor that in, it looks all the more likely to be about the money.

And by the way, whilst you might have seen plenty of e-scooters in use around your town, it's not students who are using them. Only 7% do.

For travel and transport providers, or for businesses which can't be easily reached by foot or by bus, there's a new challenge to face. The growing shift to a more eco lifestyle, and the adaptation to rising prices in rail fares and car fuel, means the way that students are getting around is changing.



Figure 60. Q: What type of travel tickets do you usually purchase for each of the following types of public transport? (Excludes: not applicable). Respondents: 1,004

Even when excluding those that do not use a specific transport type, most are not committing to a season ticket

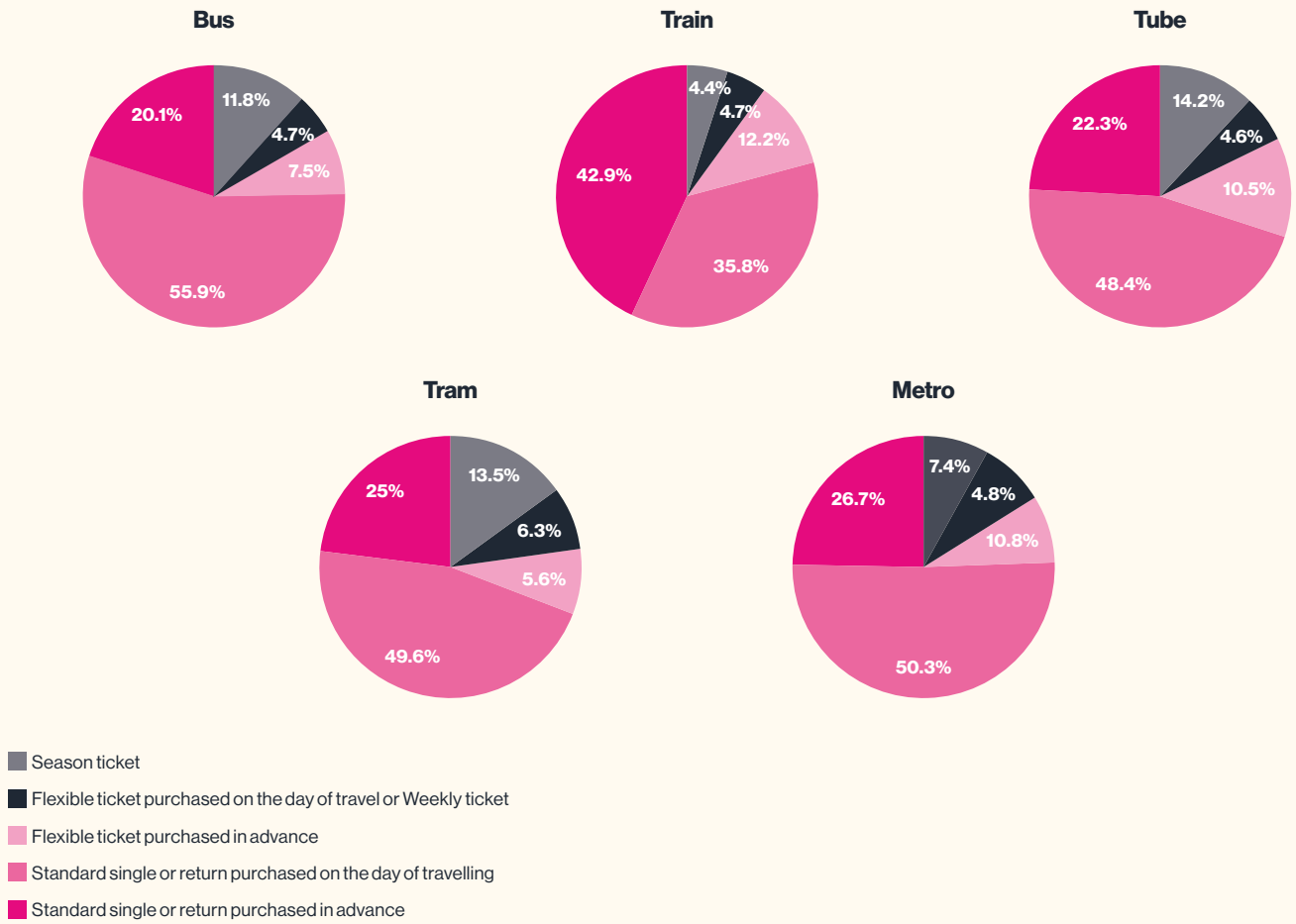


Figure 61. Q: How often do you visit home? Excludes 'other' and those that live at home. Respondents: 1,169

Students are getting closer to normality after 2020 reduced contact frequency with their homes

► **72%** say they will visit home during term time – up +4% vs 2021

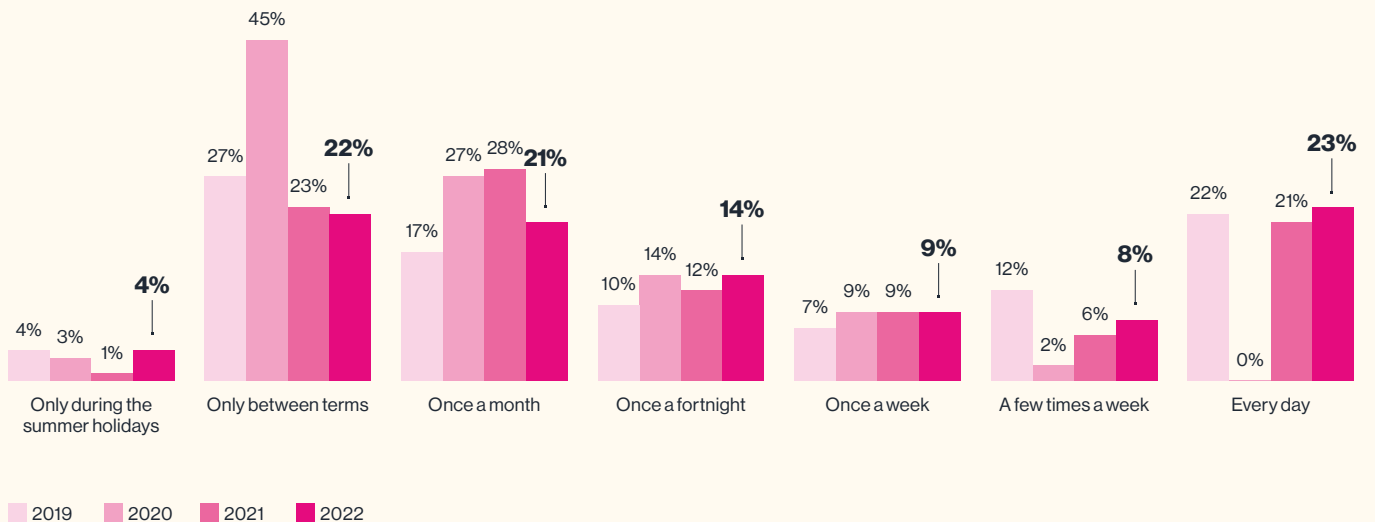


Figure 62. Q: Which mode(s) of transport have you used or do you intend to use for visiting home this year? Excludes 'other' and those that live at home. Respondents: 747

Train is the most used form of transport, but buses and cars are not far behind

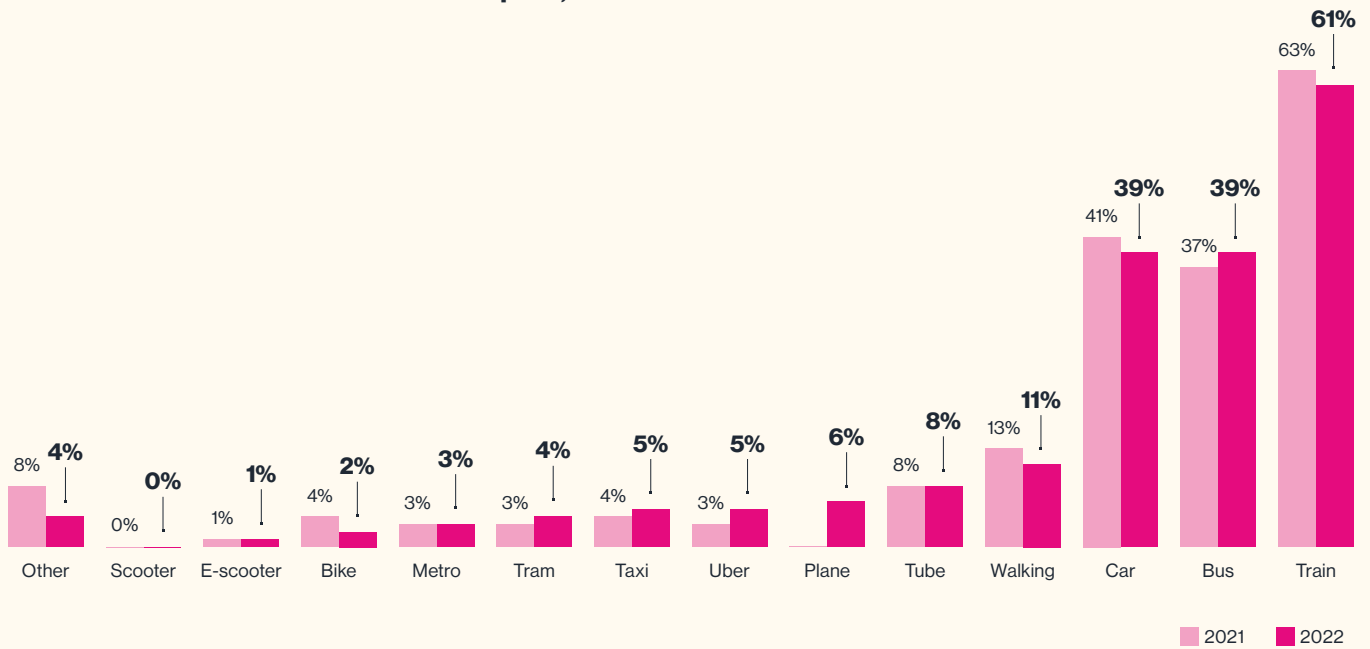
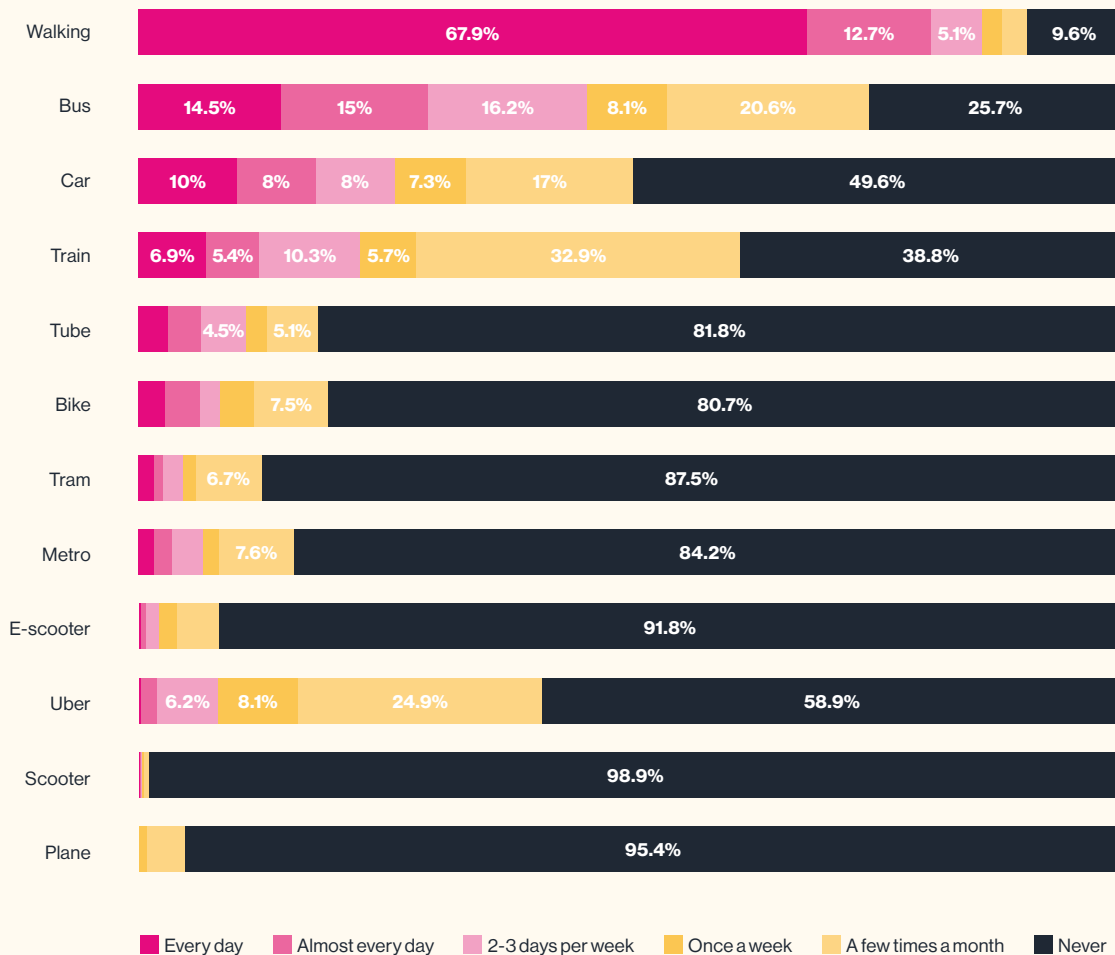


Figure 63. Q: How often do you currently use each of the following modes of transport, in and around your university town or city? Respondents: 1,032

This may be because walking is the most frequent mode of transport, whilst train and bus are slightly higher in monthly use than a car





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