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Impact of the Covid-19 pandemic on university deferral rates and student switching

London Economics, 20th May 2020

Overview

As part of ongoing research work with the University and College Union, London Economics commissioned YouthSight to **administer a survey of higher education applicants** to better understand the impact of the Covid-19 pandemic on prospective enrolment behaviour. This survey will be repeated on an ongoing basis to assess the potential impact on the sector

- The survey was administered between **Thursday 7th May and Tuesday 12th May 2020**
- The sample includes predominantly UK-domiciled students (**87%**) that have applied to undertake undergraduate degree level qualifications at UK higher education institutions
- The analysis is based on the UK-domiciled responses which have been weighted to be representative of the population of HE applicants in terms of **gender, age category** and **type of school attended**.

516 responses

Male	Female
44%	56%
Ind.	State
9%	91%
<19y.o	>=19y.o
73%	27%

UK-domiciled	**87%**
England	*76%*
Wales	*3%*
Scotland	*5%*
Northern Ireland	*3%*
EU-domiciled	**9%**
Non-EU-domiciled	**4%**
North West	*8%*
North East	*3%*
Yorkshire & Humber	*6%*
West Midlands	*8%*
East Midlands	*7%*
Eastern	*3%*
South West	*10%*
South East	*16%*
London	*15%*

Key numbers – relative deferrals

We asked respondents two questions about attitudes towards deferral – one relating to a 'business as usual' scenario – and the second scenario providing a **potential illustration** of the nature of HE provision in September 2020

"Suppose that the university you have applied to or received an offer from will be **operating as usual** in Autumn 2020. In other words, all classes are in person, and there are few if any social distancing restrictions or limits on university activities or student life ……..
To what extent would you still intend to go to university in Autumn 2020?"[1]

86.7%

likelihood of attendance
Mean 8.67 S.D. 2.07

"Suppose that the university you have applied to or received an offer from announces that it will **not be operating as usual** in the first term in Autumn 2020, with many classes delivered online, most university activities severely restricted, and many Covid-19 social distancing restrictions still in place ……..
To what extent would you still intend to go to university in Autumn 2020?"[1]

72.0%

likelihood of attendance
Mean 7.20 S.D. 2.66

Comparing the scenario where higher education institutions are not operating as normal as a result of the pandemic with the business as usual scenario, the analysis suggests that approximately **(17%)** of prospective UK-domiciled students will not enrol in higher education in September 2020.

- Indicatively (because of small sample sizes), the lowest relative deferral rates occurred amongst Scottish-domiciled students, with the highest amongst Welsh-domiciled students

↓14.7pp

[1] Response values: **0** 'would definitely **not** go' to **10** 'would definitely **still** go'. To calculate a likelihood of attendance, we assign 0% probability to responses = '0', 10% probability to responses = '1' etc to calculate a weighted average, and ultimately allow for a percentage point comparison

Key numbers – student 'loyalty'

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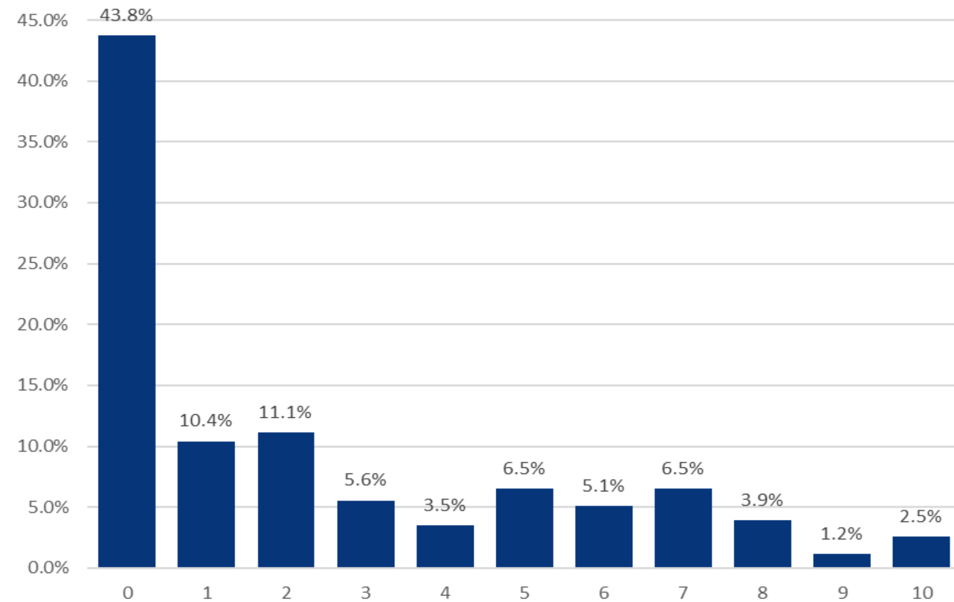
In order to understand the extent to which some universities might be negatively affected by the 'stabilisation cap' and changes in student preferences, we asked respondents about the extent to which they might **consider changing** their higher education institution as part of the Clearing process

"Whatever the nature of provision in Autumn 2020, if you have already received an offer from a university to start your studies in Autumn 2020, to what extent would you **consider changing university** during the Clearing process in August (e.g. because of another university making an offer or a change in your personal preferences)?"

24.4%

Mean 2.4 **S.D.** = 2.92
[0 'would definitely **stick** with my current university' to 10 'would definitely **consider changing** to a different university']

This suggests that the likelihood that prospective UK-domiciled students would **consider switching** provider during Clearing stands at approximately **25%**. This provides an indication of the 'availability' of UK and EU-domiciled students that would be subject to the stabilisation cap and the approximate level of minimum market support existing during Clearing (**75%**)



Percentages refer to number of UK-domiciled responses (excluding don't know / not applicable)

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