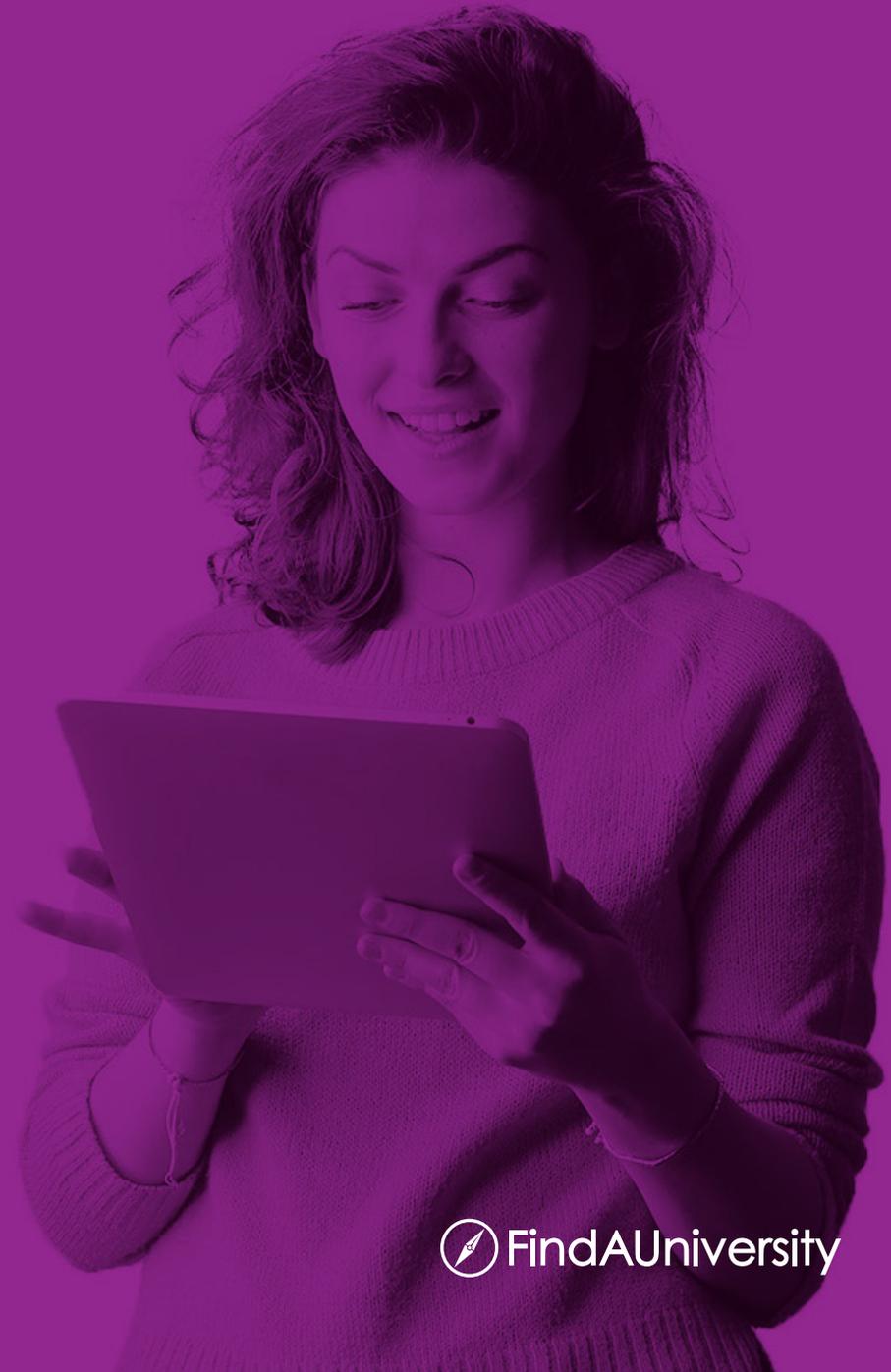


SURVEY REPORT

COVID-19 and postgraduate taught recruitment: motivations, concerns and future opportunities



Introduction and executive summary

Postgraduate taught study is uniquely situated in relation to the ongoing coronavirus pandemic. Masters-level programmes may appeal both to recent graduates wary of an uncertain economy and to workers viewing a return to further training as one way to mitigate the impact of that uncertainty on their current or future career prospects.

This report provides detailed insight into attitudes to postgraduate education in 2020 and beyond. Instead of relying on a single survey point, we've used our FindAMasters audience to assess how prospective students are responding to the pandemic over time and what that might mean for postgraduate study in the future.

The results are encouraging, revealing that **48%** of people **remain committed** to postgraduate study as of **June 2020**, with only **7% planning to defer**. Meanwhile, **62%** of recent graduates who were planning to seek work now say the pandemic has made them more likely to consider a Masters.

Future postgraduates are also broadly willing to adapt their study preferences to universities' circumstances. Over **70%** would consider **starting their Masters**

in January; the same proportion would be happy with a **blended transition** from online study in September to on-campus study in the new year.

Despite these positives, uncertainty amongst prospective students appears to be growing over time, with **63%** now concerned about future disruption of their studies and **68%** being **worried about future employability**.

This report identifies some of the work postgraduate recruitment teams can respond to the opportunities afforded by the coronavirus whilst negotiating the obstacles it poses. We'd be happy to discuss how we can help you do that: info@FindAUniversity.com

*Dr Mark Bennett,
Head of Content, FindAUniversity*

FindAMasters



2004
launched



900,000
average monthly visitors (2020)



118,000
average monthly email and website referrals

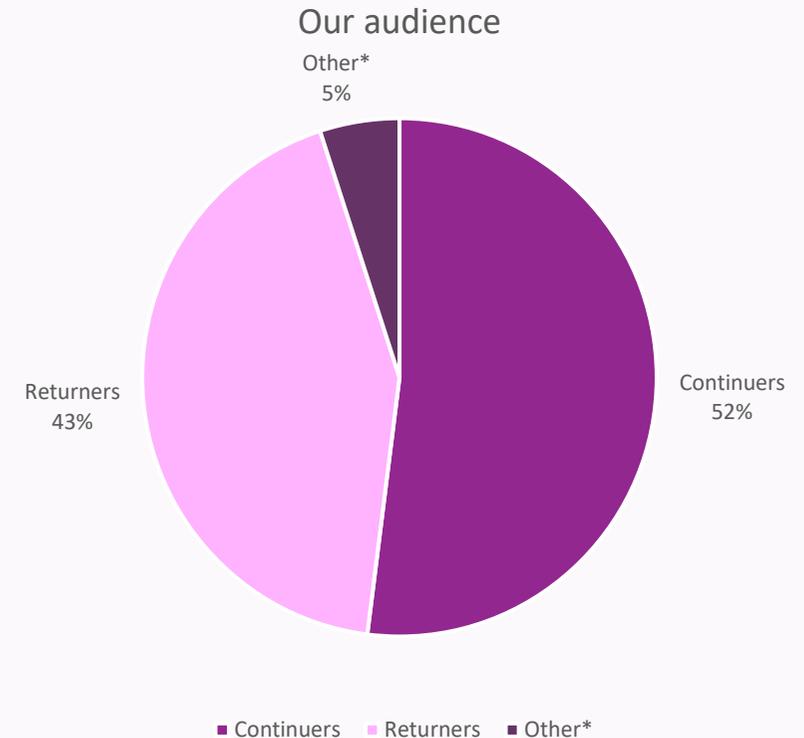
Audience

FindAUniversity surveyed **613** prospective postgraduates between **15 May and 30 June 2020**.

In order to make these responses as useful as possible, we've divided them into two core audiences for postgraduate marketing and recruitment:

- **52%** of our participants are **continuers**
(current or recent undergraduate students aged 18-24).
- **43%** of our participants are **returners**
(people aged 25 or over who aren't currently at university).

The result is a **highly targeted** and **usefully segmented** data set that accurately measures the **views, concerns** and **motivations** of prospective PGT students during the coronavirus outbreak.



**Other includes a small number of responses from mature undergraduate students*

Participant nationality and study intentions

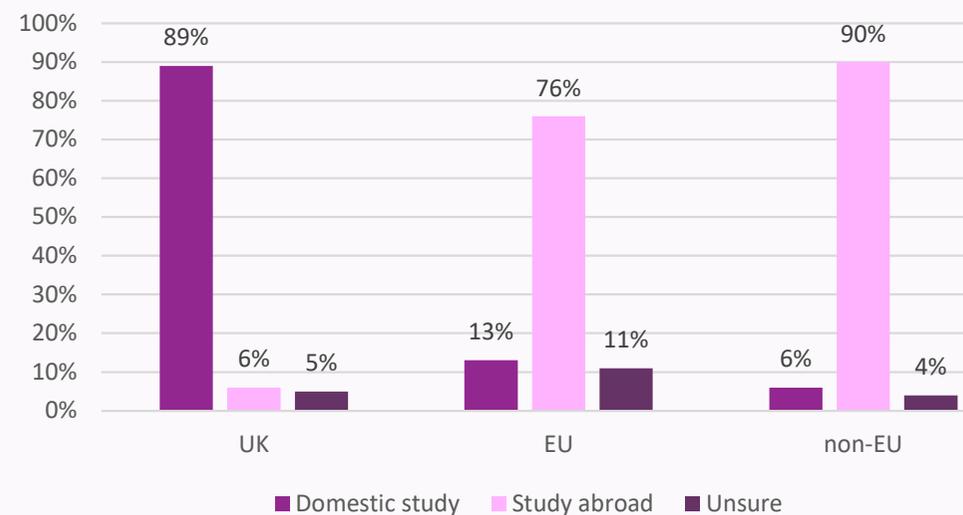
Of the 613 participants we surveyed, 183 were UK nationals, 54 were EU nationals and 376 were non-EU nationals.

The study intentions for these groups are largely as expected:

- **British** students are primarily seeking postgraduate opportunities in the UK, although over 10% would consider studying abroad.
- Conversely, the vast majority of **non-EU** students are seeking international opportunities.
- Students from within the **EU*** are also motivated to study abroad, though this group is also the most undecided.

**EU responses also include participants from the EEA and Switzerland, who receive similar reciprocal rights and benefits when studying abroad.*

Study intentions



Overall impact of the coronavirus on PG study intentions

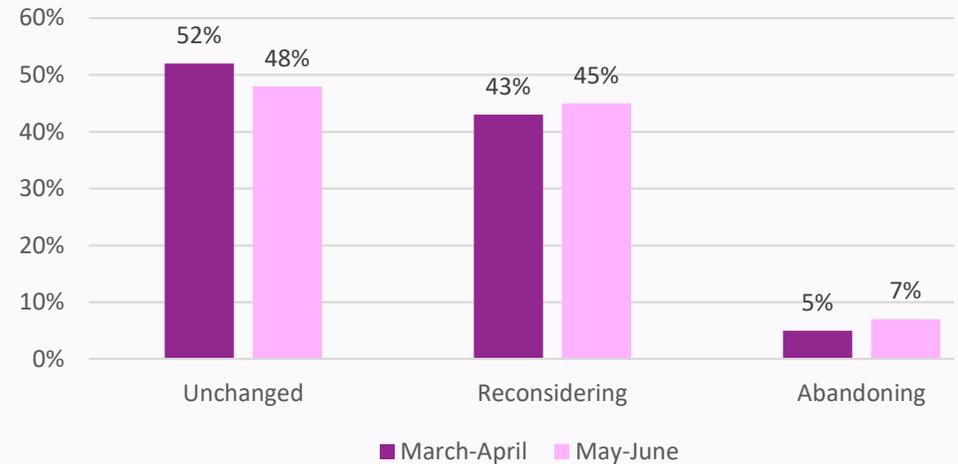
We sought to create a simple measurement of the impact of coronavirus by asking participants if their postgraduate study intentions for 2020-21 remained **unchanged** or whether they were **reconsidering** or **abandoning** those plans.

By comparing these **May-June** results to those from our earlier **March-April** survey, we can measure how postgraduate study intentions may have changed during the pandemic:

- A large proportion of prospective students **remain committed** to postgraduate study and very few are considering abandoning their plans.
- However, overall postgraduate study intentions have become slightly uncertain as the pandemic has progressed, with a slight swing towards **reconsidering** and abandoning.

Takeaway: Taught postgraduate study remains appealing to the vast majority of students, but prospective applicants may need more proactive reassurance and engagement from universities as time goes on.

Impact of COVID-19 on overall postgraduate study intentions



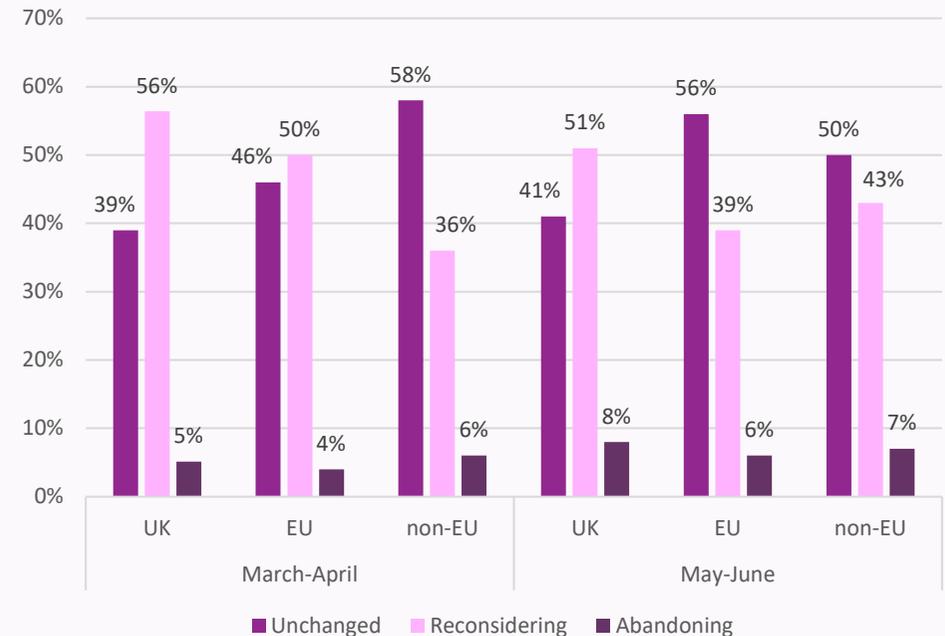
Impact on study intentions by nationality

We can see that nationality and study intentions play a clear role in shaping prospective students' responses to the coronavirus, over time:

- **UK students** have become slightly more decided, with an almost equal swing from **reconsidering** to **committing** or **abandoning**. This suggests that Masters-level study remains appealing for this audience, but a significant number are still seeking reassurance.
- **EU students** have become significantly more **committed** to postgraduate study in 2020-21. This may stem from a perception that EU countries have successfully dealt with the initial coronavirus impact. Some students may also seek to benefit from the last year of UK fee and funding guarantees.
- **Non-EU students** have become more concerned about postgraduate study over time, with a shift towards **reconsidering** or **abandoning**. This probably reflects uncertainty over visa conditions and international travel.

Takeaway: Very few prospective postgraduates plan to defer study, but many are seeking reassurance. Universities could provide this by clarifying the steps they are taking and communicating details of recent visa changes and student finance assurances. Doing so is likely to boost postgraduate recruitment now and in January 2021.

Impact by nationality



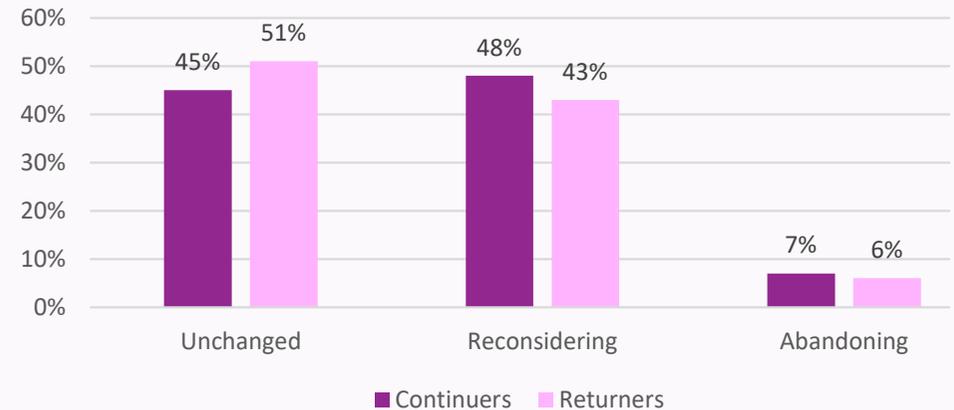
Impact on study intentions by demographic

We also measured the impact of the coronavirus on different prospective student demographics and asked whether those who *had* been seeking graduate employment are now more likely to consider postgraduate study:

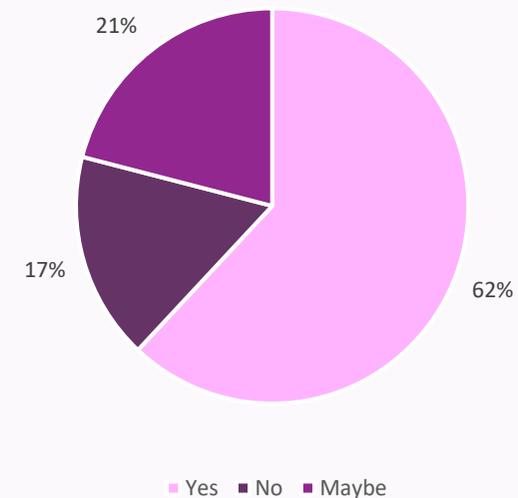
- Current or recent undergraduate **continuers** are slightly less confident about postgraduate study (perhaps influenced by experiences of recent disruption), whilst older **returners** are more committed.
- There has also been a significant **swing to postgraduate study** amongst those who would otherwise have sought graduate employment.

Takeaway: Postgraduate study is being considered as an attractive alternative to employment during the economic uncertainty caused by the pandemic. Universities should emphasise the practical benefits of their Masters programmes through alumni case studies, employability data or similar.

Impact by demographic



Are people more likely to consider postgraduate study as a result of the coronavirus outbreak?



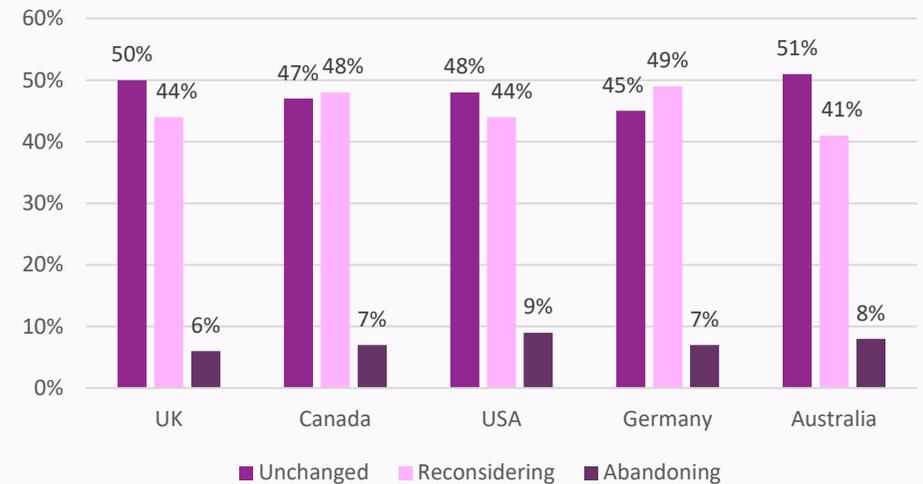
Impact on postgraduate study abroad

Interest in postgraduate study during the coronavirus also **varies geographically**. We asked what impact the coronavirus was having on prospective students' plans to study in different countries:

- Prospective students are slightly more committed to postgraduate study in the **UK, USA** and **Australia**.
- Interestingly, preferences for postgraduate study **don't obviously correlate with the impact of the coronavirus in different countries** (or common perceptions thereof).
- Overall, **very few** prospective international postgraduates are **abandoning** their plans to study abroad this year.

Takeaway: Universities should not assume that the impact of the coronavirus on their country will play a definitive role in persuading or dissuading international postgraduates. Prospective students may be more influenced by the presence and clear communication of assistance and safeguards, including relevant policy changes.

Impact on study abroad

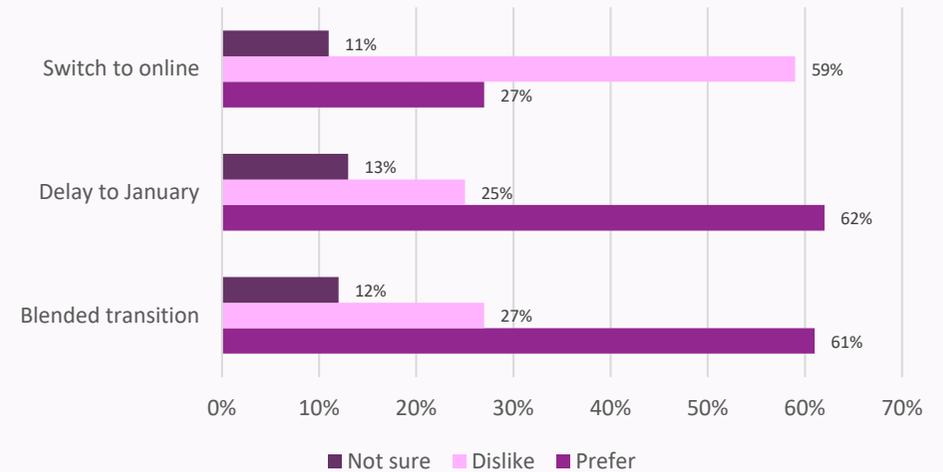


Postgraduate study preferences

The coronavirus impact introduces a new dimension to prospective students' decision making. This is especially **important for postgraduate courses** as many applicants will already have experienced disruption. We asked students how they felt about different options for course delivery in the coming year:

- Only **27%** of students are in favour of a complete **switch to online** learning for the duration of their course. This is also the most unpopular option.
- Conversely, **over 60%** of students support either a **delay to January** (for on-campus delivery) or a **blended transition** (from online in September to on-campus provision in January).

Study preferences

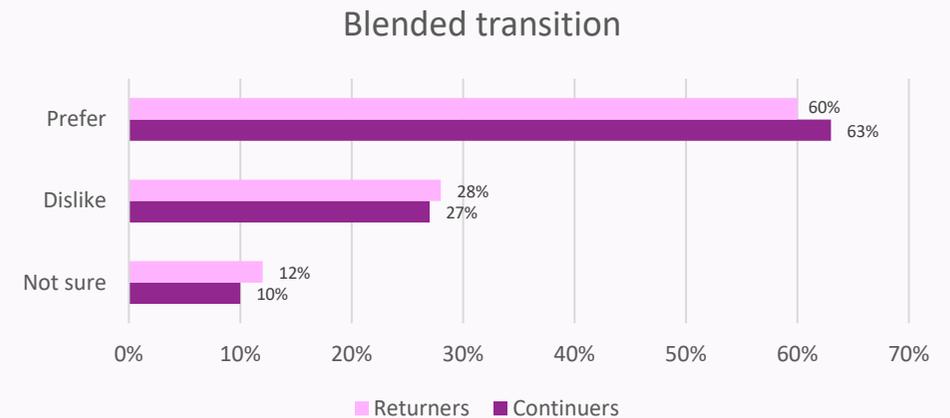
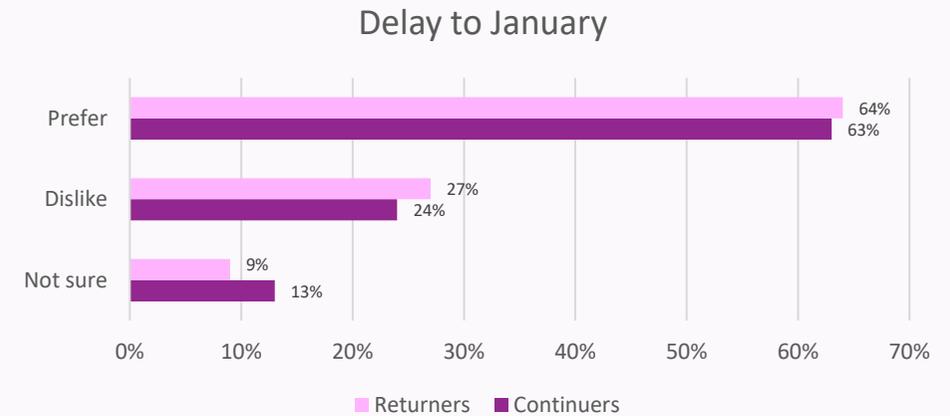
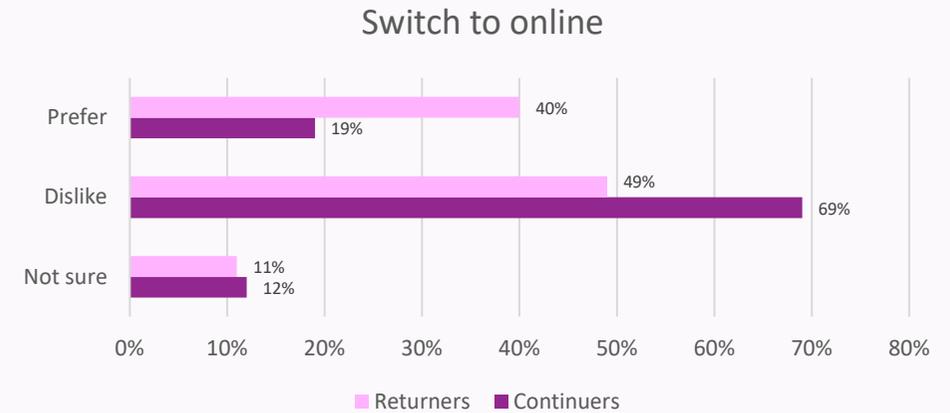


Preferences for continuers and returners

Preferences vary slightly when we group prospective postgraduates into potential **continuers** vs **returners**:

- **Continuers** are much less supportive of making a complete **switch to online** study, whereas around half of **returners** would at least consider studying in this way.
- **Returners** are slightly less favourable towards a **blended transition**, perhaps preferring to adopt one mode of study and fit this around other commitments.

Takeaway: Traditional on-campus learning remains the objective for postgraduate study, but most people are willing to compromise to some extent in order to realise this. In particular, many students may be willing (or planning) to put off Masters study until January. Universities should bear in mind that prospective students' circumstances (and recent study experiences) will influence their preferences.

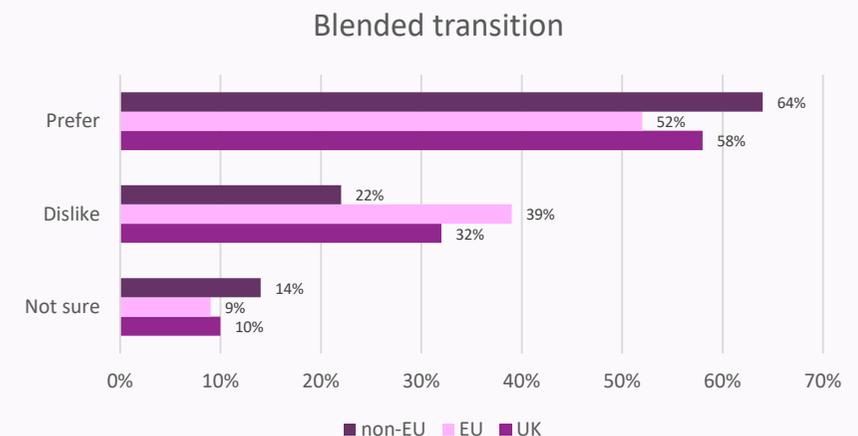
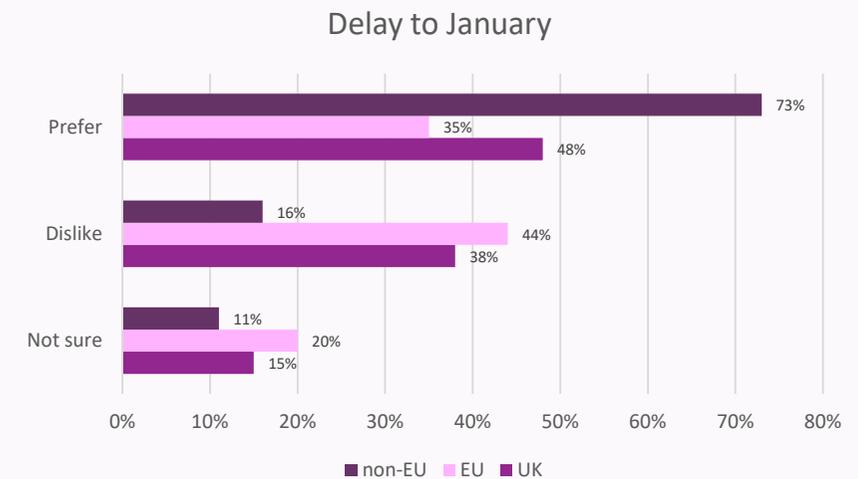
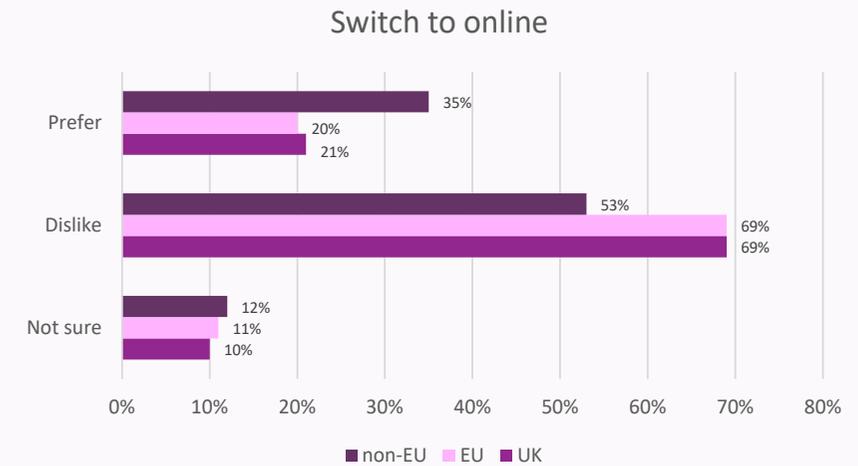


International study preferences

Where students plan to study a Masters-level course may also determine how they are willing to study it. This becomes apparent when we compare preferences for **UK students** (generally considering domestic universities) with **EU** and **non-EU** students (generally seeking to study abroad):

- **UK students** are the least supportive of a complete **switch to online**, but would prefer to begin studying in September with a **blended transition** to on-campus learning.
- **EU students** also prefer some form of on-campus provision, but are least in favour of a **delay to January**. This may reflect uncertainty regarding Brexit (as many of this group will be considering UK universities).
- **Non-EU students** are happiest with a **delay to January** (though most would also consider a **blended transition**, which recent visa changes have made possible in the UK).

Takeaway: Universities should consider variations in preference when presenting and marketing courses and study options to different groups of prospective postgraduates. UK programmes that rely on overseas recruitment may benefit substantially from communicating recent visa changes and emphasising the availability of January start points.



Attitudes to online study

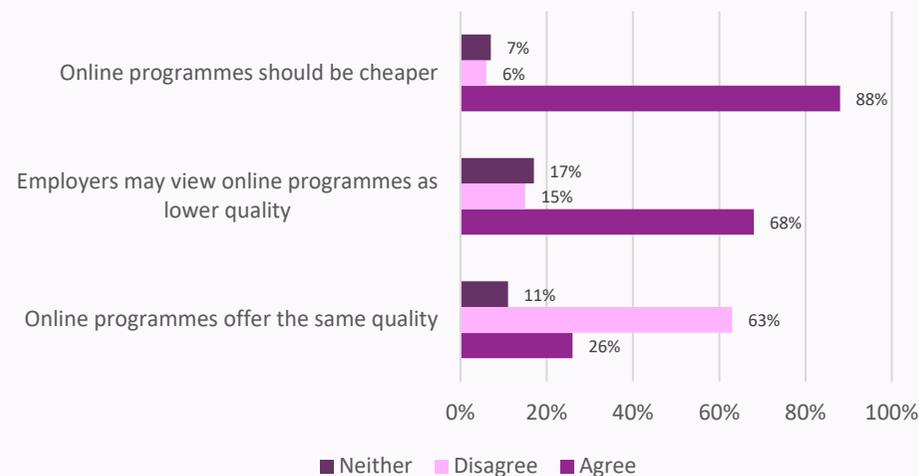
Postgraduate programmes are likely to be at least partially delivered through online or blended learning in 2020-21. Attitudes to these options will therefore play a key role in students' decision-making journeys:

- The majority of prospective students feel **online programmes should be cheaper** than their on-campus equivalents.
- More students are concerned about **employers' perspectives** of online qualifications than disagree that online programmes offer **equivalent quality**.
- Segmenting these responses reveals that **34%** of **returners** are satisfied online programmes represent **equivalent quality** (vs only **16%** of **continuers**). **Returners** are also slightly less concerned about **employer perspectives** (**62%** are concerned about this, vs **74%** of **continuers**).

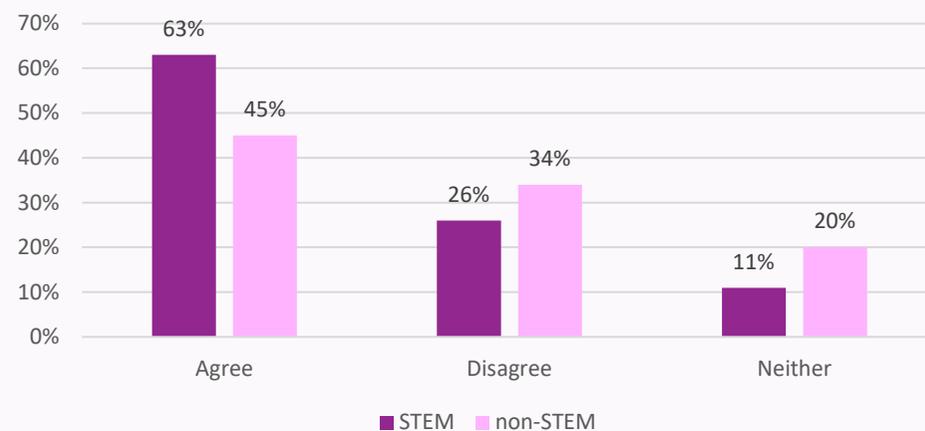
We also asked whether prospective postgraduates thought online learning was practical in their intended subject area. As might be expected, prospective **STEM** postgraduates are more concerned about the feasibility of online study, but this perspective is not unanimous.

Takeaway: Prospective students' initial scepticism of online delivery is likely to be grounded in concerns over practicality and employability, to which universities can respond with relevant messaging and examples. A belief that online programmes should be cheaper can be countered by emphasising the parity between on-campus and online experiences at PGT level. Older students seeking to return to university and retrain may also feel more positive about online learning in general.

Perceptions of online study



"Online programmes aren't practical in my subject area"



Student concerns

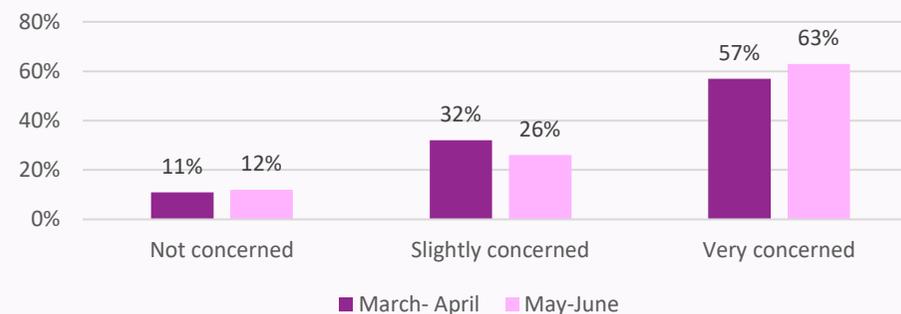
Many prospective postgraduates are concerned about the effect of the coronavirus on other aspects of their courses. The comparatively short length of a Masters exposes relatively more of a degree to short term disruption, whilst student finance usually only covers a proportion of its overall cost. Prospective **international students** may also have specific worries, such as their ability to obtain a student visa.

By comparing results from our **March-April** and **May-June** surveys, we can measure these concerns over time:

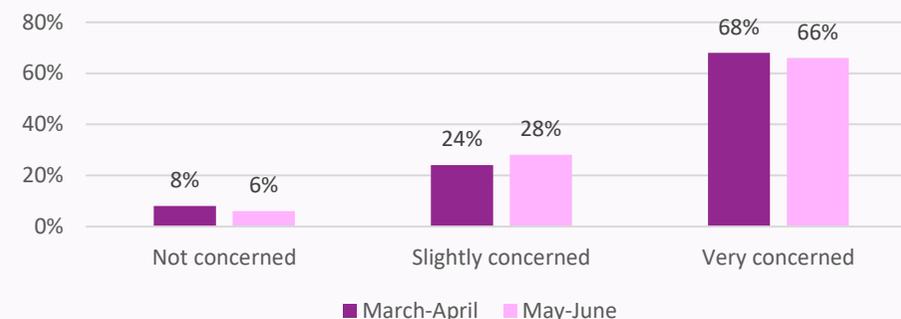
- Concerns about **affordability** have become more embedded, possibly reflecting students' personal experience of economic disruption and scepticism over the future availability of part-time work.
- Conversely, prospective students have become slightly less concerned about **study disruption**, possibly reflecting lockdown easing and / or effective changes to current undergraduate provision.
- Prospective **international students** have remained very concerned about visa availability. This is despite new concessions and assurances in popular destinations such as the UK.

Takeaway: Some of prospective students' concerns about postgraduate study may be indirectly shaped by ongoing developments. In addition, the existence of assistance and assurances (such as for UK student visas) may not reassure students unless effectively communicated to them. Both factors could be important for courses seeking to recruit in January.

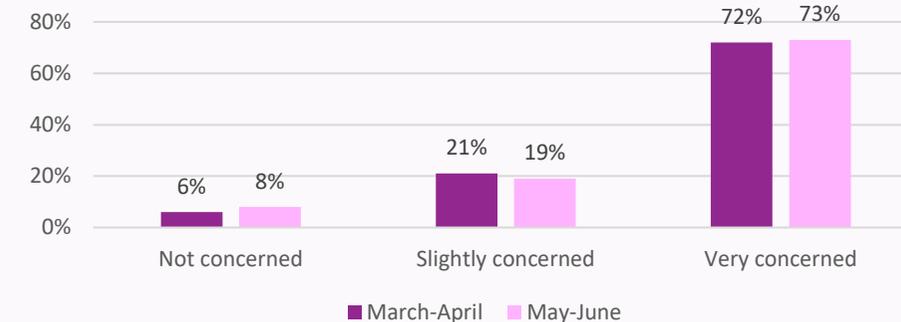
Affordability



Study disruption



Visa availability (international students)



Conclusion

This report demonstrates the potential for both resilience and growth in postgraduate taught recruitment, despite the many challenges posed by the coronavirus pandemic.

Throughout 2020, postgraduate study has remained appealing to both current and recent undergraduate students as well as those considering returning to university for Masters-level (re)training. This is true for prospective international students as well as those focussed on domestic study.

Very few people expect to abandon or defer their study plans and there is evidence to suggest that postgraduate study is becoming more attractive to those who would otherwise have sought graduate-level employment. Most prospective postgraduates are also willing to consider flexible study options, whether that means accepting a blended learning option or waiting until January to begin a Masters.

However, there is work for universities to do in responding to student concerns and information needs over the short, medium and long term. We recommend that postgraduate marketing and recruitment teams:

- Emphasise the **availability of January start dates**, where available. Many prospective students (especially internationals) are already interested in this option and a further swing towards postgraduate study may occur between now and the new year.

- Do not simply rely on the announcement of top-level interventions from governments and funding bodies: make an active effort to **communicate and explain positive developments** such as student finance, visa concessions and Brexit guarantees.
- Recognise the **increasing importance of employability** as a context for any increased interest in postgraduate amongst both returning and continuing students. Provide clear information on training and other practical benefits as well as appropriate alumni case studies or employer testimonials.

Finally, it will be important to keep in mind the changing impact of the coronavirus pandemic and the potential for a range of factors to both directly and indirectly shape attitudes to Masters-level study in the near future.

We will continue to listen to and engage with our FindAMasters audience in order to provide the most accurate and up-to-date understanding of attitudes to postgraduate study as they continue to evolve.

Get in touch with our team to learn more about what we're doing and see how we can help your postgraduate recruitment and marketing activities:
info@FindAUniversity.com.