

Evaluating the impact of number controls, choice and competition : an analysis of the student profile and the student learning environment in the new higher education landscape.

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Evaluating the impact of number controls, choice and competition: an analysis of the student profile and the student learning environment in the new higher education landscape



Carol Taylor and Colin McCaig





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Forward

The policy environment for universities in England has changed significantly over the past few years. This can be seen most obviously in relation to the funding of undergraduate education, but other changes will come to be seen as equally influential in the long term. One example is the change to the policy on controlling student numbers, which is the subject of this new report from the Higher Education Academy and Sheffield Hallam University.

The report, and the findings it details, is timely. Universities have entered a world of deregulation and increased competition. They have had to respond rapidly to these changes, in order to operate effectively in the more market-based system which now underpins the core business of educating undergraduate students. At the same time, student expectations have rightly increased, and there is growing awareness of the importance of the transition from university to the labour market. This in turn is recognition of the vital role that universities play in driving economic growth.

Universities have employed a range of means to adapt to the new environment, maximising the educational and economic contribution they make. Many institutions have adroitly used the changes to position themselves effectively, sharpening their strategic focus, and increasing their capacity in areas such as marketing, recruitment, analytics, and employability. Others have taken the opportunity to review their institutional profile and activities, asking significant questions about where they want to be in the future. These are all signs of a healthy, agile, and well-managed sector, responding flexibly to significant external developments.

The pace of change shows no sign of letting up. Since the report was first commissioned the Chancellor announced in the Autumn Statement that the cap on student numbers will be lifted completely from 2015/16 onwards. The sector has also seen increased interest from the Office of Fair Trading through its call for information on undergraduate education in England, and this attention is likely to persist for some time to come. These developments, while independent, are signs both of a growing acknowledgement of the sector's importance, but also of the more competitive nature of the operating environment. Universities will need to adapt and respond once more.

The evidence from this report is that, for the most part, they will be able to do so effectively. More than that, they will be able to do so in a way that continues to enhance and improve the student experience, and deliver economic benefits. Nevertheless, there are clearly issues to watch out for in future: the impact of student number control policies on social mobility, and the impact on part-time student provision being just two such areas of concern.

The findings from this study will be of value to politicians, policy-makers, and institutional leaders alike. The issues will, in one form or another, be with us for some time, and I have no doubt that this report on such a pertinent and important subject will prove an invaluable resource and reference point for the future.

Paul Clark
Director of Policy, Universities UK

I. Executive summary

The research project *Evaluating the impact of number controls, choice and competition: an analysis of the student profile and the student learning environment in the new higher education landscape* sought to develop an understanding of the impact of the stimulation of choice and competition on the sector. The research took place in the context of a volatile policy environment and the report highlights the complex effects of two concurrent and linked processes: one, the ongoing effects of marketisation and how institutional decision-making processes are inflected by the daily realities of a system based on choice and competition; and two, the traceable effects of the specific Student Number Control (SNC) 'core and margin' policy since 2012-13.

I.1. Background

In 2011 the Department for Business Innovation and Skills (BIS) announced a major new approach to controlling Higher Education Funding Council for England (HEFCE) -financed student places in English higher education providers. Number controls have been used in a variety of ways in England since 1993 to control the amount of funding that the Government invests on students studying for undergraduate degrees. The most recent student number control cap on places was introduced in 2009. The changes that this report focuses on, and which came into effect alongside the introduction of higher fees in September 2012, were introduced by BIS as an attempt to further increase choice for students and competition amongst higher education providers. As signalled in *Students at the Heart of the System*, the intention was to introduce mechanisms that would stimulate (or accelerate) a market effect:

“The changes we are making to higher education funding will ... drive a more responsive system. To be successful, institutions will have to appeal to prospective students and be respected by employers. Putting financial power into the hands of learners makes student choice meaningful.

“We will move away from the tight number controls that constrain individual higher education institutions, so that there is a more dynamic sector in which popular institutions can grow and where all universities must offer a good student experience to remain competitive.” (BIS 2011:5)

SNC had previously operated by allocating Maximum Allocated Student Numbers (MASNs) for each institution, with 5% plus/minus tolerance bands for funded places introduced from 2002/3, and a system of grant reductions in future years in cases of over-recruitment (Economics of HE 2013).

Declaring an intention to 'free up 85,000 places for competition' *Students at the Heart of the System* set out to:

“...introduce a flexible “core and margin” model to be administered by HEFCE. From year to year, every institution will have to compete for the student numbers outside its core allocation and the core will reduce every year”.

“In 2012/13 there will be two elements in this new approach. We propose to allow unrestrained recruitment of high achieving students, scoring the equivalent of AAB or above at A-Level. Core allocations for all institutions will be adjusted to remove these students. Institutions will then be free to recruit as many of these students as wish to come. Under the new funding arrangements, institutions may be eligible for HEFCE teaching grant for these students, for example those on high-cost courses, and the students will be able to access loans and grants. This should allow greater competition for places on the more selective courses and create the opportunity for more students to go to their first choice institution if that university wishes to take them. We estimate this will cover around 65,000 students in 2012/13. AAB will represent a starting point, but our ambition is to widen the threshold over this parliament, ensuring that the share of places liberated from number controls altogether rises year on year.

“The second element is the creation of a flexible margin of about 20,000 places in 2012/13 to support expansion by providers who combine good quality with value for money and whose average charge (after waivers have been taken into account) is at or below £7,500.” (BIS 2011: paras 4.18; 4.19; 4.20)

From 2013-14 (the second year of core and margin), the exempt grades were ABB and above, while the quality and value margin was augmented by an allocation of 5,000 new places. A consequence of these changes was to shrink the controlled ‘core’ (SNC) allocations within an overall national numbers cap, and also to potentially change the balance of core and exempt students within each institution.¹

In the view of those who participated in this research, the changes had not, in the first two years of operation, led to a market differentiation in fees or to a general redistribution of higher achieving students (those with ABB or above) between institutions. It is probable, therefore, that this realisation influenced the Treasury's Autumn Statement decision to fund an additional 30,000 places in 2014-15 and abolish SNC altogether from 2015-16 (HM Treasury 2013), something not anticipated by any of our research participants only months beforehand.

This most recent SNC policy may, therefore, be seen historically as a policy intervention which focused on just a few variables – the number of AAB/ABB students attending institutions and the tuition fee charged by institutions – to stimulate marketisation and consumer choice in the system as measured by pre-existing instruments such as the National Student Survey (NSS) and the Destination of Leavers in Higher Education (DLHE). A key question for future further analysis is whether the policy was changed because it had failed to produce the required market differentiation quickly enough (e.g. to reduce fees and thus public expenditure on higher education) or whether it had failed because the emphasis was on the wrong variables and thus led to unintended and undesirable consequences. This report goes some way to answering this by exploring the complexity of admissions decision-making processes, the interaction of competing and often conflicting aims within institutions, and how these and other factors were reflected in marketing practices and in changing student learning environments.

1.2. Main findings

This report analyses the following facets of institutional responses to SNC and to conditions of increased student choice and competition: strategic uses of student number control by institutions (i.e. to grow, jettison or protect some areas of provision and other activities); changing institutional focus; changing marketing practices of higher education providers; changing student profile; teaching and learning; and responding to the student experience. Throughout, we have emphasised impact according to institutional type, and in relation to regional/local context, and institutional circumstances. The experiences of Further Education (FE) colleges that deliver higher education are considered within each category.

1.3. The strategic uses of Student Number Control

All institutions had to grapple with the new landscape created by SNC, though the impacts varied by institution type. For some pre-1992s the research shows that SNC led to strategic decisions to centralise admissions systems and thus remove a department's ability to make contextual offers where students had not achieved sufficiently high grades. This allowed pre-92 institutions to redistribute those numbers in two main ways: for subject disciplines likely to attract a Widening Participation (WP) intake to enable such institutions to meet their Access Agreement targets; and to enable institutions to continue to offer particular subjects (such as Modern Foreign Languages, and some arts and humanities subjects) in the interest of maintaining subject breadth despite those subjects attracting low numbers of highly qualified applicants.

Post-1992 institutions were affected, significantly in some cases, by the longer term effects of choice and competition (rather than directly by SNC): either because they lost AAB+/ABB+ students from their core allocation or because some institutions pre-empted any possible negative impact on allocated numbers by

¹ Although the White Paper used the language of two margins surrounding a core SNC, and 'core-margin' was a term used routinely by HE providers in this study, the margins worked differently and were administered quite separately by HEFCE.

withdrawing modules that had been shown not to recruit strongly, thus freeing up resources for more lucrative activities (i.e. other provision, or for research). Across the sector, this reportedly led to closure and rationalisation of some courses, and increased scrutiny of recruitment and retention, league table positioning, and NSS scores.

However, the research showed that post-1992 institutions continued to see buoyant numbers of applications and there was little reported evidence from either survey or interview responses of high grades applicants 'trading up' to higher status institutions, although there was a pervasive fear that this may happen under increasingly competitive conditions in the future. As a result, the logic of the emerging HE market meant post-1992s felt compelled to raise their entry requirements; reduce their part-time and sub-degree provision; and close programmes that had not recruited as well as they had in previous years, despite doubts that any of this would make that much competitive difference. Some post-1992s expressed fears regarding the potential negative impact SNC was having on the nature of the student learning experience and widening participation commitments, particularly in a context of lower student recruitment and higher fees.

FE colleges that provide HE generally welcomed the opportunity to bid for direct funding and the scope for modest expansion this gave them. They recognised, and in some cases welcomed, that this meant increased competition and less collaboration in college-HE institution relationships. College providers of HE in general felt they were well situated and more capable of agile responses to changing market conditions than their larger HEI competitors.

There are a compounding set of issues for specialist institutions, which are highly selective in most but not all of their provision. These generally have very small numbers overall, exacerbating the problem of limited room for manoeuvre within the SNC if they want to maintain the breadth of provision, or to develop new provision in areas that may not attract an ABB+ profile. As a consequence of this specialist institutions could apply for exemption from SNC.

1.4. Changing institutional focus

Many post-1992 institutions responded to the introduction of the 'high grades' policy by attempting to move 'upmarket' in the face of increasing competition for ABB+ students, often manifested in higher entry requirements. For some of our respondents this had the knock-on effect of reduced provision for part-time and sub-degree students. Post-1992 respondents reported that their institutions had to re-evaluate their relationship to the widening participation agenda that had, for most, been central to their institutional mission.

Pre-1992 institutions have, on the face of it, the least need to change institutional mission given that the SNC policy allows them to focus on their strengths; however our pre-1992 respondents believed that the pressure to expand their ABB+ margin constrained their ability to widen participation and to justify broader provision in subjects where few applicants have ABB+ profiles.

FE colleges that provide HE (referred to as FEHE institutions in this report), as the least autonomous sector considered here, have the least ability to plan a coherent future strategy in the face of forces they have little control of, however they do have the advantage of agility and make use of the flexibility that comes from not being dependent on HE numbers for their financial viability.

Specialist institutions reported the least turbulence, given their relatively small numbers and their stronger relationship to a mission defined by their narrower remits.

Several areas of institutional activity were reported to have changed as a result of longer term marketisation and in some cases as direct result of the number controls policy or higher fees. The employability of graduates was increasingly seen as important across the sector. For some of our interviewees the emphasis on Key Information Sets (KIS) including employability outcomes as reported in the Destination of Leavers from HE (DLHE) survey has been the key driver, while for others employability is now being more strongly linked in policy and public discourse to the raising of tuition fees. Employability has long been central to post-1992

institutions' offer and there was evidence that it was being further strengthened and made more explicit by its inclusion in taught modules or academic support tutorials. In contrast, there was evidence that employability was a comparatively new concern for pre-1992s whose institutional change of focus was articulated partly in relation to higher fees and partly in relation to vulnerable subjects, for example by the introduction of study-abroad placements in Modern Foreign Languages.

For post-1992s and FE colleges offering HE provision the rise of employability per se in public discourse has had less of a transformational impact, though there are reservations about the importance of DLHE outcomes as a reductive metric in institutional league tables that negatively affects the breadth of provision and the public perception of the value of higher education. Not only do these interpretations feed into a critique of the wider marketisation of the sector, the specific focus on the DLHE as the metric of employability negatively impacts on the opportunity for other approaches to be adopted by institutions.

The consolidation of courses and the reduction of provision in some post-1992s were related to an increasing focus on the improvement of the student experience and, in one example, to the freeing up of more staff to pursue research to support their submission to the Research Excellence Framework (the peer-review system by which research funding is allocated to institutions). All post-1992s were exercised to show enhanced quality, mainly in terms of NSS scores and their impact on league table positioning.

Retention of students is another area that post-1992s have been more concerned with in recent years. While retention is important in terms of continuity of income streams, student satisfaction and league table positions, the introduction of institution-set targets and benchmarks in Access Agreements that institutions have to contract with the Office for Fair Access (OFFA) since 2012-13 have also raised the importance of retention and success (OFFA 2011).

1.5. Changing marketing practices of higher education providers

All institutional types were reportedly reviewing their marketing and recruitment practices to target and attract particular groups of students, and this included an increasing scrutiny of perceived competitors, in particular through closer attention to the significance of NSS scores for some post-1992 institutions. There were some significant examples of pre-1992 institutions altering their marketing approach in a search for potential 'high grades' AAB/ABB applicants, for example by widening the geographical scope of their outreach activities and targeting areas with very high participation rates such as London and the south east of England. All expected their expenditure on marketing to grow in future.

When surveyed about institutions' plans to increase their differentiation from other institutions as a consequence of the changes to SNC and other financial changes, almost two-thirds of respondents indicated that their institution was planning to further differentiate, even though around half of them expected very little change in terms of additional student numbers. This suggests that enhancing institutional differentiation is a strategic goal in itself, particularly for post-1992s, regardless of potential financial rewards. Indeed, factors behind course rationalisation were largely to do with marketisation and market positioning and arose primarily as the result of choice and competition rather than as a response to the SNC policy.

1.6. The changing student profile

All institutions that contributed to this research noted that they had experienced greater volatility in admissions and enrolments as a result of SNC. This had resulted in differential impacts on disciplines, courses and mode of study with reports that part-time numbers were badly affected in all institutions but in particular at some FE colleges that provide HE. This latter finding on the decline of part-time numbers (which are not included in SNC) is borne out by other research which indicated that the numbers of students recruited to undergraduate part-time courses in England has fallen by 40% over the last three years, although the link between the introduction of SNC and part-time drop off is not found to be conclusive (UUK 2013).

Greater competition for ABB students has become the major competitive nexus between pre-1992s. Some respondents reported that this may exacerbate the under-representation of widening participation (WP) students at selective pre-1992 institutions and those post-1992 institutions who were explicitly planning to move 'up market' as institutions reduced their provision in courses most populated by WP students. Of course it was not only A level grades of AAB and above that were exempt from the SNC: equivalent level vocational BTECs and others including the Cambridge Pre-U, Access, Scottish Highers, and the International Baccalaureate were also exempted and thus open to unlimited recruitment. As many pre-1992s do not recognise BTEC qualifications BTEC-qualified students are increasingly clustering in post-1992 institutions, and in some cases were reported to be replacing applicants with A levels. BTEC students were considered by some to require more academic support to transition to degree programmes and were less likely to progress through the system. Therefore they were seen to represent both a cost and a challenge to post-1992s.

Overall just under half of respondents reported an anticipated raising of UCAS entry point thresholds, with a third of those surveyed reporting that this was specifically to react to anticipated changes in student application numbers. This may be taken to mean that institutions of all types are changing their student profile for marketing reasons linked in the main to league table position. As anticipated by *Students at the Heart of the System*, institutions are focusing efforts toward increasing their share of more qualified students and reducing their exposure to students with lower entry qualifications that might be more likely to drop-out, although many would have been doing this anyway due to increased student choice and, hence, competition.

The research found a strong correlation between urban locality and significant numbers of Black and Minority Ethnic (BAME) students for post-1992 institutions. Both post-1992s and Specialist Institutions indicated that their proportion of BAME students had been unaffected by changes to SNC. The much smaller proportion of BAME students in selective pre-1992s institutions was, likewise, unaffected by SNC but was due to a disproportionately higher number of BAME students applying for the highest grade science subjects and failing to meet entry requirements. While this supports findings from previous studies on the BAME attainment gap (Dhanda 2010; Singh 2011) the research indicated a concerted drive for new information regarding the disparities in BAME students vis-à-vis course distribution in order to manage admissions decision-making more finely.

Across all institutions, traditional patterns of subject choice by gender was evident in our research, confirming international (Vincent-Lancrin 2008) and UK (JUK 2012) research that, at undergraduate level, women continue to dominate in education, teaching, health and social sector subjects while men are more likely to be found in science and engineering subjects. The endurance of the gender-subject choice link was considered by some of our respondents to be a deterrent to applying for university for the particular group of young white males from low socioeconomic groups.

1.7. Teaching and learning

Almost all institutions involved in this research had recently undergone, or were planning to undergo, portfolio reviews in response to the emphasis on choice and competition. Institutions were found to be focusing on consolidating current provision. Expansion of HE provided by FE colleges related to existing courses and courses closely related to current provision, rather than to any development of new courses. There were variations in course rationalisation by institution type, subject and discipline, although STEM, Medicine, Dentistry and sciences were supported and valued as prestige subjects throughout the sector.

Course rationalisation had already taken place for some HEIs. One reported that a 'major reduction in low recruiting courses' and another said 'considerable rationalisation of courses across all subject areas' took place in 2011-12 in anticipation of the number control changes following internal review. Combined Honours and Joint Honours degrees were particularly vulnerable to closure given that many combinations attract small numbers of students, or 'appear to be less attractive in the marketplace', or do not recruit. For example, one post-1992 with a large Combined Honours programme was 'slimming down' its portfolio from almost 150 to less than 50 courses. Some post-1992 respondents also reported that their sub-degree provision was likely to be discontinued across all subject areas, in most cases because it had moved to their partner FE colleges. In

terms of mode of learning, the survey found a high number of institutions planning to increase work-based learning (58.3%) and online and sandwich courses (both 40%).

Enhancing face-to-face learning was seen as a key priority by institutional leaders. Central to this were innovative approaches to teaching and learning, and the improvement of campus facilities to provide social spaces and informal learning opportunities for students. These changes were unrelated to the student number control policy, but take place in relation to the marketability of the campus and the use of learning styles as a promotional device to attract students. Links between plans to change/ improve teaching and learning in order to enhance the quality of the student experience were evident.

Most institutions reported the increased use of technology to: free up more time for meaningful contact between staff and students; enhance student engagement to achieve better course identity and belonging; and promote genuinely dialogic modes of teaching and learning. The largest group of survey respondents thought there would be an increase in the use of VLEs. The purpose was to add to, enhance and innovate with face-to-face teaching and learning and to complement rather than replace face-to-face teaching. Overall, the research found that respondents' often passionate attachments to the use of staff-student contact time for interactive and collaborative learning were based on genuine attempts to foster staff-student partnerships, moves which contrast markedly with the quite widespread fears of how a 'monetized logic' (Ashwin 2012) might deform pedagogic relationships. One respondent felt that pre-1992 institutions had to 'work a little harder' than post-1992s to develop more flexible forms of student-centred learning. Significantly, given the decline in part-time take up noted above, there was evidence that some post-1992 institutions in particular were actively seeking to develop part-time online provision as a viable business opportunity.

Changes to teaching and learning were having (and were expected to continue to have) an impact on teaching and administrative staff. Over 57% of institutions surveyed expected some teaching staff to be redeployed; over 60% expected the use of sessional lecturers to increase; about a third (32.1%) expected redundancy will have 'some effect'; while 25% expected lecturing staff to have reduced hours, and over 40% anticipate the increased use of fractional contracts. Post-1992 institutions were more pessimistic than other institution types about the effects on teaching staff.

There was an impression that innovations in teaching and learning were being encouraged on two fronts. First, as a response to student demand with the hope that changes would 'bring the staff along', a view articulated in the comment that learning and teaching 'does need to be more cutting edge ... in that we're going to have to find new things to do, new ways of things being more flexible'; and second, in relation to an increased focus on staff development initiatives linked to an institutional push to encourage staff to obtain HEA fellowship status.

1.8. Responding to the student experience

Improving the student experience in response to evidence from national datasets, such as NSS, has been an integral part of institutional culture for HEIs for a number of years (HEFCE 2013a; Ipsos Mori n.d.). This makes it difficult to disentangle the Government's aim to lever institutions to improve teaching and learning via the public availability of easily comparable data on a limited number of indices (BIS 2011b) from the many initiatives institutions already have in place to enhance the student experience. Despite the considerable scepticism of some of our respondents about the NSS as a measure of quality, we found evidence that competitive pressures were encouraging institutions to pay much greater attention to their own (and their perceived competitors') data and the picture of the student experience of teaching and learning it represented, as anticipated by Gibbs (2012).

In terms of financial support for students, all institutions offered cash bursaries on the basis of need and, in some cases, these were combined with discounts, financial incentives and inducements to enhance learning (such as free iPads). Fee waivers were found by our respondents to be unattractive to their students. There was some evidence of increasing diversification in the range and number of pre-1992s' merit-based scholarships.

Ongoing investment in and enhancement of student services was related to two factors: one, institutional priorities regarding how to provide a better and broader range of support to students; and two, the projected increase in demand for student learning support (survey results indicated almost three-quarters of institutions thought demand overall would increase). Enhancing institutional student services were not related to perceptions that students wanted greater 'value for money'. In contrast, while enhancement of academic support, pastoral support and personal tutorials were viewed as effective means to promote students' skills, the fact that they were now incorporated as elements within Key Information Sets had prompted their use as aids to retention as well as a means to enhance students' personal development. Overall, inclusion of data in KIS was considered less significant than institutions' own internal, qualitative responses to these aspects of the student experience.

Our data disclosed some interesting relationships between space, student numbers and subject areas. There was a continuing shifting of resources to subjects that were expanding: for example, Science & Technology, Biomedical Sciences and Performing Arts were growing and having new spaces created for them. In some institutions, there was also a shift of focus within the utilisation of space, with many talking about increasing the flexibility of spaces to enable different forms of use. One institution, for example, reported moving away from fixed furniture in rooms with rows of computers to moveable desks and chairs on castors with laptops and mobile devices as a powerful way of reconfiguring space to promote more interactive delivery modes and to develop 'group working, social working, social learning, breakout groups'. Such innovations in physical infrastructure, while expensive, are justified by enhancing the opportunity for active learning.

All institutions voiced a commitment to enhancing personal tutoring and pastoral support for students as an important aspect of the student experience, partly because it can be included in KIS data (counted as contact time), partly to improve retention, and partly because these forms of support are seen to substantially aid students' personal development.

I.9. Recommendations

I.9.1. Recommendations for policymakers:

Government and the sector should develop better, more appropriate quality indicators than NSS and DLHE currently offer. The pilot of the National Survey of Student Engagement (HEA 2014) and the use of the NSS to enhance teaching and learning quality and promote reciprocal dialogue between staff and students (Buckley 2012; 2014) provide good practice exemplars which should be used to inform institutional change and refocus Government policy on the measurement of students' experiences of higher education.

In the new context of uncapped growth, Government should encourage closer collaboration between HEFCE and institutions to ensure that the range of provision more closely matches demand within a region.

Government should reduce its rhetorical emphasis on differentiation where it leads to the assumption that 'good' or the 'best quality' higher education can only be accessed at a few elite highly selective institutions that provide entry to just a few career pathways. There should be more concerted celebration of the good (and often highly demanded) provision offered by the vast majority of the sector and which serves the larger share of professions, occupations and students.

Government and the sector should consider funding transition support for applicants with BTECs and other equivalent qualifications, particularly with a view towards increasing progression of these applicants into pre-1992 institutions in a future context of uncapped numbers.

Government should consider a broader interpretation of the aims and purposes of higher education to achieve a more equitable balance between discourses of skills and employability and those which promote the pursuit of knowledge, the inherent value of subject breadth and the need to enhance social justice through widening participation among currently underrepresented groups.

1.9.2. Recommendations for the sector:

There should be concerted efforts to enhance the collation and monitoring of information regarding different dimensions of the student profile, for example gender, ethnicity, social class, in relation to UCAS entry points, subject choice and institutional type. Increasing knowledge of BAME patterns of application, recruitment and course distribution will be crucial for all institutions in the coming years; as will knowledge of the characteristics of the FEHE cohort.

The sector should consider introducing more sophisticated information sources within KIS; in particular there is a need for better, more appropriate quality indicators than NSS and DLHE currently offer, and the authors note that HEFCE is currently working on this with the funding councils under the aegis of the Higher Education Public Information Steering Group. Currently they fail to capture the detail that constitutes quality in teaching and learning and their broadness means they do not present a nuanced enough account of course differences.

The sector should look at ways to enhance the scope for schools and colleges to provide better quality advice and guidance to potential higher education applicants in view of the scepticism about the quality of KIS information and its role in informing choice and students' decision-making practices.

1.9.3. Recommendations for institutions

With the relaxation of the student number cap and the competitive pressure to close poorly-recruiting courses, institutions should consider reintroducing and/or expanding part-time and flexible provision. Given the removal of market constraints on the admissions processes created as a consequence of the pressure to maximise the number of high achieving students, institutions should refocus on their efforts to embrace contextualised admissions.

Institutions should continue with endeavours to press for recognition of the multifaceted nature of students' experience and consider taking up more nuanced ways of apprehending student engagement. Innovations in teaching and learning should be celebrated and, in an increasingly marketised climate, the 'smarter' uses of contact time should be shared via good practice forums.

The oncoming removal of number controls presents pre-1992 institutions with an opportunity to consider a wider range of entry qualifications, particularly BTECs and other equivalent qualifications exempted under the SNC regime.

The scope for UK or international expansion opened by the use of blended learning, distance learning, or learning via MOOCs should be considered in relation to student cohort markets (e.g. part-time), quality of provision and enhancement of learning, alongside a better utilisation of campus space or cost concerns.

1.9.4. Recommendations for further research

In the new context of uncapped growth and, in particular, the encouragement of new alternative providers into the market there is space for a programme of research focussing on the impact of further system differentiation. This should incorporate the impact on teaching, learning and student engagement/experience and any consequential impacts of tuition fee elasticity.

Case study-based research focussing on inter-institutional competition within selected locales, or within contrasting contexts, will be particularly important in the new context. This would provide 'on the ground' data of how competitive pressures are working. Such research will be especially timely in the context of the ending of number controls and the entry of new providers into the market.

Case study-based research focussing on the management of change in relation to admissions, course rationalisation, teaching and learning, and the student experience will be invaluable in revealing variation by institution type. These case studies could: a) provide examples of good practice in the management of institutional change; b) nuanced data about discipline and course-level impacts.

Research should be carried out into the feasibility of developing a compatible format for the presentation of qualitative data on the student experience (as currently undertaken in different ways by individual institutions) in KIS.

Research should be carried out into the impact of the removal of the numbers cap on the ways that institutions may be re-imagining their commitment to widening participation. More specifically, it would be opportune to investigate the impacts that raising entry requirements, discontinuing part-time and sub-degree provision and shifting outreach away from local cohorts might produce disproportionate effects for specific groups of widening participation applicants, i.e. under-represented groups such as students from low income backgrounds, some BAME groups, disabled students and those from care backgrounds.

2. Introduction

2.1. Context

The context for this research is the introduction of several reforms designed to change the ways that higher education institutions operate. The Government White Paper *Students at the Heart of the System* (BIS 2011) set out a new context for improving the student experience in English higher education based on consumer pressure on institutional behaviours, practices and, ultimately, systems. The following analysis of how institutions responded to SNC, choice and competition in relation to the student profile and the student learning environment draws on data from two sources, a national survey and a representative set of interviews with senior institutional managers. Together, data from these two sources provide the sector with the first comprehensive analysis of the strategic changes in approach and the rationales behind them. The research took place in a context of a volatile policy environment and the report highlights the complex effects of two concurrent and linked processes: one, the ongoing effects of marketisation and how institutional decision-making processes were inflected by the daily realities of a system based on choice and competition; and two, the traceable effects of the specific SNC policy in operation after 2012-13. The analysis provides valuable insights into ways in which institutions may act after the controls are removed altogether from 2015-16.

2.2. Background

The English higher education sector has grown rapidly in recent decades following a period of stagnation from the mid-1970s to the mid-1980s. With the return of economic growth and a relaxation of controls on the number of student places the age participation ratio (APR) (ie the proportion of 18-year-olds in the population in HE) more than doubled between 1988 and 1992 from 15% to 33% (Shattock 2008:192). Growth continued at a slower pace and had reached 37% APR by the time New Labour entered office in 1997; the new Government announced a target of 50% of 18-30-year-olds to have experienced higher education (by 2010) and introduced a new HE initial participation rate (HEIPR) measure to replace APR from 2008. Using this measure the young participation rate was 42% when New Labour left office in 2010. A cap on places was introduced by the Government in 2009, and despite its continuation under the Coalition Government from 2010, the proportion of young people entering higher education had reached 49% by 2013, with the growth accounted for by a reduction in the number of 18-year-olds in the population (HEFCE 2013b).

During the long-term growth period, participation has widened as well as increased, in the sense that the proportion of those groups historically under-represented has risen. The participation gap between the lowest and highest social classes and the most and least deprived areas, for example, had narrowed between 1995 and 2012. However this widened participation was largely limited to participation in institutions with lower UCAS tariff points for entry (HEFCE 2010) and in the last decade much policy attention has turned from generic aspiration-raising widening participation to the notion of 'fair access' which is focussed on the identification of the brightest young people from poor and under-represented backgrounds that may be encouraged to successfully apply to the most selective institutions. The HE financing review paper *Securing a Sustainable Future for Higher Education* (the Browne Review 2010) clearly anticipated a world in which institutions should be free to target their outreach and recruitment activities for their own competitive ends, rather than any wider societal goals of social justice. Much of the agenda was adopted by Government in the White Paper *Students at the Heart of the System* in July 2011. The following section situates this number control policy in the context of the development of self-financed tuition and attempts by central Government to manage public higher education expenditure.

2.3. Self-financed tuition - a short history

Systemic growth from the late 1980s necessitated a series of measures to introduce student-financed systems, initially by the replacement of student maintenance grants with loans from 1991-92 and then, from 1998-99, with a system by which students paid in advance for part of their tuition fees at a rate of £1,000 per year of

study. This was replaced in 2006-07 by a deferred payment scheme whereby variable fees were set at a maximum £3,000 per annum and graduates paid back loans (borrowed from the Student Loans Company - SLC) once they began earning over £15,000 per year. In order to offset the effects of the higher fee on applicants from under-represented backgrounds the Higher Education Act (2004) also introduced the Office for Fair Access (OFFA) to regulate on the basis of institutions' declared expenditure plans for mandatory bursary support and outreach. In November 2010, following the publication of the Browne Review, the Coalition Government announced an increased upper limit to variable tuition fees of £9,000 per year of study and a more progressive repayment regime, along with a new student support scheme, the National Scholarship Programme (BIS 2011a) to replace mandatory OFFA bursaries (McCaig and Adnett 2009; McCaig 2011).

2.4. Students at the Heart of the System

The overarching aim of *Students at the Heart of the System* was to make the sector more responsive to student demand through the application of market forces. Markets were to work in three main ways:

- 1 Variable tuition fees up to a new maximum of £9,000 were designed to open up a fee differential between those institutions that most satisfy the wants of students and those that least satisfy them. Combined with a liberation of student numbers (see below), hitherto distributed on the basis of 'block grant' in the form of capped quotas from HEFCE which institutions received "year-on-year regardless of what students think about the quality of teaching" (Browne 2010, 23), the fee market would reward excellence, provide incentives for others to improve, and for those institutions unable to justify high fees as applicants chose to study elsewhere, new providers would be licensed to compete with them for the student places. In the new regime, where the future of institutions is more closely related to students' judgements and choice: "We expect our reforms to restore teaching to its proper position, at the centre of every higher education institution's mission" (BIS 2011b, para 2.7). For such a market to work two further stages were necessary: the provision of market information; and a new system of competitive number controls in which an institution could expand to meet demand (or lose out due to lower demand for its provision).
- 2 The provision of market information to enable applicants to make more informed choices is central to *Students at the Heart of the System*. Key Information Sets (KIS), hosted by individual institutions, consist of four types of information: the course of study (for example, data on how satisfied previous students were with the course, how interesting teaching staff made the subject, the timeliness and clarity of feedback, the amount of contact time offered by staff and the assessment methods used, and which if any professional bodies recognised the course); costs (including tuition fees, accommodation costs and details of any bursaries and scholarships to offset costs for applicants from low-income backgrounds); post-graduation employment rates (containing information about the destinations and salary levels of leavers six months and 40 months after graduating); and the impact the students' union had on their higher educational experience (BIS 2011b, para 2.10).
- 3 SNC and exemptions for high achieving applicants. The system of student number liberation introduced by the White Paper was designed to reduce the student number control allocation for each institution (although leaving the number of students that could be recruited unchanged) in two ways. Firstly, a 'high grades' market effect was created by exempting the highest achieving applicants (those with AAB or equivalent and above in 2012-13 and those with ABB or equivalent or above from 2013-14) from the controls. This allowed institutions to recruit as many students with high grades "as they wish, and are able to, outside of their student number control" (HEFCE 2013c). Secondly, the 'core and margin' policy initially enabled the removal of another 20,000 places reserved for providers willing to offer HE at (or below) £7,500 per year of study (thus attempting to match quality and price on the basis of 'value for money'). This margin was reduced to 5,000 places for 2013-14, although these were an additional HEFCE allocation of places. HEFCE made 'core protection' allocations to ameliorate the effects of the 'high grades' policy and mechanisms to protect strategic and vulnerable students impacted by 'core and margin'. However, the combined effect of the 'high grades' and 'quality and value' margins was to reduce by a third the total places

available within the overall numbers cap, potentially squeezing the SNC allocations to institutions unable to attract those with the highest grades or unwilling/unable to lower tuition fees (McGettigan 2013; UCAS 2013).

Alongside this, the White Paper emphasised the quality of the student experience. The aim in 'putting Students at the Heart of the System' was to use student choice to create the market conditions for a "more responsive system" (BIS 2100b: 5). The dynamism expected to be generated by increased student choice would then find fruition in a wider range of learning modes and a greater focus on teaching quality. The White Paper proposed that the public availability of comparative standardised information on courses in Key Information Sets, and other sources of public information, would empower students. HEIs were also encouraged to have student charters to encode the entitlements, expectations and responsibilities of staff and students.

The importance of access to relevant information by applicants and opportunities for all types of provider to compete in the HE marketplace was acknowledged when the Office for Fair Trading (OFT) issued a call for information in October 2013, "to gain a better understanding of whether universities are able to compete and respond to students' increased expectations, and whether students are able to make well-informed decisions, which would help drive competition" (OFT 2013:3). HEFCE responded by stating that the market mechanisms introduced by *Students at the Heart of the System* ensure that the "regulation of the higher education (HE) sector in England is framed to create as much diversity, flexibility and competition as possible" (HEFCE 2013d:1).

Institutional responses to 'students-as-consumers' and HE as an increasingly competitive market are reflected in a growing body of research which explores the relationship between the National Student Survey (NSS) and the student experience and, in particular, considers the links between student engagement and improvements in teaching, learning and assessment (Trowler 2010; Gibbs 2012). Studies on the NSS, as an indicator of student experience, have highlighted some methodological issues regarding accuracy of data collection methods, question design, and validity of students' response style (Yorke 2009), as well as the consistency of data for comparing courses and improving teaching and learning quality (Fielding et al 2010). Such critiques of the shortcomings of the NSS are, however, supplemented by empirical studies which focus on specific aspects of the student experience in some detail. Notable among them are Baranova et al (2011), whose study is one of the few to look at how university administration and support systems can enhance the student experience; Cheng and Marsh's (2010) study of students' evaluation of teaching; research on forms of effective feedback (Mendes et al 2011) and Flint et al's (2009) study of engaging students in dialogue about NSS scores.

A third, albeit small, body of research is emerging which critiques the relations between the NSS and the student experience from a more philosophical standpoint. In these studies, marketisation is seen as altering (perhaps even deforming) the nature of what higher education is and what a university is for (Collini 2012). In this more reflective vein, studies have highlighted the role played by pedagogic processes rather than outcomes in improving the student experience (Staddon and Standish 2012), others emphasise the transformative role of disciplinary knowledge (Ashwin 2012), while others situate the student experience as part of a wider, holistic account of changing student identities throughout their higher education studies (Bryson and Hand 2007). There are also reflections on the democratic impetus which informs some student consultation process (Taylor 2012) and accounts of the role of ethics in enhancing students' experiences (Taylor and Robinson 2014).

The use of the NSS to influence changes to teaching and learning as a means of enhancing the student experience is ubiquitous in institutional and policy discourses; yet at the same time the NSS is a highly contested instrument, and the alignment of its scores with the 'reality' of the student experience is treated with suspicion by many academics (Furedi 2012; Sabri 2013). Nevertheless, it has had, and continues to have, a notable and specific impact on teaching, learning and assessment practices (NUS/QAA 2012). Given the longevity of the NSS and the rolling nature of many institutional strategies for managing and enhancing the student experience, it is difficult to causally link changed institutional behaviour in these areas with the

changing HE landscape created by the 2011 reforms and new tuition fee/repayment regime since 2012-13. It does, however, mean that institutions already attach considerable significance to the student experience as reported by NSS results and are more likely to be taking steps to further enhance the student experience in an increasingly competitive higher education climate.

2.5. The early impact of *Students at the Heart of the System*: the demise of number controls in England

The introduction of the most recent student number control policy had not led to the anticipated market differentiation in fees or a general redistribution of higher achieving students (those with ABB or above) within the sector according to our respondents. This realisation no doubt influenced the decision to abolish SNC from 2015-16 and fund an additional 30,000 places in 2014-15 in the December 2013 Autumn Statement (HM Treasury 2013), something not anticipated by research participants in the months beforehand, the majority of whom hoped for a period of stability. The context for this report, then, to some extent shifted from an analysis of the early impacts of a Governmental experiment in market making to a policy post-mortem.

Why then did the market fail? Or rather, why did Government lose patience with their experiment of increasing flexibility? The answer, in part, may be that demand for higher education places still exceeded supply, with acceptances up to a record level: 495,600 full-time undergraduates in the UCAS 2013-14 admissions cycle (from 677,400 applications) exceeding the previous high of 492,030 in 2011-12 (UCAS 2013). Any downward market effect on prices was unlikely in these conditions. Average tuition fees for 2013-14 were £8,507 (£8,263 after fee waivers) (HEFCE, 2013b), virtually unchanged from their 2012-13 levels.

Even at the higher achieving end, demand remains high in those post-1992 institutions that might be expected to have reduced fees because many of the equivalent-to-ABB qualifications are BTECs that have not been considered for access to many of the more prestigious institutions (UCAS data in Grove, 2013). Overall in the first two years of the new financial regime and the operation of SNC, there had been little reported redistribution in student numbers from one part of the sector to another, with AAB and ABB redistribution largely taking place between pre-1992 institutions. HEFCE analysis from 2011 on the distribution of AAB+ students by mission group found that a redistribution of AAB+ places would be unlikely to make any impact beyond the selective pre-1992s institutions (Russell Group and 1994 Group universities) because most applicants with AAB+ grades already attended these institutions. Of 22 HEIs that enrolled over 50% of student AAB+ profiles in 2011, 17 were members of the Russell Group or 1994 Group and the other five were specialist colleges of higher education covering the arts, dance and music (HEFCE 2011). None were general universities from the other mission groups. The situation is also clouded by the fact that applicants with A-levels are currently a declining demographic (Morgan 2013; Matthews 2013) and the fact that UCAS reports a higher proportion of lower qualified students (i.e. BBB or below) at selective pre-1992 universities than in previous years (UCAS 2013). The research presented in this report illustrates the extent to which arts, humanities and social sciences (the subject disciplines least likely to require ABB or above even at the most selective institutions) can be threatened by a concentration only on a margin consisting of 'high achievers'.

This most recent number controls policy may, therefore, be seen historically as a policy intervention which focused on just a few variables: the number of students with ABB+ profiles attending selective institutions; the tuition fee charged by institutions to stimulate marketisation; and consumer choice in the system as measured by pre-existing instruments such as the NSS and the Destination of Leavers in Higher Education (DLHE).

The key question is whether the policy was abandoned because it had failed to produce the required market differentiation quickly enough (e.g. to reduce fees and thus public expenditure) or whether it had failed because the emphasis was on the wrong variables and thus led to unintended and undesirable consequences. This report goes some way to answering this by exploring the complexity of admissions decision-making processes, the interaction of competing and often conflicting aims within institutions, and how these and other factors were reflected in marketing practices and in changing student learning environments. Other possible

explanations exist, of course, for the policy 'failure', including that the abandonment of SNC provides an opportunity for further liberalisation of the sector by opening higher education to all students who are able to achieve the requisite grades. This expansion of places across the wider sector may indeed reduce the average tuition fee over time by increasing supply so that it meets or even exceeds demand, but is unlikely to have any impact on the destinations of those with high grades, one of the key aims of the policy.

As for other aspects of *Students at the Heart of the System*, such as the impact of enhanced information on applicant and institutional behaviors, this research explores the extent to which the sector is reacting to this new context. With regard to KIS (fully operational from 2013-14) new applicants also have access to an improved version of Unistats, a centralised website service funded by HEFCE and the other UK funding bodies (since 2007) that collates and presents annual NSS results, subject area graduate employment destinations, UCAS entry points required for each course, and a demographic profile of students on that course. However, it should be noted that all these information sources have been in use for several years so KIS represents only a new way of collating and presenting market information, with little new information per se. For example the DLHE has been in use since 2002-03 and NSS since 2005, and institutions have been responding to them, to the extent that student satisfaction has risen from 80% to 87% on average across the sector (HEFCE 2013a).

The following evidence therefore represents progress from a rolling starting point and on many issues reflects changes enacted in response to the wider marketisation agenda and a longer-term acknowledgement of the notion of the 'student-as-consumer' as well as the impact of the student number control policy.

3. Research design

3.1. Methodology

In order to map and evaluate the impact that changes in SNC and increased fees are having on the student profile and the student learning environment, the methodology reflected a dual emphasis: to gather data on institution-level planning; and on the course-level impacts of such planning on the student learning experience. This enabled the researchers to analyse national comparative data and to subsequently explore key issues in more depth.

The research used a mixed methods design incorporating a national survey and subsequent in-depth semi-structured interviews with a selected representative sample of different HEI types (pre-1992s, post-1992s and specialist institutions) and FE colleges with a large proportion of HE students. This mixed methods design offered a number of strategic and pragmatic advantages, primarily in providing scope to obtain different data sets to meet clearly delineated but related research purposes. The sequential nature of the research design enabled a quantitative, comparative, national analytic mapping to be followed by small-scale qualitative research which generated significant detail, depth, and specificity, thus enabling the production of a more finely-grained and nuanced account than would quantitative or qualitative approaches alone provide (Ritchie and Lewis 2003).

3.2. Research aims and key questions

The research aims were to explore the ways in which increasing pressures towards greater competition and choice were impacting on the student profile and student learning environments through the student number control mechanism. The research questions were therefore shaped in relation to the following set of contexts and circumstances:

- the new maximum variable fee of £9,000 for full-time undergraduate programmes which enables institutions to reposition themselves by price-setting;
- changes to fees and financial support which potentially determine or change the character of the student profile in that institution;
- the use of Key Information Sets and, in particular, the NSS and DLHE datasets to inform both market positioning and organisational resourcing for teaching and learning;
- changes in the relationship between HEIs and partner FE colleges that offer higher education courses - and private alternative providers whose courses could be designated for student support at the discretion of the Secretary of State the impact of the core-margin policy on the student learning environment in relation to course closures, course contractions and reconfigurations;
- changes to the organisation and delivery of teaching and learning arising from course consolidation;
- the ways in which study support and space allocation are being reconfigured in relation to changes in courses or shifts in modes of teaching and learning, for example, the increased use of online or blended learning and changes in building usage;
- the reconfiguration of HE as a consumer-/student-led market and its potential impact on the nature of teaching and learning and for staff resource and allocation;

- changes to patterns of financial support packages to students who qualify by income for the maintenance grant as a result of the introduction of National Scholarship Programme (NSP) awards in place of mandatory OFFA bursaries; this focussed financial support on far fewer recipients and thus reduced overall support (HEFCE 2012 and McCaig 2014);
- changes to institutions' outreach priorities as outlined in OFFA Access Agreements (BIS 2.11c) and how these are reflected in a reconfiguration of institutions' marketing practices.

These questions helped inform later stages of analysis and develop thinking on several key issues that are thematically analysed in this report: strategic uses of student number control by institutions (ie to grow, jettison or protect some areas of provision and other activities); the changing institutional focus; changing marketing practices of higher education providers; the changing student profile; teaching and learning; and responding to the student experience. Throughout, we have emphasised impact according to institutional type, and in relation to regional/local context, and institutional circumstances. The experiences of further education (FE) colleges that deliver higher education (FEHE throughout) are considered within each category.

3.3. Methods

The initial stage took the form of a survey of senior managers in all English universities and further education colleges with significant HE. The census cohort was HEA contacts at pro-vice-chancellor level (HEA PVC Network) and their equivalents in the further education college sector. The survey method was an online survey offered via a secure URL embedded in direct emails to the HEA network and was carried out during April and May 2013. The survey contained questions covering changes to undergraduate recruitment numbers as a result of SNC; changes to student profile; impact of fees on recruitment; anticipated changes to course provision; changes to course delivery modes; and effects on staff. Additional questions were included for FE college respondents only. The overall response rate was 19% of 173 institutions surveyed: 21.5% of HEIs (28 out of 133); 12.5% of FEHE institutions (five of the 40 that are HEA members). The 28 HEIs were fairly representative of the distribution of institution types in the sector. While the response rate is reasonably in line with other such surveys in the HE sector it is low enough for us to be cautious about generalisations; however it is large enough to gain some key insights into the overall landscape and how institutions were responding to changes in a volatile climate.

Following on from the survey, and in order to explore emerging themes in more depth, the second phase comprised interviews with senior managers responsible for implementing and effecting institutional change strategies, for example strategic managers at PVC, dean or vice principal (for FE colleges) level. The semi-structured interview schedule consisted of seven sections designed to pick up the impact of number controls, choice and competition in relation to: student profile and institutional market positioning; relationships with partners; fees and student financial support; courses of study; teaching and learning; the management of SNC in the institution; and staff-student relations.

HEI interviews were carried out face-to-face by the authors during the Autumn of 2013; three FEHE interviews were carried out at an HEA event for HE managers in the FE sector in April 2013 and data were also gathered at that event from a focus group of senior managers representing three other colleges, providing rich qualitative data from five FECs with varied profiles, relationships with HEIs and experiences of the reforms. Some of the HEIs generated more than one interview and in total our qualitative analysis benefitted from the contribution of 17 individuals from 13 institutions. Three of the HEIs were from pre-1992 universities, three were from post-1992 universities and two were from more specialist institutions. In the majority of cases interviewees volunteered their contribution via the survey; others were approached in order to achieve a sectoral balance between institution types. The spread in terms of type of institution, although slightly over-representing the FEHE sector when the focus group information is included, means the research provides an adequate expression of the issues concerning number controls, choice and competition from the perspective of the different providers within the HE market.

Interviews captured in-depth accounts of institutional decision-making practices regarding the implementation of SNC and on the use of strategies for managing consequent change at departmental and subject level.

Interviews provided data on the complex 'background' relations between SNC, aspects of the new financial regime (including fees and levels/modes of student financial support) and institutional drives towards differentiation via branding and marketing. They also provide insights into the relation of these factors to the student experience and matters of teaching and learning.

3.4. Attribution

In the report respondent attribution uses the following protocol: data from selective pre-1992 institutions is labelled **Pre1, 2, 3** etc; from post-1992 institutions **Post1, 2, 3** etc; from specialist institutions **Spec1, 2** etc; from FE colleges with HE provision **FEHE1, 2, 3** etc. In some cases the attribution also indicates area of responsibility, for example **Pre1, planning** gives an indication of the operational role of the respondent. This is used where: it clarifies the perspective of the interviewee; it clarifies the context in which the response was given; and to differentiate where the views of more than one person from that institution were gathered. The research was conducted in accordance with institutional and British Education Research Association (BERA) codes of ethical practice. All respondents consented to participate on the basis that information provided would be anonymous and confidential and that their institution would not be identifiable in any reporting or dissemination.

3.5. Analysis

Survey analysis took the form of frequency analysis, cross-tabulations and breakdowns by institution type. Survey open question analysis was carried out via thematic coding. Interviews and focus group discussions were transcribed verbatim and analysed using a two-stage process. Interview data were initially coded by both authors into 26 thematic fields using an analytical matrix. This was followed by analytical grouping and data reduction into seven key themes.

The subsequent sections of this report deal with six of these seven themes in turn. Each section reports on one facet of institutional responses to the number control mechanism and to conditions of increased student choice and competition, although it is important to bear in mind that each facet is part of a complex nexus of interlinking forces and factors:

- the strategic uses of SNC
- the changing institutional focus;
- the changing marketing practices of higher education providers;
- the changing student profile;
- teaching and learning;
- responding to the student experience.

The seventh theme focused on the experiences of FE colleges that deliver higher education. Some of these responses have been included in each theme where relevant. A fuller account of how FE colleges with HE provision are responding to SNC and the intensification of market conditions for higher education providers is considered in a separate case study. Throughout, we have emphasised impact according to institutional type, and in relation to regional/local context, and institutional circumstances.

4. The strategic uses of Student Number Control

The ways in which institutions reacted to the SNC variant introduced from 2012-13 varied by institution type. The design of the SNC policy was intended to stimulate a market distribution of places at the 'high grade' and 'quality and value' margins (BIS 2011, para 4.18, 4.19). This inevitably led to the greatest impacts affecting those institutions looking to increase their share of AAB+ (and later ABB+) students and those who would be seeking to bid for the 20,000 removed from the core allocations. So while the SNC policy was something all institutions had to accommodate and come to terms with, for the largest group of middle-ranking post-1992 universities it necessitated less strategic change beyond that which had been stimulated by the general move to a more marketised system over several years. For the selective, research-intensive pre-1992 institutions and the FEHE sector, the market policy necessitated a strategic rethink of a higher order.

For pre-1992s the immediate impact was a realisation that their core allocation - SNC - was becoming a minor part of their overall undergraduate intake, with each of our pre-1992s reporting that around 80% of enrolments were exempt, i.e. students with ABB+ (or equivalent) by the second year of operation (2013-14). Therefore under SNC the recruitment of as many ABBs as possible became the major competitive nexus:

“... the biggest proportion is outside the student number control and that, of course, makes us vulnerable because that's the fixed population, that's the one that everybody wants. So if places that recruit more strongly than us ... decide they want to expand, then it's that population they're going to expand from and so we're vulnerable in terms of our ability to recruit from that population. So that's the thing which has exercised us most as a result of the student number control”. (Pre2, planning)

The key issues around the remaining core SNC is that those numbers were not always evenly distributed around the provision these institutions wished to offer, nor was the core always reported to be sufficient to allow them to continue to meet their institutional mission if more places went to applicants with AAB/ABB+. Two major, and sometimes overlapping, strategic approaches were reported by interviewees from pre-1992 institutions: those designed to maintain a commitment to widening participation; and those designed to maintain the breadth of provision. Both approaches necessitated policy change at various levels within institutions.

4.1. Protecting widening participation and fair access

While it should be noted that there is no necessary correlation between candidates with sub-ABB profiles and widening participation students (those from lower social classes, low participation neighbourhoods (LPNs) and other under-represented groups such as some black and minority ethnic (BAME) groups, those from the social care system, disabled and mature students) it was generally accepted in the sector and by contributors to this research that WP students are under-represented in selective pre-1992 institutions (OFFA 2010; HEFCE 2013b) and that SNC was likely to exacerbate inequalities of access (e.g. the Independent Commission on Fees 2013; McGettigan 2013; McCaig 2014). Often the distribution of ABBs was skewed heavily towards some disciplines (sciences, Subjects Allied to Medicine) that recruit quite strongly from WP backgrounds, while other disciplines popular with those from non-WP backgrounds (arts and humanities, social sciences for example) are less likely to recruit those with ABB or above. Institutions thus have to balance the desire to maintain WP and other commitments, such as to offering opportunities to EU students, with the desire to maintain subject breadth.

Pre-1992 institutions consulted in this research noted a squeeze of places for widening participation students as a result of the wider institutional strategy to increase the proportion of ABB+ students:

“[It's not just about SNC but] our key target is to generate more applications from the higher achieving students ... So with the student number control we've not had as much flexibility ... and I think the first year of SNC probably squeezed some of those [WP] students out.” (Pre1, widening participation).

In order to protect WP, institution Pre1 made two changes to the way students were selected and how departments dealt with sub-ABB applications. The first strategic decision was to widen the geographical scope of its outreach:

“Within the last six months we’ve had new recruitment officers join our team and the aim of that really has been to boost the capacity that the recruitment team has got to work with schools on a national basis ... So that’s been the kind of approach that we’ve been taking and my team’s responsibility in a nutshell is to generate applications.” (Pre1, widening participation).

The importance of this became more apparent in the second year of SNC when, for some², the margin rose at the expense of the core. One pre-1992 respondent noted that in 2012-13 "we were admitting 50%-60% of applicants with A-levels at AAB or above and [in 2013-14] 80% or so of applicants with A-levels with ABB or above" (Pre1, planning).

The effect was further exacerbated by the decline in the number of 18-year-olds in the demographic, which one respondent pointed out was actually being used by Government as an endorsement of the number control policy:

“I think the broader impacts in terms of last year’s entry, more major impact on the institution have been because of the introduction of fees and the impact of the demographic shift and fewer 18-year-olds in the country. The Government is ... making noises that the SNC has been very successful because everyone’s got into their first choice [institution], but of course has everyone got into their first choice because fewer students are there.” (Pre1, planning)

The second key strategic change was to shift responsibility for allocations away from academic departments, in effect centralising the admissions function. This meant departments no longer had the freedom to adjust their own minimum admissions criteria to fill places:

“Last year we allocated SNC out to departments and I think that caused a fair bit of concern if you like when it was being done because everybody was fighting for the numbers, but actually it didn’t necessarily work in the most effective way. So this year the numbers we kept as a sort of more of a central pot and allocated on more of a needs basis rather than just because a department wants them and I think that is probably the way it will continue.” (Pre1, widening participation).

“We’ve got a flexible admissions policy, and that preferences WP applicants where possible, depending on whether the course is recruiting or selecting that would mean a lower offer or being preferred for a standard offer or potentially just being taken into account as one of many factors. ... for 2012 entry we actually changed this policy and that was directly related to student number control, prior to 2012 entry academic schools could choose for themselves whether they wanted to make a lower offer or not ... it seemed sensible to try and, well, align the WP policy a bit more with student number control which meant in effect that academic schools shouldn’t waste lower offers if they didn’t need to.” (Pre2, widening participation).

This enabled the redistribution of places from the centre to other provision, in this case to subject areas more likely to attract a WP intake. Despite this apparent threat to departmental autonomy with regard to admissions decision making, institutions reported most staff could see the benefit of maintaining WP as part of the institutional mission and the importance of maintaining breadth of provision, along with commitments to places for mature and EU students. One interviewee noted that with the combination of a more centralised system and the expansion of the margin to ABB+ there was actually more scope for WP: "There’s more room for WP students to come to somewhere like here because you give them a bit more chance to get in as ABB." (Pre2, widening participation).

² HEFCE provided the most highly selective institutions with a fair access protection allocation <http://www.hefce.ac.uk/whatwedo/lt/howfund/studentgrades/>

Another pre-1992 respondent also felt that WP had not been negatively affected by the introduction of SNC:

“I feared that, I predicted we would and we haven't, in fact it's the reverse ... students have started taking much stronger thought about their higher education. [They] are now much more committed when they make the decision to come and therefore are clear about what they're looking for.” (Pre3)

One of the reasons for this is that, given its subject mix, institution Pre3 recruits many BTEC students (higher BTECs are exempted from SNC and thus included in ABB+) which are statistically more likely to be taken by WP students. The issue then becomes about transition:

“We exempt BTECs ... and we have found in the past that BTEC students haven't performed as well. But clearly because of the SNC rules, BTEC students are one of the areas where numbers have expanded. So we're looking at that but I have to say our experience to date hasn't been tremendously good so it's kind of, yes we are open to that area ... I think it's clearly the whole area on SNC has opened up a debate about BTEC now and how they prepare students for university.” (Pre3).

Widening participation is clearly of greater importance to post-1992 and FEHE institutions, however given the far smaller proportion of their students in the ABB+ margin, WP was not found to be as immediately threatened by the first two years of SNC, although respondents reported that WP had been harmed by the longer term effects of choice and competition and the fear that SNC would have a negative effect beyond the first two years was routinely expressed. There were, as we shall see below, other aspects of the reforms that related specifically to these institutions.

4.2. Protecting subject breadth

As noted above, strategies designed to protect WP and those designed to maintain subject breadth often overlap for pre-1992s. Key themes identified by interviewees are pressures from SNC and other marketisation aspects of the changing landscape that challenge the notion that equates prestigious institutions, the most selective provision and the most qualified applicants at the pinnacle of the market. This is the assumption behind using a 'high grades' number control policy to engineer a differentiation of tuition fees, with the choice of those applicants with high grades driving the system, and institutions able to offer higher grade places winning out in the marketplace by attracting that particular group of students. Meanwhile, other institutions would be obliged, by the pressures of the market, to lower their average tuition fees. The missing element in this supposition is that many of the most prestigious institutions see it as part of their mission to offer programmes of study in subjects that, in fact, do not require ABB+, such as Modern Foreign Languages, Education, Social Work, Archaeology and the arts, yet which are in high demand from non-WP applicants. Given this situation, pre-1992 respondents often found the mechanism of number control difficult to accommodate alongside notions of autonomy and transparency:

“The capacity is different by programme, programme by programme and we'd already gone to ABB as standard and some programmes are clearly A* and even the programmes which take A*s/As, still have some SNC because you still get absolutely excellent students coming in that don't meet the equivalent measures. So there's always a small number even on those programmes. The trouble is that if you just push into that area there are some areas which strategically are not going to recruit large numbers at ABB+ and equivalent ... So clearly we need to strategically use that.” (Pre3)

“We have some areas of the university which are in subjects which, again historically, have not recruited as strongly as others. It's harder to get good computer scientists or sociologists than it is to get lawyers and economists ... At the moment the university takes a very strong view that we're a broad-based university ... at the moment there's no discussion around the possible closure of any particular subject area.” (Pre92, planning).

An alternative approach was taken by Pre3; here the strategy was to maintain subjects made vulnerable by SNC while retaining a decentralised admissions (and thus SNC allocation) system:

“Because of the deregulated ABB+, because what you've got is a competitive market in ABB+ where you have to use more efforts into conversion [from application to admission], it's a much more personalised

process now, it's the follow-up, the postcard and all these things that you'll find all institutions doing, so we're not unique in that, but that has changed our behaviour.” (Pre3)

Primarily concerned with subject breadth, institution Pre3 had undertaken a review of all its undergraduate programmes once the core-margin policy was announced in 2011 and became aware of a downward trend in the uptake of Modern Foreign Languages at secondary school level which was feeding into enrolments (Pre3). The conclusion drawn was that the Russell Group's list of 'facilitating subjects' (which includes MFL) (Russell Group 2011) was negatively impacting on schools' behaviours by over-focussing on just a few of these subjects:

“So when I've talked to schools, this is local schools, they were saying they're already detaching at GCSE and that the eight facilitating subjects ... are becoming more popular where there's a choice and that's, I think parental influence. So in that sense you see a narrowing of the choice at GCSE which can only feed on to A-level.” (Pre3)

For pre-1992s the impact of core and margin was clearly more mixed than may have been anticipated by policymakers. Respondents spoke of increasing complexity around the allocation of a shrinking core and how this has been reflected by a tendency towards a more centralised admissions decision-making process and the removal of a degree of flexibility of offer. While autonomous departments could historically reserve places for those that unexpectedly fell below the required grade, core and margin often restricted recruitment only to those that meet the grade, with the spare numbers clawed back by the centre to use either for subjects likely to attract a WP intake (and thus allow institutions to meet Access Agreement targets) or for subjects the institution wishes to offer despite low numbers of highly qualified applicants. In this sense the harsh light of the market exposes the degree to which prestigious institutions - which often claim the inviolability of high entry grades as a reason not to 'socially engineer' places for WP students - may use the symbolic 'brand effect' of high grades selectively.

4.3. Strategic responses among post-1992 universities and specialist institutions

As the survey findings suggested, many post-1992 institutions responded to SNC by attempting to move 'upmarket'. This was manifested in several ways: by raising minimum entry requirements; by dropping part-time and sub-degree provision (even though neither were part of number controls); by closing programmes that have not recruited as well as previously; and by attempting to incentivise applicants with guaranteed offers, sometimes with financial inducements. The emphasis on securing as many AABs and ABBs as possible was important, though given the preponderance of these higher achieving students in the pre-1992 universities even before the high-grades policy implementation (HEFCE 2011) and the continuing high demand for places in HE (following a dip in 2012-13) there was a sense among those interviewed that the longer-term outcomes may be more detrimental to their institutional business models and missions if the size of the high grades margin were to continue to increase at the expense of the core. There were a separate set of issues for specialist institutions, which are highly selective in most but not all of their provision, and generally have very small overall numbers, exacerbating the problem of limited room for manoeuvre within the system if they wanted to maintain the breadth of provision. Specialist institutions could, however, apply for exemption from SNC as one of ours had done successfully.

Post-1992 respondents rationalised the raising of entry requirements in various ways. For institution Post1 it was part of a general and longer-term mission to raise the institution's position in league tables. In stages from 2009-10 this institution had raised its average UCAS tariff points for entry from 210 to over 300 by 2013-14 (Post1). Almost half of institutions surveyed for this research anticipated a raising of thresholds; by subjects this varied from 47.8% raising the threshold for subjects allied to medicine/health-related down to 39.1% for humanities and 39.3% for arts provision.

One knock-on effect of moving upmarket within a capped system is that any additional higher tariff students replace other provision, often at the expense of the breadth of provision and provision that was specifically designed for less qualified and often mature students:

“I think what we found was that some of our conventional markets are more price sensitive than others and so I think that for us, and there’s an implication here from the student number control bit rather than just the fees bit, there is a strong feeling that we might start targeting AABs and ABBs which have not been our traditional marketplace for more conventional three-year degrees rather than foundation degrees, HNDs and the part-time stuff.” (FEHE3)

What this provides insight into is how the longer term effects of choice and competition impacted on part-time students and provision for them, given that part-time students were excluded from SNC. This, though, does not detract from the point that the logic of moving upmarket is of course partly driven by the squeeze on AAB and ABB numbers from institutions higher in the league tables. In the case of Post1 this was manifested in a reduction in applicants with A-levels:

“... we have seen a shift from students coming in with A-levels or AS-levels to those coming in with BTECs and that I think produces its own challenges because the success rate of students with BTECs or their progression rates are not the same as those with A-levels and AS-levels ... this is probably a reflection of course of what else is happening in the marketplace, where if other universities which are higher up the pecking order if you like for us, are creaming off perhaps more A-level students and also that the demographics are showing that there are more potential students coming through with BTEC qualifications”. (Post1)

More generally there was awareness that attempting to attract more ABBs at the expense of the core could become a strategy with diminishing returns where it was adopted generally by similar institutions: institutions might "get squeezed out of the squeezed middle" as one post-1992 representative put it (Post1). There were also other considerations: the need to simultaneously maintain existing income streams in order to sustain the breadth and range of existing activities was always to the fore, as was the potential impact on widening participation. The fact that some post-1992 institutions were discussing the potential effects of relying less on their WP reputations was acknowledged in this candid appraisal of any future trade-off:

“I think there is a pressure point [around widening participation] there because I know that the governors are very keen on the widening participation, widening access, local community role agenda, versus the fact that of course if you look at our numbers at the moment, we exceed all of our benchmarks on widening access, flow of participation neighbourhoods, BAME, percentage state schools, mature students ... So losing some of those numbers would not probably make a very big significant impact on that agenda per se, well in terms of those benchmarks anyway.” (Post1)

Institution Post2 was mainly concerned about the potential impact on WP from the combined effect of aggressive competition among institutions and the consumerist behaviour of applicants who find they achieve better results than anticipated:

“I think it’s amazing how many [applicants] jump ship once they know they’ve got the grades. So that issue will manifest and I think we will see universities who wouldn’t have taken students with lower grades more amenable for doing so if they feel the SNC is at risk in any way and I think it will be ... survival of the fittest, it’s going to be really quite Darwinian.” (Post2)

This had resulted in the institution considering making unconditional offers to applicants that have nominated their institution on UCAS forms. Many might see this as working to reduce choice for students by attempting to impose an obligation on young people who could potentially have gone on to more prestigious institutions; thus "taking the worry away" (as it was put by Post3) may make it easier for such institutions to manage the admissions process and secure income streams but hardly sits well with the rhetoric of informed consumers making rational choices in Students at the Heart of the System. Competitive pressures in this sector of the market were thought by many to threaten WP because of the additional pressure to maintain income and demonstrate improved retention and success rates. The market effect meant that "the business model is absolutely simplified: recruit, retain, recruit, retain" (Post2).

As noted, another effect of competition for post-1992s was the reduction of provision. This was most starkly rationalised by the interviewee from Post3:

“We go into quite a lot of analysis and get reports from the module leaders. Sometimes it's a one-off, sometimes it's a recurring problem. We've got rid of courses that are not performing, we've got rid of modules that, we refer to them as the 'grim reaper' modules that were tripping up far too many students and damaging their chances of really getting a good degree ... I'm not exaggerating if I said we had probably about 500 undergraduate courses, there were different combinations, we now have 120.” (Post3)

While overall numbers in fact remained buoyant for post-1992s and interviewees reported few actual instances of applicants 'trading up' to higher status institutions, the fear that this may happen in the future was pervasive. Therefore there was a certain logic for post-1992s, in particular, to anticipate this by raising their own entry requirements even where they doubt it will make that much competitive difference and fear the potential impact on widening participation and subject breadth.

4.4. Competition for lower cost provision: the other margin

While approximately 85,000 AAB places were removed from core allocations in 2012-13 (and up to 120,000 ABBs were anticipated to be removed from 2013-14³) under the 'high grades' part of the reform, a further 20,000 places were removed for open competition among those institutions willing or able to offer 'quality and value' provision at below £7,500 per year; in 2013-14 an additional 5,000 places were provided for this purpose. This was designed to encourage HE institutions to lower average tuition fees (with the effect that 23 post-1992s institutions did reduce average fees in 2012-13 in order to bid for places) but also encourage FE colleges into the market. This necessarily changed the relationship between post-1992s and the FEHE sector where there has been a long history of collaboration, usually through franchise agreements whereby FE colleges deliver all or part of a programme on behalf of the HEI.

This research provides direct evidence of a general shift from collaboration to competition between HEIs and colleges as a result of the core-margin policy. These shifts were manifested in two particular ways. First, in fee-setting arrangements, where evidence from both post-1992s and further education colleges indicated that HEIs were able to set prices to their advantage in ways that colleges could not, as exemplified in this comment from one post-1992:

“We agreed that with our partner colleges we would allow them to set their fees at £7,000 in the first year ... we'd done the sums to know that that would allow us to have an average fee that would allow us to bid for the additional student numbers last year and we were one of the biggest recipients, we got about an extra 600 student numbers at the beginning of the last academic year, which we were able to fill.” (Post3)

This comment makes the point clearly that the HE institution owning student numbers had scope to 'manipulate' fee setting with their college partners to their own advantage in order to increase differentiation. The perception that such planning advantages had put HEIs at an advantage vis-à-vis their partner colleges was evident in a second consequence of the shift from collaboration to competition, and this was the emergence of a degree of resentment and a hardening of attitudes in HEI-college relations. FEHE3 explained this shift in the following terms:

“[Under franchise arrangements], it was all right battling with universities, you knew what you were up against. You'd sit down in a room, you'd have a chat, you'd have an argument and you'd end up with some kind of an agreement. Now you've got this SNC thing and all of the message that came out of the number control thing which was 'Universities are going to be giving numbers to colleges which they are never ever going to get back' this wasn't just 'Out of the goodness of our hearts we'll allow you to have these numbers this year because we know that if we need them back we can get them back', this is HEFCE saying 'You haven't got these numbers anymore they are going permanently to the colleges' and I think that hardened attitudes ... I think it just undermined an awful lot of that negotiation capacity that you once had.” (FEHE3)

This makes it evident that, although competition at the 'quality and value' margin is for much smaller numbers of students than in the 'high grades' margin, it is equally intense. For those further education colleges who

³ The figure of 120,000 places was widely reported e.g. The Guardian and The Press Association on 27th April 2012 when the extension to ABB was announced for 2013/14

want to protect their higher education provision the stakes are very high indeed which is why directly-funded places from HEFCE were welcomed. Inevitably, this meant increased local competition between providers where none had previously existed – and consequently some deterioration of previously collaborative relationships.

5. The changing institutional focus

This section looks at the ways in which institutions have changed their institutional focus or mission in response to the changing HE landscape in recent years, and specifically since the introduction of the core-margin policy. Survey responses suggested that almost two-thirds of institutions (61.8%) were planning to further differentiate themselves within the sector, which is interesting given that half of respondents expect very little in terms of additional student numbers from such strategies, and suggests that enhancing institutional differentiation is a strategic goal in itself, regardless of potential financial rewards. The measure and means of differentiation was most commonly in relation to mission group/institutional focus for 81%; with 61.9% citing league table rankings; 57.1% the National Student Survey and 47.6% the Destination of Leavers from Higher Education.

Pre-1992 institutions were more likely to cite Mission Group as the key to differentiation; post-1992s were more likely to cite league table rankings. When asked if number controls and increased fees since 2011 were likely to change institutions' student profile in terms of enrolments, 63% selected age, 48.1% lower socio-economic class and those from low participation neighbourhoods as the personal characteristics of the student body most likely to change as a result of the changes; about a fifth (18.5%) also mentioned ethnicity. Among non-personal characteristics, enrolments on the basis of merit, need (ie lower household disposal income) and shortage subjects (ie STEM and Modern Foreign Languages) were also expected to change by around a fifth of respondents. Analysis by institutional type suggests a higher proportion of pre-1992s anticipate that enrolments on the basis of need would be changed.

As we have seen in the previous section, many post-1992 institutions have responded by attempting to move 'up-market' in one way or another in the face of increasing competition for ABB+ students and this has often encompassed reducing provision for part-time and sub-degree students. Post-1992 respondents had to re-evaluate their relationship to the widening participation agenda that has, in most cases, formed the basis of their institutional mission. It seems clear that the FEHE group, as the least autonomous sector considered here, also had the least ability to plan a coherent future strategy in the face of forces they had little control of, however they do have the advantage of agility and make use of the flexibility that comes from not being dependent on HE numbers for their financial viability. Specialist institutions reported the least turbulence, given their relatively small numbers and their stronger relationship to a mission defined by their narrower remits.

Pre-1992 institutions had, on the face of it, less need to change institutional mission given that the SNC policy invited them to focus on their strengths; however, as seen in the previous section, pre-92 respondents felt that SNC and the wider effects of choice and competition in the sector in fact constrained their ability to maintain their efforts to widen participation and justify broader provision in subjects where applicants were less likely to present ABB+ applicant profiles. This section looks at various competitive pressures that led to a changed focus in turn: employability; quality; and the specific changing focus for FEHE providers.

5.1. Employability

The employability of graduates is increasingly seen as important across the sector. For some interviewees the emphasis on Key Information Sets (KIS) including employability outcomes as reported in the DLHE survey has been the key driver; for others, particularly pre-1992 institutions and specialist institutions, the raising of tuition fees has been the key driver and this is linked with the protection of vulnerable subjects discussed in the previous section. For post-1992 and FEHE institutions the rise of employability per se has had less of a transformational impact, though there are reservations about the importance of DLHE outcomes as a reductive metric in institutional league tables.

The relationship between employability and higher tuition fees was highlighted by two pre-1992 interviewees. As one noted "if you pay £9,000 a year, you need to be able to demonstrate what you're going to get from it, not just from a student experience, but an employability perspective" (Pre1, widening participation). Another

pre-1992 linked employability to "some courses [that] are much more in a recruiting mode than they used to be" and therefore the pragmatism of making sure that "they've got good case studies, good stories, good data to back it up" (Pre2, widening participation). For others, the emphasis on employability had led to an institutional rethink:

"I think there is, the £9K started people thinking much more clearly about value-added, 'what do I get out of higher education?', which I think are good questions to ask, and started emphasising notions of skillsets which we've been trying to address by saying 'Actually if you do a modern foreign language your employability could be quite significantly enhanced', particularly if you do it with another subject. So if you're doing Physics, Biological Sciences, do it with Spanish, do it with Russian, do it with Japanese, which we can offer here, that can enhance your employability as opposed to diminishing it." (Pre3)

"I actually want all the staff to be thinking about employability strategies for their courses, or even the units that they teach. How do you relate to this, because we know that that's what's motivating students and their parents more and more, so even if you're relating it to that sense of employability by saying, for this unit or for this part of the course don't think about employability, I think [it's] just trying to gear discourses and gear people's ways of presenting discourses around employability." (Spec1, planning)

An enhanced focus on employability outcomes is something that *Students at the Heart of the System* was designed to stimulate, and offers opportunities for a wider and more critical conception of higher education and its value:

"Part of it is around employability, part of it is about the ways in which we want to enhance the way that our students think about themselves as global citizens able to take critical perspectives from a range of different perspectives and viewpoints. So we do think about employability as specific modules that people might want to do, but we also think about employability in those terms as well, in the ways in which critical thinking skills are enhanced and developed, the way in which a range of perspectives are able to, people can analyse for themselves and bring ideas together." (Spec2)

However, for others the ways that employability is used in public discourse has led to a reductive interpretation of the value of higher education and that has knock-on effects on the sector's ability to maintain the breadth of provision in the face of a discourse that sees little pecuniary value for some subjects:

"I think there is pressure coming from the financial environment and an increasing perception which is reinforced by what (consumer organisation) Which? is doing for example, that a degree is about your career and about nothing else, which is I think unfortunate. ... I don't think we do as fantastic job in the UK as they do in the US in terms of talking about the degree and seeing higher education as being the sort of life experience that's going to give you lots of different things, not just your career, but I think that drive is national and is putting pressure on ... social science subjects, particularly ... and humanities subjects." (Pre1, planning)

Not only do these interpretations feed into a critique of the wider marketisation of the sector, the specific focus on the DLHE as the metric of employability negatively impacts on the opportunity for other approaches to be adopted by institutions:

"Employability is really important, but I think the attention is paid in the wrong places. Raising aspirations and thinking of possibilities as a first-year student is where the action should be, unfortunately in most UK universities that's a trick that's missed, even though the data emerging on student decision making are indicating that they're not making decisions early enough, aspirations and possibilities are not being seeded with them early enough." (Post2)

This in turn leads to a reductive understanding of what higher education is for and what HE institutions are for, and this is nowhere clearer for some than in relation to employability outcome measures:

"I just think the way [DLHE is] calculated is an example of unintelligent use of data for utilitarian purposes, [that says to young people] 'this university, go there, you'll get a job'. It's not as simple as that. I just think the DLHE data ... is crass to be honest with you." (Post2)

5.2. Quality

Another aspect of KIS designed to change institutions' focus is the quality measures presented via the NSS. For post-1992 institutions, in particular this has led to a degree of refocusing on retention and enhancing the student experience.

“The script I use with my team is, if you can't show me immediately what you do that makes a difference to student experience, reputation, retention, the joining up of learning teaching assessment, if you can't show me, then stop it, because you're ... almost surplus to requirements. So really [we face an] alignment, all roads lead into recruitment, retention, reputation.” (Post2)

As ever, the position in league tables was highlighted by respondents as the arbiter of success and failure, with a sharper focus on a perceived trade-off between the traditional view paraphrased as "quality, quality, quality, don't worry about the numbers" versus the post-reform mantra of "quality, plus worry about the numbers". (Post1)

As with the employability focus on the DLHE, there are those that regret the reductive impact of the NSS on efforts to actually enhance the quality of the student experience:

“In quality systems we respond to things in a terribly superficial thin, description way, in other words we look at the NSS, we wouldn't necessarily systematically triangulate that and I think we're doing a reasonable job here ... surveys are great, it's not the survey results that matter it's the conversations that start as a consequence and I think that's where the action is really.” (Post2)

The linking of research to the enhanced student experience as an aspect of enhancing quality was overtly made by two post-1992 interviewees as an instance of a changing focus. One approach was to rebalance resources from teaching and learning to research, as part of a rationalisation of provision that pre-dated the core-margin policy; the other was the, perhaps short-term, emphasis on research in the run-up to the 2014 Research Excellence Framework (REF), seen as important in league table positioning terms.

While the research found some examples of a changed institutional focus in the new landscape, inevitably for some the emphasis was as much on protecting and maintaining the existing institutional mission, even in the face of external market and internal managerial pressures:

“I think also what we might see, which is a worry for me, not here but there's a worry about the sector is, second tier [institutions] becoming populated by non-academic infiltrators who are not necessarily subscribing to the culture of what the university is ... and I've seen instances in the UK where you start to see those roles emerging at the sort of DVC level. Yet to be seen what the absolute impact is, but culturally there's a restructure, it doesn't matter if it's the right structure, as long as the restructuring saves some money and gets rid of the old wood, even if they're pretty good, they'll bring in a culture that they can manage easier.” (Post2)

“We want to protect ourselves and the institution; there's a very strong feeling among staff, staff here come both because they're committed to [the institution] and what we do as well. So almost everyone here really buys into [the institution], really buys into the mission and so whatever we do we constantly say 'This is mission-led, mission-driven, is this still within our values, our ethos?' and if we can answer yes to that then it's something that we'll carry on discussing. If we say no then it kind of just disappears.” (Spec2)

5.3. Changing focus for FEHE institutions

FEHE institutions reported the most variance in their reaction to the changing circumstances, in keeping with their essentially unbalanced and usually reactive relationship with HEIs, though of course they were also subject to purely market pressures. Some reported the significant loss of part-time numbers due to the rise in tuition fees. In some cases this was related to whether their provision was traditionally paid for by employers (more resistant to higher fees) or individuals. Since the introduction of core-margin, some FEHE institutions had gained places through their partnership arrangements with HEIs, others had gained them by bidding directly for HEFCE numbers. Many reported that their relationship with partner HEIs had been changing and

reconfiguring year on year as collaboration was increasingly replaced by competition or, in some cases, stronger partnerships.

The main area for a changed focus was the decision about whether to grow their HE provision, and this could take two main forms: expanding the breadth of provision; and providing additional routes to and support for progression for their existing students.

For those FE colleges looking to expand provision, the focus was on an organic form of growth by building on and adding to current specialisms, rather than any development of new courses:

“We have broadened out from the traditional land-based, horticulture and agriculture-type subjects into more specialised ... subjects ... We do look for new avenues ... but [they are] not really linked to fees and the new regime in any way but more linked to the specialisms that we do.” (FEHE1)

“[Expansion] is an important part of our strategy but [management] don't want to massively expand they just see it as a natural progression route ... for our own home-grown students for whom going away to university might suddenly become a barrier.” (FEHE2)

In a second strand, FEHE providers were developing additional routes to and support for progression for their existing students, thereby creating smooth routes for learners to progress from school, to further education and then higher education, as in these two examples:

“When I took over HE, I've only been doing it for two years, I discovered that there was absolutely no Access programmes in college that progressed to our HE. Yes, we were working very hard in our Access provision, we had over 300 Access students all going somewhere else (FEHE4).

“Because of the specialist nature of the provision, we have progression right through from Level 2 up to Level 5 and in most cases Level 6 and some cases Level 7. So it's a curriculum model that flows right the way through so they can come and study Animal Studies or ... Sciences right from doing GCSEs all the way through, if they want to.” (FEHE1)

The research also indicates a range of sector-level factors influencing FEHE institutions' decision regarding their HE provision. These factors are often linked to the prestige of HE level work, from the point of view of institutional managers. One institution reported that:

“Over the last four years our Principal's got much more engaged with the HE offer, whether that's because the environment has changed or whether it's because I'm louder than my predecessor. We all want to grow and we all know what we could provide the students if we were allowed to grow.” (FEHE4)

Another influential factor has been the introduction of the Integrated Quality and Enhancement Review (IQER) which aligns FE in HE quality assurance procedures with those in HEIs, and it was reported that this had:

“Brought home to a lot of principals the fact that actually there's a fairly big chunk of business going on under their noses that they'd never noticed before. And suddenly there were people from all sorts of universities and other places trampling all over the campus nosing around in the inner workings of their HE and they decided to take an interest, and that's had a positive impact.” (FEHE3)

A third factor considered by respondents to be affecting FE colleges and some post-1992s willing to offer HE at below £7,500 per year was perceived competition for the 20,000-place margin from alternative or 'new entrant providers' in the private sector. (In fact private providers were excluded from HEFCE allocations. Applications for course designation for student support purposes could be made by alternative providers to the Secretary of State.) One interviewee believed that this was beginning to impact on their provision:

“My boss, who's the VP, got very upset about new entrants and I was just thinking 'Oh it doesn't matter' but I've had two phone calls from [new alternative providers] who've got 50 HEFCE numbers, so that's two, that's 100 ... they come to us ... asking for advice about setting fees and charging and marketing and etc

... and one of them's starting it in Public Services that I was sat waiting to do. So it is outrageous that they're giving them those numbers.” (FEHE5)

Given the Treasury's Autumn statement decision to fund an additional 30,000 places in 2014-15 and abolish SNC altogether from 2015-16 (HM Treasury 2013), alongside Government encouragement for new alternative providers to enter the market, competitive pressures for students at the HEI-college-alternative providers nexus is set to intensify considerably. In this new context, it is likely that institutional articulations regarding the quality of their undergraduate teaching and learning, alongside student support mechanisms, will be of prime importance.

6. The changing marketing practices of higher education providers

Two areas of changing marketing practices are explored in this section: the marketing of the institution, ie branding; and outreach and recruitment efforts by institutions. The importance of institutional brands for universities has long been recognised. Fairclough (1993) borrowing Foucault's concept, wrote about discourse as a *mode of action* variably used by different institutional types as market positioning devices at the time of the creation of post-1992 universities. Marketing theory suggests that market efficiency presupposes full information being available to consumers (Gibbs and Knapp 2002). However, in higher education where full information is not clearly available (for example in relation to satisfaction outcomes) consumers will look for alternative indicators, such as prestige, which in effect act as a substitute for information about quality in the minds of consumers and media commentators, such as can be found in published institutional league tables and rankings (Brown and Scott 2009). Prestige is, by its very nature, restricted to a few institutions. For others to develop or maintain a positive or desirable image it is important for institutions to be firmly located in a 'choice set' which in the English context might take the form of selective research-orientated institutions or, alternatively, as accessible WP institutions that actively promote inclusive social justice (Gibbs and Knapp 2002; McCaig 2011). Locating the institution within an identified and valued 'choice set' theoretically makes it easier for consumers to make application and acceptance decisions.

Outreach can be seen as a subset of marketing aimed specifically at young potential applicants, though at least one of the post-1992 institutions emphasised the importance of outreach activity targeted at key influences, such as school head teachers, college principals and parents. All institutional types when surveyed reported reviewing their marketing and recruitment practices to target and attract particular groups of students, and this included an increasing scrutiny of perceived competitors, in particular through closer attention to the significance of NSS scores for some post-1992 institutions. There were some significant examples of pre-1992 institutions altering their marketing approach in a search for potential 'high grades' AAB/ABB applicants, for example by widening the geographical scope of their outreach activities and targeting areas with very high participation rates such as London and the south east of England. All expected their expenditure on marketing to grow in future.

6.1. Branding the institution

Branding is something that institutions at all levels have taken into consideration in the changing HE landscape. Some of this is focused on employers and sector competitors and pitched at the institutional level, while for others the branding is focused on specific provision or a mixture of provision (which may conversely mean de-emphasising some other aspects of the brand). An important aspect of branding is that it is designed to help differentiate institutions. When surveyed, almost two-thirds of respondents indicated their institution was planning to further differentiate as a consequence of the changes to SNC and other aspects of the marketisation of the sector, even though around half of them expected very little change in terms of additional student numbers. This suggests that enhancing institutional differentiation is a strategic goal in itself, particularly for post-1992s, regardless of potential financial rewards. Indeed, factors behind course rationalisation were largely to do with marketisation and market positioning and arose primarily as the result of (longer-term) choice and competition rather than as a response to the core-margin policy after 2012-13. Two approaches to the development of a positive brand message are worth highlighting here. The first example is a successful Russell Group university that worked at the level of advertising to reinforce the existing prestigious corporate image:

“Our strategy is that we have to market the brand of [the University] and having that brand is what will get students to apply to come to ... and take an interest in [the University]. I don't actually think that targeting them necessarily beneath that level of brand is that significant.” (Pre3)

The second approach, from a post-1992 institution that has aspirations to enhance its league table position, is also focussed on the corporate whole but the method is mainly networking. The interesting twist is that two

distinct groups are 'networked': national elites (to raise the profile of the institution) and local key influencers (who may go on to recommend the institution to young people):

“We do quite a lot of entertaining of strategically important people like headmasters, college heads, so we've done a lot of dinners at the House of Lords and dinners in various venues, all part and parcel of spreading the word and getting the colleges and, we know quite a lot of the colleges anyway but the schools, heads of local schools and getting them more involved in the university. We've had a number of heads who've been involved in the graduation ceremonies.” (Post3)

Some institutions are less confident of having a successful brand to promote in the changing HE landscape. One post-1992 respondent was not sure whether the institution had established a new brand despite having an aspirational league-table position target and having raised its entry requirements. This underlines the problems faced by institutions that want to move from one 'choice set' to another (for example as an inclusive WP institution to a 'top-50' institution):

“So I suspect that we are in a situation where we need to, probably in terms of our marketing, understand what is the real brand we're trying to sell and who we are trying to market to and how diverse that market may be in terms of the constituents, and I don't think we've got to that stage yet.” (Post1)

For pre-1992s re-branding can often be more subtle, yet paradoxically, given the competitive driver of growing the number of ABBs under core-margin, more important and immediate than for a mid-ranking post-1992 institution hoping to move a few places higher in the rankings (such as Post2). Competitive pressure on the already-successful means it can be less important for a Russell Group university to be seen as a nurturing institution in "a friendly city" when the perception (encouraged by *Students at the Heart of the System*) is that consumers are rational calculators of the bottom line seeking "a serious university" (Pre1, widening participation).

Branding focused on aspects of provision (rather than the prestige of the corporate whole) often involves a closer examination of what an institution does less well; here the impact of core and margin and the wider marketisation agenda can be manifested in portfolio reviews that threaten the breadth of provision:

“I think we're already seeing institutions become a little bit more hawkish about the portfolios they offer and perhaps a little less willing to ignore struggling subject areas ... I think what we've found is that that type of challenge in terms of a subject areas that are struggling to find a market – it's been underlined by SNC and the current developments, but [challenges] ... haven't just appeared out the blue ... [SNC has] just reinforced it and to some extent perhaps brought it to a head in certain institutions.” (Pre1, planning)

Changing the brand of an institution may not have only threatened the range of courses on offer, it can effectively reduce understanding of what a university is and make aspects of higher education more vulnerable: for one interviewee branding can appear "like an algorithm of components ostensibly derived ... from the indicators within league table algorithms" (Post2). This is connected to the raised importance of employability outcomes in institutions' understanding of what applicants want from a university under the more competitive conditions: "in the past [the brand] was more about, come here, we're a little bit different, quirky" whereas latterly it had become solely about the immediate satisfaction of applicants' desire to get a job (Post2).

For some FEHE providers, having direct numbers from HEFCE provided them with a new positive message which added focus to their marketing practices:

“This is the first year that we've had our own numbers and ... we've felt as though we've had more control over recruitment and marketing ... whereas our hands were very much tied in the past, certainly by [local post-1992 partners], so there is that greater control and it is having an impact. Most of our recruitment, if not all, is very local, so we've been able to reach out into the locality and do some direct marketing to do that.” (FEHE2)

“The HE provision falls under something which we've marketed as the [College] Business School. It used to just be called the Business Development Unit ... and HE fell under that banner. I didn't like the idea of a Business Development Unit because it looks as though it's just for generating money so we have done quite a big push to market ourselves as [College] Business School, with new signage and that kind of thing.” (FEHE2)

6.2. Outreach and recruitment

The other aspect of marketisation that exercised interviewees was that aimed specifically at recruitment of students in the form of outreach activities and incentives. Strategies vary according to context and the specificity of need. In some instances the requirement is for institutions to reach out into the community to both attract potential applicants to the specific institution and to raise awareness, and thus potentially raise aspirations:

“Word of mouth I think is important, I think head teachers are important, schools are important, building networks with schools and being much more visible. I think [this institution] has been described as being a bit more in-your-face, wherever you go around here you see it ... We've got this double-decker bus that we go to lots of our feeder schools with.” (Post3)

A second strategy is inviting students and parents into the institution; again this can help raise aspirations among those not currently considering HE: “Open Days are one of our most successful ways of recruiting ... you need to get to the parents I think, it's about raising their aspirations for their children and getting them thinking which seems to me to be the most important thing” (Post3). Open days are also used to illustrate employability outcomes, by showcasing career options and opportunities. For some this has become even more important since the rise in tuition fees:

“There is more emphasis now in terms of the way we market our courses, our specialist courses, our employability ... People now come to open days with their parents and all the questions are about what jobs they're going to get and that's what they're interested in seeing and we've got good stories to tell there.” (Spec I, planning).

Pre-1992 institutions traditionally have engaged in outreach targeted at bright potential WP applicants, however the imperative to recruit more ABB+ students required them to seek out bright young people (ie those with the potential to attain ABB+) from a much wider geographical area than previously; in some cases this has led to a concentration of outreach work in the London and south east regions given the higher preponderance of young people from those regions to progress to higher education. For one pre-1992 this has led to the development of virtual open days and virtual fairs with input from academic staff (Pre I, widening participation).

Another key aspect to such outreach - especially among potential ABBs from poorer backgrounds and whose families have no prior experience of the system - is educational, an attempt to counter the perceived deficit in the information, advice and guidance that young people from that background have been subject to:

“I think that for a number of reasons the kind of mixed messages about fees, the issues around student number controls, a lack of understanding still on the part of WP students particularly about insurance. We still get students putting universities down [on UCAS application forms] as their insurance option with grades higher than their first choice universities, so there's all sorts of issues around that.” (Pre I, widening participation)

Marketing of this kind, pressurised by core and margin and within an overall numbers cap, was essentially a zero-sum game at sector level: each winner was necessarily matched by a loser. For some interviewees this not only sullied the reputations of individual institutions but risked serious reputational damage to a sector that contains more good universities and provision than some believed:

“It's regrettable, it's already there to some extent, but it's just exacerbating the tiering of the system. [The implication of *Students at the Heart of the System*] is that they just want poor people to go to cheap poor quality courses ... but they do seem to have a very blinkered vision of what's a good university, so [local

post-1992 university] has very well regarded courses ... That's what worries me the most is just concentrating on just a few *uber* top careers that only Russell Group or only Oxbridge or only the big five will get you into it and everyone else doesn't seem to matter, they don't seem to matter." (Pre2, widening participation)

"Shrinking courses at something like [local post-1992] it's not good for the sector, it must result in either fewer students going on into higher education and it is statistically likely to be WVP students because they've got the lower entry requirements, or it's you know universities putting on cheaper courses, so cheaper lower quality." (Pre2, widening participation)

As noted in Section 4 for post-1992s the threat of direct competition with alternative and private providers for funded places was something anticipated and feared by some, but which had not yet materialised. However the aggressive use of marketing techniques was viewed askance across the sector as a zero-sum game with potential harm to post-1992 institutions' high quality provision due to the negative overall image attached to around three-quarters of the entire sector. Even those most positive about the use of marketing realise the importance of it being based on real factors such as enhanced employability outcomes, however it is also clear that for pre-1992s with a 'good story to tell' changing the number of people it reaches out to is probably as important as changing the story it has to tell.

7. The changing student profile

As noted previously, *Students at the Heart of the System* aimed to use the mechanism of removing ABB+ applicants from the core allocation to make it easier for the highest achieving applicants to gain entry to their first choice of courses (assuming additional places were made available for those courses to expand). In addition, 20,000 places were removed from the core and could be bid for by providers whose fees were at £7,500 or under, a group comprising largely colleges with HE provision and some post-1992 providers. All institutions that contributed to this research reported that they had experienced greater volatility in admissions and enrolments as a result of core and margin and that this had resulted in differential impacts on disciplines, courses and mode of study, and all institutions reported drops in student enrolment or the maintenance of a static state. Notable here is the finding that part-time numbers have been badly affected in all institutions but particularly at some FEHE institutions, a decline which is borne out by other research which indicates the numbers of students recruited to undergraduate part-time courses in England has fallen by 40% over the last three years (UUK 2013). The research disclosed a mixed picture of how the operation of core and margin is influencing changes to the student profile in a context of increased student choice and market competition.

7.1. Institutional responses to reduced and/or unpredictable enrolments

Survey findings indicated that the largest group of respondents (38.5%) anticipated a slight decrease in undergraduate numbers in the coming years, with almost half expecting no change (23.1%) or a slight increase (25.6%) in student numbers. Qualitative data from interviews confirmed these trends and expectations. Two of the post-1992 institutions had seen numbers drop considerably the previous year (the year the fees were increased to maximum £9,000) while the third had maintained full-time numbers and was well within its SNC flexibility range. Of the two experiencing reduced enrolments, Post3 reported the most significant decline at about 25% or 30% in 2011-12 followed by another 10% decline the subsequent year; while the aim for Post1 was “just to get numbers and not worry about exceeding our new entry control number”, a strategy developed in the knowledge that they were not going to be able to grow numbers of AAB-ABB students. As a consequence of the loss of numbers, Post3 had focused on “becoming ever more sophisticated about the data that we collect and use for our management information” in order to “monitor virtually on a daily basis really how recruitment is developing” (Post3).

The three pre-1992 universities were facing a similar set of pressures on admissions. Like the post-1992s they all had had reduced enrolments (considerably reduced in two cases) in 2011-12 followed by modest rises the following year. Each pre-1992 representative interviewed remarked on the unpredictability of entry patterns, for example:

“We're into a pretty volatile period where it's, we've had two years, we've had one year of an extreme case, then a kind of a switch back and now I think this year, it's too early to say, but we were kind of saying last year that it feels like we were getting back to normal, that was our gut feeling about it.” (Pre3)

Another reported they were waiting until the fees and number controls situation ‘settled down’ before making any decisions about course closures. These comments perhaps indicate a higher sense of confidence in enrolment numbers returning to normal than other parts of the sector, where competitive pressures on recruitment looked likely to intensify, that is at the post-1992-further-education-college interface, for example. This would bear out findings from the survey which indicate that pre-1992 institutions reported greater confidence in at least maintaining their current student numbers than post-1992 institutions or FEHE respondents.

All pre-1992s interviewed reported that they were actively pursuing the strategy of competition for students with the best grades who fall within the ‘high grades’ margin. Indeed, overall, the research indicated that greater competition for ABB+ students has become the major competitive nexus between pre-1992s. In relation to this, Pre2 expressed their commitment to “growing the quality [rather] than the quantity” although

their ability to do this differed in relation to different subjects. In line with other pre-1992s who found SNC constrained their ability to recruit particular groups of students, Pre2 (planner) made the point that their university had ambitions to recruit all their students outside SNC and that they aspired “to get rid of it all together”. To achieve this goal, they were focusing efforts on national UK (particularly the wealthy south-east of England) and international markets to increase the numbers of high grade and, therefore SNC-exempt, students as a proportion within their overall student profile.

The third group of institutions, the FE colleges, had seen sharp drops in numbers largely due to their partner university holding on to their SNC allocations, although the pattern was mixed. One college had been hit very hard by the reduction in part-time students:

“We didn't foresee the sorts of changes that were going to happen, we thought that there would be a reduction in numbers pretty much across the board. What we didn't foresee was the collapse in part-time recruitment, I mean collapse, collapse, devastating collapse.” (FEHE3).

Another college talked about how:

“SNC ... shrank us, dramatically shrunk us ... we have decided to over recruit this September and live with the fines. We were fined two years ago and we managed so we've brought it all back in line, but sod it we're going to over recruit again. I'm not trading. We've gone for two more groups on that basis [of getting more DDDs].” (FEHE4)

In contrast, and as an indicator of greater volatility and the FEHE sector's comparatively reduced abilities to predict and therefore plan for change, another college (FEHE5) reported on the “strange patterns” that had developed with their full-time entrants, describing how they had “hit target, but we doubled the number of DDDs from anticipated”, an unexpected development which did not fit with predicted numbers based on their previous two year's admissions patterns, and which led them to reconfigure their growth plans for 2014-15. One provider that had also maintained recruitment despite fee increases, believed it was largely due to their student profile which “tends to be white middle class and the same type of students who attend sixth form” in the immediate area. This latter FEHE case indicates the advantages some colleges possess in having and holding a student population through “direct marketing to our own [students] to inform them about our HE provision” (FEHE4).

Interview data revealed the anxieties produced by the relentless focus on admission numbers that had led post-1992s to adopt a range of strategies including: raising UCAS entry point tariffs (Post2): maintaining UCAS tariffs at current levels (Post3): and accepting all the students they could to hit SNC targets without holding an absolute line on entry points (Post1). For Post2, the raising of UCAS tariff points was not just an expression of the need to manage student number control targets, it was also about branding and marketing and was considered to be key to the retention of those “better students who are less likely to fall out”. It is an instance which illuminates the complex relation between SNC, retention and institutional competition.

The raising of UCAS points also impinged, albeit indirectly, on the relationship between recruitment, changes in student profile and provision offer. The survey confirmed considerable consistency among respondents when asked about plans to change UCAS tariffs, with close to half of respondents reporting an anticipated raising of thresholds, ranging from a high of 47.8% for subjects allied to medicine/health-related down to 39.1% for humanities and 39.3% for arts. The proportion of those indicating no change to UCAS points mirrored these proportionately; with arts the highest at 57.1% and social sciences the lowest at 50%. Respondents from Pre-1992 institutions were more likely to report raised entry threshold grades than other institution types and across all subjects, particularly for subjects allied to medicine/health-related and STEM subjects. Only one pre-1992 institution anticipated that the changes would result in lowered entry thresholds across all subject areas.

These findings point to two conclusions: first, that respondents recognised that demand for subjects allied to medicine/health-related and STEM subjects were more likely to remain stronger than the other subject areas; and second, that pre-1992 institutions were responding to SNC and the new fee regime by attracting more ABB+ students. This latter finding of the survey is corroborated by the qualitative interview data, although it is

important to note that none of these variables acts in isolation – competition for particular groups of students, UCAS tariff points, subject provision, and student profile are intertwined within an emerging competitive nexus produced by the market effects introduced by SNC, higher fees and increased student choice. What the research appears to indicate is that all institutional types, in a context of stagnant at best and, at worst, considerable reductions in overall student numbers, were changing their student profile for purely marketing reasons, ie in an effort to increase their share of more qualified students and reduce their exposure to students with lower entry qualifications that might be more likely to drop-out.

7.2 Changing composition of the student cohort

The pressures on admissions described here, and how these pressures played out for different types of institutions, provide the context for understanding what is happening to the student profile and, in particular, how and where it is changing and why, and where it isn't, and why. Over half the respondents to the survey highlighted changes to the student profile as one of their main concerns in the new higher education landscape. While most respondents expected to maintain their current student profile, concerns were expressed about the anticipated decline in part-time, mature and poorer students, concerns which appear justified at least for the former two groups given recent studies which confirm the declining numbers of part-time and mature applicants (UUK 2012; 2013). When asked if number controls and increased fees since 2011 were likely to change their institution's student profile in terms of enrolments on the basis of selected criteria, 63% selected age, 48% lower socio-economic class and those from low participation neighbourhoods as the characteristics of the student body most likely to change; about a fifth also mentioned ethnicity. Among non-personal characteristics, enrolments on the basis of merit, need (ie lower household disposal income) and shortage subjects (ie STEM and Modern Foreign Languages) were also expected to change by a fifth of respondents.

7.2.1. Widening participation and fair access

Changes to institutions' commitments to widening participation and fair access were key given the Government's stated desire that universities ought to "promote fairer access without undermining academic excellence or institutional autonomy" (BIS 2011:54). Survey analysis indicated several risks to widening participation due to the high proportion of respondents (62%) indicating that their institution was planning to further differentiate itself within the market and the likely impact this would have on attracting students from lower socio-economic classes and those from low participation neighbourhoods. Interview data added further weight to these survey findings, although different institutional types were responding to these risks to widening participation differently.

Of the pre-1992 institutions, two spoke directly about the impact the increased competition for high grades students was already having on widening participation. Pre1 (widening participation) thought the institutional focus on high grades students, allied to "mixed messages" about fees, and widening participation students' "lack of understanding" of the application and admissions process, was a real cause for concern. In addition, these factors had been compounded by this university's inability, given their institution's interpretation of how number control constraints worked⁴, to make contextual offers and take a chance on a WP student who had not quite achieved the right grades. This lack of institutional flexibility ran counter to institutional data on and track record of WP students who were not "of lower ability by any stretch and [who] have achieved as well as other non-WP students". Nevertheless, as a result of these competing institutional pressures "the first year of SNC probably squeezed some of those students out", although this respondent thought that the "squeeze" on WP students would be less severe in subsequent years, because admissions were dealt with centrally rather than departmentally in order to "take account of WP groups, non-standard qualifications and mature students" (Pre1, widening participation). Of course, while the situation appeared grimmer for some WP students in the current SNC regime, the abolition of controls from 2015-16 should alleviate some of the current pressures. This respondent emphasised that, despite the "squeeze" on WP students via current

⁴ As noted above, HEFCE did seek to provide fair access protection.

admissions practices, the philosophical commitment of this Russell Group university to widening participation remained strong.

In contrast to Pre1, which had seen an across-the-board reduction of WP students, in Pre2, it was the admissions patterns in particular subjects that had the most direct impact on WP students, as noted in Section 3 (above). Here, the high demand for science subjects meant those places were being filled by non-high-grades students, whereas lower demand for arts and humanities subjects meant reduced competition for a smaller number of places in less prestigious subjects, and a consequent greater density of WP students.

Specialist institutions were generally unaffected by the drive to compete for high grades students because they relied on assessment via audition and interview as selection criteria, rather than A-level grades. As a consequence, their student profile remained much as it was prior to the introduction of higher fees and tighter SNC measures. The lack of emphasis placed on A-level grades meant the student profile remained diverse and there were no plans to change this. This institution, therefore, continued to be able to balance being highly selective on the basis of skills and aptitudes with the ability to recruit a highly diverse student constituency to which inclusivity and widening participation was key.

In the survey and interviews, post-1992 universities expressed strong continuing commitment to widening participation. For example, one (anonymised) post-1992's response to the survey highlighted that, despite the axing of Aimhigher, they:

“Have a high recruitment from lower socio economic groups and local ethnic groups which are debt averse - we are working hard to seek to maintain recruitment from these groupings, in particular through more extensive partnership working with local schools and colleges.” (post-1992)

In interview, Post1 talked of the “pressure point” that was felt when trying to reconcile institutional goals to move upmarket by attracting high grades students with the fact that “The governors are very keen on the widening participation, widening access, local community role agenda.” The loss of some WP numbers would not, this respondent thought, “make a very big significant impact on that agenda per se, well, in terms of those benchmarks” (Post1) but nevertheless the reorientation of their student profile was keenly felt as a shift away from their fundamental mission as a widening participation institution. These considerations were echoed by another post-1992 whose institution still had a “genuine belief” in widening participation due to the fact that:

“It's not just a way of securing your SNC, in fact the genuine belief is backed up by the high retention rate of a lot of those students and also the high success rate, so it does feel that it's worthwhile, but also there is a certain business savvy for that as well to fish broadly to protect your SNC.” (Post2)

However, a note of caution was struck by this respondent who linked the reduction in the commitment to widening participation in many universities with the need for universities to protect their SNC from “the risks that go with low retention of WP students which then adversely affects your income streams” (Post2). This risk aversion was, in this respondent's view, lamentable and seemed to herald a sector that was pulling the plug on funding for WP students.

The fourth type of institution – the FEHE institutions – had a good track record of widening participation but their scope to expand their intake of WP students was limited by the reduction of franchise numbers from partner universities offset by their own direct HEFCE numbers.

The research provides evidence to suggest the withering away of WP particularly in pre- and post-1992 institutions, although at a quicker rate in the former than the latter. The reduction of opportunities for young people from LPNs to study at selective universities but also at post-92s is a worrying finding and especially so in the context of OFFA (2010) data which shows that the relative chance of people from low-income backgrounds studying at the most selective third of universities has worsened since 2007-08, even though there has been an overall slight decrease in the number of the most advantaged young people getting into a selective institution (BIS, 2011b).

It is hoped that the removal of caps on numbers from 2015-16 will reverse the current trends which point to reduced opportunities for WP students. In line with this, it will be important for higher education providers to review their financial support packages as well as their institutional support mechanisms to enable a potentially more diverse student population to access higher education opportunities more equitably.

7.2.2 BAME participation and changing student profile

The survey and interviews confirmed that for some in the post-1992 group, locality was a key factor in some institutions' ability to maintain a high proportion of BAME students in their overall student profile. Post1, located in a dense urban area of high ethnic mix, noted that they were "nearly 50% BAME and 40% mature" and that "our BAME grouping will not change dramatically". BAME proportions were also being maintained at one specialist institution which had a 16% BAME student population overall, and undergraduate courses which ranged from 25% BAME student population to 11% BAME students" (Spec1), which was above national averages for this particular group and dependent on location factors which were likely to remain stable. Another specialist institution had improved their ethnic diversity and mix after offering HE provision on a second newly-built campus in a deprived city area with a high ethnic mix (Spec2). Overall, both post-1992s and specialist institutions indicated their proportion of BAME students had been unaffected by changes to SNC.

In contrast, the correlation between locality and BAME student cohort was brought into sharp focus by Post2, which was situated in a semi-rural area surrounded by large conurbations with high ethnic mix and containing both selective and WP universities and whose BAME numbers had historically always been low and were expected to remain low, even though this university expressed "a responsibility to [improve BAME profile] because it's the right thing to do and also we think it's good for the rest of the students to have a good cultural and racial mix" (Post2).

The picture was different for the pre-1992 universities for whom BAME students remained a small proportion of their student population. One respondent commented that:

"The disparities in offer making and acceptances and then registration [had encouraged them to] do some more digging into this, from an ethnicity perspective, we never really know what to judge ourselves against because we don't have a benchmark so it's not as though there's a formal, you know, whether we met or not." (Pre1, widening participation)

The lack of a benchmark and lack of internal data had led to what this respondent saw as the disparities in the proportional distribution of BAME students in relation to particular subject areas:

"Medicine and Dentistry ... get a lot of applications from students from ethnic minority backgrounds ... those particular subject areas [are] massively oversubscribed, so obviously that means we're turning a lot of BAME students down just because we don't have the places." (Pre1, widening participation)

A number of pre-1992s reported they lacked internal data on their BAME student cohort which meant they found it difficult to compare performance of BAME students in comparison with other student populations or across subject admissions. However, according to two pre-1992s, BAME performance and course distribution were unrelated to SNC per se and, rather, were a "problem that's more a broad education or preparation problem that we need to build into our access agreement and our approach to WP" (Pre1, planning). Steps to collect data to address the disparity in BAME students in the overall profile and course distribution were hampered in pre-1992 institutions due to the "small number of applicants" (Pre1, planning).

These findings support those of previous studies on the BAME attainment gap (Dhanda 2010; Singh 2011) and suggest that increasing knowledge of BAME patterns of application, admissions and course distribution will be crucial for all institutions in the coming years, particularly in light of the shifts in institutional strategies with respect to widening participation students. It was surprising to discover that the sophisticated planning mechanisms pre-1992s possessed for monitoring SNC at whole-system level were not currently gathering sufficiently detailed data to map the BAME cohort as part of the student profile.

7.2.3 Gender participation and changing student profile

The research showed that traditional patterns of gender distribution by subject stubbornly persisted across the sector, thus confirming long-standing international (Vincent-Lancrin 2008) and UK (UUK 2012) trends which indicate women continue to dominate in education, teaching, health and social sector subjects while men are more likely to be found in science and engineering subjects.

Interviews disclosed that in post-1992 institutions where the female student population is larger than the male cohort, STEM subjects still had a majority male student population, and survey findings indicated that those areas with strong concentrations of female students were continuing to recruit strongly. These patterns were repeated across institutions. The continuation of the gendered bias of subject choice and gender distribution by course was mentioned by some of our respondents as a deterrent to applying for university for the particular group of young white males from low socioeconomic groups:

“One of our biggest concerns is recruitment and retention of young white males from low socio-economic groups [who are] just not pitching it like they used to, could be debt aversion, could also be that the image of the university in the press is so maligned, you know there’s no point going because it’s not going to make a difference.” (Post2).

7.2.3 Part-time and mature participation and the changing student profile

The vast majority of all respondents reported a decline in the numbers of part-time students as a proportion of their overall student profile. All pre- and post-1992s had seen a decline in part-time students but the picture varied as to levels of part-time decline. As noted previously, part-time numbers were not included in SNC and the decline in part-time students is indicative of the broader and longer term effects of increasing choice and competition.

When asked about part-time students Pre1 noted “we’re going to really struggle to accommodate any part-time learners”, while another said their only growth in part-time students would be at postgraduate level (Pre3). In similar vein, one post-1992 HEI said its part-time numbers had fallen but since stabilised (Post1), a pattern which was replicated in other HEIs. A post-1992 responding to the survey reported “massive declines” (Post2). One survey respondent commented that they had seen “a dramatic fall in applications and enrolments to part-time study” and as a consequence reported that they could no longer sustain part-time provision in some areas. The fall in part-time enrolments had led this institution to focus resolutely on full-time students in a context of increased concerns about whether “students with low tariff points on entry have the capacity to complete a degree”.

The reasons behind this fall of part-time students seem overwhelmingly to do with the increase in fees, and a lack of awareness of bursary and other support packages. Added to this – and, like increased fees, unrelated in any direct way to SNC, increased student choice or increased marketisation of higher education but, nevertheless, very much part of the complex picture relating to this particular group of students – was the withdrawal of employer funding for continuing professional development, which a number of post-1992s confirmed had had a “big impact” on part-time numbers.

While the FEHE colleges reported varying levels of loss of part-time numbers, all noted that the loss of employer-paid part-time provision had been a crucial factor. As previously noted (section 6.1), the research disclosed that the most dramatic loss had been suffered by a city FEHE provider who talked of the “collapse, collapse, devastating collapse” (FEHE3) in part-time recruitment.

Nevertheless, the agility of colleges in responding to these reductions was in marked contrast to the universities. While none of the HEIs had (or were intending to develop) a strategy to address this particular change in their student profile, colleges, in contrast, had already begun to devise new marketing strategies. These ranged from beginning to target AABs and ABBs (FEHE3); increase provision in HNC engineering to build on a growing course and to capture numbers from other local and regional providers who were closing

such courses (FEHE4); and restructure part-time programmes so an HNC could be completed in 18 months with a “rollover to HND for those that want it” (FEHE5).

Most mature students study part-time and the same pattern of reduction in numbers of mature students within the student profile was, therefore, not surprising. The reasons for these reductions were mainly explained by a combination of the increase in fees and the current state of the economy making mature students, particularly those with established careers, less likely to enter higher education, although mode of provision (ie day-time only) was also highlighted as an important factor for this group.

8. Teaching and learning

Students at the Heart of the System emphasises university autonomy in making decisions about their institution, including course portfolio, curriculum offer and mode of delivery (BIS 2011b). Interview data indicated that the recent policy changes, alongside the increased competition within the sector, have created a context in which it has been necessary to carry out institutional portfolio reviews. Most of the respondents in the study had either undergone portfolio review the previous year, or were undertaking a review in the current academic year, or were managing their portfolios with a much keener eye than before with a view to making curriculum changes in response to developing patterns of course recruitment and retention. What was at stake was intimated by one interviewee who, after commenting that the curriculum was “up for grabs” in his institution, noted that the effects of portfolio review may have in terms of improving the institution’s positioning within the sector had to be balanced against the “natural conservatism” not just of lecturers but also of parents and careers advisers (PreI, planning).

This section outlines how SNC and increased choice and competition are impacting on teaching and learning in relation to course closure and course rationalisation, mode of delivery, and use of teaching space. Some implications for staff are identified although institutions were understandably cautious about discussing these. As with other aspects of this research, the evidence suggests that the controls are one factor in the complex picture of changes affecting teaching and learning across the sector.

8.1. Course closure and course rationalisation: undergraduate degree provision

The survey provided some baseline data on course closures and course rationalisation. Anonymised survey responses reported that:

- course rationalisation had already taken place in some HEIs. There had been, for example, a “major reduction in low recruiting courses” and “considerable rationalisation of courses across all subject areas” took place in 2011-12 in anticipation of changes;
- combined honours and joint honours degrees were particularly vulnerable to closure given that many combinations attract small numbers of students, or “appear to be less attractive in the marketplace”, or do not recruit. For example, one HEI with a large combined honours programme confirmed it was ‘slimming down’ its portfolio from 141 courses to less than 50 courses;
- where programmes fail to recruit a minimum number of students (ten full-time students) they will not run or will face institutional review.

Course closure was also specifically linked by survey respondents to the need to achieve a “better student experience” as well as “greater efficiencies”.

Interview data provided additional contextual accounts of reasons for course closures. For post-1992 institutions, the controls were important but were not identified as the only driver behind course rationalisation. More significant was the need to shape provision around “attractive programmes that’ll pull students in” (Post2) and ensure these obtain, as one respondent put it, “actual numbers of bums on seats” (Post1). In a similar vein, the extent to which financial exigencies were driving course provision was recognised by the pre-1992s in the research. While these institutions expressed a commitment to maintaining a broad portfolio, like the post-1992, they also confirmed that the continuation of courses was linked to their financial viability. One complication for pre-1992s was that course continuation was increasingly a question of whether an institution chose to include or exclude a particular course from SNC or not. As one respondent explained, some courses are considered not viable “if they’re unable to recruit to ABB and above” i.e. they fall outside SNC (PreI, planning).

While the financial viability of courses was the principal stated consideration for all institutions, other factors said to influence portfolio review included: the standing of the subject within subject league tables, subject success rates, graduation rates and NSS scores. These were, overall, seen as “much bigger drivers” (Post1) than SNC. In one case, modules which were “tripping up far too many students and damaging their chances of really getting a good degree” had been discontinued (Post3).

In contrast to pre- and post-1992s which had already reduced, were in the process of reducing, or considering reducing, the number and range of courses and modules, specialist institutions were either consolidating their courses or planning modest expansion. Likewise all of the FEHE providers were looking for opportunities to expand, although this too was on a very modest scale in relation to existing degrees and was, in many cases, linked to building progression from pre-degree to existing degree programmes.

One trend that emerged across interviews was an expressed reluctance to develop new courses in favour of consolidating current provision. The effects of this reluctance were explained in two different ways. First, some respondents pointed to the intensification of competition in the changing HE landscape. This was said to be producing a focus on markets which led to risk-averse behaviour as indicated by this comment:

“This is a little bit of a shift in the institution; the institution at one stage historically took a marketing position which was to just launch programme titles in the hope that that would capture more of the market ... There is a move now to say that that probably is not necessarily the best strategy, it might confuse the marketplace and it may be better to consolidate around some what I might call traditional titles and then to allow flexibility within the curriculum development of what you can specialise in, rather than saying, you’ve got a particular form of engineering with [another subject], and you recruit two students to it.” (Post1)

This risk averseness would, it was reported, have an even greater effect at postgraduate level. The comment from Post1, for example, “I think the days of when there were postgraduate taught programmes which were the specialisation of a few members of staff may have come to an end”, throws an interesting sidelight on how the shifting undergraduate and postgraduate markets are linked via curriculum offer and student progression.

Second, some thought the current risk averseness due to increasing market competition would, sooner or later, lead to greater creativity in course design, as this comment illustrates:

“In terms of new courses I think everybody must be looking at courses which are marketable, as long as they’re high quality and ethically decent. I think it will stimulate some creativity ... I wanted to [develop] either postgrad or undergrad courses on serious disasters and complex problem solving but there wasn’t a great deal of hunger for that, although I think there might be one day.” (Post2)

8.2. Course closure and course rationalisation: sub-degree provision

The survey provided a clear insight into trends with sub-degree provision with seven respondents, all from post-1992 institutions, indicating that sub-degree provision, whether foundation degrees, HNDs or HNCs is likely to be discontinued across all subject areas. The main reasons given were that this provision has moved to their partner FE colleges. While this in itself points to the continuing importance of partnership between HEIs and FEHE providers in collaborative planning, interview and focus data seem to suggest the increasing prevalence of moves in the opposite direction. As indicated in section 4.4 above, the FEHE institutions in the research see the increased competitiveness produced by the core-margin policy and, in particular, direct funding to FEHE providers from HEFCE, as an opportunity for market expansion, as well as a constraint on relations with partner HEIs.

8.3. Subjects and disciplines affected by rationalisation

Survey respondents were asked if the reforms were expected to lead to course closures at undergraduate level and, if so, whether they were more likely to occur in some discipline and/or subject areas than others, ie arts; humanities; social sciences; subjects allied to medicine/health-related; and STEM. There were no anticipated course closures reported in STEM subjects or for subjects allied to medicine/health-related, and no pre-1992 respondent anticipated course closures. Among those subject areas where course closures are

anticipated, arts subjects were most often cited by all institution types with the exception of specialist institutions (15% of respondents), followed by humanities (12%) and then social sciences (5%). In response to a follow-up question which asked how many courses were likely to close respondents indicated that between one to five courses in the arts, humanities and social science disciplines were likely to close.

What emerged from the interviews was a general acknowledgement that, while all subjects are under greater scrutiny, some subjects were considered to be less at risk of closure than others. The finding here – that STEM, Medicine, Dentistry and sciences would continue to be supported and valued as prestige subjects – support survey data, although some institutions considered that Business would also be under least threat.

Conversely, areas and disciplines which had already been subjected to rationalisation include Education, humanities and arts, and there was agreement that these trends were likely to continue. Reasons for this varied considerably as the following comments illustrate:

“Education Studies degrees had already “gone” in one institution despite students obtaining the “highest degree classifications in the whole of the university.” (Post2)

This was not due to number controls but an outcome of what this interviewee felt was an “anti-intellectual” movement in teacher education which had turned “education” into “training [and] behaviour management”.

Some HE providers considered the changing landscape particularly adverse for humanities. One noted how humanities were “struggling to reposition themselves ... around the notion of employability [and] what they can offer” (Post2). Likewise, the arts were reportedly being squeezed by the employability discourse: “what the bloody hell do you want to do a History degree for, you’re not going to get a job are you? Which is the wrong advice.” (Post2).

The pre-1992s seemed less concerned with the effects on student choice of subjects arising from changing discourses about what a subject is for or what future career opportunities it may lead to, and more exercised by the problems of the effects for subjects of a small SNC allocation. For these institutions, the fact that there was no market for the subject area at ABB or above was particularly worrying. Subjects mentioned as at risk in this category included Social Work which, due to its market of “mature and middle A-level rate achieving market ... is always going to fall within SNC” (Pre1, planning) and, in addition:

“Archaeology, Music, anything that is specialist, [and] Social Work, Education; [and areas] not traditionally ABB and above ... social science subjects, humanities subjects [which] have seen a slight downturn over the last two years.” (Pre1, planning)

What this indicates is that, for some institutions, some subjects were being squeezed as the SNC was reduced in relation to the AAB margin. Of course, the squeeze on these subjects affects mature learners, part-time learners and widening participation students in particular. This interviewee noted that all of those groups whom the current financial environment was putting under increasing pressure would also be adversely affected by SNC-related pressures on the allocation of numbers to courses in highly selective universities.

8.4. Changes in mode of provision

The Government states its aim to create both a more diverse sector and a “more level playing field for higher education providers of all types” may be achieved, in part, through increasing diversity in mode of provision, ie through “greater opportunities for part-time or accelerated courses, sandwich courses, distance learning and higher-level vocational study” (BIS 2011b:5). These aims were only partially borne out by the research, and the reduction in numbers studying part-time, as previously indicated, is a move in the opposite direction from these aims.

Respondents to the survey, when asked if their institutions planned to change how it delivers learning, in terms of the following modes full-time, part-time, work-based learning, online learning, sandwich courses, accelerated learning programmes, indicate a high number of institutions planning to increase work-based

learning (WBL) (58%) and online and sandwich courses (both 40%). These responses lead to the presumption that institutions were increasingly planning to tailor courses towards employability demands, whether these demands originate with students or with institutions. One additional comment specified that their institution would have more courses involving a period of study abroad, thus providing students with a broader experience and greater opportunities for work as globally aware citizens. It was clear that institutions saw work-based learning opportunities as a significant factor in attracting students in a more differentiated market (perhaps in response to the reporting of DLHE data in Key Information Sets). Post-1992 institutions were the most likely to anticipate 'a lot more/somewhat more' WBL and sandwich course delivery and were the most likely to anticipate offering less part-time provision.

The research revealed little appetite for the development of a two-year degree market. However, almost three-quarters (71%) said they would be offering more bespoke degrees with shared modules in the future. Post-1992 institutions were more likely than the other institution types to anticipate offering more bespoke or niche provision. The subject areas most likely to be affected by the increase in shared and bespoke provision were social sciences (55%) with all other subject areas in the 35% - 40% range. This indicates that social sciences in particular, followed by arts then humanities subjects, are those most likely to diminish in number as single honours degrees and combined honours degrees but that elements of them will continue in the form of 'core' or 'elective' modules contributing to a range of other named degrees.

8.5. Changes in the use of online and blended learning

Forty per cent of survey respondents said they would increase numbers of online and sandwich courses, and all interviewees expressed very strong levels of support for increased use of blended, online and mobile learning to develop business strategically, improve teaching and learning, and support student learning. The caveat to this was that there were across-the-board reservations about the extent to which virtual modes of learning would replace face-to-face learning, and there was a preference for increased use of blended learning modes than entirely virtual online courses. The use of virtual learning environments (VLEs) for blended learning was anticipated across all disciplines, with the highest increase being humanities at 90% (18 responses) with STEM subjects likely to see the lowest increases in the use of VLEs although this was still high at 77%.

Across the research, and in relation to all subjects and disciplines, the expectation was that VLEs would be used as an addition to, rather than as a replacement for, existing provision.

The development of online, blended modes as an opportunity to generate business include the example of a post-1992 institution who saw it as part of their growth strategy for part-time students studying degrees in the workplace, in business, health and social care, construction, and to a lesser extent engineering. For this particular institution, the "large number of students now studying off-campus and through distance learning in the workplace, international partnerships, UK partnerships, [was] a big part of the business" (Post3). The pre-1992s had a similar orientation to growing online markets but those institutions in this research, at least, were most likely to focus on "niche areas, all postgraduate taught, where we've identified particular markets where distance learning seems appropriate" (Pre2, planning); a view corroborated by Pre3 who had also identified expansion opportunities in online off-campus courses with "part-time, particularly postgraduate students" whose off-campus learning would be supplemented by "coming on to university [and the] benefits from being on the campus" (Pre 3).

In addition to online modes as a business enhancement strategy, the benefits of online modes in teaching and learning terms were widely recognised. As already noted, online and distance learning was seen primarily as a supplement not a replacement for face-to-face courses. This comment from a specialist institution is representative of the views of most respondents:

"We are more interested than we were in thinking about blended learning but we do see ourselves as a face-to-face institution, so while one or two programmes have developed or might want to develop in the future a wholly distance learning mode, that's not our prime business ... Our reputation is on our face-to-face learning and [...] the higher quality the students can expect in the classroom, of each other as well as of the academics because they come from such a wide range of backgrounds." (Spec 2)

Many university leaders emphasised the importance of the social aspects of learning in taught groups and seminars as being the main reason for the endurance of face-to-face modes of learning. There was some reference to the belief that a university's duty is to provide learners with a repertoire of skills in online environments to enable them to work within contexts of increasingly global connectivity.

In the light of this ongoing allegiance to face-to-face modes of learning, most institutions were doing innovative work to integrate new online modes with traditional modes. Examples of this work in the research included: flipped classrooms which enables students to access the lecture before they leave home for the seminar (Spec2); lecture capture in which everything the lecturer says is captured on audio and released immediately to students along with the lecture PowerPoints and annotations (Pre3); and the widespread use of virtual learning environments for course handbooks, students' e-portfolios, reflective journaling and assignment submission. Moodle and Blackboard were the most widely used VLEs.

Indeed, the integration of VLEs into blended learning modes was ubiquitous across institutions. VLEs were: "Just the culture now. I'm sure that if I look really hard I'll find there's one or two that aren't doing it but, no, it's an institutional norm basically. It's what students expect" (Pre3).

Having said this, course variation in the use of online modes remained an important feature of the map of provision. For example, Spec I (planning) said the nature of their provision demanded that: "The majority of what we do does tend to be practically done in a room with bodies ... at the moment" (Spec I); while for another institution, the disciplinary differences remained salient: "I'm a geographer so field classes, field class preparation, is great and you don't want virtual field classes in my opinion." (Pre3)

One interesting development was the provision of mobile devices to support student learning. The pioneer in this respect was Post I institution which provided all first years with iPads with preloaded apps and courseware. While this had led to systems compatibility and course equity issues, there was an acknowledgement that iPads had the potential to make use of estates more efficient, and to increase the mobile learning opportunities for disadvantaged students who had to take long bus journeys to campus. For this university (Post I), the iPad project nicely combined business sense, marketing opportunities and learning development.

In contrast to the positive local institutional change initiatives regarding the use of online and blended learning, the purported power of MOOCs (massive online open courses) to transform the nature of higher education in the UK was met with considerable scepticism. A comment about the fetishisation of MOOCs which were really just "rubbishy online courses", on which:

"The student experience is pretty awful in most of them, the throughput rate is woeful for anybody who hasn't already got a degree usually, [and] there are all kinds of problems around quality." (Post2)

was pretty representative of all universities' attitudes to MOOCs. One pre-1992 expressed the view that:

"MOOCs ... will remain a niche activity, they're not going to change higher education radically and I think that's partly because they're essentially parasitic of established higher education and partly because they're essentially old-fashioned, you know, it's about the talking head ... and I don't see online discussion groups replacing seminars, I just don't think that's as effective or what students really want. So I think there'll be a role for MOOCs ... [in doing] assessment in an automatic way which, again, is hopeless for history. So for all those reasons I don't think we see MOOCs as being the future in any way, apart from specific niche activities." (Pre2, planning)

Other objections to MOOCs included the apparent reputational gain that seemed to be attached to MOOCs, deriving from the fact that the prestigious universities (such as Harvard) have already gone down the MOOC route. Scepticism was also expressed about the business model and here, criticism focused on MOOCs which purported to be philanthropic, open and inclusive but whose business-driven processes entail courses funded by alumni donations and taught by poorly-paid doctoral students working as academic interns. On the other hand, some thought that MOOCs aimed at professional development may provide a sensible business model, but only if they were of sufficiently high quality.

The potential power of MOOCs was identified in relation to the likelihood of prestigious universities beginning to attach credits to their MOOCs. If that happened, then there would be a real move towards credit transfer between institutions but this was more likely to happen with SOCs (small open courses) rather than MOOCs.

8.6. Teaching and learning space

Every institution had expanded and upgraded its facilities in the last few years, or were currently in the process of doing so. There had been upgrades to teaching rooms, new learning centres had been built, new lecture theatres and, in a few instances, whole new campus sites had been built. Even the FEHE providers, who are much more constrained by finance and estate than the HEIs, had developed shared HE facilities with their major HE partner, or built a new bespoke building for their HE provision, as well as upgrading their facilities. Such new facilities were viewed in terms of reputational gain and marketing advantage. Examples included: a new state-of-the-art TV production studio which had extended possibilities for collaborative work with local employers (Post2); new rehearsal spaces, a new theatre space, space for film and TV work, plus a new social space for students, and office space (Spec1, planning); new integrated public space within university learning facilities (Spec2); and wi-fi availability across campus spaces and dedicated student-only spaces (Pre3). Refurbishments, facilities upgrades and shifts in accommodation use were reported to be crucial to improving levels of student satisfaction, course identity and belonging as well as recruitment and retention. From the perspective of many institutional managers, such things are also crucial to league table position and, ultimately, market advantage.

For some HEIs there was a clear relationship between SNC and estate. One large city HEI with three sites commented on falling recruitment which, when linked to increased choice and competition had, for this institution, caused difficulties with proposals to close a site. This manager noted that “we are constrained to work within a certain student number in order to pay the bills” (Post1), a situation they felt was exacerbated by that particular city’s “slight overcapacity” in numbers of HEIs and by competition from other universities setting up campuses there as part of their expansion plans. A similar story about recent accommodation and facilities upgrades and student recruitment and retention having to take place “within the constraints of what we’re allowed to do in terms of planning” was told by a campus university (Post2).

The research also disclosed some interesting relationships between space, student numbers and subject areas. There was a continuing shifting of resources to particular subjects which were expanding due to high recruitment: for example, Science & Technology, Biomedical Sciences, and Performing Arts were growing and having new spaces created for them (Post3). Elsewhere, new facilities had been built to accommodate the growth in Engineering (Pre1, widening participation). However, some pre-1992 institutions reported that limitations on space impacted on the potential for recruitment of the unregulated ABB+ student population: “Departments haven’t been able to recruit another hundred students just because they’re there if they haven’t got space to teach or to accommodate them.” (Pre1, planning)

Some HEIs identified a shift of focus and increased flexibility in the utilisation of space. Post1 provides a good example of this, with moves away from fixed furniture in rooms with rows of computers to moveable desks and chairs on castors with laptops and mobile devices. These were seen to be a powerful way of reconfiguring space to promote more interactive delivery modes to develop “group working, social working, social learning, breakout groups” (Post1). Other HEIs also reported similar moves to reconfigure teaching spaces to facilitate space for small group teaching in response to student demand. It was acknowledged that such innovations in physical infrastructure “don’t come cheap” (Post1) but do point to something of a shift towards placing a greater emphasis on what works for students’ learning in the utilisation of space rather than what is convenient from an estates point of view.

HEIs also identified clear pressures on space, remarking that SNC had created volatile conditions for those institutions in which subject and programme reconfiguration has occurred, resulting in the expansion of some and contraction of other courses. One respondent, for example, noted the acute difficulties with timetabling

and rooming that occur when plans are made for “30 students and suddenly you've got 72”, and how this leads to problematic knock-on effects for the quality of the student experience (Post3).

FEHE providers also commented on sustained investment in refurbishments and new buildings. These ranged from a joint venture with a partner university in which both had co-invested in a bespoke HE centre, incorporating a student union and, more recently, in refurbishments (FEHE1) to the creation of a separate space for HE provision, with new signage and a distinct adult identity with social spaces separate from the sixth form (FEHE2).

8.7. Impact on staff

Shifts towards more flexible use of space, alongside the increased use of blended and online learning, and the promotion of active pedagogies and collaborative student learning, have implications for staff, particularly around desire to use IT, competence and confidence in digital literacy, and commitment to using innovative pedagogies to promote student engagement. This latter has been alluded to (7.5 and 7.6) and is dealt with below in more detail. However, the research also gleaned some information about how institutional leaders thought these changes may impact on staff with regard to deployment and contract type. HEIs were understandably wary about making any firm predictions about these hugely sensitive issues, nevertheless, the research provides a ‘snapshot’ of how institutional managers were thinking. Of course, the surprising removal of student numbers caps will also have consequences unforeseen by respondents in this research.

In response to questions about anticipated impacts on teaching and administrative staff, over 57% (16 HEIs) expected some teaching staff to be redeployed and over 60% expected the use of sessional lecturers to increase. We may presume course closure as the reason for the first but do not know what the presumed increase in sessional lecturers is due to. This particular finding has implications for institutions regarding the quality of students’ experiences of teaching and learning in a climate in which NSS scores are increasingly important and subject to competitive scrutiny, and in view of Gibbs’ (2012) research which found that sessional lecturers generally have a lower impact on students’ learning.

Survey responses indicated that around a third (32%) of respondents believed redundancy will have ‘some effect’ on staffing while 25% expect lecturing staff to have reduced hours, and over 40% anticipate the increased use of fractional contracts, a finding which may also have implications for the quality of students’ learning. However, which staff in which subjects or areas is not known. There were across-the-board expectations that the changes would have ‘some’ or a ‘significant effect’ on student contact hours (61%), on office hours (46.4%), and tutorial time (57% of respondents). Post-1992 institutions were more pessimistic than other institutional types about the effects on lecturing staff, with over 10% of post-1992 respondents expecting ‘significant effects’ in relation to the use of sessional lecturers, student contact hours, office hours and allocated tutorial time.

Reduction in administrative support resulting in redeployment was reported by 50% of HEIs responding to this question. Smaller numbers of HEIs thought administrative staff would be made redundant, have reduced hours or fractional contracts. Post-1992 institutions were most likely to anticipate ‘some’ or ‘significant effects’; pre-1992s were least likely to.

Interview data provided a more detailed picture of the multiple pressures on staff regarding institutional initiatives on teaching and learning. One of these pressures was identified as the need for teaching and learning innovations in some subject areas. For example, one interviewee expressed the hope that changing student demand as articulated in NSS scores would “bring the staff along” (Post1). A second pressure was due more directly to perceived links between learning and teaching and competitiveness between HEIs. One respondent said that learning and teaching “does need to be more cutting edge ... we’re going to have to find new things to do, new ways of things being more flexible” (Pre1, planning) and that:

“In this new climate that we’re going to be moving into ... competitive pressures will require institutions to up their game ... not just with L&T but with everything, the question of experimentation, flexibility, is going to be critical within institutions and higher education is not known for moving fast.” (Pre1, planning)

Interestingly this respondent thought post-1992s had the advantage because they have the “ability to move much faster generally than the older institutions” and the “reputational advantage” of the pre-1992s is “going to be potentially offset, not for Oxford and Cambridge, but for others if there isn’t a move to experiment and to improve [the] curriculum approach or various aspects of student experience” (Pre1, planning). This need for “innovation” in teaching in research-intensive universities was echoed by Pre3. A third factor related to concerted staff development initiatives, in some cases linked to an institutional push to encourage staff to obtain HEA fellowship status (Post1) which, again, indicates the renewed emphasis on teaching quality.

Interviewees recognised that staff felt more pressurised, more accountable than ever, and increasingly more stressed and that this was, in part, due to the perception that business models were becoming sharper and bureaucracies more overbearing. This comment is representative of general concerns identified in the research:

“Stress is manifest in staff right across the sector ... energy levels are suffering, motivation to a greater or lesser extent is suffering, I think people are feeling impoverished in terms of ... how they can develop themselves ... staff are confused about notions of entrepreneurship, has it always got to be about money, is there still a specific ethic in many universities or is it all about money.” (Post2)

This respondent thought staff vulnerability had increased because “they have limited control over some aspect of the datasets that represent them”, such as the NSS.

In post-1992s the drive towards research was seen as at least partly responsible for increasing pressure on academic staff. One interviewee commented that the strategic commitment to increasing the research profile had led to the recruitment of research active staff and all faculties were having to “part company with staff who didn't want to buy into that agenda”. The strategy was recognised as “probably a good thing [in] driving up research, driving up the quality of the student experience” (Post3).

Staff in the FEHE institutions reported somewhat different pressures, with recruitment of new staff to teach on HE courses which had expanded. Collaborative co-teaching arrangements with partner universities were seen as a welcome opportunity for staff development.

Impact of competition, choice and SNC then, even from the limited picture obtainable in this research, indicate the different forces currently impinging on staff. These forces are felt differently depending on institutional type, NSS scores, position in league tables, perception of place vis-à-vis competitors, and wider discourses on teaching and learning.

9. Responding to the student experience

BIS (2011b:25) proposes the need to improve information available to students in order to improve the quality of students' choices, alongside aims to increase the range and type of provider and range of provision. In an increasingly competitive higher education market in which students are positioned as consumers, it is thought that increased student choice will encourage HEIs to be more responsive to pressure from students on matters of teaching and learning, with the overall result that the quality of students' educational experiences will improve. Earlier in the report we indicated that the research findings suggest there is no linear relay between these factors. Rather, each factor – student choice, quality of teaching and learning, nature and scale of competitive pressure – is dependent on socially variable and institutionally-contextual conditions which make it problematic to 'measure' sector-wide 'improvements' with any accuracy. Nevertheless, and while recognising the already high levels of student satisfaction as recorded by the NSS (83% of students are "satisfied or very satisfied with the teaching on their course"), the proposal to collate metrics obtained from UCAS entry points, the NSS and DLHE into one place in Key Information Sets (KIS) is designed to enable students to make easier comparisons between institutions on such things as hours spent in different types of learning activity, bursary support available, and graduate employment opportunities. The improvement of student choice facilitated by KIS will, the White Paper proposes, refocus attention towards "excellence in teaching" in order to "restore teaching to its proper position, at the centre of every higher education institution's mission" (BIS 2011b:27).

One aspect of the research looked at how institutional responses to the student experience were linked to SNC choice and competition. Questions focused on:

- how were datasets such as Key Information Sets and the National Student Survey thought to be informing organisational change?
- how have the level of full-time or part-time fees in your institution been influenced by SNC?
- is SNC having any impact on student financial support arrangements?
- in what ways are the changes impacting on the kinds of learning or academic support you offer students?

The findings supplement existing research which explores institutional responses to enhancing the student experience (Trowler 2010).

Findings suggest that, for post-1992 institutions in particular, the NSS was a key driver *within* institutions in producing improvements to teaching and learning and *between* institutions at a local/regional level, while nationally, position in league tables remained key. We also found some emerging attention to the use of KIS within a more market-driven environment. SNC played little part in institutions' responses to the student experience, although the relation of SNC and student experience was perceived as vitally important in contexts of under recruitment and where retention was an issue. The research makes important links to existing case studies of institutional responses to the use of the NSS as a change mechanism (NUS/QAA 2012).

The analysis focuses on quantitative national metrics, such as the role of the NSS, league tables, and KIS data in informing institutional responses to the student experience; teaching and learning; institutional financial support packages targeted at individual students; the role of institutional student services in the student experience; and the impact of pastoral support.

9.1. Quantitative metrics and pressures to respond to the student experience

Interviewees identified three pressures arising from NSS scores, KIS data and league table position which they thought were increasingly driving their institutional responses to the student experience. These were:

pressures from perceived institutional competitors and aspirational peers; pressures from students; and pressures from parents. The intensification of these pressures were seen as part of a broader cultural shift across the higher education sector towards “value for money” now students are “forking out £9,000 in hard cash” (Post1).

Perceived pressures from institutional competitors were seen as part and parcel of a higher education regime in which national jostling for position as measured in NSS, KIS and league table data took precedence. The following representative comments note how this played out for each institutional type:

“Realistically we know we're never going to be in the top 20, we'd be delighted to get into the top 50 ... We'd like to be at the top of the modern universities. We're tracking it. We're interested in what [university name] are up to, they seem to be doing well, [university name] also seems to be doing quite well. So we keep tabs quite carefully on them.” (Post3)

These pressures were leading to a raft of worries for post-1992s which ranged from concerns about the nature of their institution – “I don't think universities are training colleges and there is a danger that with all the emphasis on employability you become a training college” (Post1) – to the need for a harder-edged attitude towards results:

“The script I use ... is ‘if you can't show me immediately what you do that makes a difference to student experience, reputation, retention, the joining up of learning teaching assessment, if you can't show me, then stop it, because you're vulnerable then because you're almost surplus to requirements’.” (Post2)

This in turn led to a general “nervousness” about “doing anything too dramatic until we saw how this year panned out”. (Post3)

With regard to questions about the role of national metrics in configuring institutional responses to the student experience, the specialist institutions seemed much more secure of their ‘place’ and confident in the ongoing distinctiveness of their offer. The vagaries of league table positioning did not worry them so much and that institutional responses to their student experience had always been “organic and student-centred” (Spec1, planning). This institutional group did not express any worries about the new pressures regarding improving the student experience “because it always has been that way for 20 years” (Spec1, planning) and because “we have always done well” in the NSS (Spec2).

In comparison, responses for the pre-1992 group were much more varied. Pre1, for example, were refocusing the student experience dimension of their branding and marketing campaigns away from the university's location in a “friendly, warm, down to earth” city to one:

“Much more focused on the academic excellence, on the research excellence, on the student experience in terms of the learning and teaching side of it. Because we get really good results from [the] NSS and ... for us to be able to compete within the AAB/ABB+ world, we've got to get out there a bit more in terms of demonstrating that we're a serious university ... if we're serious about retaining the best students and all the rest of it, then we need to get those messages out much more clearly and effectively.” (Pre1, widening participation)

The recognition of the increasing importance of national comparative datasets, such as the NSS, KIS and league tables, in driving institutional responses to the student experience, nevertheless went hand in hand with high levels of scepticism about the validity and accuracy of these measures.

Typical here were the views of one post-1992 interviewee who said the NSS had “had its day”, that it doesn't “really measure quality”, that the expectation that “our NSS scores always have to keep on going up and up and up” is unrealistic, and that “it probably will be very difficult to move it on” (Post1). Others worried about staff vulnerability in the face of increasingly managerialist uses of the NSS to compel change; some considered it open to canny manipulation at point of completion by students; others thought that students' misunderstanding of NSS questions was a serious issue (Spec1); while one comment pointed to the way in which one-off, unforeseen “disturbances” in timetabling or rooming can impact negatively on students' completion of the survey. One individual summed it up like this: “The NSS is a fickle instrument and any

decent academic knows the fragility of surveys” (Post2). These findings add to a growing body of disquiet about the NSS (Furedi 2012; Sabri 2013) and indicate it would be advantageous to students and the sector to develop better, more valid and more appropriate measures of student experience than the NSS currently provides, perhaps by going down the route suggested by the National Survey of Student Engagement which is currently being piloted (HEA 2014) and the HEFCE review of information for students.

Similar issues arose with Key Information Sets. While there was the view that KIS would have to be taken more seriously in future, due to the role they were increasingly likely to play in enabling students and parents to compare and contrast institutions and courses more easily, the research findings indicate that Key Information Sets were considered to be “misleading” in a number of respects. Their simplicity meant they failed to capture the detailed picture about the quality of teaching and learning (Post1, Pre2); their broadness meant they did not present a nuanced enough account of course differences (Spec1); and there was scepticism about the extent to which KIS data were being used effectively within sixth form advice and guidance processes (Pre1). NSS and KIS posed particular problems for the small college-based HE provider who remarked that putting KIS into place was “horrendous” because they lacked the IT infrastructure that larger HEIs have. They also thought it was “valueless” because data from the college-based course was aggregated with data from the university-based course, to the former’s detriment. As such, it gave a “false picture” of the student experience at the college. As with the NSS, the findings on KIS in this study point to the need for finer measurements to take more accurate account of contextual data.

9.2. Teaching, learning and the student experience

The responsiveness of institutions across the sector to improving the quality of the student experience has already been identified in relation to the strong promotion of student-centred learning modes, a desire to integrate blended learning with face-to-face learning (Section 7.5), and the use of space and facilities to provide new social and learning opportunities for students (Section 7.6). Survey and interview data also provided evidence of sustained reflection on teaching, learning and students’ experiences.

The goal to ‘benefit’ or ‘improve’ the student experience was noted as important by eight of the 14 respondents who provided anonymous open comments at the end of the survey, with many of these making explicit connections between improving teaching and learning and enhancing student engagement, a finding replicated by interviews with both pre-1992 and post-1992 respondents. There was a view that staff-student ratios and face-to-face tuition were key factors in enhancing student engagement and in generating high NSS scores, with an emphasis on increasing the use of technology to ensure that time spent with students is beneficial. As one respondent to the survey noted:

“Our approach to learning and teaching is to move towards greater student engagement and to utilise technologies to free up more time for meaningful contact between staff and students.” (Post-1992)

Another post-1992 survey respondent spoke of the institutional commitment to providing students with “good quality” time with staff, and another of “opportunities for deeper learning and a sense of course identity and belonging”.

Across the research respondents reported a strong affinity for the use of genuinely dialogic modes of teaching and learning in order to promote student satisfaction, course identity and belonging. This respondent’s comments represent a view expressed by many other HEIs:

“[We’re] providing more flexible models of engagement. Avoiding didactic PowerPoint sessions. Use student contact time for genuinely interactive, socially collaborative learning wherever possible ... Open up learning and make ‘paths where people walk’.” (Post-1992)

The widely expressed commitment to open, perhaps even radically collegial and democratic staff-student partnerships, contests the quite widespread fears about how a “monetized logic” (Ashwin 2012) may harm collaborative pedagogic relationships.

A small number of pre-1992s expressed the view that post-1992s were ahead of them with regard to innovative and/or partnership strategies in teaching and learning and that they were playing catch-up on this particular indicator of student experience. In contrast, the post-1992 view was work that had been done to improve the synergy between teaching and research was paying off: “We can make very close links and correlation between having the research active departments and where you see the student satisfaction [is] high.” (Post3)

Survey responses highlighted teaching and learning as a key concern for FEHE providers, in relation to the need to improve the student experience; the need to invest in IT infrastructure; and the attention to quality of teaching and learning.

9.3. Financial support and the student experience

Student financial support mechanisms have also changed as a result of the 2011 reforms. None of the respondents thought there was a direct link between SNC and the financial support offered by universities but there was anxiety that pressure to maintain or increase student numbers in future would introduce more competitive behaviours to attract students. There was some evidence of the emergence of institutional decision-making around what one interviewee referred to as financial choices being made to reward “hardship versus brilliance” (Spec1); and there was some evidence that both pre- and post-1992 institutions were diversifying the range, number and type of financial support packages on offer.

Responses to the survey question about institutions’ plans to change the level of student financial support (eg National Scholarship Programme (NSP) and other bursaries and scholarships) indicated that 55% of respondents expected to offer the same level of support as previously and 42% expected to offer a higher level of support. The funding of NSP does, of course, impact on institutions’ ability to re-shape financial support for all those that qualify (by residual household income) for any bursaries and scholarships beyond the NSP, and this is especially important for post-1992s who generally have far more students from low-income households than they can support through NSP than pre-1992s (HEFCE 2012; IFS 2012; McCaig 2014). Changes to the level of support were thought most likely to change the student profile by negatively impacting on those from lower social classes (80%) and from low participation neighbourhoods (73%), with no notable variation by institutional type.

It was notable, then, that some post-1992 universities with a widening participation mission said their large current and ongoing NSP commitments provided little room for any further manoeuvre:

“We have a large number of NSPs because of our social intake and at our peak we will be spending £2 million of our own money, which will be matched by another £1.5 million from Government, so it’s about I think £3.65 million ... That actually is a large amount of our commitment to the extra fee income that we’re generating from the £9,000, you have to spend a certain percentage of your additional fee income on various activities. So one of the consequences of the NSP, it’s kind of constrained us much more about what do we do with that additional fee income ... we have more students who will be eligible for NSPs than we have NSPs, so then there’s the question of what do we do with those ones who don’t get the NSP, so we have some schemes in place to provide that but they’re not as generous as NSP and that takes away a chunk of money which, if you were sitting in another organisation you might be saying, well actually with that chunk of money I could give £5,000 bursaries in cash, because NSPs have only a fee waiver or a limited amount in cash in the first year.” (Post1)

This interviewee reported that this made their university’s bursary support seem limited in comparison with its neighbours and competitors. However, student feedback indicated this was not something the institution need worry about because students did not see bursaries as an incentive, instead highlighting “campus, quality of the programme, course content, libraries, IT” (Post1) as the most important aspects of their student experience, in line with the findings of other research (HEFCE 2012).

Limitations on cash content of NSP bursaries had led to some universities offering pre-loaded smart cards to enable “payback from the £9,000”, where the card could be used for books and learning materials in the university bookshop or through the online bookshop (Post 1). Financial support to direct students’

expenditure in these ways was quite common, for example, another provider gave “discounted accommodation, discounted food vouchers, discounted transport” (FEHE1). The supply of iPads, courseware and mobile devices to students was enthusiastically embraced in some pre- and post-1992s as enhancing learning opportunities but regarded with suspicion by others as something you may do depending on “how desperate you are” (Post2). For this interviewee, the student experience was best enhanced not by loss-leading technical devices and McDonald’s vouchers, but rather by having “a good campus, a good chance of getting accommodation ... a place which has got a really good feel about it, good reputation” (Post2).

Fee waivers were not considered a particularly viable or attractive incentive and the overall view of all institutions, including FEHE colleges, was that students’ behaviour would only be influenced where fee waivers were sufficiently large. One HEI wanted to offer bursaries for living expenses not fee waivers, because “people aren’t as daunted as perhaps they should be by the fee thing, but they are put off by the living expenses” (Spec1, student experience).

Others had offered fee waivers for first year tuition only but found that students wanted cash instead (Pre1). Likewise, students at Pre2 preferred a bursary instead of a fee waiver. Indeed, there was consensus around the position that:

“Fee waivers were of virtually no value to the student, if you were going to give financial support to students then they need it now not when they’re 40 or 50 and may pay off their loan slightly earlier than they would otherwise.”(Pre2)

As stated, bursaries were valued highly both by students and institutions, and were regarded as a central component of a high quality student experience. Bursaries were not considered to be a motivator to attract students to a particular university (predicted grades did that job) although one FEHE provider did offer an Access bursary to enable students to progress and remain in HE within the college). For most HEIs, bursaries were perceived as extending students’ options once they were at university:

“When they come with a bursary they have options, they can live in halls of residence, they don’t have to take a part-time job. So with a bursary their student experience is enhanced dramatically and that’s what the students are telling us and that’s why the bursaries are so important [...] they see the bursary as really important.”(Pre3)

For these reasons this respondent considered it a “bad move” by OFFA to realign expenditure away from bursaries towards outreach, a move which, at least on the evidence of this research, seems counter to students’ wishes and may impact negatively on the student experience.

The second category of financial support – rewarding excellence – was implemented via various strategies to attract and retain high achieving AAB and ABB students. These scholarships were targeted to “encourage [students] to succeed on their course, we were being driven more by encouraging academic achievement rather than giving a thousand quid” (Post 3), though the emergence of such merit-based scholarships pre-date the new financing and number controls regimes (McCaig 2011; 2014). This strategy was adopted, and being actively considered, in both pre- and post-1992 mission groups. For example, Post2 institution had introduced ‘excellence scholarships’ to draw in students with high grades; while Pre1 had introduced three types of scholarships: a masters scholarship to encourage high grade applicants who knew at point of entry that they wanted to proceed to masters study; an international scholarship which gave students the opportunity for a funded placement overseas; and a university scholarship to attract high achieving students from local low participation neighbourhoods. While currently none of these schemes were targeted at specific disciplines or subject areas, the view was that such targeting was more likely in future.

Two institutions with significant proportions of part-time students felt NSP bursaries had not been helpful to this cohort. One of them had targeted support towards widening participation programmes rather than excellence programmes; and an FEHE provider had focused on targeting part-time students from LPNs as an emerging HE market.

Several universities expressed the belief that the NSP has been “a bit of a shambles from the start” (Pre1, widening participation), a “mess ... confusing from start to finish and students haven’t liked it” (Pre2, widening participation), and that they had not had long enough to see if it was working. Thus, there was some scepticism about Government policy to reorient NSP to support postgraduate level students in future when undergraduate student funding had not been properly thought through.

9.4. Enhancing the student experience through institutional student services

Institutional support is a central aspect of students’ higher education experience. It includes an array of services: student learning support (ie SEN, disability support, health and well-being, counselling, study support); learning centres and libraries; the provision of individual study spaces; open study spaces; and learning hubs. The majority of HEIs (70%) responding to the survey thought the demand for student learning support would increase.

Almost all respondents in survey and interview considered student services as a necessary and integral supplement to the academic life of the university. One interviewee said the recent enhancement of student services at their institution showed that students really were “at the heart of the system” (Spec1, student experience), as illustrated by recent investment in new posts to support student writing. This institution’s aim to achieve a more seamless integration of the academic and learning support dimensions of the student experience had been done alongside shifts in the discourse of student support from “what is your ‘problem’ or ‘diagnosis’ to what can we do to enable you to achieve your potential” (Spec1, student experience). However, what was a new approach in Spec1 was a long-standing practice in the FEHE colleges which have traditionally had a greater closeness to the student experience. FEHE2, for example, had a staff member with dedicated time to work one-to-one with their HE students.

In contrast, in some highly selective institutions there was a greater focus on targeting student support accurately:

“It’s much less of a deal for us than many institutions because of the nature of our intake, so by-and-large the majority of the student population is pretty self-supporting. We have very low non-completion rates and so clearly there are a small number of individuals where support is potentially quite important for them ... the more interesting discussion is about ways in which we can target support ... more effectively than we do at the moment, rather than seeing a big growth in that area.” (Pre2)

Only in one case was the view expressed that the enhancement of and increased demand for student services was related to “the expectation, you pay your fee ...” (Post2), a comment which directly links a rise of student consumerism to demand for institutional service provision.

With regard to provision of support for different forms of study, almost half (48%) of the survey respondents thought the demand for individual study space in silent areas would increase, which perhaps points to students’ needs for individualised learning, alongside opportunities for social learning, given that 43% thought changes to SNC and the student profile were leading to increased demand for open study space where students can chat and work collaboratively on tasks in groups. Institutions also anticipate increased need to support mobile learning and that the provision of fixed PC stations would not increase in number.

9.5. Enhancing the student experience through pastoral support

All institutions voiced a commitment to enhancing personal tutoring and pastoral support for students as an important aspect of the student experience, partly because it may now be included in KIS data (bundled into contact time), partly to improve retention, and partly because these forms of support are seen to substantially aid students’ personal development.

There was a view that a strong personal tutoring system was a necessary support to teaching programmes especially when tutoring focused on students’ development, employability skills and support for assessment. The focus in some post-1992 institutions concerned developing some students’ basic skills and students’

softer skills. Types of pastoral support ranged from voluntary drop-in workshops, to each student having an allocated tutor with an entitlement to a specific number of meetings per academic year, to weekly office hour-long drop-in times.

Formal systems of pastoral support were seen to be more successful than informal ones in enhancing retention and student success. However, all pastoral support was seen to provide a valuable opportunity to manage students' expectations and to create a supportive space for conversations, often about the fact that a degree course frequently involves hard intellectual struggle and serious time management. Some also noted the pastoral work that goes on daily and is embedded into having good relations with students. In Spec1 it was felt that these informal forms of support and coaching far outweighed the need for parity in terms of allocated time for pastoral support.

Tensions were identified in relation to: whether it was the role of academic or specialised academic support staff to provide this sort of pastoral support; the new emphasis on research in post-1992 contexts which had created competing priorities for staff and meant pastoral support was pushed more to the margins; and management concerns about how to reorient academic promotions to reward teaching and learning. In one instance, the aim to integrate pastoral support into the university's mission had met resistance from embedded institutional cultures (Post2).

10. Conclusion

This report has focused on the ways in which higher education providers, including colleges in which HE courses are delivered, are responding to the changing landscape of higher education. It has explored the implications of SNC, choice and competition and the impact they had and are having on the student profile and the student learning experience. The report has summarised the strategies institutions have deployed to manage change in the increasingly dynamic context produced by marketisation and competition for students, and considered the extent to which the number control policy (the 'high grades' and 'quality and value' margins) has stimulated a market distribution of places at both the top and bottom of the HE institutional hierarchy. The report has provided evidence that the following facets of institutional response to the policy are of particular importance: the strategic uses of student number control; the changing institutional focus; the changing marketing practices of higher education providers; the changing student profile; teaching and learning; and how institutions responded to the student experience. The research findings point to the variability of impact depending on institutional type group, and on the specificity of impact in relation to regional, local and institutional contexts. In this section we provide a review of the main findings.

10.1. The strategic uses of Student Number Control

While SNC was something all institutions had to come to terms with, different impacts can be traced for the different institutional groups. Inevitably the policy led to the greatest impacts affecting those institutions looking to increase their share of AAB+ (and later ABB+) students and those seeking to benefit from the removal of 20,000 places from core allocations that those in a position to offer provision at less than £7,500 could bid for. Thus, for the selective, research-intensive pre-1992 institutions and the FEHE sector, SNC usually necessitated a strategic rethink of a higher order. In contrast, for the largest group of middle-ranking post-1992 universities the SNC policy necessitated less strategic change beyond that which had been stimulated by the general move to a more marketised system over several years. This led to increased scrutiny of recruitment and retention, and in some case the closure of specific courses, and to increased tensions around the trading of numbers via their college partnerships.

In the view of those who participated to this research, the changes had not, in the first two years of operation, led to a market differentiation in fees or to a general redistribution of higher achieving students (those with ABB or above) between institutions. It is probable, therefore, that this realisation influenced the Treasury's Autumn Statement decision to fund an additional 30,000 places in 2014/15 and abolish SNC altogether from 2015/16 (HM Treasury 2013), something not anticipated by research participants in the months beforehand.

For pre-1992s the impact of SNC has been more mixed than some have expected. Respondents spoke of increasing complexity around the allocation of a shrinking core and how this has been reflected by a tendency towards a more centralised admissions decision-making process and the removal of a degree of flexibility of offer. While autonomous departments could historically reserve places for those that unexpectedly fell below the required grade, now they are often restricted only to those that meet the grade, with the spare numbers clawed back by the centre to use either for subjects likely to attract a WP intake or for subjects that the institution wishes to offer despite low numbers of highly qualified applicants. In this sense the harsh light of the market exposes the degree to which prestigious institutions - who often claim the inviolability of high entry grades as a reason not to 'socially engineer' places for WP students – may be using the symbolic 'brand effect' of very high grades selectively when it suits their purpose. One reported example of the strategic use of SNC to protect Modern Foreign Languages (MFL) provision in the face of a declining number of young people taking MFL at A-level. One pre-1992 responded by offering foreign languages as module combination options in what may prove to be a partial renaissance of the combined honours degree. This strategic use of SNC to protect breadth of subject offer in pre-1992s may partially explain why the numbers of students with BBB or below at pre-1992 institutions are at a record high in the 2013-14 admissions cycle (UCAS 2013). Subjects that do attract high numbers of ABB+ are increasingly grouped among those studying physical sciences, Medicine, Subjects allied to Medicine and STEM subjects.

We found that pre-1992 institutions spoke of insufficient applicants with an ABB+ profile in Modern Foreign Languages, Archaeology, Music, Social Work and Education. Where their SNC is as low as 20% of places, maintaining these programmes represents a problem that does not exist for post-1992s with lower numbers of ABB+.

While overall numbers have remained buoyant for post-1992s and interviewees report few actual instances of applicants 'trading up' to higher status institutions, the fear that this may happen in the future was pervasive. Therefore there was a certain logic for post-1992s, in particular, to anticipate this by raising their own entry requirements even where they doubt it will make that much competitive difference and fear the potential impact on the nature of the student learning experience, widening participation and their ability to maintain subject breadth.

We found that for those in the FEHE sector there was a trend towards increased competition with their university partners. For them, the introduction of direct funding for fees of £7,500 had provided a welcome opportunity to expand even if on a modest scale, although the negotiations over HE franchise numbers they received via their partner HEI had in some cases become increasingly fraught.

10.2. The changing institutional focus

Institutional changes of focus can be observed in relation to employability - a comparatively new concern for pre-1992s institutions - partly in relation to the higher fees and partly in relation to vulnerable subjects. The employability of graduates is increasingly seen as important across the sector. For some interviewees the emphasis on (KIS) including employability outcomes as reported in the (DLHE) survey has been the key driver; for others, particularly pre-1992 institutions and specialist institutions, the raising of tuition fees has been the key driver and this is linked with the protection of vulnerable subjects.

One post-1992 partly justified reduced provision on the basis that it freed up resources for more research staff and to support their REF-submission, while all post-1992s were exercised to show enhanced quality, mainly in terms of NSS scores and their impact on league table positioning.

Quality in HE is something that FEHE providers have to take more account of in the new landscape, particularly where they have shifted their focus to take on more direct HE numbers. For some FEHE providers, particularly those offering specialist provision, expansion has added to their institutional prestige and thus bargaining power in relation to their former HEI partners in a generally more complex environment. FEHE providers reported consolidation and expansion in current provision rather than new areas of provision. Most colleges have far less autonomy and have to be agile and reactive to new conditions, and, in at least one case, report competition from alternative providers. In one instance, we found that one post-1992 institution was planning a portfolio review with its largest college partners.

10.3. The changing marketing practices of higher education providers

Marketing and enhanced outreach within a fixed overall numbers cap and pressurised by SNC was essentially a zero-sum game at sector level: each winner was matched by a loser. The aggressive use of marketing techniques is viewed askance across the sector with potential harm to post-1992 institutions' high quality provision due to a negative overall institutional image. Nevertheless, the findings indicate that institutions were reviewing their own marketing and recruitment practices in order to capitalise on their means to target and attract particular groups, as well as scrutinising their perceived competitors' marketing practices a little more hawkishly. Overall, the view was that marketing needs to be based on real factors, such as enhanced employability outcomes and NSS scores. Two pre-1992s reported they had broadened the geographical scope of their outreach in a search for potential ABB+ applicants, and in one case this was allied with an approach to marketing that shifted from the 'warmth' and 'friendliness' of the university to one far more focussed on academic rigour and civic role. Findings indicate that FEHE providers are planning to increase recruitment and marketing spend to respond to the oncoming increase in differentiation among lower cost 'margin' providers.

10.4. The changing student profile

All institutions had experienced greater volatility in admissions and enrolments and this had generated a need for more sophisticated planning mechanisms. Two post-1992 institutions and all three pre-1992s had seen enrolments fall, although the scale of the fall, the discipline/courses affected and the reasons differed. The colleges had seen numbers fall in partnership arrangements but direct numbers from HEFCE had offset these losses. In contrast, the specialist institutions had maintained their numbers. The losses across the sector are likely to be temporary, in light of UCAS applications for 2014 entry and the Government's budget statement announcement of an extra 30,000 places in 2014-15, although admissions patterns across the sector may be less predictable than previously. These changing admissions patterns had influenced the student profile.

In terms of high grade applicants, the interview findings show that, while there was undoubtedly greater competition for AAB/ABB students among research-intensive universities, our respondents noted little redistribution of AAB/ABB places. This was mainly because most applicants with high grades already attended pre-1992s institutions (HEFCE 2011). Some Russell Group institutions have found the proportions of their intake with ABB+ is around 80% and expressed worries that this threatened their wider mission in a number of ways: it made it more difficult for them to offer the same breadth of subject discipline; to support widening participation and provide opportunities for mature students; and to accommodate EU students from a core allocation - SNC - of less than a fifth of all places. The converse of this is that under the SNC regime the recruitment of as many ABBs as possible becomes the major competitive nexus between pre-1992s. That the changing student profile was likely to exacerbate under-representation of WP students was a cause for concern for both selective pre-1992 institutions and those post-1992 institutions who were explicitly planning to move 'up market'.

The reported squeezing out of WP students from the most selective courses in research-intensive universities was accompanied by, in some instances, the 'funnelling' of WP students to particular courses with lower grade entry requirements. These changes mark some interesting realignments of student profile with courses/subjects and grades.

The research found there was a strong correlation between locality and numbers of BAME students for post-1992 institutions. The proportions of BAME students in both large urban universities and more rural ones were unaffected by SNC and expected to maintain their respective proportions of BAME students in their overall student profile. Pre-1992 institutions had a much lower proportion of BAME students. In one case this was due to the disproportionate number of applicants from this group applying for high grades subjects such as Medicine and Science and not achieving the required grades. One quite surprising finding was that one pre-1992 institution said they were not currently gathering sufficiently detailed data to map the BAME cohort by course as part of the student profile.

In terms of gender, the main finding was that traditional patterns of gender distribution by subject stubbornly persist across the sector, ie in pre- and post-1992 institutions where the female student population is larger than the male cohort, STEM subjects still had a majority male student population while areas like nursery and midwifery and healthcare professions were predominantly female.

The research also found the largest change in student profile was the decline in the numbers of part-time students as a proportion of overall student profile. All institutions had seen varying levels of decline in part-time students, some more severe than others. The same was found with mature students. The increase in fees and loss of employer funding were largely responsible for this.

10.5. Teaching and learning

With the exception of one pre-1992 institution, all institutions in the research had undertaken portfolio reviews prior to the operation of the new regime or were planning to in 2013-14. The findings suggest that course rationalisation has impacted on mode of provision, use of teaching space, and implications for staff in

some complex ways. SNC is just one factor in an array of multiple factors affecting courses and provision across the sector.

The findings show that course rationalisation was related to: failure to recruit sufficient AAB/ABB students for some courses in pre-1992s; failure to recruit sufficient students for some courses in post-1992s; standing of the subject within subject league tables; subject success rates, graduation rates; and NSS scores. One post-1992 institution has discontinued courses which were perceived as impacting on student completion and success rates. Pre- and post-1992s were focusing on consolidating current provision, via in some cases combined honours courses which included module combinations to save vulnerable subjects, and there was no appetite to develop new courses. FEHE expansion was in relation to current courses and courses closely-related to current provision, rather than new courses.

The research found variations in course rationalisation by mission group, subject and discipline. Across the board, STEM, Medicine, Dentistry and sciences were supported and valued as prestige subjects. Humanities subjects, and specialist subjects such as Archaeology and Music were under threat. Business decisions about course viability were being taken in the context of increasing worries about retaining a sufficiently broad portfolio (pre-1992s), and maintaining a commitment to participation for under-represented groups (post-1992s), while maintaining or improving league table position (all institutions).

There was a strong desire to enhance modes of face-to-face learning to improve interactivity and student engagement. This was linked to considerable recent investment in new buildings, redesign of teaching and learning spaces, and improvements in campus facilities to provide social spaces for students. While none of these changes are directly traceable to the student number control policy, they are linked to broader shifts towards increased competition across the sector within which the marketability of the campus in attracting students is seen to be key. Some pre-1992s felt they were playing 'catch up' on student engagement in teaching and learning, with some perceiving that post-1992s had the advantage in relation to innovations in student-centred modes of learning. Increasing moves to online and blended learning were seen to be inevitable with the emphasis on blended learning as an enhancement for, not replacement of, face-to-face learning. Some institutions saw mobile learning as a viable business opportunity for students wishing to study part-time. The findings indicate that many are yet to be convinced about the quality and longevity of MOOCs.

10.6. Responding to the student experience

Ongoing work to reflect on and improve the student experience in response to evidence from national datasets, such as NSS, has for a number of years been an integral part of institutional culture for HEIs if not for FEHE providers. In this context, it is difficult to disentangle the Government's aim to lever institutions to improve teaching and learning via the public availability of easily comparable data on a limited number of indices (BIS 2011b) from the many initiatives institutions already have in place to respond to the student experience. Over and above the scepticism attached to the validity and reliability of the NSS, in particular as a measure of quality, the findings indicated that competitive pressures were encouraging institutions to pay much greater attention to their own (and their perceived competitors) data and the picture of the student experience of teaching and learning it represented. In this, colleges saw themselves at a disadvantage as the data on their HE provision were bundled in with that of their HEI partner to the detriment of the former.

All institutions had a range of scholarship and bursary support targeted respectively at hardship and excellence. We found there was some diversification in the range, number and reach of pre-1992s excellence scholarships, both national and international. Bursaries on the basis of need were combined with a number of discounts, financial incentives and technological inducements (such as free iPads) but universities were not offering fee waivers as internal evidence proved students found these unattractive.

There had been considerable and ongoing investment in student services offering a range of support functions to students. These investments were seen as unrelated to marketisation and students' expectation of increased 'value for money'. Likewise, the enhancement of academic support via pastoral support and personal tutorials was seen predominantly as a means to promote students' skills and personal development, although

the inclusion of data on such sources in KIS was a factor in how institutions were responding to these aspects of the student experience. FEHE providers emphasised their closeness to their HE students as essential in the value and distinctiveness of their pastoral support offer.

10.7. Higher education in further education colleges

The report identifies the additional range of vulnerabilities and opportunities for FEHE institutions arising from the SNC policy and the market mechanisms introduced to increase student choice and sector competitiveness. We found colleges were keen to expand their provision of 'value for money' higher education but had in the past been hampered in doing so by franchise arrangements. SNC had, for some, produced increased tensions around negotiations over numbers with their HEI partners and they welcomed the allocation of direct numbers from HEFCE and the greater autonomy this conferred. These findings, following BIS (2012) and Brennan and Osborne (2008), point to the flexibility and agility possessed by FEHE providers as a potentially significant positional advantage vis-à-vis their larger HEI competitors. FEHE institutions' responsiveness to price; their ability to develop cost-effective, more flexible, part-time modes of study; their knowledge of student needs and local markets; and their greater closeness to and therefore ability to support students, are all likely to continue to be key factors in future if, as anticipated, additional providers enter the increasingly marketised system. Perhaps in recognition of the need to protect HEFE provision, and to ameliorate some of these competitive pressures for FECs, BIS is introducing SNC for alternative providers from 2014-15.

II. Recommendations

II.1. Recommendations for policymakers

Government and the sector should develop better, more appropriate quality indicators than NSS and DLHE currently offer. The pilot of the National Survey of Student Engagement (HEA 2014) and the use of the NSS to enhance teaching and learning quality and promote reciprocal dialogue between staff and students (Buckley 2012) provide good practice exemplars which should be used to inform institutional change and refocus Government policy on the measurement of students' experiences of higher education.

In the new context of uncapped growth Government should encourage closer collaboration between HEFCE and institutions to ensure that the range of provision more closely matches demand within a region.

Government should reduce its rhetorical emphasis on differentiation where it leads to the assumption that 'good' or the 'best quality' higher education can only be accessed at a few elite highly selective institutions that provide entry to just a few career pathways. There should be more concerted celebration of the good (and often highly demanded) provision offered by the vast majority of the sector and which serves the larger share of professions, occupations and students.

Government and the sector should consider funding transition support for applicants with BTECs and other former 'exempt qualifications', particularly with a view towards increasing progression of these applicants into pre-1992 institutions in a future context of uncapped numbers.

Government should consider a broader interpretation of the aims and purposes of higher education to achieve a more equitable balance between discourses of skills and employability and those which promote the pursuit of knowledge, the inherent value of subject breadth and the need to enhance social justice through widening participation among currently underrepresented groups.

II.2. Recommendations for the sector

There should be concerted efforts to enhance the collation and monitoring of information regarding different dimensions of the student profile, for example gender, ethnicity, social class, in relation to UCAS entry points, subject choice and institutional type. Increasing knowledge of BAME patterns of application, recruitment and course distribution will be crucial for all institutions in the coming years; as will knowledge of the characteristics of the FEHE cohort.

The sector should consider introducing more sophisticated information sources within KIS; in particular there is a need for better, more appropriate quality indicators than NSS and DLHE currently offer, and the authors note that HEFCE is currently working on this with the funding councils under the aegis of the Higher Education Public Information Steering Group. Currently they fail to capture the detail that constitutes quality in teaching and learning and their broadness means they do not present a nuanced enough account of course differences.

The sector should look at ways to enhance the scope for schools and colleges to provide better quality advice and guidance to potential higher education applicants in view of the scepticism about the quality of KIS information and its role in informing choice and students' decision-making practices.

II.3. Recommendations for institutions

With the relaxation of the student number cap and the competitive pressure to close poorly-recruiting courses institutions should consider reintroducing and/or expanding part-time and flexible provision.

Given the removal of market constraints on the admissions processes created as a consequence of the pressure to maximise the number of high achieving students, institutions should refocus on their efforts to embrace contextualised admissions.

Institutions should continue with endeavours to press for a recognition of the multifaceted nature of students' experience and consider taking up more nuanced ways of engaging students.

Innovations in teaching and learning should be celebrated and, in an increasingly marketised climate, the 'smarter' uses of contact time should be shared via good practice forums.

The oncoming removal of number controls presents pre-1992 institutions with an opportunity to consider a wider range of entry qualifications, particularly BTECs and other equivalent qualifications exempted under the SNC regime.

The scope for UK or international expansion opened by the use of blended learning, distance learning, or learning via MOOC should be considered in relation to student cohort markets (e.g. part-time), quality of provision and enhancement of learning, alongside a better utilisation of campus space or cost concerns.

11.4. Recommendations for further research

In the new context of uncapped growth and, in particular, the encouragement of new alternative providers into the market there is space for a programme of research focussing on the impact of further system differentiation. This should incorporate the impact on teaching, learning and student engagement/experience and any consequential impacts of tuition fee elasticity.

Case study-based research focussing on inter-institutional competition within selected locales, or within contrasting contexts, will be particularly important in the new context. This would provide 'on the ground' data of how competitive pressures are working. Such research will be especially timely in the context of the ending of number controls and the entry of new providers into the market.

Case study-based research focussing on the management of change in relation to admissions, course rationalisation, teaching and learning, and the student experience will be invaluable in revealing variation by institution type. These case studies could: a) provide examples of good practice in the management of institutional change; b) nuanced data about discipline and course-level impacts.

Research should be carried out into the feasibility of developing a compatible format for the presentation of qualitative data on the student experience (as currently undertaken in different ways by individual institutions) in KIS.

Research should be carried out into the impact of the removal of the numbers cap on the ways that institutions may be re-imagining their commitment to widening participation. More specifically, it would be opportune to investigate the impacts that raising entry requirements, discontinuing part-time and sub-degree provision and shifting outreach away from local cohorts might produce disproportionate effects for specific groups of widening participation applicants, i.e. under-represented groups such as students from low income backgrounds, some BAME groups, disabled students and those from care backgrounds.

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