Sector Round-up

Sector reports review: February to August 2016

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Abstract

This paper provides a summary of key reports and papers published by UK HE sector organisations between February and August 2016. The organisations covered include: Action on Access; Higher Education Academy (HEA); Higher Education Commission; Higher Education Funding Council for England (HEFCE); Higher Education Policy Institute (HEPI); Higher Education Statistics Agency (HESA); Jisc; Leadership Foundation for Higher Education (LFHE); National Union of Students (NUS); Office for Fair Access (OFFA); Office of the Independent Adjudicator (OIA); Quality Assurance Agency for Higher Education (QAA); QS Digital Solutions; Scottish Funding Council (SFC); Teach First; The Sutton Trust; UK HE International Unit; University Alliance; Universities and Colleges Admissions Service (UCAS); Universities and Colleges Information Systems Association (UCISA) and Which?

The themes covered in this paper include: the Teaching Excellence Framework; institutional capability in supporting teaching excellence and innovation; student satisfaction; the student experience; student complaints; university identity; supporting transition; transition to postgraduate studies; equality and diversity; the digital experiences of students; learning analytics; impact of continuous professional development; learning spaces; pedagogic research; resource discovery; teaching and freedom of speech; academic misconduct; employability; post-graduation experiences; studying abroad; internationalisation; transnational education; and alternative providers.

Headline statistics

In data released by HESA (February 2016a), 2.3 million students were studying for a qualification or for credit at 162 HE providers in 2014/15, a decrease of 1.4 per cent from 2013/14. Postgraduate (PG) enrolments decreased by 0.2 per cent and undergraduate (UG) enrolments decreased by 1.8 per cent between 2013/14 and 2014/15. Full-time enrolments increased by 0.1 per cent, but part-time enrolments showed a decline of 5.7 per cent over the same period.

HESA (February 2016b) also published staff statistics. The total number of academic staff in 2014/15 was 198,335 (194,235 in 2013/14), an increase of 2.1 per cent between 2013/14 and 2014/15. For full-time and part-time academic staff, the proportion of females were 40 per cent and 55.1 per cent respectively.

Teaching Excellence Framework

The UK Government published its White Paper (*Success as a Knowledge Economy*) which set out decisions and proposals for legislation (BIS, May 2016). The Government indicated its intentions to press ahead in implementing the Teaching Excellence Framework (TEF), using a phased approach, with a trial year commencing in 2017/18 and disciplinary pilots also in the pipeline. The White Paper reiterated that the TEF assessment framework should take into account outcomes for disadvantaged groups and also outlined the functions of the Director of Fair Access, which would be merged into a new body, the Office for Students, a regulator in place of HEFCE. The Higher Education and Research Bill completed its scrutiny in the House of Commons on 21 November and, at the time of publication, was in the process of moving into the Lords for its Second Reading Debate (6 December 2016).

In a HEPI paper, Darian (February 2016) explored the rating systems in other parts of the education and care sectors, as possible lessons for the TEF, on the basis that, though were very different to HE "their experience of ratings can offer interesting insights" (p. 3). The following were deemed to be of importance for a successful TEF:

- Stability in the organisation delivering the rating - though it was noted that significant changes to the quality assurance and regulatory frameworks could create uncertainty;
- The use of a wide range of evidence, including good outcomes data and visits – it was posited that, "The lack of good outcomes data presents a challenge for the TEF, and will make wider sources of evidence all the more important" (p. 4);
- The role of experts in developing ratings - though it was observed that, "While TEF ratings will draw on the expert views of a panel, this expertise could become more diluted with the possible move to subject-level ratings" (p. 4);
- Disaggregation, and comprehensive coverage, of ratings - in this regard, it was asserted, "The development of subject level ratings will be very important for the TEF, given that many students choose an institution based on their subject preferences… all institutions [need to be] sufficiently incentivised to apply for higher-level TEF awards, particularly those further education colleges with fees currently below the cap" (p. 4); and
- Inclusion of ratings in league tables and alongside a wider set of data.

Institutional capability: teaching excellence and innovation

HEFCE (August 2016a) presented findings of a small-scale qualitative study into the motivations of HE providers for pursuing

strategic-level innovations in learning and teaching. Referencing the Government's Green Paper (*Higher Education: Teaching Excellence, Social Mobility and Student Choice*), the study incorporated into its interviews and focus group questions on how the TEF proposals might affect participants' innovation plans. The study presents data on: the source of institutional innovations; their impact on the learning experience of students; and the financial implications for HE providers. Leadership emerged as the primary enabler; from enthusiastic champions, at any level of the organisation, to commitment from the senior management team. The report recommended, "unconditional funding [from sector bodies]… as a bridge between innovation and risk" (p. 13).

In an HEA-commissioned consultancy project, with the aim of identifying and investigating international examples of 'learning excellence and innovation' in relation to six themes (assessing learning; graduate employability; learning styles across cultures; pedagogic developments vis-a-vis new types of students; student retention and attainment; community engagement and co-development of curricula), Middlehurst et al. (March 2016) presented findings from 26 international HEIs. Their conclusions centred on features of organisation and management, and 'indicators of innovation and excellence'. In terms of the former, the authors noted, "Focused and sustained leadership is a common feature of many cases, alongside a variety of governance structures that may be inclusive, democratic and collegial as well as determined and corporate" (p. 9). Evaluation (formative and summative, quantitative and qualitative, internal and external) and "extensive use of metrics and cross-institutional benchmarking" (p. 10) were also key features in the institutions observed.

In a report to the LFHE, Dopson et al. (April 2016) provided insights on what is known about the impact and outcomes from leadership interventions; the conceptual underpinnings of leadership development research in HE. In their review of the literature they found that leadership development approaches in UK HE appears small scale, fragmented and theoretically weak, with many different models, approaches and methods co-existing with little clear pattern of consensus formation. The team proposed a broader conceptualisation of what leadership and leadership development is. They advocated one that moves beyond individual leaders and considers leadership processes in HE settings in more distributed, relational and contextual terms.

Student satisfaction and experience

The 2016 National Student Survey (NSS) data were released by HEFCE (August 2016b). Completed by 312,000 students from 155 UK institutions (excluding FE colleges and some specialist institutions), the satisfaction measures for each category in the NSS (with percentage change compared to 2015) were:

- the teaching on my course, 87 per cent (no change)
- assessment and feedback, 74 per cent (up one per cent)
- academic support, 82 per cent (no change)
- organisation and management, 79 per cent (no change)
- learning resources, 86 per cent (no change)
- personal development, 82 per cent (down one per cent)
- overall satisfaction, 86 per cent (no change)
- students' union, 68 per cent (no change)
- NHS practice placements, 88 per cent (up one per cent)

HEFCE (August 2016c) also published analysis of the responses received to its consultation on changes to the NSS, Unistats and information provided by institutions. 90 per cent of respondents either 'strongly agreed' or 'agreed' that the 2017 NSS include questions on student engagement, with a view to strengthening the role of the survey in improving learning and teaching.

In a survey completed by 15,221 students on the YouthSight panel, Neves and Hillman (June 2016) noted that the UK HE student experience is still a positive one, but students as consumers are becoming more demanding; they reported the following (as part of the annual HEPI-HEA *2016 Student Academic Experience Survey*):

- Satisfaction with the overall academic experience has been consistent and high, with 85 per cent reporting that they were either 'very satisfied' or 'quite satisfied'. The factor that was most strongly correlated with satisfaction was whether student expectations were met (or exceeded); three-quarters of students felt that their experience had been better than expected. In terms of demographics, UK-domiciled students of Black, Asian or Chinese ethnicity were less likely to be satisfied. In terms of accommodation, students who live in halls were most satisfied; there was also a contrast between first and second year students, providing further evidence of the 'second year slump';
- Students' perception of value for money (VFM) continued to fall, representing one of the main year-on-year differences. As with overall satisfaction, correlation analysis identified the importance of teaching quality in driving perceptions of value. This was ahead of other aspects such as class sizes, speed of marking assignments and staff research expertise. The authors proffered, "… students do equate contact hours and general levels of workload with value" (p. 4). There were key differences in perceptions of VFM by institution type, with higher perceptions among specialist institutions and the Russell Group, and lower among post-92 universities;
- As found in 2015, students placed a premium on staff demonstrating teaching skills, ahead of research expertise. Three-quarters of students felt that most of their teaching staff encouraged them to take responsibility for their own learning, with the majority also feeling that their teaching staff clearly explained course goals and were helpful and supportive. Specialist institutions scored particularly highly on ratings of teaching staff. By contrast Russell Group institutions did not score particularly highly on some teaching aspects, such as providing support to students or helping them explore their own areas of interest;
- In terms of wellbeing, the results provided strong evidence that UGs have lower levels of wellbeing than the rest of the population, and young people as a whole when measured against Office for National Statistics data;
- Students were asked where they would most and least prefer their institutions to save money. There was a clear priority placed on teaching and learning facilities, ahead of wider estate development; maintaining contact hours and learning facilities was ranked ahead of class size and staff research time; and
- When it was put to respondents that institutions should be allowed to raise their fees in line with inflation if they demonstrate excellent teaching, 86 per cent felt this was not a good idea.

Student complaints

The OIA (June 2016) published its 2015 annual report. In a year that saw new

legislation (the Consumer Rights Act 2015), the OIA reported the following trends:

- 1,850 complaints (from English and Welsh providers) were received in 2015, compared with 2,040 in the previous year; 59 per cent of cases were 'not justified', nine per cent 'partly justified' and four per cent 'justified'; the remainder were either not eligible, settled or withdrawn;
- It was noted that students on vocational and professional courses are the most likely to bring complaints to the OIA. More than twice as many complaints were submitted by students on Business and Administrative Studies courses than any other subject. The top five were: Business and Administrative Studies (370 complaints); Subjects Allied to Medicine (164); Law (163); Creative Arts and Design (128); and Social Studies (120);
- Students from outside the EU and PG students were disproportionately more likely to complain; students from outside the EU were more likely to complain about academic misconduct proceedings; and
- The main categories of complaints were: academic status (e.g. complaint raised after a student has failed an assessment), 64 per cent; service issues, 15 per cent; academic misconduct, plagiarism and cheating, six per cent; financial matters, five per cent; discrimination/human rights, four per cent; non-academic disciplinary matters, two per cent; and welfare and accommodation, two per cent.

University identity

Blackmore's (April 2016) report to the LFHE examined the idea of prestige in HE and highlighted a shift from a paradigm in which knowledge tends to be valued for its own sake, to one where its value is held more in terms of utility. The report investigated how a larger and more varied sector with more diverse access and participation, which is operating in a competitive global space, understands the role and meaning of prestige; in-depth interviews were undertaken with 20 heads of HE providers across the UK nations. In particular, the report considered how an understanding of prestige (and the related aspects of group and individual motivation) can enhance the likelihood of increasing efficiency and effectiveness across the sector.

The findings are framed by the distinction between 'prestige' and 'reputation', and how the acquisition of one or the other may influence the character of an individual institution and contribute to tensions between its overall purpose and the individual agendas of its academic staff. It is suggested that prestige in a university tends to be academically driven, in the sense that those activities that produce outcomes which are valued by academics have the highest status. Reputation, by contrast, tends to be won by paying attention to what others beyond the institution want. Interviewees suggested that institutions may be prestige-seeking or reputation-seeking, and that some institutions may be a mix of the two. Interviews undertaken with leaders in pre-1992 institutions indicated that the concept of prestige is core to institutional behaviour, although there were some tensions between discipline-based priorities and institutional initiatives. In the post-1992 institutions, it was more common for those interviewed to believe that only parts of an institution could aspire to be prestigious, and that achievement of reputation was a more appropriate aim. A strong message from a number of interviewees was that teaching-led institutions are considerably disadvantaged by the publicity attached to league tables that record institutional achievements not

relevant to their mission; the Research Excellence Framework (REF) was seen as a strong driver, but in some cases as having negative demotivating effects.

Interviewees noted tensions in how notions of prestige influence institutional behaviours around reorganisation, repositioning and merger. The Russell Group was often described as being a highly effective vehicle for conveying prestige, sometimes to the detriment of those not in the Group. Pre-1992 institutions tended to have a strong interest in comparisons with other institutions, with projection of global prestige exemplified by the formation of strategically beneficial alliances. In addition, prestige was a factor, although a variable one, in the experiences of engagement with regional development; for example, there was a perception of a less than perfect 'triple helix' relationship among university, industry and government at regional level.

Supporting transition

In a University Alliance report, Hooper (May 2016) presented case study findings and recommendations on the role universities can play in reducing inequality. Five themes, with recommendations, were highlighted:

- Access – deep and sustained partnerships with schools need to be nurtured, as well as collaborations (to reduce duplication) with other local stakeholders, such as local businesses, councils and charities;
- Retention – universities should continue to use data to track 'what works' in order to improve the impact of retention activities;
- Graduate success – universities should do more to adjust institutional practices and processes (e.g. ensuring entry processes, curriculum design and assessment procedures are interrogated), to ensure students' diverse learning and employment needs are met;
- Community engagement – to maximise impact in creating thriving cities and regions, local enterprise partnerships should involve their local universities in discussions about economic and social development as well as the local and regional skills policy; and
- Research – government should strengthen research on social inequality and education by encouraging funding streams, such as HEFCE's Social Innovation Pilot, to fund excellence wherever it is found and elevating the impact element of such research in the REF.

Sheffield Institute of Education (February 2016) published the first phase of a report, funded by OFFA, on understanding the impact of institutional financial support on student success of those from underrepresented student groups. This report examined the evidence five institutions (Sheffield Hallam; University of the West of England; Oxford; King's College, London; and the University of Bedfordshire) gather that help measure the impacts of their financial support packages in: (1) retention and progression; (2) success (degree outcomes, progression for further study and graduate employability); and (3) student wellbeing and engagement. This phase of the project was focused on identifying administrative data and measuring the efficacy of the various financial support packages.

The impact of financial support was also noted in HEFCE (July 2016a) commissioned research on the value of the National Scholarship Programme (NSP) from 2012/13 to 2014/15. Over 131,000 students from disadvantaged backgrounds received the NSP across the lifecycle of the scheme and, overall, it was found that it positively enhanced the student experience and student wellbeing. This was especially noted in reducing the need for paid

employment and enabling students to participate in social and enrichment activities like internships, extracurricular clubs and volunteering.

Over 16,000 applicants responded to a UCAS (July 2016) survey asking about the motivations and influences behind their university choices, and the factors that deterred them. The study authors assert that being certain about HE by age ten or earlier means a child is 2.6 times as likely to be at a more "competitive university" as someone who decided in their late teens. The most advantaged young people are more likely to be focused on university at a young age than their more disadvantaged peers. Further, 6,500 applicants gave reasons why they did not apply to the 'higher tariff' group of universities:

- Nearly half (49 per cent) thought the entry requirements to these universities were too high – more would have applied if they had known they had a chance of getting in;
- 41 per cent believed none of these universities offered the courses they were interested in – there was a lack of understanding of career pathways from 'academic sounding' degree courses;
- Three quarters said they would have applied to a higher tariff university if they were offered a travel voucher for an open day; and
- A quarter of the least advantaged students who did not apply to higher tariff universities said they felt the cost of living would be too high.

The survey also asked what students felt about the relationship between their HE choices and employment. The least advantaged were 30 per cent more likely to think the degree subject studied was key to employment; more advantaged applicants were 50 per cent more likely to think the university they went to was more important for securing a job.

In Teach First (August 2016) research, 37 per cent of UG students indicated that they always knew they would *consider* university as an option after school. It was also found that the figure varied dramatically depending on the student's background. Almost half of students from the wealthiest backgrounds said this, compared to just over a quarter of those from low income backgrounds. Similarly, almost double the proportion of students from the wealthiest backgrounds said they have "always known" that they would *definitely* apply to university (28 per cent), compared to those from the lowest income backgrounds (15 per cent). A 12 per cent point gap between the proportions of Russell Group students who said they always knew they would definitely apply to university (28 per cent), compared to peers at post-1992 institutions (16 per cent) was also noted. Nearly a quarter of students from wealthy backgrounds said they began to seriously plan their application during their GCSE years (23 per cent); one in eight students from a low income background said the same (13 per cent). Students from wealthier backgrounds were twice as likely to receive advice from their parents when writing a personal statement as their peers from low income backgrounds (59 per cent compared to 27 per cent).

There was also a 15 per cent point gap between the number saying they took part in non-academic extracurricular activities, like drama and sports, to strengthen their application (48 per cent compared to 33 per cent); they were also nearly twice as likely to report taking part in relevant work experience (41 per cent compared to 23 per cent of students from lower income backgrounds.)

In a report to The Sutton Trust, Sammons et al. (June 2016) explored young people's views and the importance they attach to going on to university, their beliefs about their own academic ability and their

experiences of school, to see how far these influences shape differences in A-level outcomes at age 18; beliefs about academic performance and abilities, is described in the report as 'academic self-concept'.

The results showed that students' aspirations, in terms of the importance they attach to getting a degree and their plans to go to university, are shaped from an early age by background, neighbourhood and educational influences. Nonetheless, it was also found that academic self-concept and aspirations both play a significant part in students' A-level outcomes, over and beyond the influence of background. The authors observed important differences among students in the general aspirations, in terms of the importance they attach to getting a university degree, which were already evident at age 14. Around 61 per cent believed it was very important to get a degree; only 13 per cent thought it of little or very little importance. 27 per cent of disadvantaged students compared with 39 per cent of those not experiencing disadvantage thought it likely they would go on to university.

In a poll of more than 1,000 UK students aged 19 and younger, conducted by YouthSight on behalf of Which?, 28 per cent indicated that they wished they had chosen different A-level (or equivalent) subjects for the degree courses they applied to. Further, in hindsight, 41 per cent of those surveyed felt they should have given more thought to which subjects would help them get into university (Which? April 2016).

In a HEPI report that looked at the underachievement of young men in HE and, in particular, young men from poorer backgrounds, Hillman and Robinson (May 2016) put forward the following recommendations:

- Fund outreach initiatives aimed at engaging young men with HE;
- Develop a 'Take Our Sons to University Day' modelled on 'Take Your Daughter to Work Day';
- Involve male role models in all widening participation activities;
- Set targets for male recruitment;
- Not to rush all young men into full time UG study upon leaving school or college;
- Alter pedagogy to take full account of perceived differences in the way men and women study and learn; and
- Apply learning analytics in a way of helping individual students from under-represented and underperforming groups, including men.

Rawson (July 2016) reported, for Action on Access, on the transition students from a care background make in entering HE. The report noted the following critical success factors: written institutional strategies; establishing Designated Members of Staff posts; developing bespoke programmes of events and interventions; offering bespoke bursaries; building effective collaborative partnership delivery; evaluating to improve effectiveness; and ensuring care experienced student voices are heard and included in programme activities and reviews of institutional procedures. The report includes supporting evidence and insights from LJMU.

In a case study produced for the QAA, Prowse (February 2016) describes how some Manchester Metropolitan University (MMU) staff engaged with a local college (Xaverian Sixth Form College), in order to better understand the prior university educational experiences of students. In the following phase of the project, college students visited MMU, to offer further reflections. As a result of the MMU visit to Xaverian, staff considered changes they might make in discussion with their programme teams in terms of curriculum,

assessment, learning and teaching design, and support (including academic personal tutoring and monitoring). For example, curriculum level changes included: ideas about topic coverage at A-level; problem-based learning approaches; possibilities offered by pre-university courses; and the potential of the extended projects that some students opt for at college. In the second phase of the project, repeated themes in students' expectations about university included notions of freedom and independence, as well as the level of challenge and concerns around support.

Another Sutton Trust report focused on access to HE in Scotland and included comparative data with England. In this study Hunter Blackburn et al. (May 2016) noted:

- The gap in university participation between young people from the most and least advantaged areas is higher in Scotland than in the other home nations, although it has closed more quickly than elsewhere. Scottish 18 year olds from the most advantaged areas are still more than four times more likely to go straight to university than those from the least advantaged areas; in England, those from the most advantaged areas are 2.4 times as likely to go to university as those from the least, and three times as likely in Wales and Northern Ireland;
- The four-fold access gap between the most and least disadvantaged entrants in higher tariff universities is not very different from that in other Scottish universities. This is in contrast to the seven-fold gap at higher tariff, mainly Russell Group, universities in England. It was thought that the provision of 720 funded places for disadvantaged students at the ancient universities since 2012 appears to have helped with recruitment to this group;
- The proportion of people entering any form of HE before the age of 30 in Scotland was slightly lower in 2013/14 than in 2009/10. 34.1 per cent of Scottish 18–30 year olds went directly to university, with a further 20.9 per cent entering HE through college. This compares with 47 per cent entering HE in England, which includes an estimated six per cent who enter HE in FE colleges and other non-university providers;
- Much, although not all, of the relationship between socio-economic background and HE participation is accounted for by previous educational attainment. It was felt that the messages young people receive in school about HE and subject choices, as well as the support they receive to do well in their Highers, are important;
- There has been improved access for disadvantaged students in Scotland as well as in the rest of the UK. Analysis of SFC data revealed this has been met almost entirely by the expansion of sub-degree programmes in Scottish colleges;
- Analysis of students' HE destinations showed that there is a growing tendency for socially advantaged students (those from managerial and professional and independent school backgrounds) to opt for courses in more selective universities;
- Analysis using HESA benchmarks indicated that there are important differences between the overall characteristics of the Scottish and English university sectors, with Scotland having a greater proportion of higher tariff, or more academically selective, institutions; England has a higher proportion of lower tariff, or less selective institutions. This reflects the fact that England has a relatively large number of post-92 universities, providing more places for students with lower academic qualifications. Given the well-established association between social

class background and educational attainment, the authors assert, that the profile of the Scottish university system was likely to militate against the inclusion of students from less advantaged backgrounds in comparison with other parts of the UK; and

- Interviews with Scottish policymakers showed that there was strong support for the principles of widening access. Contextualised admissions approaches were particularly endorsed, but there was a lack of detail about their use and effectiveness. Also, where strong competition for places was evident, interviewees felt that reserving a certain number for young people from disadvantaged backgrounds could be an effective way of increasing their representation.

Hunter Blackburn et al. conclude that, Scottish universities' efforts to widen access for students from poorer backgrounds have achieved only partial success. They also contend that it is not evident that divergence in fee policy has given Scotland any specific advantage compared to other parts of the UK, in relation to increasing overall levels of participation or participation by more disadvantaged groups. Hunter Blackburn et al.'s report illuminates data released by the SFC (March 2016) on participation indicators for Scottish HE institutions and the Council's *Learning for All* report (SFC, August 2016):

Postgraduate transition

HEFCE (July 2016b) presented analysis of transition from first degree qualifications to PG study. It considered students' first instance of PG enrolment and highlighted trends across one-year, three-year and five-year transition periods (from 2002/03 to 2013/14). The rate of one-year transition into any PG course fell between 2002/03 qualifiers and 2013/14 qualifiers, from 13 per cent to 11.5 per cent. However the rate of transition into PG taught (PGT) study was 6.5 per cent for 2013/14 qualifiers, a small increase on the 6.1 per cent rate for 2002/03, but a decline from the peak of 8.3 per cent for 2008/09 qualifiers. Analysis showed that the rate of transition into PG research (PGR) remained broadly constant, at 1.5 per cent for 2013/14 qualifiers. The highest transition rate to PGR were found to be in STEM subjects: specifically in Chemistry and Material Sciences, and Physics and Astronomy, which recorded five-year transition rates of 24.5 per cent and 24.1 per cent respectively among 2009/10 graduates. The highest rates of transition to PGR via PGT were also found in STEM subjects. However, relative to the direct transition rates, subjects in Arts, Humanities and Social Sciences were seen to rely much more on PGT as a stepping stone to PGR study.

In an HEA-commissioned study, Mellors-Bourne et al. (April 2016) investigated disciplinary and institutional variations in rates of transition to PG study in the UK. The research aimed to explore what underlies these differences and identify practice that results in more students progressing to PG study, chiefly from an institutional perspective. The study incorporated desk research with large-scale data analysis as well as individual institutional case study research. Adding to the HESA and HEFCE data, the authors noted institutions with the highest rates of transition to PGT provision tended to be small, specialist providers focusing on very specific disciplines such as Music or Art, and smaller institutions which that were centres for teacher training. Institutions with the highest rates of transition to PGR provision are predominantly Russell Group institutions. Synthesis of perspectives obtained from representatives in the case study institutions indicated that:

- It was not always evident where responsibility lay for any institutional strategy for PG progression, especially to PGT study. There was some perceived weakness around strategies for PGT provision more generally, at least for UK students, as many saw PGT provision to be driven by international student recruitment, while PGR provision was seen as more strategic;
- There were few overt strategies in relation to encouraging transitions from UG to PG study *per se*, other than relating to recruitment to an institution's own provision. This was reflected in what appeared to be very little activity that was intended specifically to promote PG study in general. This contrasted with strategies to enhance UG employability (upon which, in terms of graduate outcomes at least, the institutions are measured);
- Other than where PG study was a well-established requirement to enter a profession – such as Law, Psychology, Teaching or HE research – or for career progression (notably Engineering), institutions were not aware of, or articulating, strong labour market benefits of PG qualifications. Where such benefits were known, promotion of PG study could be seen as an integral element of an employability strategy;
- Where PG study was promoted to UG students, this could be as part of the taught curriculum and/or the co-curricular programme, such as through the careers service. In practice, most institutions had employability modules within the curriculum but these tended to focus on immediate transitions to employment. Promotion of PG opportunities within the same institution was much more prominent than of other opportunities, but not all promotional avenues were routinely used even for the former;
- Some institutions used informal mechanisms to expose students to PGR and researchers, such as during UG laboratory or practical sessions and, to a much lesser extent, formalised taster opportunities (and in some cases research internship programmes). These predominantly operated in support of PGR study, not PGT. There was considerable 'informal' promotion of an institution's PGR opportunities to talented and engaged students in the institution;
- PG recruitment and information events were held to raise the profile of PG study and, especially, to promote local opportunities. In some cases, these were PG fairs that showcased opportunities from a range of different institutions, but not all institutions were prepared to host them; and
- Institutions' careers services reported that they were happy to play a stronger role in displaying information about PG opportunities and providing information, advice and guidance to those considering PG study, but did not see this as a priority in comparison with transitions to graduate employment.

Equality and diversity

In data released by HESA (February 2016a) it was shown that a higher proportion of female students (56.2 per cent) than male students (43.8 per cent) were studying; this gender imbalance was more pronounced among students studying part-time, of whom 60.3 per cent were female. The proportion of female students was heavily subject-dependent, with wide divergence from the overall figure of 56.2 per cent. Subject areas with a high proportion of females included Subjects Allied to Medicine (79.4 per cent), Veterinary Science (76.2 per cent), Education (76 per cent) and Languages (69.5 per cent). Subject areas

with a low proportion of females included Architecture, Building and Planning (36 per cent), Computer Science (17.2 per cent) and Engineering and Technology (16.7 per cent). Participation in HE by students from ethnic minorities continued to increase overall. 21.2 per cent (20.4 per cent in 2013/14) of all UK domiciled first-year students of known ethnicity were from ethnic minorities and for full-time first degree students the figure was 24.5 per cent (23.8 per cent in 2013/14). There were substantial differences in participation of ethnic minorities across subject areas, ranging from 4.1 per cent (Veterinary Science) to 33.7 per cent (Law).

Of students who obtained a classified first degree, 22 per cent were awarded first class honours and 71.5 per cent were awarded either first or upper second class honours. The proportion of first class honours did not vary significantly by gender, but the proportion of upper second class honours was greater for female students (51.7 per cent) than for male students (46.6 per cent).

HESA (February 2016c) provides a further overview of student type, by socio-economic background. For instance, in 2014/15:

- 89.8 per cent of UK domiciled young full-time first degree entrants came from state schools, a gradual increase each year since 1998/99 when the figure was 85 per cent;
- 11.4 per cent of young entrants to full-time first degree courses and 12.8 per cent of mature entrants (who also had no previous HE qualification) to full-time first degree courses came from low participation neighbourhoods;
- For part-time entrants, there was a difference between young and mature with regards to this indicator. 15.6 per cent of young entrants and eight per cent of mature entrants to part-time UG courses come from low participation neighbourhoods and also had no previous HE qualification;
- The proportion of students in receipt of Disabled Students' Allowance was relatively small; the percentage of such students on full-time first degree courses in 2014/15 was seven per cent; and
- In general, a higher proportion of mature entrants than young entrants did not continue in HE after their first year. For full-time first degree entrants in 2013/14, the UK non-continuation rate was 11.8 per cent for mature entrants compared with six per cent for young entrants. In terms of those who return after a year out, 11.4 per cent of young full-time first degree students and 11.3 per cent of mature full-time first degree students in this category returned to their original HE provider in 2014/15, with a further 13 per cent of young full-time first degree students and 5.7 per cent of mature full-time first degree students transferring to another UK HE provider.

Two reports produced by OFFA (May 2016; July 2016) provided insight into the progress made by institutions in 2014/15 in relation to access agreement monitoring and the mechanisms used to support this progress. It was noted that "positive progress" had been made on 88 per cent of the targets universities and colleges had set themselves through their access agreements (OFFA, May 2016). OFFA (July 2016) noted:

- HE institutions report a more advanced and embedded approach to evaluation than FE colleges; HE institutions with low proportions of students from disadvantaged backgrounds were the most likely to actively evaluate activity. Institutions with more developed and embedded evaluation activity generally reported more progress against their high-level outcomes targets;
- Evaluating how participants feel about their experience was the preferred type of

evaluation for both HE institutions and FE colleges. Kirkpatrick's (ND) evaluation model as a framework is cited in the report. The model focuses on four areas: reaction (how participants feel about their experience); learning (the increase in participants' knowledge and skills); behaviour (how far learning is applied and results in personal change); and results (how far the programme impacts on organisational and societal factors).

HEFCE (July 2016b) in their analysis of transitions into PG study, also reported on equality and diversity issues. Their data revealed that disadvantaged students, those from low participation areas, were less likely to undertake PG study. BME graduates were more likely than White graduates to go into PGT study immediately after graduating, and also more likely to return to PGT study after a break. Conversely, White graduates were more likely to immediately enter PGR study than BME students, with 1.7 per cent versus one per cent for 2013/14 qualifiers. Despite BME qualifiers being more likely to transition to PGT study, they were less likely to transition to PGR via PGT.

As far as gender is concerned, the HEFCE analysis also determined that male graduates were more likely to progress on to PGR study than female graduates. It was rationalised that this was, in part, owing to the proportion of male students studying STEM (Science, Technology, Engineering and Mathematics) subjects at UG level, as more STEM graduates were likely to proceed to PGR study. Male graduates were also found to return to PGR after a break in study and to enter PGR after studying at PGT level.

In Sutton Trust funded research (Kirby, April 2016) into the educational backgrounds of those at the top of the UK's professions, the highest proportion of Oxbridge alumni included: Law [Barristers], 78 per cent; Law [Judiciary], 74 per cent; Law [Solicitors], 55 per cent; Journalism, 54 per cent; and Civil Service, 51 per cent. It was also found that just under half of HM Cabinet had an Oxbridge education; 63 per cent of Nobel Prizes were awarded from those with an Oxbridge education.

Digital experiences of students

Jisc piloted a tracker tool for HE and FE and skills providers (Newman et al., June 2016). The tracker aimed to provide a snapshot of learners' digital experiences so that institutions "can better understand this aspect of the learning experience and plan to support learners more effectively" (p. 4). A total of 7,425 students from 12 HE institutions engaged with the questionnaire; the results were compared with responses from 3,326 students from 12 FE and skills providers and it was found that:

- When asked whether they had done a particular activity in the last six weeks, 62.8 per cent of HE students indicated that they had been asked to work online with others as part of their course; this compared with 46.6 per cent of FE and skills students. Further, 34.9 per cent of HE and 32.6 per cent of FE and skills students had been asked to create a personal record of their learning in the same timeframe (e.g. using a blog or e-portfolio);
- When asked whether enough guidance and support had been provided on particular activities, 58.5 per cent of HE students agreed that they had received enough guidance and support to help them use their own devices; 56.1 per cent on developing digital skills relevant to their course; 63.7 per cent on behaving safely or respectfully online; 32 per cent on modifying devices to suit individual needs; and 46.3 per cent on creating a

positive online profile (e.g. LinkedIn, CV, e-portfolio);
- 72 per cent of HE students agreed that when technology is used by teaching staff, it helped their learning experience and 58.1 per cent felt that online assessments were well delivered and managed. A fewer proportion of HE students (37.5 per cent) felt that they were given the chance to be involved in decisions about digital services; and
- HE students wanted their institutions to: offer recorded lectures; make better use of VLEs (standardise use by staff, with presentations and mobile friendly); improve online services (e.g. more online resources or activities). Communication was also flagged as a major concern to HE students (particularly receiving irrelevant emails and 'death by PowerPoint').

Learning analytics

Schlater et al. (April 2016), in a study for Jisc, examined the impact and future application of learning analytics. Their study conceded that research and development in this area was still at an early stage but proffered four areas of impact:
- As a tool for quality assurance and quality improvement with teaching staff using data to improve their own practice, and institutions using learning analytics as a diagnostic tool on both an individual level (see below) and a systematic level (e.g. informing the design of modules and degree programmes);
- As a tool for boosting retention rates – with institutions using analytics to identify 'at risk' students and intervening with advice and support at an earlier stage than would otherwise be possible;
- As a tool for assessing and acting upon differential outcomes among the student population – to closely monitor the engagement and progress of sub-groups of students, such as BME students or students from low participation areas; and
- As an enabler for the development and introduction of adaptive learning – i.e. personalised learning delivered at scale, whereby students are directed to learning materials on the basis of their previous interactions with, and understanding of, related content and tasks.

These ideas are broadly in line with an earlier Higher Education Commission (January 2016) report, which recommended:

- All HEIs should consider introducing learning analytics but any decision should be fully informed by an analysis of the benefits, limitations and risks attached;
- HEIs should put in place clear ethical policies and codes of practices that govern the use of student data in analytics;
- HEIs should seek fully informed consent from students to the use of their personal and learning data in analytics;
- Learning analytics should be driven by improvement of learning and teaching processes and student engagement; learning analytics, at the current stage of development, should be used for formative rather than summative purposes;
- HEIs should immediately review their internal data management approaches;
- HEIs should ensure that digital literacy, capability and good data management strategies are an integral part of their strategic plans;
- The digital agenda should be led at an appropriate level within the institution;
- Teaching and administrative staff need to be equipped with the necessary skills to perform their roles in a digital, data-driven world; and
- Institutions should be encouraged to use the information from learning analytics to identify and foster excellent teaching,

including a consideration of using this information in submissions to the TEF.

Continuous professional development

In a literature review for the HEA, Kneale et al. (April 2016a) examined teaching development/CPD in HE and accounted for recent changes to funding and priorities in the UK HE sector. The team's review strategy included conducting journal and Google Scholar searches for publications between 2012 and 2015. The review team noted there is little research that considers the relationship between engagement with the UKPSF (UK Professional Standards Framework) and impact of CPD, nor a sufficient body of research on the complexities and range of contexts (e.g. institutional, disciplinary) and the way in which the impact of CPD might be both determined and evaluated in relation to context. Furthermore, the literature did not cast much evidence on how students directly experience the impact of CPD or on understanding the complexity and challenges of collecting evidence related to the impact of CPD. A separate toolkit (Kneale et al., April 2016b) aimed at capturing the longer-term value and impact of CPD for teachers and learners, informed by the literature, is proposed by the review team.

Learning spaces

The SCHOMS, AUDE and UCISA (February 2016) *UK Higher Education Learning Space Toolkit*, whilst primarily aimed at staff who will be the lead for their professional area in a learning space project, contains useful information for those in teaching roles. In Section 5 of the publication, a review of learning technologies aims to provoke thought about how new spaces can support learning practice.

Education research (REF)

Kneale et al. (June 2016) explored the REF Impact rules on the submissions of HE pedagogic research to Education (Unit 25) [Unit of Assessment - UoA25 Education] to REF 2014 in an HEA-commissioned report. The study involved desk-based research and interviews with 15 HE REF/pedagogic research-related staff at 13 HEIs. The authors found that:

- Of the 76 HEIs submitted to the Education REF, the most successful submissions came from Russell Group universities, those who had a representative on the REF assessment panel and other pre-1992 universities;
- In relation to other UoAs in Panel C, the Education submission overall had a higher than average proportion of 4* outputs and impacts, but also a higher than average proportion of 1* and 2* submissions;
- HE-related outputs in the whole of UoA25 submissions was far lower than other education sectors (e.g. primary, secondary);
- HE outputs were published in a total of 122 journals, with half of these published in ten journals;
- Of the 106 named research groups in the Education UoA, only five explicitly include 'higher education' or 'HE' in their title.

Resource discovery

Wolff et al. (June 2016) report on survey results completed by 6,679 UK academics on their views on resource discovery, use of online and digital resources, attitudes to data management and many other research and teaching-related issues. The data are stratified by Research Libraries UK (RLUK) and non-RLUK (RLUK is a consortium of 37 of the major research libraries in the UK and Ireland), discipline, institution type and

other demographic characteristics. The teaching-related findings included;

- In designing or structuring UG courses, 84 per cent of respondents indicated that they often or occasionally gave preference to assigning course texts or materials that are available through the library and 75 per cent that they informed a librarian when their course reading list of syllabus is issued to students; those in Humanities or Social Sciences performed these activities more frequently than Science and Medical/Veterinary academics. Respondent from non-RLUK institutions were more likely to perform these activities;
- 68 per cent of respondents strongly agreed that improving their UG students' research skills was an important educational goal for the courses they teach; scientists and RLUK institutions were less inclined to agree with this compared to respondents from other disciplines and non-RLUK institutions;
- 57 per cent of respondents strongly agreed that 'librarians … contribute significantly to … students' learning by helping them find, access and make use of a range of secondary and primary sources in their coursework'; this represents an eight per cent increase since the previous survey in 2012; an eleven per cent increase was also noted when respondents were asked to determine whether librarians contributed significantly to their students' learning by helping them to develop their research skills. 40 per cent of respondents felt that it was principally their responsibility for developing the research skills of their learners;
- 32 per cent of respondents strongly agreed that their UG students have poor skills related to locating and evaluating research information, up four per cent since the 2012 survey. Respondents from non-RLUK institutions were more inclined to agree with this, compared to those from RLUK institutions (39 per cent versus 29 per cent, respectively);
- 65 per cent of respondents expected their first and second year UGs to be able to locate and use secondary academic sources in their coursework and research projects beyond the readings they were directly assigned; about half expected these students to locate and use primary sources. Scientists had lower expectations for these students locating and using both primary and secondary sources, compared to their colleagues from other disciplines. Respondents from non-RLUK institutions had higher expectations for both types of sources compared to those from RLUK institutions;
- Roughly half of respondents strongly agreed that they would like to adopt new pedagogies afforded by digital technology; Medical/Veterinary academics were more eager to adopt these pedagogies or approaches, compared to academics from other disciplines. 27 per cent strongly agreed that their institution offered excellent training and support that helped them adopt these pedagogies and approaches; scientists were less likely to agree that their institution offers excellent training in this regard;
- 37 per cent of respondents strongly agreed that open access, open source or freely available instructional resources play a very important role in their teaching but, approximately two in ten respondents, strongly agreed that they found it difficult to locate those resources; and
- 56 per cent of respondents strongly agreed that the primary responsibility of their college or university library should be in supporting UG student learning, an

increase of eight percentage points since 2012.

Teaching and freedom of speech

Using YouthSight's OpinionPanel Community, HEPI and YouthSight Monitor administered a survey to elicit full-time UK UGs' views on free speech (Hillman, May 2016); a total of 1,006 people responded to the survey. On the question related to teaching materials, ('If academics teach material that heavily offends some students, should they be fired?'), 15 per cent either agreed or completely disagreed with the statement. 55 per cent of respondents felt that university staff should engage in mandatory training activity that "teaches the ability to understand other cultures" and, when asked whether academics should be free to teach and research what they like, 45 per cent opted for one of the two 'agree' options, with 35 per cent choosing the neutral option.

Academic misconduct

In a report looking at the practices of 'essay mills' and their threat to UK HE, QAA (August 2016) concluded that there was no single solution. They advocated a "multi-faceted approach", building on good practice already being embedded in universities and colleges, 'designing out' opportunities for plagiarism and detecting and penalising academic misconduct. The report identified the potential for working globally.

Employability

HESA (June 2016a) published the results from the Destinations of Leavers from Higher Education (DLHE) survey for 2014/15. It was found that 72 per cent (286,325) of leavers (both full-time [70 per cent, 228,450] and part-time [77 per cent, 57,880]) were working, either in the UK or overseas, a slight increase from 71 per cent of leavers in 2013/14. A further six per cent were working and studying, 13 per cent were involved in further study, five per cent (full-time, six per cent; part-time, three per cent) were unemployed (the same as in 2013/14) and the remaining four per cent were involved in some other activity, such as taking time out to travel. HESA's DLHE analysis is stratified further by examining trends in each home country.

The percentage of full-time first degree leavers who were unemployed varied between subjects, ranging from those which have traditionally low percentages, such as Medicine and Dentistry (less than one per cent), Veterinary Science (one per cent), Education (two per cent) and Subjects Allied to Medicine (two per cent) to those with higher percentages of unemployment such as Computer Science (ten per cent), Mass Communications and Documentation (eight per cent), Physical Science (eight per cent) and Engineering and Technology (eight per cent). Although the Computer Science leavers held the highest percentage in terms of unemployment, this had dropped steadily since 2011/12 (when it was 14 per cent). For Science subject areas 71 per cent of full-time first degree leavers were in employment (either in the UK or overseas) and five per cent were unemployed. For other subject areas 69 per cent were in UK or overseas employment and six per cent were unemployed.

Using DLHE data, HEFCE (August 2016d) published analysis of the employment outcomes of UK-domiciled students who qualified from a full-time degree course at an English HE provider in the academic year 2010/11 compared with their 2008/09 counterparts, an update to their 'equality and characteristics' report (HEFCE, 2015). Two broad outcomes were reported: 'professional employment rate' (graduates in professional employment, or further study) and 'employment rate' (graduates in any form of

employment). The following key points were noted:

- A higher proportion of 2010/11 graduates were in employment six months after graduating than those who graduated in 2008/09, and a 3.4 percentage point decline between 2008/09 and 2010/11 graduates in the proportion of students in further study six months after graduation;
- The proportion of graduates in professional employment between six and 40 months after graduation increased substantially for both 2008/09 and 2010/11 cohorts. In both cohorts, male graduates were found to have higher professional employment rates six and 40 months after graduation, whereas female graduates were found to have higher overall employment rates;
- The differences in overall employment rates between White graduates and their BME counterparts were found to be smaller for graduates in 2010/11 than in 2008/09. The data also revealed that differences in professional employment rates had not improved and BME graduates mostly had much lower professional employment rates, especially 40 months after graduation; and
- Graduates from the most advantaged backgrounds were found to have substantially higher professional employment rates than those from the least advantages backgrounds, at both six and 40 months after qualifying, for both cohorts.

Employability and post-graduation experiences

The NUS (August 2016) continued their analysis of a study which started in summer 2015 and involved the first set of graduates "lumbered with £9,000 fees." 598 people responded to a survey, of which 522 were English-domiciled for the purpose of student fees and funding. The sample contained a representative mix of institutional types and ethnicities (though, "with only slightly lower proportions of Black and Asian respondents" (p. 4)). The data revealed that:

- 52 per cent of 2015 graduates were in full-time work, with 13 per cent working part-time. Eight per cent were unemployed; the lowest levels of employment were found in the Creative Arts, where 16 per cent were unemployed and ten per cent declared themselves as self-employed;
- Three times as many full-time working men than women graduates were earning over £30,000; twice as many women than men were earning less than £15,000. Arts students, on average, were earning considerably less than other graduates;
- Half of 2015 graduates thought their degree was not worth the fees they had paid; 71 per cent remained concerned about their level of student debt; and
- 60 per cent of graduates still had existing non-student consumer debt left over from their degree (the average amount being £2,600); 46 per cent had accumulated further debt since leaving study. 52 per cent of 2015 graduates aged 25 or under (and 47 per cent of all graduates) were living back with their parents or guardians (including 43 per cent of those in full-time employment); fewer than three per cent of graduates aged 25 or under had managed to get on the property ladder.

International student numbers

According to HESA (February 2016a) a large proportion of students studying in the UK were domiciled from the UK before they entered HE (80.7 per cent); a further 5.5 per cent were from other countries within the EU and 13.8 per cent were from countries outside the EU. These

proportions varied by level of study. 38 per cent of PG students were from outside the UK compared to only 13.4 per cent of UGs. Other EU PG students comprised of 8.6 per cent, whilst UGs consisted of 4.5 per cent and the corresponding figures from non-EU countries were 29.4 per cent for PG students and 8.9 per cent for UG students. Students from the UK had the largest proportion of UG students at 81.8 per cent, while 62.9 per cent of students from other EU countries were UGs and less than half (49.3 per cent) of students from non-EU countries were on UG courses. Among UG students from outside the UK, the highest proportions came from Asia (42.7 per cent) and the EU (33.8 per cent). The next highest proportions were from Africa (6.4 per cent), the Middle East (5.7 per cent) and North America (5.1 per cent). Students from outside the UK were well represented in Business and Administrative Studies (38.4 per cent), Engineering and Technology (33.1 per cent), Law (26.3 per cent), Architecture, Building and Planning (25.4 per cent) and Mass Communications and Documentation (23.0 per cent).

International: studying abroad

Based on findings from almost 60 focus groups and more than 1,800 survey responses spanning 15 cities and 11 different countries, a QS Digital Solutions (July 2016) report focused on three key themes: motivations for studying abroad, employability as a key driver for international mobility, and rankings and other sources/influences that shape students' choices. Aside from anticipated professional gains, the study found that students worldwide are also strongly motivated by the quality of teaching, access to more specialised programmes, the opportunity to build professional networks across borders and the acquisition of 'soft skills' (interpersonal, leadership skills, etc.).

In a report by the UK HE International Unit's (February 2016a) 'Go International' programme, the academic attainment and employment outcomes of mobile and non-mobile first degree UG students who completed their studies at the end of the 2013/14 academic year was compared. The data showed that, six months after graduating:

- Unemployment rates among mobile students were lower than those for non-mobile students across almost all socioeconomic backgrounds. Five per cent of mobile graduates were unemployed or due to start work six months after graduation compared to seven per cent of their non-mobile peers;
- A significantly lower proportion of graduates from disadvantaged backgrounds who were mobile were unemployed (five per cent) compared with those from the same backgrounds who were not mobile (6.2 per cent);
- Although they were less likely to be mobile, a period abroad is correlated with a greater improvement in employment outcomes for Black and Asian students compared to White students. 9.9 per cent of non-mobile Black graduates were unemployed, compared to 5.4 per cent of black mobile graduates. 9.5 per cent of Asian non-mobile graduates were unemployed, compared to 4.4 per cent of Asian mobile students. Additionally, mobile students were more likely to be engaged in further study, or in work and further study;
- Mobile students from almost all socio-economic backgrounds reported higher average salaries than their non-mobile equivalents. Graduates from a background in routine occupations who had been mobile earned, on average, £1,364 per year more than their non-mobile peers; and
- In terms of academic outcomes, a higher proportion of mobile students achieved a

first class or upper second class degree (81 per cent) compared with non-mobile students (72 per cent).

International: sector development

General facts and figures were produced by the UK HE International Unit (June 2016), the teaching and learning-related data included:

- With 416,693 students hosted in 2013, the UK was the second most popular destination in the world (after the USA, with 784,427) for international students;
- Whilst recent growth stagnated, the number of non-EU students in the UK increased by more than a third since 2007;
- Business and Administrative Studies and Engineering and Technology were the most popular subject areas for non-EU students (STEM subjects were particularly popular amongst Malaysian and Nigerian students; Business subjects for Chinese students; and Arts; Humanities and Languages for students from the USA); and
- Over half of the 22,000 UK students who spent a period of time abroad during their studies in 2014/15 went to other EU countries, largely in Subjects Allied to Medicine.

UK HE International Unit also published reports on the market position of international PGT (March 2016a) and international PGR (March 2016b) study. Whilst satisfaction was reported to be very high among international PGT and PGR students, the reports indicated that there were significant pressures from the USA and Canada, in particular. The reports were published three months before the UK EU membership referendum; pressure points highlighted in the reports included visa processing (especially for PGR students) and post-study work opportunities.

UK HE International Unit (February 2016b) highlighted both trends and policy in relation to UK HE providers and students from India. From 2010/11 to 2013/14 Indian student enrolment fell from 39,090 to 19,750. 79 per cent of 101 UK institutions, hosting substantial Indian student numbers, viewed the lack of post-study opportunities for Indian students as the most important challenge to engagement with India. Consistently, more than half the Indian students enrolled each year since 2007/08 have been on PGT courses and around 40 per cent of all students were enrolled onto Business and Administration courses, with Engineering, Computer Sciences and Subjects Allied to Medicine accounting for 15.2 per cent, 8.7 per cent and 6.9 per cent, respectively. At PGR level, Engineering was the most popular subject area.

International: TNE provision

HEGlobal (2016), a joint initiative of the International Unit and British Council, published findings from a survey to all UK HE providers delivering transnational education (TNE) in 2014/15; responses accounted for two-thirds of TNE students. The data showed that:

- The top five countries that UK TNE is delivered in have remained constant since 2012/13 (Malaysia, Singapore, Hong Kong, China and Oman). Over one quarter of TNE programmes are delivered for students in Asia, whilst the EU accounts for just under a quarter; Africa and the Middle East account for 14 per cent and 13 per cent respectively. There are only 15 countries in the world where the UK does not offer any HE TNE;
- The growth rate of TNE students between 2013/14 and 2014/15 is 13 per cent. Business and Management is the UK HE TNE subject delivered in most

countries (88 out of the 181 reported host countries). This is followed by Medicine (and related) programmes (in 66 countries), Arts and Humanities (in 65 countries) and Social Studies and Law (in 62 countries);

- Since 2012/13, the flexibility of offer in mode of delivery has increased; more programmes are now being offered as full-time, part-time, or both. Further, just over half of TNE programmes are distance/online in nature (most of which were first delivered before 2000), and around two out of five are delivered through a local delivery partnership. Branch campus is the most common form of physical presence in the host country and, where HE providers have a physical presence, most programmes are PGT;
- There is a small but growing mobility of students, particularly after 2010, between UK HE TNE host countries and the UK as part of TNE programmes
- Four in five HEIs intend to extend their TNE provision over the next three years; the main drivers being: (1) increasing student numbers; (2) increasing institutional reputation; and (3) increasing income; and
- Partnership approaches with host country partners are becoming more equitable. Whilst the UK partner usually leads on matters such as curriculum development, quality assurance and assessment, there is a more equitable arrangement in terms of teaching, staff development, academic and pastoral support.

Alternative providers

Alternative providers (APs) are HE providers that do not receive recurrent funding from HEFCE or other public bodies and are not FE colleges. In an 'experimental statistical first release', HESA (June 2016b) collected data from 63 out of an estimated 732 APs in 2014/15. There were 50,245 UG HE enrolments on designated courses at APs with a majority (47,665) enrolled on full-time designated courses. Of these a majority were either on first degree designated courses (48 per cent) or enrolled on HND/HNC designated courses (45 per cent). The majority (88 per cent) of these UG HE enrolments were UK domiciled. Business and Administration Studies accounted for the vast majority of UG AP student enrolments on designated courses in England.

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