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What Matters Most?

20 years of the student experience

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Dr Gosia Turner has nearly 20 years' experience in UK higher education. Gosia is a specialist in student surveys and social statistics. She began her career at the Higher Education Academy, contributing to the early development of the National Student Survey (NSS), the Postgraduate Research Experience Survey (PRES) and the Postgraduate Taught Experience Survey (PTES), before completing a PhD in Social Statistics at the University of Southampton. She later worked as a Senior Statistical Analyst at the University of Oxford and is now Head of Surveys at Jisc, where she leads the Graduate Outcomes survey.

Rose Stephenson is Director of Policy and Strategy at HEPI. Rose leads a high-profile programme of research, analysis and public engagement, shaping national debate on higher education. Her work focuses on strengthening the links between evidence, policymaking and practice. Rose also drives HEPI's strategic direction, setting priorities that position the Institute at the centre of national debate on higher education. Before joining HEPI, Rose held a series of transformational roles at the University of Bath, spanning student experience, policy development and programme delivery. She brings a strong understanding of how national policy decisions are implemented on the ground, and is a regular media commentator, speaker and chair on higher education reform.

Foreword

Cheryl Watson, Vice President
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As we reflect on over two decades of HEPI / Advance HE *Student Academic Experience Survey* (SAES) data, one thing is abundantly clear: the university experience is shaped less by who students are, and more by whether they feel supported, understood and empowered across their academic journey.

This report highlights the pivotal role that teaching quality, personalised support and the intelligent use of technology play in enabling students to thrive and feel they receive value for money.

High-quality teaching remains the cornerstone of student satisfaction. When staff are supported to engage with students meaningfully, provide clear guidance and offer timely feedback, students not only learn more effectively, but they also feel valued and motivated. Conversely, when academic staff are under pressure, students' perceptions of their educational experience and the value of their investment can be negatively affected.

Universities that prioritise staff development, reduce administrative burdens and leverage technology effectively can create conditions for staff to focus on personalised learning and student growth.

Technology has a particularly important role in supporting diverse student populations, including commuter students who may face additional time and travel constraints, as well as those balancing work, family or other responsibilities alongside their studies. For students working over 20 hours a week, maintaining attendance, engagement and a sense of belonging can be challenging. To address these challenges, systems must actively support connection, visibility and inclusion, while platforms that reduce duplication, confusion and unnecessary administrative tasks free up their limited

capacity and enable institutions to maintain engagement without making unrealistic assumptions about availability.

Digital platforms, accessible learning materials and robust IT support are essential tools that help students participate fully, study independently and receive the feedback and guidance they need to succeed. Survey findings emphasise that investment in these areas is a priority for students themselves, with many calling for better digital systems, course software and access to devices.

Student wellbeing is another critical factor influencing their perception of value for money. While general wellbeing measures are modest predictors, broader life satisfaction and a sense of purpose strongly correlate with positive academic experiences. Universities that embed wellbeing into their culture, provide targeted support and create an inclusive, connected environment enable students to feel both supported and motivated.

Ultimately, this report underscores a vital message for higher education: value for money is experienced, not calculated. It comes from the combination of high-quality teaching, meaningful support and accessible technology that empowers students to succeed. By keeping students' futures at the heart of planning and investment decisions, universities can ensure that all students leave not only with knowledge, but with confidence, purpose and ambition.

I hope you are inspired by the insights and the possibilities for shaping an educational experience that is not only effective but genuinely enriching for every student. Higher education has the tools, the talent and the technology to make that future a reality, and it all starts with thinking boldly about how we support students today.

Executive summary

The *Student Academic Experience Survey* (SAES) began over 20 years ago. It originally started in early 2006, in the spring before tuition fees were raised to a maximum of £3,000 in England and Northern Ireland, as a way of tracking students' changing expectations and perceptions.

The earliest Surveys were much shorter than those conducted in more recent years. Over time, some questions evolved, others were dropped and many new ones were added as interest grew in areas such as student wellbeing, sense of belonging and paid employment patterns. To examine student experiences over 20 years using SAES data, this report deliberately focuses on new angles of four core aspects that have been consistently measured in the Survey throughout this period.

These themes – perception of value for money, satisfaction with the academic experience, alignment between expectations and actual experience and attendance levels – were selected not only because they provide a stable and comparable evidence base over time, but also because they sit at the heart of the student experience, capturing fundamental aspects of engagement, perception and participation in higher education.

The COVID-19 pandemic caused significant disruption to higher education, especially during 2021, negatively affecting students' perception of value for money and their satisfaction with various aspects of their course. Unlike any other event in recent history, the pandemic upended traditional models of teaching, learning and campus life. Institutions were forced to shift overnight to remote delivery, and students faced unprecedented uncertainty, isolation and limitations on their educational experience. The scale and intensity of these challenges were extraordinary and clearly visible in the SAES data presented in this report.

Notably, however, students' experiences recovered relatively quickly after the pandemic. For example, first-year students in 2022 reported very similar levels of satisfaction with value for money on their course to those who started in 2020. There is some evidence that those who started their studies in the pandemic experienced negative effects throughout the remainder of their course.

One enduring consequence of the pandemic may be the shift in delivery methods and its subsequent effect on student attendance. Generally, course attendance has declined in recent years, with evidence indicating this trend may be associated with increased delivery flexibility and a rise in students undertaking employment during term time. The ability to access lectures online enables students to accommodate extended employment more easily, but whether this may be jeopardising their academic responsibilities remains less clear.

Teaching quality is the single most important driver in the student experience. Receiving good or very good value for money and a better than expected experience overall is inherently

linked to good teaching. The most important aspects for students are helpful and supportive staff, clear explanations of course expectations, good course organisation and useful and timely feedback. Students also recognise the importance of their own engagement and motivations to their academic success.

A strong sense of belonging and an inclusive campus are nearly as vital to students as teaching quality. These factors are closely linked to how students' perceive value for money, their satisfaction with courses and whether their experience surpasses expectations. This shows that a student's experience goes beyond course content: going to university is also about feeling part of a community. Additionally, face-to-face interactions with teachers and fellow students matter more to the overall student experience than online communication does.

Students' perceptions of value for money remain strongly tied to their learning experiences, teaching quality and sense of belonging, rather than the tuition fees they pay. However, the cost-of-living crisis and reduced disposable income have noticeably affected students' overall experience. There are some signs that university life has become more about work and less about education. The most recent Survey (2025) shows a slight drop in both perceived value for money and general satisfaction, which may point to the negative effects of financial stress in the higher education sector. This trend should be monitored in future iterations of the Survey.

Students' demographic characteristics, their personal circumstances and the subjects they study generally tend to be less important in shaping students' higher education experiences over and above anything already mentioned. The results of the Survey therefore suggest that student experience is shaped far more by what institutions do, than who their students are.

1.

20 years of student experience

Rose Stephenson, Director of Policy and Strategy, HEPI

Before considering the report itself, it is worth reviewing how the student body has changed over the past 20 years.

When the *Student Academic Experience Survey* was first published in 2006, tuition fees cost £1,000 a year and were paid upfront. Tuition fees were also means-tested, with some students paying less or nothing. In addition, maintenance grants made up a significant part of the student support offer for many students.

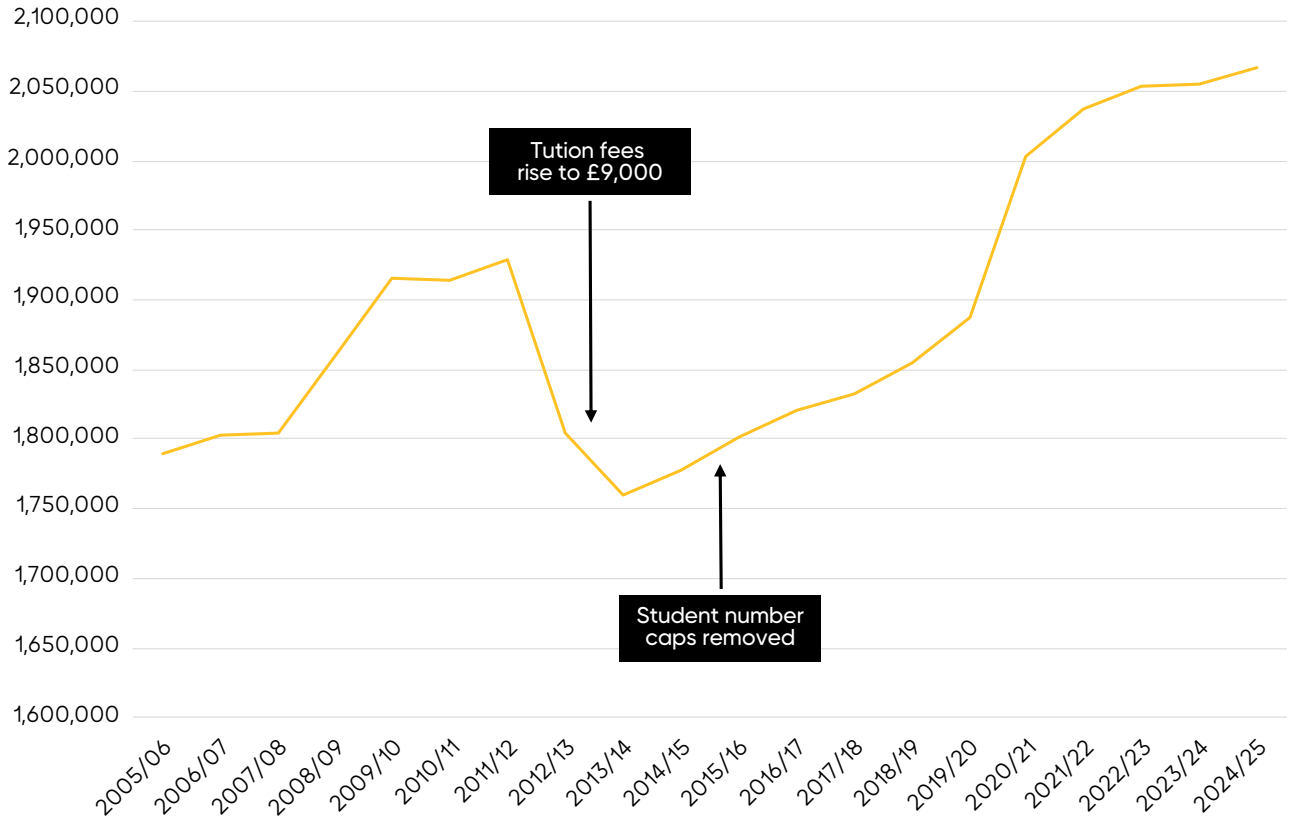
While there were no 'online lectures', the Open University (OU) had been delivering higher education via late-night lectures on the BBC. This 'televarsity' partnership had been running since 1971, with the last lecture broadcast in 2006. Distance learning was undergoing its own transformation, with OU course materials, including CDs and DVDs, sent to students by post.

On campus, queues formed in university libraries to borrow the limited number of available textbooks rather than access them online, and end-of-year exam results were regularly posted on department notice boards. iPods were the height of technology and laptops were seen as a luxury rather than a necessity, with many students accessing computer rooms to write their essays. Mobile phones were widespread, although functionality was mainly limited to calls and texts. Social media was conducted on computers and students were most likely to be using Bebo or MySpace.

In addition to social and technological changes, the student body has undergone significant changes over the past two decades. The number of undergraduate students studying in the UK has grown significantly. In 2005/06, there were fewer than 1,800,000 undergraduate students. In 2024/25 there were just over 2,066,000 undergraduate students. This has been driven, in part, by the removal of student number caps.

On 5 December 2013, the Chancellor of the Exchequer, George Osborne, announced the cap on the number of UK and EU-domiciled undergraduates English higher education institutions may recruit would be relaxed in 2014/15 and abolished in 2015/16. As a consequence, the limit on the total number of undergraduate students would disappear.[2]

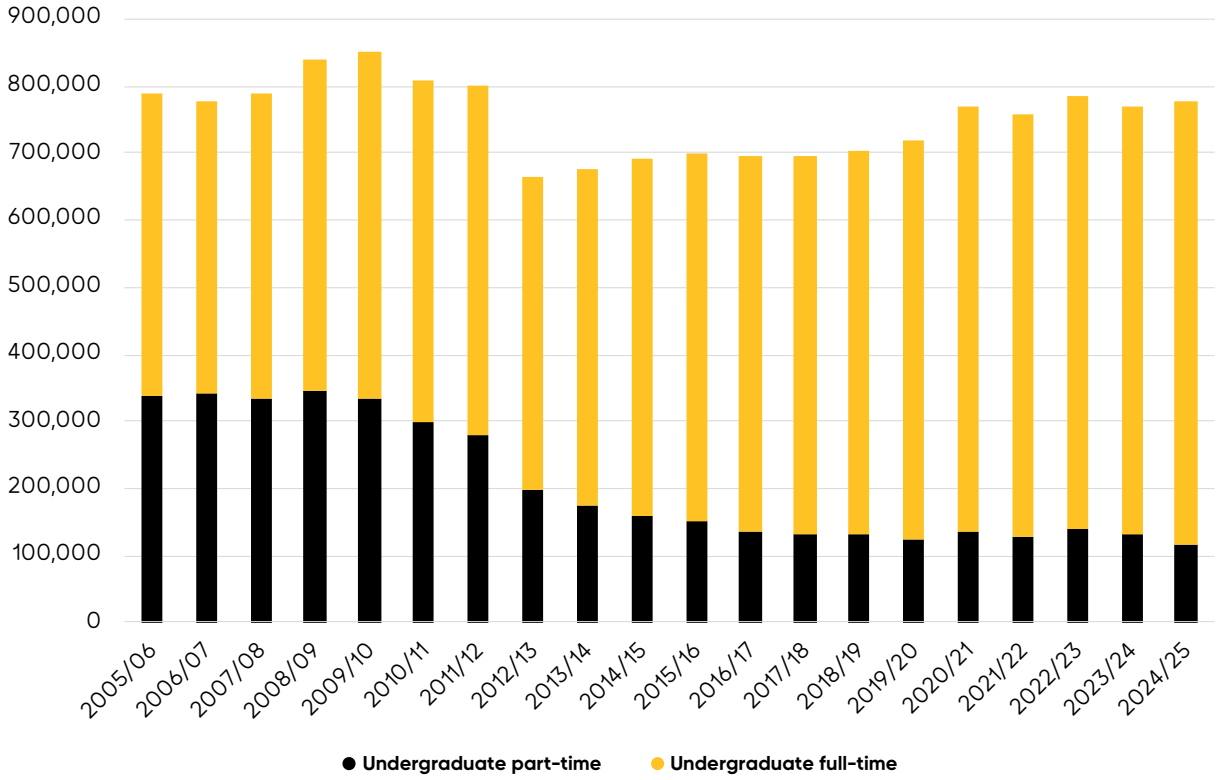
Figure 1.1 Number of undergraduate students enrolled in the UK



Source: HESA[3]

The makeup of full- and part-time students has also changed significantly. In 2005/06, the number of full-time undergraduate entrants was 450,485 and the number of part-time undergraduate entrants was 337,240. That meant some 43% of undergraduate entrants were to study part-time. In 2024/25 only 15% of undergraduate entrants were part-time.

Figure 1.2 Student entrants by mode of study (full- or part-time)

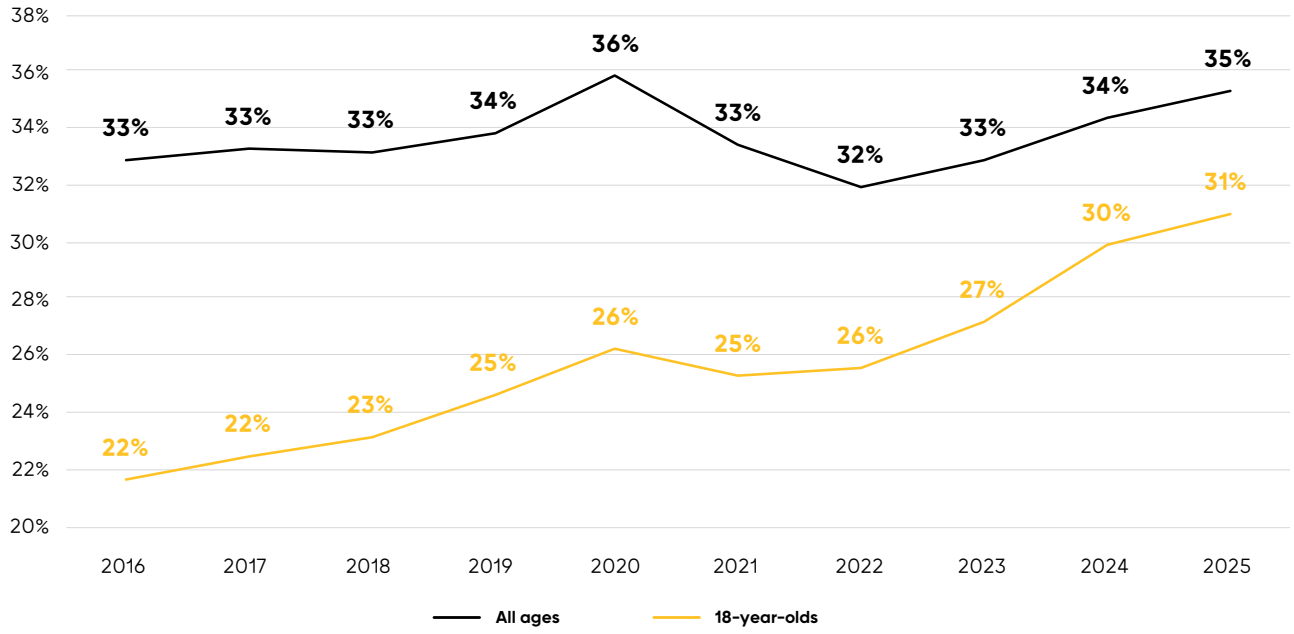


Source: HESA[4]

In the last decade, from 2016 to 2025, there has been a small rise in students of all ages indicating their intention to live at home while they study (from 33% in 2016 to 35% in 2025). However, there has been a much more significant rise among 18-year-olds. This group rose from 22% staying at home in 2016 to 31% in 2025. Similar trends are reflected in the HEPI / Advance HE *Student Academic Experience Survey* data and are discussed in section 6 of this report.

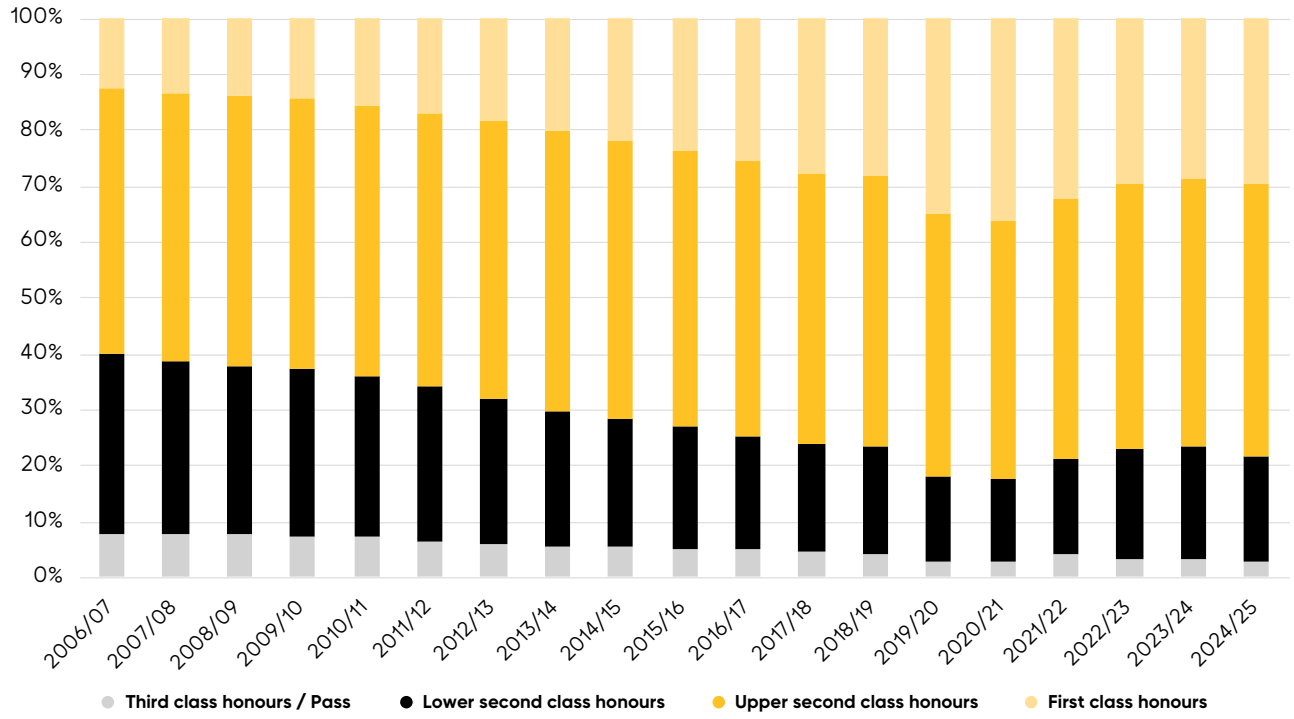
Student outcomes have also changed over time. In 2006/07, 12.6% of undergraduates achieved a first-class degree; by 2024/25, 29.7% did.

Figure 1.3 Applicant intention to live at home



Source: UCAS[5]

Figure 1.4 Classified first degree qualifications by class



Source: HESA[6]

The *Student Academic Experience Survey* was first published in 2006, under its original title *The Academic Experience of Students*. The brainchild of Bahram Bekhradnia, HEPI's then Director and now President, the Survey aimed to ask a large and representative number of students questions on a range of issues, including the amount of contact they have with staff and the hours they devote to private study.

Bahram Bekhradnia, President of HEPI, and founding author of the Survey, reflects:

For me, one of the most interesting findings was how little study students did – especially compared to students overseas. Some of the most senior in the sector, of course, hated that and first accused us of taking no account of private study, then said it was not the amount but the quality of study / teaching, and finally resorted to English exceptionalism (we teach better, so students learn more, more quickly!).

The early Surveys were part-funded by a grant from the Higher Education Academy (HEA). Developing the report then evolved into a partnership model, firstly with Which? in 2013 and then with Advance HE (previously the Higher Education Academy), which brought a particular focus on teaching quality, now central to the Survey. Special mention must go to Jonathan Neves of Advance HE, who has co-authored 10 of the 16 reports over the last 20 years.

The longevity of the Survey has allowed for a significant and valuable time series. Over this time, tuition fees have moved from an up-front fee of £1,000 to a loan-based fee of £9,535 (in England and Wales). Perhaps, unsurprisingly, as fees have risen, students' perception of the 'value for money' they receive has reduced.

The Survey has also adapted with the student body, with questions being added to understand topical issues. For example, four Office for National Statistics (ONS) wellbeing questions were added in 2014, and questions relating to free speech, paid employment and online learning have also been added.

Monitoring the student experience during the unprecedented disruption of COVID-19 was valuable for understanding the challenges faced by students and institutions and demonstrated the value of such a long-term time series.

In more recent years, the Survey has clearly demonstrated a significant shift in the student experience, with the majority of students now in paid employment during term time, and many students working long hours in employment alongside their studies.

This evidence has led to institutional change, with higher education providers compressing their on-campus timetables to allow students more flexibility to engage in part-time work, as well as increasing and improving their on-campus work offer. This finding in particular seems to have a direct impact on government policy, with the Secretary of State for Education, the Rt Hon Bridget Phillipson MP, announcing at the Labour Party Conference in 2025 that targeted maintenance grants would be reintroduced with the statement:

So that is why today I'm announcing that this Labour Government will introduce new targeted maintenance grants for students who need them most. Conference, their time at college or university should be spent learning or training. Not working every hour God sends.[7]

The underlying data have been published alongside the Survey to allow for other researchers and policy wonks to find novel angles. This has resulted in a number of 'spin-off' reports, including: *How different is Oxbridge?*, *Living and Learning in London: What the HEPI / Advance HE Student Academic Experience Survey tell us about life in the capital*, and *One for all or all four one?*, which asked if the UK still had

one higher education system.[8] The merged dataset used in this report, and explained in the methodology, is available in Excel and SPSS formats for other researchers' analysis. This dataset, along with technical notes and a mapping document outlining which questions were asked and when can be obtained from HEPI. Please note that higher education provider names have been removed from the dataset and are not used in these analyses.

These trends, findings and spin-out reports underline just how much the higher education sector has changed over the past two decades, and why a consistent longitudinal lens that focuses on the student academic experience is so valuable. The growth of the student population, the decline in part-time study, rising degree classifications, changing funding models and the increasing financial pressures on students have all fundamentally reshaped what it means to be an undergraduate in the UK. As the sector continues to evolve – and faces new technological, economic and political challenges – this long-term evidence base will remain essential for informing debate and decision making and ensuring that the student voice remains central to the future of higher education.

2. Methodology

The first *Student Academic Experience Survey* (SAES) was launched in 2006, including first- and second-year undergraduate students in English universities only. In 2012, the SAES was expanded to include third- and fourth-year undergraduate students across all UK universities. There were no surveys administered in 2008, 2010 and 2011. The 2009 SAES was much smaller in scope and had a limited number of respondents. As there was very little overlap between the 2009 Survey and other iterations, results from this Survey are not included here.

This report is not based on any newly commissioned data. Instead, it collates all the Surveys conducted since 2006 and subjects the numbers to new in-depth analysis. The analytical dataset used in this report contains 206,512 responses from students.

Data linking

A great deal of care was taken to link existing datasets, but it is important to note that such a combined dataset is subject to several caveats.

Over the past 20 years, HESA has introduced changes to the officially used academic subject classification. This transition led to inconsistencies in subject variables across different Survey waves. For instance, Engineering and Technology were combined in some years but listed separately in others. To address these discrepancies, this report aggregates subjects at a higher level, as outlined in Table 1.

Table 1 Subject mapping in the merged SAES dataset

Business and Administration	Business & Administrative Studies
Creative Arts and Design	Creative Arts and Design
Humanities and Social Sciences	Architecture, Building & Planning; Social Studies; Mass Communications & documentation, Linguistics, Classics & related subjects; European Languages, Literature & related subjects; Eastern, Asiatic, African, American & Australasian languages, literature & related subjects; Historical & Philosophical Studies; Education
Law	Law
Life sciences	Biological Sciences; Veterinary Sciences, Agriculture & related subjects
Medicine and Dentistry	Medicine & Dentistry; Subjects allied to medicine
STEM	Physical Sciences, Mathematics, Engineering; Technologies
Other	Combined / general subject unspecified

There are three questions that were asked in every wave of the Survey using the same 5-point Likert scale of agreement. However, in early waves (2006 to 2012) the scale used was coded in reverse to later years. As part of data cleaning, these were reversed to match the format used in subsequent years. Because the wording of the questions remained the same, as well as categories used for responses, these are deemed comparable and can be analysed together.

Some of the values entered in questions asking about scheduled and attended hours were identified as outliers. Any scheduled hours entered as 0 were removed. Any values reported in these two questions that were above 50 were also removed. This accounts for 1.3% of all responses to these two questions.

Sample and weighting

The analyses in this report use weighted data, using weights developed for each Survey wave. For more information about Survey weights please refer to the relevant annual SAES. Information on Survey sample composition and representativeness is also available from individual annual reports.

Like other SAES reports, analyses in this report use sex rather than gender. Differences by ethnicity are shown separately for UK and non-UK students. The fee-status variable is used to distinguish between these two groups.

Statistical methods used

The strength of this report lies in two main areas. First, it looks at SAES data collected over a period of 20 years, giving a broad and comprehensive view. Secondly, it uses more advanced methods of analysis than have been used in the past.

Previously, the data were mainly analysed by comparing two factors at any one time. For example, differences in perceptions of value for money might be looked at separately for males and females, home and international students or students with and without a disability. Analyses in this report go further by using methods that allow multiple factors to be considered at the same time. One of the main approaches used is logistic regression modelling. In simple terms, this type of analysis looks at how different factors – such as students' demographic characteristics, circumstances and Survey responses – relate to a single outcome. In this case, the outcome is something with two possible answers, such as whether a student feels they receive good value for money from their course (yes or no).

The analyses estimate how likely a student is to report good value for money and show how this likelihood changes depending on different factors. For example, students who are happy with their teaching, satisfied with access to teaching staff outside scheduled hours and feel they belong at university may be more likely to feel they are getting good value than those who are not.

This type of analysis helps to understand three things: whether a relationship exists between factors; how strong that relationship is; and which factors matter most. This report focuses mainly on understanding how strong these relationships are and which factors are the most important.

Real life is extremely complicated, and no statistical model can ever fully explain any social phenomenon. As a general guideline in the social sciences, logistic regression models that explain up to 5% of the probability in an outcome are considered to demonstrate a very weak relationship between the outcome and the explanatory variables. Even if statistically significant, such effects may have limited practical importance. Values between 5% and 10% are typically regarded as weak, while those between 10% and 20% are considered moderate and likely meaningful in explaining the outcome. Models explaining more than 20% of the probability are viewed as demonstrating strong effects, and those exceeding 40% are considered very strong – although such levels are rare in social science research.

Importantly, this approach also helps identify which factors are most influential when everything is considered together. It can show that some differences that appear important at first are, in fact, explained by other factors. For example, differences in graduate earnings between men and women may be largely explained by the subject they studied, rather than sex itself.

Subject impact

Analyses presented in this report indicate that broad subject area is generally a weak predictor of student experience. This may be attributed to the fact that the student experience is closely related to the specific subject studied. For instance, Medicine and Dentistry students typically have more scheduled contact hours than Humanities students. However, both groups express comparable levels of satisfaction with their contact time, as each receives an amount appropriate for their respective disciplines. Nonetheless, several notable trends within broad academic fields are observed and discussed in detail in the main body of the report.

Demographic characteristics and students' circumstances

Over time, the HEPI / Advance HE *Student Academic Experience Survey* has incorporated additional questions regarding students' characteristics and personal circumstances. To accurately evaluate the combined influence of these characteristics on the dependent variable in the regression model, it is essential that all respondents have the same full set of data available for analysis. Consequently, certain logistic regression analyses presented in this report include only students surveyed between 2023 and 2025.

The characteristics examined are international fee status, disability status, ethnicity, sex, experience of a close

family member in higher education, sexual orientation, trans history, caring responsibilities, estrangement from parents, care experience, term-time accommodation and term-time employment. In the report these are referred to as a suite of demographic and circumstances variables. Students' sense of belonging, experience of an inclusive campus and wellbeing scores were analysed in a separate regression model because this data was available between 2022 and 2025.

It may be surprising to see that throughout the analyses shown in this report, demographic characteristics and students' circumstances have little impact on students' experience as measured in a regression model. This is, in fact, a common result in social sciences. There are number of reasons behind this. First, factors like quality of teaching, course organisation or support services usually have a more direct impact on student perceptions of value for money than sex or disability alone. If teaching is poor, it is likely to impact all students in a similar way regardless of their sex.

Secondly, there generally tends to be a significant variation among students within the same group. International students, for example, may report lower satisfaction with how their course is delivered, which could be linked to their level of English language proficiency. While some international students have excellent English skills, others may not. As a result, being an international student is only a weak indicator of course satisfaction, as it merely points to another, more important variable – English language proficiency.

Thirdly, these traits are generally broad and unchanging. A student's own perspective shapes their experience more than their circumstances. Disability affects each student differently; two students with the same disability may view their circumstances in contrasting ways, one sees it as a barrier, while the other is undeterred.

The report shows that a sense of belonging and student wellbeing are strong predictors of course experience, as these subjective factors closely relate to daily student life. Simply put, happy students typically have better experiences than unhappy ones, regardless of other factors.

3.

Perception of value for money

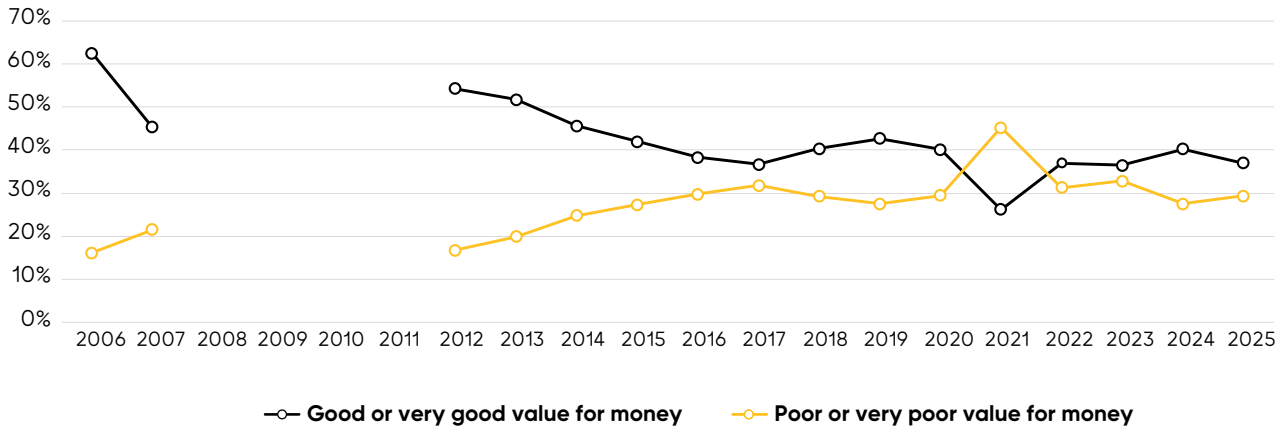
Thinking of all the things you've been asked about in this questionnaire so far, which statement best describes your view of the value for money of your present course?

Students could choose from the following response options: I have received very good value for money, I have received good value for money, I have received neither poor nor good value for money, I have received poor value for money, I have received very poor value for money. Most analyses in this section focus on the percentage of students who said they received good or very good value for money, rather than those who were neutral or reported poor value.

As illustrated in Figure 3.1, perceived good value for money among students dropped between 2006 and 2007, potentially owing to the tripling of the fees in 2006. It has also shown a consistent decline since 2012, coinciding with the introduction of the £9,000 tuition fee cap for full-time undergraduate courses in England. This downward trend intensified in 2021 during the COVID-19 pandemic, with a marked drop in positive perceptions. Since 2021, perceived good value for money has gradually increased, returning in 2025 to levels comparable to those observed prior to the pandemic. In 2025, 37% of all respondents reported receiving good or very good value for money from their course.

It is important to note that the questionnaire has expanded over the years, which may have affected students' interpretation of this question. For instance, mental health support may have become a significant component of perceived value for money in recent years, compared to a decade ago. Other factors that may have influenced perceived value for money may be the cost-of-living crisis, improved access to online resources and evolving expectations regarding employability outcomes.

Figure 3.1 Perception of value for money, 2006 to 2025



Value for money by teaching and teaching staff characteristics

There is a question in the Survey that reads:

Thinking about all the teaching (including in-person and virtual online teaching) you have experienced this year, what proportion of teaching staff did the following:

Motivated you to do your best work, were helpful and supportive, clearly explained course goals and requirements, helped you to explore your own areas of interest, were poor at explaining things, used lectures / teaching groups to guide and support independent study, taught in an unstructured and disorganised way, encouraged you to take responsibility for your own learning, regularly initiated debates and discussions.

Students could choose All, Majority, Half and half, Minority, or None for each option.

To assess how these teaching staff traits / activities impact students' perception of value for money on their course, a variable was created that combined 'All / Majority' as opposed to 'Half and half, Minority and None'. As Figure 3.2 shows, students who reported that All or Majority of their teaching staff exhibit a positive action (for example, were helpful and supportive) were much more likely to report their course offering good or very good value for money. Similarly, students who reported All or Majority of their teaching staff doing something negative (for example, poor at explaining things), were much less likely to perceive value for money on their course as good or very good.

Figure 3.2 Proportion of students reporting good or very good value for money by teaching staff activities, 2015 to 2023[9]

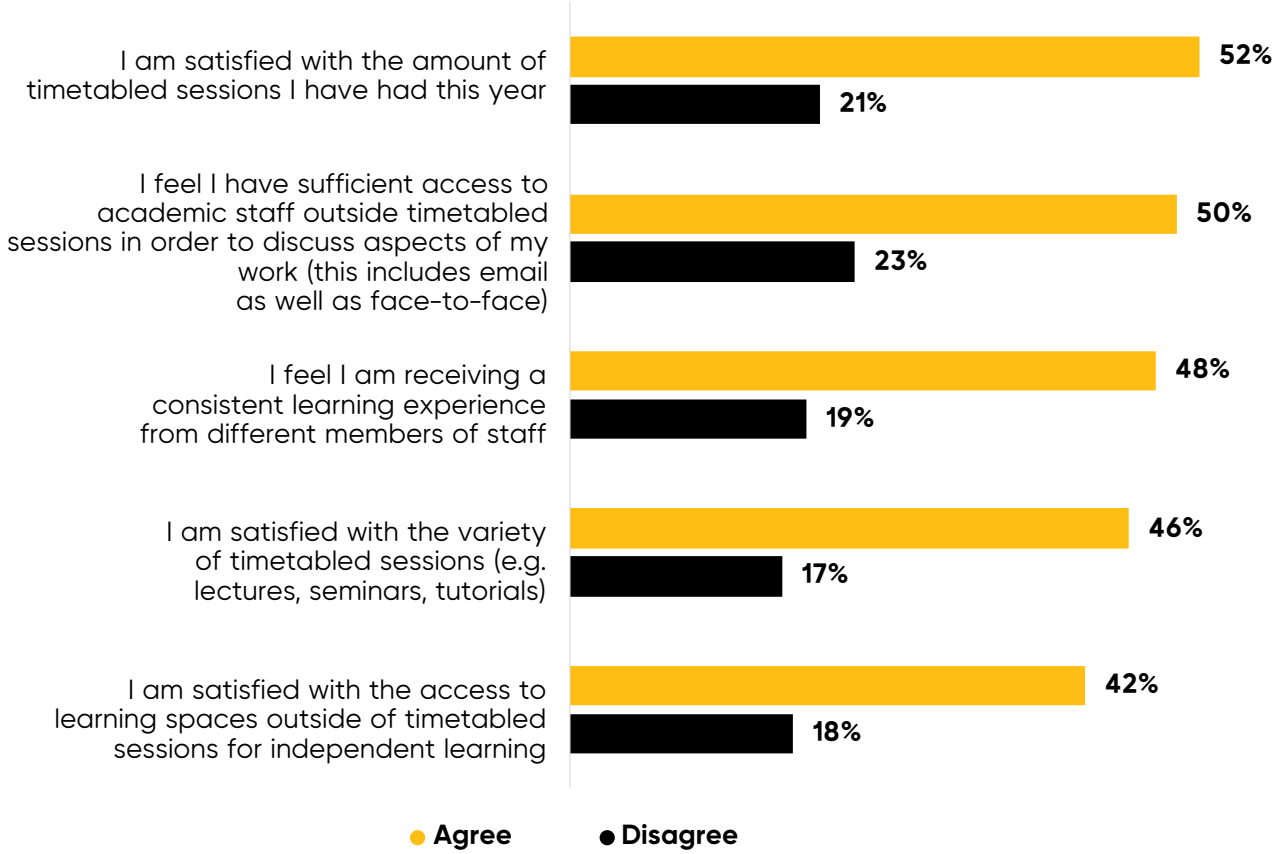
The logistic regression analyses suggest all these activities taken together explain up to 15% of the probability of reporting good value for money. This is considered a medium effect. Regression analyses also help to assess which teaching staff activities are relatively the most important. These were staff who: are helpful and supportive, motivate students to do their best work and clearly explain course goals and requirements. As each option in this question covers a slightly different aspect of teaching staff behaviour, even when analysed together in a regression model they all remain statistically significant. This means all aspects are important and their effects do not cancel each other out.

Students were also asked to what extent they agree with several statements regarding their satisfaction with various aspects of their teaching experience. For example:

I am satisfied with the access to learning spaces outside of timetabled sessions for independent learning.[10]

Figure 3.3 shows those who Agree or Strongly agree and those who Disagree or Strongly disagree with these statements and the proportion stating that their course offers good or very good value for money.

Figure 3.3 Proportion of students reporting good or very good value for money by satisfaction with different aspects of their teaching experience, 2022 to 2024



More than half (52%) of students who are satisfied with the number of timetabled sessions feel their course is good or very good value for money. In contrast, only 21% of those who are not satisfied believe their course offers good value. This indicates a strong link between students' views on core teaching experiences and their perception of value for money.

Logistic regression analyses confirm these findings, showing these factors are good predictors of perceived value for money and account for up to 17% of the likelihood that students will report good value – considered a medium effect. The most significant aspects were having a consistent learning experience and an adequate amount and variety of scheduled sessions.

Students were also asked about certain aspects of receiving feedback from their teaching staff. The question was worded:

Thinking about all the teaching you have experienced this academic year (including in-person and virtual online teaching), what proportion of teaching staff did the following: gave you useful

feedback, were open to having further discussions about your work, gave you feedback in time to help you with the next assignment, gave you more general feedback on your progress, gave you feedback on draft work.

Again, those who said that All or Majority of staff provided them with any form of feedback were more likely to report good or very good value for money than their counterparts. According to the logistic regression analysis, feedback items explain between 8% and 10% of the probability of reporting good value for money. This relationship is still medium in strength but not as strong as the previously mentioned aspects of teaching. Relatively, the most important feedback items were giving useful feedback, being open to having further discussion about work and timely feedback to help with the next assignment.

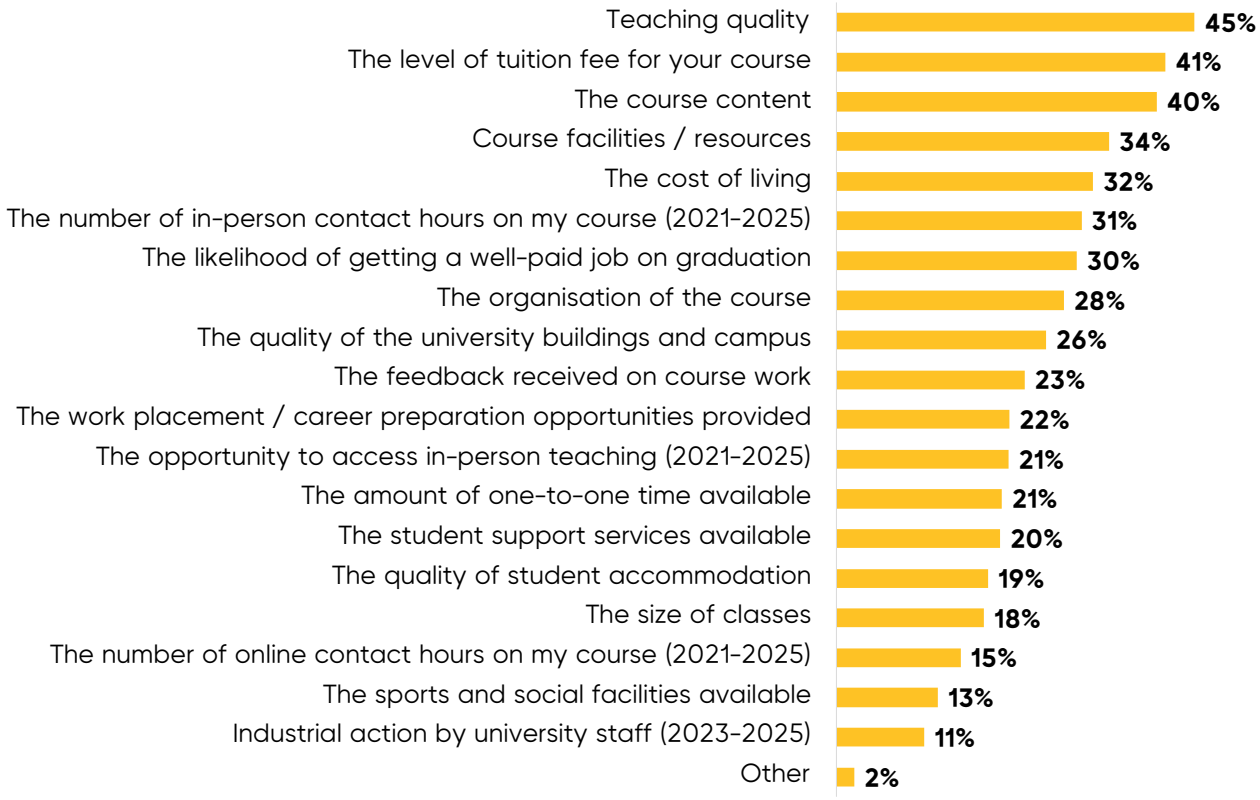
Overall, the results in this section suggest that the core aspects of the teaching experience, such as helpful and available teaching staff, amount of contact time, provision of study spaces and helpful feedback on students' work are strongly and positively correlated with students' perception of the value for money their course offers.

Different aspects of value for money

The patterns observed in the previous section are confirmed by the question asking students what aspects of their higher education experience they were thinking of when answering the value-for-money question. Students were asked:

When giving your answer to the previous question on value for money, were you thinking primarily about...

Figure 3.4 Aspects of the course and teaching experience students thought about when answering the value for money question, 2018 to 2025



As can be seen in Figure 3.4, the items most frequently mentioned closely relate to the course itself: teaching quality, course content, the number of in-person hours and so on. The logistic regression analysis of these various aspects of value for money show they are highly correlated and explain between 20% and 28% of the probability of reporting good value for money. It should be noted that certain aspects are positively correlated, while others are negatively correlated, with the perception of value for money (Figure 3.5).

Figure 3.5 Aspects of value for money that are positively and negatively correlated with the probability of reporting good or very good value for money offered by the course, in order of relative importance

Quality of university buildings / campus

Course content

Course facilities / resources

Likelihood of getting a well-paid job

Teaching quality

Student services support

Size of classes

Sports facilities

Level of tuition fee

Cost of living

The amount of one-on-one time available

Number of in-person hours

Industrial action by university staff

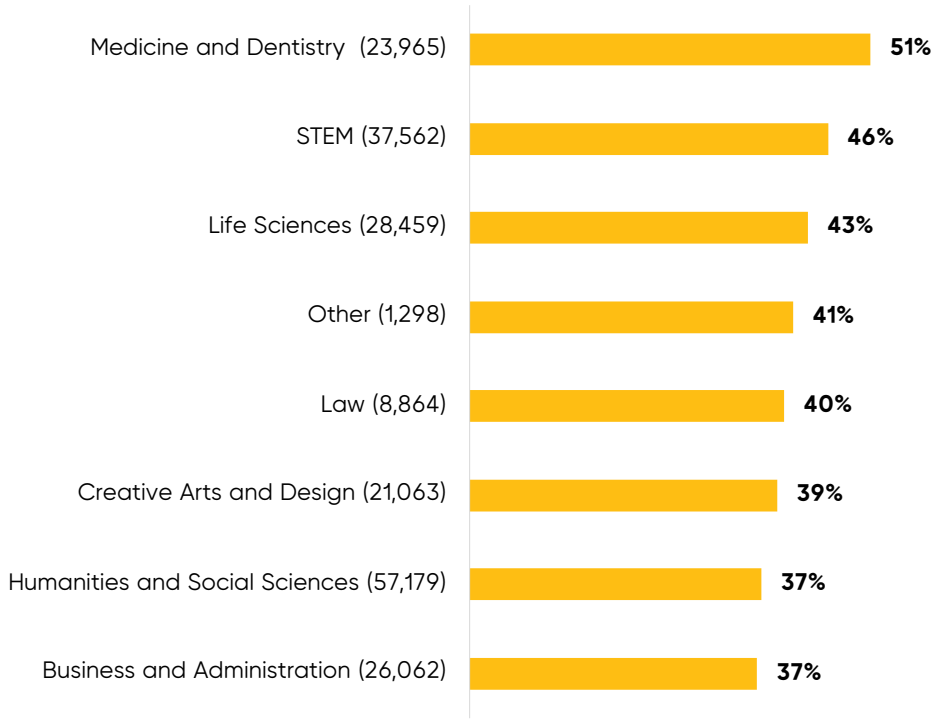
Feedback received on the course

Students were more likely to report that their course offered good or very good value for money when they were thinking of the quality of university buildings, course content, course facilities / resources or a likelihood of getting a well-paid job. Students were less likely to report good or very good value for money on their course when they were thinking of the level of tuition fees, the cost of living or the amount of contact time.

Perception of value for money by subject

There are some statistically significant differences between broad subject groups. Those studying Business and Administration are generally the least likely to agree they have received good value for money, while Medicine students tend to agree the most with the statement that their course offers good or very good value for money (Figure 3.6).

Figure 3.6 Proportion of students reporting good and very good value for money their course offers by broad subject group, 2006 to 2025



Most subject areas, though not all are shown here for brevity, demonstrate a consistent trend in students' perceptions of value for money, as depicted in Figure 3.1. This pattern includes a noticeable decline in 2021, corresponding with the pandemic, followed by a substantial recovery in 2022. However, there are two significant deviations from this trend.

Among Business and Administration students, perceptions of receiving good or very good value for money increased markedly after the pandemic, as shown in Figure 3.7. In contrast, for Medicine and Dentistry students, their sense of value for money remains subdued and is yet to recover to pre-pandemic levels, as illustrated in Figure 3.8.

Figure 3.7 Proportion of Business and Administration students reporting good and very good value for money for their course, 2006 to 2025

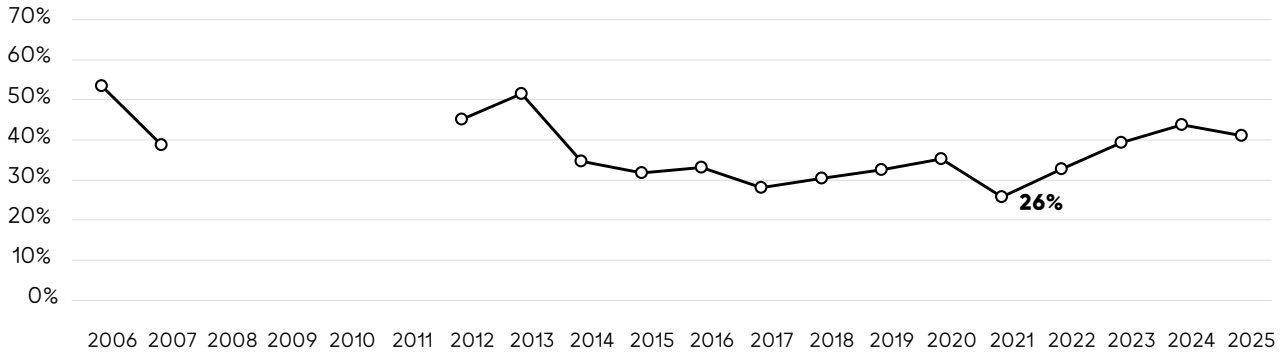
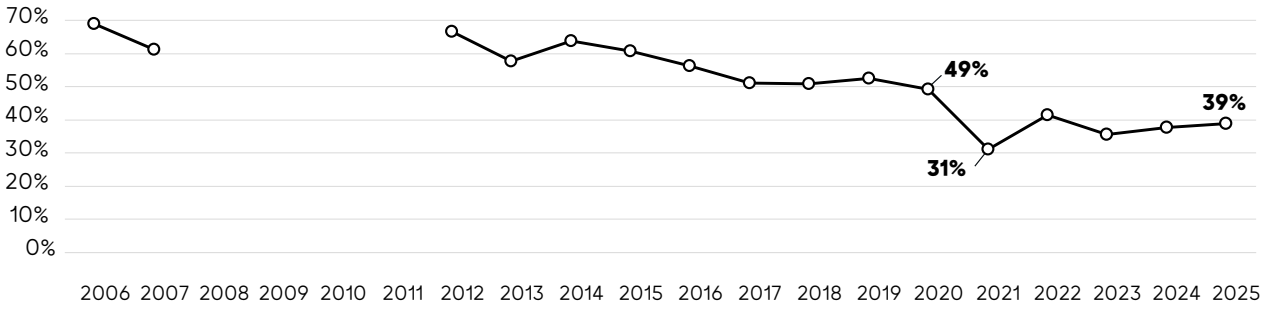


Figure 3.8 Proportion of Medicine and Dentistry students reporting good and very good value for money their course offers, 2006 to 2025



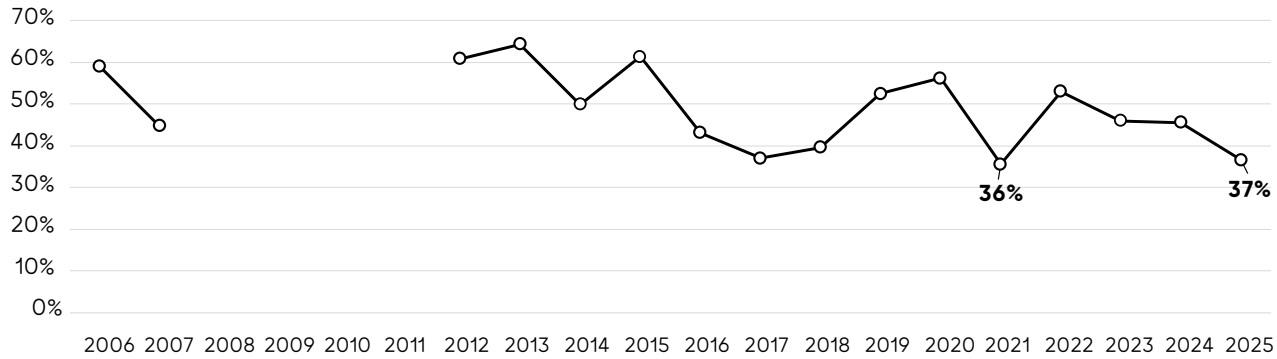
Value for money by institution type

Figure 3.9 indicates that students at specialist providers are most likely to feel they receive good or very good value for money, with Russell Group students coming next. Yet Figure 3.10 reveals that this positive rating largely stems from higher scores in earlier Survey waves.

Even though there was a strong return after the pandemic, perceptions of value for money at specialist providers have continued to decline since 2022. This trend might be linked to the cost-of-living crisis and the comparatively high cost of running specialist programmes at mostly small institutions.

Figure 3.9 Proportion of students reporting good and very good value for money their course offers by higher education institution type, 2006 to 2025[12]

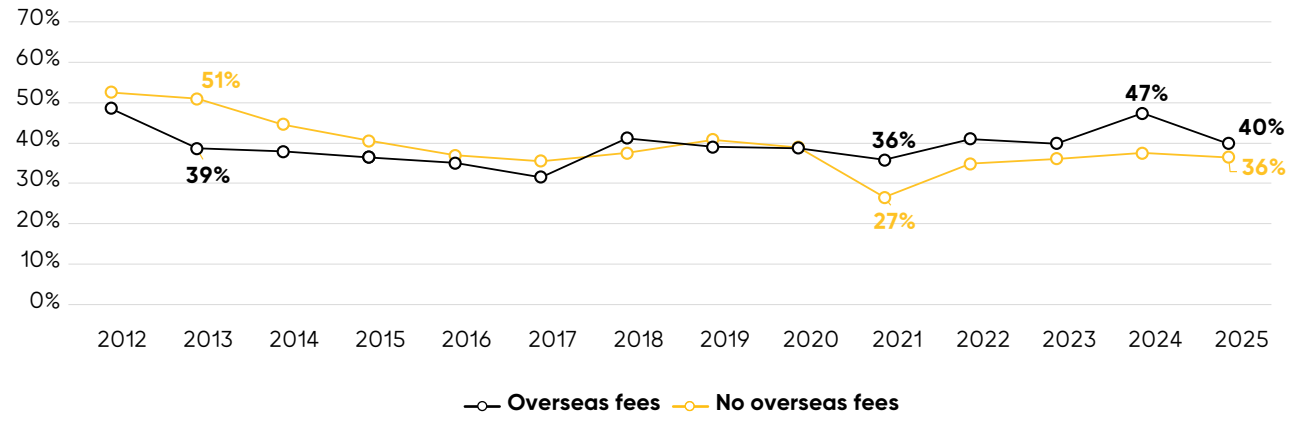
Figure 3.10 Proportion of students in specialist institutions reporting good and very good value for money their course offers, 2006 to 2025



Value for money by students' characteristics

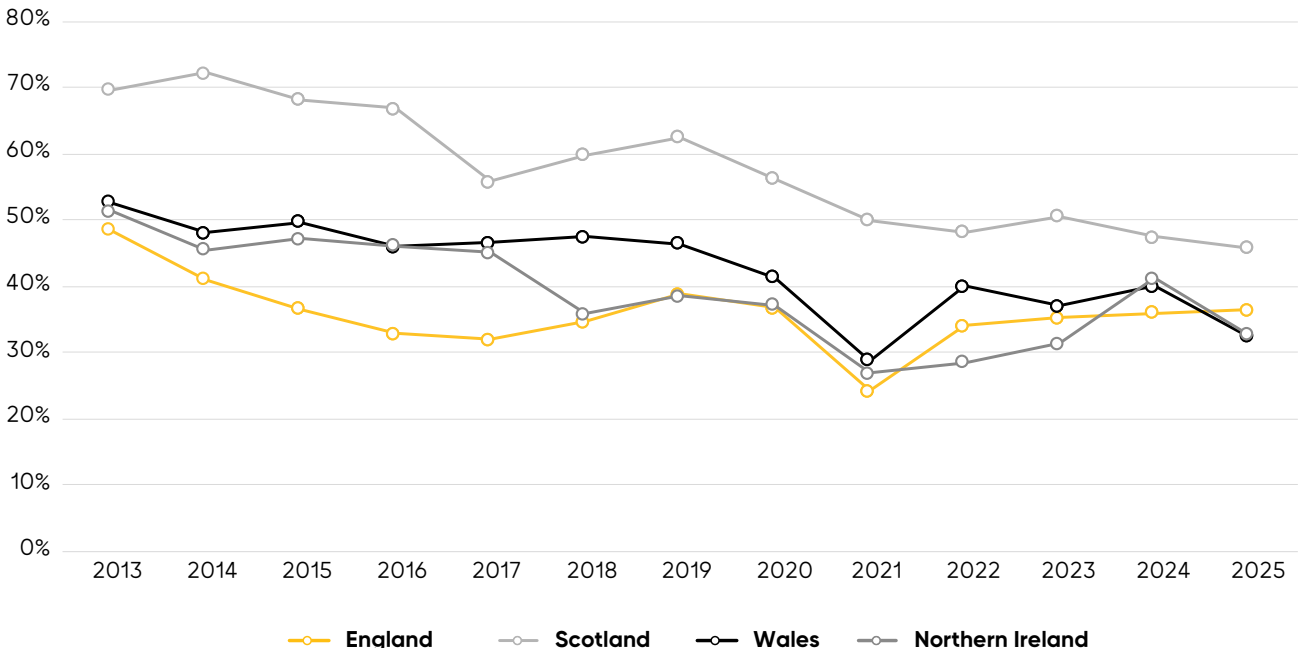
There are some noteworthy differences in perception of value for money between certain groups of students. Early SAES reports showed international students were less likely to state their course offered good or very good value for money compared to their UK-domiciled counterparts. Recently, this trend has reversed (see Figure 3.11).

Figure 3.11 Proportion of students reporting good and very good value for money their course offers by fee status, 2012 to 2025



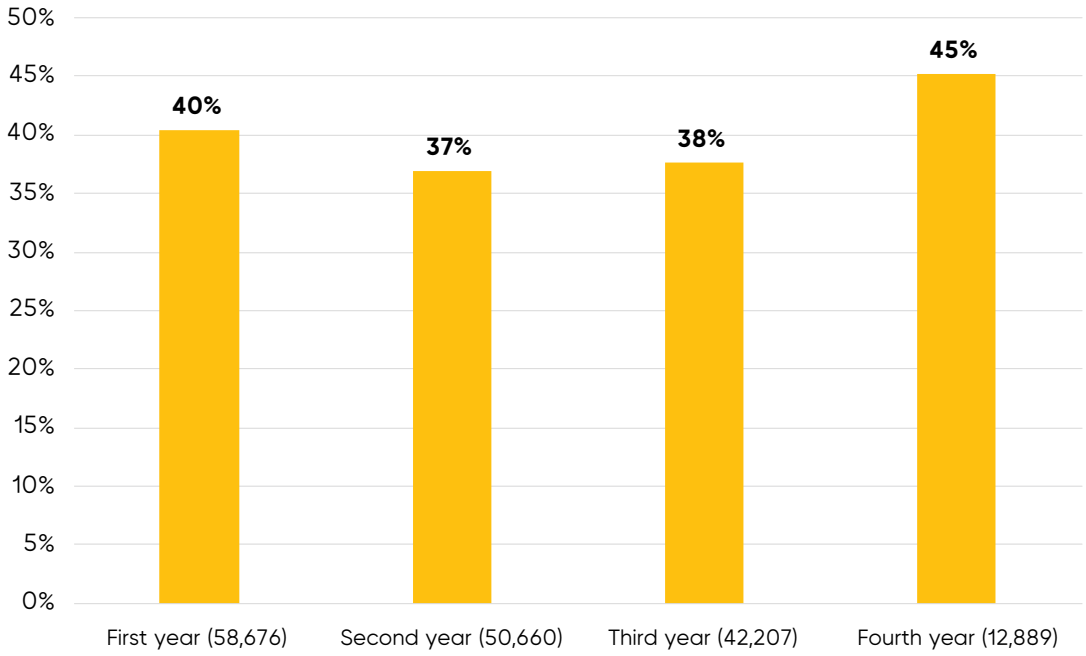
As highlighted in previous HEPI / Advance HE *Student Academic Experience Survey* reports, students' UK home region is associated with differences in perceived value for money.[13] Figure 3.12 indicates that students from Scotland consistently report good or very good value for money at higher rates than those from elsewhere in the UK. While the decline in 2021 is smaller for Scottish students, there is no subsequent bounce back relative to other UK nations. The modest reduction between 2024 and 2025 in reporting good or very good value for money appears among students from Wales and Northern Ireland, with little comparable change in England or Scotland.

Figure 3.12 Proportion of students reporting good and very good value for money their course offers by their home region, 2013 to 2025



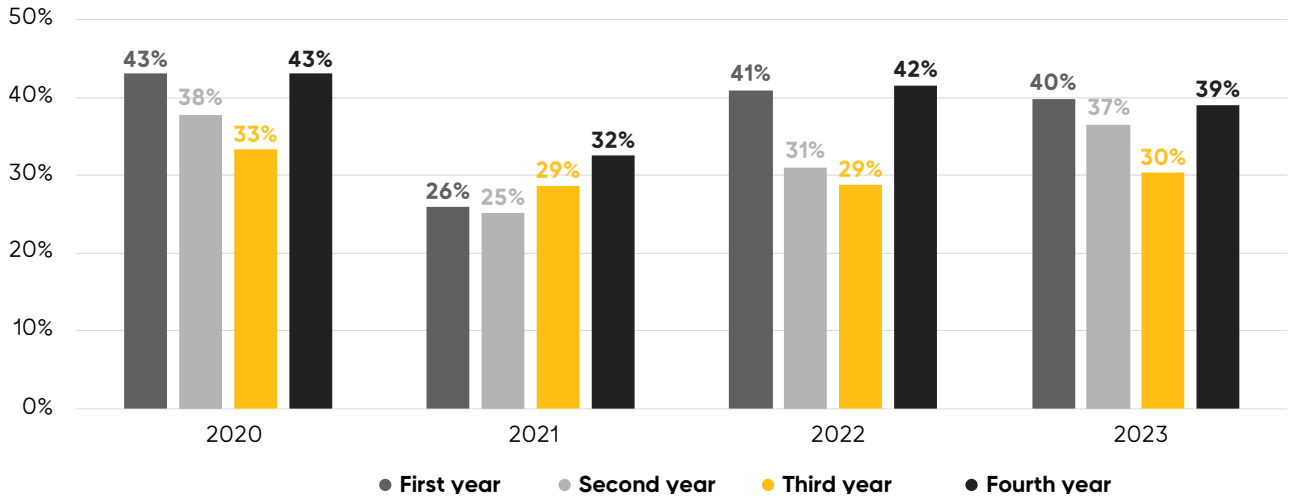
Initially, the SAES reports only included students in their first or second year. However, from 2013 onwards, students in later years were also surveyed. Between 2013 and 2025, 90% of those surveyed by SAES were enrolled on three- or four-year courses. Most respondents were in their first, second or third year, with only 8% in their fourth year. Figure 3.13 shows that 40% of first-year students rated their course as offering good or very good value for money, but this percentage drops in the second and third year. Notably, fourth-year students are most likely to say their course offers good or very good value for money, at 45%.

Figure 3.13 Proportion of students reporting good and very good value for money their course offers by course year, 2013 to 2025



As noted previously, the pandemic adversely affected students' perceptions of good value for money. It is plausible to expect that students at varying academic stages experienced this impact differently. Figure 3.14 illustrates the potential effects of the pandemic between 2020 and 2023.

Figure 3.14 Proportion of students reporting good and very good value for money by year of study and SAES wave, 2020 to 2023



Note: these are not the same students tracked over time; however, second-year students in 2022 experienced the pandemic in 2021 as first-year students.

It is evident that in 2020, first- and fourth-year students were more likely to describe their courses as offering good or very good value for money than students in their second and third years. However, this trend was disrupted in 2021 during the pandemic. All student groups were less likely to report good value for money, with especially low scores among first- and second-year students. In 2022, first-year students once again reported good or very good value for money at rates similar to those in 2020, but second- and third-year students continued to lag behind. By 2023, the pattern had largely returned to that seen before the pandemic, although third-year students remained the least likely to report good or very good value for money.

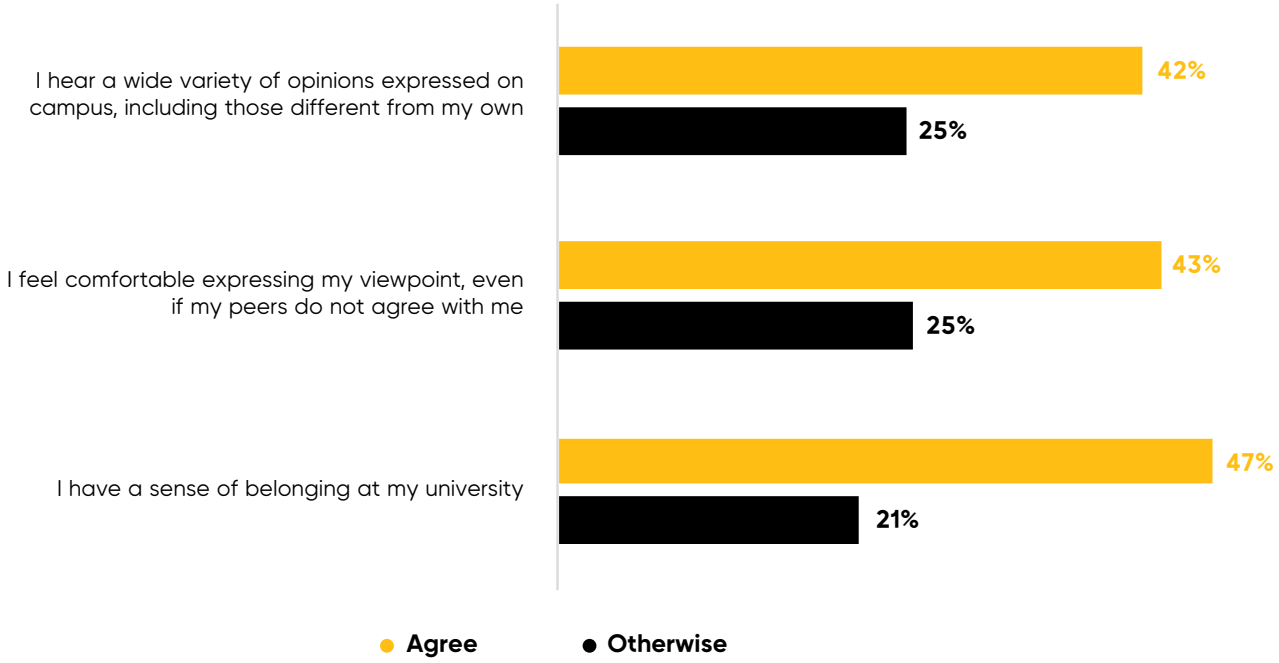
This finding suggests that the 'pandemic cohort' was less likely to report good or very good value for money throughout their studies.

A suite of 12 variables describing students' characteristics and their personal circumstances turned out to explain very little (between 2.6% and 3.5%) of the probability of reporting good or very good value for money for their course. This is a very weak effect and suggests that perception of value for money is not materially affected by students' personal characteristics,

such as sex, disability or ethnicity. Students' personal circumstances, such as term-time accommodation or term-time work, also do not materially impact their perception of value for money of their course.

The results are different when it comes to students' wellbeing and sense of belonging. As Figure 3.15 shows, those who agree with the sense of belonging items are generally twice as likely to report receiving good or very good value for money than their counterparts (those who are neutral or disagree with these items).

Figure 3.15 Proportion of students reporting good and very good value for money their course offers by their agreement with belonging items, 2022 to 2025



In the logistic regression model these factors explain up to 15% of the probability of reporting good or very good value for money on their course. This is a medium effect and relatively the most important items are: sense of belonging, feeling comfortable expressing their views on campus and perceiving life as worthwhile. Those who agree they feel like they belong on campus, those who agree they feel comfortable expressing their views and those with a higher score on the life worthwhile wellbeing scale are all more likely to perceive their course as providing good or very good value for money.

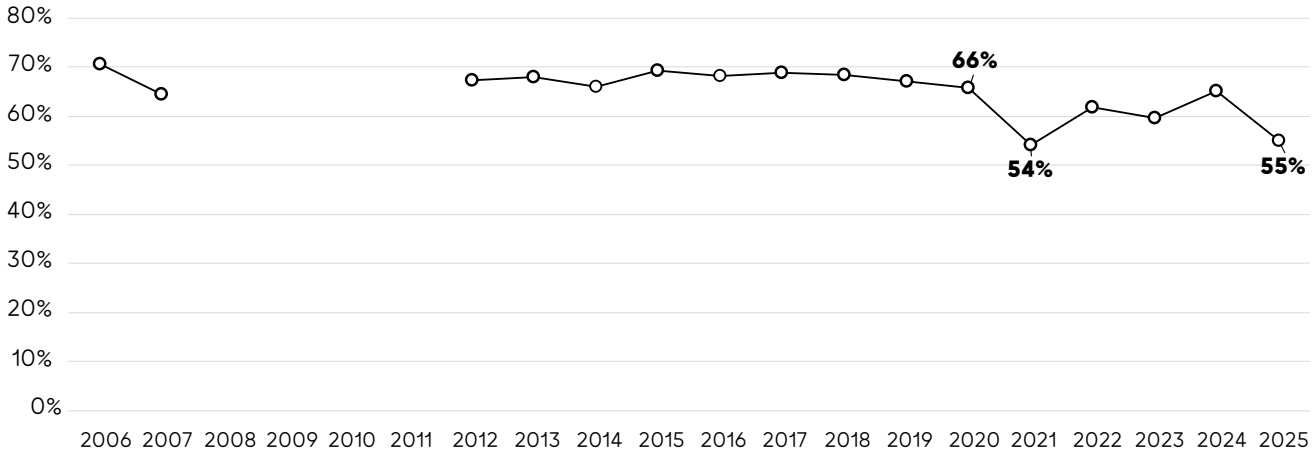
4.

Satisfaction with timetabled sessions and access to academic staff

This section examines how satisfied students are with their access to teaching staff outside scheduled classes, as well as their satisfaction with the number of timetabled sessions. These questions have been consistently included in the HEPI / Advance HE *Student Academic Experience Survey* over the years. Responses were collected using a 5-point Likert scale, but for analysis, answers were grouped into a binary variable: 1 represents Strongly agree and Agree, while 0 includes all other responses. The analyses focus on the likelihood that students agree with these two statements regarding their satisfaction in these areas of their academic experience.

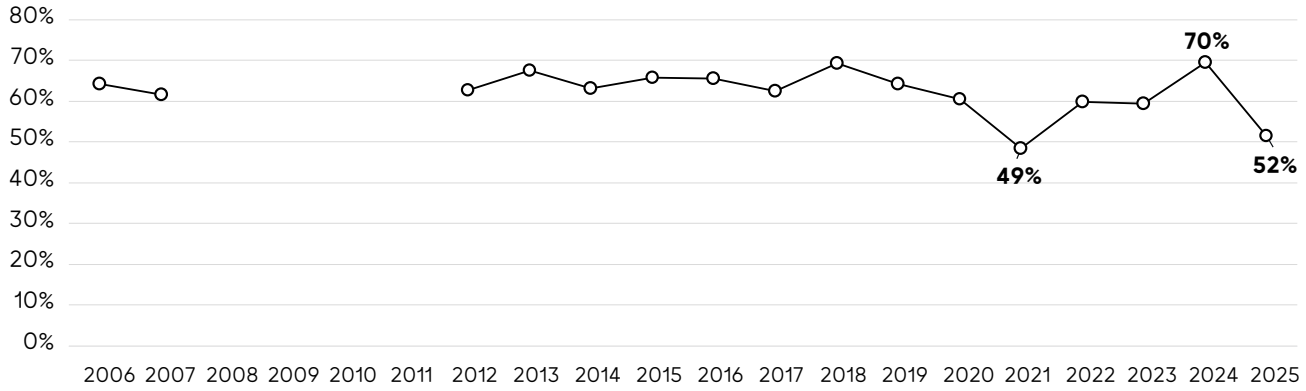
As shown in Figure 4.1, most students (between 60% and 70%) reported adequate access to staff outside scheduled sessions. This proportion remained consistent over a number of years before declining sharply to 54% during the pandemic in 2021. Following the pandemic, the data have fluctuated more, with another marked decrease in 2025, reaching levels comparable to those observed in 2021.

Figure 4.1 Percentage of students who agree with the statement that they have sufficient access to academic staff outside of timetabled sessions, 2006 to 2025



Most subjects followed the overall trend, except Law. Law students reported the largest drop in agreement, albeit from a high 70%, about access to teaching staff outside scheduled sessions between 2024 and 2025 (Figure 4.2). While this result may indicate some practical significance, the logistic regression model has shown that subject is not a good predictor of the proportion of students who agree with this statement.

Figure 4.2 Percentage of Law students who agree with the statement that they have sufficient access to academic staff outside of timetabled sessions, 2006 to 2025

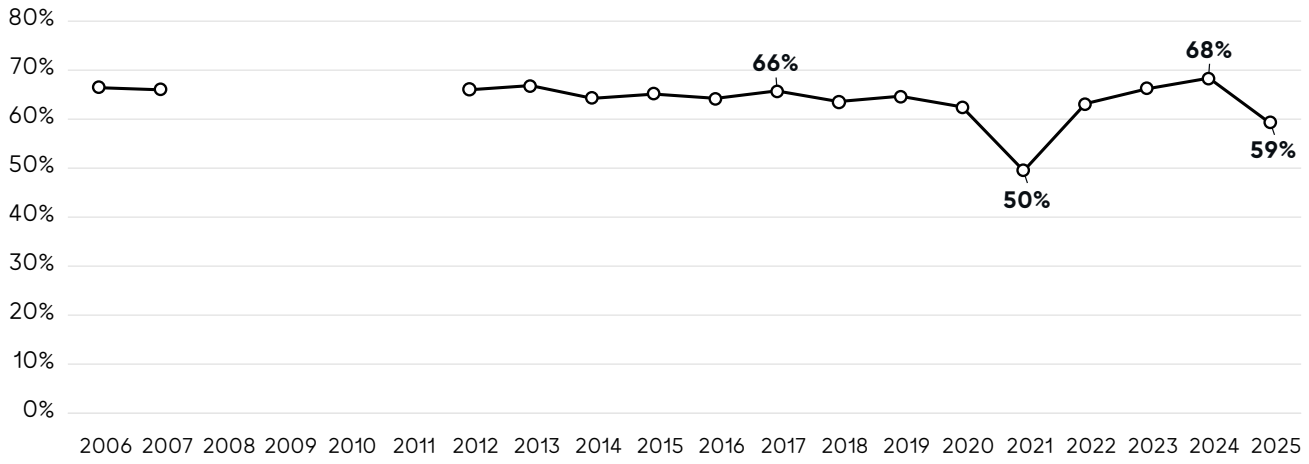


A logistic regression model was employed to evaluate the extent to which students' characteristics and circumstances influence the likelihood of their agreement that they have sufficient access to academic staff outside scheduled sessions. Collectively, these factors account for only a small proportion of the variance in students' perceptions of access to staff (between 2.6% and 3.5%), suggesting that satisfaction with access to academic staff outside timetabled hours is minimally affected by individual circumstances or characteristics.

Additionally, a logistic regression model assessed the impact of students' wellbeing and their sense of belonging on campus on their satisfaction with access to teaching staff. Findings indicate that students who report a sense of belonging on campus and perceive their environment as inclusive are more likely to be satisfied with access to staff outside of scheduled sessions than those who do not share these views. A sense of belonging and inclusivity collectively explains up to 10% of the likelihood of being satisfied with staff access, representing a weak effect. These factors were also found to be stronger predictors than students' wellbeing scores, as wellbeing ceased to be a strong predictor once a sense of belonging and inclusivity were accounted for.

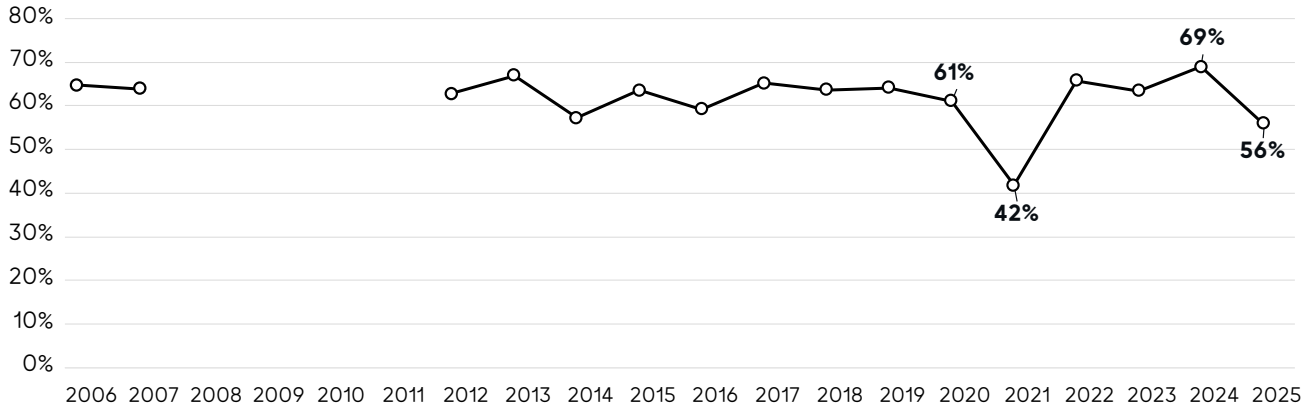
Turning to satisfaction with the number of timetabled sessions, Figure 4.3 shows it was also stable (above 60%) over the years, decreasing sharply to 50% in 2021 due to the pandemic. While it recovered strongly after that, it dipped again in 2025.

Figure 4.3 Percentage of students who agree with the statement that they are satisfied with the number of timetabled sessions they have had this year, 2006 to 2025



Generally, all broad subjects followed the same pattern over the years, with a dip in 2021 and another dip in 2025. Law students are a notable exception, as they experienced bigger dips in both years compared to students studying any other subject (Figure 4.4). Despite this, the logistic regression model results do not show subject area as a strong predictor of satisfaction with the number of timetabled sessions.

Figure 4.4 Percentage of Law students who agree with the statement that they are satisfied with the number of timetabled sessions they have had this year, 2006 to 2025



There is no strong correlation between the number of scheduled or attended hours during term time and students' satisfaction with their timetabled sessions. According to the logistic regression model, these factors account for up to 3% of the variation in satisfaction, a minor influence. It appears that, for students, the hours they actually attend have a slightly greater impact on their satisfaction than the hours simply scheduled.

Teaching staff activities are reasonably strong predictors of student satisfaction regarding the number of scheduled sessions. Collectively, these factors account for up to 12% of the probability, representing a medium effect size. Students who reported that most or all their teaching staff were helpful and supportive, communicated course objectives and requirements clearly and provided constructive feedback, were markedly more likely to express higher satisfaction with their timetabled sessions. In contrast, students who indicated that most of their teaching staff delivered courses in an unstructured manner and struggled to clarify concepts were less likely to be satisfied with the number of scheduled sessions.

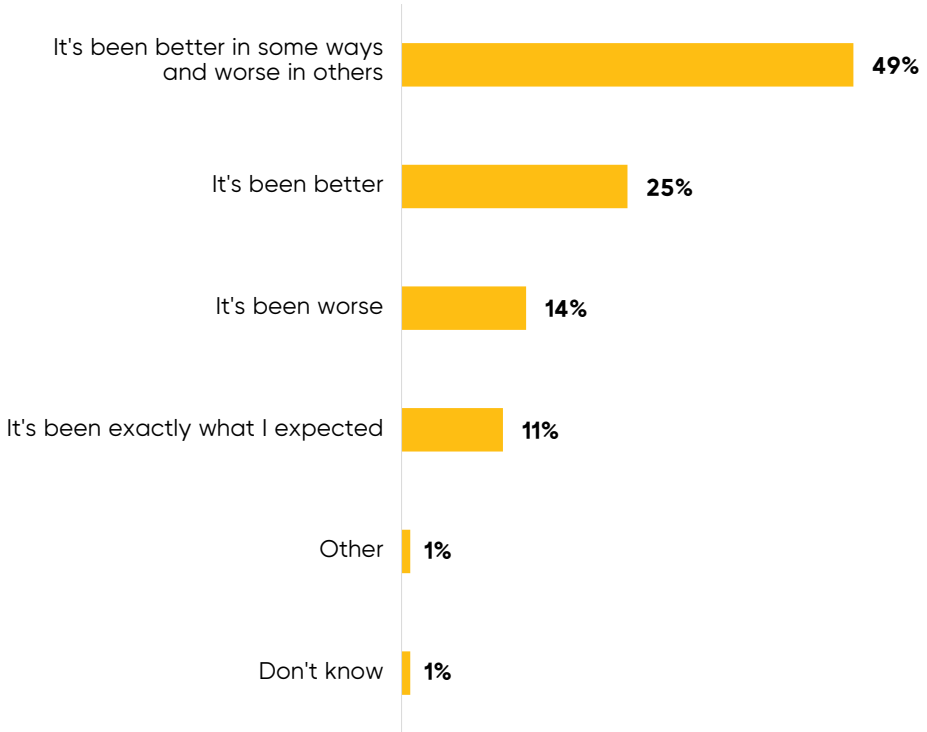
The suite of variables describing students' characteristics and circumstances were also used in the logistic regression model. Their cumulative effect on satisfaction with the number of timetabled sessions was weak (between 2.3% and 3.2%). Variables linked to students' sense of belonging and inclusivity on campus turned out to be stronger predictors, explaining up to 8% of students' satisfaction with the number of timetabled sessions.

5.

Students' expectations versus their experience

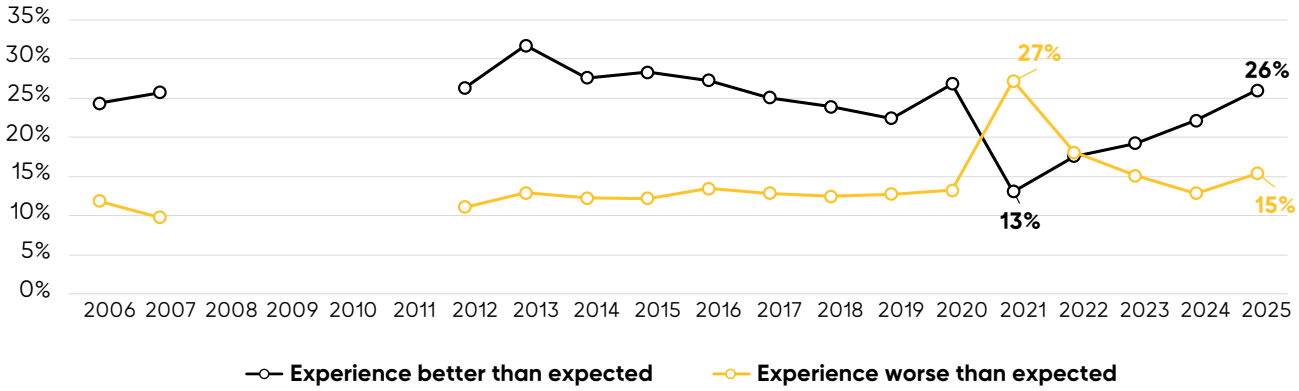
This section examines whether students' experience of their course aligned with their expectations. It is important to mention that the HEPI / Advance HE *Student Academic Experience Survey* does not assess what students expected before starting their course, so there is a lack of information about these initial expectations. For example, students paying £9,000 in fees may expect something different compared to those paying £3,000 or £20,000. Those aiming for a well-paid job after graduation might approach their course differently than students who study out of a passion for the subject. Students attending more academically selective universities could also have distinct expectations from those at less academically selective institutions. As a result, the analyses focus on whether students felt their expectations were exceeded or fell short, as well as the factors influencing those perceptions. Figure 5.1 shows nearly half of students found their experience both better and worse than expected. Only one-in-10 students stated their experience was exactly what they expected.

Figure 5.1 'Thinking back to when you applied to your current university, has the reality of your academic experience matched your expectations?', 2006 to 2025



While overall a quarter of students reported their experience was better than expected, this has been in slow decline since 2015, and the number halved in 2021. It has been on a strong recovery trend ever since. The proportion of students stating their experience was worse than expected was stable between 2006 and 2020 and then soared in 2021 due to COVID-19. Since then, it has been in clear decline but increased slightly between 2024 and 2025 (Figure 5.2). It should be noted that 'experience worse than expected' does not exactly behave as 'negative' to the 'experience better than expected', as both of those increased in 2025.

Figure 5.2 Experience versus expectations over time, 2006 to 2025



The logistic regression analysis indicates that broad subject is a weak predictor of the likelihood of respondents reporting their experience as better than expected. However, certain subjects reveal notable patterns that may hold practical significance for policymakers.

For example, the post-pandemic recovery trend in a 'better than expected' experience is particularly visible among Business and Administration and STEM students (Figures 5.3 and 5.4). In turn, the proportion of Creative Arts and Design students who stated their experience was worse than expected did not immediately fall after the pandemic (Figure 5.5). The proportion of Medicine and Dentistry students who stated their experience was worse than expected remained relatively high after the pandemic, compared to the general trend and other broad subjects (Figure 5.6). It is also worth noting that for these students, the distance between 'experience better than expected' and 'experience worse than expected' is much smaller after the pandemic than it was before 2021.

Figure 5.3 Experience versus expectations over time, Business and Administration students, 2006 to 2025

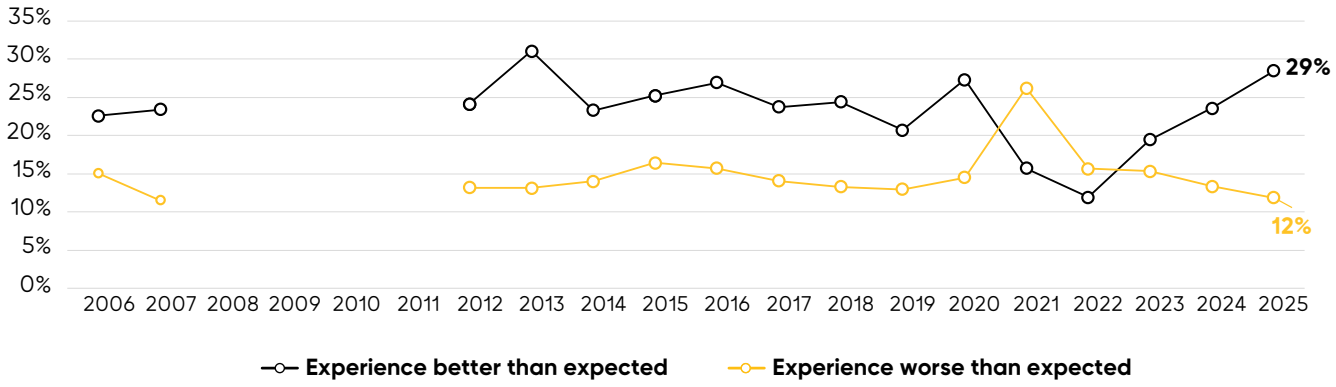


Figure 5.4 Experience versus expectations over time, STEM students, 2006 to 2025

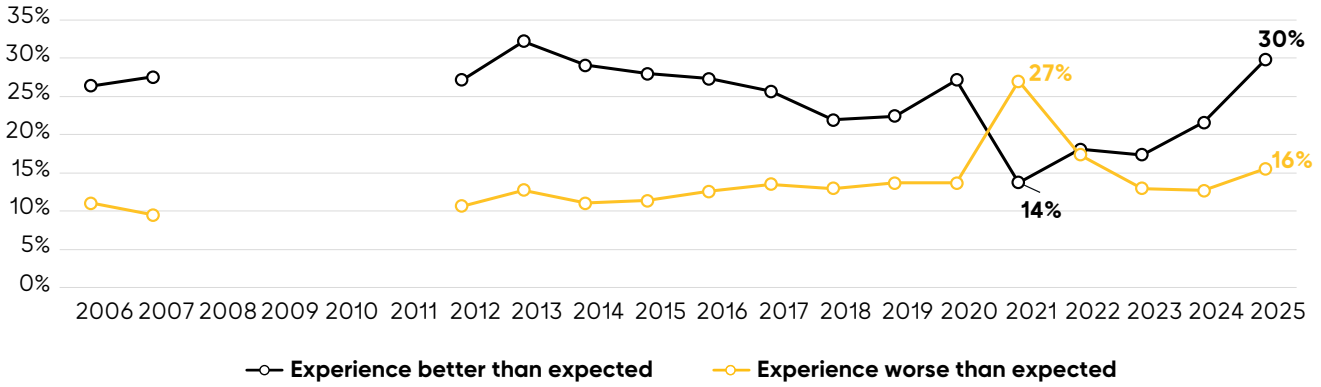


Figure 5.5 Experience versus expectations over time, Creative Arts and Design students, 2006 to 2025

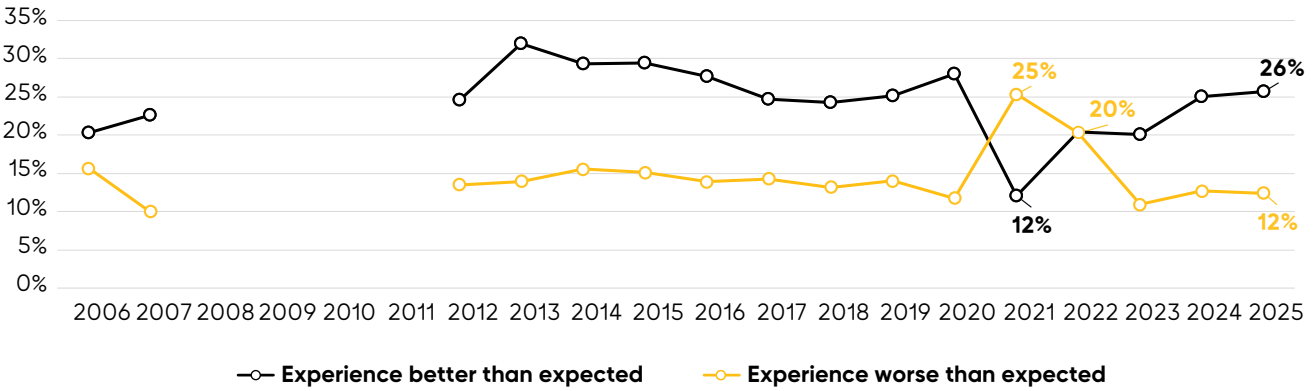
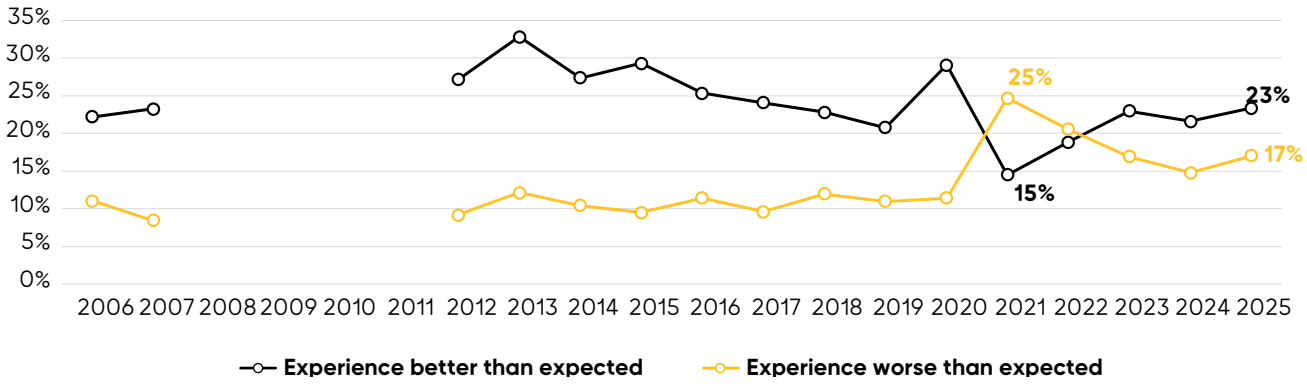


Figure 5.6 Experience versus expectations over time, Medicine and Dentistry students, 2006 to 2025



Experience better than expected

Variables describing students' characteristics and circumstances are limited in their ability to predict whether students report experiences that exceeded their expectations. Eight factors were found to be statistically significant in the logistic regression model: fee status; term-time accommodation; number of hours worked during term time; care leaver status; sex; ethnicity; distance travelled to campus; and estrangement from parents. Collectively, these variables account for up to 5% of the variation in 'better than expected' experience, which is a weak effect. Among these, fee status was relatively the most influential predictor, with international students more frequently indicating that their experiences surpassed expectations. Students residing with family or in university-owned halls were more likely to report positive experiences compared to those living in non-university halls or private shared accommodation. Additionally, students who undertook employment during term-time, irrespective of the number of hours worked, tended to rate their experiences as better than expected compared to those who did not work.

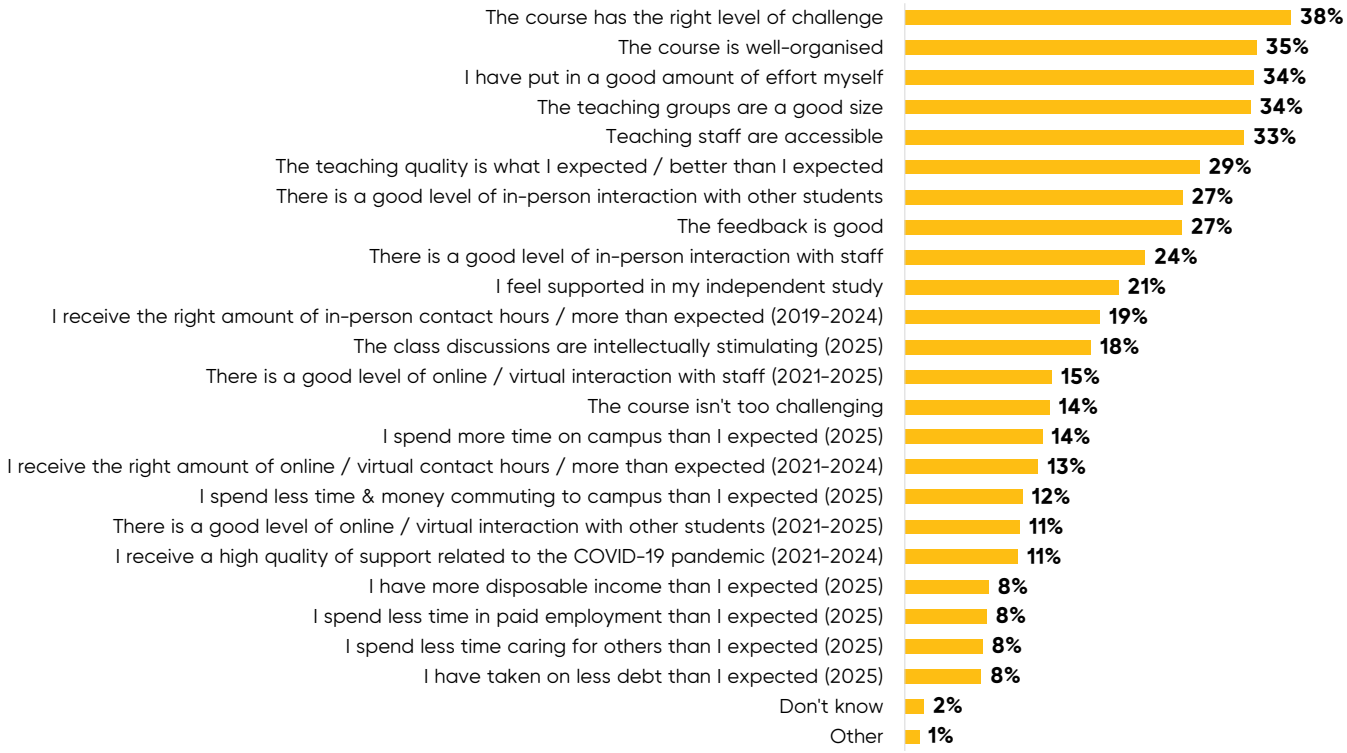
Yet again, wellbeing factors explained students' positive experiences more effectively than demographics. Students with higher life satisfaction, a sense of belonging on campus, feeling comfortable expressing their views and feeling life is worthwhile were more likely to have 'better than expected' experiences than those with lower wellbeing scores and a lower sense of belonging. These factors account for up to 15% of this outcome, a medium effect.

From 2019 onwards, those who reported experience better than expected have been asked what aspects of their experience they were thinking of when answering the question. Figure 5.7 shows the proportion of students choosing each aspect (they could choose as many as applied). Aspects such as course challenge, course organisation, the student's own effort, group sizes or access to teaching staff were popular

among this group. Survey items relating to the cost of study and employment were not strongly linked with experience exceeding expectations.

For example, only 8% of students considered their disposable income when reporting a 'better than expected' experience.

Figure 5.7 'You've said that your experience is better than expected. Why do you feel this is?', 2019 to 2025



There were 11 items consistently asked between 2019 and 2025 in relation to positive experience, and they were used as predictors in the logistic regression model. Eight of them turned out to be statistically significant and, combined, explain up to 13% of the experience being 'better than expected'. Students were most likely to state their experience was better than their expectations when they felt supported in their independent study, had good levels of in-person interaction with staff, the teaching quality was better than expected, students had good levels of in-person interaction with other students and the course was well organised.

In 2021, two new items were introduced asking about online / virtual interactions with teaching staff and with other students, to reflect the changes to course delivery during and after the pandemic. They were added to the model as described above, analysing data between 2021 and 2025. In-person interactions with teaching staff and with

other students were the second and third most important factors affecting 'better than expected' experience. Virtual / online interactions with other students were ranked fifth, above virtual / online interactions with teaching staff – ranked eighth out of nine items that remain statistically significant. This result suggests that in-person contact is valued more by students and contributes more to the positive experience than online contact.

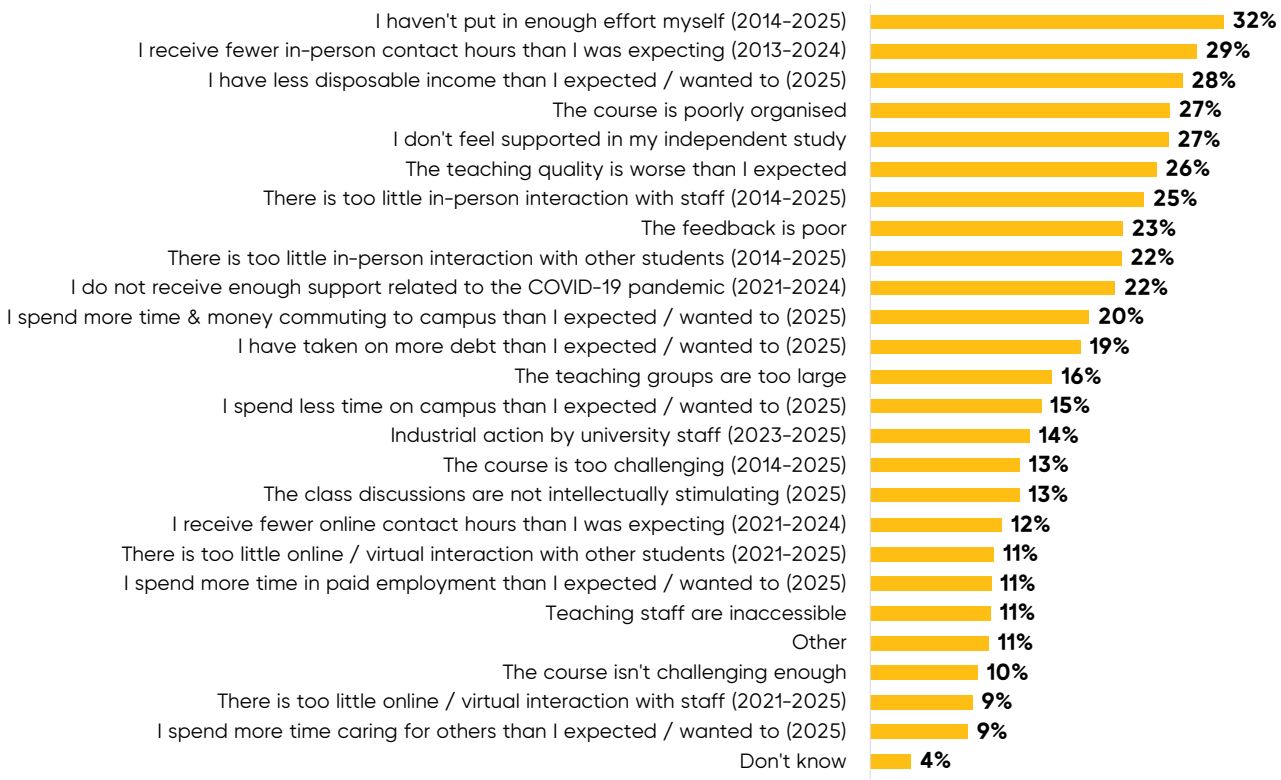
Experience worse than expected

Only four variables describing students' characteristics and circumstances turn out to be statistically significant in a logistic regression model looking at 'experience worse than expected'. These were disability status, term-time accommodation, estrangement from parents and ethnicity, and combined they explained only up to 2.2% of the probability of a below expectations experience. This is a very weak effect and suggests students' characteristics are not the main driver of an experience below their expectations.

Students' wellbeing scores were much stronger predictors of experience being below their expectations. Those who did not feel they belonged at university were much more likely to report their experience was not what they expected than those who felt part of their university. This factor on its own explained up to 17% of the probability of having a subpar experience. Those who reported lower satisfaction with life in general, those who reported their campus not being inclusive and those not feeling comfortable with expressing their opinions, were all more likely to have worse than expected experiences on their course. Combined, these factors explain up 20% of 'worse than expected' experience – a strong effect.

Since 2013, students who reported their experience being below their expectations were asked which aspects of their experience they were thinking of when considering their subpar experience. Figure 5.8 shows that students reporting experience below their expectations were most likely thinking they did not put in enough effort themselves, received fewer in-person hours than expected and had less money at their disposal than expected. Note that the question about disposable income was only asked in the most recent SAES wave in 2025, but it clearly suggests that a lack of funds may prevent students from having the best experience on their course. Other items related to finance, such as commuting costs and debt worries were also ranked high when thinking about experiences not meeting students' expectations.

Figure 5.8 'You've said that your experience is worse than expected. Why do you feel this is?', 2013 to 2025



Two logistic regression models were fitted to the data. One for the 2021 to 2024 waves to assess the relative importance of the pandemic-related items on students' experience, and one for the 2025 wave only, to assess the relative importance of the cost-of-living crisis items.

There were 16 factors in the first model and 15 of them remained statistically significant, with six being relatively the strongest predictors of a 'worse than expected' experience. These were teaching quality worse than expected, not enough support related to the COVID-19 pandemic, lack of support for independent study, poor course organisation, too little in-person contact with teaching staff and teaching staff not accessible. Interestingly, 'not putting in enough effort myself' was relatively the weakest predictor out of all the analysed factors. Combined, these factors explain up to 16% of the 'worse than expected' experience on the course during the pandemic years.

The second logistic regression model included 21 different factors, including the cost-of-living crisis items, trying to explain why students in 2025 reported their experience to be worse than expected. There were 12 factors that remained in the model as statistically significant and combined explained up to 8% of the 'below expectations' experience reported by students.

Relatively the most important factors were still those linked to course delivery: teaching quality worse than expected (first); poor feedback (second); teaching staff inaccessible (third); lack of support for independent study (fifth); and poor course organisation (sixth). Cost-of-living crisis items were relatively less important, except for disposable income available, which was ranked fourth.

The findings indicate that how students feel about their course – whether it surpasses or falls short of expectations – is closely tied to factors like course organisation, teaching quality, support for independent learning, face-to-face interactions with staff and peers and the effort students put into making the most of their experience. Students who report higher wellbeing and a stronger sense of belonging at university are also more likely to have experiences that exceed their expectations. An inclusive campus environment also enhances student satisfaction. Meanwhile, the subject studied or individual circumstances have minimal influence on students' perceptions of their course experience.

6.

Attendance

Since 2006, students were asked:

How many hours of timetabled sessions did you have scheduled in an average week during term time? And about how many hours did you attend in the average week?

This section is concerned with how many hours were scheduled and attended, and how they have changed over time. Particular attention is given to attendance, defined as the difference between hours scheduled and attended.

As Figure 6.1 shows, the average number of scheduled hours was around 14 per week and was relatively constant until 2020. After a dip during the pandemic, the number of hours increased to around 15 and remained stable in recent years. In 2006 the difference between hours scheduled and hours attended was, on average, just over an hour. It has been steadily growing since 2015 and this gap widened particularly after the pandemic. In 2025 the average gap was 2.4 hours.

Figure 6.1 Average weekly number of hours scheduled and attended, 2006 to 2025

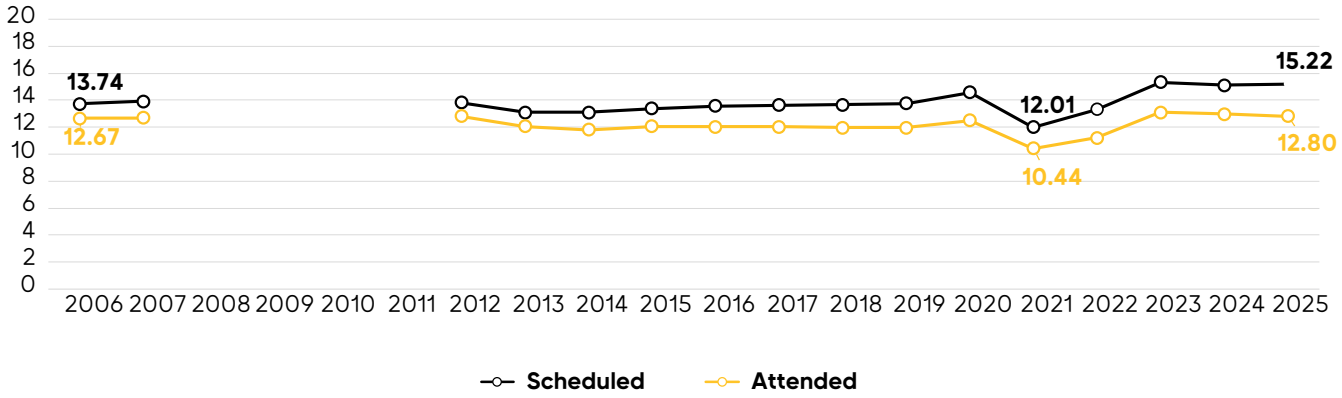
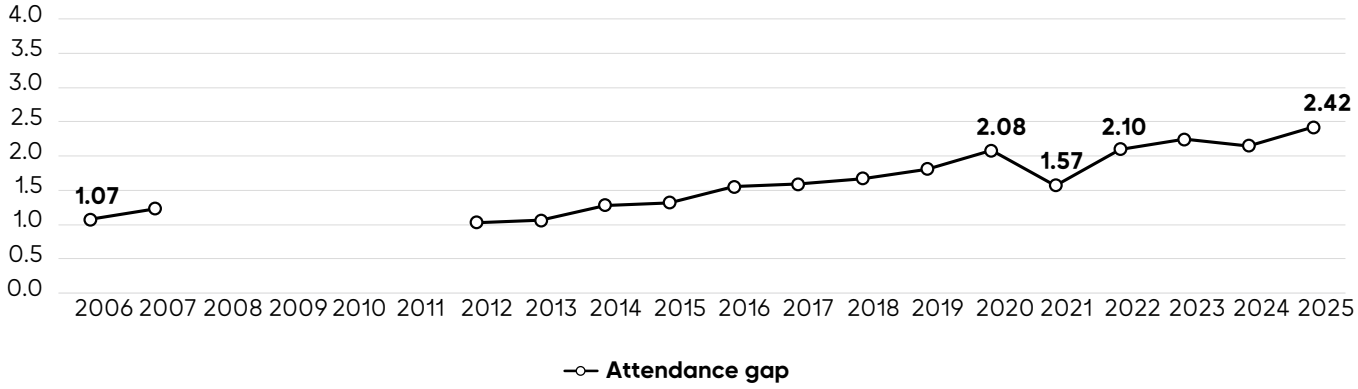


Figure 6.2 shows the actual gap between hours scheduled and attended. This attendance gap has been steadily growing since 2014 with a small dip in the pandemic year.

Figure 6.2 Attendance gap (hours), 2006 to 2025



Something to bear in mind is that the notion of 'attendance' might have changed after the pandemic. Students can now catch up on lectures online and there is less pressure to attend in person. At the same time, the proportion of students in term-time employment has increased and there has been a rise in commuter students. Both have the potential to affect students' attendance and are explored in more detail below.

A binary variable was defined to indicate the existence of an attendance gap, taking the value 0 if there was no attendance gap and 1 if an attendance gap existed (when the number of attended hours was less than scheduled hours). Overall, 59% of students did not experience an attendance gap, meaning they attended all their scheduled hours. However, this percentage varied and generally

declined over time: in 2006, 63% of students attended all scheduled classes, while by 2025, this had dropped to 48%.

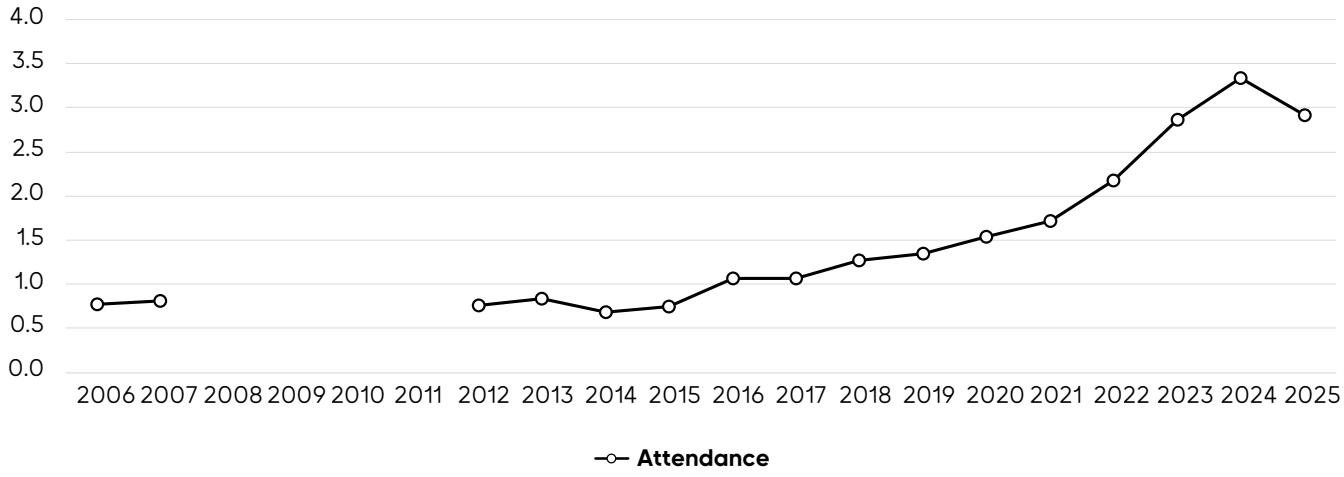
Because the attendance gap is measured as an average across all students, the number of hours missed by the one-half of students (52%) who missed any teaching time in 2025 is much higher – or just over double at five hours. This equals one-third of their average total timetabled teaching time of 15 hours per week.

Several linear regression models were used to evaluate how student characteristics and circumstances affect attendance.[14] None of the models resulted in a sufficiently good fit to suggest a large enough impact of said variables on attendance. However, a number of statistically significant differences were discovered that could still be of interest to policymakers and university staff concerned with the increasing attendance gap.

By subject

Most subjects follow a similar pattern over time to the one shown in Figure 6.2. One notable exception is Medicine and Dentistry students. Their attendance gap accelerated after the pandemic and in 2024 they were missing on average more than three hours of class. This is almost 16% of their scheduled contact time (Figure 6.3). It dropped slightly in 2025.

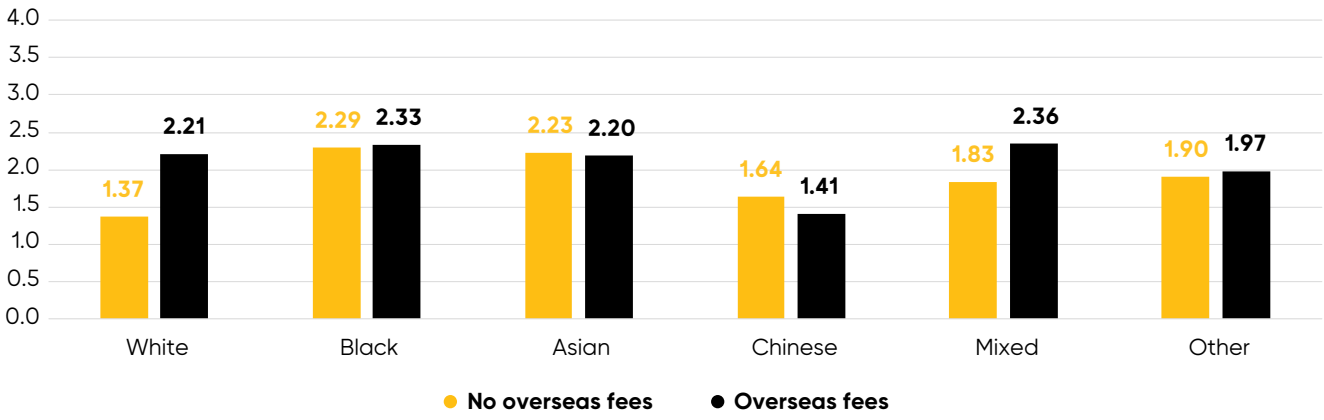
Figure 6.3 Attendance gap (hours), Medicine and Dentistry students, 2006 to 2025



By students' characteristics and circumstances

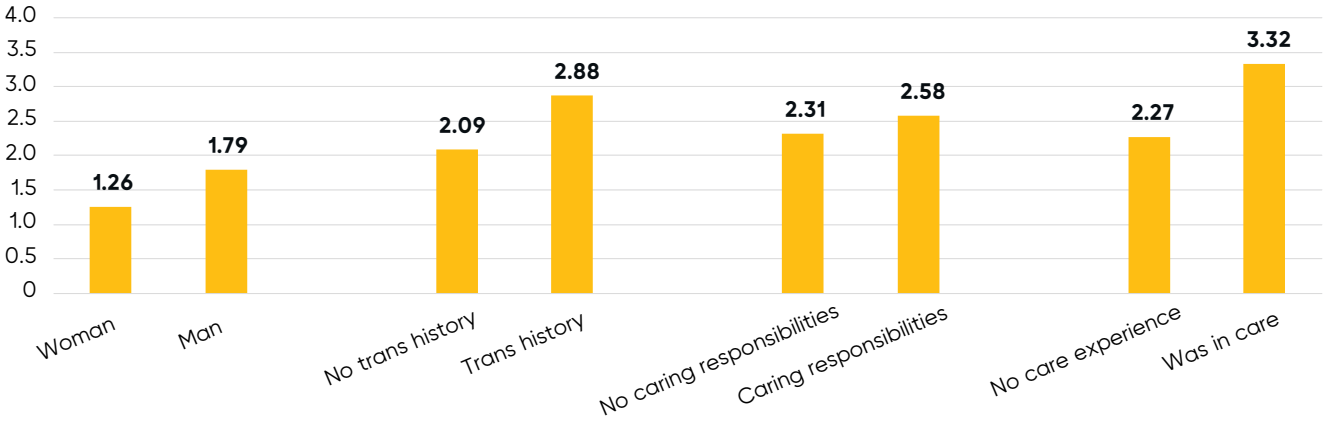
There are some noticeable differences between different ethnicities (Figure 6.4). The graph shows the attendance gap for those paying international fees and those not paying international fees. Black and Asian UK students are statistically significantly more likely to have a larger attendance gap than their White counterparts.. The same cannot be said for international students, although they generally have higher attendance gaps regardless of ethnicity.

Figure 6.4 Attendance gap (hours), by ethnicity and fee status, 2012 to 2025



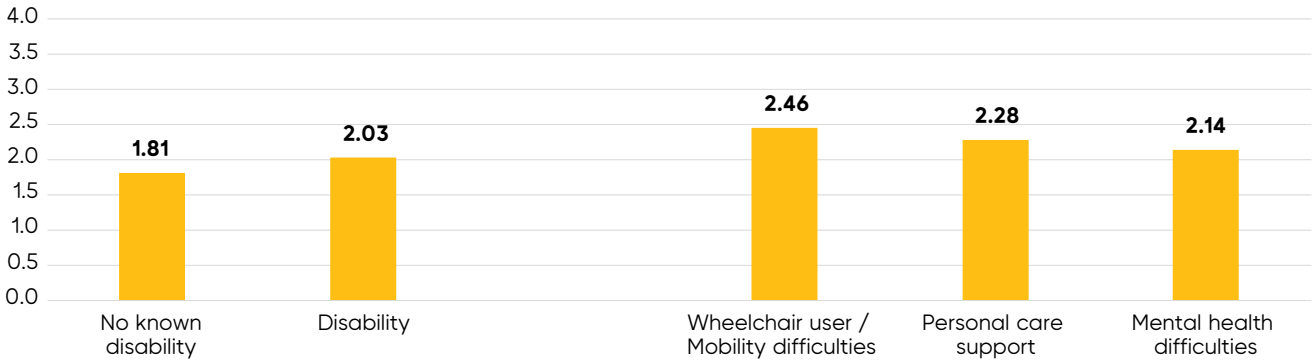
A range of other demographic characteristics and circumstances also play a part when it comes to the attendance gap. As Figure 6.5 shows, men are more likely to miss classes than women, as are those with a trans history or caring responsibilities compared to their counterparts. The largest gap of more than one hour can be seen between those who experienced care and their counterparts.

Figure 6.5 Attendance gap (hours) by sex (2006 to 2025), trans history (2021 to 2025), caring responsibilities or care experience (2023 to 2025)



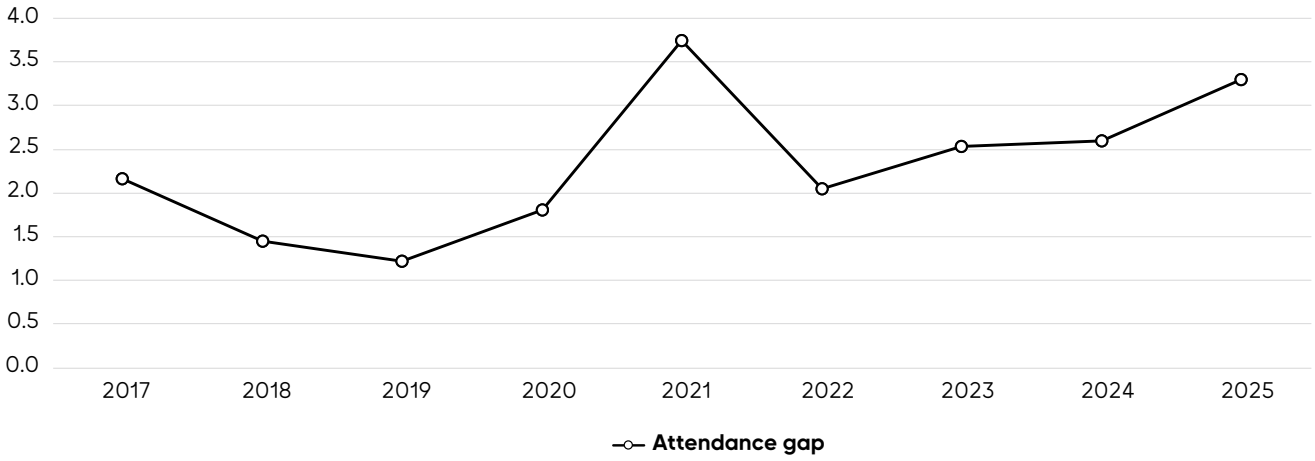
Both students with and without a known disability showed the same trend over time of an increasing attendance gap (not shown here). However, students with a disability are in general more likely to miss scheduled classes than their counterparts with no known disability. This is especially true for wheelchair users, those on a personal care support and those with mental health conditions (Figure 6.6).

Figure 6.6 Attendance gap (hours), by disability, 2017 to 2025



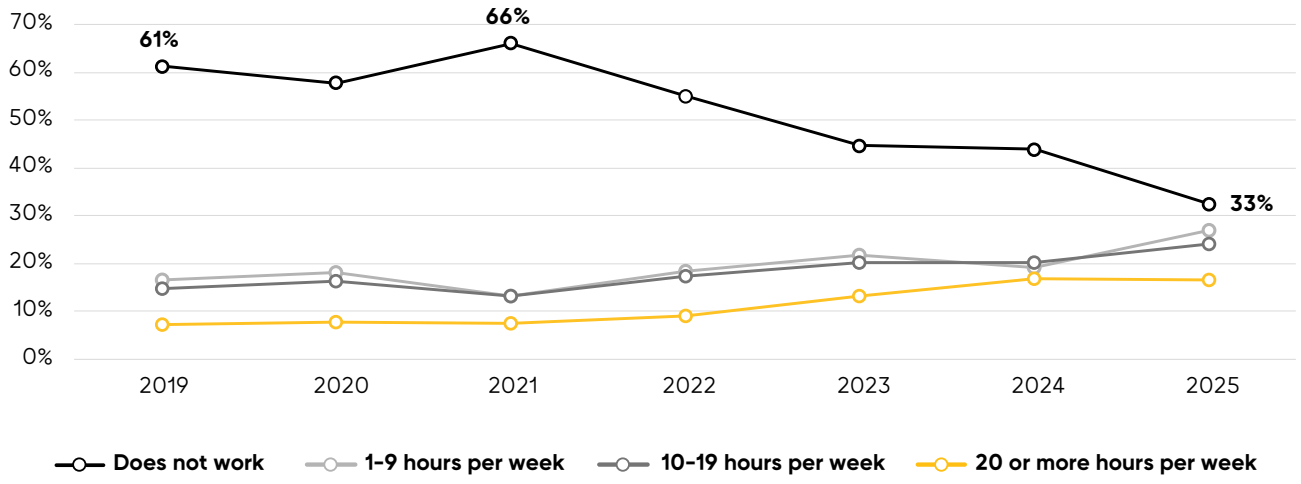
While the numbers in the Survey are very small, around 100 students per year, those with mobility difficulties and those using personal care support were particularly prone to missing their classes during the pandemic (Figure 6.7). This trend runs counter to the overall survey population.

Figure 6.7 Attendance gap (hours), mobility difficulties and personal care support plan students, 2017 to 2025



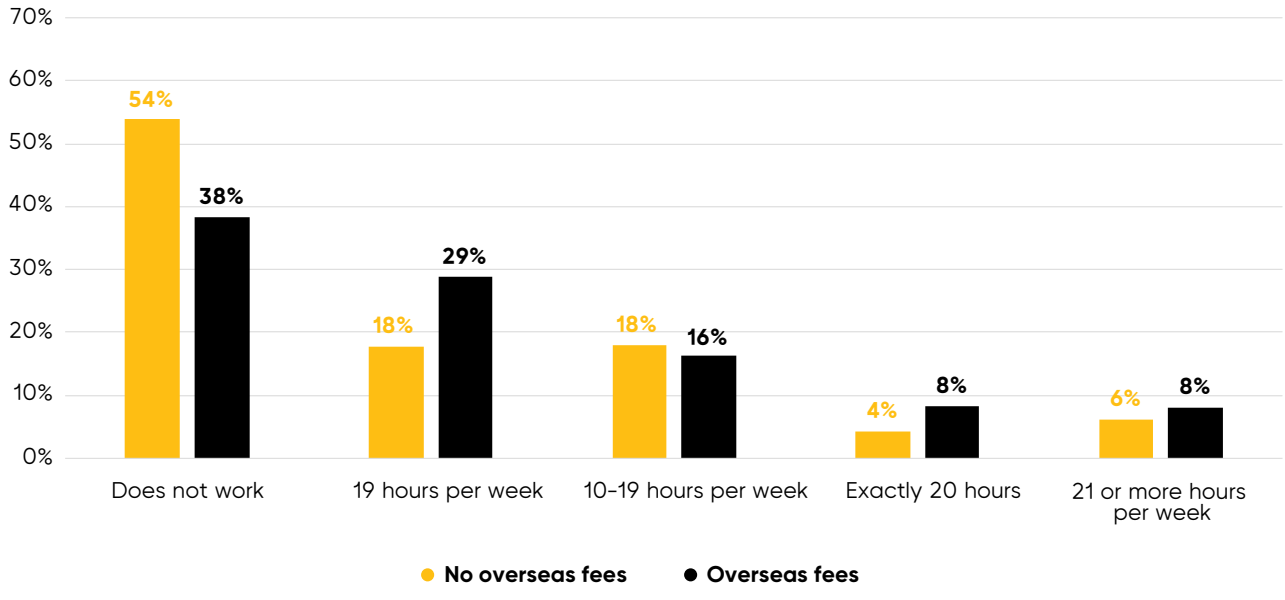
Between 2019 and 2025, the proportion of students who do not work during term-time halved (Figure 6.8). In the 2025 HEPI / Advance HE *Student Academic Experience Survey*, 68% of students were engaged in some form of paid work during term time.[15]

Figure 6.8 Hours worked in average week during term-time, 2019 to 2025



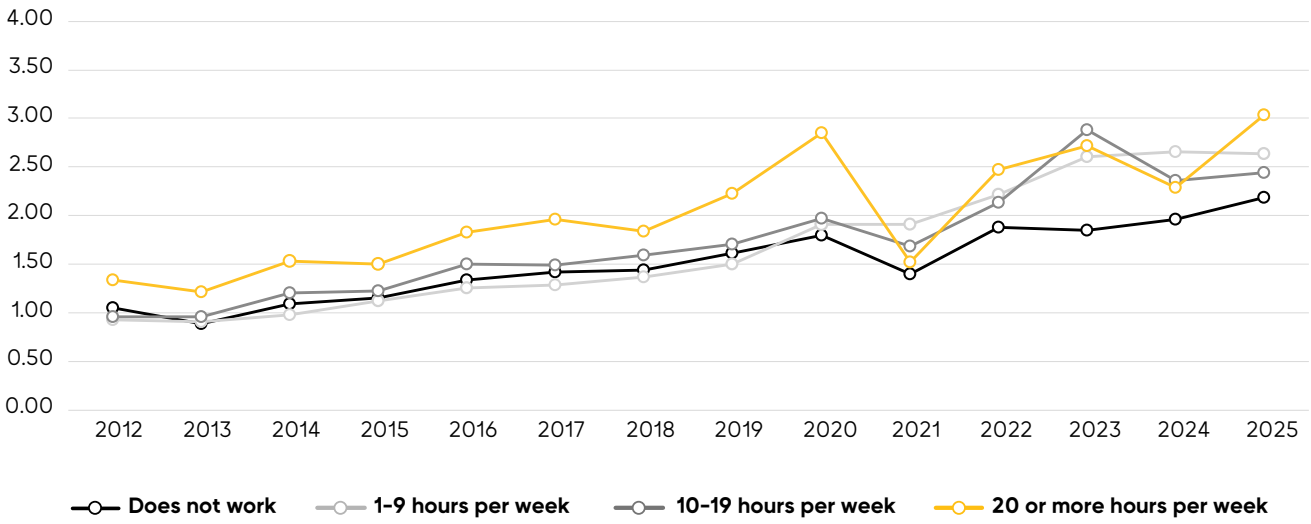
Students paying international fees are more likely to work during term-time than their UK counterparts. While international students are not allowed to work more than 20 hours per week under visa rules, Survey results suggest that more than 8% of international students work 21 hours or more per week. This figure is also higher than for UK students (Figure 6.9). There are certain limitations in the way the data are defined, meaning there is some uncertainty. That said, the evidence suggests that at least some students paying international fees may be EU students with settled status, who are allowed to work more than 20 hours per week.

Figure 6.9 Hours worked in an average week term-time by fee status, 2019 to 2025



While the attendance gap has grown over time for all students, it is larger for those in employment. This suggests that students who work during their studies, particularly those working 20 hours or more, tend to miss more classes than students who do not undertake paid employment (Figure 6.10).

Figure 6.10 Attendance gap (hours), by hours worked in an average week in term-time, 2012 to 2025



There are two notable trends when it comes to employment and the attendance gap shown in Figure 6.10. Before the pandemic, students who did not work, those working between one and nine hours per week and those working between 10 and 19 hours a week had very similar attendance gaps. This suggests that working students fit their work around their scheduled classes. After the pandemic, all students who work, regardless of the number of hours, have larger attendance gaps than those who do not work. It is likely that the ability to catch up on lectures online gives working students more flexibility, but results in more missed classes. In 2025, those working missed on average 2.6 hours compared to 2.2 hours missed by non-working students.

The second trend is that those working 20 hours or more saw a marked decline in missed classes in 2021. It may be that those working 20 hours or more were employed in jobs particularly affected by the pandemic (for example, in hospitality) and were potentially furloughed, allowing them to attend classes. Another possible explanation is that attendance in 2021 could be well understood by students as online attendance, hence the attendance gap temporarily decreased.

The link between term-time accommodation and commuting and skipped classes is somewhat less clear. In the past seven years, there has been a real shift in where students live during term time. In 2021, during the pandemic, a large proportion of students lived at home with their families (34%).

After a temporary decrease in 2022, in 2025 37% of respondents lived at home. The proportion of students living in university halls of residence or in privately rented shared accommodation has been declining, most likely driven by the cost-of-living crisis (Figure 6.11). This shift in term-time accommodation is likely to increase the number of commuter students. As Figure 6.12 shows, those living at home are more likely to be further away from campus.

Figure 6.11 Students by term-time accommodation type, 2019 to 2025

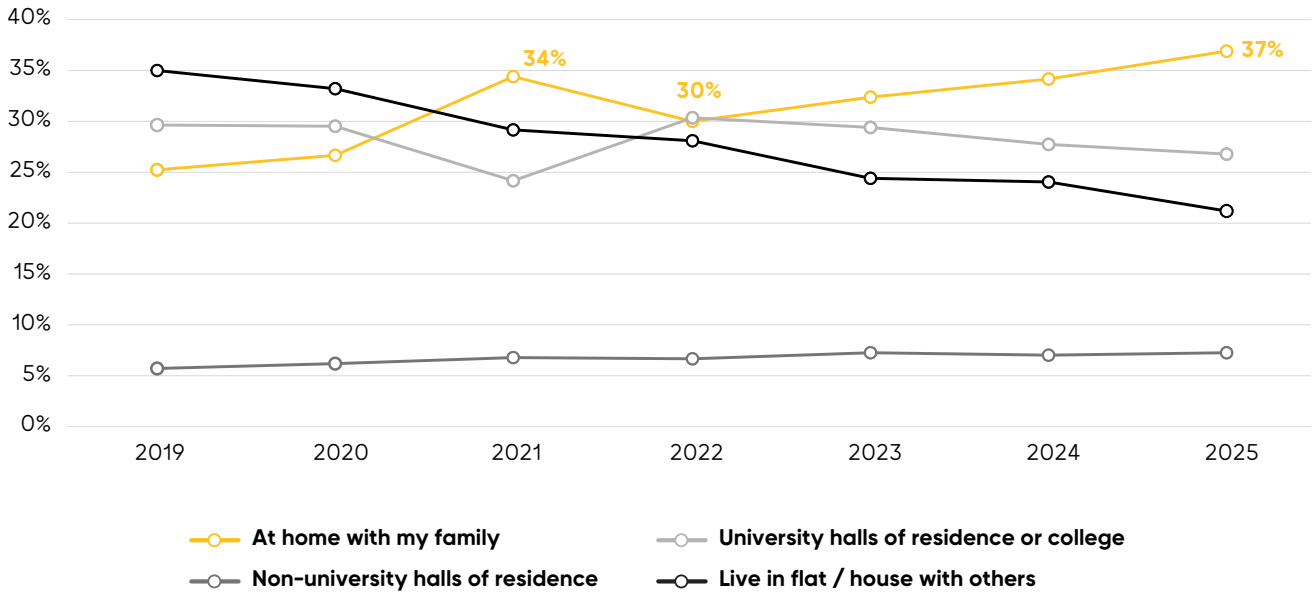
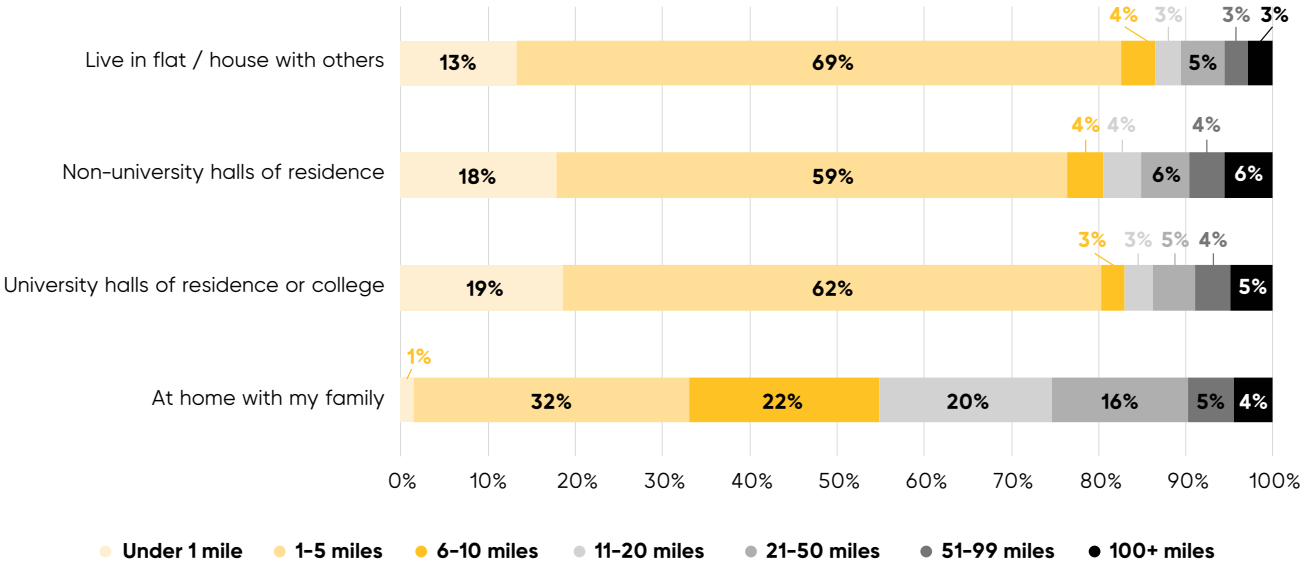
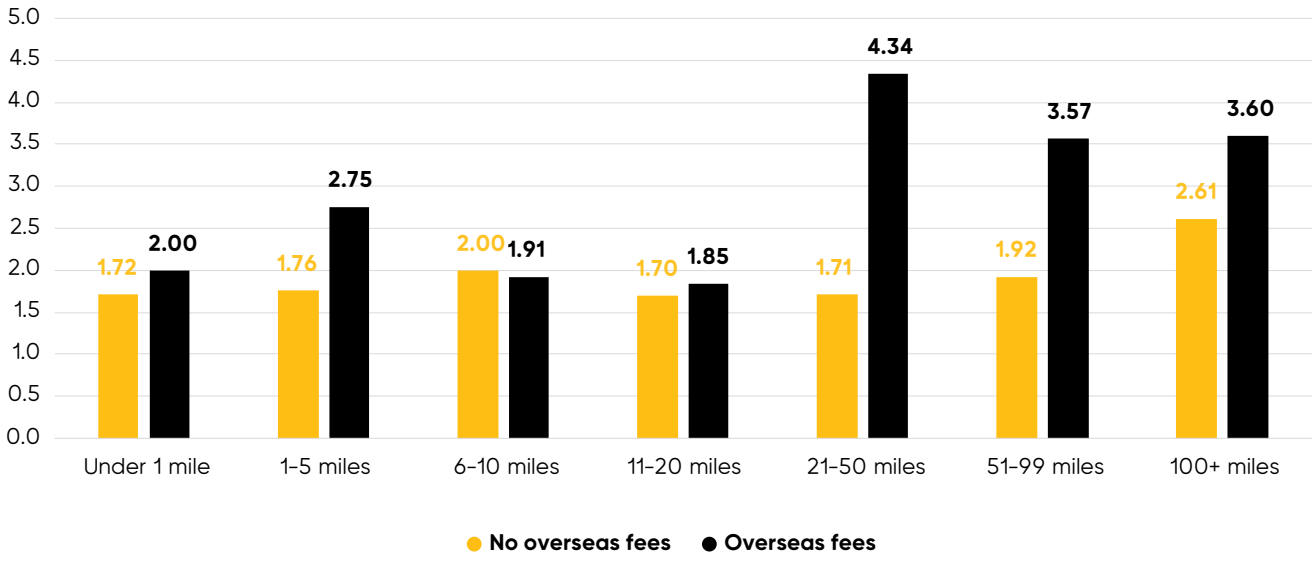


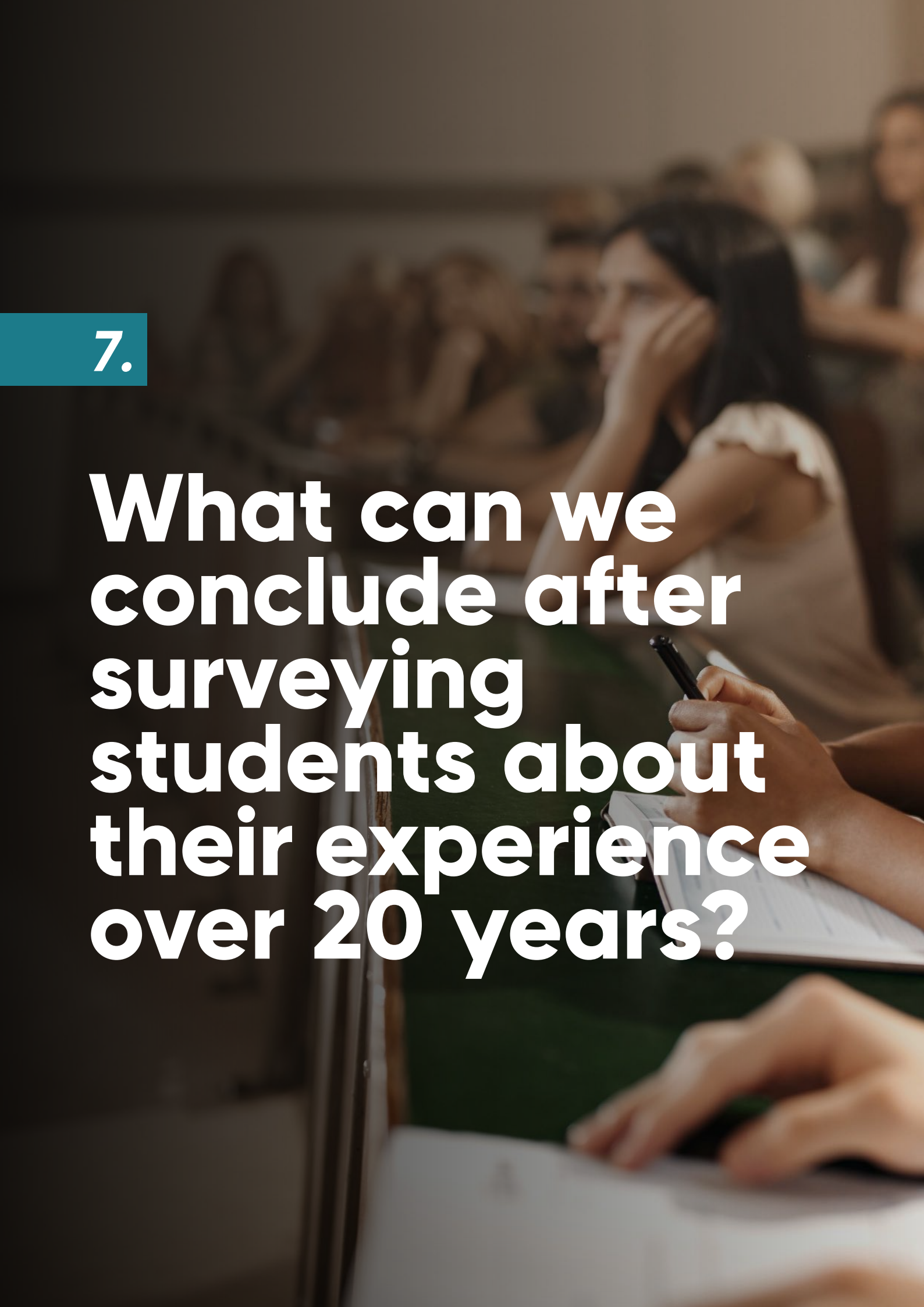
Figure 6.12 Distance to campus by accommodation type, 2019 to 2025



There is no clear pattern of a relationship between distance travelled to campus and missed scheduled classes, especially among UK students (Figure 6.13). One possible explanation may be that if those living between 11 and 50 miles from campus are also more likely to live with family, they may also be more motivated to attend all scheduled classes. Alternatively, their attendance may be considered predominantly online, as they live so far away from campus.

Figure 6.13 Attendance gap (hours), by distance travelled to campus and fee status, 2019 to 2025





7.

What can we conclude after surveying students about their experience over 20 years?

Rose Stephenson, Director of Policy and Strategy, HEPI

The many changes seen in the student experience over the last 20 years – including the reduction in part-time learners and expansion in full-time numbers, rising tuition fees, COVID-19, growing mental health challenges, the increasing presence of technology in students' lives and the mainstream use of generative AI – demonstrate that the context for higher education has shifted significantly.

Yet the key findings from 20 years of research are perhaps surprisingly simple: a good student academic experience ultimately comes down to quality teaching, access to in-person interaction with teachers and a strong sense of belonging.

Teaching quality

As the report explains:

Teaching quality is the single most important driver in student experience. Receiving good or very good value for money and a better than expected experience overall is inherently linked to good teaching. The most important aspects for students are helpful and supportive staff, clear explanations of course expectations, good course organisation and useful and timely feedback.

It is tempting to presume that maintaining what might traditionally be considered 'good quality teaching' will be more challenging in a world where students are balancing study time with paid employment, where flexible delivery models have become the norm and AI is forcing all educators to rethink their approach. However, the evidence in this report demonstrates that good teaching is not dependent on student demographics, but on ensuring the key elements for good teaching are available to all. The most impactful 'ingredients' for quality teaching are teaching staff who:

- are helpful and supportive;
- motivate students to do their best work; and
- clearly explain course goals and requirements.

Additional elements that students consistently cite as being indicators of good or very good value for money in relation to their teaching experience are teaching staff who:

- help them to explore their own interests;
- use lectures / teaching groups to guide and support independent study; and
- regularly initiate debates and discussions.

Twenty years of the HEPI / Advance HE *Student Academic Experience Survey* demonstrates that while teaching and assessment styles may adapt, ensuring teaching remains of the highest quality is integral to a positive student experience. The full impact of the large number of redundancies across the sector on teaching quality is yet to be seen and should be monitored through future iterations of the Survey.

In-person contact with teaching staff

'Too little in-person contact with teaching staff' and 'teaching staff not accessible' were strong predictors of a 'worse than expected experience' across two logistic regression models. Similarly, having 'a good level of in-person interaction with staff' is a predictor of a 'better than expected' experience. The report goes on to outline the importance of in-person interactions with staff above online interactions:

In-person interactions with teaching staff and with other students were the second and third most important factors affecting a 'better than expected' experience. Virtual / online interactions with other students were ranked fifth, above virtual / online interactions with teaching staff – ranked eighth out of nine items that remain statistically significant. This result suggests that in-person contact is valued more by students and contributes more to the positive experience than online contact.

The importance of in-person contact with teaching staff interlocks with the theme of belonging. Providers must think hard about how to curate community – especially given the complexities of community building in a post-COVID, social media-driven world – and how in-person teaching experiences can play an important part in this.

A sense of belonging

After analysing 20 years' worth of student experience data, the report concludes:

A strong sense of belonging and an inclusive campus are nearly as vital to students as teaching quality … This shows that a student's experience goes beyond course content: going to university is also about feeling part of a community.

In a world of convenience and increasingly digital interactions, connection still matters – both with teaching staff and to help build a sense of belonging in the student community. Students recognise this, but can they make the most of these opportunities? With a growing number of students living at home with family (and therefore facing longer commutes), balancing paid work and caring responsibilities, and being more likely to experience mental health challenges than previous cohorts, the student experience is changing. Providing these opportunities in a way that is encouraging, accessible and sensitive to these shifts is key. This report suggests that failure to do so may have an impact on how the higher education experience is perceived:

There are some signs that university life has become more about employment and less about education. The most recent Survey (2025) shows a slight drop in both perceived value for money and general satisfaction, which may point to the negative effects of financial stress in the higher education sector. This trend should be monitored in future iterations of the Survey.

What does this mean for the next 20 years of the student experience?

The future of the UK's higher education sector feels uncertain. The value of a degree is being questioned, there is

significant disquiet with the student loans system and political support for the sector feels fragile. The student body is also changing, with more students living at home with family than in flats with others or halls of residence. Students are working increasingly long hours in paid employment and the attendance gap is slowly increasing. The learning process itself is being reshaped, and the widespread use of AI raises fundamental questions about how students learn and how institutions assess that learning.[16]

Against this backdrop, the sector's core questions are becoming sharper rather than more complex. What does high-quality teaching look like in an era of flexibility, financial pressure and technological disruption? And how can universities foster meaningful human connection and a sense of belonging in an increasingly fragmented student experience?

While the context of higher education will continue to evolve, the foundations of a strong student experience remain remarkably consistent. High-quality teaching, in-person interactions and a strong sense of belonging are not only enduring principles – they are the anchors that will enable the sector to navigate the challenges ahead.

If the past two decades have shown us anything, it is that, while higher education may change rapidly, what students need to succeed changes more slowly. The task for the next 20 years is not to reinvent the student experience, but to protect and strengthen these core elements in a more complex and demanding environment.

Endnotes

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[3] 'Chart 1 – Students by level of study 2000/01 to 2024/25', Higher Education Statistics Agency, January 2026 https://www.hesa.ac.uk/data-and-analysis/students/chart-1#notes

[4] 'Chart 2 – Entrant students by level of study and mode of study 2005/06 to 2024/25', Higher Education Statistics Agency, January 2026 https://www.hesa.ac.uk/data-and-analysis/students/chart-2

[5] End of cycle data, UCAS, January 2025 https://www.ucas.com/data-and-analysis/undergraduate-statistics-and-reports/ucas-undergraduate-end-of-cycle-data-resources-2025 (Select Show Me: 'intention to live at home' and then 'all ages' and '18')

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[9] The 2024 and 2025 waves are not included in the analyses, as certain question options were removed from the Survey.

[10] This section has expanded over the years from two to five questions, hence the logistic regression model only looks at waves between 2022 and 2024.

[11] Chi-square test

[12] Students in further education colleges were included in the 2017 wave and onwards, but they are removed from the analyses in this section.

[13] Section 4.2 in the 2025 HEPI / Advance HE Student Academic Experience Survey report https://www.hepi.ac.uk/reports/student-academic-experience-survey-2025/

[14] Linear regression was used instead of a logistic regression because 'attendance' is a continuous variable (does not take yes / no values only).

[15] For more in-depth analyses see both Jonathan Neves et al, HEPI / Advance HE Student Academic Experience Survey 2025, June 2025 https://www.hepi.ac.uk/reports/student-academic-experience-survey-2025/ and Adrian Wright et al, Student Working Lives, HEPI Report 195, November 2025 https://www.hepi.ac.uk/wp-content/uploads/2025/11/Student-Working-Lives.pdf

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