

Evaluation of Aimhigher: Survey of Opportunity Bursary Applicants 2001/02: Preliminary Findings

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EXECUTIVE SUMMARY

Background

The Aimhigher programme was established in 2001 (when it was known as Excellence Challenge) with the aim of improving access to higher education for able young students from poorer backgrounds. The evaluation is being carried out on behalf of the Department for Education and Skills (DfES) by a Consortium comprising the National Foundation for Educational Research (NFER), the London School of Economics (LSE) and the Institute for Fiscal Studies (IFS).

The evaluation is multifaceted with a combination of quantitative and qualitative methods being used to evaluate the programme: large-scale surveys of students and tutors in schools and further education sector institutions; surveys of higher education providers; surveys of young people eligible for Opportunity Bursaries; interviews with Excellence Challenge coordinators and area-based studies of specific Challenge partnerships and higher education institutions. The overall aim of the evaluation is to explore the effectiveness of the Aimhigher programme in terms of the extent to which it appears to contribute to increasing and widening participation in higher education.

This report provides preliminary findings from the first survey of young people who were eligible for, and applied for Opportunity Bursaries to begin in 2001/02. Of the 126 higher education providers that were invited to participate in the survey, 84 (67 per cent) agreed to cooperate and in September 2002, 4,362 questionnaires were distributed by higher education providers to young people who had applied for Opportunity Bursaries; these included both successful and unsuccessful applicants. A total of 811 questionnaires were returned (representing a response rate of at least 19 per cent); of these, 592 were identified as coming from Opportunity Bursary (OB) recipients and 166 as from non-recipients. In addition, 47 young people had not commenced higher education or had left during the course of the first year. In six cases it was not possible to determine whether or not students had been allocated an Opportunity Bursary so they were excluded from the analyses reported. Key findings from the survey are presented below.

Characteristics of respondents

- ♦ Virtually all OB recipients and non-recipients reported having taken GCSEs and GCE A levels. The mean (and median) GCSE and GCE A level point scores were very similar for recipients and non-recipients.
- ♦ Of those students who had received OBs in 2001/02 and who provided relevant information 70 per cent were females and 30 per cent were males. The comparable figures for non-recipients were 73 and 27 per cent. The mean age of recipients on 1 October 2002 (at the beginning of their second

year of study) was 19.9 (median 19.7) and of non-recipients 20.2 (median 19.8).

- ◆ OB recipients and non-recipients were broadly similar in terms of their reported ethnic background. However, compared with applicants accepted for first degrees or higher national diploma (HND) courses in England, more students in our sample were from minority ethnic groups.
- ◆ At the time they applied for a place in higher education, 90 per cent of OB recipients reported that they had lived with their mother and 55 per cent with their father. The figures for non-recipients were similar (91 per cent and 61 per cent respectively). Just over half of the respondents reported that they had been living with both parents. A high proportion of both groups of respondents had thus lived in lone parent households.

Reasons for applying to higher education

- ◆ Reasons most frequently cited by students as being ‘important’ or ‘very important’ in relation to applying to university were: wanting to improve their career prospects; having a specific course that they wanted to pursue; wanting to broaden their horizons; and wanting to improve their earnings potential. These reasons were each seen as being important by at least nine out of ten respondents.
- ◆ Over eight out of ten students reported that they agreed with the statement ‘I was worried about getting into debt’. Significantly more non-recipients than recipients agreed with this statement. More non-recipients also agreed with the statements: ‘I knew that I would have to work whilst at university’ and ‘I was worried about combining studying with a job’. On the other hand, more OB recipients than non-recipients agreed with the statement, ‘I was confident that the long term financial benefits would outweigh the costs of doing the course’.
- ◆ Further analyses revealed that more females (and OB non-recipients) than males (and OB recipients) reported that they were worried about debt; knew they would have to work whilst studying; and were worried about combining work and study.

Influences on entering higher education

- ◆ Around nine out of ten students reported talking to their mother about higher education. High proportions of students also reported talking to school/college friends and teachers/college lecturers. Around seven out of ten reported talking to their tutor or form tutor, and to their father. No statistically significant differences emerged between the responses made by OB recipients and non-recipients.
- ◆ Respondents who indicated that they had talked to a given individual were also asked whether or not the individual in question had encouraged them to go into higher education. In the vast majority of cases, the people who young people talked to encouraged them to enter higher education. One statistically significant difference was found: more OB recipients than

non-recipients reported that their father encouraged them to enter higher education.

Activities and sources of information

- ♦ The most frequently reported activity undertaken in relation to entering higher education was attendance at university/higher education open days; this was mentioned by around three-quarters of OB recipients and non-recipients. Around eight out of ten of those who answered this question reported that university open days had affected their choice of higher education providers. It is important to note that participation in higher education related activities would have taken place in 2000/01 or earlier which was prior to the start of the Aimhigher (formerly Excellence Challenge) programme.
- ♦ Almost all students used university prospectuses or information provided by universities when initially deciding which higher education to apply to and/or which course to study. Other frequently used sources were the UCAS web-site and university web-sites, and school/college careers libraries. At least three-quarters of respondents who reported having used each source of information reported having found it helpful.

Higher education institution attended and qualifications

- ♦ Over a third of OB recipients (37 per cent) and non-recipients (34 per cent) reported attending pre-1992 institutions; 59 per cent and 64 per cent respectively reported attending post-1992 institutions; one per cent in each group were at 'other' higher education institutions; and three per cent of recipients and one per cent of non-recipients attended further education sector colleges. Compared with students nationally, more students in our sample were studying for combined degrees.

Attitudes towards higher education studies

- ♦ More OB non-recipients than recipients reported that they did not feel that they could afford to continue with their studies and that part-time work had interfered with their studies. However, similar proportions of bursary recipients and non-recipients reported that they had worked (49 per cent and 50 per cent respectively). The mean number of hours worked in a normal week was also similar for both groups of students – 12.9 hours (median 12.0) for recipients of Opportunity Bursaries and 13.3 hours (median 12.0) for non-recipients.

Financial situation

- ♦ Similar percentages of OB recipients and non-recipients reported having a bank overdraft facility – 81 per cent of Opportunity Bursaries recipients and 85 per cent of non-recipients. The mean amount of the overdraft at the end of the previous month was £603 for recipients and £730 for non-recipients. Levels of bank debt were also lower for those living at home in term time and those whose fathers had no qualifications.

- ◆ Similar percentages of OB recipients and non-recipients reported having a credit card. The mean balance at the end of the previous month was higher for non-recipients than for recipients, £586 versus £311.
- ◆ Similar proportions of recipients and non-recipients reported that they had applied for a student loan for the academic year 2001/02 (87 per cent versus 91 per cent). The mean amount of the student loan was similar in both groups.
- ◆ Students were asked if they received money from their family to help with living costs during the academic year 2001/02. Significantly fewer Opportunity Bursary recipients than non-recipients (16 per cent versus 30 per cent) reported that they had received such help.

Attitudes towards Opportunity Bursaries

- ◆ Nearly nine out of ten Opportunity Bursary recipients (85 per cent) reported that the OB had made them less worried about meeting the costs of going to university. Approximately half reported that the bursary had enabled them to continue studying, although six out of ten reported that it had had no influence on their decision to enter higher education. Around a third of Opportunity Bursary recipients reported that the bursary meant that they did not have to take up a part-time job and that the bursary enabled them to work fewer hours in a paid job than they would otherwise have had to.
- ◆ Over nine out of ten students who had not received Opportunity Bursaries reported that a bursary would have made them less worried about meeting the costs of going to university. Six out of ten reported that they would have worked fewer hours in a paid job if they had had a bursary and about two-fifths indicated that they would not have had to take up a part-time job.

Conclusions

- ◆ In spite of its relatively modest value, the Opportunity Bursary appears to have had a positive impact on recipients in terms of both students' attitudes and their financial situation. On the one hand, fewer OB recipients than non-recipients reported being worried about getting into debt; and fewer recipients were worried about combining studying with a job. On the other hand, more recipients than non-recipients were confident about the long-term benefits outweighing the costs of their studies; and fewer recipients than non-recipients reported feeling unable to continue with their studies on account of the costs. Students who had received Opportunity Bursaries reported lower levels of debt (bank overdraft and credit card balance) than non-recipients.
- ◆ The evidence from this survey suggests that the scheme met its objectives in terms of reaching the relevant target group and in terms of helping beneficiaries to meet the costs associated with higher education (and avoid some of the debt).

- ◆ There is also a suggestion that the Opportunity Bursary may have helped students view their higher education experience more positively than would otherwise have been the case. If this is borne out in subsequent research, it suggests that the introduction of the new Higher Education Grant from September 2004, will likewise have a positive effect in relation to those from disadvantaged groups who are currently under-represented in higher education.

1. INTRODUCTION

1.1 The Evaluation of Aimhigher

The evaluation of the Aimhigher programme is being carried out on behalf of the Department for Education and Skills (DfES) by a Consortium comprising the National Foundation for Educational Research, the London School of Economics and the Institute for Fiscal Studies.

The Aimhigher programme was established in 2001 (and was known at that time as Excellence Challenge) with the aim of improving access to higher education for able young students from poorer backgrounds. Its four strands aim:

- ♦ to develop partnerships between schools, colleges and higher education institutions in order to raise aspirations and attainment in Excellence in Cities (EiC) areas and Education Action Zones (EAZs) and so encourage greater progression to higher education (**Strand 1**);
- ♦ to increase funding to higher education institutions to reach out to more young people (**Strand 2**);
- ♦ to provide clearer information and better marketing of the route to higher education for young people (**Strand 3**);
- ♦ to pilot new forms of extra financial help through 26,000 Opportunity Bursaries to young people, each worth £2000 per student over three years (DfES, 2003a) (**Strand 4**);
- ♦ to ‘identify what works, for whom, and under what circumstances’ (DfES, 2003a) via an evaluation of the programme carried out by a Consortium comprising the National Foundation for Educational Research, the London School of Economics and the Institute for Fiscal Studies (**Strand 5**); and
- ♦ to provide payments, through the student associates pilot programme to undergraduates to do work in schools and further education colleges (**Strand 6**); the aim is that the undergraduates will provide role models for the young people concerned and help them to learn more about higher education (DfES, 2003b).

The Government White Paper ‘The Future of Higher Education’ (DfES, 2003c), announced that the coverage of the programme would be widened so that by 2006, 86 new local partnerships would be in place. In addition, the Excellence Challenge programme would be brought together with the Higher Education Funding Council for England (HEFCE) and Learning and Skills Council (LSC) Partnerships for Progression (P4P) initiative, which began in 2003, to deliver a coherent outreach programme, called ‘Aimhigher’. In 2003, HEFCE also announced changes to the way in which it funds universities for

widening participation activities, replacing the 'postcode premium' (see West *et al.*, 2003) with the widening participation allocation.

The evaluation is multifaceted with a combination of quantitative and qualitative methods being used to evaluate the programme. Methods include:

- ♦ large-scale surveys of students and tutors in schools and further education sector institutions, in order to provide information about such factors as activities undertaken as part of the Aimhigher programme and students' attitudes towards education; the information obtained from these surveys (combined with administrative data sources) will also be used to look at the impact of Aimhigher on attainment and progression;
- ♦ surveys of higher education providers to establish information about activities aimed at widening participation, and policies and practices in relation to access to higher education and perceived effectiveness;
- ♦ surveys of young people eligible for Opportunity Bursaries to ascertain their characteristics, financial circumstances and experiences;
- ♦ interviews with Aimhigher coordinators;
- ♦ area-based studies of specific partnerships and higher education institutions to explore policy and practice at a local level and the perceived effectiveness of the various strands of the programme.

The overall aim of the evaluation is to explore the effectiveness of the Aimhigher programme in terms of the extent to which it appears to contribute to increasing and widening participation in higher education. Whilst the quantitative methods will enable associations to be established between activities and outcomes, the qualitative methods will seek to explore the processes involved and identify practice that is perceived to be effective in terms of the overall programme aims.

This report focuses on **Strand 4** and provides preliminary findings from the first survey of young people who were eligible for, and applied for Opportunity Bursaries to begin in 2001/02.

1.2 The Survey of Opportunity Bursary applicants

At the end of the 2001/02 academic year, as part of the evaluation of the Aimhigher programme, a survey of young people who had applied for and were deemed eligible for Opportunity Bursaries was conducted. The intention was to seek the views of around a third of successful Opportunity Bursary (OB) applicants after they had completed the first year of their higher education programme, and an equivalent number of unsuccessful applicants. The overall aim of the survey was to gather information about the characteristics of the successful and unsuccessful applicants, their attitudes towards higher education, their financial situation, reasons for entering higher education and sources of information about higher education.

This report provides key findings that emerged from the survey. It also highlights a number of policy implications arising from the survey. An outline of the Aimhigher programme is given in Section 2. Section 3 provides an overview of the methods adopted and Section 4 presents key findings. Section 5 summarises the main issues that emerged.

2. THE AIMHIGHER PROGRAMME

The Aimhigher programme at the time the evaluation commenced, was for a duration of three years, beginning in September 2001. The programme builds on the widening participation strategy funded by the Higher Education Funding Council for England (HEFCE) (see Higher Education Consultancy Group (HECG) & National Centre for Social Research (NCSR), 2003). The aim of the programme is to increase and widen participation in higher education among young people, including the number of young people from poorer backgrounds, who apply for and enter higher education. Another key related aim is to improve the links between schools, colleges and universities. The programme is divided into four strands, as shown in Figure 1.

Figure 1. Strands of the programme

- ◆ **Strand 1** funds a range of activities in schools and colleges to provide the encouragement and support that young people need to increase attainment, raise aspirations and successfully apply to university.
- ◆ **Strand 2** provides extra money to universities and other higher education providers for summer schools, outreach work and to help institutions with the extra costs involved with supporting students who come from areas with low participation rates in higher education.
- ◆ **Strand 3**, the Young People's Publicity Campaign provides advice, information and promotes higher education to young people from disadvantaged backgrounds in a variety of ways.
- ◆ **Strand 4** provides extra financial support for students through 26,000 Opportunity Bursaries each worth £2,000 over three years.
- ◆ **Strand 5** is the evaluation of the programme; this is being carried out by a consortium comprising the National Foundation for Educational Research, the London School of Economics and the Institute for Fiscal Studies.
- ◆ **Strand 6** provides payments, through the student associates pilot programme to undergraduates to do work in schools and further education colleges; the aim is that they will provide role models for young people and help them to learn more about higher education.

Source: DfES (2003a; 2003b)

This report relates to **Strand Four**, the Opportunity Bursary scheme, which was a new initiative, providing certain eligible students with £2,000 over the course of three years with £1,000 given in the first year and payments of £500 made for the second and third years. Opportunity Bursaries are for young people from low income backgrounds with little or no family experience of higher education and aim to help these students meet the initial costs of starting a course in higher education, and to offer them some financial

confidence when applying for, and completing their studies in higher education (DfES, 2000). Opportunity Bursaries are allocated to all institutions with full-time undergraduates, and selected further education colleges providing higher education. For 2001/02 and 2002/03, the bursaries were to be allocated first of all to young people from state schools and colleges in Phase 1 and Phase 2 EiC areas and statutory EAZs, 'provided that the school or college is taking part in the Excellence Challenge programme, and is receiving funding to support this' (DfES, 2002b). In 2001/02, over 6,000 Opportunity Bursaries were allocated.

It is important to note that more Opportunity Bursaries were allocated to some providers than others. The number of Opportunity Bursaries allocated to higher education providers was in proportion to their numbers of full time students from 'low-participating neighbourhoods' (HEFCE, 2000). In 2001/02, 30 per cent were allocated to pre-1992 institutions, 65 per cent to post-1992 institutions, 1 per cent to 'other' higher education institutions (such as specialist colleges) and 4 per cent to six further education colleges providing higher education programmes.

3. METHODS

3.1 Procedure

A total of 126 higher education providers in England were approached. The institutions were selected in conjunction with the DfES and comprised all those higher education providers that had been allocated Opportunity Bursaries for students due to commence their studies at the beginning of the 2001/02 academic year. The Vice-Chancellors and Principals were advised, by letter, about the evaluation of the Opportunity Bursary scheme and of the Consortium's intention to contact the relevant person in their institution for their help with the survey (see **Annex A** for timetable). The contact staff were subsequently sent a letter asking for their assistance with the administration of this evaluation; they were asked to reply to the NFER if they were willing to take part and if so to supply the number of applicants, successful and unsuccessful, for whom they had names and addresses.¹ The intention was to approach a third of successful Opportunity Bursary applicants and a similar number of applicants, who although eligible, were unsuccessful.

The contact person in each institution that agreed to participate was subsequently sent a letter detailing the number of questionnaires that should be dispatched. They were advised that applicants were to be selected at random from amongst those who had applied for, were eligible for and had been successful in gaining an Opportunity Bursary to begin in the academic year 2001/02. Institutions were also asked to send out questionnaires to an equivalent number of students who had applied for and were eligible for Opportunity Bursaries, but who, because of the limited number of Opportunity Bursaries available had not been selected for the bursary. It was requested that these young people should be matched in terms of their gender and course with those who had been selected for the bursary; however, it is important to note that in some cases the demand for Opportunity Bursaries was not high enough to enable a matched sample to be selected.²

Questionnaires for distribution to Opportunity Bursary applicants were sent to the institutions in sealed pre-paid envelopes and included a letter to the young person concerned, which made it clear that responses would be treated in confidence. It was agreed that envelopes should be sent to students' home addresses.³ We were not able to ask higher education institutions to follow-up those who had been sent questionnaires as unsuccessful applicants could only have been contacted by post. Based on responses to our initial request for

¹ The NFER/LSE/IFS Consortium was informed that institutions had been advised by the DfES to keep records of young people who had applied for Opportunity Bursaries.

² No checks were made to ensure that methods recommended were adopted as this would have created an undue burden on institutions.

³ In some cases, at the request of the higher education provider, students were given the envelope by hand.

institutions to participate, it was felt that a request to send out an additional letter to all applicants, successful and unsuccessful, would have been an undue administrative burden on the institutions concerned.

3.2 Sample

Of the 126 institutions that were invited to participate in the survey, 84 (67 per cent) agreed to cooperate (ten refused⁴ and the remainder did not respond) and in September 2002, a total of 4,389 questionnaires were distributed to these providers; however, 27 were sent on the basis of incorrect information provided by an institution,⁵ leaving 4,362 questionnaires for distribution. A total of 811 questionnaires were returned representing a response rate of at least 19 per cent,⁶ which is not unusual for a postal survey without follow-up. **Annex B** gives more details on the nature of the sample compared with entrants to higher education programmes nationally.⁷

⁴ See **Annex A** for reasons given for non-participation by higher education providers.

⁵ The number of unsuccessful applicants provided by the institution included applicants ineligible for the Opportunity Bursary scheme on the basis of income.

⁶ It is not known precisely how many questionnaires were sent out as distribution was carried out by the institutions concerned.

⁷ Institutions were not asked to return information on the profiles of OB applicants (e.g. gender, ethnicity) to the DfES, nor were they asked to provide information relating to the characteristics of successful and unsuccessful applicants; thus, it is not possible to compare the sample achieved in the survey with the population of OB applicants, successful or unsuccessful.

4. KEY FINDINGS

It is important to note that some of those surveyed did not enter higher education and have been excluded from the analysis. Of the 811 questionnaires returned, 592 were identified as coming from Opportunity Bursary (OB) recipients and 166 as coming from non-recipients. These students had started the first year of their programme. In addition, 47 young people had not commenced higher education or had left ('dropped out') during the course of the first year.⁸ In six cases it was not possible to determine whether or not students had been allocated an Opportunity Bursary⁹ so they were excluded from the analyses reported below, which relate to 592 recipients and 166 non-recipients of Opportunity Bursaries.

The following section presents the main findings to emerge from the survey. Each sub-section provides information on those young people who **were recipients** of Opportunity Bursaries to begin in the academic year 2001/02 and those who were **non-recipients**. Our focus is on those young people who started their studies in higher education in the autumn term 2001/02 and who had completed the first year of their programme.

The following sections explore the characteristics of the Opportunity Bursary applicants; reasons for wanting to enter higher education; influences on the decision to enter higher education; the programme of study applied for; attitudes towards higher education study and support received; and students' financial situation.

4.1 Characteristics of Opportunity Bursary applicants

Academic qualifications

Virtually all (99 per cent) OB recipients and non-recipients reported having **taken** General Certificate of Secondary Education examinations (GCSEs), and 98 per cent reported having taken General Certificate of Education Advanced (GCE A) levels.¹⁰ Almost all (98 per cent and 99 per cent of recipients and non-recipients respectively) reported **GCSE results**. The mean GCSE point score¹¹ was very similar for recipients (N=583) and non-recipients (N=164)

⁸ For the purposes of this report young people who reported that they had not commenced higher education or had left higher education before June 2002 were excluded from the analysis. For further details see **Annex C**.

⁹ The key question used to select successful and unsuccessful applicants had not been completed.

¹⁰ 37 per cent of recipients and 42 per cent of non-recipients reported having taken GCE AS levels. A minority of recipients and non-recipients reported having taken a foundation level General National Vocational Qualification (GNVQ) (26 per cent and 23 per cent respectively); an intermediate level GNVQ (25 per cent versus 22 per cent); or an advanced level GNVQ (18 and 15 per cent respectively).

¹¹ One GCSE at grade A* was awarded 8 points, grade A 7 points, grade B 6 points and so on.

(57.3 versus 58.5) as was the median (58.0 versus 59.0).¹² The difference between GCSE point score for recipients and non-recipients was not statistically significant; in neither group were there any statistically significant differences between males and females.¹³

82 per cent of recipients and 81 per cent of non-recipients reported GCE A/AS level results. The mean GCE A level point score¹⁴ was very similar for Opportunity Bursary recipients (N=489) and non-recipients (N=134) (20.3 versus 21.8) as was the median (20.0 versus 22.0).¹⁵ The difference between the A/AS level point score for recipients and non-recipients was not statistically significant. In neither group were there any statistically significant differences between males and females.

Individual characteristics

Of those students who had received OBs in 2001/02 and who provided relevant information (N=590), 70 per cent were females and 30 per cent were males.¹⁶ The comparable figures for non-recipients were 73 and 27 per cent (N=165). The mean age of recipients on 1 October 2002 (at the beginning of their second year of study) was 19.9 (median 19.7) and of non-recipients 20.2 (median 19.8). This difference was not statistically significant.

As shown in Table 1, OB recipients and non-recipients were broadly similar in terms of their reported ethnic background.¹⁷ However, compared with applicants accepted for first degrees or higher national diploma (HND) courses in England (see Annex B), more students in our sample were from minority ethnic groups.

¹² Excluding GNVQs.

¹³ All differences reported to be statistically significant are significant at the 0.05 level or beyond (using independent t-tests, chi-squared tests or multiple regression as relevant).

¹⁴ A levels points were calculated using the former tariff system whereby one A level at grade A was awarded 10 points, grade B 8 points and so on. For AS levels the points were halved.

¹⁵ GNVQs, which were taken by a minority of students, were excluded.

¹⁶ It was not possible to establish if this distribution was representative as no national data were available on the allocation of OBs to males and females; however, it appears on the basis of other research studies that more females than males tend to respond to surveys such as this (see West *et al.*, 2000).

¹⁷ See **Annex B** for comparison with UCAS 'home' applicants accepted for entry in 2001.

Table 1. Ethnic background of students with and without Opportunity Bursaries

Ethnic background	% OB recipients (N=589)	% OB non- recipients (N=163)
Asian or British Asian – Bangladeshi	4	4
Asian or British Asian – Indian	8	7
Asian or British Asian – Pakistani	7	4
Asian or British Asian – Chinese/Other	4	4
Black or Black British – African/Caribbean/Other	5	6
Mixed – African/Asian/Caribbean/Other	4	4
White – British/Irish/Other	69	70
Other ethnic group	0	2

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents answered all questions. Percentages do not always equal 100 because of rounding.

Home background

At the time they applied for a place in higher education, 90 per cent of OB recipients (N=590) reported that they had lived with their mother and 55 per cent with their father. The figures for non-recipients (N=166) were similar (91 per cent and 61 per cent respectively). (See also **Annex E.**) Just over half of the respondents (51 per cent of recipients and 55 per cent of non-recipients) reported that they had been living with both parents. A high proportion of both groups of respondents had thus lived in lone parent households.

Respondents were asked about the employment status of the adults with whom they lived when they had applied for higher education. Of those OB recipients (N=326) and non-recipients (N=101) who reported that they had been living with their father, 47 per cent and 59 per cent respectively reported that he had been in full-time employment, 5 per cent and 9 per cent respectively that he had been in part-time employment and 46 per cent and 29 per cent respectively that he had not been in work (no information was available for 2 and 3 per cent of the fathers respectively). Of the recipients (N=161) and non-recipients (N=65) whose fathers had been in work, 31 per cent and 42 per cent respectively were reported to have been in non-manual occupations; the majority were in manual occupations (69 and 58 per cent respectively).

Of those OB recipients who reported that they had been living with their mother (N=532) and comparable non-recipients (N=151), 31 per cent and 35 per cent respectively reported that their mother had been in full-time employment; 25 per cent and 31 per cent respectively that she had been in part-time employment and 43 per cent and 32 per cent respectively that she had not been in work (no information was available for 2 and 3 per cent respectively). Of those whose mothers were in work, 60 per cent of recipients (N=282) and 66 per cent of non-recipients (N=94) respectively were reported

to have been in non-manual occupations with the remainder having been in manual occupations (40 and 34 per cent respectively).¹⁸

The percentage of families where both parents were in full-time work was 7 per cent (N=592) for OB recipients and 12 per cent (N=166) for non-recipients (this difference was statistically significant). The percentage of households where one parent was working full-time and one part-time was 8 per cent (N=592) for OB recipients and 13 per cent (N=166) for non-recipients (this difference was not statistically significant).

As noted above, Opportunity Bursaries were designed for young people from low-income backgrounds with 'little or no family experience of higher education'. So, turning to qualifications of the young person's parents, we asked about the qualification levels of their mother (or step-mother) and father (or step-father). Table 2 provides the highest educational level of the mother (excluding step-mother or father's partner) for OB recipients and non-recipients. As can be seen, the majority of the applicants' mothers did not have an undergraduate or postgraduate degree.¹⁹

Table 2. Highest educational level of mother

Highest qualification	% OB recipients (N=476)	% OB non-recipients (N=143)
None	40	29
GCE O levels or equivalent ²⁰	33	36
GCE A levels	8	9
Professional qualification	12	13
Undergraduate	6	8
Postgraduate	1	4

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents answered all questions. Percentages do not always equal 100 because of rounding.

Table 3 provides the highest educational level of the father (excluding step-father or mother's partner) for Opportunity Bursary recipients and non-recipients. As can be seen, the majority of the applicants' fathers did not have an undergraduate or postgraduate degree, in accordance with the eligibility criteria for Opportunity Bursaries.²¹

¹⁸ The category of 'sales' was classified as non-manual.

¹⁹ See **Annex D** for guidance on eligibility criteria for Opportunity Bursaries for students entering higher education in 2001/02.

²⁰ General Certificate of Education Ordinary (GCE O) levels and Certificate of Secondary Education (CSE) qualifications were replaced by the General Certificate of Secondary Education (GCSE) in 1988.

²¹ See **Annex D**.

Table 3. Highest educational level of father

Highest qualification	% OB recipients (N=344)	% OB non-recipients (N=112)
None	46	37
GCE O levels or equivalent	28	32
GCE A levels	8	8
Professional qualification	5	12
Undergraduate	9	6
Postgraduate	4	5

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents were able to provide details. Percentages do not always equal 100 because of rounding.

Nearly half of OB recipients (48 per cent) and over a third of non-recipients (37 per cent) reported that they lived with their parents during term time. This difference was statistically significant – in short, more recipients than non-recipients lived at home with their parents during term time.

4.2 Reasons for wanting to enter higher education

In order to find out students' reasons for wanting to enter higher education, they were presented with a list of reasons young people might give for continuing to study after leaving school/college. They were asked when they initially applied to go on to higher education whether the statement in question was 'not at all important', 'not important', 'important' or 'very important'. The percentage of students who reported that each statement was 'very important' or 'important' is given in Table 4.

Table 4. 'Very important' and 'important' reasons for applying to higher education

Reason	% OB recipients (N=545-584)	% OB non-recipients (N=151-165)
I wanted to improve my career prospects	98	97
I wanted to broaden my horizons	93	96
I had a specific course that I wanted to study	92	93
I wanted to improve my earnings potential	90	90
I knew that I wanted to continue studying	88	90
I had always intended to go on to university/higher education	85	86
I wanted to meet new people	83	85
I wanted to experience university life	79	79
I wanted to become more independent	77	77
I had a specific career that I wanted to pursue	77	77
I particularly wanted to study at one of the institutions I applied to	71	73
I particularly wanted to live in the city/town where the institution is based	32*	42*
I was unsure about what to do, so I continued studying	26	28
I wanted to delay getting a full-time job	20	16

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents answered all questions. Figures in bold and asterisked signify that the difference between OB recipients and non-recipients is statistically significant at the 0.05 level or beyond using chi-squared analyses.

Reasons most frequently cited by students as being 'important' or 'very important' in relation to applying for university were: wanting to improve their career prospects; having a specific course that they wanted to pursue; wanting to broaden their horizons; and wanting to improve their earnings potential. These reasons were each seen as being important by at least nine out of ten respondents. Only one statistically significant difference emerged between OB recipients and non-recipients, with more non-recipients reporting that they particularly wanted to live in the city/town where the institution was based.

For OB recipients, the most frequently reported 'very important' reasons given for applying to higher education are shown in Table 5.

Table 5. 'Very important' reasons for applying to higher education

Reason	% OB recipients (N=573-584)	% OB non-recipients (N=161-165)
I wanted to improve my career prospects	69	63
I wanted to improve my earnings potential	58	57
I had always intended to go on to university/higher education	49	45
I knew that I wanted to continue studying	47	53
I wanted to broaden my horizons	46	48

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents answered all questions.

As shown in Table 5, around two-thirds of respondents cited wanting to improve their career prospects as a 'very important' reason for applying to higher education; and over half cited wanting to improve their earnings potential as a 'very important' reason.

Respondents were also asked about some of the issues that people might think about in relation to going on to higher education (HE). They were presented with a series of statements and asked how much each statement applied to them, in terms of the extent to which they agreed or disagreed, when they applied to enter higher education. Table 6 and Figure 2 give the percentage of OB recipients and non-recipients who reported that they 'agreed' or 'strongly agreed' with each statement.

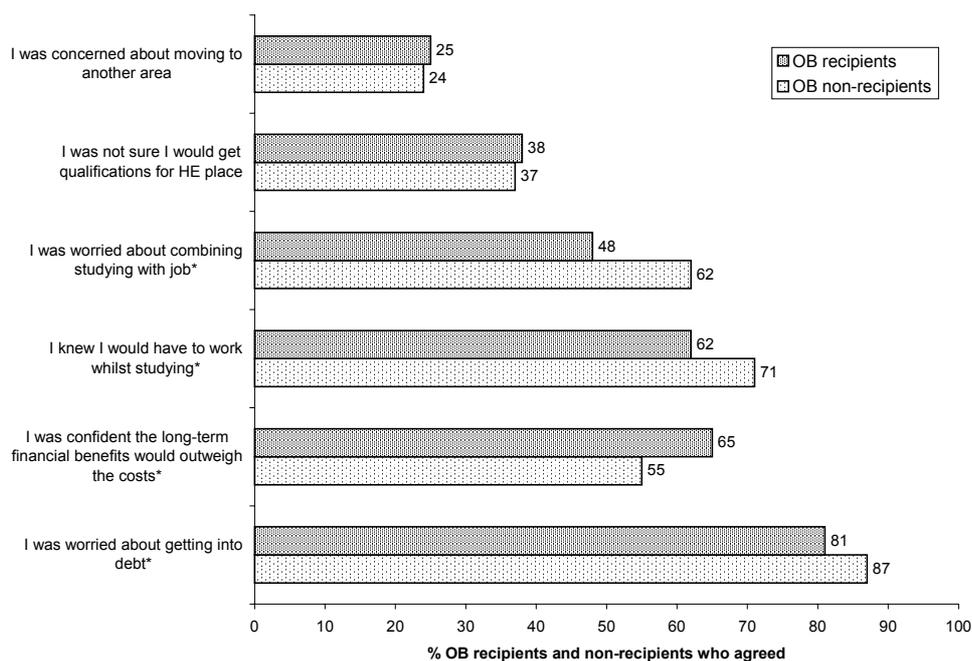
Table 6. Percentage of students agreeing with statements about higher education

Views about higher education	% OB recipients (N=566-585)	% OB non-recipients (N=160-165)
I was worried about getting into debt	81*	87*
I was confident that the long term financial benefits would outweigh the costs of doing the course	65*	55*
I knew that I would have to work whilst at university/HE institution	62*	71*
I was worried about combining studying with a job	48*	62*
I was not sure if I would get high enough qualifications to get a place at university/ HE institution	38	37
I was concerned about moving to another area	25	24

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents answered all questions. Figures in bold and asterisked signify that the difference between OB recipients and non-recipients is statistically significant at the 0.05 level or beyond using chi-squared analyses.

As can be seen from Table 5 and Figure 2, over eight out of ten students reported that they agreed with the statement ‘I was worried about getting into debt’; significantly more non-recipients than recipients agreed with this statement. More non-recipients also agreed with the statements: ‘I knew that I would have to work whilst at university’ and ‘I was worried about combining studying with a job’. On the other hand, more OB recipients than non-recipients agreed with the statement, ‘I was confident that the long term financial benefits would outweigh the costs of doing the course’.

Figure 2. Attitudes towards higher education



* The difference between OB recipients and non-recipients is statistically significant.

Given that the sample of respondents was predominantly female, we also examined whether a student’s gender was independently associated with attitudes towards higher education; we found significant independent associations between each of the predictor variables (gender and OB receipt/non-receipt) and the dependent variables investigated (see **Annex E** for technical details):

More females (than males) and OB non-recipients (than recipients) reported that they

- ◆ were worried about debt;
- ◆ knew they would have to work whilst studying;
- ◆ were worried about combining work and study.

More males (than females) and OB recipients (than non-recipients) indicated that they

- ♦ were confident that the long-term financial benefits would outweigh the costs of doing the course.

4.3 Influences on decision to enter higher education

Influence of others

Respondents were asked who they had talked to when they were thinking about whether or not to enter higher education. Table 7 gives their responses.

Table 7. Individuals students talked to about higher education

Talked to...	% OB recipients (N=592)	% OB non-recipients (N=166)
Mother	92	90
School/college friends	89	88
Teacher/college lecturer	87	89
Tutor/form tutor	74	69
Father	70	74
Brother or sister	56	58
Friends who had gone into higher education	52	57
Other family member (aunt, uncle, grandparent, cousin)	51	54
Careers adviser/personal adviser/Connexions adviser	49	53
Students currently in higher education	41	42
Staff working in higher education	21	21
Step-father (or mother's husband or partner)	9	13
Step-mother (or father's wife or partner)	6	9
Youth worker	4	5
Other (e.g. boyfriend, counsellor, professional)	3	5

Around nine out of ten students reported talking to their mother about higher education. High proportions of students also reported talking to school/college friends and teachers/college lecturers. Around seven out of ten reported talking to their tutor or form tutor, and to their father. No statistically significant differences emerged between the responses made by OB recipients and non-recipients.

Respondents who indicated that they had talked to a given individual were asked whether or not the individual in question had encouraged them to enter

higher education. Table 8 gives the results (this relates to those individuals at least 20 per cent of respondents had talked to (as shown in Table 7)).

Table 8. Individuals talked to who encouraged entry to higher education

Talked to...	Individual encouraged % OB recipients (N=116 to 542)	Individual encouraged % OB non-recipients (N=34 to 147)
Mother	90	89
School/college friends	89	91
Teacher/college lecturer	96	96
Tutor/form tutor	95	95
Father	91*	82*
Brother or sister	83	87
Friends who had gone into higher education	94	93
Other family member (aunt, uncle, grandparent, cousin)	88	91
Careers adviser/personal adviser/Connexions adviser	86	87
Students currently in higher education	93	90
Staff working in higher education	90	94

Figures in bold and asterisked signify that the difference between OB recipients and non-recipients is statistically significant at the 0.05 level or beyond using chi-squared analyses.

In the vast majority of cases, the individuals young people talked to encouraged them to enter higher education. One statistically significant difference was found, with more OB recipients than non-recipients reporting that their father encouraged them to enter higher education.

Activities concerned with university/higher education

Students were then asked about activities that they had undertaken to do with higher education. They were presented with a list of activities and asked if they had participated in each. Table 9 provides their responses.

Table 9. Participation in activities related to entry to higher education

Activities	% OB recipients (N=592)	% OB non- recipients (N=166)
University/HE open day	74	75
Visits to my school/college by staff working in HE	28	33
Visits to my school/college by HE students	20*	28*
Revision classes run by university/HE provider	15	15
Summer or winter school at university/HE provider	10	11
Shadowing an HE student	5	8
Mentoring by a university/HE student	5	3
Tutoring by a university/HE student	5*	10*
Saturday school at university/HE provider	3	6
Other activity (UCAS fair, residential visit)	4	4

Figures in bold and asterisked signify that the difference between OB recipients and non-recipients is statistically significant at the 0.05 level or beyond using chi-squared analyses.

As can be seen, the most frequently reported activity was university/higher education open days; this was mentioned by around three-quarters of students in both groups. Far smaller proportions of students mentioned other activities. Only two statistically significant differences were found, with more OB non-recipients than recipients reporting visits to their school/college by students in higher education and more reporting that they had been tutored by a university student.

We asked respondents whether any of these activities had affected their choice of higher education provider. The responses are given in Table 10.

Table 10. Activities affecting choice of higher education providers

	Affected choice % OB recipients (N=217)	Affected choice % OB non-recipients (N=82)
University/HE open day	84	81
Visits to my school/college by staff working in HE	8	13
Visits to my school/college by HE students	8	16
Revision classes run by university/HE provider	4	4
Summer or winter school at university/HE provider	6	5
Shadowing an HE student	2	5
Mentoring by a university/HE student	1	0
Tutoring by a university/HE student	2	1
Saturday school at university/HE provider	2	2
Other activity (UCAS fair, residential visit)	5	0

N is less than 592 and 166 for OB recipients and non-recipients as only those who participated in activities were asked if these had affected their choice of higher education provider. In addition, not all respondents answered all questions.

Around eight out of ten respondents in both groups, who answered this question, reported that university open days had affected their choice of higher education providers. Very small percentages of respondents mentioned that the other activities had affected their choice. In this context it is important to note that participation in higher education related activities would have taken place in 2000/01 or earlier which was prior to the start of the Aimhigher (formerly Excellence Challenge) programme.

Respondents were asked about the sources of information they had used when initially deciding which university/higher education institution to apply to and/or which course to study. They were presented with a list of different sources and asked which they had used. Table 11 gives their responses.

Table 11. Sources of information used

Sources of information used	% OB recipients (N=592)	% OB non-recipients (N=166)
University prospectus/information from university/HE provider	97	99
UCAS web-site	60	61
School/college careers library	58	64
University/higher education institution web-site	57	61
‘Good universities guide’	27	31
Careers service/Connexions	16*	22*
Department for Education and Skills (DfES) web-site	3	5
Higher Education Funding Council (HEFCE) web-site	1	2
Other web-sites	1	3
Other (tutors, open days)	7	9

Figures in bold and asterisked signify that the difference between OB recipients and non-recipients is statistically significant at the 0.05 level or beyond using chi-squared analyses.

As can be seen, almost all students used university prospectuses or information provided by universities. Other frequently used sources were the UCAS web-site and university web-sites, and school/college careers libraries. Fewer OB recipients than non-recipients reported using the careers service/Connexions as a source of information; this difference was statistically significant.

We also asked whether the information had proved helpful. Table 12 provides the percentages of OB recipients and non-recipients who had used each source of information and indicated that they had found it helpful (only sources of information mentioned by over ten per cent of respondents are presented).

Table 12. Helpfulness of information used

Sources of information used	Information helpful % OB recipients (N=92 to 574)	Information helpful % OB non-recipients (N= 37 to 165)
University prospectus/information from institution	91	95
University/higher education institution web-site	84	87
‘Good universities guide’	84	89
School/college careers library	83	83
UCAS web-site	80	76
Careers service/Connexions	77	81

Ns are less than 592 and 166 for OB recipients and non-recipients as table relates to those respondents who reported using each source of information.

At least three-quarters of respondents who reported having used each source of information found it helpful. As can be seen, similar proportions of OB

recipients and non-recipients indicated that they had found the information they had used helpful.

4.4 Higher education institution and qualifications

Forty per cent of OB recipients had **applied** to a pre-1992 institution for an Opportunity Bursary, 58 per cent to a post-1992 institution, 1 per cent to 'other' higher education institutions (such as specialist colleges) and 2 per cent to further education colleges. Thirty-six per cent of non-recipients had applied to a pre-1992 institution, 63 per cent to a post-1992 institution and 1 per cent to a further education college. A small percentage of respondents (6 and 7 per cent of recipients and non-recipients respectively) indicated that they had changed institution. For recipients (non-recipients in parentheses), the final percentages were 37 per cent attending pre-1992 institutions (34 per cent); 59 per cent post-1992 institutions (64 per cent); 1 per cent 'other' higher education institutions (1 per cent); and 3 per cent further education sector colleges (1 per cent).

Respondents were asked for details of the programmes that they had applied for. As can be seen from Table 13 nearly half the students in both groups had applied for a BA degree, around one in three had applied for a BSc programme with smaller proportions having applied for other degrees or diplomas.

Table 13. Programme applicants applied for

Programme applied for	% OB recipients (N=585)	% OB non-recipients (N=163)
BA	48	47
BSc	32	29
LLB	6	2
HND	4	4
Other (BEng, BMus, BEd, MBBS, combined etc.)	10	18

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents answered all questions. BA is Bachelor of Arts, BSc Bachelor of Science, LLB Bachelor of Laws, HND Higher National Diploma, BEng Bachelor of Engineering, BMus Bachelor of Music, BEd Bachelor of Education, MBBS Bachelor of Medicine and Bachelor of Surgery.

Students were also asked which subject they had applied to study; as shown in Table 14 the highest proportion of students was studying more than one subject. Compared with students nationally, more students in our sample were studying for combined degrees (see **Annex B**).

Table 14. Subjects students applied to study

Subject	% OB recipients (N=586)	% OB non-recipients (N=161)
Social studies, law, business studies, mass communication	22	18
Medical sciences, subjects allied to medicine, biological and veterinary sciences	16	13
Physical sciences, mathematics, computer sciences, engineering, technologies, architecture	16	17
Linguistics, languages, literature, historical and philosophical studies, education	8	7
Creative arts and design	10	18
Combined subjects	27	27

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents answered all questions. Percentages do not always equal 100 because of rounding.

4.5 Attitudes towards higher education studies and support

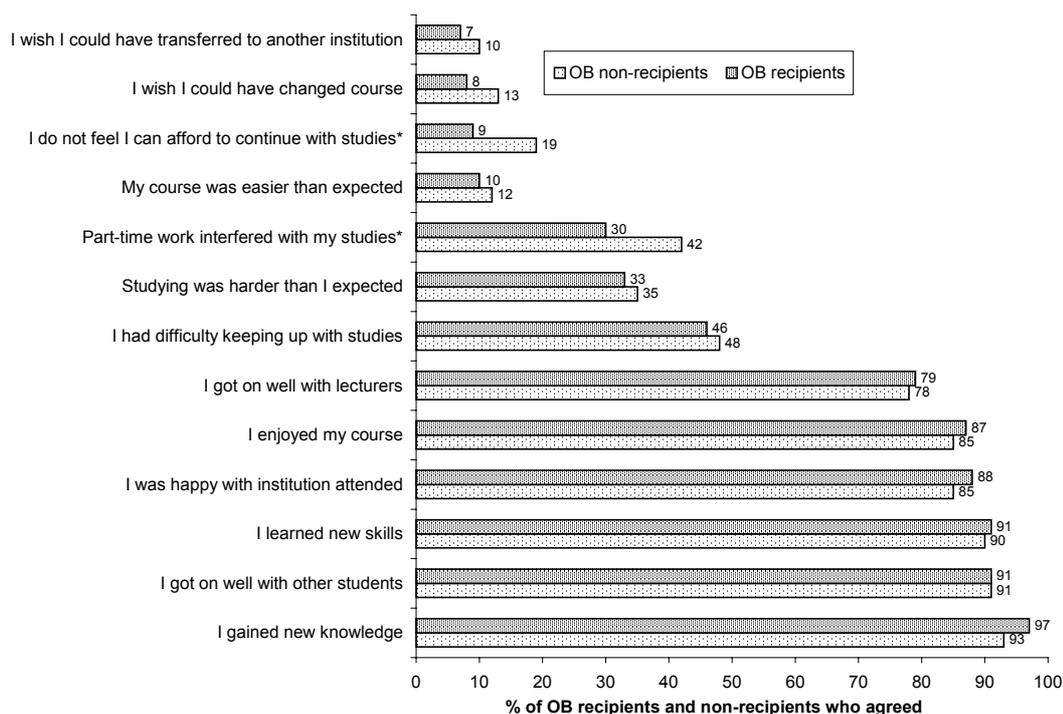
A series of questions was asked to find out about students' experiences of higher education in their first year and the support that they had received. Respondents were presented with a series of statements in order to establish their views about their educational studies during 2001/02 and were asked whether they agreed or disagreed with each one. They were given the following options for each statement: 'strongly disagree', 'disagree', 'neither agree nor disagree', 'agree' or 'strongly agree'. Table 15 and Figure 3 give the percentage of respondents who reported that they 'agreed' or 'agreed strongly' with these statements (see **Annex E** for the percentage who 'disagreed' or 'disagreed strongly' with these statements).

Table 15. Views about higher education studies – agree with statements

Statement...	% OB recipients (N=549-581)	% OB non-recipients (N=156-164)
I feel that I gained new knowledge	97	93
I got on well with other students	91	91
I feel that I learned new skills	91	90
I was happy with the institution I attended	88	85
I enjoyed my course	87	85
I got on well with my teachers/lecturers	79	78
Sometimes I had difficulty keeping up with my studies	46	48
Studying was harder than I expected	33	35
I feel that part-time work interfered with my studies	30*	42*
My course was easier than I expected	10	12
I do not feel that I can afford to continue with my studies	9*	19*
I wish I could have changed the course I was studying	8	13
I wish I could have transferred to another institution	7	10

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents answered all questions. Figures in bold and asterisked signify that the difference between OB recipients and non-recipients is statistically significant at the 0.05 level or beyond using chi-squared analyses.

Figure 3. Views about higher education studies



*The difference between OB recipients and non-recipients is statistically significant.

As can be seen in Table 15 there were two statistically significant differences between Opportunity Bursary recipients and non-recipients. More OB non-recipients than recipients reported that they did not feel that they could afford to continue with their studies. In a similar vein (see **Annex E**), more recipients than non-recipients disagreed with the statement ‘I do not feel that I can afford to continue with my studies’ (62 per cent versus 43 per cent).

Table 15 also shows that more students without bursaries reported that part-time work had interfered with their studies. However, it is interesting to note that when students were asked whether they worked in a part-time job during term time, similar proportions of bursary recipients and non-recipients reported that they had worked (49 per cent and 50 per cent respectively). The mean number of hours worked in a normal week was also similar for both groups of students – 12.9 hours (median 12.0) for recipients of Opportunity Bursaries (N=269) and 13.3 hours (median 12.0) for non-recipients (N=80).

Students were then asked about the support that they had received at their institution during 2001/02. Their responses are given in Table 16.

Table 16. Support received by students

Support received	Received support % OB recipients (N=592)	Received support % OB non-recipients (N=166)
Support from my individual tutor	57	63
Support from an academic member of staff	47	48
Financial support	39	31
Support by another student(s) (e.g. mentoring)	21*	31*
Financial advice	16	16
Support from student union (e.g. welfare staff)	10*	18*
Counselling	6	10
Other (e.g. family, friends, other HE staff)	3	4

Figures in bold and asterisked signify that the difference between OB recipients and non-recipients is statistically significant at the 0.05 level or beyond using chi-squared analyses.

As can be seen, around six out of ten students reported receiving support from their individual tutor and just under half reported support from an academic member of staff. Around a third of students reported receiving financial support. Two statistically significant differences were found – more non-recipients reported receiving support (such as mentoring) from another student, and more reported receiving support from the student union. The reasons for these differences are not clear.

The vast majority of students found the support that they received helpful as shown in Table 17 (only those forms of support received by at least ten per cent of respondents are reported).

Table 17. Helpfulness of support received

Support received	Found support helpful % OB recipients (N=56 to 320)	Found support helpful % OB non-recipients (N=23 to 101)
Financial support	96*	79*
Support from an academic member of staff	94*	84*
Financial advice	89*	39*
Support by another student(s) (e.g. mentoring)	87	77
Support from my individual tutor	86	80
Support from student union (e.g. welfare staff)	82	64

N is less than 592 and 166 for OB recipients and non-recipients as this table only relates to those who received support. Figures in bold and asterisked signify that the difference between OB recipients and non-recipients is statistically significant at the 0.05 level or beyond using chi-squared analyses.

There were three statistically significant differences between students in the two groups in terms of the support received – more recipients than non-recipients reported that support from an academic member of staff was helpful, that financial support was helpful and financial advice was helpful. Again, it is not clear why these differences were observed; however, one possibility is that recipients were in fact referring to the financial support received via the Opportunity Bursary.

4.6 Financial situation

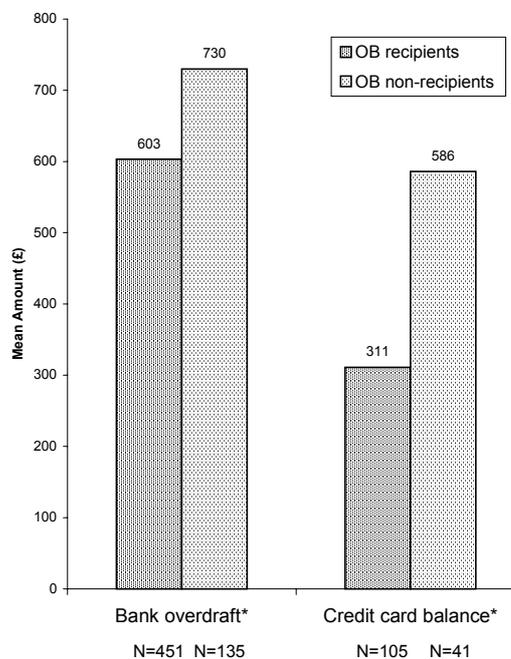
Respondents were asked a series of questions about their financial situation. Similar percentages of students in both groups reported having a bank overdraft facility – 81 per cent of Opportunity Bursaries recipients (N=588) and 85 per cent of non-recipients (N=165). The mean amount of the overdraft for these students at the end of the previous month was £603 (N=451) for recipients and £730 (N=135) for non-recipients of Opportunity Bursaries (see Figure 4). This difference was statistically significant.²² In short, OB non-recipients had significantly higher levels of bank overdraft debt than recipients. Further analysis revealed that lower levels of debt were also independently associated with living at home in term time and having a father with no qualifications (for more details see **Annex E**).

Similar percentages of Opportunity Bursary recipients and non-recipients reported having a credit card – 42 per cent of recipients (N=587) and 49 per cent of non-recipients (N=165). Around half of the students (52 per cent of recipients and 45 per cent of non-recipients) reported paying off the whole balance each month (this difference was not statistically significant). For

²² There was no statistically significant difference between males and females.

those who did not pay off the whole balance each month, the mean balance at the end of the previous month was higher for non-recipients (N=41) than for recipients (N=105) – £586 versus £311. This difference was statistically significant. (See also Figure 4.)

Figure 4. Levels of bank and credit card debt



* The difference between OB recipients and non-recipients is statistically significant.

Similar proportions of recipients and non-recipients reported that they had applied for a student loan for the academic year 2001/02 (87 per cent versus 91 per cent). The mean amount of the student loan was similar in both groups (£4,637 for Opportunity Bursary recipients (N=484) compared with £4,594 for non-recipients (N=146)).

Students were asked if they had received money from their family to help with living costs during the academic year 2001/02. Significantly **fewer** students who had received an Opportunity Bursary than those who had not (16 per cent versus 30 per cent) reported that they had received such help. The amount per week was lower for Opportunity Bursary recipients than for non-recipients (mean of £26 (N=80) versus £35 (N=43) per week respectively; median £20 versus £25 respectively).²³

Students were asked whether they had worked in a part-time job during term-time between September 2001 and July 2002. Similar proportions of Opportunity Bursary recipients and non-recipients (49 per cent and 50 per cent respectively) reported that they had. The mean number of hours worked in a normal week was similar – 12.9 hours (median 12.0) for recipients of Opportunity Bursaries (N=269) and 13.3 hours (median 12.0) for non-recipients (N=80). The mean amount earned per hour was £5.15 per hour for

²³ This difference just failed to reach statistical significance (p=0.055).

recipients (N=269) and £6.31 for non-recipients (N=77). (Neither of these differences was statistically significant.)

Respondents were also asked about any other financial support that they had received. The results are shown in Table 18. As can be seen, relatively few students reported other forms of financial support.

Table 18. Financial support reported by students

Financial support...	% OB recipients (N=592)	% OB non- recipients (N=166)
Own savings	14	15
Hardship/bursary award from university/higher education institution	8	12
Scholarship from a charitable foundation	3	4
Scholarship from institution	1	1
Other (e.g. NHS bursary, bank overdraft)	4	7

One of the aims of the Opportunity Bursary scheme was for the bursary to help students meet some of the costs of starting and continuing their studies in higher education. We therefore asked Opportunity Bursary recipients whether or not they felt that certain statements were 'true', 'false' or 'not relevant'. The percentages of students reporting that each statement was 'true' are shown in Table 19.

Table 19. Percentages of OB recipients reporting statements to be true

Statement...	% (N=592)
Obtaining the Opportunity Bursary made me less worried about meeting the costs of going to university/higher education institution	85
The Opportunity Bursary had no influence on my decision to enter higher education	61
The Opportunity Bursary enabled me to continue studying	52
Receiving the Opportunity Bursary enabled me to attend the university/higher education institution I wanted to go to	40
The Opportunity Bursary meant that I worked fewer hours in a paid job than I would otherwise have had to	35
The Opportunity Bursary meant that I did not have to take up a part-time job	31
Receiving the Opportunity Bursary enabled me to live away from home	29
Receiving the Opportunity Bursary enabled me to study the subject I wanted to	29

As can be seen from Table 19, a high proportion of students reported that having an Opportunity Bursary had made them less worried about meeting the costs of going to university. Approximately half reported that the bursary had

enabled them to continue studying, although around six out of ten reported that it had had no influence on their decision to enter higher education. Around a third of Opportunity Bursary recipients reported that the bursary meant that they did not have to take up a part-time job (31 per cent) and that the bursary enabled them to work fewer hours in a paid job than they would otherwise have had to (35 per cent).

Students who had not received an Opportunity Bursary were also asked whether or not they felt a similar set of statements to be 'true', 'false' or 'not relevant'. The percentages of students reporting each statement to be 'true' are presented in Table 20.

Table 20. Percentages of OB non-recipients reporting statements to be true

Statement...	% (N=166)
Obtaining an Opportunity Bursary would have made me less worried about meeting the costs of going to university/higher education institution	92
With an Opportunity Bursary I would have worked fewer hours in a paid job	57
With an Opportunity Bursary I would not have had to take up a part-time job	42
Receiving the Opportunity Bursary would have enabled me to live away from home	24
Receiving the Opportunity Bursary would have enabled me to attend the university/higher education institution I wanted to go to	11
Receiving the Opportunity Bursary would have enabled me to study the subject I wanted to	5

As can be seen from Table 20, over nine out of ten students who had not received Opportunity Bursaries reported that a bursary would have made them less worried about meeting the costs of going to university. Nearly six out of ten non-recipients reported that they would have worked fewer hours in a paid job if they had had a bursary and about two-fifths indicated that they would not have had to take up a part-time job.

5. SUMMARY AND POLICY IMPLICATIONS

This survey of students who applied for and were eligible for an Opportunity Bursary revealed that both Opportunity Bursary recipients and non-recipients were broadly similar in terms of their academic qualifications. Their background characteristics were also comparable – in both groups more females than males responded; there was little variation in terms of the ethnic background of the students in the two groups, although overall somewhat more were from minority ethnic groups compared with applicants nationally. Turning to family background, around nine out of ten students in both groups reported that they had been living with their mothers when they applied for a place in higher education; over half reported living with their fathers. A significant proportion of their parents were not in work. Of those who were in work the majority of fathers were in manual work. The majority of mothers were in non-manual occupations (largely as a result of being in sales occupations). Very few parents had experience of higher education. A significant minority of students in both groups reported living with their parents during term time, although more with Opportunity Bursaries were doing so.

Reasons for applying to higher education were varied, with the vast majority in both groups reporting that they wanted to improve their career prospects, improve their earnings potential and broaden their horizons. Students were asked about concerns that they might have about entering higher education. Significantly more **non-recipients** of Opportunity Bursaries reported being worried about getting into debt, knowing that they would have to work whilst in higher education, and being worried about combining studying with a job. More **recipients** than non-recipients were confident that the long-term financial benefits would outweigh the costs of doing the course. These findings suggest that the relatively modest amount of the Opportunity Bursary affects students' views about the value of higher education and also reduces anxieties about debt and combining studying with a job whilst at university.

In terms of influences on entering higher education, students reported talking to their mothers most frequently, followed by school/college friends, teacher/college lecturers, tutor/form tutors and fathers. The key role of the mother in their children's education has been demonstrated in other research studies (e.g. David *et al.*, 1994; West *et al.*, 2000). A wide variety of sources of information were reported: university prospectuses were mentioned by virtually all students and high proportions of students also mentioned the UCAS web-site, the school/college library and the web-sites of higher education institutions.

Students reported having participated in a wide range of activities to do with higher education whilst at school or college. The most frequently mentioned

were university open days, followed by visits to school/college by higher education staff and by higher education students.

More students who responded were from post-1992 than from pre-1992 institutions, reflecting the allocation of Opportunity Bursaries to different types of institution. Nearly half the students in both groups had applied to study for a BA degree, with somewhat fewer applying to study for a BSc degree. Small proportions of students applied to study other degrees/diplomas (e.g. LLB, BEd or HND).

A number of differences were found between recipients and non-recipients of Opportunity Bursaries in terms of their attitudes after their first year in higher education. More non-recipients than recipients reported that they did not feel that they could afford to continue with their studies and that part-time work was interfering with their studies. This suggests that Opportunity Bursary recipients felt less anxious about their financial situation and less anxious about the effect of part-time work on their studies. Notwithstanding these findings, it is interesting to note that the actual number of hours that Opportunity Bursary recipients and non-recipients reported working was very similar.

In terms of students' attitudes towards Opportunity Bursaries we found that high proportions of students who **had received Opportunity Bursaries** reported that the bursary made them less worried about meeting the costs of going to university and half reported that it had enabled them to continue studying; however the latter needs to be countered by the finding that nearly two-thirds of the students reported that the bursary had no influence on their decision to enter higher education.

Virtually all those students who **had not received Opportunity Bursaries** reported that a bursary would have made them less worried about meeting the costs of going to university. Importantly, students who had not received Opportunity Bursaries reported significantly higher levels of debt than recipients of bursaries; this applied to bank overdrafts and to credit card debt. Lower levels of debt were also reported by students who were living at home, and students whose fathers had no qualifications. More non-recipients than recipients reported support from their families to help with their living costs – they appeared to be subsidising their children's higher education given the lack of other financial support.

In summary, the key findings to emerge from this study are:

- ◆ the Opportunity Bursaries appear to have been allocated, in the main, to the intended beneficiaries;
- ◆ the Opportunity Bursary, in spite of its relatively modest value, appears to have had a positive impact on recipients as:
 - fewer recipients reported being worried about getting into debt;
 - fewer recipients were worried about combining studying with a job;

- more recipients were confident about the long-term benefits outweighing the costs of their studies;
- fewer recipients reported feeling unable to continue with their studies on account of the costs;
- students who had received Opportunity Bursaries reported lower levels of debt (bank overdraft and credit card balance) than non-recipients.

In conclusion, the evidence from the first survey of Opportunity Bursary recipients and non-recipients suggests that the scheme is meeting its objectives in terms of reaching the relevant target group and in terms of helping beneficiaries to meet the costs associated with higher education (and avoid some of the debt). There is also a suggestion that the bursary may be helping to make students view their higher education experience more positively than would otherwise be the case. If this is borne out in subsequent research, it suggests that the introduction of the new Higher Education Grant from September 2004 will likewise have a positive effect in relation to those from disadvantaged groups who are currently under-represented in higher education.

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ANNEX A TIMETABLE AND RESPONSE RATE

Table A1. Survey timetable

Activity	Timing
Letters to Vice-Chancellors and Principals of HE/FE institutions	12/08/02
Letters to contacts at higher education providers	14/08/02
Reminder letters to contacts	26/08/02
Telephone, fax, e-mail reminders	2/09/02-13/09/02
Questionnaires sent to higher education providers	16/09/02-18/09/02
Questionnaires returned	7/10/02-23/04/03

Table A2. Response of higher education providers

	Number	%
Number of higher education providers contacted	126	100
Number of higher education providers agreeing to participate	90	72

Table A3. Reasons given by higher education providers for non-participation

Reason	Number
Time restraints/resource related	3
No reason given	2
No records of applicants/no knowledge of administration of scheme	2
Not enough applicants or no unsuccessful applicants	3
Total	10

ANNEX B COMPARISON OF SAMPLE WITH UCAS DATA

Table B1. Ethnic background of UCAS ‘home’ applicants accepted for degree/HND courses in England for entry in 2001

Ethnic Background	% accepted applicants
Asian or British Asian – Bangladeshi	1
Asian or British Asian – Indian	5
Asian or British Asian – Pakistani	3
Asian or British Asian – Chinese/Other	2
Black or Black British – African/Caribbean/Other	4
Mixed – African/Asian/Caribbean/Other	2
White – British/Irish/Other	74
Other ethnic group	1
Not known	8

Source: UCAS (2003)

Table B2. Ethnic background of students with and without Opportunity Bursaries

Ethnic background	% OB recipients (N=589)	% OB non-recipients (N=163)
Asian or British Asian – Bangladeshi	4	4
Asian or British Asian – Indian	8	7
Asian or British Asian – Pakistani	7	4
Asian or British Asian – Chinese/Other	4	4
Black or Black British – African/Caribbean/Other	5	6
Mixed – African/Asian/Caribbean/Other	4	4
White – British/Irish/Other	69	70
Other ethnic group	0	2

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents answered all questions. Percentages do not always equal 100 because of rounding.

Table B3. Sex of UCAS ‘home’ applicants accepted for degree/HND courses in England for entry in 2001

Sex	% accepted applicants
Female	53
Male	47

Source: UCAS (2003)

Table B4. Sex of students with and without Opportunity Bursaries

Sex	% OB recipients (N=590)	% OB non-recipients (N=165)
Female	70	73
Male	30	27

Table B5. Subjects taken by 'home' students accepted for degree/HND courses in England for entry in 2001

Subject	Percentage of accepted applicants
Social studies, law, business studies, mass communication	26
Medical sciences, subjects allied to medicine, biological and veterinary sciences	15
Physical sciences, mathematics, computer sciences, engineering, technologies, architecture	20
Linguistics, languages, literature, historical and philosophical studies, education	13
Creative arts and design	11
Combined studies	14

Source: UCAS (2003)

Percentages do not always equal 100 because of rounding.

Table B6. Subjects OB recipients and non-recipients applied to study

Subject	% OB recipients (N=586)	% OB non- recipients (N=161)
Social studies, law, business studies, mass communication	22	18
Medical sciences, subjects allied to medicine, biological and veterinary sciences	16	13
Physical sciences, mathematics, computer sciences, engineering, technologies, architecture	16	17
Linguistics, languages, literature, historical and philosophical studies, education	8	7
Creative arts and design	10	18
Combined subjects	27	27

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents answered all questions. Percentages do not always equal 100 because of rounding.

ANNEX C REASONS FOR EXCLUSION FROM ANALYSIS

Table C1. Reasons for exclusion of respondents from analysis

Reason for exclusion from analysis	Number	OB recipients (n)	OB non-recipients (n)
Studying GCE A levels/AVCE (1)	21	3	18
'Dropped out' of higher education	11	6	5
Deferred entry after starting HE course	7	4	3
Gap year	5	0	5
Other	2	1	1
Total	46	14	32

(1) It appears that higher education providers sent out questionnaires to applicants for 2002/03.

N=46 (not 47- see Section 4) as it was not possible to determine if one respondent was an OB recipient or non-recipient.

Reasons for not starting or continuing with higher education

Respondents were invited to give reasons as to why they did not start higher education or decided not to continue. In some cases, **financial factors** were cited, for example:

Did not start again. As struggled with fees and did not want to take out another large loan [without Opportunity Bursary – left higher education in December 2001].

I decided not to continue because I could not afford the fee [with Opportunity Bursary – did not start higher education – full-time job from September 2001].

I delayed my entry into higher education by one year as I needed to save money. I therefore worked full-time for one year [without Opportunity Bursary – full-time job from September 2001].

In some cases, **multiple factors** were cited, for example:

I did not have the motivation to continue with my studies and decided that university was not right for me. I was also struggling financially [without Opportunity Bursary – left higher education in December 2001].

Did not feel happy at university, felt having come straight from GCSEs and A levels, needed a break. Three years at university seemed rather daunting [with Opportunity Bursary – left higher education in February 2002].

I did not enjoy studying at [named university], especially whilst I was still living at home. I am saving money this year so I can move out of London and live on campus at a different university that is cheaper [without Opportunity Bursary – left higher education in January 2002].

ANNEX D OPPORTUNITY BURSARY GUIDANCE ON ELIGIBILITY

Who was eligible for an Opportunity Bursary?

According to guidance on Opportunity Bursaries, bursaries could be awarded to applicants for higher education places on full-time undergraduate courses starting after 1 September 2001, who were aged under 21 at the start of the course. Institutions were advised that they should allocate funding for Opportunity Bursaries initially to applicants attending a school or college within one of the Excellence in Cities (EiC) areas.²⁴ However, if having awarded Bursaries to all applicants who met this criterion, institutions that still had funding available could award bursaries to applicants from schools or colleges outside EiC areas, as long as they met all the other criteria. This included applicants resident in Wales, Scotland and Northern Ireland. Institutions were also advised that they should give priority to any applicants in local authority care, and whose circumstances meant that they would particularly benefit from the award of a bursary (HEFCE, 2000).

Extracts from HEFCE (2000)

‘Applicants **must** meet the following criteria:

a. Residency:

- ♦ they are home students, that is they have been resident in the United Kingdom and Islands for three years prior to the start of the course and have settled status within the UK. They should not have been resident here for only the purposes of education; or
- ♦ they are the children or spouses of migrant workers who have been resident within the European Economic Area for the three years prior to the start of the course; or
- ♦ they have refugee status; or
- ♦ they have been given exceptional leave to remain by the Home Office (and have been resident in the United Kingdom and Islands for the three years prior to the start of the course).

b. Experience of higher education:

- ♦ their family has had little or no experience of higher education, for example if neither parent has a degree qualification or attended university. (N.B. institutions should look sympathetically at applicants where a parent or older sibling is currently undertaking a course of HE study.)

²⁴ In later guidance (DfES, 2001) eligibility was extended to those living in statutory Education Action Zones.

c. Family income:

- ♦ they are in receipt of an Education Maintenance Allowance (EMA) which is above or equivalent to the amount payable where the family income is below £20,000; or
- ♦ their family²⁵ has a gross income before tax of less than £20,000 or receives any of the following means-tested state benefits:²⁶

Income Support, Housing Benefit, Jobseekers' Allowance, Working Families Tax Credit, Disabled Person's Tax Credit, Incapacity Benefit, Severe Disablement Allowance, Industrial Injuries Benefit, Disability Working Allowance.

Institutions may also wish to take into account whether applicants have taken part in a university summer school or Compact scheme or other HE widening access scheme. It is not essential for bursary applicants to have done so but this may be a good indicator of their motivation and suitability for an HE course. (Institutions will be aware that the DfEE's HE summer school programme was only available in EiC areas in 2000.)' (HEFCE, 2000).

²⁵ In later guidance (DfES, 2001) only the income available to the family the pupil was living with was looked at. For applicants from foyers or local authority care, their own income was assessed.

²⁶ In later guidance (DfES, 2001) if an individual's sole income was from specified non-means tested benefits, then the applicant met the OB criteria. If this was not the sole income, the institution had to be satisfied that the applicant's income was less than £20,000.

ANNEX E TECHNICAL ANNEX

Family characteristics of students

Table E1. Who applicants lived with when they applied for higher education

Who applicant lived with...	% OB recipients (N=590)	% OB non-recipients (N=166)
Mother	90	91
Father	55	61
Step-mother (or father's partner)	1	1
Step-father (or mother's partner)	5	10
Another adult	4	3
Own children	1	1
Other living arrangements	2	0

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents answered all questions.

Views about higher education studies

Table E2. Views about higher education studies: students who disagreed with statements

Statement...	% OB recipients (N=549-581)	% OB non-recipients (N=156-164)
I wish I could have transferred to another institution	84*	77*
I wish I could have changed the course I was studying	77	74
I do not feel that I can afford to continue with my studies	62*	43*
My course was easier than I expected	57	57
Sometimes I had difficulty keeping up with my studies	37	35
Studying was harder than I expected	32	32
I feel that part-time work interfered with my studies	32	28
I was happy with the institution I attended	5	6
I enjoyed my course	5	4
I got on well with other students	3	2
I feel that I learned new skills	2	5
I got on well with my teachers/lecturers	2	4
I feel that I gained new knowledge	1	2

Ns are less than 592 and 166 for OB recipients and non-recipients as not all respondents answered all questions. Figures in bold and asterisked signify that the difference between OB recipients and non-recipients is statistically significant at the 0.05 level or beyond using chi-squared analyses.

Multiple regressions

To examine whether gender was independently associated with attitudes towards higher education studies, a series of forced entry multiple regressions were carried out, with gender and OB recipient/non-recipient included as predictor variables. The estimates of the differences between the bank overdraft level are shown in Tables E3 to E6 (B values) together with the t value and the probability of the result occurring by chance (P).

As can be seen from Tables E3 to E5, there were significant independent associations between gender and receiving/not receiving an OB for each of the dependent variables investigated: more females and those without OBs reported that they were worried about debt; knew they would have to work whilst studying; and were worried about combining work and study.

Table E3. Results of multiple regression with variable 'worried about debt'

Model	Difference Beta	T	Probability (P)
Sex	0.17	4.59	0.000
OB recipient	0.08	2.13	0.034

Table E4. Results of multiple regression with variable 'I knew I would have to work'

Model	Difference Beta	T	Probability (P)
Sex	0.1	2.82	0.005
OB recipient	0.1	2.64	0.008

Table E5. Results of multiple regression with variable 'worried about combining study with job'

Model	Difference Beta	T	Probability (P)
Sex	0.14	3.97	0.000
OB recipient	0.12	3.33	0.001

By way of contrast, the analyses revealed that more males and OB recipients felt that the financial benefits of higher education would outweigh the financial costs (see Table E6).

Table E6. Results of multiple regression with variable ‘financial benefits will outweigh costs’

Model	Difference Beta	T	Probability (P)
Sex	-0.12	-3.34	0.001
OB recipient	-0.10	-2.79	0.005

To examine whether various predictor variables were independently associated with students’ levels of debt, a forced entry multiple regression with the following predictor variables included: OB recipient/non-recipient, living at home/not living at home in term-time and a father with no qualifications/some qualifications were included. These were included as it was hypothesised that living at home might be associated with lower levels of debt and that students coming from a family where the father had no qualifications might be more debt averse than others. Preliminary analyses revealed an association between each of these and levels of debt.

The estimates of the differences between the bank overdraft level are shown in Table E7 (B values) together with the t value and the probability of the result occurring by chance (P). As can be seen, there was a significant association between each of the predictor variables (living at home, receiving an OB and the student’s father having no qualifications) and levels of debt. In short, debt levels were lower for those living at home, receiving an OB and where the father had no qualifications.

Table E7. Results of multiple regression on levels of bank overdraft

Model	Difference Beta	T	Probability (P)
Living at home	0.20	3.03	0.003
OB recipient	0.18	2.71	0.007
Father with no qualifications	0.19	2.63	0.009

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