

# Evaluation of Aimhigher: Excellence Challenge First Survey of Opportunity Bursary Applicants 2002/03: Preliminary Findings

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Centre for Educational Research, Department of Social  
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*Evaluation of Aimhigher:Excellence Challenge*

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Applicants 2002/03: Preliminary Findings*

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## EXECUTIVE SUMMARY

### Background

The Aimhigher: Excellence Challenge programme was initially 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 The programme has now been superseded by a new national programme (known as Aimhigher) funded by the Higher Education Funding Council for England (HEFCE) and the Learning and Skills Council (LSC).

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: Excellence Challenge 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 2002/03 (see West *et al.*, 2003b for the findings of the first survey of those who applied to begin in 2001/02). Of the 140 higher education providers that were invited to participate in the survey, 97 (69 per cent) agreed to cooperate and in September 2003, 4,523 questionnaires were sent to higher education providers for them to distribute to young people who had applied for Opportunity Bursaries; these included both successful and unsuccessful applicants. A total of 774 questionnaires were returned (representing a response rate of at least 17 per cent); of these, 475 were identified as coming from Opportunity Bursary (OB) recipients and 153 as coming from non-recipients. In addition, 138 young people had not commenced higher education or had left during the course of the first year. In eight 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 the vast majority had taken 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 2002/03, and who provided relevant information, 70 per cent were females and 30 per cent were males. The comparable figures for non-recipients were 74 and 26 per cent. The mean age of recipients on 1 October 2003 (at the beginning of their second year of study) was 20 (median 19.8) and of non-recipients 20.1 (median 19.9).
- ♦ 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, 92 per cent of OB recipients reported that they had lived with their mother and 59 per cent with their father. The comparable figures for non-recipients were 93 per cent and 67 per cent.

### **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 agreed with the statement ‘I was worried about getting into debt’. Fewer OB recipients than non-recipients reported being worried about combining studying with a job (this difference was statistically significant).

### **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. More OB non-recipients than recipients reported that they had talked to their father and to a youth worker.
- ♦ 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 form tutor 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 seven out of ten respondents. Over 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 2001/02 just as the Aimhigher: Excellence Challenge (formerly Excellence Challenge) programme was set up.
- ◆ 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 four out of ten OB recipients (42 per cent) and non-recipients (47 per cent) reported attending pre-1992 institutions; 52 per cent and 44 per cent respectively reported attending post-1992 institutions; two per cent and one per cent 'other' higher education institutions; and four per cent and seven per cent 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 part-time work interfered with their studies and that they sometimes had difficulties keeping up with their studies (these differences were statistically significant). However, similar proportions of bursary recipients and non-recipients reported that they had worked and the mean number of hours worked in a normal week was also similar for both groups of students.

### **Financial situation**

- ◆ Around eight out of ten respondents reported having a bank overdraft facility – 81 per cent of Opportunity Bursaries recipients and 82 per cent of non-recipients. The mean amount of the overdraft at the end of the previous month was similar in both groups.
- ◆ Similar percentages of OB recipients and non-recipients reported having a credit card. The mean balance at the end of the previous month was similar for both groups.
- ◆ Similar proportions of recipients and non-recipients reported that they had applied for a student loan for the academic year 2002/03. The mean amount of the student loan was broadly similar in both groups.



- ◆ Students were asked if they received money from their family to help with living costs during the academic year 2002/03. There was a statistically significant difference in the amount received, with the amount per week being lower for Opportunity Bursary recipients than for non-recipients (median of £20 versus £25 respectively).

### **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. 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.
- ◆ Around 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. Half 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**

- ◆ 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, with parents of recipients contributing less than those of non-recipients.
- ◆ In spite of its relatively modest value, the Opportunity Bursary appears to have had a positive impact on recipients in terms of their attitudes, with recipients being less worried than non-recipients about combining studying with a job and fewer feeling that part-time work had interfered with their studies (even though the hours worked were similar); a high proportion of recipients reported that the bursary had made them less worried about meeting the costs of going to university.
- ◆ Given that concern has been expressed in some circles that variable fees, due to be introduced from 2006, may deter students from more disadvantaged groups entering higher education, the findings suggest that the new Higher Education Grant (introduced in September 2004) should also have a positive effect in relation to these groups who are currently under-represented in higher education.

# 1. INTRODUCTION

## 1.1 The Evaluation of Aimhigher: Excellence Challenge

The evaluation of the Aimhigher: Excellence Challenge 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 programme was initially 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 White Paper, *'The Future of Higher Education'* (DfES, 2003) made a commitment to bring Aimhigher: Excellence Challenge and Aimhigher: Partnerships for Progression together to deliver a national outreach programme called Aimhigher (HEFCE, 2004).

The key strands of the Aimhigher: Excellence Challenge programme (DfES, reported in West *et al.*, 2003b) were:

- ♦ 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**); and
- ♦ to pilot new forms of extra financial help through 26,000 Opportunity Bursaries to young people, each worth £2000 per student over three years (**Strand 4**).

Subsequently, two further strands were introduced:

- ♦ to evaluate the Aimhigher: Excellence Challenge through a multi-faceted research programme. This evaluation 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 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.

The Government White Paper '*The Future of Higher Education*' (DfES, 2003), 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'. This programme has now been established (HEFCE, 2004). 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.*, 2003a) 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: Excellence Challenge 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: Excellence Challenge 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: Excellence Challenge 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: Excellence Challenge 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 findings from the first survey of young people who were eligible for, and applied for Opportunity Bursaries to begin in 2002/03 (see West *et al.*, 2003b, for the findings relating to those who applied to begin in 2001/02).

## **1.2 The Survey of Opportunity Bursary applicants**

At the beginning of the 2003/04 academic year, as part of the evaluation of the Aimhigher: Excellence Challenge 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. An outline of the Aimhigher: Excellence Challenge 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 and implications for policy.



## 2. THE AIMHIGHER: EXCELLENCE CHALLENGE PROGRAMME

The Aimhigher: Excellence Challenge programme was for a duration of three years, beginning in September 2001 (when it was known as Excellence Challenge). The programme built on the widening participation strategy funded by the Higher Education Funding Council for England (HEFCE).<sup>1</sup> The aim of the programme was to increase and widen participation in higher education among young people, including the number of young people from poorer backgrounds, who applied for and entered higher education. Another key related aim was to improve the links between schools, colleges and universities. The programme was divided into six strands, as shown in Figure 1.

**Figure 1. Strands of the programme**

- ♦ **Strand 1** funded 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** provided 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 provided advice, information and promoted higher education to young people from disadvantaged backgrounds in a variety of ways.
- ♦ **Strand 4** provided extra financial support for students through 26,000 Opportunity Bursaries each worth £2,000 over three years.
- ♦ **Strand 5** was the evaluation of the programme; this was 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** provided payments, through the student associates pilot programme to undergraduates to do work in schools and further education colleges; the aim was that they would provide role models for young people and help them to learn more about higher education.

Source: DfES (reported in West *et al.*, 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

<sup>1</sup> See Higher Education Consultancy Group (HECG) & National Centre for Social Research (NCSR), 2003.

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 (DfEE, 2000). Opportunity Bursaries were 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, 2002).

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 2002/03, there were 7,710 Opportunity Bursaries available for higher education institutions (HEFCE, 2002); 34 per cent were allocated to pre-1992 higher education institutions, 65 per cent to post-1992 institutions and one per cent to 'other' higher education institutions (such as specialist colleges). Another 500 Opportunity Bursaries were available for further education colleges participating in the scheme (DfES, 2004).

### 3. METHODS

#### 3.1 Procedure

A total of 140 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 2002/03 academic year. The Vice-Chancellors and Principals were advised, by letter, about the evaluation of the Opportunity Bursary scheme and that the Consortium would also be contacting the relevant person in their institution for their help with the survey (see **Annex A** for timetable). The letter to the contact staff asked for their assistance in 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.<sup>2</sup> 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 2002/03. 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.<sup>3</sup>

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.<sup>4</sup> It was not possible to ask higher education institutions to follow-up those who had been sent questionnaires as unsuccessful applicants could only have been contacted by post and based on responses to our initial request

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<sup>2</sup> 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.

<sup>3</sup> No checks were made to ensure that methods recommended were adopted as this would have created an undue burden on institutions.

<sup>4</sup> In some cases, at the request of the higher education provider, students were given the envelope by hand.



for 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. Moreover, to ensure comparability between the surveys of students who started their higher education programmes in 2001/02 and in 2002/03, similar procedures needed to be in place for both years.

### 3.2 Sample

Of the 140 institutions that were invited to participate in the survey, 97 (69 per cent) agreed to cooperate (15 refused<sup>5</sup> and the remainder did not respond) and in September 2003, a total of 4,523 questionnaires were distributed to these providers. A total of 774 questionnaires were returned representing a response rate of at least 17 per cent,<sup>6</sup> 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.<sup>7</sup>

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<sup>5</sup> See **Annex A** for reasons given for non-participation by higher education providers.

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

<sup>7</sup> 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 774 questionnaires returned, 475 were identified as coming from Opportunity Bursary (OB) recipients and 153 as coming from non-recipients. These students had started the first year of their programme. In addition, 138 young people had not commenced higher education or had left ('dropped out') during the course of the first year.<sup>8</sup> In eight cases it was not possible to determine whether or not students had been allocated an Opportunity Bursary<sup>9</sup> so they were excluded from the analyses reported below, which relate to 475 recipients and 153 non-recipients of Opportunity Bursaries.

Findings relate to 628 respondents providing usable data (475 OB recipients and 153 non-recipients). Of these 182 were male and 443 female (no information was available for three respondents).

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 2002/03 and those who were **non-recipients**. Our focus is on those young people who started their studies in higher education in the autumn term 2002/03 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 institution and 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 86 per cent reported having taken General Certificate of Education Advanced (GCE A) levels.<sup>10</sup> Almost all (99 per cent of recipients and non-recipients)

<sup>8</sup> For the purposes of this report young people who reported that they had not commenced higher education or had left higher education before the end of the 2002/03 academic year were excluded from the analysis. For further details see **Annex C**.

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

<sup>10</sup> 57 per cent of recipients and 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) (3 per cent and 5 per cent respectively); an intermediate level GNVQ (6 per cent versus 10 per cent); or an advanced level GNVQ (16 and 14 per cent respectively).

reported **GCSE results**. The mean GCSE point score<sup>11</sup> was very similar for recipients (N=472) and non-recipients (N=151) (58.2 versus 58.7) as was the median (58.0 versus 59.0).<sup>12</sup> 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.<sup>13</sup>

85 per cent of recipients and 88 per cent of non-recipients reported GCE A/AS level results. The mean GCE A/AS level point score<sup>14</sup> was very similar for Opportunity Bursary recipients (N=403) and non-recipients (N=134) (23.1 versus 25.1) as was the median (23.0 versus 23.5).<sup>15</sup> 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 2002/03 and who provided relevant information (N=472), 70 per cent were females and 30 per cent were males.<sup>16</sup> The comparable figures for non-recipients were 74 and 26 per cent (N=153). The mean age of recipients on 1 October 2003 (at the beginning of their second year of study) was 20.0 (median 19.8) and of non-recipients 20.1 (median 19.9). 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.<sup>17</sup> 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.

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<sup>11</sup> One GCSE at grade A\* was awarded 8 points, grade A 7 points, grade B 6 points and so on.

<sup>12</sup> Excluding GNVQs.

<sup>13</sup> All differences reported to be statistically significant are significant at the 0.05 level or beyond (using independent t-test, Fisher's exact test, chi-squared test or regression as relevant).

<sup>14</sup> 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.

<sup>15</sup> Advanced level GNVQs, which were taken by a minority of students, were excluded.

<sup>16</sup> 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; 2003b).

<sup>17</sup> See **Annex B** for comparison with UCAS 'home' applicants accepted for entry in 2002.

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

Ethnic background	% OB recipients (N=468)	% OB non-recipients (N=152)
Asian or British Asian – Bangladeshi	3	3
Asian or British Asian – Indian	7	5
Asian or British Asian – Pakistani	6	8
Asian or British Asian – Chinese/Other	3	3
Black or Black British – African/Caribbean/Other	6	5
Mixed – African/Asian/Caribbean/Other	3	3
White – British/Irish/Other	71	72
Other ethnic group	2	1

*Ns are less than 475 and 153 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, 92 per cent of OB recipients (N=469) reported that they had lived with their mother and 59 per cent with their father. The figures for non-recipients (N=150) were 93 per cent and 67 per cent respectively. (See also **Annex E**.) Similar proportions of recipients and non-recipients reported that they had been living with both parents (55 per cent versus 62 per cent respectively).

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=267) and non-recipients (N=98) who reported that they had been living with their father, 53 per cent and 69 per cent respectively reported that he had been in full-time employment, 9 per cent and 4 per cent respectively that he had been in part-time employment and 38 per cent and 27 per cent respectively that he had not been in work. Of the recipients (N=154) and non-recipients (N=67) whose fathers had been in work, 35 per cent and 42 per cent respectively were reported to have been in non-manual occupations; the majority were in manual occupations (65 and 58 per cent respectively).

Of those OB recipients who reported that they had been living with their mother (N=416) and comparable non-recipients (N=137), 28 per cent and 45 per cent respectively reported that their mother had been in full-time employment; 26 per cent and 25 per cent respectively that she had been in part-time employment and 45 per cent and 30 per cent respectively that she had not been in work. Of those whose mothers were in work, 58 per cent of recipients (N=219) and 69 per cent of non-recipients (N=89) respectively were reported to have been in non-manual occupations with the remainder having been in manual occupations (42 and 31 per cent respectively).<sup>18</sup>

<sup>18</sup> The category of 'sales' was classified as non-manual.

The percentage of families where both parents were in full-time work was 6 per cent (N=475) for OB recipients and 25 per cent (N=153) for non-recipients (this difference was statistically significant). The percentage of households where one parent was working full-time and one part-time was 11 per cent (N=475) for OB recipients and 12 per cent (N=153) 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.<sup>19</sup>

**Table 2. Highest educational level of mother**

Highest qualification	% OB recipients (N=356)	% OB non-recipients (N=117)
None	37	33
GCE O levels or equivalent <sup>20</sup>	39	38
GCE A levels	11	4
Professional qualification	10	9
Undergraduate	2	14
Postgraduate	1	2

*Ns are less than 475 and 153 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.<sup>21</sup>

<sup>19</sup> See **Annex D** for guidance on eligibility criteria for Opportunity Bursaries for students entering higher education.

<sup>20</sup> 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.

<sup>21</sup> See **Annex D**.

**Table 3. Highest educational level of father**

Highest qualification	% OB recipients (N=262)	% OB non-recipients (N=97)
None	42	42
GCE O levels or equivalent	34	28
GCE A levels	7	4
Professional qualification	9	10
Undergraduate	5	10
Postgraduate	3	5

*Ns are less than 475 and 153 for OB recipients and non-recipients as not all respondents were able to provide details. Percentages do not always equal 100 because of rounding.*

Similar proportions of OB recipients and non-recipients (48 per cent and 44 per cent respectively) reported that they lived 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=430-470)	% OB non-recipients (N=139-152)
I wanted to improve my career prospects	97	95
I had a specific course that I wanted to study	93	96
I wanted to broaden my horizons	92	92
I wanted to improve my earnings potential	91	89
I knew that I wanted to continue studying	89	87
I had always intended to go on to university/higher education	88	84
I had a specific career that I wanted to pursue	82	80
I wanted to meet new people	77	78
I wanted to become more independent	75	75
I wanted to experience university life	71	74
I particularly wanted to study at one of the institutions I applied to	68	76
I particularly wanted to live in the city/town where the institution is based	30	37
I was unsure about what to do, so I continued studying	24	27
I wanted to delay getting a full-time job	16	17

*Ns are less than 475 and 153 for OB recipients and non-recipients as not all respondents answered all questions.*

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. No statistically significant difference emerged between OB recipients and non-recipients, although there was a non-significant trend<sup>22</sup> for non-recipients to report that they particularly wanted to live in the city/town where the institution was based.

For OB recipients and non-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=467-469)	% OB non-recipients (N=147-152)
I wanted to improve my career prospects	67	62
I wanted to improve my earnings potential	60	51
I had always intended to go on to university/higher education	49	51
I knew that I wanted to continue studying	45	47
I wanted to broaden my horizons	42	43

*Ns are less than 475 and 153 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 Fisher’s exact test.*

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. Over half cited wanting to improve their earnings potential. A linear regression revealed a statistically significant association<sup>23</sup> between being in receipt of an OB and the recipient wanting to improve his or her earnings potential. Similar proportions of OB recipients and non-recipients cited as ‘very important’ the other reasons presented.

Respondents were 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 applied to them, in terms of the extent to which they agreed or disagreed with them, 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.

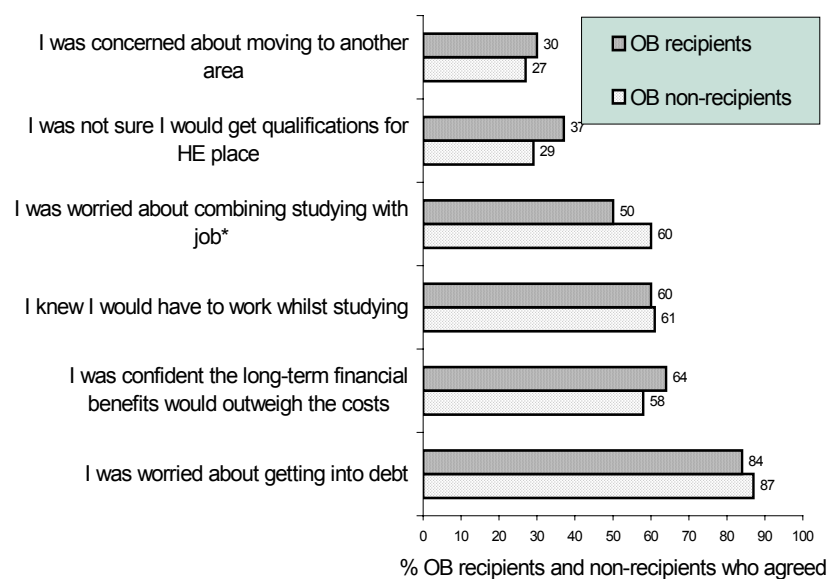
<sup>22</sup> p=0.096  
<sup>23</sup> p=0.034

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

Views about higher education	% OB recipients (N=454-474)	% OB non-recipients (N=147-152)
I was worried about getting into debt	84	87
I was confident that the long term financial benefits would outweigh the costs of doing the course	64	58
I knew that I would have to work whilst at university/HE institution	60	61
I was worried about combining studying with a job	<b>50*</b>	<b>60*</b>
I was not sure if I would get high enough qualifications to get a place at university/ HE institution	37	29
I was concerned about moving to another area	30	27

*Ns are less than 475 and 153 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 Fisher's exact test.*

As can be seen from Table 6 and Figure 2, over eight out of ten students reported that they agreed with the statement 'I was worried about getting into debt'. Around six out of ten agreed with the statement 'I was confident that the long term financial benefits would outweigh the costs of doing the course' and with the statement 'I knew that I would have to work whilst at university/HE institution'. More OB non-recipients than recipients were worried about combining studying with a job; this difference was statistically significant.

**Figure 2. Attitudes towards higher education**



In order to establish if there were differences between OB recipients and non-recipients in terms of the extent to which they agreed or disagreed with each of the statements, a series of linear regressions were carried out. One statistically significant association was found with recipients being less worried than non-recipients about combining study with a job.<sup>24</sup> There was a trend (bordering on statistical significance)<sup>25</sup> for OB recipients to be more confident than non-recipients that the long term financial benefits would outweigh the costs of doing the course. It is interesting to note that although there was no association between receiving or not receiving an OB and concern about debt, females were more likely than males to be worried about getting into debt<sup>26</sup> (this is in line with the findings of West *et al.*, 2003b).

### 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=475)	% OB non-recipients (N=153)
Mother	92	93
School/college friends	87	82
Teacher/college lecturer	83	78
Tutor/form tutor	69	69
Father	<b>69*</b>	<b>78*</b>
Brother or sister	62	58
Friends who had gone into higher education	57	54
Other family member (aunt, uncle, grandparent, cousin)	51	50
Careers adviser/personal adviser/Connexions adviser	44	45
Students currently in higher education	38	40
Staff working in higher education	22	26
Step-father (or mother's husband or partner)	10	9
Step-mother (or father's wife or partner)	5	8
Youth worker	<b>4*</b>	<b>9*</b>
Other (e.g. boyfriend, counsellor, professional)	4	8

*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 Fisher's exact test.*

<sup>24</sup> p=0.011

<sup>25</sup> p=0.051

<sup>26</sup> p=0.002

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. Two statistically significant differences emerged between the responses made by OB recipients and non-recipients, with more OB non-recipients having talked to their father and to a youth worker.

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=177 to 429)	Individual encouraged % OB non-recipients (N=38 to 141)
Teacher/college lecturer	96	94
Tutor/form tutor	<b>96*</b>	<b>93*</b>
Other family member (aunt, uncle, grandparent, cousin)	96	95
Friends who had gone into higher education	95	95
Students currently in higher education	92	90
Mother	91	94
School/college friends	91	94
Staff working in higher education	88	90
Father	86	89
Careers adviser/personal adviser/Connexions adviser	86	90
Brother or sister	82	88

*Ns are less than 475 and 153 for OB recipients and non-recipients as only those who had talked to particular individuals were asked this question. 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 tutor/form tutor 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=475)	% OB non- recipients (N=153)
University/HE open day	73	71
Visits to my school/college by staff working in HE	26	26
Visits to my school/college by HE students	17	20
Revision classes run by university/HE provider	16	11
Summer or winter school at university/HE provider	12	16
Shadowing an HE student	6	7
Mentoring by a university/HE student	5	5
Tutoring by a university/HE student	8	6
Saturday school at university/HE provider	5	6
Other activity (UCAS fair, residential visit)	5	6

As can be seen, the most frequently reported activity was university/higher education open days; this was mentioned by around seven out of ten students in both groups. Far smaller proportions of students mentioned other activities. No statistically significant differences were found between OB recipients and non-recipients.

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=198)	Affected choice % OB non-recipients (N=57)
University/HE open day	89	86
Visits to my school/college by staff working in HE	11	9
Summer or winter school at university/HE provider	9	16
Visits to my school/college by HE students	5	12
Revision classes run by university/HE provider	3	4
Tutoring by a university/HE student	3	0
Shadowing an HE student	3	4
Mentoring by a university/HE student	2	2
Saturday school at university/HE provider	1	2
Other activity (UCAS fair, residential visit)	5	2

*N* is less than 475 and 153 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.

Over 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. It is important to note that participation in higher education related activities would have taken place in 2001/02 just as the Aimhigher: Excellence Challenge (formerly Excellence Challenge) programme was set up.

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=475)	% OB non-recipients (N=153)
University prospectus/information from university/HE provider	98	95
UCAS web-site	75	73
University/higher education institution web-site	66	66
School/college careers library	53	53
‘Good universities guide’	<b>28*</b>	<b>37*</b>
Careers service/Connexions	23	18
Department for Education and Skills (DfES) web-site	3	4
Higher Education Funding Council (HEFCE) web-site	2	3
Other web-sites	2	2
Other (tutors, open days)	6	7

*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 Fisher’s exact test.*

As can be seen, almost all students used university prospectuses or information provided by universities. Other frequently used sources were the UCAS web-site, university web-sites and school/college careers libraries.

Students were 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=109 to 463)	Information helpful % OB non-recipients (N= 27 to 146)
University prospectus/information from institution	90	91
University/higher education institution web-site	86	84
'Good universities guide'	84	84
School/college careers library	80	80
UCAS web-site	82	76
Careers service/Connexions	77	78

*Ns are less than 475 and 153 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 Institution and programme of study

Forty-three per cent of OB recipients had **applied** to a pre-1992 institution for an Opportunity Bursary, 51 per cent to a post-1992 institution, 2 per cent to 'other' higher education institutions (such as specialist colleges) and 5 per cent to further education colleges. Forty-four per cent of non-recipients had applied to a pre-1992 institution, 47 per cent to a post-1992 institution, 7 per cent to a further education college and 1 per cent to 'other' higher education institutions. A small percentage of respondents (4 and 8 per cent of recipients and non-recipients respectively) indicated that they had changed institution. For recipients (non-recipients in parentheses), the final percentages were 42 per cent attending pre-1992 institutions (47 per cent); 52 per cent post-1992 institutions (44 per cent); 2 per cent 'other' higher education institutions (1 per cent); and 4 per cent further education sector colleges (7 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=475)	% OB non-recipients (N=153)
BA	43	48
BSc	30	29
LLB	6	3
HND	4	3
Other (BEng, BMus, BEd, MBBS, combined etc.)	17	16

*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=470)	% OB non-recipients (N=149)
Social studies, law, business studies, mass communication	24	19
Medical sciences, subjects allied to medicine, biological and veterinary sciences	21	17
Physical sciences, mathematics, computer sciences, engineering, technologies, architecture	14	11
Linguistics, languages, literature, historical and philosophical studies, education	8	13
Creative arts and design	9	15
Combined subjects	25	24

*Ns are less than 475 and 153 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

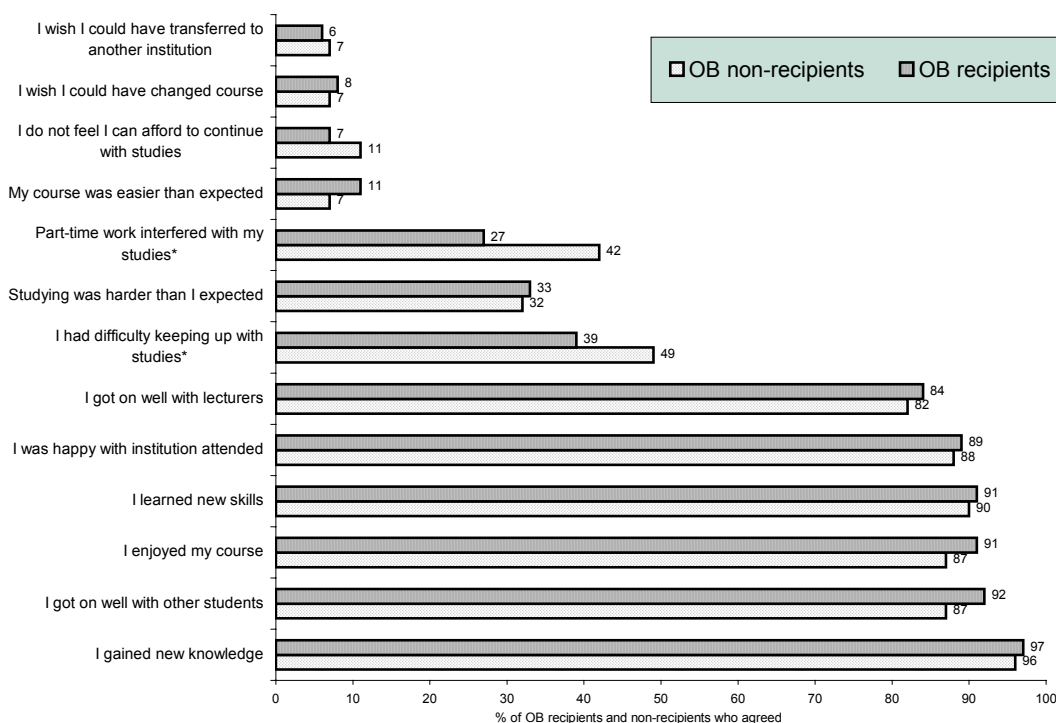
A series of questions was asked to find out about students' experiences of higher education in their first year and the support that they had received. Respondents were presented with a series of statements in order to establish their views about their educational studies during 2002/03 and were asked 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=441-465)	% OB non-recipients (N=142-151)
I feel that I gained new knowledge	97	96
I got on well with other students	92	87
I feel that I learned new skills	91	90
I was happy with the institution I attended	89	88
I enjoyed my course	91	87
I got on well with my teachers/lecturers	84	82
Sometimes I had difficulty keeping up with my studies	<b>39*</b>	<b>49*</b>
Studying was harder than I expected	33	33
I feel that part-time work interfered with my studies	<b>27*</b>	<b>42*</b>
My course was easier than I expected	11	7
I do not feel that I can afford to continue with my studies	7	11
I wish I could have changed the course I was studying	8	7
I wish I could have transferred to another institution	6	7

*Ns are less than 475 and 153 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 Fisher’s exact test.*

**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. Fewer recipients reported that they sometimes had difficulty keeping up with their studies; and fewer reported that part-time work interfered with their studies.

There was no statistically significant difference between recipients and non-recipients who agreed with the statement ‘I do not feel that I can afford to continue with my studies’, but more recipients disagreed with it (63 per cent versus 47 per cent (see **Annex E**)).

Interestingly, whilst more non-recipients than recipients reported that part-time work had interfered with their studies, similar proportions reported that they had worked in a part-time job during term time (48 per cent and 49 per cent respectively). The mean number of hours worked in a normal week was also similar for both groups of students – 14.2 hours (median 14.0) for recipients of Opportunity Bursaries (N=218) and 14.5 hours (median 14.0) for non-recipients (N=70).

Students were then asked about the support that they had received at their institution during 2002/03. Their responses are given in Table 16.



**Table 16. Support received by students**

Support received	Received support % OB recipients (N=475)	Received support % OB non-recipients (N=153)
Support from my individual tutor	63	63
Support from an academic member of staff	49	53
Financial support	<b>43*</b>	<b>28*</b>
Support by another student(s) (e.g. mentoring)	21	26
Financial advice	16	16
Support from student union (e.g. welfare staff)	13	12
Counselling	7	11
Other (e.g. family, friends, other HE staff)	3	5

*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 Fisher's exact test.*

As can be seen, around six out of ten students reported receiving support from their individual tutor and around half reported support from an academic member of staff. One statistically significant difference was found with more recipients than non-recipients reporting financial support (this could merely be an acknowledgement by these students that they received an OB).

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=59 to 291)	Found support helpful % OB non-recipients (N=17 to 94)
Financial support	<b>95*</b>	<b>83*</b>
Support from an academic member of staff	95	91
Financial advice	<b>84*</b>	<b>44*</b>
Support by another student(s) (e.g. mentoring)	88	81
Support from my individual tutor	86	86
Support from student union (e.g. welfare staff)	<b>83*</b>	<b>53*</b>

*N is less than 475 and 153 for OB recipients and non-recipients as this table only relates to those who reported receiving 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 Fisher's exact test.*

There were three statistically significant differences between students in the two groups in terms of the helpfulness of the support received. More

recipients than non-recipients reported that financial advice and support were helpful; one possible explanation is that recipients were in fact referring to the financial support received via the Opportunity Bursary. More recipients also reported that support from the student union was helpful.

## 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=469) and 82 per cent of non-recipients (N=153). The mean amount of the overdraft for these students at the end of the previous month was £634 (N=364) for recipients and £653 (N=116) for non-recipients of Opportunity Bursaries (see Figure 4). This difference was not statistically significant.

Similar percentages of Opportunity Bursary recipients and non-recipients reported having a credit card – 42 per cent of recipients (N=471) and 44 per cent of non-recipients (N=152). Over half of the students (60 per cent of recipients and 54 per cent of non-recipients) reported paying off the whole balance each month (this difference was not statistically significant). For those who did not pay off the whole balance each month, the mean balance at the end of the previous month did not differ significantly between recipients and non-recipients (£582 (N=26) versus £656 (N=74) respectively).

Similar proportions of recipients and non-recipients reported that they had applied for a student loan for the academic year 2002/03 (89 per cent versus 87 per cent). The mean amount of the student loan was similar in both groups (£4,550 for Opportunity Bursary recipients (N=405) compared with £4,708 for non-recipients (N=126)).

Students were asked if they had received money from their family to help with living costs during the academic year 2002/03. Similar proportions of OB recipients and non-recipients reported that they had received such help (20 per cent and 27 per cent respectively). However, there was a statistically significant difference between OB recipients and non-recipients with the amount per week being lower for Opportunity Bursary recipients than for non-recipients (mean £26 (N=84) and £39 (N=33) per week respectively; median £20 and £25 respectively).

Students were asked whether they had worked in a part-time job during term-time between September 2002 and July 2003. Similar proportions of Opportunity Bursary recipients and non-recipients (48 per cent and 49 per cent respectively) reported that they had; the median number of hours worked was the same (14.0) and the mean amount earned per hour was £4.90 per hour for recipients (N=209) and £5.03 for non-recipients (N=69).

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=427)	% OB non- recipients (N=43)
Own savings	<b>20*</b>	<b>42*</b>
Hardship/bursary award from university/higher education institution	<b>6*</b>	<b>28*</b>
Scholarship from a charitable foundation	<b>1*</b>	<b>12*</b>
Scholarship from institution	<b>1*</b>	<b>7*</b>
Other (e.g. NHS bursary, bank overdraft)	<b>6*</b>	<b>26*</b>

*N is less than 475 and 153 for OB recipients and non-recipients as this table only relates to those who reported receiving 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 Fisher's exact test.*

Whilst relatively few non-recipients reported receiving financial support, there were statistically significant differences between the two groups of students, with more non-recipients than recipients reporting financial support of all kinds.

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=475)
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	59
The Opportunity Bursary enabled me to continue studying	49
Receiving the Opportunity Bursary enabled me to attend the university/higher education institution I wanted to go to	38
The Opportunity Bursary meant that I worked fewer hours in a paid job than I would otherwise have had to	34
The Opportunity Bursary meant that I did not have to take up a part-time job	33
Receiving the Opportunity Bursary enabled me to live away from home	27
Receiving the Opportunity Bursary enabled me to study the subject I wanted to	31

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 (33 per cent) and that the bursary enabled them to work fewer hours in a paid job than they would otherwise have had to (34 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=153)
Obtaining an Opportunity Bursary would have made me less worried about meeting the costs of going to university/higher education institution	91
With an Opportunity Bursary I would have worked fewer hours in a paid job	50
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	9
Receiving the Opportunity Bursary would have enabled me to study the subject I wanted to	6

As can be seen from Table 20, around 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. Half of the 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 broadly 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. A significant minority 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 them being in administrative, clerical and sales occupations). Very few parents had experience of higher education.

Reasons for applying to higher education were varied, with the vast majority in both groups reporting that they wanted to improve their career prospects, had a specific course that they wanted to study, wanted to broaden their horizons and improve their earnings potential. Students were asked about concerns that they might have about entering higher education and it was found that fewer recipients than non-recipients were worried about combining studying with a job. This suggests that the relatively modest amount of the Opportunity Bursary may reduce anxieties about combining studying with a job whilst at university.

In terms of influences on entering higher education, high proportions of students reported talking to their mother, school/college friends and teacher/college lecturer. 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; West *et al.*, 2003b). 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 web-sites of higher education institutions; and the school/college library.

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 OB recipients who responded were from post-1992 than from pre-1992 institutions, but this situation was reversed in relation to non-recipients. 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 reported that part-time work interfered with their studies and that they sometimes had difficulties keeping up with their studies. However, similar proportions of recipients and non-recipients reported that they had worked and the mean number of hours worked in a normal week was also similar for both groups of students. 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. 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, first, that the Opportunity Bursaries appear to have been allocated, in the main, to the intended beneficiaries. Second, the Opportunity Bursary, in spite of its relatively modest value, appears to have had a positive impact on recipients in terms of their attitudes – they were less worried about combining studying with a job, and fewer felt that part-time work had interfered with their studies (even though the hours worked were similar). A high proportion also reported that the bursary had made them less worried about meeting the costs of going to university. These are particularly interesting findings in the light of recent research suggesting that financial difficulties can increase students' level of anxiety and depression, and that financial difficulties and depression can affect academic performance (Andrews & Wilding, 2004). Finally, given that concern has been expressed in some circles that variable fees, to be introduced from 2006, may deter students from more disadvantaged groups entering higher education, the findings suggest that the new Higher Education Grant (introduced in September 2004) should also have a positive effect in relation to these 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	12/08/03
Letters to contacts at higher education providers	12/08/03
Reminder letters to contacts	4/09/03
Questionnaires sent to higher education providers	22/09/03-23/09/03
E-mail reminder sent by DfES to HEI contacts	26/10/03
Second despatch of questionnaires to late responding HEIs	2/11/03

**Table A2. Response of higher education providers**

	Number	%
Number of higher education providers contacted	140	100
Number of higher education providers agreeing to participate	97	69
Number of higher education providers declining to participate	15	11

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

Reason	Number
Time restraints/resource related	5
Not enough applicants or no unsuccessful applicants	5
No reason given	4
Data gathering and information storage issues	1
<b>Total</b>	<b>15</b>



## ANNEX B Comparison of samples

**Table B1. Ethnic background of UCAS 'home' applicants accepted for degree/HND courses in England for entry in 2002**

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	9

Source: UCAS (2004)

Percentages do not always equal 100 because of rounding.

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

Ethnic background	% OB recipients (N=468)	% OB non-recipients (N=152)
Asian or British Asian – Bangladeshi	3	3
Asian or British Asian – Indian	7	5
Asian or British Asian – Pakistani	6	8
Asian or British Asian – Chinese/Other	3	3
Black or Black British – African/Caribbean/Other	6	5
Mixed – African/Asian/Caribbean/Other	3	3
White – British/Irish/Other	71	72
Other ethnic group	2	1

Ns are less than 475 and 153 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 2002**

Sex	% accepted applicants
Female	52
Male	48

Source: UCAS (2004)

**Table B4. Sex of students with and without Opportunity Bursaries**

Sex	% OB recipients (N=472)	% OB non-recipients (N=153)
Female	70	74
Male	30	26

*Ns are less than 475 and 153 for OB recipients and non-recipients as not all respondents answered all questions.*

**Table B5. Subjects taken by 'home' students accepted for degree/HND courses in England for entry in 2002**

Subject	Percentage of accepted applicants
Social studies, law, business studies, mass communication	25
Medical sciences, subjects allied to medicine, biological and veterinary sciences	17
Physical sciences, mathematics, computer sciences, engineering, technologies, architecture	19
Linguistics, languages, literature, historical and philosophical studies, education	12
Creative arts and design	11
Combined studies	16

*Source: UCAS (2004)*

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

Subject	% OB recipients (N=470)	% OB non-recipients (N=149)
Social studies, law, business studies, mass communication	24	19
Medical sciences, subjects allied to medicine, biological and veterinary sciences	21	17
Physical sciences, mathematics, computer sciences, engineering, technologies, architecture	14	11
Linguistics, languages, literature, historical and philosophical studies, education	8	13
Creative arts and design	9	15
Combined subjects	25	24

*Ns are less than 475 and 153 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)	107	0	107
Deferred entry after starting HE	10	5	5
Gap year	9	2	7
'Dropped out' of higher education	8	2	6
Other	4	3	1
<b>Total</b>	<b>138</b>	<b>12</b>	<b>126</b>

(1) It appears that higher education providers sent out questionnaires to applicants for 2003/04.

### 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. These were various and related to personal issues such as personal illness or family difficulties or to courses or places of study. In some cases, financial factors were cited as the main or one of the contributory factors, for example:

I decided university wasn't for me because of finance. As I am from a lone parent family my mother would not be able to help financially, therefore, I decided to go into full-time work but will not rule out university for the future [offered an Opportunity Bursary but did not start university].

I was supporting myself living in London. My only financial resources [were] my student loan (c. £4800 p.a.) I did not get an Opportunity Bursary. I found living costs even higher than I had anticipated. I did not feel comfortable constantly being in my overdraft, so I left in order to work for a few years before going back to university... [stopped studying December 2002].

I changed [institution] to be closer to home and [where it was] cheaper to live [without Opportunity Bursary; stopped studying February 2003].

[I gave up my course] due to brother's car crash and lack of financial support [with Opportunity Bursary; stopped studying February 2003].





## 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.<sup>27</sup> 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.)

<sup>27</sup> 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 family<sup>28</sup> has a gross income before tax of less than £20,000 or receives any of the following means-tested state benefits:<sup>29</sup>

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).

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<sup>28</sup> 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.

<sup>29</sup> 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 SUPPLEMENTARY TABLES

### Family characteristics of students

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

Who applicant lived with...	% OB recipients (N=469)	% OB non-recipients (N=150)
Mother	92	93
Father	59	67
Step-mother (or father's partner)	1	0
Step-father (or mother's partner)	5	5
Another adult	3	2
Own children	1	0
Other living arrangements	1	1

*Ns are less than 475 and 153 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=441-465)	% OB non-recipients (N=142-151)
I wish I could have transferred to another institution	84	82
I wish I could have changed the course I was studying	80	81
I do not feel that I can afford to continue with my studies	<b>63*</b>	<b>47*</b>
My course was easier than I expected	57	56
Sometimes I had difficulty keeping up with my studies	40	33
Studying was harder than I expected	35	32
I feel that part-time work interfered with my studies	<b>39*</b>	<b>28*</b>
I was happy with the institution I attended	5	5
I enjoyed my course	3	5
I got on well with other students	2	1
I feel that I learned new skills	3	2
I got on well with my teachers/lecturers	2	2
I feel that I gained new knowledge	1	1

*Ns are less than 475 and 153 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 Fisher's exact test.*

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