

# **A Wave of Change:**

The Future Landscape of the  
Student Movement



national union of students





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# Executive Summary

The student movement faces uncertain times – presenting challenges to address and opportunities to be seized. If we are to respond effectively to these challenges and opportunities, we need to understand the likely future landscape for students and students' unions. We need to be clear on what our key drivers are – by which we mean the major forces or trends that could positively or negatively shape the future of the student movement (*source: Voluntary Sector Strategic Analysis 2008/09 NCVO Third Sector Foresight*).

We believe the key drivers impacting on the student movement are:

- changes in students' union funding sources;
- a hyper-diversity within the student body, the education sector and students' unions;
- the importance of the student voice;
- changing student lifestyle and participation;
- the rise of digital media.

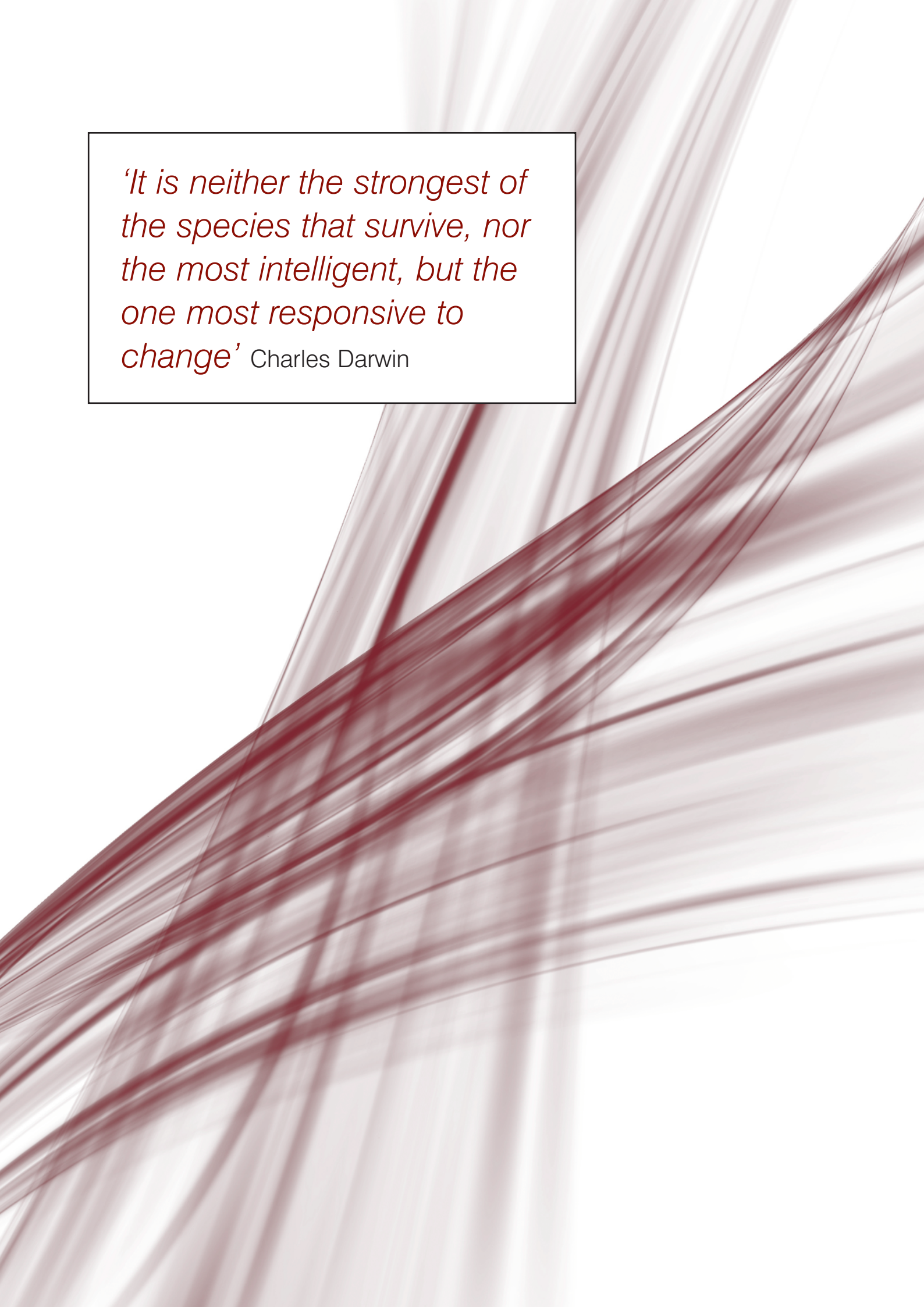
The student movement must prepare and plan now to effectively respond to this changing landscape. It will require new solutions to new challenges, whilst retaining the core values that make us what we are.

The purpose of this paper is to articulate a shared understanding of the future landscape having consulted widely. It is critical that we achieve buy in at all levels of the student movement, particularly on the ground in students' unions, if we are to effectively respond to these challenges.

Following agreement of the shared purpose and values for the student movement, in 2009–10 we will consider and agree a bold strategic response to the drivers that we are facing.

The student movement has changed many times in its history in response to changing landscapes. We believe that if we confront these threats and opportunities head on, developing and delivering a bold and effective strategy that addresses these drivers, the student movement will be considerably stronger than it is now and we will truly be making students' lives better.



The background of the entire image is an abstract composition of numerous thin, flowing lines in various shades of red and white. These lines create a sense of movement and depth, resembling a complex web or a dynamic landscape. The lines are most concentrated in the lower half of the image, where they form a dense, layered pattern that tapers off towards the top.

*'It is neither the strongest of  
the species that survive, nor  
the most intelligent, but the  
one most responsive to  
change'* Charles Darwin

# A Wave of Change:

## The Future Landscape of the Student Movement

The student movement faces uncertain times – presenting challenges to address and opportunities to be seized. If we are to respond effectively to these challenges and opportunities, we need to understand the likely future landscape for students and students' unions. We need to be clear on what our key drivers are – by which we mean the major forces or trends that could positively or negatively shape the future of the student movement (*source: Voluntary Sector Strategic Analysis 2008/09 NCVO Third Sector Foresight*).

We believe the key drivers impacting on the student movement are:

### Changes in Students' Union Funding Sources

- We anticipate a continued and significant reduction in bar sales (which halved nationally from £120m in 1998 to £60m in 2008), dramatically changing the funding models of higher education students' unions. This in turn could result in membership of NUS Services declining to 50–80 unions trading viably (without subsidy). A diminishing purchasing consortium could lessen our purchasing power and weaken one of the key benefits of NUS membership.
- Most students' unions have reoriented their primary focus on to representation and membership services, away from commercial services. At least 15 unions across the UK have divested their commercial services in the last five years for a number of different reasons. HE students' unions could become increasingly dependent on funding from their university or college which could have a detrimental impact on students' unions' influence and independence. We have already witnessed an increase in service level agreements (or contracts for specific services) between HE students' unions and their college or university. In 2007/08 15 per cent of students' union block grant money was ring-fenced funding in exchange for services provided on behalf of the college or university (*source: AMSU Survey 2008*). For many HE students' unions ensuring a positive working relationship between the students' union and the university or college will become increasingly important for reasons of sustainability. With institutions as the primary funder, students' unions will increasingly need to demonstrate value to their higher education institution or further education college.
- In addition, as a result of the current economic conditions, higher education could well see cuts in funding in real terms and is likely to have a tough time in the next Comprehensive Spending Review (CSR). Cuts in institutional funding could be passed on to students' union block grants.
- Many unions have accumulated successive years of deficits which will have negatively impacted on students' union reserves, liquidity and therefore ability to invest. Over the past two years NUS has experienced a marked increase in the number of students' unions contacting national officers or staff to support a students' union in what is probably best termed as 'crisis' situations, normally brought about by a financial crisis, attempted university takeover, departure of one or more senior managers or wider organisational failing. We need an agreed student movement response for how we deal with these circumstances going forward.
- Like many organisations, students' unions are members of pension schemes carrying significant deficits, whether that be SUSS, USS or other

schemes. This is a potential time bomb which needs a bold strategic approach to ensure this deficit is being managed down and risk is mitigated.

- As a result of the above, and due to other rising costs above inflation (eg salaries, additional pension costs and student staff wage rates), all students' unions are looking for value for money and ways to save expenditure. Many students' unions are undertaking collaborative ventures to increase operational efficiencies whilst improving service delivery, as is the case with trade unions, the private and third sector. Notably, a number of eminent charities have gone down this route primarily to focus resources to maximise the impact on service users and also to streamline their business costs (especially back office functions).
- There are, however, new trading and service opportunities on and off campus that should be investigated and exploited. Services that may have traditionally been run by universities could in the future be run by students' unions (eg job shops, coffee shops, lettings and possibly even accommodation) if unions can demonstrate that they can add sufficient value to successfully deliver these services (with robust business cases), thus improving the student experience.
- The need for students' unions to register with the Charity Commission in England and Wales will open up new funding opportunities from grant-making, trust-awarding and other funding bodies. It is likely however that there will need to be an upskilling in fundraising capacity and capability if students' unions are to exploit these funding opportunities. Whilst there could be a tension between students' unions competing against each other for fundraising opportunities, there are clear opportunities for regional or partnership bid submissions.
- If students' unions are to seize such new opportunities and if the student movement is to cope with the challenges of the next five years

and beyond there is a need to systematically develop their staff leadership and management – not just at senior management level but at all levels. In particular, we need to be developing the next generation of students' union senior managers by investing in middle managers and frontline staff, offering a clear career path in the student movement for these employees. In addition, if we are to recruit talent in to the student movement we will in part need to change public perceptions of students' unions to communicate their size, impact, complexity and values, presenting the student movement as a respected career option.

- Throughout the country, and particularly in HE students' unions, there are increased regulatory and legislative requirements which could absorb significant management time and will place an onus on students' unions to demonstrate their public benefit and impact.
- The demise of the Learning and Skills Council, with the resulting transfer of funding to local authorities, may afford opportunities for additional resources for FE students' unions, through local partnerships between providers, users and local councils. Many of these partnerships may have a natural synergy between higher education agreements and further education colleges, as many of the partnerships have co-terminal boundaries, presenting further opportunities for local representation.

## A Hyper-Diversity within the Student Body, the Education Sector and Students' Unions

- The phrase 'hyper-diversity' is used to describe how we are witnessing diversity at multiple levels – within the student body, across the education sectors, geographically, across institutions and students' unions.
- The student body has changed considerably in the past 15 years with mass expansion resulting in 2.38 million students studying in higher education



(source: HESA 2006/07) and approximately 5 million studying in further education. Over the next five years we anticipate seeing an increase in international students with demand for approximately 325,0000 places in 2010 growing to 511,000 in 2020 (source: *Vision 2020, British Council*). However, a 12 per cent drop in the number of 18–20 year-olds between 2010/11 to 2020/21 is likely to have a negative impact on growth in student numbers (source: *HEPI Report, Demand for Higher Education to 2020 and beyond*). Similarly, the implications of the current economic conditions mean that the Government have asked HEFCE to cap the growth in student numbers from 2010 until the economy improves.

- There has been a steady growth in the number of postgraduate students over the past 10 years and one could assume this trend will continue, although it is unknown whether the current global economic crisis will positively or adversely impact on numbers. Between 1996/97 and 2005/06 total postgraduate numbers increased by 66 per cent. However, it is worth noting that over 55 per cent of postgraduate students are part-time and therefore probably working or off campus for the majority of their time. In addition, a high proportion of postgraduate research students are international students who could be less inclined to study abroad as a result of the global recession (source: *UUK Patterns of HE, 7th Report*). The student movement has historically been weaker at representing postgraduate students and will need to build on existing good practice and look to new forms of engagement if we are to raise the quality and impact of postgraduate representation.
- As universities look to increase student numbers and achieve economies of scale we are likely to see an increase in mergers, strategic alliances and campuses established abroad. This will clearly impact both on the student experience and students' unions (many of whom have already experienced mergers).
- There is a clear drive by the Government to meet the targets within the Leitch Review (2006) which aims to dramatically raise skill levels in the UK by making learning more flexible. This has influenced the decision to raise the educational leaving age to 18, the introduction of 14–19 diplomas and is likely to see an increase in part-time students, distance learners, a credit-based approach to learning, work-based learners, apprenticeships and people undertaking continuing personal development (CPD). Universities could indeed accredit internal business CPD, though the introduction of Train to Gain was intended to deliver employer-led skills, presenting a tension between the needs of the university and business with the needs of the learner potentially being squeezed in the middle. Students' unions will need to respond to this more flexible style of learning if they are to effectively represent these students.
- Furthermore, largely as a consequence of a high density of students within a particular community and 'town and gown' relationships we are seeing a blurring between the facilities offered by universities/students' unions and the local community. Students' unions will need to consider how they respond to this when, for example, a student living at home or studying part-time may see less benefit in, say, sports facilities when they are already integrated within their local community. Indeed, the physical presence of the students' union building could in many instances play less of a role in the importance of a successful union in the future. That said, for many students' unions physical space will still be important to facilitate activities and contribute to the student experience. There is an opportunity to re-think and re-engineer students' union social space to ensure it is more explicitly supporting the student learning experience by creating a more accessible, non-alcoholic and learner-centred environment.
- The education sector is becoming more diversified and fragmented with boundaries between FE and

HE blurring. 7 per cent of HE is delivered in further education colleges and this will grow with colleges being able to apply for Foundation Degree Awarding Powers. Accordingly, students' unions will become much more diverse with differing needs. For instance, a students' union at an institution specialising in work-based learning and CPD will have very different needs from one at a campus-based institution with a primarily undergraduate population.

- We have already witnessed the emergence of mission groups as universities attempt to differentiate their offer which has been mirrored by students' union mission groups. For example, the 1994 Group have placed the 'student experience' at the heart of their marketing proposition. Even within these mission groups there is diversification and differing needs to meet. In addition, the devolved education systems across the UK in England, Wales, Northern Ireland and, in particular, Scotland present a differentiated landscape and further layer of complexity. And potentially, we may also see the rise of both for-profit institutions (such as the College of Law) and not-for-profit bodies (such as the Rathbone Society) who receive degree awarding powers.
- The above presents considerable challenges to a collectivist model as rarely, if ever, can the national organisations provide 'one-size-fits-all' support to students' unions. Services, activity and support from the national organisations need to be tailored to meet the differing needs of different organisations. Alternatively, the national organisations could reduce the scope of their work and simply focus their activities on those services that are core and common to all students' unions such as work on the learner/ student voice.

## The Importance of the Student Voice

- There is significant interest at a national and local level on the importance of student engagement and this interest is unlikely to go away. We would identify this as the ultimate strategic challenge and priority for the student movement. Partly driven by the need to respond to the student 'consumer voice' in a differentiated fees system and in part due to a willingness to make learning a partnership of co-production between the student/ learner and the academic, we are witnessing an unprecedented degree of interest in the importance of the student voice in shaping all aspects of the learning experience – whether that be about contact hours, the curriculum, the quality of teaching or the state of university accommodation. All these are critical components of the student learning experience.
- Universities spend a considerable amount of time considering their National Student Survey (NSS) results and developing strategies in response to this data. This is reinforced by a constant flow of market research undertaken within FE and HE to monitor quality and to gather student feedback. Indeed, a regulatory quality framework underpins universities and colleges whereby decisions are rarely taken at an institutional level that don't consider student engagement. As an example of this, the Student Written Submission (SWS) plays a key and central role within any institutional audit. Within further education, we have seen legislative changes that place a duty on colleges to include student representation on governing bodies and the need to embed Learner Involvement strategies.
- At a national level, The Higher Education Academy has established student subject centres and the QAA are running a pilot project where students will sit as members of the audit panel for Institutional Audit in England and Wales (following Scotland's lead). The Government has established both the National Learner Panel (for FE) and the National Student Forum (for HE), as well as holding several student juries across the country 'to amplify the student voice'.
- As the Government, further and higher education institutions develop their own forms of direct engagement and research on student needs, often



bypassing student-led organisations, the challenge to the student movement is how do we demonstrate the legitimacy and value of student-led organisations in truly representing the many voices of a diverse student body? Students' unions will have to be skilled in both gathering knowledge and intelligence about the different needs of student groups and 'interpreting' the articulated needs of different students. Indeed, it is the interpretation of the student voice which has been, and should remain, a point of differentiation compared to market research companies.

- The 2008 NUS/ HSBC Student Experience Survey revealed that 92 per cent of students are given the opportunity to provide feedback about their course but only 51 per cent of these students believe that it is acted on. 23 per cent of students feel involved in shaping the content, curriculum or design of their course compared to 57 per cent that wanted to be (*source: NUS/HSBC Student Experience Survey*). In the 2008 National Student Survey, whilst 82 per cent of students said they were happy with their course, under half (44 per cent) said that the feedback they received was often late, and when it arrived, was unhelpful (*source: National Student Survey 2008*).
- A cross-sector group on student engagement chaired by NUS and made up of various stakeholders with an interest in student engagement within HE (including the Government, the Funding Council and sector agencies) has met for over a year and is developing proposals to deliver a step change in empowering the student voice through academic and course representation. Existing good practice on course representation, such as that which exists in Sparqs (Student Participation in Quality Scotland), can be built on and enhanced across the UK at both a national and local level. In addition, the 2006 FE White Paper specifically refers to the potential for an agency to raise the quality of FE course representation, presenting opportunities.
- Students have higher expectations in a fee paying system and expect a quality, value-for-money learning experience. The uncertainty of future fees regimes and the potential for an unregulated fees system in England, and possibly across the UK, poses major challenges to the student movement. The centrality of a vocal and effective student voice will be critical as we face down attempts to introduce a marketised higher education system.

## Changing Student Lifestyle and Participation

- Debt remains a major issue for students. Two-fifths of students have a bank overdraft and a third of students have debts on their credit cards. On average, students have several forms of debt. By far the most common form of debt is the student loan. Younger students are more likely to take out a loan, with two-thirds aged between 18 and 21 years (*source: NUS Services Student Lifestyle Report*). 34 per cent of students said they were more than somewhat concerned about their current levels of debt (*source: NUS/ HSBC Student Experience Survey*).
- The current economic climate is having considerable and worrying consequences for students who are facing increased costs now as well as graduating at a time of recession where fewer jobs are available. A recent study found recruitment targets among 100 top UK firms had been cut by 17 per cent for 2009 (*source: High Fliers Research*). The Government, in response, have announced a Graduate Internship Scheme whereby graduates unable to find work would undertake an internship for three months, though it is unlikely that this will have a widespread impact.
- With the increase of 'in house' entertainment and rise in alcohol sales in supermarkets (overtaking the licensed trade for the first time) more students are staying at home for leisure time. In respect of students' social lives there are clear differences between various age groups. Younger students have a tendency to socialise at nightclubs and bars, both on the high street and

at students' unions with half of 18–21 year olds preferring to go to High Street nightclubs compared with only a tenth of those aged 25 years or over. 40 per cent of younger students go to High Street bars compared with only 20 per cent of older students, while a further 40 per cent of younger students prefer to go to students' union bars compared with a mere tenth of older students. Similarly, undergraduates as opposed to postgraduates are more likely to socialise at students' union bars and nightclubs (*source: NUS Services Student Lifestyle Report*).

- Students are increasingly interested in ethical purchasing. Whilst price and convenience are the most important things that influence students' decisions to purchase certain products at least a third of students are thinking more conscientiously about what they buy, and where they buy it from. 61 per cent of students said if a brand owner has a bad ethical/ environmental reputation it influenced their decision to purchase a particular product. A further 38.3 per cent shop locally, at organic/vegan supermarkets or at co-operative grocers (*source: NUS Services Student Lifestyle Report*). The total 'ethical market' is up 15 per cent to £35.5bn in 2007 (*source: Co-operative Bank*).
- 75 per cent of students are in paid employment, 35 per cent during term-time with those students working on average 14 hours. 46 per cent of working students are reliant on paid employment to fund their basic living expenses. The more hours a student works during term-time the greater negative impact on their academic study (*source: NUS/ HSBC Student Experience Survey*).
- Faced with increasing choice and lifestyle pressures, for many students, time is at a premium. This presents real challenges for students' unions to drive up participation levels and ensure student involvement in activities, representation, democracy and governance.
- Student activities are an essential part of both the student experience and students' union life for most HE students' unions. In order to be effective

representative bodies, students' unions need to truly engage students. This is most successfully achieved through engendering a sense of community. In many unions, student activities and social facilities are critical components that contribute to the student community and add significantly to student life, the student experience and the wider learning experience (co-curricular learning). Student activities in particular play a vital role in developing transferable skills delivering the more 'rounded graduate' and enhancing employability prospects. Whilst we will need to find new ways of engaging the student body and expanding a sense of community (perhaps online), in many institutions student activities and physical space will continue to be the 'glue' that generates social capital.

- Research shows prospective students are most interested in a university's employability record, day-to-day support and cost (*source: HEIST*) and in a mass education system there is a need to demonstrate transferable skills to enhance employability and to differentiate oneself from other graduates. Following the demise of STADIA, there is potentially a gap that needs to be filled in delivering national support (that goes beyond simply networking and training opportunities for staff and officers) for student activities and initiatives that enhance employability and transferable skills (specifically for clubs, societies, faith groups, community volunteering, wider skills programmes and student activities such as Give it a Go). In further education, the expansion of compulsory education up to the age of 18 and the introduction of Adult Learning Grants for students up to the age of 25, may grow the capacity for volunteering within the sector.
- The Government is attempting to promote participative democracy (as articulated in the Governance of Britain Green Paper and the 2008 Government Empowerment White Paper). Throughout civil society organisations and across all political parties we have seen a rise in interest in the principles of mutualism and the cooperative

movement. These are core values of the student movement (ie being run by and for students) and there may be opportunities for the student movement to exploit this wider interest amongst civil society organisations about mutual ways of working. We believe there are considerable opportunities for the student movement to learn from and work in partnership with the cooperative movement – whether that be sharing good practice with the Cooperative College, applying cooperative principles to university accommodation, establishing trading opportunities with the Cooperative Group or incorporating cooperative thinking to other university services and activities.

- Equally, if we are to be beacons of best practice in this respect the student movement will need to reinvent how we engage and connect with a diverse student body which faces significant time pressures and major barriers to participation. This poses questions on how we continue to reinvent and revive students' union governance, student involvement, democratic participation and student activism. In addition, what effect will the current cohort of school students who experienced the compulsory citizenship agenda and the growth of school councils (through the adoption of the Whitty Report into School Councils 2008) have when they arrive into further and higher education?

## The Rise of Digital Media

- Effective use of technology will become increasingly important in the digital age, enabling the energy and enthusiasm of individual student actions to be harnessed, with ICT providing new opportunities for both individual and collective action. New ways of communicating and participating have the potential to transform an organisation (*source: Voluntary Sector Strategic Analysis*). Social networking, amateur publishing, collaborative production (wikis) and citizen journalism provide new opportunities for engagement presenting significant advantages in terms of mobilisation and user ownership (as

witnessed in Barack Obama's Presidential victory), presenting a great opportunity for the student movement. A good example of where technology has been exploited in this way is NUS' award-winning campaign against HSBC in 2007, following the bank's attempt to charge graduates interest on their overdrafts at short notice.

- Similarly because social networking sites are changing the way people interact, digital media opens up great opportunities for students' unions to engage students in representation, new forms of governance, as well as the generation of social capital. The student movement has to be comfortable with utilising these new communication tools and inhabiting this space. Technology enables us access to 7m students – can we anticipate the next change? The Internet is going mobile with 5.7 million using a mobile to access the net in January 2007 (*source: Telephia and comScore*)
- In 2007 an estimated £40 billion was spent online (*source: Official Office of National Statistics*). In 2020 this is expected to reach £162 billion.
- Since 2006 spending time on the internet exceeded TV (16–25 year olds) with 70 per cent of students using the internet to maintain relationships (*source: Tech Tribe Report*).
- Technology has changed how students study, increasing collaboration between each other and academics. It has the potential to give students a greater voice in the way they learn. We have already seen an increase in the use of Virtual Learning Environments (VLEs) and are now seeing technology used in innovative ways throughout learning such as the delivery of podcasts used for feedback and the creation of personalised learning environments (*source: JISC*). NUS, funded by BECTA (the government agency leading the national drive to ensure effective and innovative use of technology throughout learning) are undertaking a project to research and champion e-learning best practice in further education.



- The growth of the internet has presented challenges to the national organisations of the student movement. For instance, briefings or research generated by NUS can be accessed by both non affiliates and affiliates, undermining one of the traditional benefits of membership. We have, in effect, seen the death of intellectual property. However, successful organisations in the future will be able to act as a trusted source of information. Effective brand positioning will be critical in this respect.

We must prepare and plan now to effectively respond to this changing landscape. It will require new solutions to new challenges, whilst retaining the core values that make us what we are.

The student movement has changed many times in its history to respond to changing landscapes. We believe that if we confront these threats and opportunities head on, developing and delivering a bold and effective strategy that addresses these drivers, the student movement will be considerably stronger than it is now and we will truly be making students' lives better.

# Appendix One: Jargon buster

**The student movement:** students' unions and their various components (officers, volunteers, staff) and their national organisations (eg NUS, NUS Services Ltd., AMSU).

**NUS:** the National Union of Students UK, a confederation of 600 students' unions and the representative voice of over 7 million students.

**NUS Services Ltd. (NUSSL):** Trading company for the student movement, creating, developing and sustaining competitive advantages for students' unions. Members have to be in NUS. NUS is a 25 per cent shareholder, with students' unions owning the remaining 75 per cent.

**AMSU:** the Association of Managers in Students' Unions supports professionals in students' unions. Members (students' unions) do not have to be in NUS.

**Drivers:** the major forces or trends that could positively or negatively shape the future of the student movement.

**Future landscape:** an analysis of the key drivers an organisation or industry is facing and a diagnosis of their implications.

**Purpose:** a statement of what we are here to do.

**Values:** the core beliefs that make us unique.

**Students' union funding models:** the income streams that constitute how a students' union pays for its activities.

**Comprehensive Spending Review (CSR):** the Government's main tool for allocating its spending priorities.

**'Town and Gown':** where two distinct communities exist in a university town or city – 'town' being the non-academic community and 'gown' being the academic community.

**Leitch Review 2006:** Review commissioned by the Government and undertaken by Sandy Leitch to review the UK's long-term skills needs.

**Mission groups:** groups of universities who form strategic alliances around shared values and common purposes. Examples include the Russell Group (mirrored by students' unions in the Aldwych Group), 1994 Group (mirrored by students' unions through Unions 94) and Million+.

**Co-production:** A reciprocal relationship between the traditional 'target' user of a service and those who produce it, whereby the users (in our case students) feed into and improve the 'services' or 'products' directed at them (*source: Voluntary Sector Strategic Analysis*).

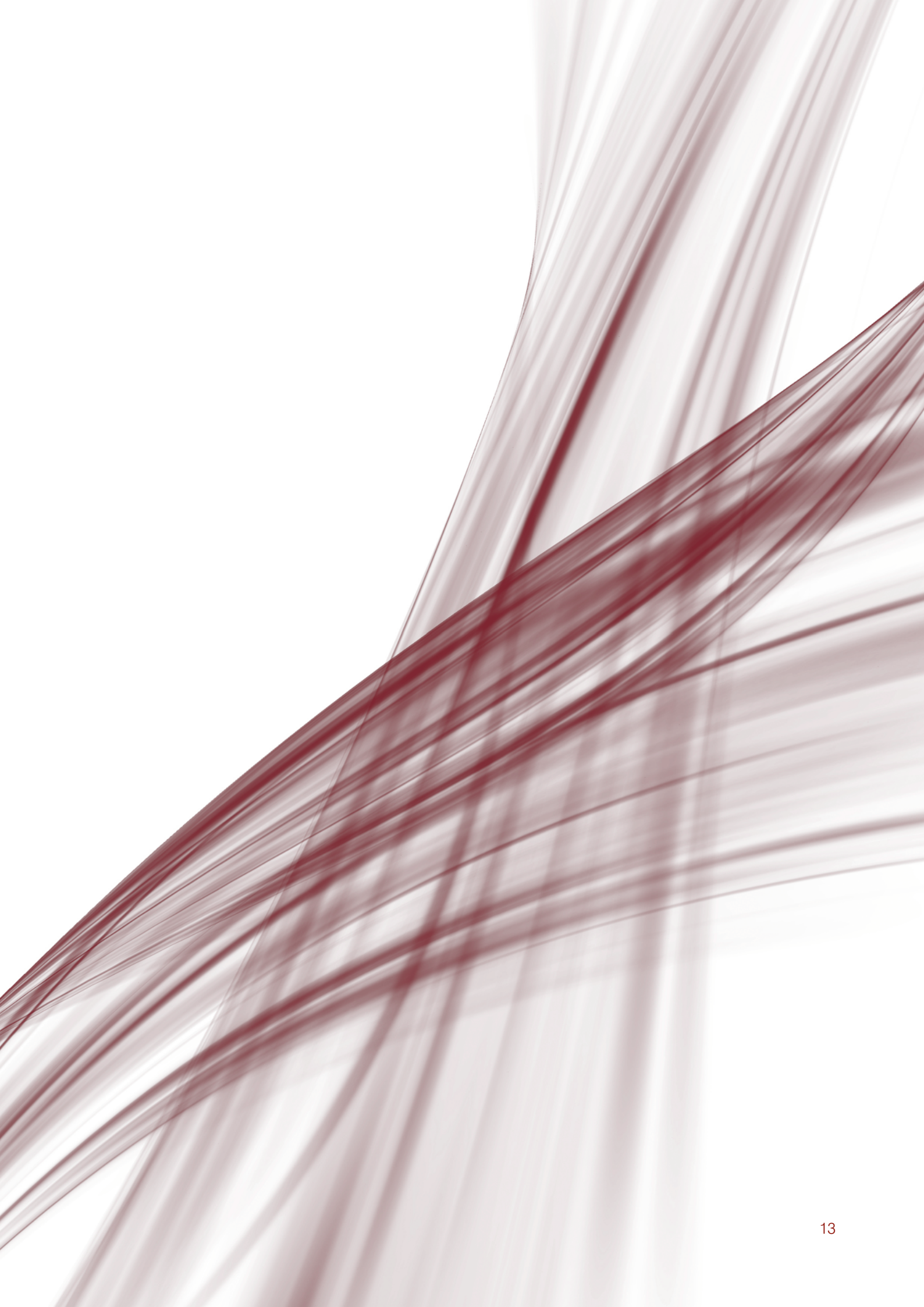
**NSS:** the National Student Survey has been running annually since 2005. It is a survey of mostly final year undergraduates, with the main purpose to help inform the choices of prospective higher education students about where and what to study (*source: Ipsos MORI*).

**Participative democracy:** Form of democracy in which citizens actively participate in democracy (*source: Voluntary Sector Strategic Analysis*).

**Give it a Go:** student activities programmes/ schemes run in students' unions which allow students to dip in to or try out an activity rather than having a sustained commitment as in the case of clubs or societies.

**STADIA:** a student activities network that provided support to students' union officers and staff







services limited

**National Union of Students**

2nd floor, Centro 3

19 Mandela Street

London NW1 0DU

t. 0871 221 8221

f. 0871 221 8222

w. [www.nus.org.uk](http://www.nus.org.uk)



national union of students