

# IHE Annual Survey 2025

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## Survey Guidance

Thank you for taking part in the IHE 2025 Annual Survey. Your contribution is essential in helping us build a comprehensive and up-to-date understanding of the independent higher education community and how providers are adapting to a changing regulatory environment. By sharing your priorities, concerns, and plans for the future, you're helping shape a clearer picture of the sector's evolving landscape.

The survey will close at 11:59pm on Thursday, 30 October 2025.

We welcome responses from both IHE member institutions and non-members delivering higher education in the UK. To ensure we accurately reflect your institution's position, we kindly ask that you complete the survey as thoroughly as possible. Each organisation should submit only one response, so please coordinate internally to provide the most complete and representative information.

The survey will take approximately 30-45 minutes to complete. We will ask about your student and staff numbers, course offering and regulation. We will also ask about your financial position, costs of regulation and international activity. You may want to consult the questions overview ([LINK](#)) to make sure you have the right information to hand. You may save your progress at any point and return later by selecting the 'Save and Continue Later' option, but do come back to finish as only complete responses can be included.

All responses will be handled in accordance with the UK General Data Protection Regulation (GDPR). Any personal data you provide will be stored securely, used solely for research and reporting purposes, and will not be shared with third parties without your consent. For full details, please refer to our Privacy Policy. If you no longer wish your response to be included please let us know on [info@ihe.ac.uk](mailto:info@ihe.ac.uk) as soon as possible and before the closing date.

For the best user experience, we recommend completing this survey in full-screen mode. This ensures optimal formatting and visibility of all questions, particularly those with tables or multiple response options. Using the full screen mode on a desktop or laptop device is advised to avoid display issues that may occur on smaller screens.

## Provider Details Q1-Q7

1. Are you a member of Independent Higher Education (IHE)? \*

Yes

No

2. I would like to be contacted by IHE with more information about membership. \*

Yes

No

3. Name of provider: N.B. Please ensure only one submission is made per provider. \*

Academy of Live Technology

Accent Global Learning

ACM

AD Education (you are filling out this survey on behalf of both SAE Institute and ICMP)

Aga Khan University

Al-Maktoum College

Architectural Association School of Architecture

BAJ

BCNO Group

Bird College – Conservatoire for Dance and Musical Theatre

Bloomsbury Institute London

BrandEd (you are filling out this survey on behalf of both Vogue and Sotheby's)

British Psychotherapy Foundation (BPF)

Cambridge Education Group

Central Film School

Chickenshed

Christ The Redeemer College London

CIEE

Collective Acting Studio

College of Medicine and Dentistry

College of Osteopaths

- Corndel College London
- CSVPA
- David Game Higher Education
- Engineering Institute of Technology
- Escape Studios
- ESCP
- Fashion Retail Academy
- Further Learning Group
- Futureworks
- Global Institute of Sport
- House of Sassoon
- IBCM
- ICMP (not including SAE Institute)
- Inchbald School of Design
- Institute for Equity, University Centre
- INTO University Partnerships
- ION
- Instituto Marangoni
- JGA Group
- Kaplan International Colleges U.K. Limited
- Kensington College of Business
- LCK Academy
- Le Cordon Bleu
- Leiths Education
- Leo Baeck College
- London Churchill College
- London School of Management Education
- Matrix College of Counselling and Psychotherapy
- Metanoia Institute
- National Design Academy (not including NMA)
- National Motorsport Academy (not including NDA)
- Nazarene Theological College
- NCUK

- NDA Foundation (you are filling out this survey on behalf of both NDA and NMA)
- Newbold College of Higher Education
- NMITE
- Norland
- Oak Hill College
- OLC Europe
- OMNES Education
- Oxford International Education Group
- Pen Green
- Pointblank Music School
- QA Higher Education
- Raindance Film School
- Richmond American University London
- Roffey Park Institute
- Royal Academy of Arts (RA schools)
- Royal Academy of Dance
- Rushmore Business School - UK
- Ruskin Mill Land Trust
- SAE Institute (Not including ICMP)
- Sotheby's Institute of Art (not including Vogue)
- SP Jain London School of Management
- Study Group
- Tavistock and Portman
- The College of Legal Practice
- The Counselling Foundation
- The Dyson Institute of Engineering and Technology
- The Engineering & Design Institute London
- The London School of Architecture (not including the wider UBE)
- The University of Buckingham
- Thinkspace
- Tiro Training Limited
- UCFB
- Universal Centre of Sport (UCS)

- University of the Built Environment (including LSA)
- University of the Built Environment (not including LSA)
- Vogue College of Fashion (Not including Sotheby's)
- Walbrook Institute London
- Waltham International College
- WaterBear
- West Dean College of Arts and Conservation
- Other group (please specify)

4. Name of person completing this survey \*

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5. Email address of person completing this survey. \*

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6. Where is your institution's main UK campus located? \*

- London
- South East England
- South West England
- East of England
- West Midlands
- East Midlands
- Yorkshire and The Humber
- North West England
- North East England
- Scotland
- Wales

Northern Ireland

Online only



7. In which regions do you have additional campuses? (select all that apply) \*

London

South East England

South West England

East of England

West Midlands

East Midlands

Yorkshire and The Humber

North West England

North East England

Scotland

Wales

Northern Ireland

Online

No additional campus

## About Your Higher Education Provider Q8-Q28

8. Which of the following best describes your corporate form? (Select up to two) \*

- Charity with primary charitable object to advance education
- Part of a larger charity with other charitable objects
- Company limited by shares (Public)
- Company limited by shares (Private)
- Not-for-profit company limited by guarantee
- Limited liability partnership
- Part of a larger UK-based corporate group
- Part of a larger corporate group based outside the UK
- Other (please specify)

9. Please select the organisation size that best reflects your institution. To meet the definition your provider must meet both of the criteria listed. \*

- Micro (9 or fewer employees / under £1m turnover)
- Small (49 or fewer employees / under £15m turnover)
- Medium (249 or fewer employees / under £54m turnover)
- Large (250+ employees / over £54m turnover)

10. Which of the following statements best describe your charitable mission beyond education (Select up to three) \*

- Supporting STEM and built environment education/industries
- Encouraging the arts and creative industries
- Medicine, dentistry and allied health education
- Training teachers or specialist education staff
- Theological vocation
- Specific industry/professional mission
- Entrepreneurship and incubating start-ups
- Supporting regions or other civic goals
- International education and cooperation

- Study abroad
- Widening participation and access to HE
- Charitable/not for profit
- Other (please specify)

## Office for Students

11. Please tick all boxes that reflect your current regulatory status.

### Office for Students (OfS) – Approved (Fee Cap) Provider

- Currently regulated / accredited
- Applied / in-process
- Planning to apply

### Office for Students (OfS) – Approved Provider

- Currently regulated / accredited
- Applied / in-process
- Planning to apply

12. When did you register with the Office for Students (England)? \*

- Between 2018 and 2019 (initial registration period)
- Between 2020 and 2022
- Between 2023 and 2024
- 2025
- Not applicable
- Unsure

## Department for Education

13. Please tick all boxes that reflect your current regulatory status.

### Department for Education (England) (DfE) – Skills Funding and Advanced Learner Loans

- Currently regulated / accredited

Applied / in-process

Planning to apply

#### **Apprenticeship Provider and Assessment Register (APAR) - Apprenticeships**

Currently regulated / accredited

Applied / in-process

Planning to apply

#### **Devolved Nations Funding and Qualifications**

14. Please tick all boxes that reflect your current regulatory status.

##### **Scottish Funding Council – Registered Provider (SFC)**

Currently regulated / accredited

Applied / in-process

Planning to apply

##### **Northern Ireland Department for the Economy – Specific Course Designation**

Currently regulated / accredited

Applied / in-process

Planning to apply

##### **Welsh Government - Specific Designation of Higher Education (HE) Courses**

Currently regulated / accredited

Applied / in-process

Planning to apply

##### **Student Awards Agency Scotland (SAAS) - Private Provider Designation**

Currently regulated / accredited

Applied / in-process

Planning to apply

##### **Scottish Qualifications Authority (SQA) – Approved Centre**

Currently regulated / accredited

Applied / in-process

Planning to apply

## Quality Oversight and Accreditation

15. Please tick all boxes that reflect your current regulatory status.

### Quality Assurance Agency for Higher Education (QAA) Review

Currently regulated / accredited

Applied / in-process

Planning to apply

### Educational Oversight Review

Currently regulated / accredited

Applied / in-process

Planning to apply

### Quality Enhancement Review (Wales)

Currently regulated / accredited

Applied / in-process

Planning to apply

### Gateway Quality Review (Wales)

Currently regulated / accredited

Applied / in-process

Planning to apply

### Higher Education Review and Annual Monitoring

Currently regulated / accredited

Applied / in-process

Planning to apply

### Tertiary Quality Enhancement Review (Scotland)

Currently regulated / accredited

Applied / in-process

Planning to apply

## Other Higher Education

16. Please tick the box that reflects your current regulatory status.

Office of the Independent Adjudicator for Higher Education (OIA) – Scheme Member

- Currently regulated / accredited
- Applied / in-process
- Planning to apply

## International Students

17. Please select the option that best reflects your student sponsor licence status:

UK Home Office – Licensed Student Sponsor (Track Record)

- No student sponsor licence
- Probationary student sponsor
- Licenced student sponsor (no track record)
- Licenced student sponsor (track record)
- Applied/in-process

UK Home Office – Licensed Student Sponsor (No Track Record)

- No student sponsor licence
- Probationary student sponsor
- Licenced student sponsor (no track record)
- Licenced student sponsor (track record)
- Applied/in-process

UK Home Office – Probationary Student Sponsor

- No student sponsor licence
- Probationary student sponsor
- Licenced student sponsor (no track record)
- Licenced student sponsor (track record)
- Applied/in-process

## Teaching Excellence Framework

18. If you have a Teaching Excellence Framework (TEF) award please select your award category

- Teaching Excellence Framework (TEF) – Gold Award
- Teaching Excellence Framework (TEF) – Silver Award
- Teaching Excellence Framework (TEF) – Bronze Award
- Teaching Excellence Framework (TEF) – Requires Improvement
- No award

## Awarding Powers and Academic Partnerships

19. Do you have any of the below awarding powers? \*

- New Degree Awarding Powers
- Taught Degree Awarding Powers
- Research Degree Awarding Powers
- Office of Qualifications and Examinations Regulation (Ofqual) – Awarding Powers
- Royal Charter
- Scottish Qualifications Authority (SQA) – Awarding Body
- None of the above
- Unsure

20. Do you intend to apply for any awarding powers in the next three years? \*

- New Degree Awarding Powers
- Taught Degree Awarding Powers
- Research Degree Awarding Powers
- Office of Qualifications and Examinations Regulation (Ofqual) – Awarding Powers
- Royal Charter
- Scottish Qualifications Authority (SQA) – Awarding Body
- None of the above

Unsure

21. Do you deliver any courses under a subcontract model, where the awarding body contracts with the student, and collects the fees/student finance? For more information see the IHE definition of subcontract [here](#). \*

Yes, as the teaching partner

Yes, as the awarding partner

No

Unsure

Other (please specify)

22. What academic partnerships do you currently have? For definitions please see [here](#). \*

Validation Partnership

Subcontract Partnership

Franchise Partnership

Joint Venture

Embedded College (as designated by UKVI)

Transnational Education partnerships

Other (please specify)

23. Have you been affected by the OfS decision to pause applications for registration and Degree Awarding Powers in December 2024? \*

No

Yes, our registration application was paused

Yes, we intended to apply for registration but were unable to

Yes, our DAPs registration application was paused

Yes, we intended to apply for DAPs but were unable to


Not applicable

## Regulatory Compliance

24. Approximately what percentage of your annual turnover is spent on regulatory compliance? \*

- Less than 1%
- 1-2%
- 3-5%
- 6-10%
- More than 10%
- Unsure/prefer not to say

25. Please tell us more about the costs associated with this compliance.

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26. How has the regulatory burden on your institution changed over the past three years? \*

- Increased
- Stayed about the same
- Decreased
- Unsure
- Prefer not to say

## Fees and Funding

27. Do you offer any of the below funding models for your higher education courses? \*

Private/Alternative student loans

- Payment plans
- Scholarships for UK students
- Scholarships for international students
- Sponsorship from industry bodies or companies (not linked to employment)
- Full or part employer-funding (linked to employment)
- Means tested bursaries or scholarships
- Scholarships or bursaries based on talent or aptitude
- None of the above
- Other (please specify)

28. What public funding have you received since 1 August 2023? \*

- Recurrent funding including teaching grant
- Capital grant (through application)
- Capital grant (formula-based)
- World-leading Specialist Provider Funding
- Performing Arts Funding (OfS)
- Dance and Drama Award funding (DADA)
- Research England formula-based funding
- Competitive funding from any Research Council
- Higher Education Innovation Funding (HEIF)
- Other Research England Funding
- Innovate UK Funding
- NHS education funding or other funding from NHS
- Department for Education funding (any direct funding)
- No public funding
- Other government funding (please specify)

## Courses and Delivery Models Q29-Q39

29. Which of the following qualifications does your institution currently offer or plan to offer? *(Please select one option per qualification as relevant. If you do not offer or plan to offer a qualification leave both options blank)*

### Pathway or access courses at level 3

Currently offer

Plan to offer

### Foundation Degrees

Currently offer

Plan to offer

### Undergraduate Degrees

Currently offer

Plan to offer

### Postgraduate Taught Degrees

Currently offer

Plan to offer

### Postgraduate Research Degrees

Currently offer

Plan to offer

### Degrees and awards awarded by overseas higher education providers

Currently offer

Plan to offer

### Chartered and Professional Body awards

Currently offer

Plan to offer

### Pearson awards (including BTECs and Higher Nationals)

Currently offer

Plan to offer

**Higher Technical Qualifications (HTQs)**

Currently offer

Plan to offer

**Other RQF/SCQF awards regulated by Ofqual/SQA**

Currently offer

Plan to offer

**Apprenticeships (degree level)**

Currently offer

Plan to offer

**Apprenticeships (below degree level)**

Currently offer

Plan to offer

**Further Education courses at levels 2 or 3**

Currently offer

Plan to offer

**Accredited short courses (UK credit-bearing)**

Currently offer

Plan to offer

**Unaccredited awards (not credit-bearing)**

Currently offer

Plan to offer

**Courses with accreditation from a Professional, Statutory, and Regulatory Body (PSRB) or similar professional body**

Currently offer

Plan to offer

**30. Which of the following delivery models does your institution currently offer or plan to offer? (Please select all that apply)**

**Part-time learning**

Currently offer (excluding teach out)

Plan to offer

**Block teaching (e.g. one subject/module at a time)**

Currently offer (excluding teach out)

Plan to offer

**o Condensed week/fewer specific study days per week**

Currently offer (excluding teach out)

Plan to offer

**Evening and/or weekend learning**

Currently offer (excluding teach out)

Plan to offer

**Online or distance learning**

Currently offer (excluding teach out)

Plan to offer

**Blended learning**

Currently offer (excluding teach out)

Plan to offer

**Accelerated programmes (e.g. 2-year degrees)**

Currently offer (excluding teach out)

Plan to offer

**Integrated degree with foundation year (4 years)**

Currently offer (excluding teach out)

Plan to offer

**Integrated degree with foundation year (3-year accelerated)**

Currently offer (excluding teach out)

Plan to offer

**Modular/credit-based learning**

Currently offer (excluding teach out)

Plan to offer

### Work-based learning

Currently offer (excluding teach out)

Plan to offer

### Overseas/transnational delivery

Currently offer (excluding teach out)

Plan to offer

### Closed courses for corporate or external partners (any length)

Currently offer (excluding teach out)

Plan to offer

### Integrated degree with masters (3-year accelerated)

Currently offer (excluding teach out)

Plan to offer

### Short Courses, LLE and regional skills provision

31. Do you offer short courses (credit-bearing or unaccredited courses that by themselves do not lead to a full qualification)? \*

Yes, this is a major part of our provision

Yes, we offer some short courses

No, but we are planning to offer short courses

No, and we have no plans to offer short courses

32. Please tell us about the types of short courses you are planning to offer.



33. What types of short courses do you offer? For each type of short course you provide, please indicate the relevant characteristics by selecting all that apply. \*

**Recreational/Community**

- Credit-bearing
- Available Online
- Available to International Students
- Part of Industry Partnerships
- Not Applicable

**Academic**

- Credit-bearing
- Available Online
- Available to International Students
- Part of Industry Partnerships
- Not Applicable

**Professional Training**

- Credit-bearing
- Available Online
- Available to International Students
- Part of Industry Partnerships
- Not Applicable

**Corporate Closed Courses**

- Credit-bearing
- Available Online
- Available to International Students
- Part of Industry Partnerships

Not Applicable

34. Please provide estimated student numbers (headcount) for your recreational/community short courses in 2024/25: Students who started a course at any point between 1 August 2024 and 31 July 2025.

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35. Please provide estimated student numbers (headcount) for your academic short courses in 2024/25: Students who started a course at any point between 1 August 2024 and 31 July 2025.

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36. Please provide estimated student numbers (headcount) for your professional training short courses in 2024/25: Students who started a course at any point between 1 August 2024 and 31 July 2025.

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37. Please provide estimated student numbers (headcount) for your corporate closed short courses in 2024/25: Students who started a course at any point between 1 August 2024 and 31 July 2025.

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38. For your short courses, which of the following apply? *(Please select all that apply)*

Students can progress from these courses to our higher education qualifications (articulation)

These courses can lead to entry to higher education qualifications elsewhere (articulation)

These courses are stackable (can be combined toward a larger qualification)

- We conduct student satisfaction surveys at the start of courses
- We conduct student satisfaction surveys at the end of courses
- We track student progression after course completion
- We offer recognition of prior learning (RPL) based on these courses

39. What are your intentions regarding short courses and the Lifelong Learning Entitlement (LLE)? *(Please select all that apply) \**

- We plan to convert some existing short courses into LLE-funded modules
- We are developing new credit-bearing short courses for LLE
- We will use existing modules already part of a larger qualification for LLE
- We are exploring partnerships to deliver LLE-eligible provision
- We are not planning to engage with LLE at this time
- We are unsure about our LLE plans
- Not applicable to our mission

## Student Numbers and Demographics Q40-Q42

40. Do you submit data to HESA (Higher Education Statistics Agency)? \*

- Yes, as part of regulatory requirements
- Yes, voluntarily
- No, but my data is included as part of a partner submission
- No
- Unsure

41. Please indicate the student number band that best corresponds to your full-time equivalent (FTE) Level 4 (RQF/FHEQ)/Level 7 (SCQF) student numbers for the 2024/2025 academic year. (For OfS-registered institutions, please select the appropriate band from the OfS classification).

\*

- A - Up to 25 full time equivalent students
- B - 26-50 FTE
- C - 51-75 FTE
- D - 76-100 FTE
- G - 101-300 FTE
- H - 301-500 FTE
- J - 501-1000 FTE
- K - 1001-1500 FTE
- L - 1501-2500 FTE
- M - 2501-5000 FTE
- N - 5001-10,000 FTE
- O - 10,001-20,000 FTE
- P - 20,001+ FTE
- Unsure
- Prefer not to say

42. Are any of the below student groups prominent in your student body today or a particular focus for future recruitment (*Please select all that apply*) \*

- International students

- School leavers
- Part-time learners
- Working professionals
- Career changers
- Students from underrepresented backgrounds
- Students with disabilities
- Military veterans
- Entrepreneurs and business owners
- Creative and arts professionals
- STEM professionals
- Healthcare professionals
- None of the above
- Other (please specify)

## Skills and Partnerships with Industry Q43-Q47

43. Does your institution currently have partnerships with industry, including employers, industry bodies, or other sector representatives? \*

- Yes, extensive partnerships across multiple sectors
- Yes, some partnerships across multiple sectors
- Yes, partnerships in our specialist area
- Yes, limited partnerships
- No, but actively seeking partnerships
- No, not a current priority

44. In what ways does your institution partner with industry? *(Please select all that apply)* \*

- Curriculum design or delivery
- Facilitating professional networking or mentoring for students
- Provision of corporate training or CPD to employees
- Delivery of apprenticeships
- Placements or work-based learning opportunities
- Collaborative research activities
- Other (please specify)

45. Which of the following policy proposals would best support your institution to expand provision? *(Select up to 3)*

- Introduction of technical awarding powers (Levels 4-5 only)
- Expanded employer co-funding for higher education (modular or by qualification)
- More flexible credit-based funding
- Employer levy extension to cover professional training
- Recognition of prior learning (RPL) or credit transfer frameworks
- Open and accessible Apprenticeship Provider and Assessment Register (APAR)
- o Quality and standards regulation adapted to support new delivery models

Better information, advice and guidance for students on more modern models of higher education delivery

46. Are you engaged with any of the following local/regional skills initiatives? *(Please select all that apply) \**

- Skills Bootcamps
- Local Skills Improvement Plans (LSIPs)
- Mayor's regional skills programmes
- Local Enterprise Partnership activities
- Local authority skills initiatives
- Chamber of Commerce skills programmes
- Collaborative activity with local colleges or schools
- None of the above
- Other

47. What would be the most effective way for government to support independent providers in regional skills delivery? *(Select up to three) \**

- Formula funding for skills provision delivered through national funding bodies
- Formula funding for skills provision delivered by regional governments
- Longer-term funding commitments
- More communication of opportunities
- Better coordination between different funding streams
- Clearer guidance on eligibility and requirements
- Simplified application processes for programmes and funding
- Support for partnership and collaboration between providers and with industry
- Funding opportunities place greater weight on current/past experience working with industry
- Reduced ongoing regulatory burden for delivering skills courses
- Other (please specify)

# Recruitment, Admissions and Widening Access Q48-Q50

## Understanding contextual admissions

48. What admissions criteria do you use? *(Please select all that apply)* \*

- Academic qualifications (A-levels, international baccalaureate diploma or similar)
- Technical or vocational qualifications (T-levels, BTECs or similar)
- Portfolio submission
- Audition/practical demonstration
- Interview process
- Professional experience
- Industry references
- Aptitude tests
- English language requirements
- Other (please specify)

## Widening access activity

49. What widening access activity does your institution undertake? *(Please select all that apply)* \*

- Outreach events / activities in schools or colleges
- Mentoring schemes for prospective learners
- Skills and training provision for adult learners
- Other community engagement activities
- Provision of scholarships and bursaries
- Flexible or alternative entry requirements
- Foundation or access programmes or modules
- Participation in regional programmes (e.g. Uni Connect, Saturday Clubs)
- Not applicable
- Other (please specify)

50. Over the past 12 months, how have student enrolments changed at your institution?  
*(Please tick one box per row to indicate the nature of change) \**

**UK students**

- Increased
- No Change
- Decreased

**EU students**

- Increased
- No Change
- Decreased

**Non-EU international students**

- Increased
- No Change
- Decreased

# Student Experience Q51-Q52

51. Please indicate which student support services you currently provide and which you are looking to introduce \*

## Academic skills support

- Currently provide
- Planning to provide
- Not applicable

## Accommodation services

- Currently provide
- Planning to provide
- Not applicable

## Careers and employability support

- Currently provide
- Planning to provide
- Not applicable

## Chaplaincy or spiritual support

- Currently provide
- Planning to provide
- Not applicable

## Digital skills and IT support

- Currently provide
- Planning to provide
- Not applicable

## Disability support services

- Currently provide
- Planning to provide
- Not applicable

## Financial advice and support

- Currently provide

Planning to provide

Not applicable

### **International student support**

Currently provide

Planning to provide

Not applicable

### **Mental health and wellbeing services**

Currently provide

Planning to provide

Not applicable

### **Mentoring schemes**

Currently provide

Planning to provide

Not applicable

### **Personal tutoring**

Currently provide

Planning to provide

Not applicable

### **Student social activities**

Currently provide

Planning to provide

Not applicable

### **Support for those affected by harassment or sexual misconduct**

Currently provide

Planning to provide

Not applicable

### **Immigration advice for students**

Currently provide

Planning to provide

Not applicable

52. What tools do you use to support the student voice in your institution? *(Please select all that apply) \**

- Student / course representatives
- Annual student surveys (excluding NSS)
- Ad hoc student surveys
- Focus groups
- Module evaluation forms
- Independent constitution and budget control
- Student group or council (independent constitution and budget control)
- Student on governing body/board (voting or non-voting)
- Student on academic board or equivalent
- Student-staff committees
- Online feedback platforms
- Exit interviews for non-completing students
- Social media monitoring
- Annual or more frequent review of student complaints and appeals

# Strategic Outlook and Opportunities Q53-Q60

## Institutional demographics

53. Looking ahead to 2026/27, how do you predict student enrolments to change at your institution? \*

### UK students

- Increase
- No Change
- Decrease

### EU students

- Increase
- No Change
- Decrease

### Non-EU international students

- Increase
- No Change
- Decrease

54. Looking ahead to 2026/27, how do you predict staff numbers to change at your institution? \*

### UK staff

- Increase
- No Change
- Decrease

### EU staff

- Increase
- No Change
- Decrease

### Non-EU international staff

- Increase

No Change

Decrease

## Financial outlook

55. How confident are you that the current funding model in your country (England, Wales, Scotland, NI as appropriate) for higher education is financially sustainable?

Very confident

Somewhat confident

Not very confident

Not confident at all

56. Are you undertaking strategic action to improve your financial position? \*

No

Making redundancies

Exploring additional investment

Exploring mergers or acquisition

Diversifying income streams

Reducing course offer

Reducing non-core activities

Reducing student support services

Campus closure

Other (please specify)

57. Over the past year, how has your overall student fee income changed? \*

Increased

Decreased

Stayed roughly the same

58. Over the past year, how have your financial reserves changed? \*

\*

- Increased
- Decreased
- Stayed roughly the same

59. Has your institution taken on additional debt in the last financial year? \*

- Yes
- No
- Unsure/Prefer not to say

60. Collaboration has been recognised as a key strategy for reducing costs across institutions. Which types of collaboration would be most beneficial for your institution?  
*(Please select all that apply) \**

- Shared services (procurement, IT, HR, student services)
- More academic partnerships for joint-teaching or articulation agreements between levels.
- Research partnerships
- Marketing and recruitment collaboration (domestic and international)
- Multi-institutional trusts or corporate structures
- Collaborations to support short course development and credit transfer
- Industry engagement initiatives between several higher education providers
- Regional skills collaboration
- Quality assurance collaboration
- Not interested in collaboration currently
- Other (please specify)

## International Education Q61-Q68

61. Do you currently engage in any international activities? (e.g. international students, international partnerships, study abroad programmes, transnational education or similar)? \*

- Yes
- No
- Unsure

62. Please rank your international activity from largest to smallest by clicking on and dragging each option into place.

- International student recruitment 
- Study Abroad/student mobility 
- Short courses for international students 
- Short courses for global industry partners 
- Transnational education (Campus or blended overseas model) 
- Delivery online to a global student body 
- Consultancy for global companies, NGOs or governments 

63. What are the main drivers for your international activity? (Please select all that apply) \*

- Diversifying student income
- Generating commercial income
- Diversifying student body and curriculum
- Building global collaborative research activity
- Supporting new courses with additional student numbers
- Providing student mobility opportunities
- Supporting global industry objectives
- Educating for a global community or group (for example within a specialist subject area such as theology)

Other (please specify)

64. How many international students do you recruit each year under your current Confirmation of Acceptance of study (CAS) allocation? \*

- None - we do not recruit students for study visas
- Fewer than 50
- 51-100
- 101-200
- 201-500
- More than 500

65. Approximately how many CAS did you use in your most recent allocation year?

- Less than 25% of our allocation
- 25-50% of our allocation
- 51-75% of our allocation
- 76-100% of our allocation
- We applied for more CAS after our original allocation.
- None
- Not applicable

66. The Government's recent Immigration White Paper set out plans to increase the thresholds in the Basic Compliance Assessment by 5%, for example – a sponsor must maintain a course enrolment rate of at least 95% and a course completion rate of 90% in order to pass the compliance threshold.

Are you concerned about the impact of the BCA changes on your ability to recruit international students? (select the response which best describes your position). \*

- Very concerned
- Somewhat concerned
- We are not worried about the BCA changes

Unsure

67. What actions can government take to ensure the changes to BCA are implemented fairly. Please select any of the below statements that you agree with: \*

- Government should raise the rate for discretionary assessments of BCA to 100 CAS to prevent smaller providers from being unfairly disadvantaged by the changes.
- Government should create a different assessment model for providers with less than 100 CAS, with clear requirements that reflect the small volume of students.
- Government should provide greater support and intelligence sharing for providers to manage risks within different student markets.
- Other (please specify)

68. The government is exploring a levy on international student tuition fees. What impact would such a levy have on your provider? (select all that apply) \*

- The levy would significantly impact our financial sustainability and ability to deliver courses to domestic students.
- The levy would discourage us from recruiting more international students.
- The levy would reduce funding for building other export capability in international education.
- We are worried about the administrative burden of paying any levy.
- We are concerned that the imposition of a levy would force us to raise international student fees making us less attractive to prospective students.
- We would welcome a levy on international student tuition fees to redistribute the financial benefits international students from the largest recruiters to elsewhere in the tertiary system.
- Other (please specify)

## Strategic Objectives Q69-Q73

69. Which of the following strategic goals are part of your long or short term objectives as a provider? Please indicate the intended timeframe for each item. *(Please tick all that apply in the relevant columns).* \*

Find a new university partner (any academic partnership) as the teaching or awarding partner

Short Term (next 12 months)

Longer Term strategy

Not Applicable

Successfully apply for a student study sponsor licence

Short Term (next 12 months)

Longer Term strategy

Not Applicable

Open a new campus in the UK

Short Term (next 12 months)

Longer Term strategy

Not Applicable

Open a new campus outside the UK

Short Term (next 12 months)

Longer Term strategy

Not Applicable

Create new international partnerships

Short Term (next 12 months)

Longer Term strategy

Not Applicable

Start new online course delivery

Short Term (next 12 months)

Longer Term strategy

Not Applicable

Develop research capability (industry or academic-led)

Short Term (next 12 months)

Longer Term strategy

Not Applicable

**"Express interest" for LLE modular funding**

Short Term (next 12 months)

Longer Term strategy

Not Applicable

**Expand short course provision outside of LLE**

Short Term (next 12 months)

Longer Term strategy

Not Applicable

**Offer new degree apprenticeships**

Short Term (next 12 months)

Longer Term strategy

Not Applicable

**Offer new apprenticeships below degree level**

Short Term (next 12 months)

Longer Term strategy

Not Applicable

**Develop regional skills partnerships**

Short Term (next 12 months)

Longer Term strategy

Not Applicable

**70. What support could be offered by IHE or others to help you succeed in addressing your priorities? \***

Training and developing staff


Guidance or information specific to independent providers

Consultancy and advice


Policy or regulatory change

Product or service from an IHE partner or supporter

71. Please provide some further detail on your priorities and any additional support you may need to address them.

0/32,000 characters 

72. Is there anything else you would like to share with IHE?

0/32,000 characters 

73. Would you be willing to participate in follow-up research or provide case studies? \*

- Yes, please contact me
- No
- Maybe - please provide more information first

Thank you for completing the IHE 2025 Annual Survey. Your contribution will help us build a detailed, up-to-date picture of how things have changed for independent providers in the new regulatory environment — your priorities, concerns, and plans for the future. A particular thank you to those who have agreed to participate in follow-up research or provide case studies. Remember if you no longer wish your response to be included please let us know on [info@ihe.ac.uk](mailto:info@ihe.ac.uk) as soon as possible and before the closing date.

To learn more about IHE and to stay updated on our latest initiatives, please visit [ihe.ac.uk](https://ihe.ac.uk).