

## Annex B: Guidance on the NSS 2023 for higher education providers, and for further education institutions in Wales returning student data to HESA

1. The National Student Survey (NSS) will be carried out in 2023 across higher education providers in England, Wales, Northern Ireland and Scotland by the Office for Students (OfS), working on behalf of the UK funding and regulatory bodies. Ipsos will manage the survey process and Texuna Technologies will provide the data dissemination portal services. The 2023 NSS will follow a similar timetable to the 2022 survey.
2. This annex provides guidance specifically for UK higher education providers and for further education institutions in Wales that return student data to the Higher Education Statistics Agency (HESA).<sup>1</sup>
3. The responsibilities of providers in the successful management of the NSS are as follows:
  - a. Timely submission of the HESA Student record and HESA Student Alternative record. The final submission date is in early November 2022 for the student record and for the student alternative.
  - b. Ensuring good data quality by checking the NSS report (the target list) generated by HESA. Requests for any necessary changes that cannot be resolved by correcting the student data may be directed to Ipsos, for approval by the OfS or the relevant funding body, within the period from mid-December 2022 to 1 March 2023.
  - c. Timely issuing of NSS pre-notification email to eligible students. Further details can be found in the NSS 2023 set-up guidance, sent to provider contacts by Ipsos. The guidance document is also available on the NSS extranet.<sup>2</sup>
  - d. Timely submission of student contact details (email addresses and telephone numbers) when requested by Ipsos (by **28 November 2022**).
  - e. Engagement with all guidance and requests issued by the OfS, UK funding and regulatory bodies, HESA, Ipsos and Texuna Technologies, and attending training and events run by them as necessary.

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<sup>1</sup> Jisc and HESA have announced a merger, taking effect from the beginning of October 2022. Post-merger and for the foreseeable future, HESA's brand will continue and its website will remain as a data-hosting platform. For more information see [Jisc and HESA confirm merger | HESA](#).

<sup>2</sup> See <https://portal.ipsos.com/sites/NSS>.

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- f. Submitting survey preferences to Ipsos. This includes the timing of the survey and the choice of optional bank questions. Optional bank choices should be made in conjunction with the relevant students' union.
  - g. Providers in England are not required to promote the survey to students but can do so if they wish; this follows the same process as in NSS 2022. Providers in Wales, Scotland and Northern Ireland are required to promote the survey. Providers that promote the survey to their students must ensure that all activities meet the guidelines on marketing and promoting the survey and on avoiding inappropriate influence, as provided by Ipsos in the good practice guide.
4. For NSS 2023, in addition to targeted follow-up, all providers that are at risk of not meeting the publication threshold will be automatically put into the booster phase to send additional reminders to their non-responding students. This is additional promotional activity to encourage students to complete the survey. Providers are not required to take any action in relation to the booster phase.
  5. Providers may access their detailed responses and results of the survey via the NSS data dissemination portal provided by Texuna Technologies, from the OfS website and from the Discover Uni website (for students).
  6. Providers can access their target lists for the 2023 NSS via the HESA data collection system. They should provide the requested contact details for students on these lists to Ipsos by **28 November 2022**. Further details can be found in the NSS 2023 set-up guide for providers, sent to contacts by Ipsos. The guidance document is also available on the NSS extranet.<sup>3</sup>
  7. Additions to or removals from the target list are admitted only under specific circumstances, details of which are provided in this guidance. Any such requests for additions or removals must be submitted to Ipsos and agreed by the OfS or relevant funding body prior to their inclusion in, or removal from, the final target list. If approved, the OfS will inform the provider and make the amendment to the target list.
  8. Eligible students may opt out of the survey at any stage during the fieldwork process.
  9. Providers may choose up to six banks of optional questions and may include up to two additional questions specific to the provider. Providers are asked to agree with students' unions their choice of optional banks of questions for inclusion. Providers should submit their choice of optional banks and additional questions to Ipsos.

### Scope and coverage of the survey

10. The following providers are covered by the NSS 2023:
  - a. In England, all providers registered and regulated by the OfS will be expected to participate in the NSS as an ongoing condition of registration.

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<sup>3</sup> See <https://portal.ipsos.com/sites/NSS>.

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- b. In Northern Ireland, NSS participation is a condition of funding as set out in the financial memoranda between universities and the Department for the Economy (Northern Ireland). Further education colleges in Northern Ireland take part in the NSS to meet the requirements of the Revised Operating Model for Quality Assurance.
  - c. In Scotland, participation is a condition of the Scottish Funding Council's funding for higher education providers.
  - d. In Wales, all regulated providers are required to participate, to meet the requirements of the Quality Assessment Framework for Wales.
11. All full-time and part-time undergraduate students registered at participating providers are eligible to undertake the NSS during their final year of study (or, for flexible programmes where the final year cannot be predicted, after they are expected to have undertaken more than one full-time equivalent and not before their third year of study), with the following exceptions:
- a. students on programmes that do not lead to undergraduate qualifications or credits
  - b. students on a course lasting one year or one full-time equivalent, or less
  - c. any students who were surveyed in the 2022 NSS (whether or not they responded) and who remain at the same provider
  - d. any students who we expect, by the end of the academic year 2022-23, to have completed one full-time equivalent year or less since they were last surveyed.
12. Students are included in the 2023 survey population if they are expected to complete their course between 1 February 2023 and 31 January 2024 inclusive.
13. It is possible to add students to or remove them from the NSS target list in exceptional circumstances, for example if the length of a student's course has decreased after a provider has submitted its HESA Student or Student Alternative return. The full criteria are in the NSS 2023 set-up guidance provided by Ipsos.
14. Providers will be able to make requests to add students or remove them from the NSS population once the target list has been finalised by the OfS. The additions and removals process will start mid-December 2022 and run until 1 March 2023. Ipsos will contact all providers when the system is open and ready for requests, by 19 December at the latest.
15. Requests should be submitted as soon as possible to ensure they can be processed prior to, or early in, the survey period. All requests must be made through the NSS extranet and should be made in a single file, including the required level of detail.<sup>4</sup> The OfS or relevant funding body will review all requests for additions and removals and may

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<sup>4</sup> See <https://portal.ipsos.com/sites/NSS>.

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request further details from providers where necessary. Submitting requests as early as possible and responding to queries in a timely manner will help expedite the process. It may be necessary for the OfS to prioritise approvals by survey start week, but we will endeavour to action all requests prior to the survey start date.

16. Except for students on enhanced first degrees, postgraduates are not included in the NSS.

### Reasons for excluding individuals from the survey

17. We enable providers to exclude specific groups of students from being contacted by Ipsos. These groups are:

- a. Students who are deceased.
- b. Students with serious health difficulties (including mental health difficulties), such that seeking a response may be distressing for them.
- c. Students who, having been informed that their contact details will be passed on to the survey agency (Ipsos) for the purposes of the NSS, state that they do not wish to be contacted (students will also be able to opt out during the survey process).

18. Students in groups b and c will still be able to complete the survey if they wish, through the survey website.<sup>5</sup>

19. These are the only grounds on which students may be excluded from the target population. Providers should code these students on their sample submission as category 'C', and providers should not provide contact details for these students. More information on the process is in the NSS 2023 set-up guidance provided by Ipsos.

20. If the provider feels that the target population does not accurately reflect the students currently in the final year of eligible courses, then it should engage with the additions and removals process as outlined in paragraphs 13 to 15. Reasons for differences will usually be changes in the student's circumstances, such as taking a year out or retaking a year.

21. In exceptional circumstances, the reason for a change in the target population may be an error in the student data returned to the HESA Student or Student Alternative records. In this case:

- a. English providers may wish to review the data for these students and consider if they would like to submit a data error summary to OfS for consideration.<sup>6</sup> If on reviewing this summary we believe the errors are widespread and material, we

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<sup>5</sup> See <https://www.thestudentsurvey.com/>.

<sup>6</sup> See <https://www.officeforstudents.org.uk/data-and-analysis/amendments-to-data/data-amendments-process/>

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may require the provider to submit a revised Student or Student Alternative record to HESA.

- b. For providers in Northern Ireland, Scotland and Wales, the details of any potential data errors will be shared with the respective funding bodies for their consideration on any further action.

22. It should be noted that HESA will apply a charge to meet the costs of processing such a change.
23. To enable us to monitor exclusions and verify their consistent application, providers should retain evidence to support them. Where a student asks that their details are not passed on, we will expect providers to retain evidence of this request. If the number of such requests at any provider is so high as to affect our ability to conduct the survey successfully, we will discuss this with the provider.
24. Although some students may withdraw in their final year, they will have had significant interaction with the provider, so their opinions are valuable and should be included.

### Process for supplying student contact data

25. Following submission of the Student or Student Alternative records to HESA, a target list of students to be included in the NSS will automatically be generated. The provider should then supply contact details (email addresses and phone numbers), according to the standard template that will be supplied by Ipsos, for all eligible students on the list.
26. Students should be informed by the provider that their contact details may be passed on. Providers can do this by sending a NSS pre-notification email to all students eligible to take part an NSS informing them that they will be contacted by Ipsos. Guidance and an email template are provided in the NSS 2023 set-up guidance issued to providers by Ipsos. There is also text added to the HESA student data collection<sup>7</sup> notice to explain this.
27. Providers can define their own structure for receiving their NSS data, through one of two optional fields on the sample file to indicate the internal 'department code' for each student. These codes, where provided, will be used solely for providing feedback to the provider.
28. Providers should submit the requested contact details for students on these lists to Ipsos by **28 November 2022**. Ipsos will provide guidance to its contacts on how to supply these lists as part of the NSS guidance document. The NSS achieves a high response rate, and to ensure this continues it is important that providers submit complete and accurate contact details to Ipsos by this date.

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<sup>7</sup> See <https://www.hesa.ac.uk/about/regulation/data-protection/notices#student>.

## Administration of the survey

29. The 2023 survey will be conducted from 11 January until 30 April 2023 during the spring term so that the results can be published in summer 2023. To avoid concerns regarding impact on internal surveys, Ipsos will continue to:

- brand the NSS independently, which clearly distinguishes its purpose
- manage the survey's distribution centrally, so that providers are not involved in contacting students to complete the NSS.

30. Providers will be invited to select one of five weeks when Ipsos can launch the survey to their students. This is to ensure that the survey can start at a time that fits with term timetables and does not clash with exams. Providers may select a week between 9 January and 6 February 2023 for the survey to start. There will be no communication with students by Ipsos outside the times agreed with each provider. However, students will be able to access the survey through the survey website from 11 January 2023 onwards.<sup>8</sup>

31. It is essential that all providers start their surveys during the five-week 'starting window' to ensure that results can be published in time for prospective students to make informed choices. We will, however, consider individual requests for a start date outside the five-week window where the activities of students make it impractical to conduct the survey during that time. Any provider that wishes to make a case for a different survey start date should contact Ipsos by **28 November 2022**.

32. Ipsos will conduct the survey at each provider using a set sequence of email and telephone surveying. This will take up to eight weeks at each provider, although some targeted follow-up may be needed during and beyond this time to increase response rates. Ipsos will deploy the survey modes tactically, to personalise the survey to students and providers and help increase online responses and reduce survey costs.

## Promoting the NSS

33. To reduce the burden on providers, the OfS has agreed that those in England are not required to promote the 2023 survey to their students, but they can do so if they wish to.

34. Providers in Wales, Scotland and Northern Ireland are required to promote the survey, as agreed by the funding bodies in these nations.

35. Providers that promote the survey are expected to review any internal campaigns to ensure that they meet with the guidance on marketing and promoting of the NSS and avoiding inappropriate influence (please see the 2023 good practice guide).<sup>9</sup>

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<sup>8</sup> See <https://www.thestudentsurvey.com/>.

<sup>9</sup> Available at <https://portal.ipsos.com/sites/NSS>.

36. The good practice guidance for NSS 2023 will be available from the Ipsos NSS extranet and includes comprehensive guidance on the promotion of the survey. It is important that providers adhere to the guidance on avoiding inappropriate influence and raise any queries with Ipsos. The UK funding and regulatory bodies treat seriously any breaches of this guidance and may investigate and act where there is evidence of a breach. We undertake an annual review to ensure that the process we adopt to respond to allegations is fit for purpose and make any improvements to the process and guidance for providers and students before fieldwork takes place. This allegations procedure guidance is intended to be read in conjunction with the good practice guidance issued by Ipsos.<sup>10</sup> We would urge providers to ensure that all staff who are responsible for the running of the survey are familiar with Ipsos's guidance and seek advice where needed on their approach to avoiding inappropriate influence.
37. A student guide on inappropriate influence is available to help to raise awareness among students of the value of their honest views, what to expect from NSS promotion, what is and is not allowed, and where they should go for help and support if they are concerned about being influenced.<sup>11</sup> Providers are asked to inform students about this guide as part of their pre-launch survey plans. More details on this are provided in the NSS 2023 set-up guide issued by Ipsos.
38. The OfS and the UK funding regulatory bodies have agreed to keep the same NSS promotional campaign from 2022 for NSS 2023. Ipsos will produce promotional materials with some new social media materials for providers and students' unions to distribute locally. Providers will be able access the full suite of marketing materials from the NSS extranet. If a provider or students' union wishes to use the NSS branding to develop its own marketing material, it may do so and should discuss this with Ipsos, which will advise on good practice and offer guidelines to ensure a reasonable degree of consistency across the sector. When it contacts providers, Ipsos will discuss who in the provider is best placed to coordinate promotional activity. Further information about marketing materials and promoting the survey will be provided in the NSS 2023 good practice guide from Ipsos on 28 October 2022.<sup>12</sup>
39. Ipsos will manage incentive schemes in which providers may take part. These enable providers to offer incentives to students to complete the NSS. For example, some providers have offered printer credits for students who complete the survey online.
40. Students on flexible programmes will receive tailored communications that more accurately reflect their participation in higher education.

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<sup>10</sup> Available at [www.officeforstudents.org.uk/advice-and-guidance/student-information-and-data/national-student-survey-nss/inappropriate-influence/](http://www.officeforstudents.org.uk/advice-and-guidance/student-information-and-data/national-student-survey-nss/inappropriate-influence/).

<sup>11</sup> Available at <https://www.officeforstudents.org.uk/nss-influence/>.

<sup>12</sup> Available at <https://portal.ipsos.com/sites/NSS>.

## Questionnaire distribution

41. There are two main methods of data collection: online and telephone. Ipsos operates a live open-access website, where students can log in and complete the survey, in addition to the option to respond by following the link in a personalised email. The aim of the site is to verify the identity of students at the point of logging in; once students have completed the survey and their response is validated, they will be automatically removed from the target list and not contacted again. To enable this, and to enable efficient working of the survey more generally, providers should adhere to the deadline for supplying student contact details.
42. Although there are two methods of data collection, we are committed to reducing the amount of telephone contact. However, telephoning remains an essential element of the survey and will continue, so all providers are expected to provide each student's mobile phone number and any other alternative contact number that is held.
43. To monitor responses and to process data for analysis and reporting, we link all responses to students' numbers in the HESA Student or Student Alternative records or known student identifiers. Telephone interviewers will have automatic access to identifiers. Once students have completed the survey, they will be removed from the target list and not contacted again.
44. Throughout the process, Ipsos will send reminders to students who have not responded.
45. Response rates, by provider and by subject area, will be monitored continuously during the process. During the telephone stage, response rates will be reviewed, and some areas may be identified for additional, targeted follow-up activity, to bring responses up to a sufficient level to report results. This additional activity will involve reminders by email and text message.
46. For NSS 2023, in addition to targeted follow-up, all providers that are at risk of not meeting the publication threshold will be automatically put into the booster phase to send additional reminders to their non-responding students during survey fieldwork. This will be started automatically if a provider's response rate is below 43 per cent by mid-March and will continue for some providers until mid-April. An additional text reminder will be included in the schedule of contact to non-responding students during the booster phase.
47. At any stage during the survey process, students may opt out of the survey and will not be contacted again. To do this, students will need to verify their identity by providing some data, such as their date of birth.
48. Provider response rates will be shared by Ipsos during the fieldwork to help providers monitor their survey progress. Providers should not share this data more widely, and guidance on this is provided in the NSS 2023 good practice guide sent to provider contacts by Ipsos. National response rates data will not be made available to providers.
49. The UK funding and regulatory bodies reserve the right to agree changes to the survey period with individual providers that are at risk of not meeting provider-level or subject-

level publication thresholds. The OfS will inform providers of any approaches and actions that may be necessary. The completeness and accuracy of students' contact data, as supplied by providers, will be a significant factor in achieving a publishable level of responses.

### Publication of 2023 NSS results

50. A major purpose of the NSS is to provide information to help potential students and their advisers make choices about higher education. It also has a key role in improving the student experience, by helping providers to identify areas for action or development.
51. The current publication threshold for NSS results is a 50 per cent response rate, with at least 10 students responding. Results that meet the publication threshold and criteria will be published on the Discover Uni website.<sup>13</sup> Data will also be published on the OfS website.
52. Data will also be available to providers on the NSS data dissemination portal delivered by Texuna Technologies. The results portal will allow providers to access elements of their data, including optional bank questions, students' open text comments and data below certain publication thresholds.
53. The OfS and UK funding and regulatory bodies may publish their own analysis of the data, including open text comments and optional banks. For data that is not available publicly through the OfS website, this will be at aggregate level and will not allow providers, courses or individuals to be identified.

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<sup>13</sup> See <https://discoveruni.gov.uk/>.