

Signal: Culture Intelligence Report

The University of Kent

May 2026

Executive Summary

The University of Kent is under serious structural pressure, and publicly available data tell a consistent story.

This report draws on over 80 million data points held across 17 public datasets, covering student demand, financial performance, staff structures, student satisfaction, graduate outcomes, and regulatory compliance. The analysis reads them together, against a single institution, in a single framework.

The Signal Score for Kent is **0.7 out of 10**, placing the university in the bottom decile of 97 English higher education institutions. This is not driven by weakness in one area. All five dimensions of organisational culture score below 2.0, a pattern we classify as Broad Cultural Strain. It is typically found in institutions where multiple pressures have accumulated over a sustained period without an effective response.

The most important finding in this report is the gap between what Kent says it wants to be and what the data shows it is. The university's own strategy document names "Embrace Change" as a core institutional value. The data tells a different story: six consecutive years of falling enrolment, four years of underlying operating deficits, and an NSS Student Voice score that sits 7.7 points below benchmark. These are not the characteristics of an institution that has embraced change. They are the characteristics of an institution that is now being forced into it.

The planned merger with the University of Greenwich, forming the London and South East Universities Group (LASEUG) from August 2026, is the strategic response to these pressures. Whether Kent's organisational culture can support a merger of this scale is the central question this report raises.

There are genuine strengths. Financial reserves remain adequate (BFSI 9.1 out of 10, Sustainable band). Student retention is above benchmark. The launch of the Kent and Medway Medical School shows that the institution retains some capacity for strategic initiative. But these strengths exist alongside a demand picture that has deteriorated sharply: total applicants have fallen 41.5% since 2016, with international applicants down 56.9% over the same period.

This report is intended for the Vice-Chancellor, the Chair of Governors, and the senior leadership team. It provides a structured assessment of organisational culture and institutional health to inform governance oversight and strategic decision-making during the pre-merger period.

At a Glance

Strengths

Financial reserves remain intact. The headline BFSI score of 9.1 places Kent in the Sustainable band. Unrestricted reserves stand at 94.4% of income. While the underlying operating position is weaker than the headline suggests, the balance sheet provides a buffer for the merger integration period. This matters because merger integration costs money, and Kent enters the process with reserves that can absorb some of that cost.

Student retention is above benchmark. Continuation sits at 92.4% against a 91.3% benchmark, and completion at 92.3% against a 90.8% benchmark. Students who arrive at Kent tend to stay and finish their degrees. This matters because it tells us that the student experience, while not excellent, is not broken at the point of delivery. The problems are upstream (attracting students) and downstream (ensuring their voices are heard).

The medical school demonstrates strategic capability. The Kent and Medway Medical School, launched in September 2020, is evidence that Kent can execute a complex, multi-partner initiative. This matters because it suggests that the institution's low Adaptability score reflects a sustained failure to respond to market pressures rather than a fundamental inability to act.

Risks

Demand has collapsed across both markets. The total number of applicants has fallen from 29,110 in 2016 to 17,045 in 2025. This is a 41.5% decline over nine years. International applicants have fallen even further, from 7,120 to 3,070, a decline of 56.9%. UK applicants are down 36.4% over the same period. This is not a wobble or a cycle. It is a structural contraction in demand for Kent's offerings. This matters because a merged institution inheriting this trajectory will need to reverse it or manage the financial consequences of continued decline.

The workforce has been through sustained restructuring. In 2023/24, 146 individuals received compensation for loss of office. Staff costs have been reduced from 60.9% to 54.8% of income over five years through a combination of restructuring and natural attrition. This matters because the merger will require staff to absorb further change, and the cumulative toll of recent years has not been measured or acknowledged in any public document.

Students do not feel heard. The NSS Student Voice score of 69.0% is 7.7 points below benchmark. Only 54% of students believe their feedback is acted on. In an institution preparing for the most significant structural change in its history, the inability to listen and respond is a strategic weakness, not just a satisfaction metric. This matters because merger communications, consultation, and transition planning all depend on an institutional culture that can process feedback and act on it.

The Signal Score

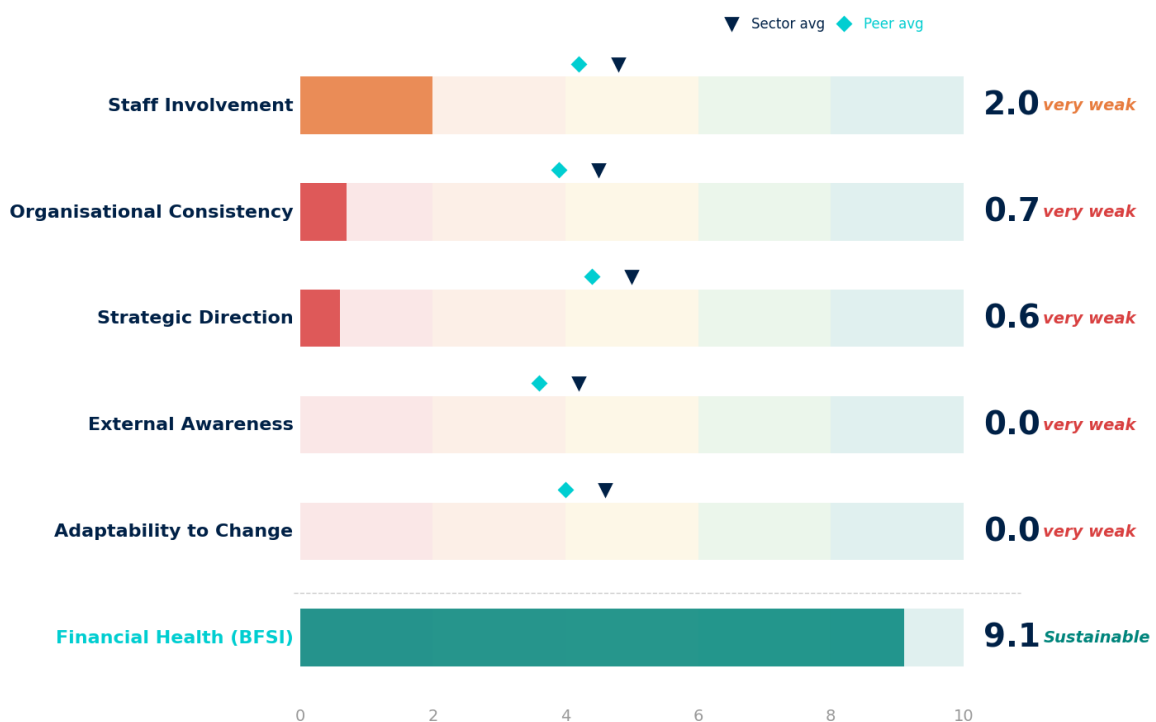
What it measures

The Signal Score is a composite index of organisational culture and health, calculated from 59 publicly available data points. These are drawn from six sources: HESA staff and finance data, UCAS application data, the National Student Survey, OfS student outcomes data, and institutional publications. The data points are mapped to five dimensions of organisational culture: Staff Involvement, Organisational Consistency, Strategic Direction, External Awareness, and Adaptability to Change.

The Signal Score is not an opinion. It is a structured reading of the public data on how an institution is functioning. A low score does not mean an institution is failing. It means the data show patterns typically associated with organisational strain.

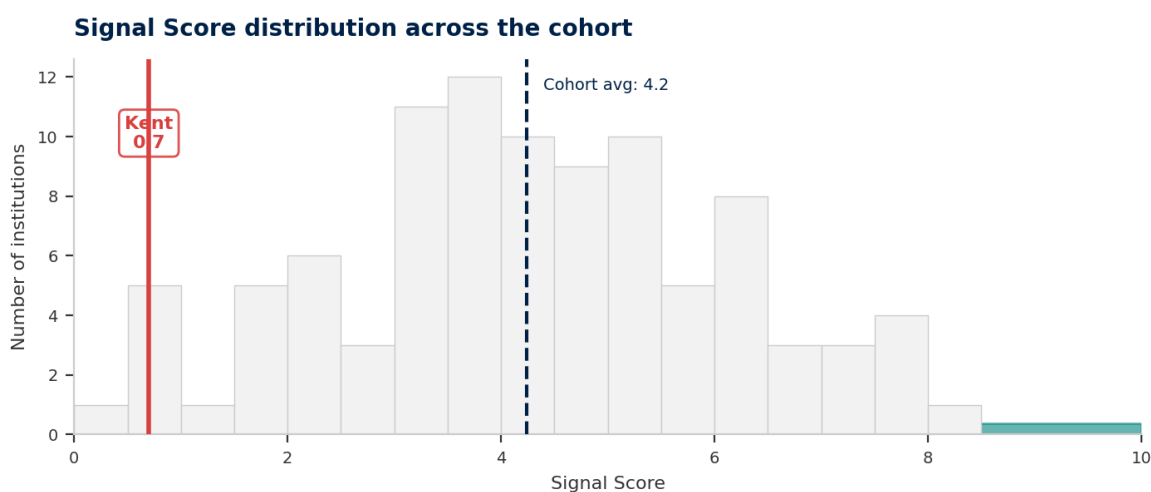
How Kent scores

Kent's composite Signal Score is **0.7 out of 10**, classified as **very weak**.



The pattern here is Broad Cultural Strain. No dimension exceeds 2.0. This is not a case where one area of weakness is pulling the score down. Every dimension is contributing to the reading.

Where Kent sits in the cohort

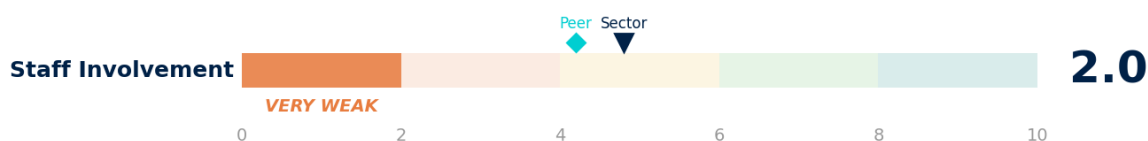


Kent sits in the bottom decile of the Signal cohort of 97 English higher education institutions. The cohort average is 4.2. Only a small number of institutions score below 1.0, and they share common characteristics: sustained enrolment decline, financial pressure, and evidence of significant restructuring activity.

This is important context for the board. A Signal Score of 0.7 does not place Kent among institutions that are slightly below average. It places Kent among institutions where the data is showing serious and sustained organisational strain.

Signal Dimensions

1. Staff Involvement (2.0/10)



The signal

Staff Involvement is Kent’s strongest dimension, though a score of 2.0 still places it well below the sector average of 4.8. This dimension captures whether the institution’s workforce is stable, appropriately sized, and engaged. At Kent, the signal is that the workforce has been through a prolonged period of contraction that has brought costs closer to the sector average, but at a human cost that the data can detect but not fully measure.

The evidence

Three pieces of data drive this reading.

First, severance activity. In 2023/24, Kent reported 146 individuals receiving compensation for loss of office, at a total cost of £4.33 million. To put that in context, this is not a single restructuring event. It sits within a multi-year programme of cost reduction that has accompanied the decline in enrolment.

Second, staff costs. Kent's staff costs (excluding pension adjustments) stood at 54.8% of total income in 2023/24. This is above the sector average of 52.0%, but it has improved significantly from 60.9% in 2019/20. The reduction has been achieved through headcount reduction alongside income management. Total staff FTE stood at 2,901 in 2023/24, including an average of 1,785 non-academic staff.

Third, the trajectory. The direction of travel on staff costs is positive in financial terms. But reducing staff costs by six percentage points over five years, while simultaneously managing a 16.6% decline in student numbers, means the remaining workforce has been absorbing increasing pressure. The university now employs 105 professors across 10 academic schools.

What this means

This matters because the merger with Greenwich will require exactly the kind of workforce capacity and goodwill that sustained restructuring erodes. A workforce that has been through 146 severance payments in a single year, operating under a strategy that has now expired, is being asked to absorb the largest structural change in the institution's sixty-year history.

The board should not assume that because staff costs are now closer to the sector average, the workforce is in a healthy position. The financial ratio has improved. The question is whether the people behind that ratio have the capacity and willingness to support a merger.

This dimension connects directly to two others. A depleted workforce results in a weaker student experience, as reflected in the Organisational Consistency score (0.7). And a workforce under sustained pressure is less able to drive the strategic changes needed to reverse the decline in demand, as reflected in the Adaptability score (0.0). The staff story is not self-contained. It runs through every other signal in this report.

The board should be asking: what is the cumulative effect of recent restructuring on staff capacity and morale, and what specific evidence do we have that the workforce can absorb the integration programme?

2. Organisational Consistency (0.7/10)



The signal

Organisational Consistency measures whether an institution's internal systems, governance, student experience, and support structures are pulling in the same direction. At Kent, the signal is that they are not. A score of 0.7 places Kent well below the sector average of 4.5 and indicates that the institution's internal alignment is weak across multiple indicators.

The evidence

The clearest evidence comes from the student experience. Kent's NSS results for 2025 show the institution below its benchmark on six of seven themes. The only exception is Learning Resources, where Kent scores 88.0% against an 87.9% benchmark, a difference of 0.2 percentage points.

The weakness is most pronounced in Student Voice. Kent scores 69.0% on this theme, against a benchmark of 76.7%. Within that theme, Q24 asks students whether their feedback has been acted on. At Kent, only 54.0% of students agree, compared to a benchmark of 66.0%. That is a 12.1-percentage-point gap. One in two students cannot see that their feedback makes any difference.

This is not a problem of resources or facilities. Kent scores adequately on Learning Resources. It is a problem of responsiveness. Students are telling the university that they do not feel listened to, and the data suggest the university has not found a way to change that perception.

The OfS B3 outcomes data provides a more positive picture of student outcomes. Continuation sits at 92.4% (benchmark 91.3%, +1.1) and completion at 92.3% (benchmark 90.8%, +1.5). Students who start at Kent tend to finish. But progression, which measures whether graduates move into graduate-level employment or further study, is marginally below benchmark at 69.7% (benchmark 70.6%, -0.9). This suggests that while Kent keeps its students, it is not yet converting that retention into distinctive employment outcomes.

What this means

The gap between retention (a strength) and student voice (a weakness) tells a specific story. Kent can deliver a degree, but it struggles to make students feel that their experience is being actively shaped by their feedback. In a steady-state institution, this would be a quality improvement priority. In an institution about to merge, it becomes a strategic risk. Merger transitions generate anxiety and uncertainty among students. An institution that already struggles to communicate and respond will find the merger period significantly harder to manage.

Kent's own strategy document, "Kent 2025", listed "Education for Individual Needs" as a strategic priority and aspired to deliver "one of the best education and student experiences amongst UK universities." The NSS data suggest this aspiration was not realised.

This dimension is connected to the demand picture. Prospective students and their families increasingly read NSS results before making choices. An institution that scores below the benchmark on six of seven themes and whose Student Voice score is 7.7 points below expectations is sending a signal to the market. The 41.5% decline in applications (see Strategic Direction) is not caused by any single factor, but a persistently below-benchmark student experience is part of the story. The experience signal feeds the demand signal, which feeds the financial signal. They are not separate problems.

The board should be asking: why does Kent score so poorly on student voice, and what mechanisms are in place to ensure students feel heard during the merger transition?

3. Strategic Direction (0.6/10)

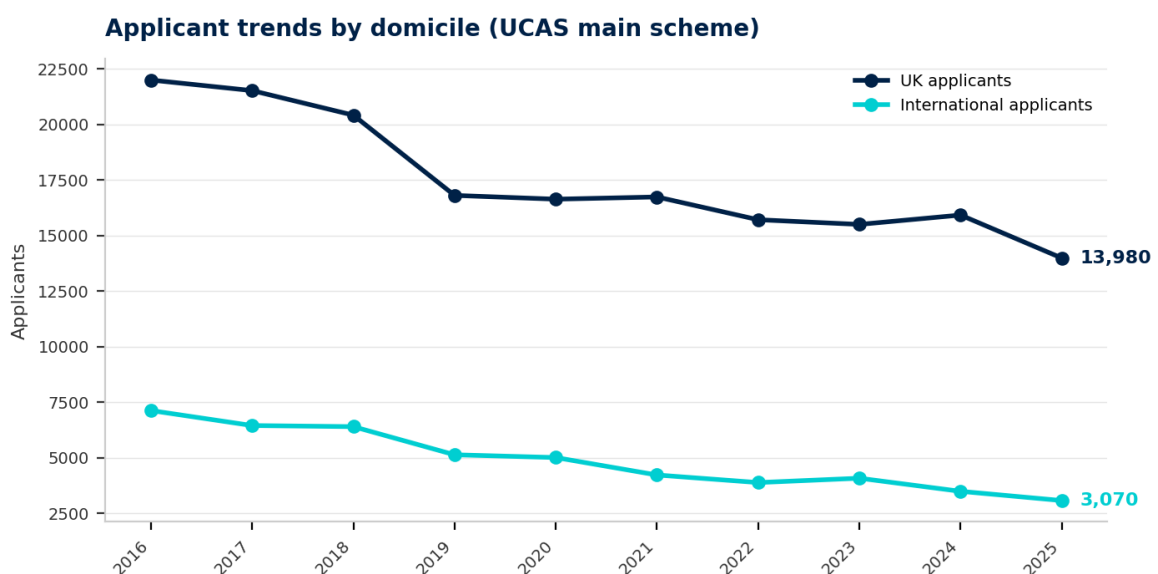


The signal

Strategic Direction captures whether the institution has a clear, credible forward trajectory. The indicators include demand trends, financial trajectory, and evidence of strategic investment. At Kent, the signal is that the institution has been losing ground for the better part of a decade and that its stated strategy has not reversed the decline.

The evidence

The demand data tells the most important part of this story.



Total applicants to Kent have fallen from 29,110 in the 2016 UCAS cycle to 17,045 in 2025. That is a 41.5% decline over nine years. UK applicants have fallen from 21,990 to 13,980 (down 36.4%). International applicants have fallen from 7,120 to 3,070 (down 56.9%).

The international decline is particularly significant. Kent has lost more than half of its international applicant pool in under a decade. This suggests a combination of factors: increased competition from London institutions, the impact of changes in immigration policy, and potentially a weakening of Kent's international brand. Whatever the cause, the effect is clear. A market that once contributed 7,120 applicants now contributes 3,070.

The most recent cycle (2025) saw the sharpest single-year decline in UK applicants: down 12.2% from 15,915 to 13,980. This is not the gentle drift of earlier years. It is an acceleration.

Kent's current strategy, "Kent 2025", has now reached its end date. It was built around five strategic priorities: a "Dual Intensity" university model, education for individual needs, partnerships, digital transformation, and equality, diversity and inclusion. These are recognisable strategic themes. The question is not whether they were the right priorities but whether they were executed with sufficient urgency. The application data suggests they were not.

What this means

The merger with Greenwich is, in effect, the admission that Kent's standalone strategy has not worked. The institution has lost 41.5% of its applicants over nine years while operating under a strategy that named "Embrace Change" as a core value. The gap between aspiration and outcome is the central finding of this dimension.

For governors, the forward-looking question is whether the merged institution's strategy will be different in kind, not just in scale. If LASEUG inherits Kent's declining trajectory without a credible plan to reverse it, the merger will have consolidated the problem rather than solved it.

The decline in demand is the thread that runs through this entire report. It is the reason staff costs had to be cut (Staff Involvement), the reason the workforce has been restructured, and the reason the operating deficit has persisted (Financial Health). It is both a cause and a consequence of the weaknesses in other dimensions: a below-benchmark student experience (Organisational Consistency) makes recruitment harder, and harder recruitment makes it harder to invest in the student experience. This is a reinforcing cycle, and the data suggests Kent has been inside it for several years.

The board should be asking: What is the demand forecast for the merged institution, and has the merger business case been stress-tested against a scenario in which Kent's application decline continues or accelerates?

4. External Awareness (0.0/10)



The signal

External Awareness measures whether the institution is reading and responding to its competitive environment. This includes graduate outcomes, market positioning, and the relationship between what the institution offers and what the market is choosing. At Kent, the signal is that the institution has not adapted its offer to match shifting demand, and the market has responded accordingly.

The evidence

The graduate progression rate of 69.7% is marginally below the OfS benchmark of 70.6%. This is not a regulatory concern in isolation. But it means Kent is not outperforming on the employability indicators that increasingly drive student choice. In a market where prospective students and their families weigh graduate outcomes heavily, performing at the benchmark is not a competitive advantage. It is a baseline.

The subject portfolio provides further context. Kent's two largest subject areas are Social Sciences (7,535 enrolments in 2024/25, down from 8,550 the previous year) and Business and Management (7,215, down from 8,130). Together, these account for roughly 30% of the institution's total enrolment. Both are declining. Both are highly competitive subjects, where Kent competes directly with London institutions that offer similar programmes and have stronger location appeal for international students.

The acceptance rate in the 2025 cycle was 22.6% (3,845 accepted applicants from 17,045). This conversion rate has been broadly stable over time, which means the decline in acceptances is tracking the decline in applications rather than reflecting a conversion problem. Kent is not losing students at the offer stage. It is failing to attract sufficient interest in the first place.

What this means

This pattern is important because it suggests the problem is upstream of Kent's control in one sense (macro demand shifts, immigration policy, London competition) but within Kent's control in another (programme design, market positioning, international recruitment strategy). The university's published strategy, named "Embracing Partnerships", as a priority but did not publicly articulate a response to the competitive dynamics that were already visible in the application data.

The external awareness gap is visible in one specific way that ties back to the demand data. Kent's two largest subjects, Social Sciences and Business, are exactly the ones in which London institutions hold the strongest competitive advantage, particularly for international students. Kent has lost 56.9% of its international applicants since 2016. It has not publicly repositioned its portfolio in response. The market has moved; the offer has not. This is the same pattern that appears in the NSS data

(Organisational Consistency): an institution that struggles to read feedback and respond to it, whether the feedback comes from students or from the market.

For the merged institution, External Awareness will be critical. Greenwich’s London location gives LASEUG access to a market that Kent has struggled to reach on its own. But location alone does not create a competitive advantage. The merged institution will need a deliberate strategy for programme design, international recruitment, and graduate outcomes that goes beyond combining two existing portfolios.

The board should be asking: what specific changes to programme design, pricing, or market positioning are planned for the merged institution, and how do they address the competitive dynamics that have driven Kent’s decline?

5. Adaptability to Change (0.0/10)

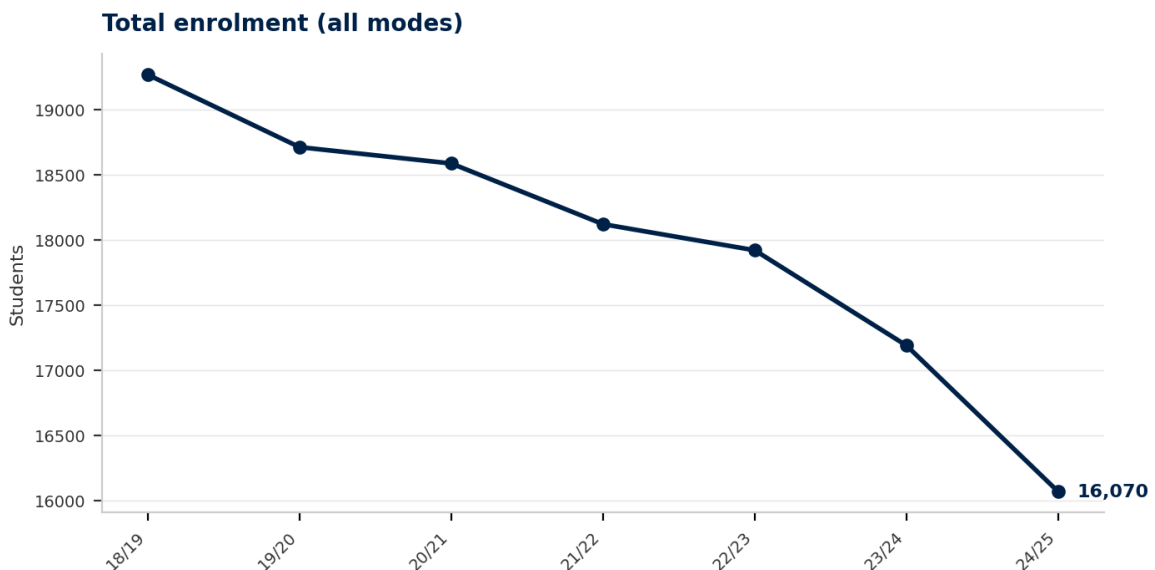


The signal

Adaptability to Change is Kent’s weakest dimension. It reflects the institution’s demonstrated capacity to respond to external pressures and implement change. A score of 0.0 does not mean Kent has done nothing. It means the data show a pattern in which significant external pressures have persisted over multiple years without an effective institutional response.

The evidence

The enrolment trend is the primary indicator.



Enrolment has declined every year since 2018/19, falling from 19,265 to 16,070 in 2024/25. That is a cumulative loss of 3,195 students, equivalent to 16.6%. At a blended fee income of approximately £9,000 per student, this represents roughly £29 million in lost annual income.

The critical observation is not that enrolment has fallen. Many institutions have experienced demand pressure. It is that enrolment has fallen in every single year for six consecutive years. There has been no stabilisation, no recovery year, no evidence that any intervention has changed the trajectory. Each year's decline feeds into the next, reducing income, increasing cost pressure, triggering restructuring, and further weakening the institution's capacity to respond.

Kent's strategy document listed "Embrace Change" as one of five core institutional values and established six academic divisions (since reorganised into ten schools) to promote "agility and resilience." The structural reorganisation happened. The agility and resilience did not follow, at least not in any way that is visible in the demand data.

What this means

The merger with Greenwich is, in one reading, the adaptive response that Kent was unable to generate internally. It is a recognition that the standalone trajectory was unsustainable and that a structural combination with a larger, London-based partner offers a path that an organic strategy could not deliver.

The question for governors is whether the merger itself can succeed in an organisation that has not demonstrated adaptive capacity in its recent history. Mergers require rapid decision-making, cultural flexibility, and the ability to manage uncertainty. The data in this report suggests these are not currently strengths at Kent.

This does not mean the merger is wrong. It may well be the right strategic decision. But it does mean the integration programme needs to be designed with an explicit awareness that Kent's organisational culture is starting from a position of strain rather than strength.

Adaptability is the dimension where all the other signals converge. The decline in demand (Strategic Direction) has not been reversed. The student experience (Organisational Consistency) has not exceeded the benchmark. The competitive repositioning (External Awareness) has not happened. The workforce (Staff Involvement) has been cut but not rebuilt. Each of these is a separate signal. Together, they describe an institution that has been unable to change course over a sustained period. The merger is a change of course. The question is whether it will work in an organisation that has not demonstrated this capacity recently.

The board should be asking: what specific evidence exists that the merged institution will be able to reverse the enrolment trajectory that Kent has been unable to address independently?

How These Signals Connect

The five Signal dimensions are measured independently. At Kent, they tell a single connected story.

It starts with demand. Applications have fallen 41.5% over nine years. That decline has reduced income, forcing cost reductions and leading to sustained staff restructuring: 146 severance payments in 2023/24 alone. A smaller, stretched workforce delivers a student experience that falls below benchmark on six of seven NSS themes. Students who do not feel heard tell the market, through NSS results and word of mouth. The market responds with fewer applications. And so the cycle continues.

Kent's own strategy, named "Embrace Change", is a core value. The data shows an institution caught in a cycle it has not been able to break. The Signal Score of 0.7 is not driven by a single bad year or a single weak area. It is the cumulative reading of an institution, where every signal points in the same direction.

The merger with Greenwich is the intervention that breaks this cycle, or at least has the potential to. Greenwich brings scale, a London location, and a larger student base. But mergers do not automatically resolve the organisational dynamics that created the problem. If the integration is not designed around an honest understanding of Kent's starting position, the cycle risks continuing inside a larger institution.

The sections that follow examine the financial, market, and student experience evidence in more detail. They should be read as extensions of the Signal analysis, not as separate topics. The financial trajectory is a consequence of the decline in demand. The student experience data is both a symptom and a cause of it. The market position is the context in which the merger needs to succeed.

Financial Health

The headline



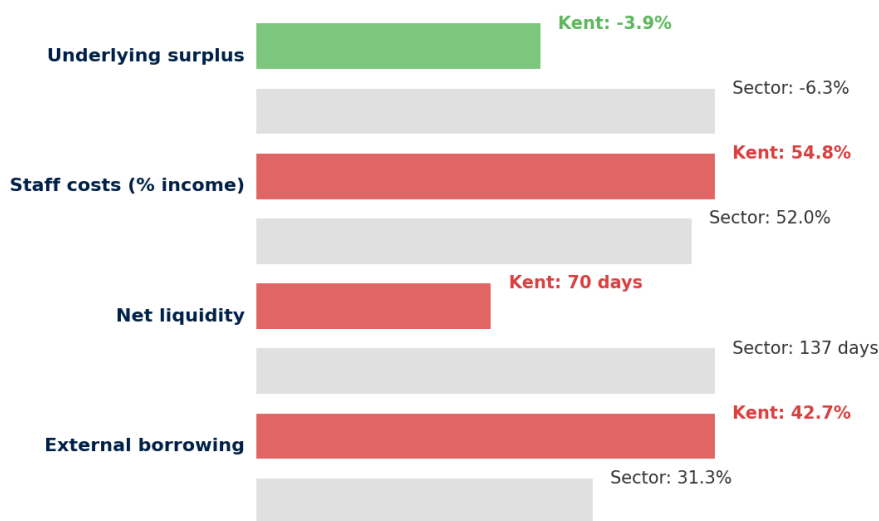
Kent's Blairgowrie Financial Sustainability Index (BFSI) score is **9.1 out of 10**, placing it in the **Sustainable** band. This is the strongest reading in the report and provides genuine reassurance about the institution's balance sheet position.

The BFSI is a six-factor composite drawn from HESA financial KPIs: surplus/deficit ratio, staff cost ratio, net liquidity days, external borrowing, net cash flow, and reserves position. Kent's high score is driven primarily by unrestricted reserves of 94.4% of income, which provide a substantial balance sheet buffer.

The reality underneath

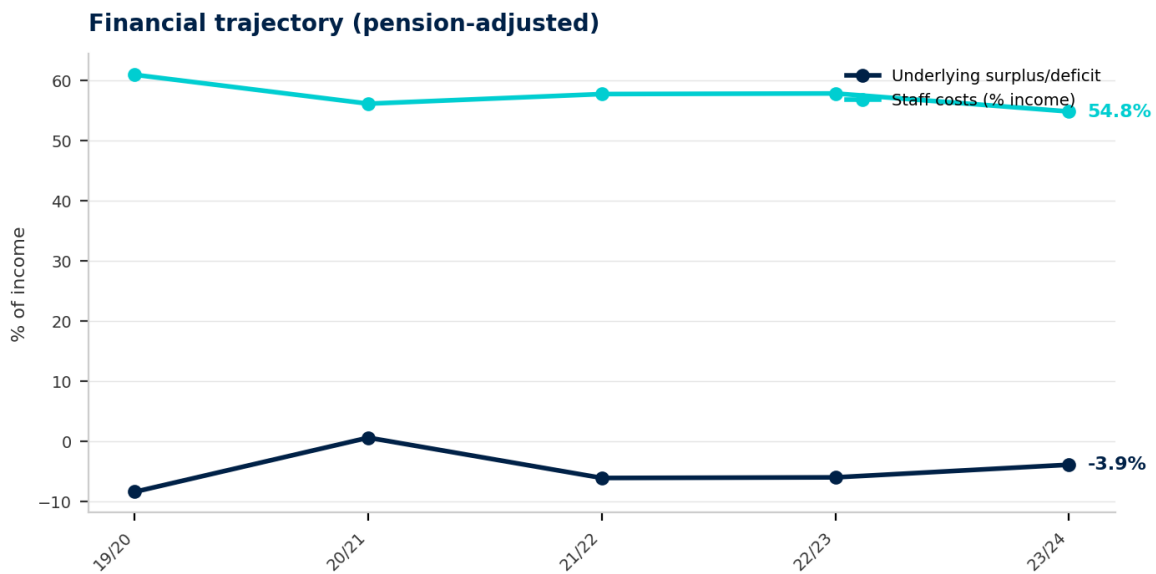
The headline BFSI score masks a more complex operating picture. Kent's reported surplus in 2023/24 was 21.1% of income. Strip out the pension adjustment, and the underlying result is a deficit of -3.9%. This is better than the sector average underlying deficit of -6.3%, but it is still a deficit, and it is the fourth underlying deficit in five years.

Financial position vs sector average (2023/24)



Two figures deserve particular attention. Net liquidity days stand at 70, which is half the sector average of 137. This means Kent has roughly ten weeks of operating cash. That is adequate for normal operations but leaves limited room for the unexpected costs that merger integration inevitably generates. External borrowing at 42.7% of income is significantly above the sector average of 31.3%, which constrains the institution's ability to take on additional debt to fund integration.

The trajectory



There are genuine positives in the financial trajectory. Staff costs have been reduced from 60.9% to 54.8% of income over five years. The underlying deficit has narrowed from -6.0% in 2022/23 to -3.9% in 2023/24. Liquidity has improved from 37 days in 2022/23 to 70 days in 2023/24.

But these improvements have been achieved through cost reduction rather than income growth, and the underlying position remains negative. The financial model is one of managed contraction: cutting costs to keep pace with declining income. This is not sustainable indefinitely, and it is not the financial profile of an institution investing for growth.

What this means for the merger

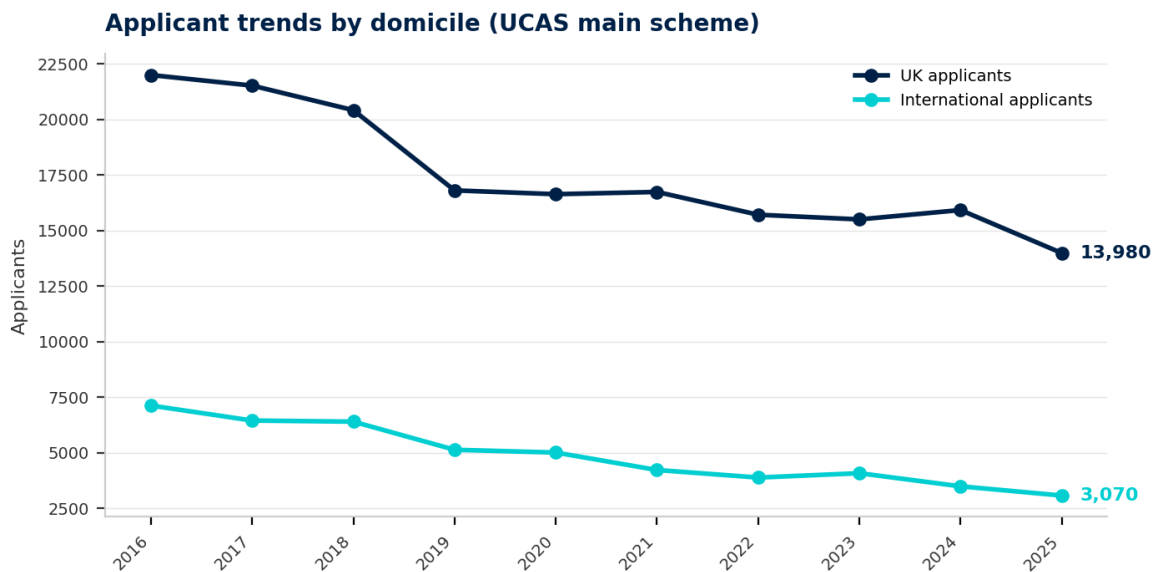
The BFSI score of 9.1 tells the board that Kent is not in immediate financial danger. The reserves provide a buffer, and the balance sheet is not distressed. But the operating reality is different. Kent enters the merger with a structural operating deficit, below-average liquidity, above-average borrowing, and a cost base that has already been cut significantly. The question is not whether Kent can afford to merge. The question is whether the financial model for the merged institution accounts for integration costs on top of the ongoing structural deficit, and whether the cost savings from the merger materialise quickly enough to offset them.

The board should be asking: What is LASEUG's financial model, and does it account for integration costs alongside Kent's ongoing structural deficit?

Market Position

The demand story

Kent's demand picture is the most significant finding in this report. The scale of the decline is greater than the previous version of the report captured, because the full UCAS dataset reveals a collapse in international demand that the UK-only figures do not show.



Over nine years, Kent has lost 12,065 applicants. That is a 41.5% decline. To put it in concrete terms: the Kent of 2016 attracted nearly 30,000 applicants. The Kent of 2025 attracts 17,000. If acceptance rates hold, this translates directly into fewer students, less fee income, and a smaller institution.

Where the decline is coming from

The international decline is the sharper story. Kent has lost 4,050 international applicants since 2016, a 56.9% reduction. In the most recent cycle, international applicants fell to 3,070, down from 3,485 the previous year. This decline pre-dates the most recent visa policy changes, suggesting it reflects a longer-term weakening of Kent's international competitive position rather than a single policy shock.

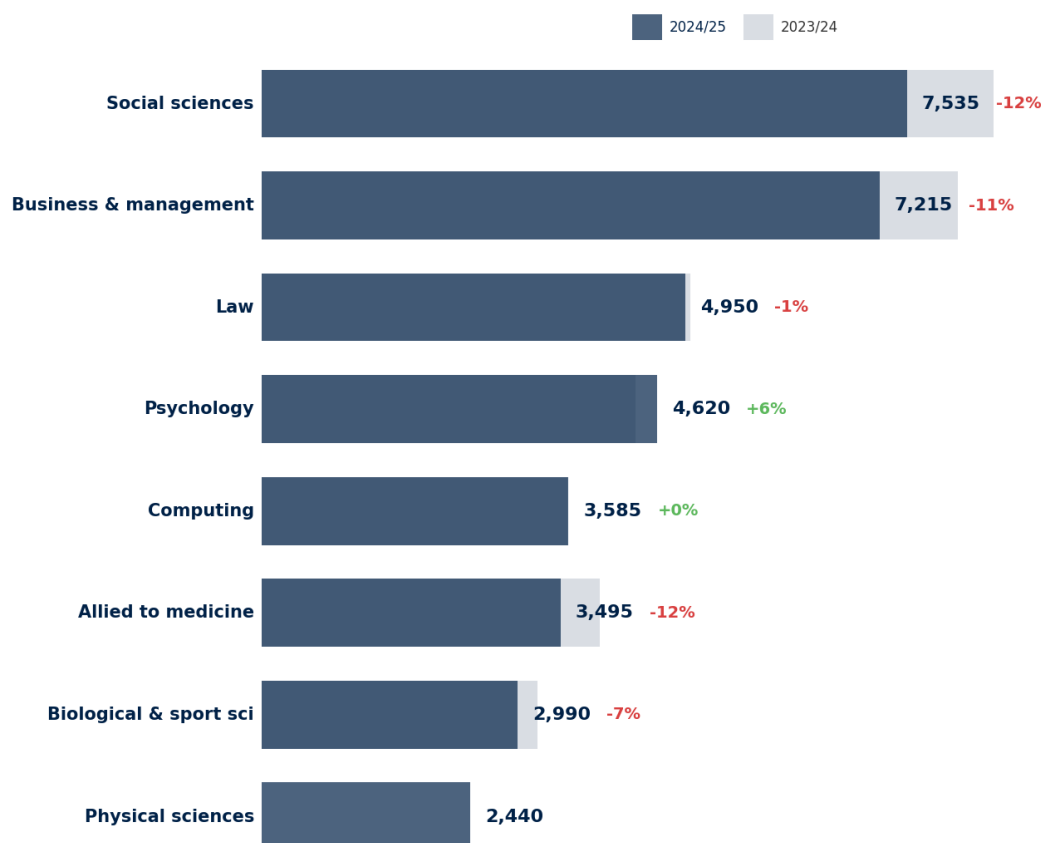
The UK decline is slower but relentless. UK applicants have fallen from 21,990 to 13,980 over nine years (down 36.4%), with no recovery year. The 2025 cycle saw the sharpest single-year drop: 15,915 to 13,980, a fall of 12.2%.

Subject concentration

Kent's enrolment is concentrated in subjects that face intense competition. Social Sciences (7,535 students) and Business and Management (7,215) together account for roughly 30% of total enrolment. Both declined between 2023/24 and 2024/25. Law (4,950) and Psychology (4,620) are the

next largest areas. These are all subjects where London institutions hold a significant locational advantage, particularly for international students.

Subject portfolio: enrolment by area (2024/25 vs 2023/24)



What this means

The demand trajectory is the single most important risk factor in this report. It drives financial pressure, drives restructuring, and is the underlying reason for the merger. The board needs to be confident that the merged institution has a credible plan to stabilise and eventually reverse this trend. If LASEUG simply combines two applicant pools without addressing the competitive dynamics that caused Kent’s decline, the problem will persist at a larger scale.

Student Experience

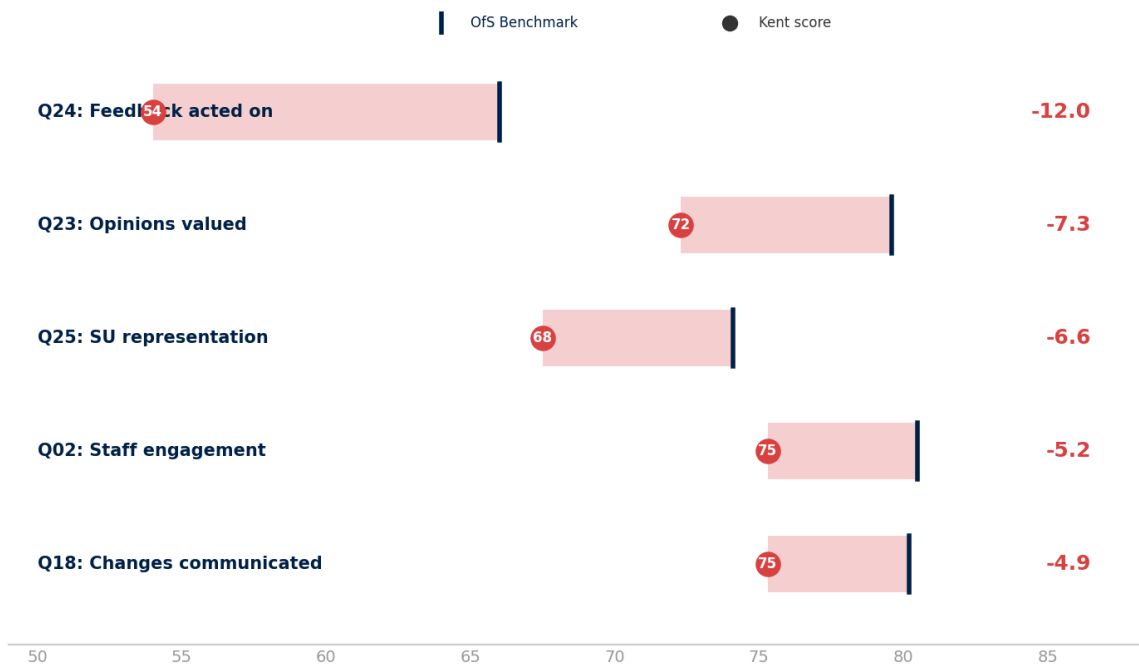
What students are saying



The NSS data paints a consistent picture. Kent is not catastrophically bad on any theme. It is slightly below where it should be on almost everything, and significantly below on the one theme that matters most during a period of change: Student Voice.

The individual question results reveal where the gaps are widest:

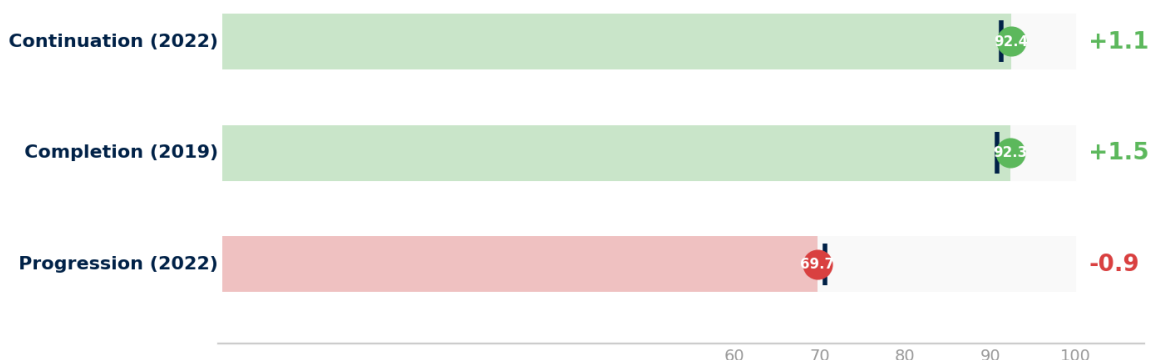
NSS question-level gaps (sorted by largest deficit)



These are not questions about buildings or equipment. There are questions about whether students feel the institution is listening to them, communicating with them, and responding to what they say. A university where only 54% of students believe their feedback is acted on has a fundamental problem with institutional responsiveness.

Student outcomes

Student outcomes vs OfS benchmark



The outcomes data provide a more encouraging picture. Continuation and completion are above the benchmark. Students who choose Kent tend to stay and graduate. This is a genuine strength and one that the merged institution should protect.

Progression is marginally below the benchmark but not at a level that would trigger regulatory concern. The challenge for Kent is that “meeting benchmark” on graduate outcomes is not a selling

point in a competitive market. Students choosing between Kent and a London alternative will weigh employment prospects, and Kent's outcomes do not yet offer a distinctive advantage.

What this means

The student experience data tells two stories. The first is that Kent delivers a functional degree that students complete at above-average rates. The second is that students do not feel the institution is responsive to their feedback. Both stories matter for the merger. The completion strength gives the merged institution a foundation to build on. The weakness in responsiveness will make the transition period harder, because students who already feel unheard will be more anxious and less forgiving when merger-related disruptions affect their experience.

The board should be asking: What is the plan for student communication during the merger transition, and who is responsible for ensuring student voice is heard throughout the integration?

Institutional Context

Strategy: what Kent says and what the data shows

Kent's published strategy, "Kent 2025", sets out a vision of becoming "one of the best education and student experiences amongst UK universities" and "one of the leading civic universities." The strategy is built around five core values: valuing education and research equally, community and collegiality, embracing change, excellence and potential, and diversity.

These are reasonable aspirations. The problem is that the data in this report does not support the claim that they have been achieved. NSS scores are below benchmark on six of seven themes. Applications have fallen 41.5% in nine years. Enrolment has declined every year for the past six years. Staff restructuring has been continuous.

The gap between stated values and observed outcomes is not unusual in higher education. Many institutions have strategies that are more aspirational than descriptive. But the size of the gap at Kent is notable and relevant to the merger, as LASEUG will need a strategy grounded in a realistic assessment of where the combined institution starts.

The "Kent 2025" strategy has now expired. It has been superseded by the merger, which represents the de facto strategic direction. No public replacement strategy has been published.

The merger

In January 2026, Kent and Greenwich announced formal plans to merge as the London and South East Universities Group (LASEUG), with an effective date of 1 August 2026. The merged institution will combine Kent's approximately 16,070 students with Greenwich's approximately 29,695 students and operate across campuses in Canterbury, Medway, and London.

Kent enters the merger as the smaller partner. Its Signal Score of 0.7 compares to a cohort average of 4.2. Its application trend is negative across both domestic and international markets. Its workforce has been through sustained restructuring. The merger represents both an opportunity (access to Greenwich's London market position and scale efficiencies) and a risk (integration costs compounding existing financial pressures, and cultural differences between the two institutions creating friction).

The success of the merger will depend substantially on integration planning, cultural alignment, and the speed with which the merged institution can present a coherent identity to the market. The data in this report suggest that Kent's starting position in this process is weak and that the integration programme will need to account for it.

Leadership

Professor Karen Cox was confirmed as Vice-Chancellor in September 2025, having taken office in 2023. She is leading the institution through the pre-merger period.

Regulatory position

The University of Kent is registered with the Office for Students. At the time of this report, the institution does not appear on the OfS specific conditions list, suggesting no ongoing enhanced monitoring or regulatory sanctions are currently in place. Governors are advised to confirm the current registration status directly via the OfS register, particularly given the forthcoming merger.

Questions for Governors

Based on this analysis, the following questions are recommended for board-level consideration:

1. **Merger readiness.** The Signal Score of 0.7 places Kent in the bottom decile for organisational culture. What specific evidence exists that the institution's culture can support a merger of this scale, and what investment is being made in change management capacity?
2. **Staff capacity.** With 146 individuals receiving severance in 2023/24 and staff costs reduced by six percentage points over five years, what is the board's assessment of remaining workforce capacity and morale? Has any internal staff survey or pulse check been conducted?
3. **Student voice.** Only 54% of students believe their feedback is acted on. What mechanisms are in place to ensure students feel heard during the merger transition, and who is accountable for student communication?
4. **Demand recovery.** Total applicants have fallen 41.5% since 2016, with international applicants down 56.9%. What is the recruitment strategy for the merged institution? Has the business case been tested against continued decline?
5. **Financial integration.** The underlying operating deficit has persisted for four of five years. Net liquidity (70 days) is half the sector average. What is LASEUG's financial model, and does it account for integration costs in addition to Kent's structural deficit?
6. **Strategy.** "Kent 2025" has expired, and no replacement has been published. What is the strategic framework for LASEUG, and when will it be available for governance scrutiny?
7. **Cultural alignment.** Kent and Greenwich are distinct institutions with different cultures, student populations, and market positions. What work has been done to assess cultural compatibility, and what risks have been identified?
8. **Liquidity buffer.** Net liquidity days of 70 are adequate for steady-state operations. Are they sufficient for a period that will involve merger integration costs, potential redundancy payments, and the risk of further enrolment decline?

Methodology

The Signal Score

The Signal Score is a proprietary composite index developed by Blairgowrie HE Advisory. It maps 59 publicly available data points to five dimensions of organisational culture and health. Each dimension is scored on a 0-10 scale and benchmarked against a cohort of 97 English higher education institutions. The composite score is the weighted average of the five dimensions.

The five dimensions are:

- **Staff Involvement:** workforce stability, cost structure, severance activity, contract types
- **Organisational Consistency:** student satisfaction alignment, outcomes consistency, governance indicators
- **Strategic Direction:** demand trends, financial trajectory, strategic investment evidence
- **External Awareness:** graduate outcomes, market responsiveness, competitive positioning
- **Adaptability to Change:** enrolment trends, response to external pressures, change capacity

Financial Sustainability Index

The Blairgowrie Financial Sustainability Index (BFSI) is a six-factor composite drawn from HESA financial KPIs, scored on a 0-10 scale. Where pension adjustments distort headline figures, the report presents both adjusted and underlying positions.

Data sources

This report draws on over 80 million data points held across 17 public datasets, maintained as longitudinal panel databases by Blairgowrie HE Intelligence. The datasets are updated as new releases are published and cover the full English higher education sector.

No proprietary institutional data has been used. Sources include HESA student, staff, and finance returns; UCAS application and acceptance data; the National Student Survey (OfS); OfS B3 student outcomes data; OfS TEF indicators; OfS access and participation data; LEO graduate earnings data; and institutional publications, including strategy documents and financial statements.

Confidence and limitations

Assessment date: 28 May 2026 **Data confidence:** B (Indicative)

The Signal Score is an indicator, not a diagnosis. It identifies patterns in public data that warrant attention. It does not replace internal management information, staff surveys, or direct engagement with the institution. The cohort distribution chart uses illustrative positioning while the full Signal Score database is finalised.

About Blairgowrie HE Intelligence

The analysis in this report draws on public data. Regulators have published it. Universities have disclosed it in their audited accounts. Government bodies have released it in statutory collections. It is available to anyone who looks.

The problem is not access. It is that the data exists in separate places, published by separate bodies for separate purposes, and almost always read in isolation. A policy researcher reads the outcomes data. A bank analyst reads the financial tables. A journalist reads the admissions figures. Each sees a piece. The picture only exists when you read all of them at once, against the same institutions, in the same analytical framework.

Blairgowrie HE Intelligence builds and maintains longitudinal panel databases from 17 public sources, containing over 80 million data points. These databases are updated as new data are released and cover student demand, financial performance, regulatory compliance, quality outcomes, staff and cost structures, and recruitment patterns. The infrastructure that produced this analysis runs continuously. This report is one of its outputs.

For institutions, we do the same work at the individual level.

A vice-chancellor briefing a governing body wants to know what the numbers mean for their specific financial position, their regulatory standing, and the realistic options available to them. A registrar facing a recruitment shortfall wants to know whether the market has moved or whether the institution has. A finance director stress-testing income projections wants to see the sensitivity analysis, not the headline figure. These are not questions a single dataset can answer.

We take data from multiple public sources, read it together against a single institution, and give executive teams analysis they can take into the boardroom and act on.

We work with universities across England on demand forecasting, financial and regulatory risk, access and participation performance, competitive positioning, and workforce cost analysis.

If this report has raised questions about your institution's position, we would be glad to talk.

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This report was produced by Blairgowrie HE Intelligence. The analysis reflects only publicly available information. No information was obtained from any source under an obligation of confidence.