

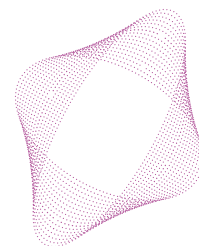
PATTERNS AND TRENDS

IN UK HIGHER EDUCATION

2015



Universities UK



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FOREWORD



This year's Patterns and trends report considers the decade between 2004–05 and 2013–14, which was a period of considerable change for the UK's higher education sector. The data presented here is one part of a complex picture that is frequently driven by many interacting factors, and which is experienced differently in different institutions.

One of the biggest changes was the introduction in 2012–13 of a new undergraduate funding system. This has made the financial picture for universities much more complex, with many universities experiencing greater uncertainty and volatility in their funding models. The funding systems in each of the four UK nations are also now different from each other. Overall there is a significant shift in the main source of funding, as the proportion of income across the UK made up of funding body grants has fallen from 39% to 20% and the proportion made up by tuition fees has risen from 24% to 44%. With the particular loss of capital grants for the renewal and upgrade of facilities and estates, universities have tried where possible to build their internal funds in order to finance much-needed infrastructure investment.

The student body has changed over the period as well, becoming younger and with a higher proportion of full-time students, as the declines in the number of part-time and mature students noted in previous editions of *Patterns and trends* have continued. Full-time students now make up 74% of the student body, up from 62% at the start of the decade, and under-25s now make up three quarters of all undergraduates and a third of postgraduates. The number of students registered for 'other undergraduate' study (studying for foundation degrees, certificates and diplomas, and for institutional credit) has also continued to fall, dropping by a concerning 56% over the decade.

As well as changes in the age of students and their mode of study, the student body has become more cosmopolitan over the decade. Students from outside the EU now make up 13% of the student body, up from 9% in 2004–05. Behind this headline figure is a more complex story of shifting markets, with, for example, the number of students coming from India (the second largest source of international students for the past five years) falling by 49% from a 2009–10 peak. This fall and the growing number of international students going to competitor countries is fuelling concern about the UK's ability to attract international students. In 2011–12, non-EU students contributed £7.2 billion to the UK economy with their tuition fees, accommodation and off-campus expenditure.



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One of the outstanding successes of the decade is the increase in students from a disadvantaged background entering our universities. Across the UK 18-year-olds from disadvantaged backgrounds are more likely than ever to apply for and be given a place at our universities. This has led to an increase of 42% in the number of students from disadvantaged backgrounds studying full time for a first degree between 2005 and 2014, and is testament to the effort put into widening participation by universities over the past decade.

The sector has also had great success in the outcomes for graduates. The latest longitudinal Destinations of Leavers from Higher Education survey shows that 95% of the class of 2010–11 were employed or undertaking further study three and a half years after graduating. Their average salary was £26,000.

To supplement this report, an online annexe (available on the Universities UK website) presents information on the diversity of UK higher education providers and their students, staff and income.

There has been an increase of 42% in the number of students from disadvantaged backgrounds studying full time for a first degree between 2005 and 2014.



INTRODUCTION



The ten years between September 2004 and the summer of 2014 saw significant change for UK higher education. There were ongoing reductions in public funding across the four UK nations, an economic downturn, and, in the penultimate year of the period, the introduction of a new undergraduate funding system.

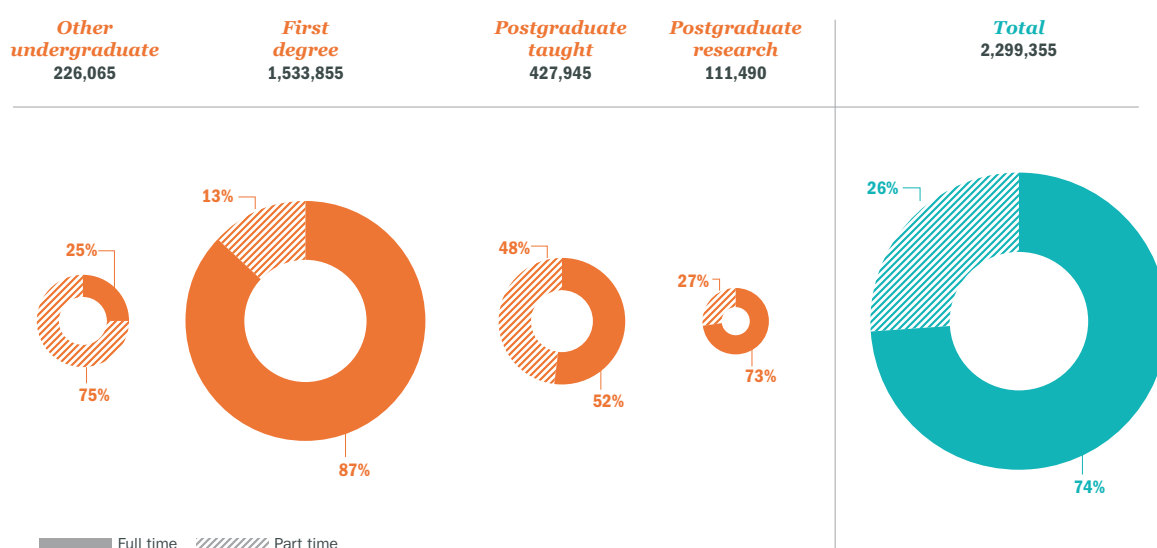
This report presents the patterns and trends in data on students, staff and the finances of higher education providers¹ over that ten-year period, and covers two years since the introduction of the reformed funding system.

To give a sense of the shape of the UK's higher education sector, in 2013–14 UK universities were teaching around 2.3 million students, 67% (1.5 million) of whom were studying for first degrees. A further 19% (427,945) of those students were studying for postgraduate taught qualifications, 10% were studying for other undergraduate degrees² (226,065), and 5% (111,490) were studying for postgraduate research degrees. The majority of students – 1.7 million – were studying for their qualification full time. However, this varied at the different levels of study from as high as 87% of first degree students, to as low as 25% of other undergraduates (see Figure 1).

In 2013–14 UK universities were teaching around 2.3 million students.

FIGURE 1

Students at higher education providers by level and mode of study, 2013–14



Source: HESA Student record

In the same year, the providers making up the UK's higher education sector were employing 395,780 staff, 49% of whom were on academic contracts. The total income across the sector was £30.7 billion and total expenditure was slightly lower, at £29.4 billion.

While this report covers information on UK higher education in total, it is supplemented by an online annexe (available at www.universitiesuk.ac.uk/highereducation/Pages/PatternsAndTrends2015.aspx) presenting information on the student and staff body and finances at a provider level. These 37 charts show, among other things, the proportion of part-time students in each provider, the proportion of mature full-time undergraduate students, the proportion of female academic staff, the proportion of ethnic minority academic staff, surplus/deficit as a percentage of income, and income from non-EU student fees at institutional level at 160 of the UK's higher education providers. These charts help to demonstrate the great diversity within UK higher education.

1 See Note on data.

2 Other undergraduate provision includes foundation degrees, Higher National Certificates and Diplomas, undergraduate certificates, and studying for institutional credit.

Note on data

In 2013–14 there were 159 higher education providers, excluding further education colleges, in the UK in receipt of public funding via one of the UK funding councils and this report features aggregated data from all 159 plus the University of Buckingham. The analysis in this report does not cover other higher education providers, including alternative providers or further education colleges, unless explicitly stated.

The report also excludes data for the University of Wales (central functions), which has staff but no students. To ensure that figures for the number of students studying in each country reflect the actual number of students studying in that country for each year, Open University students have been split out to their country of study.

The majority of the data used in this report has been provided by the Higher Education Statistics Agency (HESA). All HESA figures quoted in the report which relate to student and staff numbers have been rounded to the nearest five in accordance with HESA data protection protocols. All percentages have been calculated using the raw figures and rounded, therefore rounded figures may not sum precisely.

The data on which the charts in this report are based is available to download from Universities UK website at www.universitiesuk.ac.uk/highereducation/Pages/PatternsAndTrends2015.aspx.

CHAPTER 1

STUDENTS



In 2013–14 there were 995,740 entrants to 160 higher education providers in the UK, 15,105 fewer than in 2004–05. However, the rate of change fluctuated across the period and across the modes and levels of study.

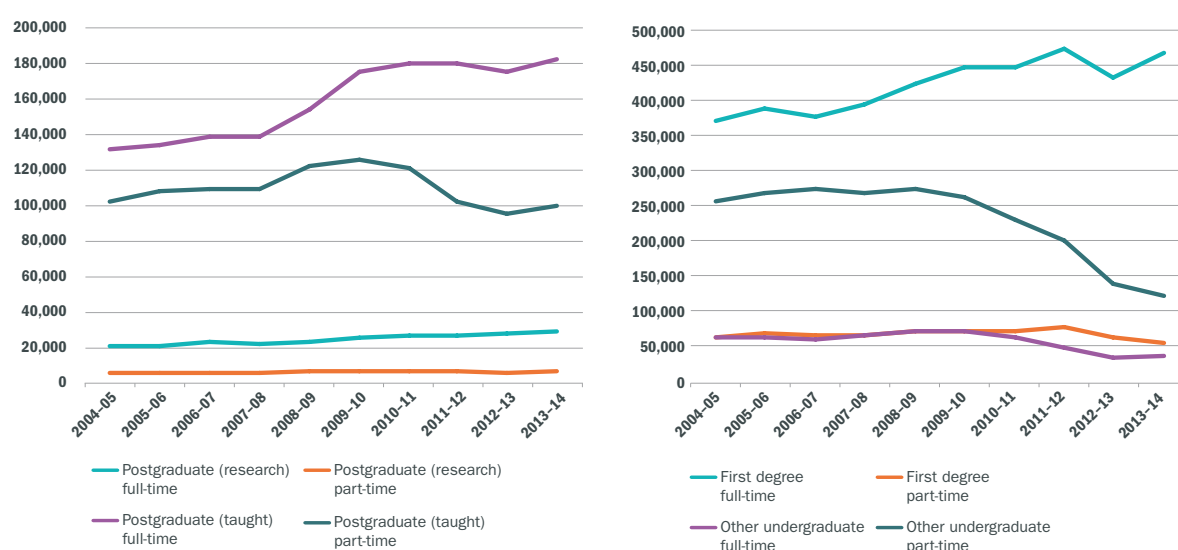
1.1 ENTRANTS TO HIGHER EDUCATION

While full-time first degree, postgraduate taught and postgraduate research entrants rose considerably over the period (by 26.5%, 38.8% and 41.1% respectively), part-time first degree and postgraduate taught entrants declined, as did entrants to both modes of other undergraduate study.

Part-time first degree entrants fell by 12.2% over the whole ten-year period, with much of the decline between 2011–12 and 2013–14 (the years before and after the introduction of undergraduate tuition fee reforms, during which period entrants fell by 30.6%). Other undergraduate entrants fell by considerably more, with full-time falling by 44.6% between 2004–05 and 2013–14, and part-time falling by 52.7% in the same period.

FIGURE 2

Entrants by mode and level of study, 2004–05 to 2013–14



Source: HESA Student record

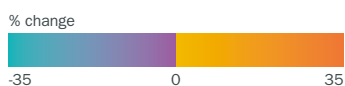
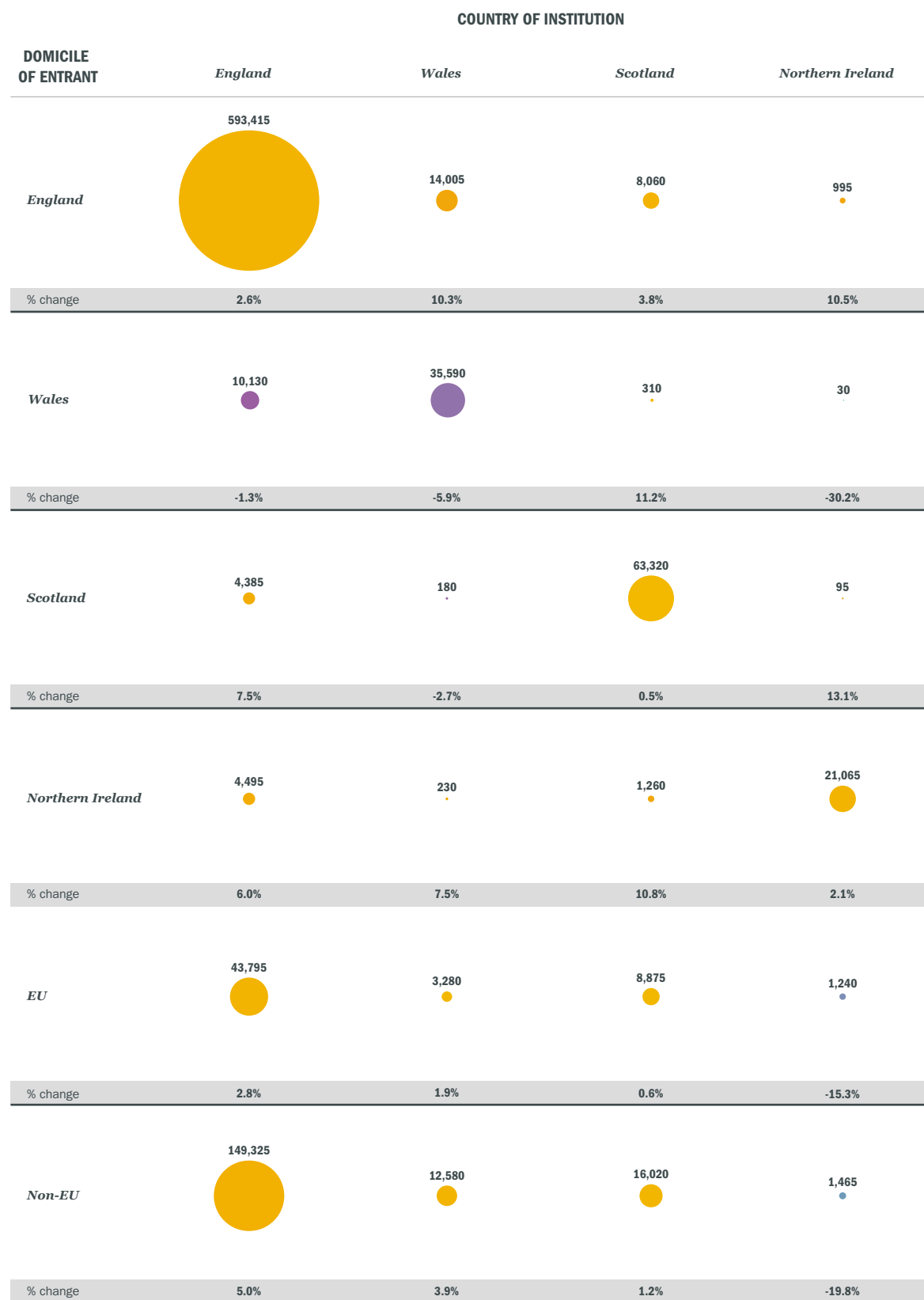
Analysis by the independent Student Funding Panel established by Universities UK in 2014 has shown that a number of factors have converged to create a particularly challenging environment for part-time study in England.³ The number of students entering part-time study in recent years has been affected by the removal in 2008–09 of funding for students taking qualifications equivalent to or lower than ones which they already had, and by reforms to undergraduate funding in 2012–13, including an increase in fees following cuts to teaching grants and issues around eligibility for tuition fee loans. At the same time the economic downturn has also caused a reduction in the number of students able to self-fund part-time study, and a reduction in the number of employers willing to support employees through part-time study.

The distribution of entrants to higher education varies across the UK. Figure 3 shows the distribution of undergraduate and postgraduate entrants from each of the four UK nations, the EU and the rest of the world to providers in the four UK nations in 2013–14, with the percentage change since 2012–13.

³ Student Funding Panel (2015) *An analysis of the design, impact and options for reform of the student fees and loans system in England*

FIGURE 3

Cross-border flows of student entrants by domicile and country of provider, 2012–13 to 2013–14



Source: HESA Student record

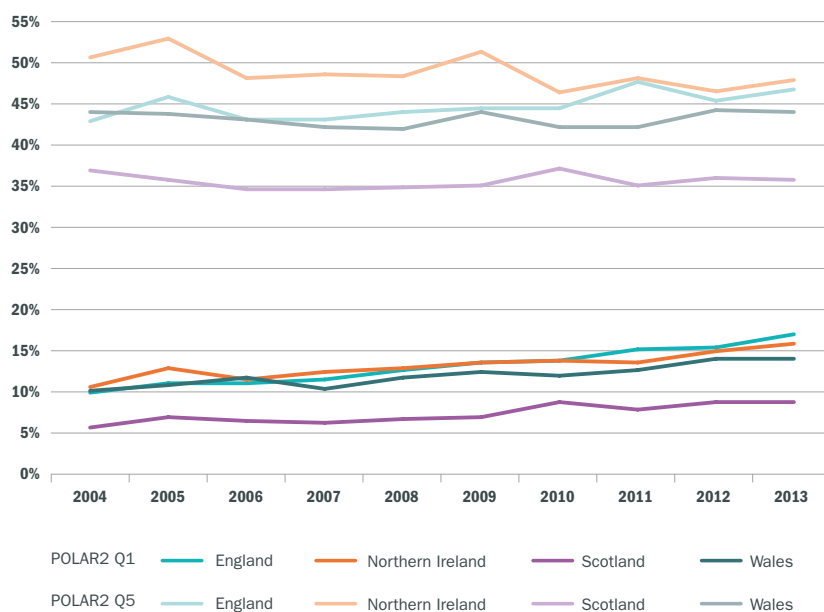
The colour of the bubbles indicates the percentage change and shows that there was an increase in entrants to English providers from all domiciles except Wales (this was due to falls in the number of part-time and postgraduate entrants), following a strong decline in 2012–13. Scotland is the only country in the UK to have seen increases in student entrants from all domiciles. The size of the bubbles indicates the numbers involved.

Full-time young undergraduate entrants make up the highest proportion of all entrants, and demand from 18-year-olds remains high. The proportion of 18-year-olds applying for full-time undergraduate education through UCAS has risen throughout the UK over the period, though in England and Northern Ireland it dipped in 2012 following the reforms to undergraduate funding. The proportion of 18-year-olds accepted for full-time undergraduate study via UCAS (the entry rate) has also risen and was at its highest ever level in all four UK countries in 2013, though the rise has not been straightforward. Entries as a proportion of the 18-year-old population ranged from 24.2% in Scotland (where fewer applicants use UCAS), to 36.2% in Northern Ireland.

The proportion of 18-year-olds accepted for full-time undergraduate study reached its highest ever level in all four UK countries in 2013.

The entry rate varies more by student background, with gaps of up to 32 percentage points between those 18-year-olds from areas which have the highest levels of participation in higher education (POLAR2 quintile 5) and those which have the lowest (POLAR2 quintile 1).⁴ Although in all UK countries the entry rates for quintile 1 have increased more straightforwardly and faster than those for quintile 5, the gap remains high. In 2013 in England, 18-year-olds in quintile 5 were 2.7 times more likely to enter university than those in quintile 1.

FIGURE 4
18-year-old entry rates by UK country and background, 2004 to 2013



Source: UCAS, End of Cycle report 2013

4 Using the POLAR2 classification developed by the Higher Education Funding Council for England (HEFCE). This classifies small areas across the UK into five groups according to their level of young participation (entry at age 18 or 19) in higher education. Each of these groups represents around 20% of young people and are ranked from quintile 1 (areas with the lowest young participation rates, considered as the most disadvantaged) to quintile 5 (highest young participation rates, considered most advantaged).

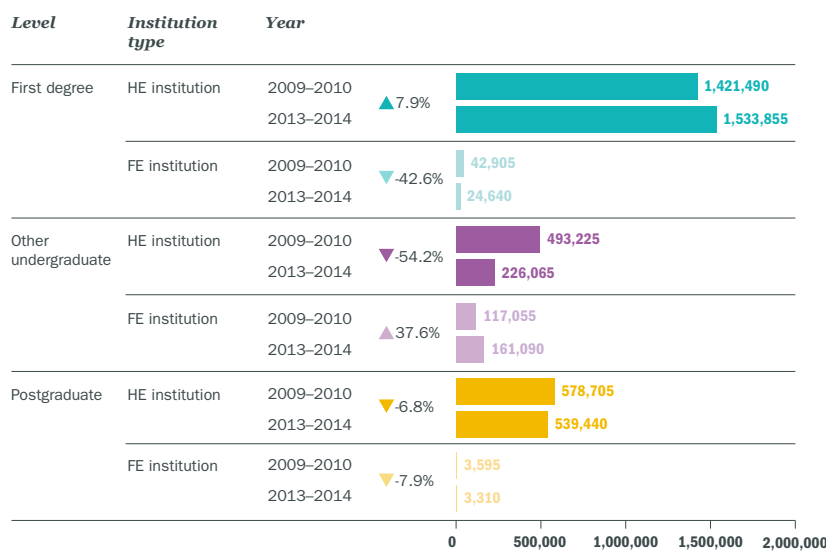
1.2 STUDENTS BY PROVIDER, LEVEL AND MODE OF STUDY

While we have already discussed changes in entrants to higher education between 2004–05 and 2013–14, changes in the total student body have taken effect more slowly and are different in further education colleges and higher education institutions. As Figure 5 shows, the number of other undergraduates registered at further education colleges grew considerably (by 37.6% or 44,035) between 2009–10 and 2013–14, but the number of first degree students and postgraduates fell, by 42.6% (or 18,265 students) and 7.9% (or 285 students) respectively. The pattern partially reverses at higher education institutions: other undergraduate numbers were down by 54.2% (267,160 students) and postgraduate student numbers were down by 6.8% (39,265 students), but first degree students were up by 7.9% (112,365 students). These changes in other undergraduate numbers are partly a result of further education colleges now offering their own other undergraduate provision rather than offering degrees in franchise with universities (under these arrangements the students were listed under the higher education institution’s statistical return). But given the numbers involved this can only be a partial explanation.

Numbers studying at higher education providers increased over the ten years by 2.8%, from 2.2 million to 2.3 million.

FIGURE 5

Higher education students by provider type and level of study, 2009–10 and 2013–14

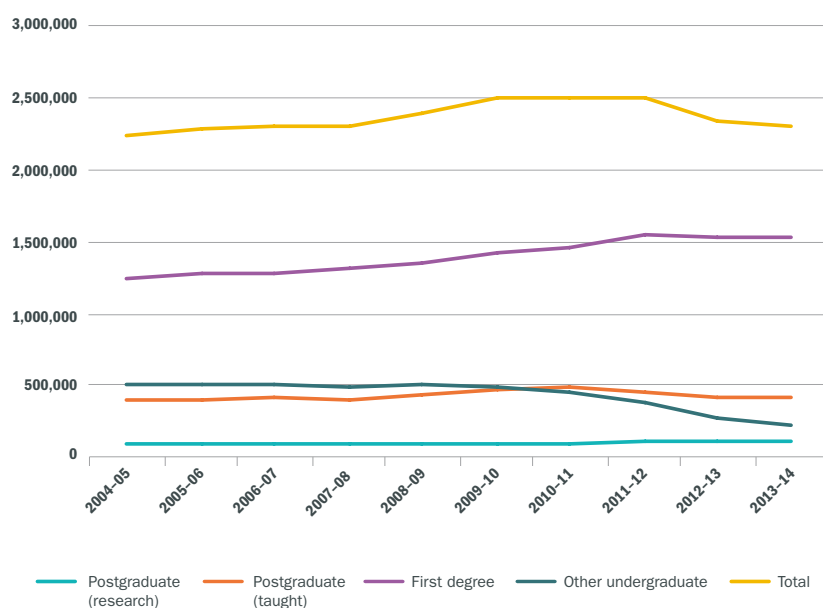


Source: HESA HE statistics for the UK

Looking solely at higher education institutions, the number of students studying at all levels increased over the ten years by 2.8%, from 2.2 million to 2.3 million (Figure 6). The only overall decrease between 2004–05 and 2013–14 has been in other undergraduate students, which have fallen by 56.3%. Over the ten-year period first degree students increased by 24.0%, postgraduate research students by 27.2%, and postgraduate taught students by 8.4%.

FIGURE 6

Total number of students by level of study, 2004–05 to 2013–14



Source: HESA Student record

Table 1 shows the annual change in student population by level. It is worth noting that despite the overall increases across the period for undergraduate and postgraduate taught students, the increases between 2012–13 and 2013–14 were lower than in previous years, and, in the case of postgraduate taught students, are not enough to reverse two years of significant decreases. It is also notable that the total number of students has fallen annually since its peak (of 2.5 million) in 2010–11, coinciding with a period of demographic decline in the young population and a fall in the number of people studying part time.

TABLE 1

Annual change in student population by level of study, 2004–05 to 2013–14

	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
OTHER UNDERGRADUATE	0.9%	-1.2%	0.9%	-3.4%	1.9%	-2.8%	-9.1%	-13.8%	-28.8%	-17.9%
FIRST DEGREE	2.2%	3.3%	0.7%	1.6%	3.4%	5.2%	3.0%	5.3%	-0.8%	0.4%
POSTGRADUATE (TAUGHT)	1.2%	2.4%	2.0%	-1.2%	8.5%	8.5%	1.1%	-5.2%	-7.0%	0.1%
POSTGRADUATE (RESEARCH)	0.3%	1.0%	2.1%	3.5%	1.2%	4.5%	5.0%	5.0%	0.1%	2.2%
TOTAL	1.6%	2.0%	1.0%	0.1%	3.9%	4.1%	0.3%	-0.2%	-6.3%	-1.7%

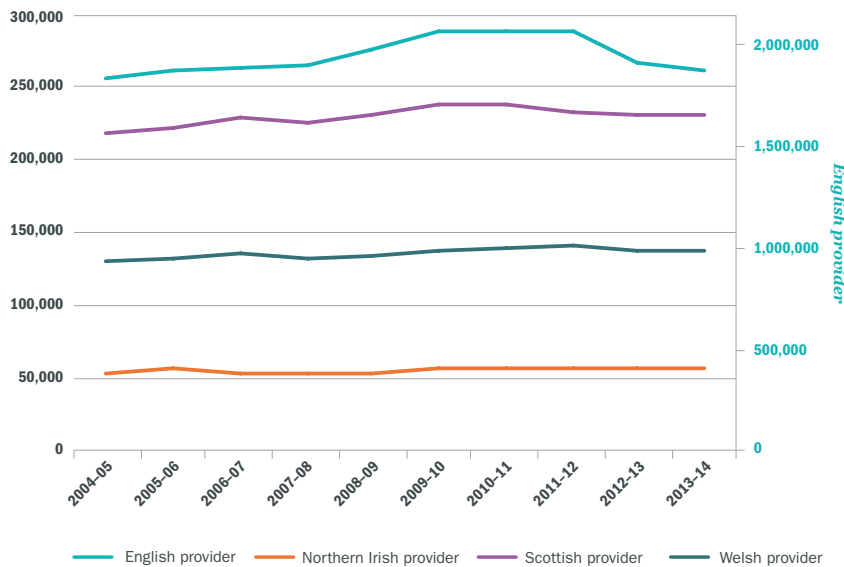
Source: HESA Student record

Because this data is UK-wide, it hides some differences between students registered at providers in the four UK nations, as shown in Figure 7. Northern Irish and Welsh providers saw sharp rises in their student numbers in the year before the introduction of ‘top-up’ tuition fees (2005–06 in Northern Ireland and 2006–07 in Wales) before falling back. Scottish providers also saw a sharp rise in 2006–07 before falling back, while student numbers at English providers rose steadily at the beginning of the period. From 2007–08 higher education providers in all four countries saw their student numbers rise dramatically until 2010–11, when they plateaued for two years. In 2012–13 student numbers in England, Scotland and Wales all fell (in England’s case markedly so) and continued to fall in 2013–14.

In all four nations student numbers ended the period higher than they started it, but while in England this rise was 2.2%, in Scotland, Northern Ireland and Wales the rises were all above 5%. At both the UK and national level, these annual changes will have been shaped by a range of factors, from changes in policy at a national level (as with the 2012 reforms to higher education in England) to fluctuating population levels in different countries.

FIGURE 7

Total student numbers by country of provider, 2004–05 to 2013–14



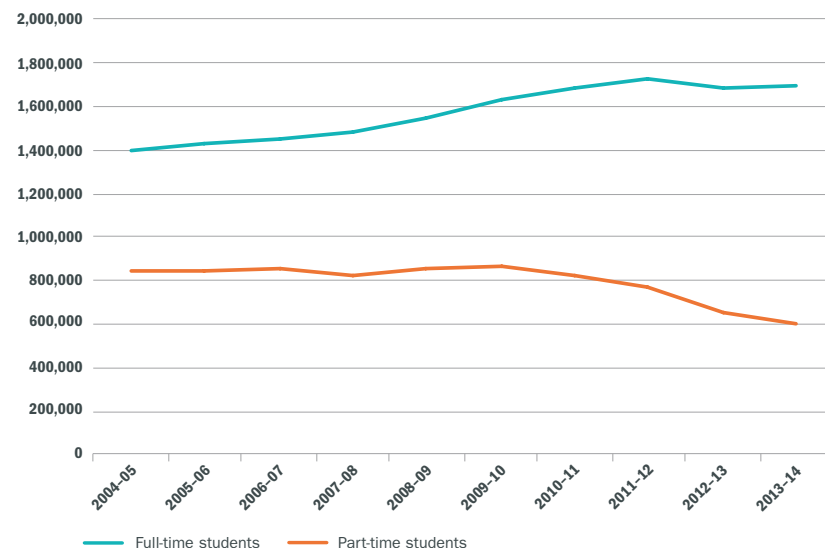
Source: HESA Student record

As we saw earlier, in the section on entrants to higher education, the numbers registering for part-time higher education have fallen across the period. While full-time registrations rose annually until 2012–13 and have increased by 21.9% since 2004–05, part-time registrations remained broadly stable until 2010–11, when they fell and have continued to fall for the rest of the period (Figure 8). Part-time registrations are now 28.6% lower than in 2004–05.

Part-time registrations are now 28.6% lower than in 2004–05.

FIGURE 8

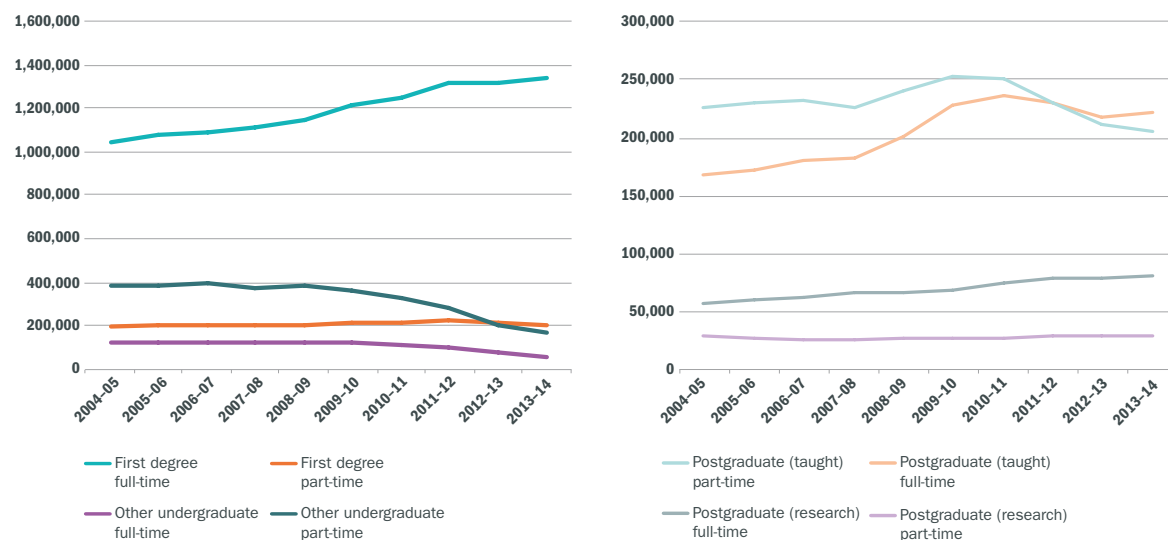
Students by mode of study, 2004–05 to 2013–14



Source: HESA Student record

As Figure 9 shows, the reduction is partly a result of falling student numbers for part-time postgraduate taught degrees, down by 9.4% from their 2004–05 level and 18.5% from their peak of 252,030 in 2009–10. In 2011–12, part-time postgraduate taught registrations fell below full-time postgraduate taught registrations, having started the period 35% higher. Part-time postgraduate research student numbers fell at the beginning of the period but have since regained lost ground, while part-time first degree students rose from 2007–08 to 2011–12 before falling.

FIGURE 9
Students by level and mode of study, 2004–05 to 2013–14



Source: HESA Student record

The majority of the fall, however, has come from other undergraduate students, with part-time registrations having fallen by 56.8% over the period, a slightly larger fall than the fall in total other undergraduate numbers of 56.3%. Figure 10 shows the trends in other undergraduate student numbers by broad course aim during the period, with the biggest falls coming from students studying for undergraduate certificates and diplomas (down by 76.6% in the period). This fall shows the switch by students from certificates and diplomas to foundation degrees at the beginning of the period. From 2009 it shows the influence of changes the Department of Health made to entry qualifications for the nursing profession, with all new nurses to be degree-educated by 2013.⁵

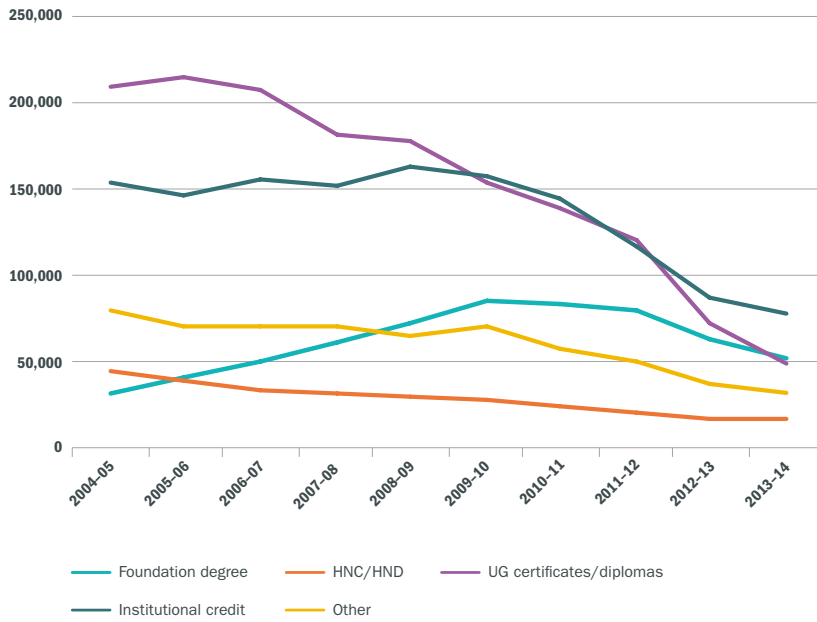
The data also shows the considerable falls in students studying for institutional credit and it is possible that these students have now moved to non-credit-bearing courses, which do not appear in HESA’s statistical returns. Students registered on courses for institutional credit peaked in 2008–09, and figures for university income from providing non-credit-bearing courses for individuals show that this increased by 48.5% between 2008–09 and 2013–14.⁶

5 Department of Health press release (12 November 2009) ‘Nursing set to become all graduate entry by 2013’, available at: http://webarchive.nationalarchives.gov.uk/+www.dh.gov.uk/en/MediaCentre/Pressreleasesarchive/DH_108359

6 HESA (multiple years) Higher Education – Business and Community Interaction survey

FIGURE 10

Other undergraduate students by broad course aim, 2004–05 to 2013–14



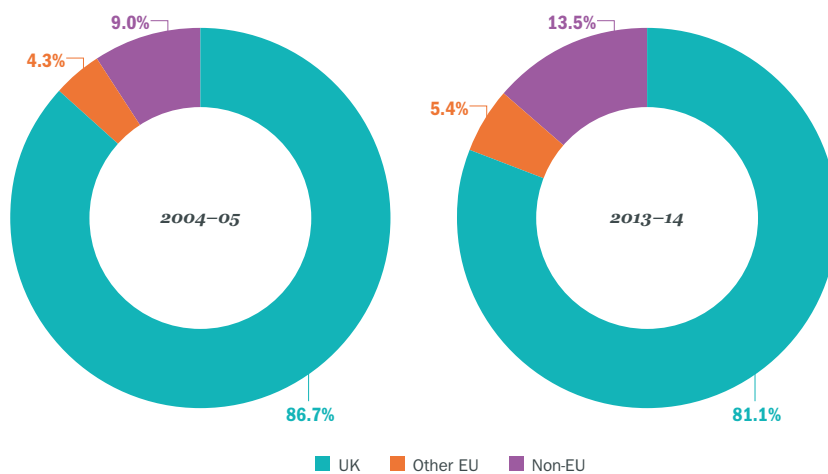
Source: HESA Student record

1.3 INTERNATIONAL STUDENTS

While the majority of students at UK higher education providers are from the UK, an increasing proportion are from elsewhere in the world. In 2004–05, 4.3% of students came from the EU (excluding the UK) and 9.0% came from outside the EU; in 2013–14 those respective proportions were 5.4% and 13.5% (see Figure 11).

FIGURE 11

Students by domicile, 2004–05 and 2013–14



Source: HESA Student record

This hides a fall in the numbers of EU students in 2012–13, with EU students 5.5% lower in 2013–14 than they were in 2011–12.

Within each level of study the pattern of student domiciles varies, as Table 2 shows. At first degree level, non-EU students grew in number by 58,450 between 2004–05 and 2013–14, but remained a small share of a much larger population (moving from 6.4% of first degree students in 2004–05 to 9.0% in 2013–14). At postgraduate taught level, the increase was smaller in numerical terms (45,390), but because of the smaller numbers overall non-EU students grew as a proportion of postgraduate taught students from 20.3% to 29.2%. This is similar to the proportion of non-EU students at postgraduate research level, where along with EU students they make up over two-fifths of all students.

The proportion of non-EU students varies quite widely between subjects as well as by level. Just under a quarter of those studying for qualifications in engineering in 2013–14 were from outside the EU, compared to just 4.1% studying for the same level of qualification in education.

Just under a quarter of those studying for qualifications in engineering in 2013–14 were from outside the EU.

TABLE 2

Students by domicile and level of study, 2004–05 and 2013–14

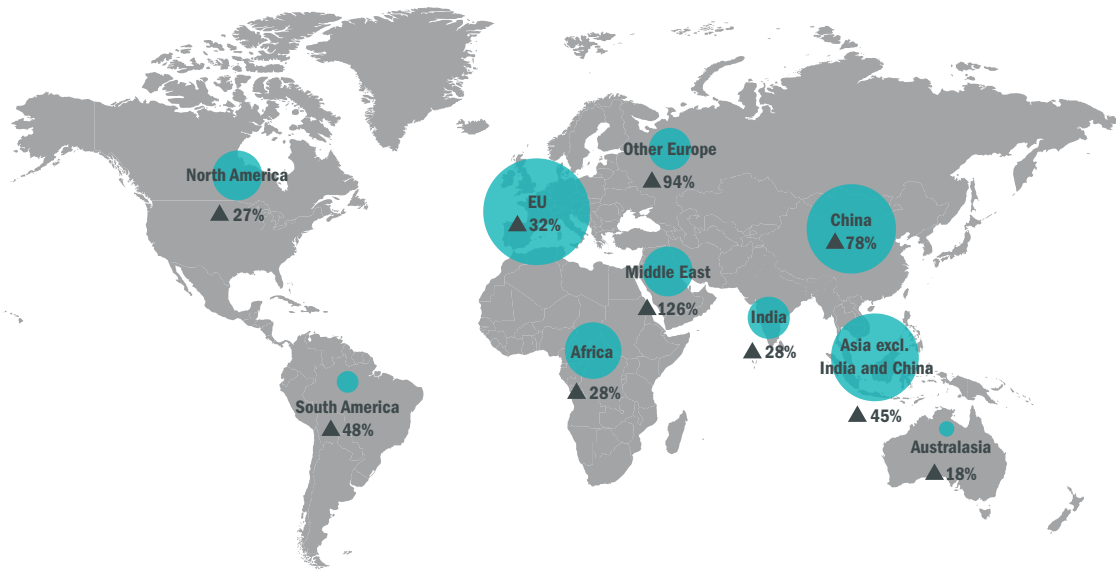
	UK		OTHER EU		NON-EU	
	2004-05	2013-14	2004-05	2013-14	2004-05	2013-14
OTHER UNDERGRADUATE	487,930	205,410	10,145	5,745	18,895	14,905
% SHARE	94.4%	90.9%	2.0%	2.5%	3.7%	6.6%
FIRST DEGREE	1,113,535	1,323,305	44,010	73,100	79,415	137,450
% SHARE	90.0%	86.3%	3.6%	4.8%	6.4%	9.0%
POSTGRADUATE TAUGHT	285,695	271,030	28,950	31,955	80,010	124,960
% SHARE	72.4%	63.3%	7.3%	7.5%	20.3%	29.2%
POSTGRADUATE RESEARCH	51,985	64,110	10,885	14,500	24,810	32,880
% SHARE	59.3%	57.5%	12.4%	13.0%	28.3%	29.5%

Source: HESA Student record

Figure 12 shows the region of origin of non-UK students in 2004–05 and 2013–14, with bubbles showing the proportions they make up of all non-UK students. The EU was the biggest source of students, at 29%, followed by China and the rest of Asia excluding India and China. Over the ten years between 2004–05 and 2013–14, the numbers of students coming from China have risen by 78%. In the same period the numbers of students coming from India have increased by 28%, but this hides a decrease of 49% over the last five years. The region with the largest growth over the period was the Middle East, which grew by 126%.

FIGURE 12

Change in non-UK students by region of origin, 2004–05 and 2013–14



Non-UK students by region of origin

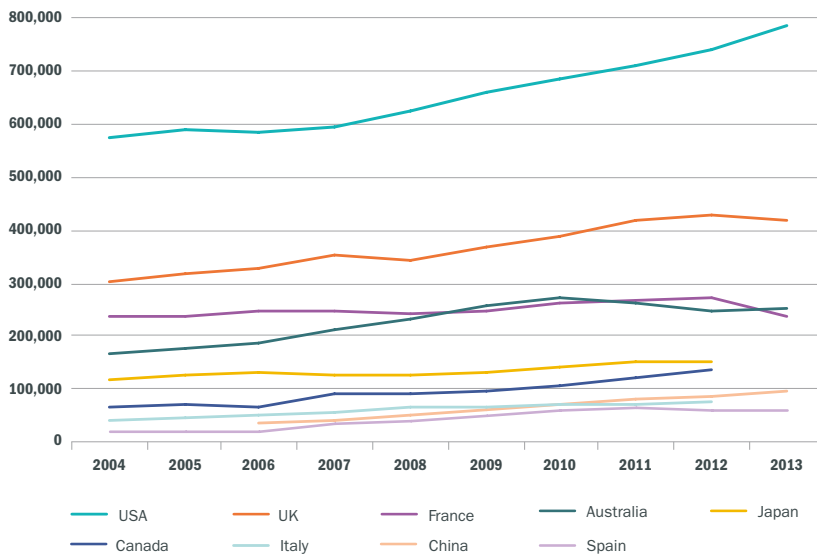
	2004–05	2013–14	% SHARE OF TOTAL, 2013–14
EU	95,250	125,300	28.8%
OTHER EUROPE	10,090	19,525	4.5%
AFRICA	27,525	35,095	8.1%
ASIA EXCL. INDIA AND CHINA	58,635	84,895	19.5%
CHINA	49,405	87,895	20.2%
INDIA	15,410	19,750	4.5%
AUSTRALASIA	2,185	2,580	0.6%
MIDDLE EAST	12,180	27,520	6.3%
NORTH AMERICA	21,570	27,340	6.3%
SOUTH AMERICA	3,595	5,310	1.2%

Source: HESA Student record

The number of international students studying in the UK rose over the period but growth in 2012 was small and in 2013 the numbers fell (Figure 13). The United States remains considerably ahead of the UK in attracting international students and had growth of 5.9% between 2012 and 2013. Other competitor countries, like Canada and Australia, saw bigger percentage increases than the UK in their international student registrations over the decade, and new competitors like China are also seeing impressive growth.

FIGURE 13

International student numbers, 2004 to 2013



Source: UNESCO Institute of Statistics Education database
Data from 2004, 2005 and 2013 is not available for all countries.

This and the decline in students from India are fuelling concern about the UK’s ability to attract international students, which could damage the higher education sector. International student fee income accounted for 13% of sector income in 2013–14, and demand from international students can support the provision of certain strategically-important subjects in the UK (eg engineering, technology and computer science, particularly at postgraduate level where around half of all students are from outside the EU). Higher education is important to the wider UK economy, with non-EU students contributing £7.2 billion to the UK economy and supporting around 137,000 jobs through their tuition fees, accommodation and off-campus expenditure in 2011–12. Educating international students has also helped the UK’s soft power, with a study of international alumni by the Department for Business, Innovation and Skills (BIS) asserting that many became ‘informal ambassadors for the UK’.⁷

Non-EU students contributed £7.2 billion to the UK economy in 2011–12.

1.4 STUDENT PROFILES AND SUBJECTS OF STUDY

The student body in 2013–14 varied by gender and ethnicity as well as by region of origin. In 2013–14, 56.1% of students were female. Within this there was some variation by level of study. At first degree level 55.1% of students were female while at postgraduate research level 47.0% of students were female (this increased from 44.5% in 2004–05). At the same time, there was variation by domicile and a higher proportion – 50.1% – of non-EU students are male (Table 3). The gender split varies even more widely by country: 82.2% of students from Bangladesh were male, compared to just 31.2% of students from Jamaica.

⁷ BIS (2013) *The wider benefits of international higher education in the UK*

TABLE 3

Gender of students by domicile, 2013–14

	FEMALE	MALE
UK	57.3%	42.7%
OTHER EU	53.7%	46.3%
NON-EU	49.9%	50.1%

Source: HESA Student record

As can be expected, there were considerable differences in the age range of students depending on their level of study (Figure 14 shows this in detail), but the overall picture is one of growth for students under 30 and decline in students aged 30 and older. Figure 15 shows the percentage change each year in undergraduates and postgraduates under and over 30 years old. It shows that between 2004–05 and 2011–12 the number of undergraduate students aged under 30 increased each year, falling only in the last two years of our period of study, while undergraduates aged 30 and over either remained stable or fell in all ten years. During the same period, the number of postgraduate students aged under 30 rose every year except 2011–12 and 2012–13 (although these were considerable falls which have not yet been recovered) and postgraduate students over 30 had two years of growth in 2008–09 and 2009–10, but otherwise remained stable or fell. While this sets out the trends for age groups under and over age 30, there was some variation from these broader trends in smaller age groupings.

FIGURES 14

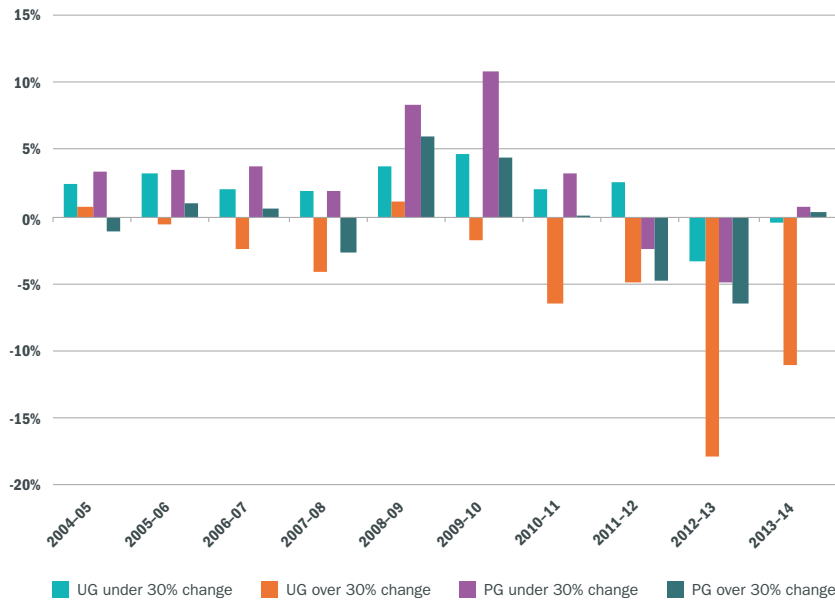
Students by age group and level of study, 2004–05 to 2013–14



Source: HESA Student record

FIGURE 15

Annual percentage change in students by age group, 2004–05 to 2013–14



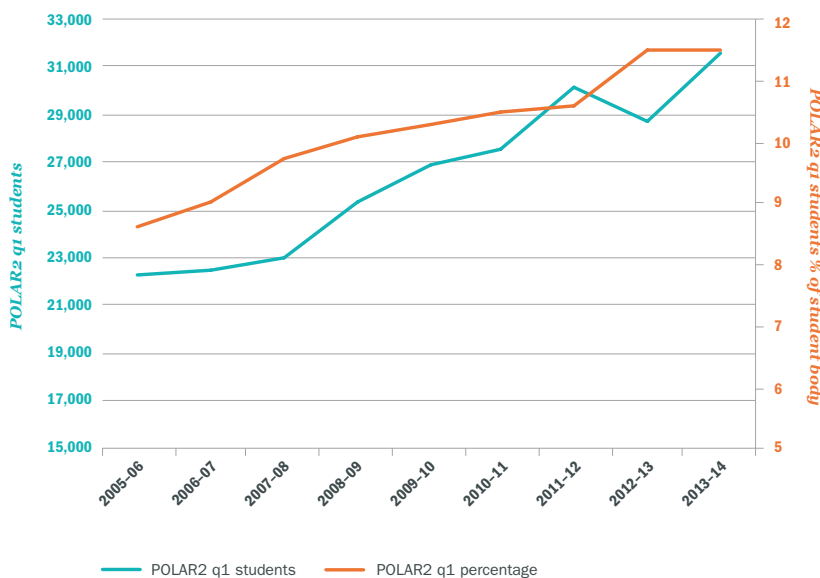
Source: HESA Student record

As part of its commitment to increasing diversity, the UK higher education sector also monitors a number of other characteristics of the student body. One is the number of students in higher education from disadvantaged backgrounds, assessed by POLAR. Both the number and the percentage of POLAR2 quintile 1 students in UK universities have increased since 2005–06 (the first year for which data is available). The absolute number of students increased each year except 2012–13 (when student numbers fell more generally) to reach 31,570 and the proportion they made of the student body rose to a new high of 11.5% in 2012–13 (Figure 16).

Both the number and the percentage of POLAR2 quintile 1 students in UK universities have increased since 2005–06 by over 30%.

FIGURE 16

POLAR2 quintile 1 full-time first degree students at UK higher education providers, 2005–06 to 2013–14

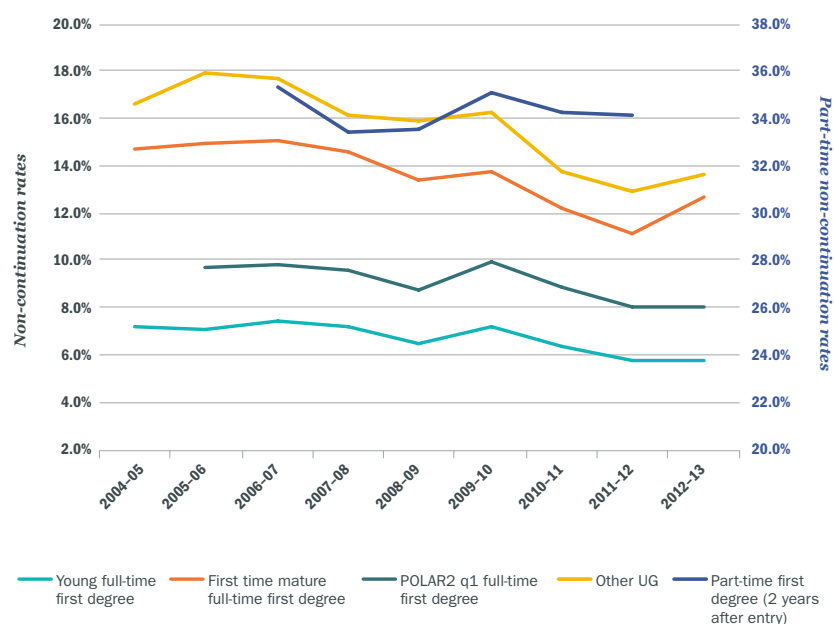


Source: HESA UKPIs

It is not enough for students from non-traditional backgrounds to start university, however, if they are not supported through to graduation. HESA also measures undergraduate student non-continuation rates as part of its annual performance indicators, looking at the proportion of students who do not continue into their second year (or third year for part-time students). Figure 17 shows the falling non-continuation rates for students from a number of non-traditional backgrounds against the non-continuation rate for young full-time first degree students. Although in all cases the rates have fallen during the period, they remain higher than that for traditional first degree students, and the decrease has not been straightforward. HEFCE has also identified that although slightly higher proportions of black and minority ethnic (BME) and POLAR3 quintile 1 students in England intend to continue on to postgraduate education than their white and POLAR quintile 5 counterparts, a smaller proportion of them actually go on to do so.⁸

FIGURE 17

Undergraduate students no longer in higher education one year after entry, 2004–05 to 2013–14



Source: HESA UKPIs

Changes in student choice at the level of broad subject groups between 2004–05 and 2013–14 also demonstrate how the student body is altering over time, and how universities are adapting to a changing population and economy.

As Table 4 shows, the three subjects with the largest increases in absolute numbers were biological sciences (up by 61,945 or 42.6%), business and administrative studies (up by 46,145 or 15.9%), and engineering (up by 26,985 or 20.4%). In the same period two of what had been the largest subject areas, subjects allied to medicine and education, fell by 23,635 (8.0%) and 25,105 (12.7%) respectively, and computer science fell even more, by 36,795 (28.7%). There has been considerable growth in the number of students entering all science, technology, engineering and mathematics (STEM) degrees except computing. However, it is worth noting that a large proportion of these students are international so these subjects remain vulnerable to any volatility in the international student market.

A large proportion of STEM students are international so these subjects remain vulnerable to any volatility in the international student market.

8 HEFCE (2015) *Higher Education in England 2015, Key Facts*

TABLE 4

Students by subject of study, 2004–05 and 2013–14

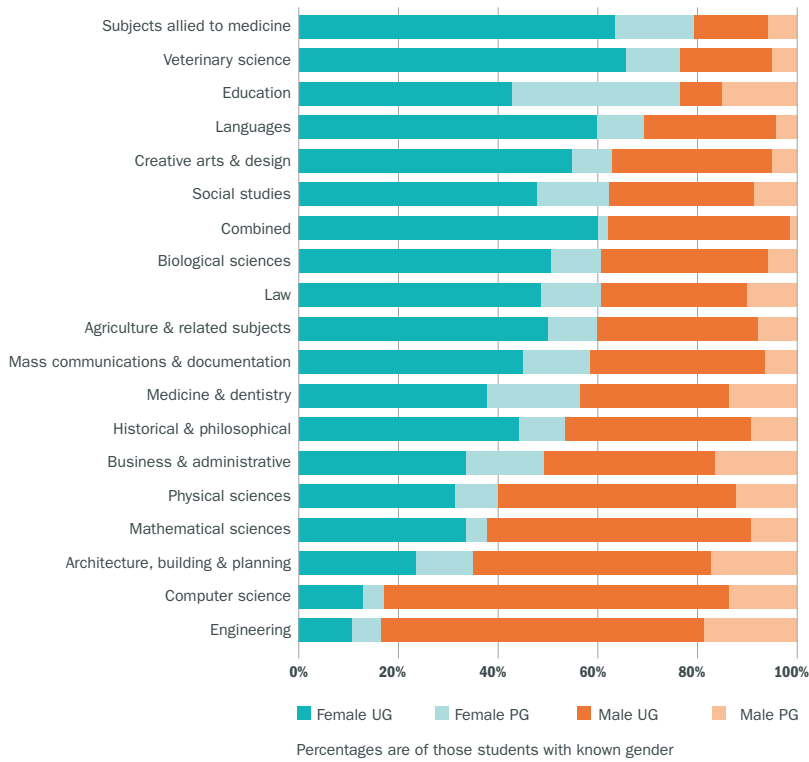
	2004-05	2013-14		CHANGE		% CHANGE
BIOLOGICAL SCIENCES	145,570	207,515		61,945		42.6%
VETERINARY SCIENCE	4,210	5,935		1,725		41.0%
MATHEMATICAL SCIENCES	30,560	42,225		11,665		38.2%
MEDICINE & DENTISTRY	53,695	67,360		13,665		25.4%
AGRICULTURE & RELATED SUBJECTS	14,735	18,360		3,625		24.6%
PHYSICAL SCIENCES	75,080	93,265		18,185		24.2%
ENGINEERING	132,025	159,010		26,985		20.4%
BUSINESS & ADMINISTRATIVE STUDIES	290,455	336,600		46,145		15.9%
CREATIVE ARTS & DESIGN	147,215	168,860		21,645		14.7%
SOCIAL STUDIES	189,425	210,580		21,155		11.2%
MASS COMMUNICATIONS & DOCUMENTATION	45,720	49,525		3,805		8.3%
LAW	84,610	89,225		4,615		5.5%
ARCHITECTURE, BUILDING & PLANNING	48,770	49,160		390		0.8%
HISTORICAL & PHILOSOPHICAL STUDIES	96,045	89,610		-6,435		-6.7%
SUBJECTS ALLIED TO MEDICINE	296,870	273,235		-23,635		-8.0%
LANGUAGES	131,725	117,660		-14,065		-10.7%
EDUCATION	198,120	173,015		-25,105		-12.7%
COMPUTER SCIENCE	128,360	91,565		-36,795		-28.7%
COMBINED	123,070	56,635		-66,435		-54.0%

Source: HESA Student record

The overall changes in the numbers of students studying each subject through the period hide substantial differences in the proportions of students studying different subjects by level of study and gender (Figure 18) or ethnicity (Figure 19). In 2013–14, the proportions of students at subject level varied as widely as 83.9% men and 16.1% women studying engineering, and 95.7% white students and 4.3% BME students studying veterinary science (the total proportions of BME students are rarely more than a quarter). It is beyond the scope of this report to explore the reasons for these differences, but the wide variation by student profile between subjects is a striking feature of the student population.

FIGURE 18

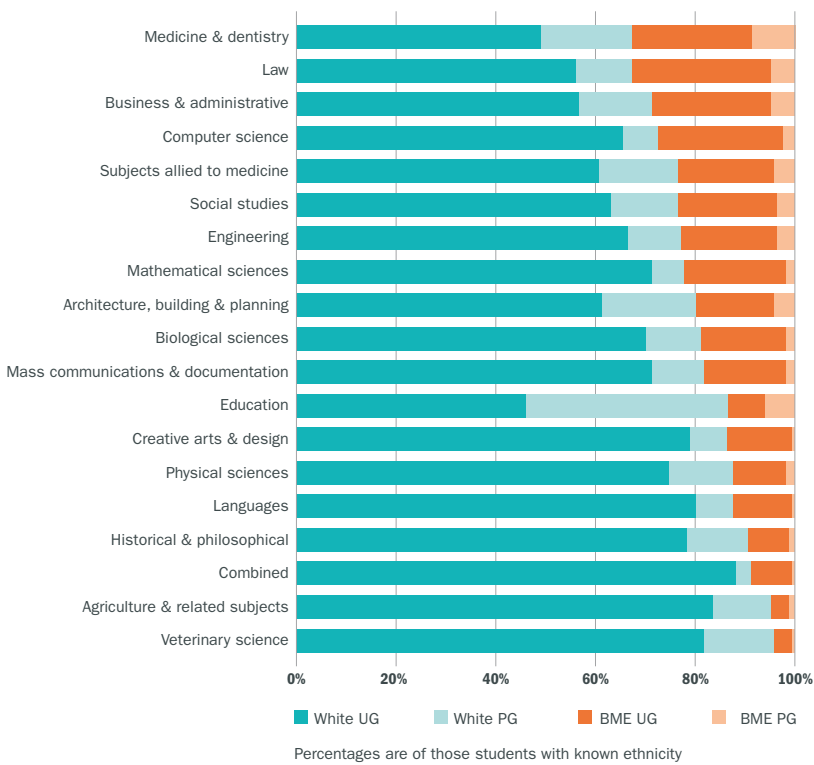
Subject of study by level and gender, 2013–14



Source: HESA Student record

FIGURE 19

Subject of study by level and ethnicity, 2013–14



Source: HESA Student record

1.5 STUDENT OUTCOMES AND EMPLOYMENT

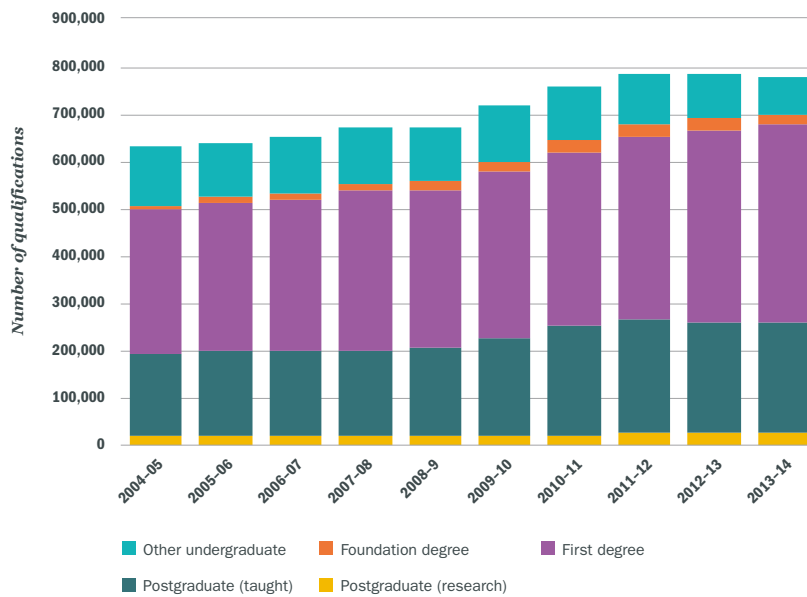
The strong qualification and employment outcomes for students have been one of the great successes of the period.

Between 2004–05 and 2013–14 the number of higher education qualifications awarded each year increased by 144,515 to a total of almost 778,000 (Figure 20). The largest proportional increase has been the 206.6% rise in the number of students leaving with foundation degrees (up by 12,755 to 18,930, though this is down from the 2010–11 peak of 27,305). The numbers leaving with first degrees and postgraduate taught and research qualifications have had more modest percentage increases, at 37.6% (up 115,270), 35.1% (up 60,595) and 28.6% (up 5,490) respectively. The number of other undergraduate qualifications awarded, excluding foundation degrees, fell by 38.5% during period – just less than the fall in entrants – and the proportion they made up of all qualifications awarded shrank from 20.3% to 10.2% over the ten-year period.

The strong qualification and employment outcomes for students have been one of the great successes of the period.

FIGURE 20

Qualifications awarded by level, 2004–05 to 2013–14



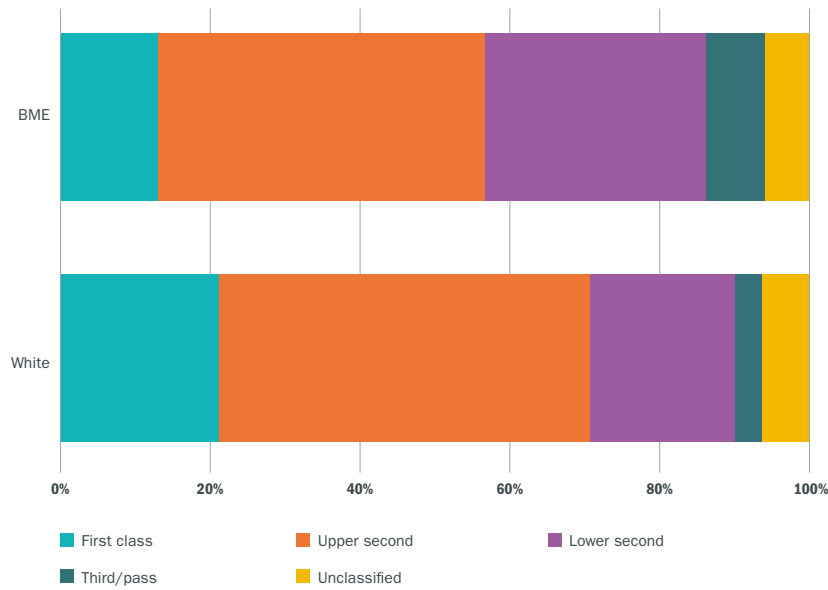
Source: HESA Student record

The qualifications awarded to students vary by ethnicity (Figure 21), with 70.8% of white first degree qualifying students leaving with first or upper second class degrees in 2013–14 against 56.8% of BME students doing the same. Analysis by the Equality Challenge Unit (ECU) does show a small reduction in the gap between white and BME student degree attainment over recent years but it remains considerable, particularly for black qualifying students.⁹

9 Equality Challenge Unit (2014) *Equality in higher education: statistical report 2014*, pp.136–147

FIGURE 21

First degree qualifiers by ethnicity and class of degree, 2013–14



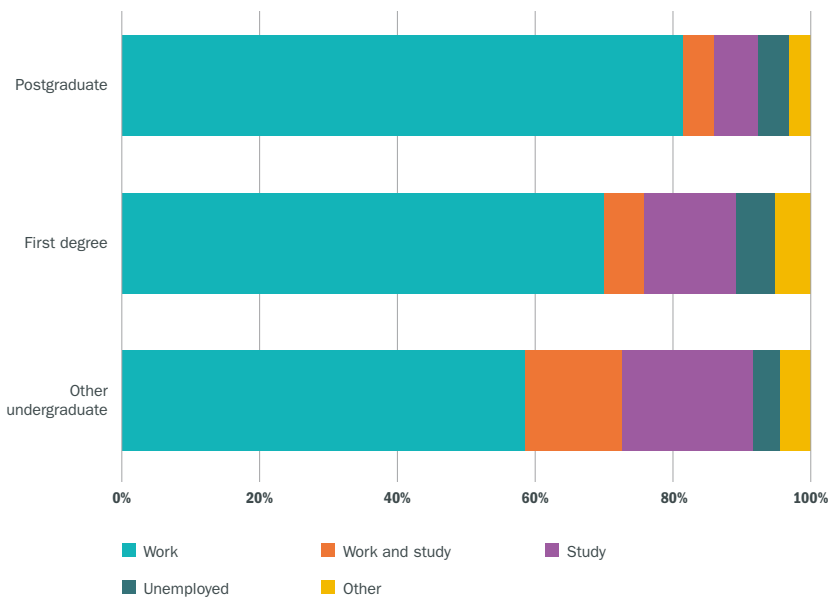
Source: HESA Student record

Higher education qualifications improve students' employment prospects. The 2013–14 Destinations of Leavers from Higher Education (DLHE) survey showed that only six months after their course ended 92% of other undergraduate, 89% of first degree and 92% of postgraduate students were in work or doing further study (Figure 22). The latest longitudinal DLHE survey showed that three and a half years after graduating, 94.9% of the class of 2010–11 were in employment or further study and they were earning on average £26,000.¹⁰

Higher education qualifications improve students' employment prospects.

FIGURE 22

Destination of leavers by level of qualification, 2013–14



Source: HESA DLHE

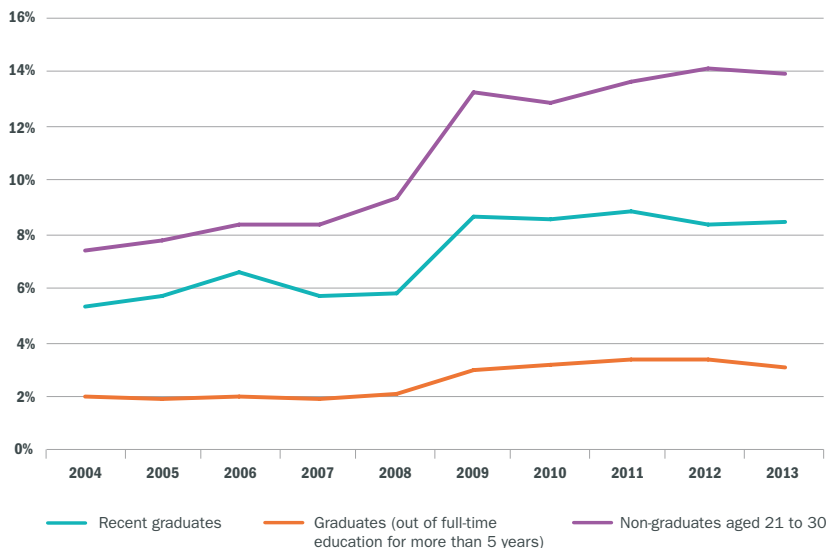
¹⁰ HESA 2015 Destinations of Leavers from Higher Education Longitudinal Survey

Figures from the Office for National Statistics (Figure 23) show that graduates have consistently had lower unemployment rates, even in recessions. Although unemployment rates have risen since 2008, particularly for recent graduates, they have remained considerably below those of non-graduates. Graduates also earn more, and a government report shows that female and male graduates can expect to boost their lifetime earnings by £250,000 and £165,000 respectively.¹¹

Graduates have consistently had lower unemployment rates, even in recessions.

FIGURE 23

Unemployment rates in the UK by group, 2004 to 2013



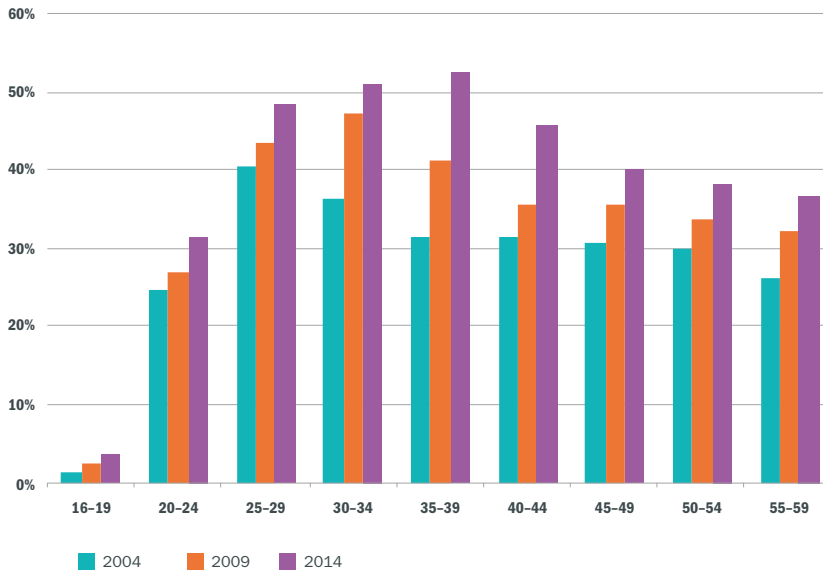
Source: ONS, Graduates in the UK Labour Market 2013

An increasing proportion of the UK population is going to university, and more than half of people in their thirties now have higher education qualifications, up from just 36.4% (for those aged 30–34) and 31.4% (for those aged 35–39) just ten years ago (Figure 24). The number of graduates in employment has increased in all age groups over the past ten years, but the UK is not alone in this increase as other advanced economies are also developing their labour force. The UK has increased the proportion of highly skilled young adults from 32.6% of the population thirty years ago (the proportion of 55 to 64-year-olds with higher education qualifications) to 47.9% (the proportion of 25 to 34-year-olds with the same qualifications). However, this growth has been smaller than in many of our competitors, and the proportion of young adults with higher education qualifications remains lower than in many competitor economies. For example, the Republic of Ireland has nearly doubled the proportion of young adults with tertiary education, from 24.9% to 49.2%, in the same period.

¹¹ BIS (2013) *The impact of university degrees on the lifecycle of earnings*

FIGURES 24

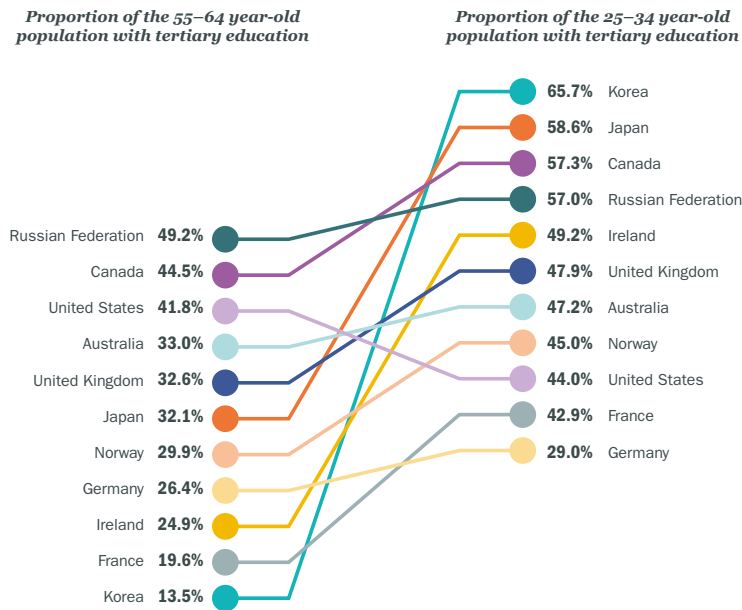
Percentage of UK population in employment with higher education qualifications by age, 2004, 2009 and 2014



Source: HESA from Labour Force Survey and Annual Population Survey

FIGURE 25

Growth in high level skills in the adult population, 2013

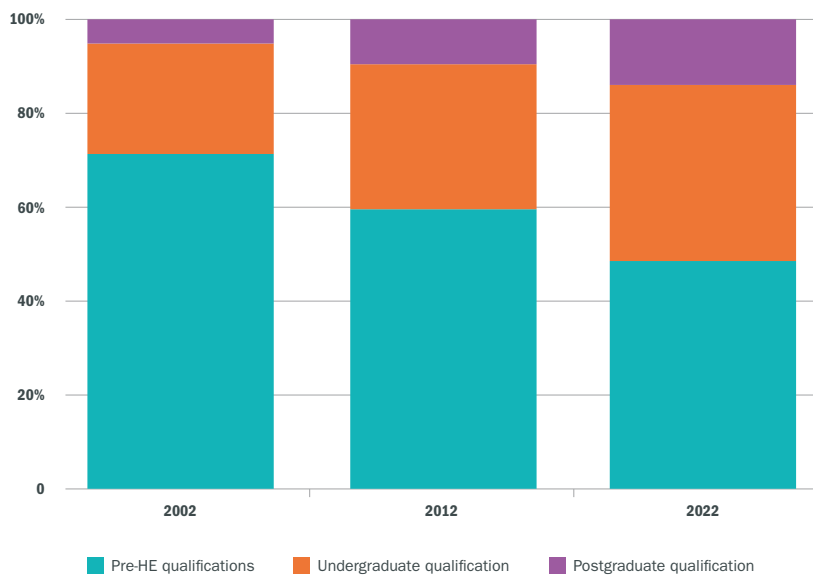


Source: OECD Education at a Glance 2014, A1.3

The increase in the proportion of graduates internationally is meeting a growing demand for higher-level skills in the workforce as the global economy changes. Looking into the future, the UK Commission for Employment and Skills has calculated that the proportion of those in employment with undergraduate and postgraduate qualifications – which they use as an indication of the demand for these skills – will rise from 28.7% in 2002 to 51.3% in 2022, while those employed with skills below this level will fall from 71.4% in 2002 to less than half, 48.7%, in 2022 (Figure 26). It is clear that as the economy changes universities will play an increasingly central role in developing the UK workforce.

The increase in the proportion of graduates internationally is meeting a growing demand for higher-level skills in the workforce as the global economy changes.

FIGURE 26
Changing qualification pattern of employment, 2002, 2012 and 2022



Source: UKCES (2014) Working Futures 2012–2022

CHAPTER 2

STAFF

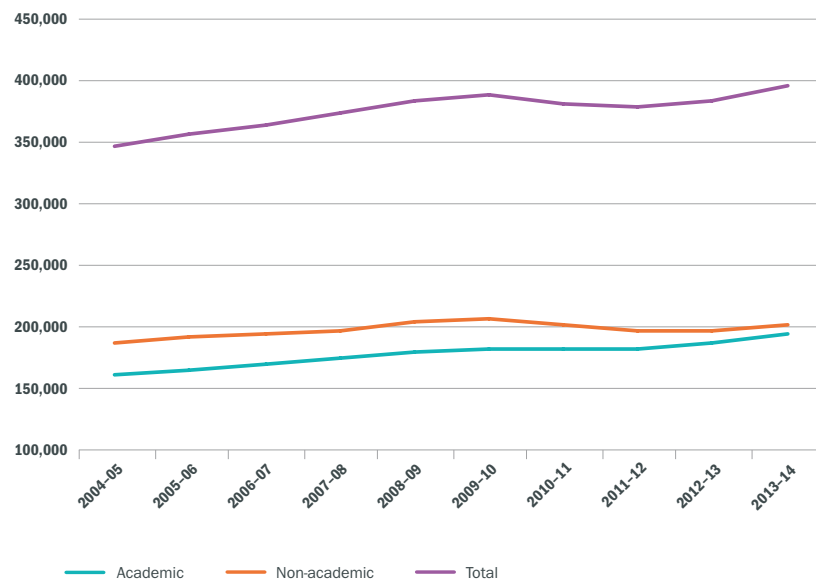


In 2013–14 there were 395,780 staff employed by higher education providers,¹² an increase of 14.3% since 2004–05. The gap between academic and non-academic staff is at its smallest point for the past ten years.

The net growth in staff numbers across this period is 49,475, 67.9% of which is attributable to an increase in academic staff and 26.8% of which occurred between 2012–13 and 2013–14. Despite these increases in the number of academic staff over the period, however, student:staff ratios remain at a similar level to 2004–05, at 16.0 to 1 compared to 16.6 in 2004–05. This reflects the increased student numbers over the period.

FIGURE 27

Staff by employment function, 2004–05 to 2013–14



Source: HESA Staff record

The number of academic staff varies according to subject area. In 2013–14 there were considerable increases in some subject areas, which may be a result of staff being taken on before the census date for the 2014 Research Excellence Framework. However, the proportions of staff working in each area did not change substantially. It remained the case that more staff were employed in medicine and dentistry than in any other subject area, followed by two of the largest subject groups for students: administrative, business and social studies; and biological, mathematical and physical sciences.¹³

More staff were employed in medicine and dentistry than in any other subject area.

12 This figure, and the rest of the analysis in this section, is for staff on open-ended or permanent contracts and fixed-term contracts unless otherwise stated. In addition to these staff, there were 106,880 ‘atypical’ staff employed in 2013–14.

13 Because of changes in definitions, this data is not directly comparable before 2012–13.

TABLE 5

Number of academic staff by cost centre, 2013–14

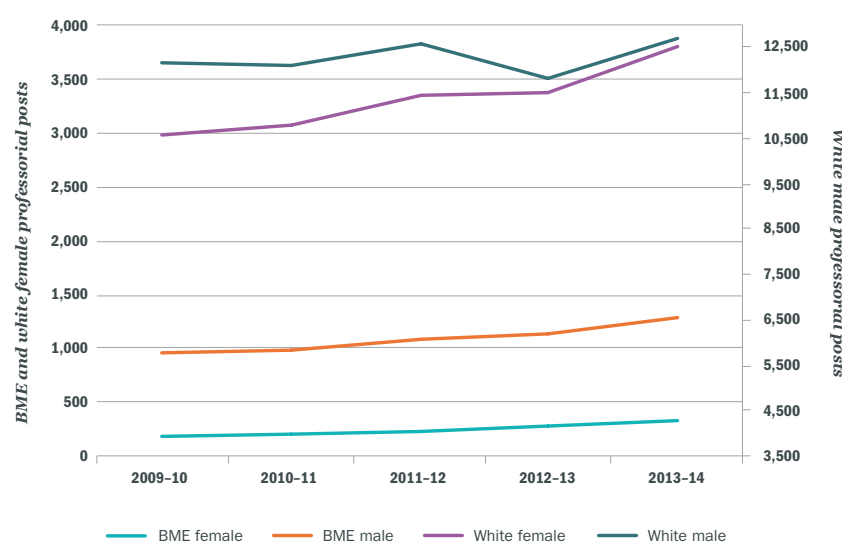
	2012-13	2013-14	CHANGE		% CHANGE	% OF TOTAL
MEDICINE, DENTISTRY & HEALTH	44,905	46,655	1,750		3.9%	24.4%
ADMINISTRATIVE, BUSINESS & SOCIAL STUDIES	36,695	38,755	2,060		5.6%	20.3%
BIOLOGICAL, MATHEMATICAL & PHYSICAL SCIENCES	28,025	30,255	2,230		8.0%	15.8%
ENGINEERING & TECHNOLOGY	21,440	22,470	1,030		4.8%	11.8%
HUMANITIES & LANGUAGE BASED STUDIES & ARCHAEOLOGY	17,025	17,560	535		3.1%	9.2%
DESIGN, CREATIVE & PERFORMING ARTS	15,245	16,240	995		6.5%	8.5%
EDUCATION	12,775	13,040	265		2.1%	6.8%
ARCHITECTURE & PLANNING	3,760	3,870	110		2.9%	2.0%
AGRICULTURE, FORESTRY & VETERINARY SCIENCE	2,260	2,335	75		3.3%	1.2%

Source: HESA Staff record

As is the case with students, academic staff numbers also vary according to background. In 2013–14 72.8% of academic staff were from the UK, 15.5% were from the EU excluding the UK and 11.7% were from outside the EU; 44.6% were women and 55.4% were men; and 86.6% were white and 13.4% were BME.¹⁴ Higher education providers in the UK are working to increase the diversity of their staff population with measures like the Athena SWAN Charter mark, the ECU’s new gender and race equality charter marks, and schemes like B-MEntor and StellarHE.¹⁵ However, as Figure 28 shows, while some improvements have been made to the diversity of those in professorial posts (the number of BME female professors has increased by 75% between 2009–10 and 2013–14, for example, though this was from a very low base), the majority of professors are white men, with white women representing just 20.9% and black and minority ethnic men and women only 7.1% and 1.8% respectively.

FIGURE 28

Professorial posts by gender and ethnicity, 2009–10 to 2013–14



Source: HESA Staff record

¹⁴ Percentages are of those staff with known nationality and ethnicity.

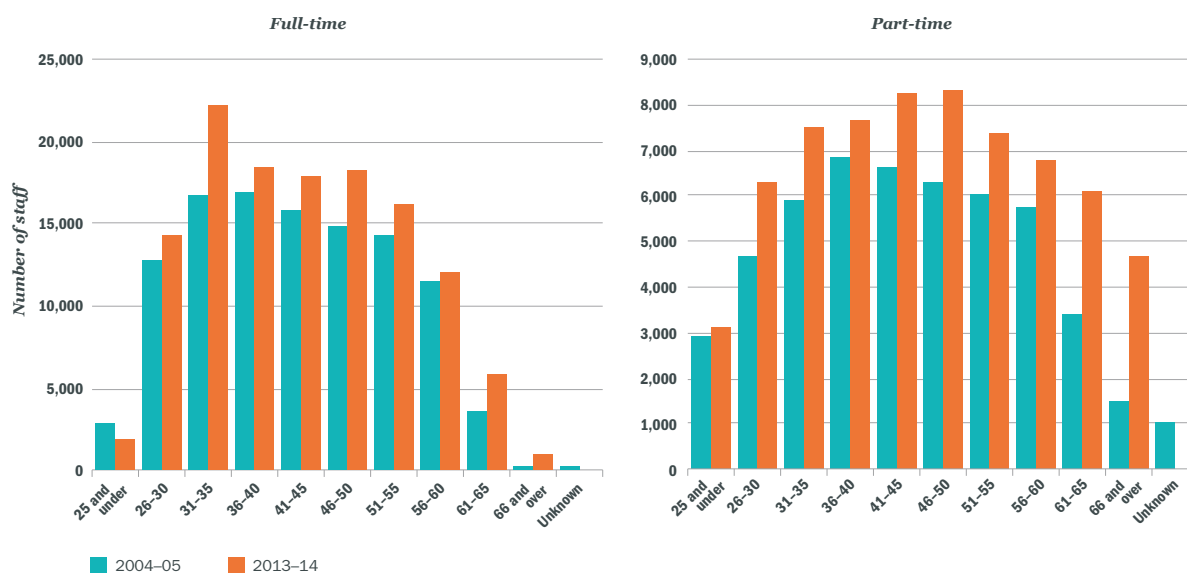
¹⁵ See <http://blogs.lse.ac.uk/diversity/2013/07/b-mentor-mentoring-scheme-for-academic-and-research-staff> and <http://diversitypractice.co.uk/events/stellar-he-events>

One of the biggest changes in staffing during the period is the growing number of older staff and staff working part time, mimicking changes in the wider workforce. This can be seen in Figure 29, which shows growing numbers of full- and part-time staff in all age groups (bar a decline in full-time staff under 25), but which shows particular growth in full- and part-time staff over 60 and in part-time staff at the start of their careers.

Full-time staff aged 66 and over increased by 320.4% between 2004–05 and 2013–14, with part-time staff in the same group increasing by 203.8% (these are both from very low bases). At the same time part-time staff aged 26–30 and 31–35 increased by 35.8% and 28.2% respectively (although dwarfed by the increases in over-60s, these are among the highest increases in other age groups through the period). Over the period these changes meant that the proportion of academic staff working part time grew from 31.7% to 34.0% and the proportion of staff aged over 60 rose from 5.4% to 9.0%.

FIGURE 29

Change in age profile of academic staff by mode of employment between 2004–05 and 2013–14



Source: HESA staff record

CHAPTER 3

FINANCE

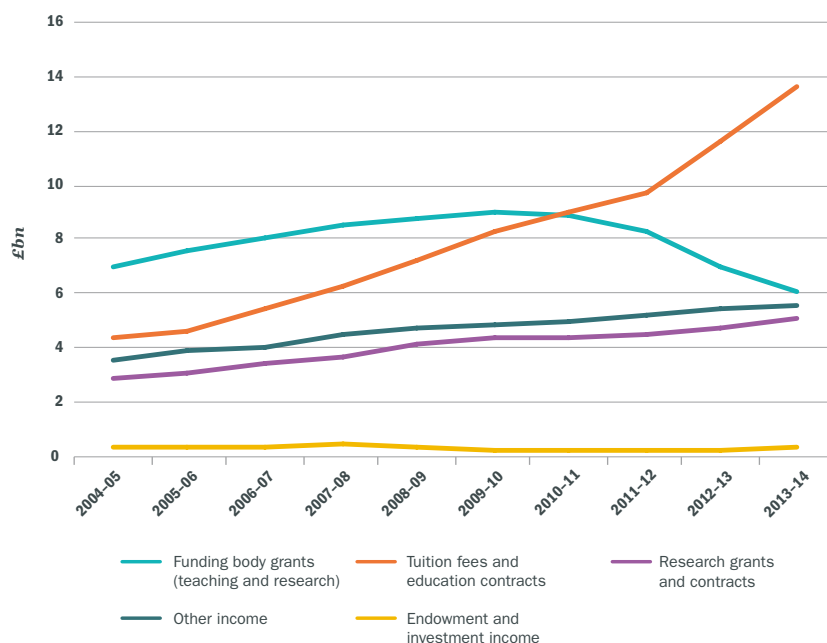


In 2013–14 the total income of the UK higher education sector was £30.7 billion, up from £18.0 billion in 2004–05.

In 2013–14 tuition fees and education contracts made up 44.5% (£13.7 billion) of income, funding body grants 19.8% (£6.1 billion) and research grants and contracts 16.5% (£5.1 billion). These proportions have changed significantly over the period as undergraduate funding reforms took effect (funding body grants were 38.7% of income and tuition fees and education contracts were 24.1% of income in 2004–05). The sharp growth in tuition fee income from 2012–13 and fall in funding body grants is clearly shown in Figure 30.

FIGURE 30

Income by source, 2004–05 to 2013–14



Source: HESA Finance record

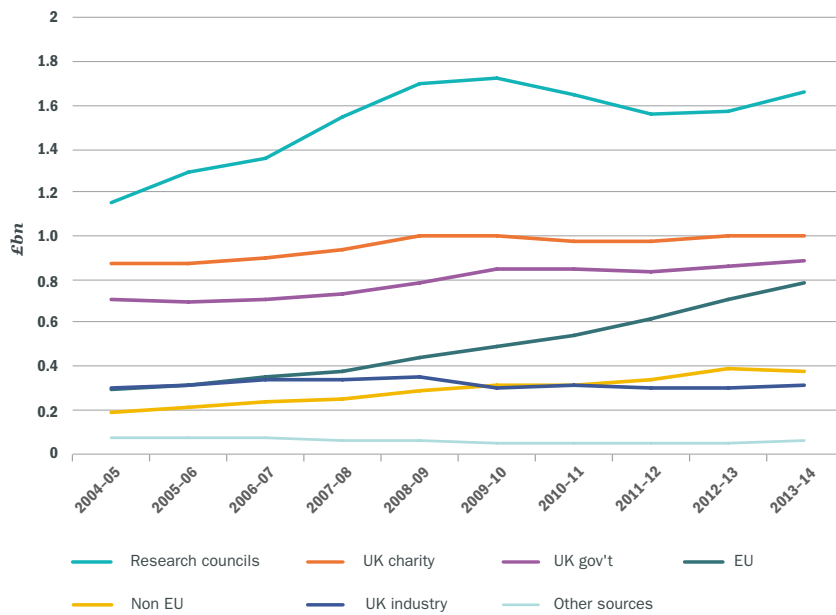
Another element of income which has clearly grown over the period is research income. This is examined in Figure 31, which shows the 169.2% rise in research income from the EU (at £0.8 billion in 2013–14) and the decline in income from the research councils between 2009–10 and 2011–12. Although income from the research councils rose in 2013–14 it remains lower than in 2009–10).

Providers have also been able to increase their income from knowledge exchange activity, with a real-terms increase of 52.0% in overall income over the ten-year period. This has largely been driven by a significant rise in income from contract and collaborative research. The highest percentage increase, 101.7%, came from continuing professional development and continuing education for individuals which, along with income from facilities and equipment, has increased steadily over the past ten years. Income from regeneration and development programmes has declined significantly since the abolition of Regional Development Agencies in England in 2010, but has started to recover as universities become more closely engaged in projects funded through the European Structural and Investment Funds. Universities and colleges across the UK now gain £3.9 billion from sharing their ideas, expertise and resources with research users and the wider community, up from £2.6 billion in 2004–05.

Universities and colleges across the UK now gain £3.9 billion from sharing their ideas, expertise and resources with research users and the wider community, up from £2.6 billion in 2004–05.

FIGURE 31

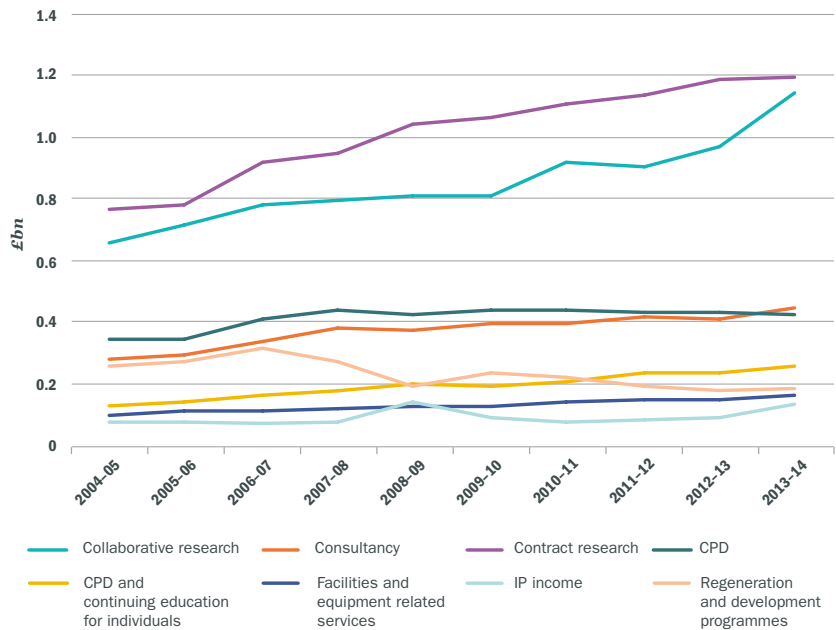
Research income by source, 2004–05 to 2013–14 (real terms)



Source: HESA Finance record and BIS GDP deflators series, March 2015

FIGURE 32

Knowledge exchange income of UK universities by type of activity, 2004–05 to 2013–14 (real terms)



Source: HEFCE HE-BCI

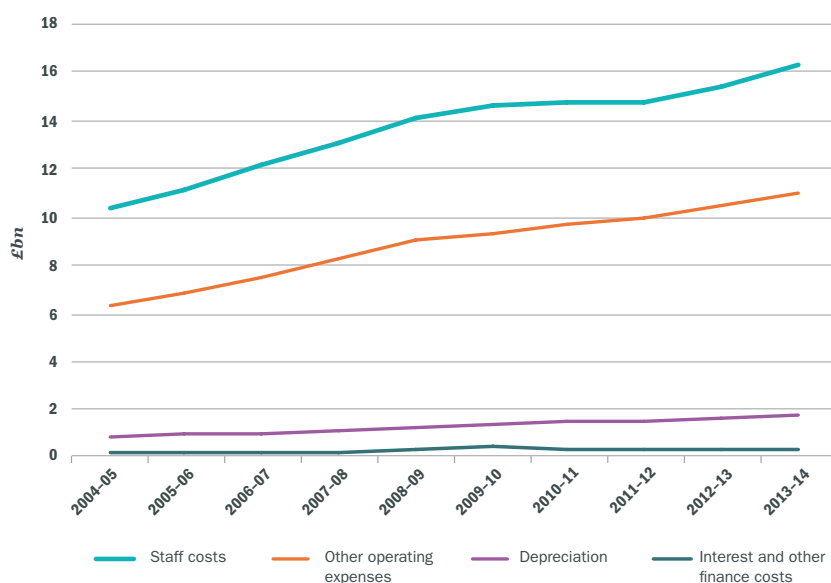
This sector-level analysis hides differences at a country level, however. In 2012–13 the reforms to undergraduate funding in England led to a divergence in the finances of higher education providers in the four UK nations, building on differences which had been growing since Northern Irish, Scottish and Welsh devolution in 1998.

As England is such a large part of the sector, the patterns in total sector income over the period largely reflect those seen by English providers. The changes in total income in the other UK nations have been lower, and in the case of Northern Ireland income actually fell between 2009–10 and 2012–13. Although income did rise in Northern Ireland in the final year of the period, more recent decisions by the Department for Employment and Learning to cut the government subsidy to universities means this is unlikely to continue.¹⁶

Expenditure has also risen across the whole UK sector, from £17.8 billion in 2004–05 to £29.4 billion in 2013–14 (Figure 33). The majority of this (55.4%) went on staff costs, followed by other operating expenses (eg maintenance contracts, equipment, etc). Despite the rise in total staff numbers the proportion of expenditure spent on staff has fallen from 58.4% in 2004–05 to 55.4% in 2013–14, partly as a result of pay restraint (uplift to the single university pay scale over the last five years of the period has been considerably below inflation, with 5.4% uplift against 17.2% inflation).¹⁷ The proportions made up from other operating costs and depreciation have both risen over the period.

FIGURE 33

Expenditure of higher education providers, 2004–05 to 2013–14



Source: HESA Finance record

These rises reflect the investment providers have been making over recent years in their estates. In 2004–05, providers spent £2.4 billion on acquiring or improving equipment and buildings, and by 2013–14 this had risen to £3.9 billion, an increase of 60.4%. The increasing need for capital expenditure comes at the same time as increasing uncertainty for many providers about future income and their ability to cover necessary expenditure. Whereas under the previous funding system for teaching, funding body

In 2004–05, providers spent £2.4 billion on acquiring or improving equipment and buildings, and by 2013–14 this had risen to £3.9 billion.

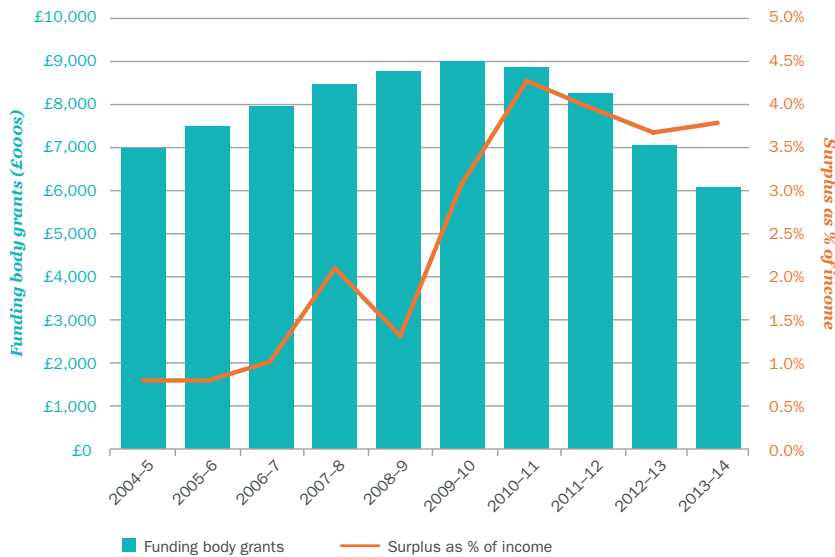
16 See www.delni.gov.uk/consultations/del-draft-budget-2015-16

17 Universities UK (2015) *Efficiency, effectiveness and value for money*

grants represented a relatively reliable source of income for providers, tuition fee income is dependent on a number of factors and will change with student intakes each year. Given that the 18-year-old population in the UK and EU is falling, that there is continuing uncertainty about international student recruitment to the UK, and that there is increasing competition between different providers (and different UK countries) for students, providers are unable to predict their main income source in the same way as previously.

This has led many providers to build up internal funds to ensure that they are able to finance both ongoing day-to-day expenditure (eg on staff) and necessary capital projects without going into the red, even if their income one year is lower than expected. Between 2004–05 and 2013–14 surplus as a percentage of income across the sector rose from 0.8% to 3.8%; in the same period funding body grants fell by 12.8% (Figure 34).

FIGURE 34
Funding body grants and provider surplus as a percentage of income, 2004–05 to 2013–14



Source: HESA Finance record

CONCLUSION



The UK higher education sector has changed in size and shape over the past decade. The overall trajectory from 2004–05 is one of growth, but with that growth tailing off after 2010–11. As higher education providers moved into a more uncertain world they began to diversify their income, reduce costs, and build up margins for reinvestment.

FIGURE 35

Annual percentage change in students, staff and income, 2004–05 to 2013–14



Source: HESA Student, Staff and Finance records

Despite the challenges of a dynamic and sometimes uncertain operating environment, the UK higher education sector can point to a number of successes over the period:

- Researchers based at UK universities received the most funding of any country’s university sector under the EU’s FP7 research programme: €4.9 billion between 2007 and 2013 (70% of all funding to higher education under the programme).¹⁸ Combined with the results of the 2014 Research Excellence Framework, which judged that over three quarters of the work submitted in 2013–14 was world-leading or internationally excellent,¹⁹ this shows the strength of the research carried out in the UK’s universities.
- Student satisfaction has increased over the period, from 80% in 2005 to a new high of 86% at the end of the period in summer 2014.
- Between 2005–06 and 2013–14 it is estimated that UK universities delivered £2.38 billion of efficiency savings. That is made up of £1.38 billion for the 2004 and 2007 Comprehensive Spending Review periods, and £1 billion for the first three years of the 2010 Spending Review.²⁰

Student satisfaction has increased from 80% in 2005 to a new high of 86% in summer 2014.

Many overseas governments are continuing to finance and implement bold strategies to develop their countries’ higher education sectors and their position on the global stage. In this increasingly competitive international environment and with a referendum on remaining in the EU taking place before the end of 2017, the UK higher education sector will continue to work hard to maintain its position and attract the staff, students, funding and partnerships that are central to its success.

¹⁸ European Commission (2015) *Seventh FP7 Monitoring Report*

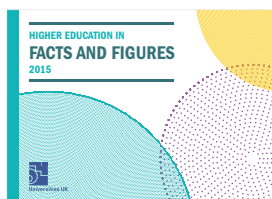
¹⁹ HEFCE Research Excellence Framework 2014

²⁰ Universities UK (2015) *Efficiency, effectiveness and value for money*

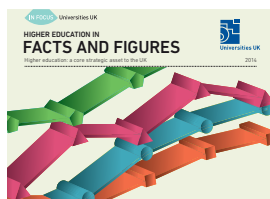
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