

Research report

Variable tuition fees in England: assessing their impact on students and higher education institutions

A fourth report



Universities UK

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This report has been prepared for Universities UK by Nigel Brown and Brian Ramsden.

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This is the fourth annual report on the effects of the introduction of variable fees arrangements for UK and EU-domiciled full-time undergraduates attending higher education institutions in England.

This report, like its predecessors, brings together a range of information from publicly accessible sources and the institutions themselves about the demand for higher education, the nature of the student body, the fees and bursary arrangements and the financial situation of institutions.

Although it is primarily concerned with full-time undergraduate students, it also seeks to provide information for measuring any impact of the changes to full-time undergraduate fees on the fees and demand for part-time higher education. While the major focus of this work relates to England, some statistics have also been presented for the other countries of the United Kingdom, in order to provide a basis for comparative analysis.

This report provides information on the impact of fees on student enrolments in the second year (2007/08) in which variable fees for full-time undergraduate students in England applied.

October 2009

This is the fourth report prepared for Universities UK assessing the impact of the introduction of variable tuition fees for full-time undergraduate higher education in England from 2006/07. As in the three previous reports we have relied on publicly available data, in particular from:

- Universities and Colleges Admissions Service (UCAS) on applicants, acceptances and application rates;
- Higher Education Statistics Agency (HESA) on enrolments and institutional income;
- Office for Fair Access (OFFA) on expenditure on student bursaries;
- Student Loans Company on the take-up of fee loans.

The key findings in this report are:

- an increase in applicants through UCAS for full-time undergraduate study in 2009 of 7.4 per cent for the UK and 7.7 per cent for England;
- an increase in applicants per thousand of the 17-year-old population from 471 to 517 for the UK;
- an increase of 13.8 per cent in applicants from the EU and 9 per cent from the rest of the world;
- a median increase of 7.1 per cent in applications to institutions receiving more than 300 applicants for degree programmes;
- an overall increase in the number and percentage of acceptances from minority ethnic groups since 2004;
- a comparative reduction in 2008 in the proportions of acceptances among the higher socio-economic groupings, balanced by an increase in the proportions among the semi-routine and routine occupations;
- an increase in the proportion of older students accepted onto full-time undergraduate programmes;
- although UK-domiciled full-time undergraduate entrants declined in 2006/07, the numbers have now returned to approximately the same level as in 2005/06;
- a decline in part-time undergraduate enrolments in 2007/08;
- a significant increase in the proportion of Welsh-domiciled students choosing to study in Wales between 2005/06 and 2006/07;

- there is no evidence that the introduction of variable fees has had any impact on student subject choices;
- almost all higher education institutions deciding to charge the maximum statutory fee of £3,225 in 2009/10 and broadly to maintain their current bursary and scholarship systems;
- there is no evidence from the applications data that the maximum level of bursary has had any influence on the application rate to individual institutions;
- a continuing rise in real terms in part-time undergraduate fees;
- a take-up of fee loans of between 80-82 per cent of English-domiciled students paying the variable tuition fee from 2006/07.

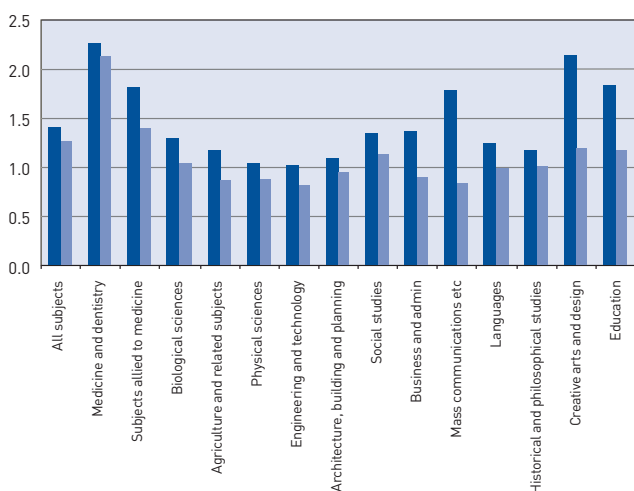
Overall there is nothing in the available data that indicates that the introduction of variable fees in England has yet had any lasting impact on the level or pattern of demand for full-time undergraduate education. It was only in 2008 that there was the first evidence of a decline in demand for part-time undergraduate education despite the decision by many institutions substantially to increase part-time undergraduate fees from 2005/06.

1 The demand for higher education

- 1 A major purpose of this series of publications is to identify the extent to which – if at all – the demand for full-time higher education at undergraduate level in England has been affected by the introduction of variable fees. The publications have also focused on the potential effect of full-time variable fees on part-time undergraduate demand.
- 2 There are three contextual issues here. The first is that the balance between supply and demand has narrowed substantially during the last 12 years. So, for example, while the number of applicants for full-time undergraduate places through the Universities and Colleges Applications System (UCAS)¹ has increased, the proportion of applicants being accepted has increased more. There is considerable variability by subject here. The following chart shows the ratio of UK-domiciled applicants to acceptances through the UCAS system for 1995 entry and 2007 entry. It will be very interesting to see if the economic downturn has any impact on the relationship between the numbers of applicants and acceptances.

Chart 1

Ratio of UK-domiciled applicants to acceptances through UCAS, 1995 and 2007



- 3 Although there have been some changes in the definition of subject areas over this 13-year period from 1995, it is nonetheless the case that:
 - in every comparable subject area, the ratio of applicants to acceptances has diminished (overall from 1.4:1 to 1.2:1);

- the sharpest reductions in the ratios of applicants to acceptances have been in three subject areas – mass communication and documentation, creative arts and design, and education. The pattern of change for these subjects which had among the highest ratios of applications to acceptances in 1995 demonstrates a classic market response by institutions;
 - the ratio has fallen less sharply in medicine and dentistry and in subjects allied to medicine, where there is a significant degree of central control on the places available;
 - only medicine now has a ratio in excess of 1.5:1 and several subjects have a ratio of less than 1:1 – supply, in other words, outstrips demand. This is especially noteworthy in physical sciences and in engineering and technology where the ratio was already close to 1:1 in 1995. In these subjects there continue to be concerns about departmental closures, often fuelled by the lack of demand for undergraduate places. However, several measures have been put in place to tackle lack of demand in subjects which are considered to be of strategic importance.
- 4 It is impossible to predict whether there would be a natural further development of this trend in future years, irrespective of the introduction of variable fees.
 - 5 The second contextual issue is related, but slightly different. The demand for higher education is contingent partly upon the number of individuals within the population (and we are concerned particularly with the population of the UK here) who might benefit from higher education. This depends both on the underlying demographic trends and in particular on the output of qualified leavers from secondary education. Demographic trends for the relevant population group (17- to 20-year-olds) have been largely positive in recent years whereas the proportion of the population obtaining two or more A-levels or equivalent has remained broadly static since 2000.²
 - 6 The third issue is that while UCAS provides an enormous amount of valuable information about applicants, there is a significant minority of applicants who fall outside this system. The full-time undergraduate students who are omitted from the UCAS entrant data are those who are admitted following direct application to a university. It is understood that these students constitute, in any recent year, some 11 per cent of full-time undergraduate entrants. Analysis reported elsewhere³ suggests that they have significantly different characteristics from UCAS entrants, for example:

- they are concentrated in the post-1992 universities (especially in the major conurbations);
- they include a significantly higher proportion of minority ethnic groups than the undergraduate population as a whole; and
- they are, on average, older than students who enter through UCAS.

Applications to full-time courses through UCAS

- 7 UCAS publishes an extensive range of statistics, which in our previous reports enabled us to set out a baseline for subsequent analysis of the demand for full-time undergraduate education.
- 8 In the following paragraphs, we set out information about entry to higher education in each of the six years 2004–2009. With six years' data we can explore the extent to which individuals may have been influenced in their planning by their perceptions of the new variable fee arrangements, for example by deferring entry.

Applicants to undergraduate programmes

- 9 The number of applicants by domicile are summarised in the following table.

Table 1
Applicants for full-time undergraduate study in the UK through UCAS by domicile, 2004–2009, as at 15 January

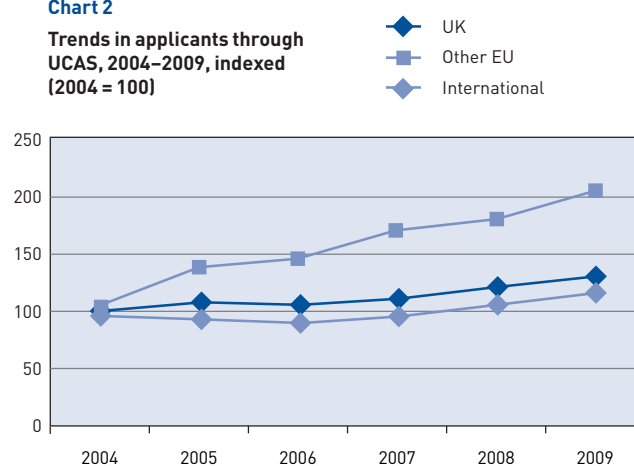
Year	England	Wales	Scotland	Northern Ireland	UK sub-total	Other EU	International	Total
2009	345,106	18,328	29,549	15,939	408,922	26,728	28,517	464,167
2008	320,469	16,946	28,108	15,302	380,825	23,493	26,171	430,489
2007	291,075	16,110	27,032	15,446	349,663	22,074	23,570	395,307
2006	271,663	16,123	26,804	15,930	330,520	19,058	22,105	371,683
2005	284,359	15,798	27,404	16,075	343,636	17,892	23,096	384,624
2004	259,198	14,666	26,522	15,173	315,559	13,224	24,388	353,171
Percentage change 2008 to 2009	7.7%	8.2%	5.1%	4.2%	7.4%	13.8%	9.0%	7.8%
Percentage change 2007 to 2009	18.6%	13.8%	9.3%	3.2%	16.9%	21.1%	21.0%	17.4%
Percentage change 2006 to 2009	27.0%	13.7%	10.2%	0.1%	23.7%	40.2%	29.0%	24.9%
Percentage change 2005 to 2009	21.4%	16.0%	7.8%	-0.8%	19.0%	49.4%	23.5%	20.7%
Percentage change 2004 to 2009	33.1%	25.0%	11.4%	5.0%	29.6%	102.1%	16.9%	31.4%

Source: UCAS

- 10 Overall, we see an increase of 7.8 per cent in applicant numbers in the last year, and over 30 per cent in the six-year period under review. The annual changes in numbers of applicants from the UK, other EU countries and countries outside Europe have varied considerably across the six years, as chart 2 shows.

Chart 2

Trends in applicants through UCAS, 2004–2009, indexed (2004 = 100)



Source: UCAS

- 11** UK applicant numbers declined in real terms between 2005 and 2006, following a marked increase between 2004 and 2005. They increased again in each subsequent year, especially in England, and that trend has continued in 2009.
- 12** Among UK applicants, the greatest increases are seen among English and Welsh applicants, although applicants from Northern Ireland have now recovered from the reverses of the previous two years noted in our earlier reports.
- 13** Since 2004 there has been a consistent annual increase in applicants from other EU countries, arising partly from the enlargement of the EU in that year. That increase continues in the most recent year, in which other EU students show the largest percentage increase, almost 14 per cent. The enlargement of the EU had a compensatory negative impact on enrolment from countries outside the EU, but that effect has now been reversed.
- 14** In our last report we noted a downturn in applicants from the Republic of Ireland. That has now been reversed: there is a 13 per cent increase in applicants from the Republic, who now number 4,871. China shows a further increase of 7.5 per cent and is the second highest provider of overseas applicants to undergraduate courses. The largest percentage increases are from the two newest EU accession countries, Bulgaria and Romania, both of which show increases of over 50 per cent. A more detailed analysis is contained in Appendix 1.
- 15** While 15 January is an important deadline within the applications cycle, many applications are received after that date. It is to be expected that, at times of comparative turbulence in the economy and within the higher education system itself, the number of late applications may increase.
- 16** Absolute numbers of applicants are, however, less meaningful than figures adjusted by the overall relevant population. In our last report we presented a detailed analysis of the relationship between the numbers of applicants and the young population of the constituent countries of the UK and this is now repeated with the figures for 2009 applications included.

Table 2
Relationship between applicants and the 17-year-old population, 2004–2009

	England	Wales	Scotland	Northern Ireland	UK
Population aged 17 (thousands)					
2004 (estimated)	647.9	39.4	65.4	27.2	779.9
2005 (estimated)	667.9	40.2	66.1	27.1	801.3
2006 (estimated)	661.2	40.1	64.2	25.7	791.2
2007 (projected)	666.7	39.8	64.4	26.4	797.3
2008 (projected)	675.3	40.7	66.1	26.5	808.6
2009 (projected)	662.4	40.2	65.8	26.1	794.6
Applicants (thousands)					
2004	259.2	14.7	26.5	15.2	315.6
2005	284.4	15.8	27.4	16.1	343.6
2006	271.7	16.1	26.8	15.9	330.5
2007	291.1	16.1	27.0	15.4	349.7
2008	320.5	16.9	28.1	15.3	380.8
2009	345.1	18.3	29.5	15.9	410.9
Applicants per thousand of 17-year-old population					
2004	400	372	406	558	405
2005	426	393	415	593	429
2006	411	402	417	621	418
2007	437	405	420	585	439
2008	475	417	425	577	471
2009	521	455	449	610	517
Year on year change in applicants per thousand of 17-year-old population					
Percentage change 2004-2005	6.4%	5.3%	2.3%	6.3%	6.0%
Percentage change 2005-2006	-3.5%	2.2%	0.7%	4.1%	-2.6%
Percentage change 2006-2007	6.3%	0.8%	0.4%	-5.7%	5.0%
Percentage change 2007-2008	8.7%	2.6%	1.4%	-1.0%	7.4%
Percentage change 2008-2009	9.8%	9.6%	5.5%	5.5%	9.3%
Overall change in applicants per thousand of 17-year-old population, 2004–2009					
Percentage change 2004-2009	30.2%	22.0%	10.6%	9.0%	27.2%

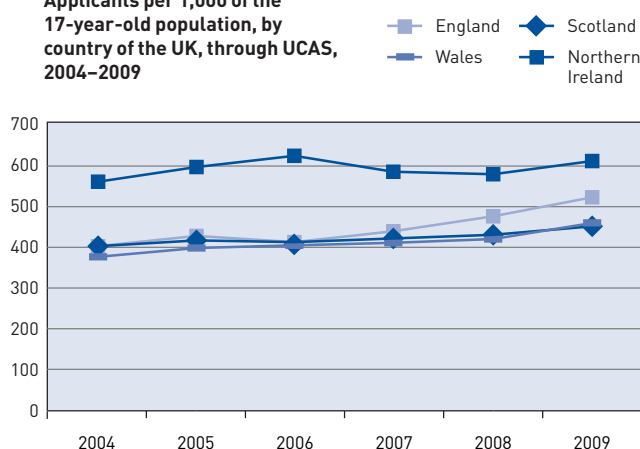
17 Table 2 shows that the number of applicants per thousand of the 17-year-old population has increased over the last six years in all of the constituent countries of the United Kingdom. This has been most marked in England, where it has increased from 400 to 521 applicants per thousand of the 17-year-old population – an overall increase of 30 per cent. The other three countries have seen smaller increases, with Scotland showing the lowest ratio of applicants per thousand of the relevant population in the latest year.

18 As we have noted previously, however, the increase in the rate of applications among English-domiciled applicants was reversed in the one year 2006 (the first year of variable fees) and this reverse was not reflected in the other countries of the United Kingdom. Northern Ireland, on the other hand, saw a decline from a significantly higher base than the other countries, in both 2007 and 2008, although this decline has been reversed in 2009.

19 The figures in table 2 are illustrated in Chart 3.

Chart 3

Applicants per 1,000 of the 17-year-old population, by country of the UK, through UCAS, 2004–2009



20 The steepest gradient of increase over the six years in question is within England, which has shown a marked rise in each of the years except 2006.

21 We were asked this year to see if there was any evidence of the impact of the current economic recession on demand. The applications data shows that the largest year on year increase in the applicant numbers to the population at age 17 across all four countries of the UK was between 2008 and 2009, when the 17-year-old population actually declined. This suggests that the threat of reduced employment prospects has encouraged more people to apply for higher education.

22 However, there is a further issue which needs to be noted here. The above tables and charts have related the applicant numbers to the population at age 17 – that is, the conventional year of application to full-time degree courses. However, in the most recent year, while UK applicants aged 20 and under have increased by a little over 6 per cent, those aged over 20 have increased by more than 12 per cent: table 3 shows the detailed figures. This suggests that the biggest impact of the recession on applicants to higher education may be among those qualified to enter higher education at the age of 18 but who in previous years chose to enter employment immediately; more of this group may now see a higher education qualification as improving their employment prospects.

Table 3

Applicants by age and declared area of permanent residence, 2008–2009

		UK	Other EU	Non-EU	Total
20 years and under	2009	339,117	21,789	23,076	383,982
	2008	318,922	18,868	21,029	358,819
Percentage change		6.3%	15.5%	9.7%	7.0%
21–24 years	2009	34,586	3,822	3,636	42,044
	2008	30,634	3,497	3,321	37,452
Percentage change		12.9%	9.3%	9.5%	12.3%
25 years and over	2009	35,219	1,117	1,805	38,141
	2008	31,269	1,128	1,821	34,218
Percentage change		12.6%	-1.0%	-0.9%	11.5%
Total	2009	408,922	26,728	28,517	464,167
	2008	380,825	23,493	26,171	430,489
% change		7.4%	13.8%	9.0%	7.8%

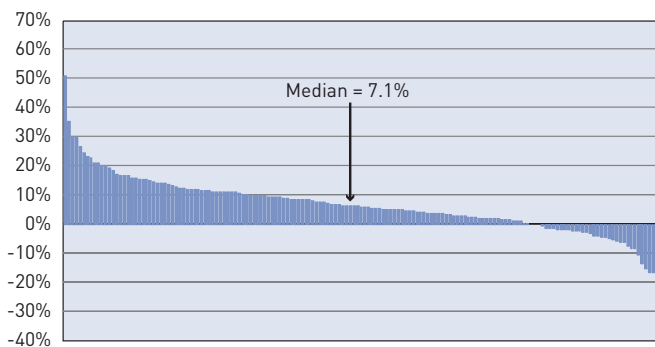
Applications to institutions

23 The previous paragraphs have been concerned with the numbers of **applicants** to full-time undergraduate courses. We now turn to a different measure, which is the number of **applications to institutions**. In our last report, we showed the spread of applications (rather than applicants) for full-time undergraduate courses by institution. We also compared those with earlier years, using an adjustment factor to compensate for a change in the UCAS application rules on the maximum number of choices available to each applicant.⁴

24 In the most recent two years, we can make straightforward comparisons. The distribution of change across the institutions with at least 300 applications for first degree courses (the basis on which comparisons have been made in our earlier reports) is plotted in chart 4.

Chart 4

Percentage change in number of applications to full-time degree courses through UCAS, 2008 - 2009 entry (January application figures)



25 Overall, the institutions which have at least 300 applications to first degree courses have seen an increase of approximately 7 per cent between 2008 and 2009, but within a wide range.

26 More than three quarters of the institutions have seen an actual increase in applications, although the remainder have seen a decrease amounting to over 10 per cent in some instances.

27 Overall, the admissions system operated by UCAS continues to show a significant growth in demand.

- 28** The UCAS database also includes data of particular relevance to the possible impact of variable full-time undergraduate fees on widening participation. This includes data on ethnicity, socio-economic grouping and age.
- 29** The Higher Education Statistics Agency (HESA) data on students also includes ethnicity and socio-economic grouping, although the latter is often derived unchanged from – and is limited to – the data that passes from UCAS to institutions when students are accepted. We have therefore chosen to present data on the ethnicity and socio-economic groupings for acceptances of English-domiciled applicants.
- 30** In our earlier reports we presented data under these heads for each of the five years up to 2007. In the following paragraphs, we update this information by showing the changes between 2004 and 2008 in order to identify any changes in overall trends.
- 32** The figures show an overall increase in the number and percentage of acceptances from minority ethnic groups over the five-year period. Over that period UK-domiciled ethnic minority acceptances have increased from 20.5 per cent to 22.6 per cent of all degree acceptances for whom relevant data are available. In the most recent three years the figures have been largely stable as has the proportion of unknowns. In the context of the introduction of variable fees in 2006/07, it may be relevant that practically the whole reduction in the proportion of acceptances onto first degree programmes of white individuals was between 2005 and 2006. Their decisions as to whether or when to enter higher education may have been more affected by concerns about the new fee and loan arrangements than those from other ethnic groups.

Ethnicity

- 31** Table 4 shows the distribution by ethnicity of acceptances onto full-time undergraduate programmes through UCAS for the years 2004–2008.

Table 4

Acceptances onto degree courses through UCAS, by ethnicity, 2004–2008

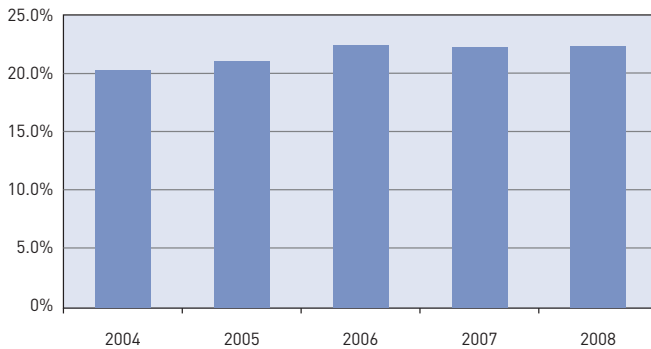
Ethnic origin	2004		2005		2006		2007		2008	
	Number	Percentage of total (1)	Number	Percentage of total (1)	Number	Percentage of total (1)	Number	Percentage of total (1)	Number	Percentage of total (1)
Asian Bangladeshi	2,715	1.0%	2,794	1.0%	3,040	1.1%	3,134	1.1%	3,588	1.1%
Asian Chinese	3,031	1.2%	2,998	1.0%	2,935	1.1%	3,104	1.1%	3,233	1.0%
Asian Indian	13,413	5.2%	14,001	4.9%	13,802	5.1%	13,553	4.7%	13,988	4.3%
Asian Other	3,371	1.3%	3,899	1.4%	3,849	1.4%	4,062	1.4%	5,065	1.6%
Asian Pakistani	7,999	3.1%	8,390	2.9%	8,463	3.1%	8,728	3.0%	9,790	3.0%
Black African	8,201	3.2%	10,163	3.6%	10,750	3.9%	12,204	4.2%	15,412	4.8%
Black Caribbean	3,752	1.5%	4,400	1.5%	4,695	1.7%	4,948	1.7%	5,951	1.8%
Black Other	870	0.3%	1,083	0.4%	1,073	0.4%	1,121	0.4%	1,191	0.4%
Mixed Other Mixed	2,279	0.9%	2,869	1.0%	2,813	1.0%	3,184	1.1%	3,455	1.1%
Mixed White and Asian	2,307	0.9%	2,865	1.0%	2,737	1.0%	3,148	1.1%	3,547	1.1%
Mixed White and Black African	716	0.3%	862	0.3%	982	0.4%	1,093	0.4%	1,233	0.4%
Mixed White and Black Caribbean	1,633	0.6%	2,011	0.7%	2,102	0.8%	2,616	0.9%	3,165	1.0%
Other	2,645	1.0%	3,418	1.2%	3,401	1.2%	3,709	1.3%	3,727	1.1%
White	205,651	79.5%	226,300	79.1%	211,691	77.7%	225,497	77.7%	250,938	77.4%
Total (2)	258,583		286,053		272,333		290,101		324,283	
Unknown (3)	18,496	6.7%	15,745	5.2%	16,896	5.8%	16,858	5.5%	19,325	6.0%
Total (4)	277,079		301,798		289,229		306,959		343,608	
(1) Percentage of total excluding unknowns				(3) Percentage of total including unknowns						
(2) Excluding unknowns				(4) Including unknowns						

Source: UCAS

33 Chart 5 illustrates the change over time.

Chart 5

First degree acceptances of UK-domiciled minority ethnic individuals as a percentage of all UK-domiciled acceptances, 2004–2008



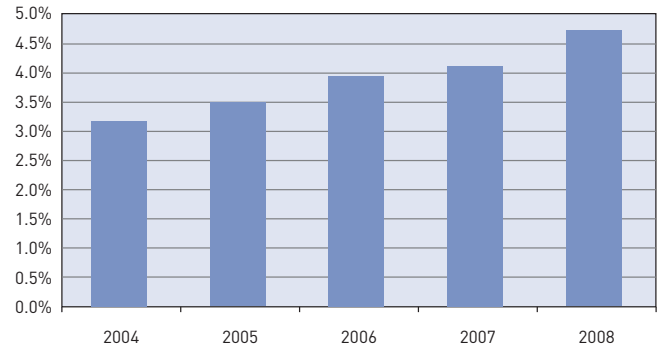
Source: UCAS

34 Within the figures, however, there are significant changes among individual minority ethnic groups.

35 Although they have increased in absolute terms, students of Asian ethnicities have generally fallen as a proportion of all acceptances. Conversely, entrants of black African ethnicity have increased both in absolute and relative terms. Factors affecting this increase may partly relate to an increase in the overall relevant population and also to the recent inclusion of applicants⁵ for nursing, midwifery and associated subjects within the UCAS system. The rate of increase in the proportion of total acceptances of black African ethnicity over the last five years is shown in chart 6.

Chart 6

UK-domiciled black African acceptances as a percentage of all UK-domiciled acceptances, 2004–2008



Source: UCAS

Socio-economic classifications

36 Table 5 sets out the accepted English applicants for full-time undergraduate programmes by socio-economic grouping over the last five years.

Table 5

Acceptances of English applicants for full-time undergraduate places by socio-economic group, 2004–2008

Socio-economic group	2004		2005		2006		2007		2008	
	Number	Percentage of total (1)	Number	Percentage of total (1)	Number	Percentage of total (1)	Number	Percentage of total (1)	Number	Percentage of total (1)
Higher managerial and professional occupations	50,866	22.8%	51,094	22.0%	48,529	22.7%	51,792	22.7%	51,963	20.5%
Lower managerial and professional occupations	70,497	31.6%	73,268	31.5%	66,823	31.2%	70,726	31.0%	74,718	29.4%
Intermediate occupations	33,517	15.0%	35,001	15.1%	30,649	14.3%	32,184	14.1%	37,030	14.6%
Small employer and own account workers	15,683	7.0%	16,550	7.1%	15,926	7.4%	17,065	7.5%	18,484	7.3%
Lower supervisory and technical occupations	10,507	4.7%	10,958	4.7%	10,030	4.7%	10,444	4.6%	10,978	4.3%
Semi-routine occupations	29,528	13.2%	32,556	14.0%	29,309	13.7%	32,154	14.1%	44,284	17.4%
Routine occupations	12,305	5.5%	13,088	5.6%	12,577	5.9%	13,431	5.9%	16,386	6.5%
Total (2)	222,903		232,515		213,843		227,796		253,843	
Unknown (3)	54,176	19.6%	69,283	23.0%	75,386	26.1%	79,163	25.8%	89,765	26.1%
Total (4)	277,079		301,798		289,229		306,959		343,608	
(1) Percentage of total excluding unknowns				(3) Percentage of total including unknowns						
(2) Excluding unknowns				(4) Including unknowns						

Source: UCAS

37 After a period of comparative stability the figures for the latest year show a comparative reduction in the proportions of acceptances among the higher socio-economic groupings, balanced by an increase in the proportions among the semi-routine and routine occupations. It is uncertain whether this change is explained by the incorporation of those accepted onto nursing, midwifery and associated programmes in the UCAS data. The proportion of unknowns continues to exceed 25 per cent, and is rising.

Age

38 Finally in this section we look again at the age of people entering full-time undergraduate higher education.

39 Table 6 provides the breakdown of acceptances of English applicants through UCAS for full-time undergraduate programmes by age range in the period 2004–2008.

Table 6

Acceptances of English applicants for full-time undergraduate places by age range, 2004–2008

Age range	2004		2005		2006		2007		2008	
	Number	Percentage of total (1)	Number	Percentage of total (1)	Number	Percentage of total (1)	Number	Percentage of total (1)	Number	Percentage of total (1)
20 and under	222,357	80.3%	242,834	80.5%	231,040	79.9%	245,120	79.9%	266,893	77.7%
21 to 24	26,543	9.6%	28,367	9.4%	27,971	9.7%	30,234	9.8%	36,307	10.6%
25–39	22,306	8.1%	23,971	7.9%	23,501	8.1%	24,484	8.0%	31,264	9.1%
40 and over	5,873	2.1%	6,626	2.2%	6,717	2.3%	7,121	2.3%	9,144	2.7%
Total	277,079	100.0%	301,798	100.0%	289,229	100.0%	306,959	100.0%	343,608	100.0%

Source: UCAS

40 Until the most recent year these figures showed stability in the distribution of acceptances onto full-time undergraduate programmes by age range. In the latest year, 2008, we see an increase in the proportion of older students. This is largely attributable to the inclusion of individuals accepted onto nursing and midwifery courses within the statistics: acceptances onto courses in subjects allied to medicine overall constituted 22 per cent of acceptances of students aged 21 and over in 2008 compared with 12 per cent of such acceptances in the previous year when applications and acceptances for nursing and midwifery courses were not included in the statistics.

Full-time and part-time enrolments

- 41** The Higher Education Statistics Agency (HESA) records the actual enrolments of students in higher education institutions. For this analysis only first-year students are considered since they provide the most up-to-date information about participation in higher education and are most comparable with UCAS data.
- 42** In our first two reports, we presented data about the actual enrolments in three consecutive years, 2003/04 to 2005/06, since they provided a baseline for consideration of the effects of the introduction of variable fees, and we were conscious that enrolments in any of those years could conceivably be influenced by the knowledge of the imminent introduction of variable fees.
- 43** In our third report, published in 2008, we presented the first analysis of entrants to undergraduate programmes following the introduction of variable fees in academic year 2006/07. That showed that the number of UK-domiciled entrants fell in 2006 even though the young age population was rising.
- 44** It is now possible to update this data, and to provide information about the number of full-time undergraduate entrants in 2007/08: this is summarised by domicile in table 7.

Table 7

Full-time first-year undergraduate students, 2003/04–2007/08 by domicile

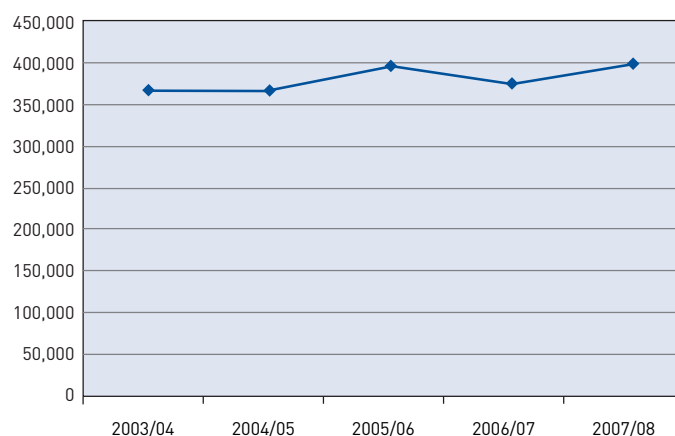
	2003/04	2004/05	2005/06	2006/07	2007/08
Full-time undergraduate entrants - UK	372,835	374,010	393,560	376,605	394,310
Full-time undergraduate entrants - EU	17,420	20,675	22,695	23,715	25,715
Full-time undergraduate entrants - non-EU	39,475	37,175	34,665	37,225	39,375

- 45** Table 7 shows that although UK-domiciled entrants declined in 2006/07, the numbers in 2007/08 have now returned to approximately the same level as in 2005/06. In the meantime the trend among students from other EU countries and from countries outside the EU continues to show growth. The full tables of enrolments on full-time and part-time enrolments over the last five years are in Appendix 2.

- 46** The figures for UK-domiciled students are illustrated in chart 7.

Chart 7

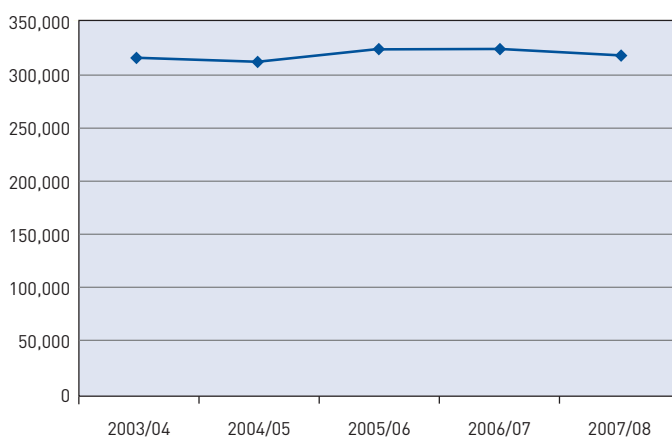
Full-time first-year UK-domiciled undergraduate students, 2003/04–2007/08



- 47** In previous years, we have also looked at the enrolments among part-time undergraduates in order to assess whether the introduction of variable fees had involved any change in the balance between full-time and part-time enrolments. (The detailed figures are incorporated into Appendix 2.)
- 48** Our conclusion last year was that there had been little if any effect on part-time enrolments. However the following chart, which shows the trend in part-time undergraduate enrolments over the last five years, suggests that there may have been a small effect.

Chart 8

Part-time first-year UK-domiciled undergraduate students, 2003/04–2007/08



- 49 The trend shown here in relation to part-time enrolments appears to mirror the trend for full-time enrolments, at least for the last two years. While enrolments to full-time programmes declined in 2006/07, those on part-time programmes held up strongly and whereas full-time enrolments returned to a strong position in 2007/08, part-time enrolments declined.
- 50 There is not enough evidence to suggest whether the two converse trends are causally related.
- 51 We address the issue of part-time student fees in section 4 of this report.

Cross-border flows

- 52 In our previous reports we have looked at the flows of students between the four countries of the United Kingdom since 2003/04 and the updated calculations are in Appendix 3.
- 53 In 2007/08, the flow of undergraduate students between the four countries is as shown in Table 8.

Table 8
Cross-border flows of full-time first-year UK-domiciled^a undergraduate students, 2007/08

Country of domicile	Country of institution				Total
	England	Wales	Scotland	Northern Ireland	
England	310,615	8,490	3,760	110	322,975
Wales	5,340	13,745	110	5	19,200
Scotland	1,810	55	30,590	15	32,470
Northern Ireland	2,840	95	1,100	9,465	13,500
Unknown	1,955	295	125	5	2,375
Total	322,560	22,680	35,685	9,600	390,525

- 54 These movements are expressed as percentages (of individuals by domicile) in table 9.

Table 9
Percentages of full-time first-year undergraduate students studying within their own country, 2007/08

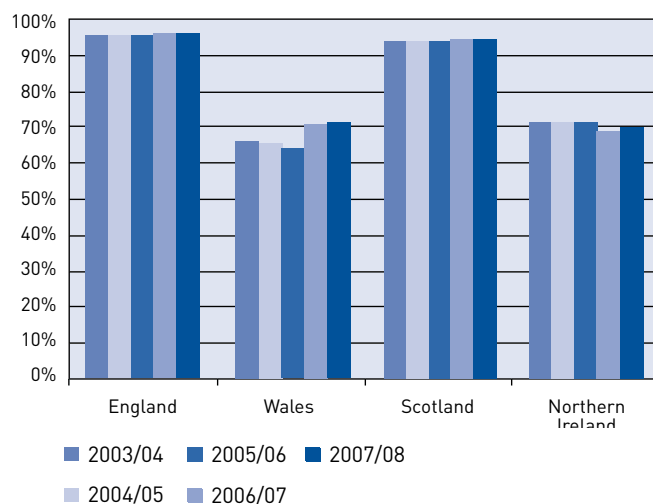
Country of domicile	Country of institution				Total
	England	Wales	Scotland	Northern Ireland	
England	96.2%	2.6%	1.2%	0.0%	100.0%
Wales	27.8%	71.6%	0.6%	0.0%	100.0%
Scotland	5.6%	0.2%	94.2%	0.0%	100.0%
Northern Ireland	21.0%	0.7%	8.2%	70.1%	100.0%
Total	82.6%	5.8%	9.1%	2.5%	100.0%

- 55 Compared with the previous year, students domiciled in England, Wales and Northern Ireland are all fractionally more likely to be studying within their own home countries. The differences are, however, very small. The change over time is illustrated in table 10 and chart 9.

Table 10
Percentage of first-year UK-domiciled undergraduates studying within their own country, 2003/04 to 2007/08

	2003/04	2004/05	2005/06	2006/07	2007/08
England	95.7%	95.7%	95.6%	96.0%	96.2%
Wales	66.5%	65.8%	64.3%	70.8%	71.6%
Scotland	94.0%	94.1%	94.1%	94.4%	94.2%
Northern Ireland	71.4%	71.1%	71.3%	69.2%	70.1%

Chart 9
Percentage of full-time first-year UK-domiciled students studying within their country of domicile, 2003/04 to 2007/08



- 56 The overall message from the data is that while there has been a small but slow increase in the proportion of English students studying within England, the only significant change over the five-year period has been in the proportion of Welsh students studying within Wales, where an underlying negative trend has been converted into a significant increase. This may be assumed to be a response to the changes in the fees arrangements in both Wales and England from 2006/07.

Enrolments by subject

57 This section analyses new full-time undergraduate students by principal subject of study for the last five years. We present the data at two levels. In table 11 we analyse the summary data by broad subject area (apart from the 'combined' subject group). Appendix 4 contains the more detailed analysis at principal subject level.

Table 11
First-year full-time undergraduate UK-domiciled student enrolments by subject area, 2003/04–2007/08

	2003/04	2004/05	2005/06	2006/07	2007/08	Percentage change 2003/04 to 2007/08	Percentage change 2006/07 to 2007/08
Medicine and dentistry	8,275	8,615	8,865	8,740	8,895	7.5%	1.8%
Subjects allied to medicine	49,175	51,595	53,095	48,750	46,480	-5.5%	-4.7%
Biological sciences	34,035	34,405	37,290	37,115	38,930	14.4%	4.9%
Veterinary science	705	740	745	795	835	18.4%	5.0%
Agriculture and related subjects	3,765	3,705	3,945	3,810	4,015	6.6%	5.4%
Physical sciences	15,225	14,880	16,480	16,105	16,995	11.6%	5.5%
Mathematical sciences	5,600	6,010	6,330	6,395	6,880	22.9%	7.6%
Computer science	25,600	21,545	20,385	18,905	18,370	-28.2%	-2.8%
Engineering and technology	20,840	20,700	20,890	20,295	21,395	2.7%	5.4%
Architecture, building and planning	7,440	7,855	9,690	9,665	10,310	38.6%	6.7%
Social studies	32,980	33,770	35,630	34,050	36,570	10.9%	7.4%
Law	16,090	16,680	16,570	15,690	16,970	5.5%	8.2%
Business and administrative studies	45,310	43,950	44,595	43,160	45,500	0.4%	5.4%
Mass communications and documentation	11,855	11,895	12,600	11,875	12,630	6.5%	6.4%
Languages	22,345	22,115	23,455	22,305	22,770	1.9%	2.1%
Historical and philosophical studies	16,755	16,010	17,845	16,515	16,700	-0.3%	1.1%
Creative arts and design	39,035	41,720	45,825	43,655	46,505	19.1%	6.5%
Education	14,010	15,270	16,620	16,755	21,380	52.6%	27.6%
Total (excluding combined)	369,040	371,460	390,855	374,580	392,130	6.3%	4.7%

58 Overall, a growth of more than 6 per cent is seen over the last five years, but with considerable variation across subject areas⁷:

- while computer science has declined by more than a quarter over the last five years, mathematics has increased by more than 20 per cent;
- subjects allied to medicine are now declining after a peak in 2005/06;
- the physical sciences and engineering and technology show stronger growth than the sector as a whole in the most recent year, as do creative arts and design;
- education shows a very large increase, which should be treated with caution because of changed definitions.

Full-time equivalent enrolments in higher education institutions and further education colleges in England

- 59** A further measure of change in higher education enrolments in England can be derived from the early statistics collected by the Higher Education Funding Council for England (HEFCE). These statistics are collected early in each academic year from both higher education institutions and further education colleges and describe the total enrolments of institutions funded by the council.
- 60** They are expressed in terms of full-time equivalent students. The figures include all students whether funded/fundable by HEFCE or not and are limited in the following table to full-time students at undergraduate level, excluding non-UK domiciled students.
- 61** Total full-time equivalent undergraduate student numbers in further education colleges have declined slightly over the last six years although the sharpest decline was from 2003/04 to 2005/06, before the introduction of variable tuition fees. However, it is notable that enrolments in further education colleges have increased in the most recent year, bringing the total back to almost the same level as in 2003/04. This is a result of enrolments on the expanded programme of foundation degree courses in further education colleges.
- 62** Higher education institutions have seen an increase in full-time equivalent undergraduate student numbers of 8 per cent over the last six years, although there has been little increase in the last two years.

- 63** The impact of these changes on individual institutions can be seen in the following two charts which show the distribution of change on individual institutions, where these can be mapped across the period 2003/04 to 2008/09.⁸

Chart 10
Distribution of change in full-time equivalent enrolments of higher education students in further education colleges, 2003/04–2008/09

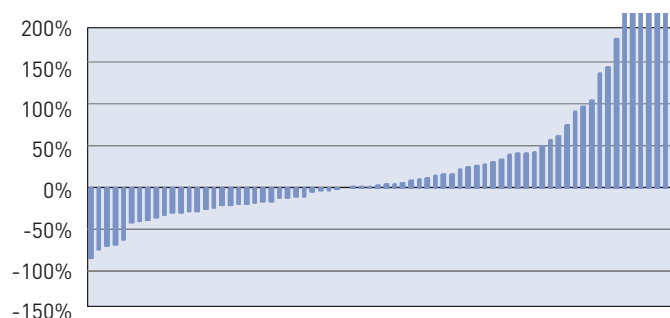


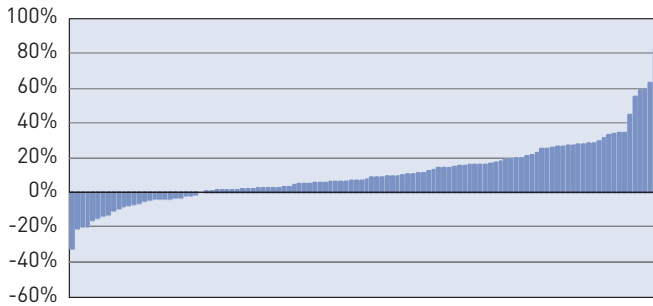
Table 12

Full-time equivalent undergraduate enrolments in higher education institutions and further education colleges in England, 2003/04–2008/09

	Further education colleges	Percentage change on previous year	Higher education institutions	Percentage change on previous year	Total higher education	Percentage change on previous year
2003/04	25,726		801,655		827,381	
2004/05	24,447	-5.0%	815,327	1.7%	839,774	1.5%
2005/06	23,491	-3.9%	837,514	2.7%	861,004	2.5%
2006/07	25,151	7.1%	851,291	1.6%	876,442	1.8%
2007/08	24,302	-3.4%	863,459	1.4%	887,760	1.3%
2008/09	25,514	5.0%	864,037	0.1%	889,551	0.2%
Percentage change, 2003/04 to 2008/09	-0.8%		7.8%		7.5%	

Chart 11

Distribution of change in full-time equivalent enrolments of higher education students in higher education institutions, 2003/04–2008/09



- 64** Very different patterns are evident here. Among further education colleges there is an approximately equal balance between those which have increased their student numbers over the last six years and those that have seen a reduction. The percentage changes are in some instances quite considerable, although some are from a low base. These figures point to a smaller number of further education colleges making significant provision of higher education.
- 65** On the other hand, the large majority of higher education institutions shows increases over the six-year period, but with fewer showing very large changes.

- 66** In our earlier reports we presented the available evidence from institutions' websites and from published agreements approved by the Office for Fair Access (OFFA)⁹ of the fees they intended to charge new entrants to full-time undergraduate programmes from 2006/07 onwards and of the bursaries and scholarships they intended to make available. We also examined the data on additional tuition fee income received and expenditure on financial support for relevant students as a proportion of additional income from the report from OFFA.¹⁰ We then presented the initial evidence on the take-up of tuition fee loans by full-time undergraduate students entering in 2006/07 and 2007/08 from the Student Loans Company^{11,12}.
- 67** For this report we have reviewed:
- institutions' intentions in relation to fees charged to full-time undergraduates and bursaries available for those entering in 2009/10. This data is also set out for each institution in *The Guardian* university guide for 2009¹³. We have also reviewed the information available from institutional websites on the intentions of the main further education colleges providing higher education¹⁴;
 - the 2007/08 data from OFFA on additional fee income and the proportion of the additional income spent on student bursaries and scholarships¹⁵;
 - the latest data on the take-up of fee loans from the Student Loans Company.¹⁶ This covers English-domiciled students attending UK higher education institutions and EU students studying at English institutions. This data includes provisional information about the take-up of fee loans in 2008/09; and
 - the information available from institutional websites on part-time undergraduate fees; we examined whether there was any relationship with changes in the number of new entrants onto part-time first degree courses from 2005/06.
- 69** In some higher education institutions there are some programmes - in particular foundation years, HNDs and foundation degrees - that fall outside this blanket tuition fee. In addition students on sandwich programmes or other undergraduate programmes involving a year out of the institution are charged lower fees up to a maximum of half the statutory full-time undergraduate fee.
- 70** Further education colleges on the other hand have chosen to use the variable fee arrangements more flexibly. OFFA noted in its monitoring report for 2007/08 that of the 50 further education colleges with access agreements 10 chose to charge the standard fee of £1,227 in 2007/08. Of the remaining 40, only 20 charged the maximum allowed, with the remainder charging £1,485-£2,765.
- 71** Our own review of the websites of colleges that are significant providers of higher education confirms the evidence from OFFA that most are intending to charge full-time undergraduate tuition fees in 2009/10 below the statutory maximum. As noted by OFFA, some are continuing to charge the pre-2006/07 standard fee (£1,285 in 2009/10). Even some of those which propose to charge the statutory maximum are only intending to do so for honours degree students.
- 72** In part this observed difference in behaviour reflects the much higher predominance in further education colleges of undergraduate programmes other than first degrees (such as foundation degrees and HNDs) than in higher education institutions. However, it is also clear from the websites of many of the further education colleges that they are seeking to use the lower fees as a marketing tool to attract local students. It is unclear how far they are competing for such students with local higher education institutions as the range of higher education programmes they offer will often be quite different.

Full-time undergraduate fees

- 68** Almost all higher education institutions have charged the statutory maximum fee in each of the last three years and will charge the maximum allowed (£3,225) in 2009/10. Only three institutions in England propose to charge full-time undergraduate tuition fees of less than the maximum in 2009/10. At least two institutions which had in earlier years charged a lower fee are now proposing to charge the maximum fee.

Take-up of fee loans

- 73** Full-time undergraduates attending UK higher education institutions are entitled to take out a fee loan to cover the cost of their tuition fees. Table 13 below summarises the data on the take-up of fee loans by full-time English-domiciled undergraduates attending higher education institutions and further education colleges and entering higher education from 2006/07 onwards. The table also covers the average fee loan taken out.

Table 13

**Take-up of tuition fee loans
2006/07–2008/09 by English-
domiciled undergraduates
entering from 2006/07**

Academic year	Number of loans (000s)	Average sum borrowed (£)
2006/07	231.3	2,710
2007/08 (provisional)	439.2	2,830
2008/09 (provisional)	663.9	2,950

Source: Student Loans Company First Release 05/08 Table 4B

74 The average sum borrowed reflects:

- the lower fee charged by Scottish institutions to English undergraduates than they would pay in England;
- in 2006/07 only the lower fee charged by Welsh institutions;
- the lower average fees charged by further education colleges; and
- the lower fees charged to all students by a very few higher education institutions and by other higher education institutions in England for certain programmes, especially foundation degrees.

75 In order to estimate the take-up of fee loans, it is necessary to adjust the available data on English-domiciled new entrants to full-time higher education in 2006/07 and 2007/08 (309,060 and 322,975 respectively). The adjustments exclude students not eligible for fee loans (primarily those with an existing higher education qualification) and add in eligible students not included in the data on new entrants to full-time undergraduate programmes (mainly Postgraduate Certificate of Education (PGCE) students and full-time undergraduate students in further education colleges on programmes funded by HEFCE). In estimating the eligible population for 2007/08 it is also necessary to allow for students who dropped out at the end of their first year.

76 The adjustments for nursing students and PGCE students are almost self-cancelling and the number of new entrants to full-time undergraduate programmes in further education colleges is around 10,000, based on acceptances through UCAS (excluding entrants on programmes franchised out from higher education institutions who are included in the higher education numbers). The proportion of new entrants with existing higher education qualifications in 2006/07 was 10.8 per cent and in 2007/08 was 11.3 per cent. The higher education performance indicator data for 2007/08¹⁷ suggest that there was an overall retention rate for full-time undergraduates in higher education institutions of around 90 per cent between 2006/07 and 2007/08. On this basis the relevant student populations were 283,000 in 2006/07 and 552,000 in 2007/08.

77 These population figures suggest a take-up rate of around 82 per cent for student fee loans for those entering full-time undergraduate higher education in 2006/07. The corresponding take-up for those entering from 2006/07 onwards in 2007/08 was 80 per cent. However, the actual take-up rate must await official relevant population figures.

Bursaries and scholarships

78 The available data from institutions' websites presented in *The Guardian* university guide (12 May 2009) reveals that the pattern of bursary support offered by institutions remains very much the same as last year with only a very few institutions providing the statutory minimum bursary support of £320 for students who receive a full means-tested higher education maintenance grant. The median figure for maximum support is over £1,000 and a few institutions offer substantially more than this. A few institutions offer bursaries at a modest level to all home and EU undergraduates. This practice is more common among further education colleges, some of which offer bursaries of up to £1,000 to all students. This indicates that they see financial considerations and especially debt burden as an important barrier for the students they are seeking to attract.

79 Most institutions also offer scholarships based on academic achievement either at A-level or on performance at the end of the first year of undergraduate study.

- 80** In our last report we noted that the OFFA monitoring report for 2006/07 showed that higher education institutions spent an average of 21.4 per cent of their additional fee income on financial support for lower income students. This was significantly less than the 25.3 per cent that they had estimated they would spend. One of the main reasons for the underspend was the lower than expected take-up of bursaries by eligible students.
- 81** The OFFA monitoring report for 2007/08 shows that institutions on average spent 21.5 per cent of the additional fee income on bursaries and scholarships for lower income students in 2007/08 with a range between 6 and 48 per cent. The average expenditure was much closer to the forecast of 22.6 per cent than in 2006/07. The monitoring report also shows that 71 per cent of the total expenditure on bursaries and scholarships for low-income students was for those with family incomes below £17,910, who were also entitled to the full higher education maintenance grant.
- 82** There is no evidence of any correlation between the levels of bursary support offered by institutions and changes in level of demand for places over the last five years.

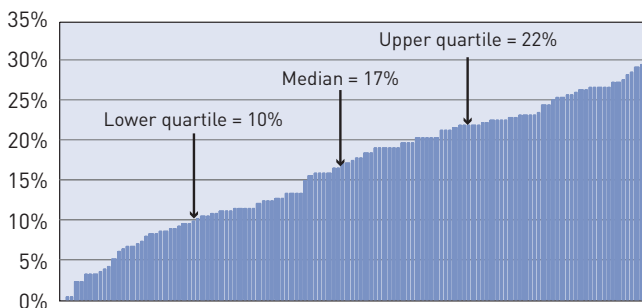
Part-time undergraduate tuition fees

- 83** In our previous reports we have considered the approaches adopted by higher education institutions to part-time undergraduate fees. These demonstrated a range of responses from setting part-time undergraduate fees pro rata to the full-time undergraduate fee to keeping part-time undergraduate fees at the level equivalent to the full-time undergraduate fee prior to 2006/07. Some institutions' policies have been strongly influenced by the maximum level of public fee support available for those on low incomes. To an extent these differences reflect the strongly segmented nature of the part-time undergraduate market – between vocational and non-vocational programmes and between 'second chance' entrants to degree programmes and adults pursuing particular interests in their own time.
- 84** We have reviewed again the information provided by institutions on their websites on proposed part-time undergraduate fees for 2009/10, but concentrating on those which had more than 0.5 per cent of the total of part-time first degree students in 2007/08. This comprises 40 institutions which enrolled around 88 per cent of the total of part-time first degree students in 2007/08. Most of the published fee levels are on the basis for a 20-credit or 15-credit module. A very wide range of fees is being charged.
- 85** A few institutions have continued to charge at the level equivalent to the pre-2006/07 standard full-time undergraduate fee and a similarly small number has increased their part-time undergraduate fees pro rata to the maximum full-time undergraduate fee. The majority lie between these two extremes with the median close to public support available for low-income students studying at an intensity of 0.5 full-time equivalent of around £800.
- 86** On average part-time undergraduate fee levels are now significantly higher in real terms than before the introduction of variable fees for full-time undergraduates in 2006/07. As we noted earlier, first-year part-time undergraduate enrolments fell modestly between 2006/07 and 2007/08 and this may reflect higher tuition fee levels. Those institutions charging part-time tuition fees pro rata to the maximum full-time undergraduate fee experienced a reduction in part-time undergraduate first degree enrolments between 2006/07 and 2007/08, but no corresponding reduction in part-time undergraduate fee income. Given the longer period of study for those obtaining undergraduate qualifications on a part-time basis, it will need several years' data to be certain of the impact of increased part-time undergraduate fees.

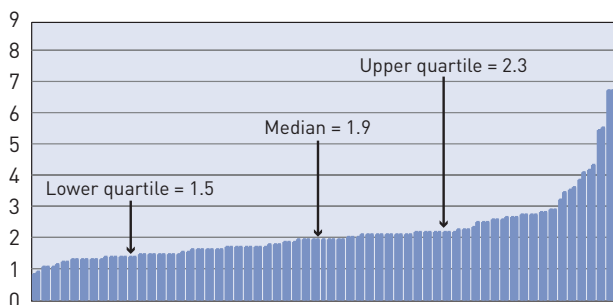
- 87** In our previous reports we provided distribution charts for four years for all higher education institutions in England, relating the fee income from undergraduate tuition fees to total institutional income and also to the teaching grant received from the funding council.
- 88** The equivalent charts for 2007/08 follow and are themselves followed by a summary of the change in institutional distribution over the last five years.

Chart 12

Full-time undergraduate fees as a percentage of total income of English higher education institutions, 2007/08

**Chart 13**

Ratio of funding council grant for teaching to full-time undergraduate fee income of English higher education institutions, 2007/08



- 89** The following table shows the change over the last five years in the relationship of full-time undergraduate fee income, overall income and funding council teaching grant, mapping this change among institutions.

Table 14

Relationship between full-time undergraduate tuition fees, total income and funding council teaching grant, English institutions, 2003/04–2007/08

Institutions	Full-time undergraduate fees as percentage of total higher education institution income			Ratio of funding council teaching grant to full-time undergraduate fees		
	Lower quartile	Median	Upper quartile	Lower quartile	Median	Upper quartile
2003/04	7%	11%	15%	2.1	3.1	4.0
2004/05	7%	11%	15%	2.1	3.3	4.3
2005/06	7%	12%	16%	2.0	3.2	4.3
2006/07	9%	15%	20%	1.8	2.4	2.9
2007/08	10%	17%	22%	1.5	1.9	2.3

- 90** We see here a very clear change in 2006/07, as might be expected, with the tuition fee income from full-time undergraduates increasing markedly as a percentage of total institutional income and declining therefore in its ratio with funding council teaching grant. The changes are particularly significant, of course, among those institutions which feature in the upper quartile, in other words those that are most dependent on undergraduate fee income and teaching funding.

Year on year change in higher education institution income

- 91** The following table updates the table in our previous reports showing the percentage change, in real terms¹⁸, in the major sources of income to institutions in England between 2003/04 and 2007/08.

Table 15

Income and real terms percentage change in major income sources of English higher education institutions, 2003/04–2007/08

	2003/04	2004/05	2005/06	2006/07	2007/08	Percentage change 2003/04 to 2007/08	Percentage change 2006/07 to 2007/08
	£K (adjusted to 2004/05 prices)	£K	£K (adjusted to 2004/05 prices)	£K (adjusted to 2004/05 prices)	£K (adjusted to 2004/05 prices)		
Funding council teaching grant	3,576,247	3,835,520	3,944,508	4,115,004	4,197,205	17.4%	2.0%
Funding council research grant	1,059,159	1,078,557	1,226,002	1,280,304	1,308,581	23.5%	2.2%
Other funding council grants	719,818	704,364	830,990	754,258	861,074	19.6%	14.2%
Total funding council grants	5,355,224	5,618,441	6,001,501	6,149,565	6,366,859	18.9%	3.5%
Tuition fees and education grants and contracts	3,556,347	3,687,006	3,864,197	4,429,497	4,606,179	29.5%	4.0%
of which, full-time undergraduate fees	1,340,520	1,383,570	1,455,129	1,854,903	2,241,288	67.2%	20.8%
Research grants and contracts	2,258,654	2,347,239	2,490,407	2,615,252	2,794,348	23.7%	6.8%
Other services rendered	788,659	822,328	990,058	1,056,163	1,143,148	44.9%	8.2%
Residences and catering operations	900,582	922,764	954,131	985,309	1,023,633	13.7%	3.9%
Other operating income	808,194	818,358	868,449	855,867	922,031	14.1%	7.7%
Endowment and investment income	201,367	253,872	283,274	311,074	390,957	94.2%	25.7%
Other income	317,826	351,352	348,226	358,040	755,642	137.8%	111.0%
Total income	14,186,852	14,821,360	15,800,243	16,760,766	18,002,795	26.9%	7.4%

92 It follows from the introduction of variable fees that English institutions saw a significant real terms increase in full-time undergraduate fee income in 2006/07 and this has been followed by a further increase in 2007/08 as the second cohort of students charged the new fee was enrolled.

93 The following two charts illustrate the percentage breakdown of income across major heads in the base year (2003/04) and the latest year (2007/08).

Chart 15

Breakdown of income across major heads: English higher education institutions, 2007/08

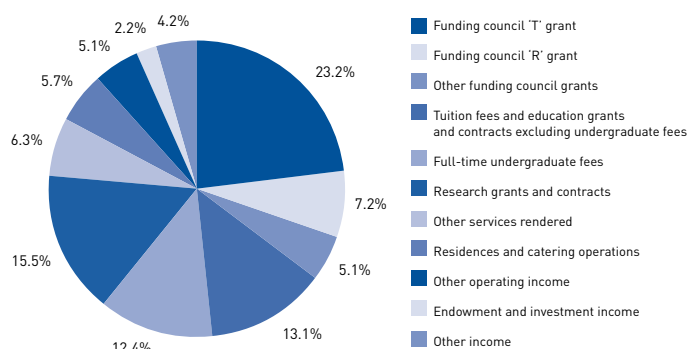
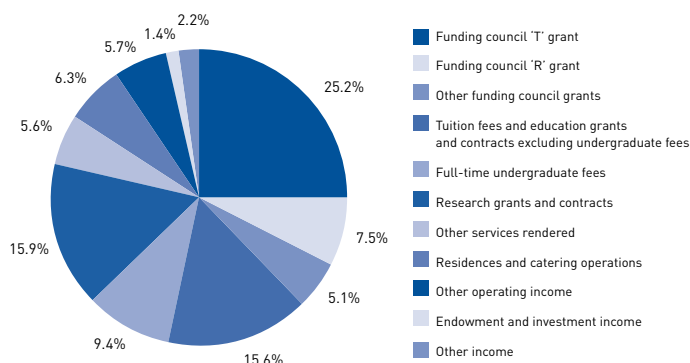


Chart 14

Breakdown of income across major heads: English higher education institutions, 2003/04



- 94** We see here clearly the effect on the distribution of the total of institutional income arising from the introduction of variable fees: the full-time undergraduate fee income in the latest year amounts to one eighth of overall institutional income compared to less than 10 per cent in 2003/04. By 2007/08, full-time undergraduate fee income was almost equal to the total of all other fee income, including international (non-EU) student income, which increased by a modest 6 per cent in real terms between 2003/04 and 2007/08.
- 95** This shift in the proportion of total income attributable to full-time undergraduate fees may appear relatively small – three percentage points – but it is huge given the total of institutional income and the parallel significant increases in some other elements of that income, especially research grants and contracts and other services rendered. For those institutions most heavily dependent on teaching income, the effect will have been much more marked.

- 96** The purpose of this series of reports has been to assess the impact of the introduction of variable tuition fees (including the availability of income contingent fee loans) for home and EU full-time undergraduate students in England from 2006/07, by analysing changes in application rates, enrolments and fee income. The variable fee arrangements required institutions which decided to charge the maximum allowable fee to provide minimum bursaries for students from low-income families.
- 97** Although this study is primarily concerned with the impact on undergraduate higher education in England, the same variable fee arrangements were introduced simultaneously in Northern Ireland. A similar system was introduced in Wales from 2007/08, with the important difference that Welsh-domiciled students were eligible for a fee support grant equal to the difference between the increased fee and the previous fee. Scotland has moved to a system where Scottish-domiciled students make no contribution to full-time undergraduate fees, although English-domiciled students are charged fees (significantly below the maximum fee charged by English higher education institutions). We have therefore analysed cross-border flows of students within the UK across the period.
- 98** Almost all institutions in England (and Wales) are now proposing to charge the permitted maximum fee for first degree programmes in 2009/10 of £3,225, although several charge lower fees for foundation degree and other sub-degree programmes. Most further education colleges on the other hand have decided to charge full-time undergraduate fees below the maximum permitted. While this reflects the different mix of higher education programmes in further education colleges, with a much higher proportion of foundation degree and other sub-degree programmes, it is also clear that further education colleges are using lower fees as a marketing tool.
- 99** The data on application rates for full-time undergraduate programmes from UCAS as measured by applicants per thousand of the 17-year-old population (the main leading indicator of demand) showed a one-year reduction of 3 per cent in England between 2005/06 and 2006/07 against a pattern of continuing growth over the six years of 30 per cent. Growth was resumed for the 2007/08 entry and has continued since. This pattern has now been confirmed in the first-year full-time undergraduate enrolment data from the Higher Education Statistics Agency (HESA) for UK domiciled students, which showed a drop of 4.3 per cent between 2005/06 and 2006/07 followed by an increase of a similar magnitude between 2006/07 and 2007/08. These observations are strongly consistent with the view that, where individuals could avoid the new fees by entering higher education before they were introduced, they did so, but otherwise there has been no impact on overall demand. In Wales, where fee changes were introduced a year later, a similar but much less marked pattern of change in year on year demand was observed.
- 100** The percentage increase in applicants per thousand of the 17-year-old population was strongest across all the countries of the UK between 2008 and 2009, in a year when the 17-year-old population fell slightly. However, although 17 is the conventional age of application to full-time degree courses, applications come from older people too and the UCAS data show much stronger growth of UK applications between 2008 and 2009 from applicants aged 21 and over than from applicants aged 20 and under (over 12 per cent compared to around 6 per cent). This suggests that the economic recession is significantly affecting demand for initial undergraduate education from young people and especially from those who decided not to enter higher education on leaving school but who now see their current jobs and future employment prospects threatened by the recession.
- 101** The data on first-year full-time undergraduate enrolments from HESA by country of domicile and location of institution for 2006/07 and 2007/08 show that there has been a marked increase in each of the last two years in the proportion of Welsh-domiciled students choosing to study in Wales, after a period when that proportion was declining. This is clearly linked to Welsh institutions charging Welsh-domiciled students lower actual or effective tuition fees than English institutions. Cross-border flows between the other countries of the UK have been virtually unaffected by the introduction of variable tuition fees for full-time undergraduates.

- 102** The UCAS data also show how the pattern of demand, as reflected by acceptances onto first degree programmes, has changed over the period from 2004 by minority ethnic group, age on entry and socio-economic grouping. However, the evidence needs to be treated with caution because it includes not only a significant and growing proportion of unknowns, but also because the coverage changed significantly from 2008 to include applicants for nursing and midwifery and associated subjects, who were previously outside the UCAS system.
- 103** The UCAS data on the acceptances onto degree programmes by ethnicity show a small decline in the proportion of white students between 2004 and 2008 from nearly 80 per cent of all acceptances in 2004 to 77.4 per cent in 2008. It is interesting to note that most of this decline in the proportion of acceptances amongst white students was between 2005 and 2006, suggesting that it is possible that white young people were more influenced by the new fee and loan arrangements than their counterparts from other ethnic groups. The biggest increases have been in the proportion of black African and mixed white and black Caribbean students. However, in the absence of data on the ethnic mix of the population by age, it is not possible to draw any firm conclusions.
- 104** The UCAS data on acceptances also show a significant increase in the proportion of accepted students aged 21 and over from 20.4 per cent to 22.3 per cent between 2007 and 2008, after a period of little change from 2004. The effect of the inclusion for the first time in 2008 of those accepted onto nursing and midwifery programmes can be seen from the increase in the proportion of acceptances aged 21 and over for subjects allied to medicine as a whole from 12 per cent in 2007 to 22 per cent in 2008.
- 105** The data on the socio-economic groups of accepted students show a significant change between 2007 and 2008, following a period of relative stability from 2004, with a reduction in the proportion of acceptances from the two highest socio-economic groups – from 54.5 per cent to 50 per cent – and a corresponding increase in the proportion of acceptances from the two lowest socio-economic groups – from 20 per cent to 24 per cent. This may also be at least partially attributable to the inclusion of those accepted onto nursery and midwifery programmes but there remains a high proportion of acceptances of unknown socio-economic group.
- 106** Overall, with the possible exception of a small reduction in the proportion of white ethnic students gaining acceptance onto degree programmes, there is no firm evidence that the introduction of the new fees has had any impact on the mix of individuals gaining entry to degree programmes
- 107** There is no evidence either that the introduction of the new full-time undergraduate fees has had any impact on student subject choices. There have been significant changes in subject balance of acceptances onto first degree programmes over the last five years, with significant declines in computer science, business and management and, most recently, subjects allied to medicine. There have been increases in other subject areas. These changes would appear to reflect longer term cyclical changes in the perceptions of individuals about subject choice and career prospects rather than any issue about tuition fees.
- 108** Institutions have adopted a wide range of bursary schemes to address the requirement to provide financial support for full-time undergraduate students from low-income families, with the maximum bursary available being significantly influenced by the expected proportion of such students within the entrants to the institution concerned. However, there is no evidence from the applications data that the maximum level of bursary has had any influence on application rates to individual institutions.
- 109** The provisional data from the Student Loans Company on the take-up of tuition fee loans by English-domiciled students entering full-time undergraduate higher education from 2006/07 is 72–74 per cent. This is lower than the take-up rate for maintenance loans.

- 110** Because of the concerns about the impact of the new fee and student support arrangements for full-time undergraduate students on demand for part-time undergraduate study, we have also monitored part-time undergraduate enrolments and institutional decisions on the level of part-time undergraduate fees. The new entrant data for part-time undergraduate programmes show that the number of enrolments in English institutions increased between 2005/06 and 2006/07 but declined in 2007/08. Although only a few institutions have chosen to increase part-time undergraduate fees in line with the full-time fee, most have nevertheless substantially increased part-time undergraduate fees in real terms since 2005/06. It may be therefore that the observed reduction in new entrants in 2007/08 may harden into a significant reduction in part-time undergraduate student numbers overall, as the full impact of the fee increases are felt. Some institutions have pitched their part-time undergraduate fees at the maximum level of public support for fees, but there is no evidence whether this has had any impact on demand.
- 111** However, as is clear from all the websites, the higher level of fees to be charged to those who wish to study for a qualification that is equivalent to or lower than a qualification they already hold (ELQ), following the withdrawal of HEFCE funding for such students, could well have a more significant impact on demand for part-time undergraduate higher education than the relatively modest increase in part-time undergraduate fees.
- 112** The increased income from full-time undergraduate fees has increased the proportion of total institutional income from this source by three percentage points between 2003/04 and 2007/08 and this will increase further in 2008/09. The median ratio of funding HEFCE teaching grant to full-time undergraduate fees has also declined sharply since 2005/06 from 3.2 to 1.9. It seems likely that without penalties for over-recruitment there would be strong incentives on institutions to increase their full-time undergraduate recruitment even if no additional HEFCE funded student numbers were available (fees only recruitment). However, given the public expenditure consequences of increased demand for grants and loans, it is not surprising that the Government should seek through HEFCE to restrain such fees only recruitment.
- 113** Overall the impact of the new full-time undergraduate fees on student demand has been minimal. It led to a reduction in new full-time undergraduate enrolments in 2006/07 but then growth resumed. The decisions by many institutions to increase part-time undergraduate fees in real terms, although usually by less than the pro rata increase in the full-time undergraduate fee, may have reduced demand for part-time undergraduate study. However, it may be some time before the full picture emerges on this point.
- 114** Finally, in assessing the impact of a single policy change, it is always important to bear in mind other changes taking place and changes in the coverage or definitions of data being used. Clearly the recession has had a significant impact on the level of applications in 2009 and the withdrawal of HEFCE funding for ELQ students may have a significant impact on demand for part-time undergraduate programmes. Neither of these is directly attributable to the introduction of variable fees. Similarly the inclusion of nursing and midwifery applicants within UCAS from 2008 has had a significant impact on the data on the characteristics of students accepted onto first degree programmes.

Appendix 1 Applicants by overseas country

Applicants by overseas country (→ 600 applicants only)			
Country	2009	2008	Percentage change
Ireland	4,871	4,312	13.0%
China	3,641	3,386	7.5%
Hong Kong	2,730	2,711	0.7%
Germany	2,670	2,472	8.0%
Cyprus	2,664	2,277	17.0%
Singapore	2,018	1,657	21.8%
France	2,001	1,749	14.4%
United States of America	1,926	1,872	2.9%
Malaysia	1,858	1,772	4.9%
Poland	1,566	1,734	-9.7%
Greece	1,491	1,342	11.1%
Pakistan	1,463	1,295	13.0%
India	1,338	1,155	15.8%
Bulgaria	1,336	845	58.1%
Canada	1,201	1,136	5.7%
Italy	1,160	958	21.1%
Sweden	1,135	1,058	7.3%
Lithuania	1,061	871	21.8%
Nigeria	964	946	1.9%
Spain	897	803	11.7%
Romania	818	474	72.6%
Belgium	768	667	15.1%
Korea (South)	642	533	20.5%
Switzerland	639	527	21.3%
Norway	630	661	-4.7%
All overseas	55,245	49,664	11.2%

Source: UCAS

Appendix 2 First-year undergraduate students by qualification and domicile, 2003/04–2007/08

All first year undergraduate students in UK higher education institutions, 2003/04

	Full-time	Part-time	Total
Total first-year undergraduates	429,730	319,530	749,260
Qualification aimed for			
First degree	366,750	64,480	431,230
Other undergraduate	62,975	255,050	318,025
Domicile			
First degree			
United Kingdom	320,290	60,915	381,205
Other European Union	15,060	790	15,850
Non-European Union	31,405	2,780	34,185
Other undergraduate			
United Kingdom	52,545	242,750	295,295
Other European Union	2,360	4,505	6,865
Non-European Union	8,070	7800	15,870

All first-year undergraduate students in UK higher education institutions, 2004/05

	Full-time	Part-time	Total
Total first-year undergraduates	431,860	317,840	749,700
Qualification aimed for			
First degree	369,810	61,670	431,480
Other undergraduate	62,050	256,170	318,220
Domicile			
First degree			
United Kingdom	320,865	58,285	379,150
Other European Union	18,160	890	19,050
Non-European Union	30,785	2,495	33,280
Other undergraduate			
United Kingdom	53,145	241,485	294,630
Other European Union	2,515	5,740	8,255
Non-European Union	6,390	8,945	15,335

All first-year undergraduate students in UK higher education institutions, 2005/06

	Full-time	Part-time	Total
Total first-year undergraduates	450,920	336,490	787,410
Qualification aimed for			
First degree	389,355	69,410	458,765
Other undergraduate	61,565	267,080	328,645
Domicile			
First degree			
United Kingdom	339,930	65,765	405,695
Other European Union	20,255	840	21,095
Non-European Union	29,170	2,805	31,975
Other undergraduate			
United Kingdom	53,630	252,265	305,895
Other European Union	2,440	6,380	8,820
Non-European Union	5,495	8,435	13,930

All first-year undergraduate students in UK higher education institutions, 2006/07

	Full-time	Part-time	Total
Total first-year undergraduates	437,545	341,185	778,730
Qualification aimed for			-
First degree	377,400	66,330	443,730
Other undergraduate	60,145	274,855	335,000
Domicile			-
First degree			-
United Kingdom	325,550	62,640	388,190
Other European Union	20,985	910	21,895
Non-European Union	30,865	2,775	33,640
Other undergraduate			-
United Kingdom	51,055	257,460	308,515
Other European Union	2,730	7,280	10,010
Non-European Union	6,360	10,110	16,470

All first-year undergraduate students in UK higher education institutions, 2007/08

	Full-time	Part-time	Total
Total first-year undergraduates	459,395	331,950	791,345
Qualification aimed for			
First degree	394,885	65,355	460,240
Other undergraduate	64,515	266,595	331,110
Domicile			
First degree			
United Kingdom	338,720	61,410	400,130
Other European Union	23,200	905	24,105
Non-European Union	32,965	3,040	36,005
Other undergraduate			
United Kingdom	55,590	249,980	305,570
Other European Union	2,515	8,145	10,660
Non-European Union	6,410	8,470	14,880

Appendix 3 Cross-border flows: data for 2003/04–2006/07

The data in this appendix is provided for comparison with the latest information in this report.

First-year full-time UK-domiciled¹⁹ undergraduate students by country of domicile and country of institution, 2003/04

Country of domicile	Country of institution				Total
	England	Wales	Scotland	Northern Ireland	
England	289,885	9,095	3,810	70	302,860
Wales	6,410	12,965	125	5	19,505
Scotland	2,010	80	33,000	15	35,105
Northern Ireland	2,400	95	1,335	9,560	13,385
Total	300,705	22,240	38,265	9,650	370,860

First-year full-time UK-domiciled undergraduate students by country of domicile and country of institution, 2003/04 – percentages by country

Country of domicile	Country of institution				Total
	England	Wales	Scotland	Northern Ireland	
England	95.7%	3.0%	1.3%	0.0%	100.0%
Wales	32.9%	66.5%	0.6%	0.0%	100.0%
Scotland	5.7%	0.2%	94.0%	0.0%	100.0%
Northern Ireland	17.9%	0.7%	10.0%	71.4%	100.0%
Total	81.1%	6.0%	10.3%	2.6%	100.0%

First-year full-time UK-domiciled²⁰ undergraduate students by country of domicile and country of institution, 2004/05

Country of domicile	Country of institution				Total
	England	Wales	Scotland	Northern Ireland	
England	293,700	9,105	3,935	80	306,820
Wales	6,190	12,180	120	5	18,500
Scotland	1,885	60	31,305	20	33,265
Northern Ireland	2,635	90	1,235	9,730	13,690
Total	304,410	21,435	36,595	9,835	372,275

First-year full-time UK-domiciled undergraduate students by country of domicile and country of institution, 2004/05 – percentages by country

Country of domicile	Country of institution				Total
	England	Wales	Scotland	Northern Ireland	
England	95.7%	3.0%	1.3%	0.0%	100.0%
Wales	33.5%	65.8%	0.6%	0.0%	100.0%
Scotland	5.7%	0.2%	94.1%	0.1%	100.0%
Northern Ireland	19.2%	0.7%	9.0%	71.1%	100.0%
Total	81.8%	5.8%	9.8%	2.6%	100.0%

**First-year full-time UK-domiciled²¹
undergraduate students by country of domicile
and country of institution, 2005/06**

Country of domicile	Country of institution				Total
	England	Wales	Scotland	Northern Ireland	
England	293,495	9,305	4,090	90	306,980
Wales	6,175	11,330	120	5	17,630
Scotland	1,810	60	30,050	15	31,940
Northern Ireland	2,645	105	1,225	9,870	13,845
Total	304,125	20,800	35,485	9,980	370,395

**First-year full-time UK-domiciled
undergraduate students by country of domicile
and country of institution, 2005/06 –
percentages by country**

Country of domicile	Country of institution				Total
	England	Wales	Scotland	Northern Ireland	
England	95.6%	3.0%	1.3%	0.0%	100.0%
Wales	35.0%	64.3%	0.7%	0.0%	100.0%
Scotland	5.7%	0.2%	94.1%	0.0%	100.0%
Northern Ireland	19.1%	0.8%	8.8%	71.3%	100.0%
Total	82.1%	5.6%	9.6%	2.7%	100.0%

**First-year full-time UK-domiciled
undergraduate students by country of domicile
and country of institution, 2006/07**

Country of domicile	Country of institution				Total
	England	Wales	Scotland	Northern Ireland	
England	296,725	8,735	3,525	80	309,060
Wales	5,460	13,515	100	5	19,080
Scotland	1,775	70	31,315	10	33,175
Northern Ireland	2,720	100	1,210	9,035	13,065
Total	306,685	22,415	36,150	9,130	374,380

Appendix 4
Enrolments of full-time UK-domiciled
undergraduates by detailed subject of study,
2003/04–2007/08 and trend analysis

	2003/04	2004/05	2005/06	2006/07	2007/08	Percentage change 2003/04 to 2007/08	Percentage change 2005/06 to 2007/08
Medicine and dentistry	8,275	8,615	8,865	8,740	8,895	7.5%	1.8%
Broadly-based programmes within medicine and dentistry	-	-	-	-	-	-	-
Pre-clinical medicine	5,555	5,640	6,060	5,430	4,170	-24.9%	-23.2%
Pre-clinical dentistry	735	715	875	670	590	-19.7%	-11.9%
Clinical medicine	1,720	1,870	1,465	2,095	3,455	100.9%	64.9%
Clinical dentistry	235	340	370	495	630	168.1%	27.3%
Others in medicine and dentistry	30	45	85	50	40	33.3%	-20.0%
Subjects allied to medicine	49,175	51,595	53,095	48,750	46,480	-5.5%	-4.7%
Broadly-based programmes within subjects allied to medicine	205	170	215	165	160	-22.0%	-3.0%
Anatomy, physiology and pathology	3,410	3,875	3,985	3,710	3,660	7.3%	-1.3%
Pharmacology, toxicology and pharmacy	2,370	2,750	3,195	3,230	3,330	40.5%	3.1%
Complementary medicine	1,085	1,445	1,375	1,400	1,155	6.5%	-17.5%
Nutrition	705	835	985	1,060	1,105	56.7%	4.2%
Ophthalmics	675	710	695	685	725	7.4%	5.8%
Aural and oral sciences	870	790	885	810	810	-6.9%	0.0%
Nursing	32,300	33,265	33,330	29,860	27,955	-13.5%	-6.4%
Medical technology	1,635	1,915	1,935	1,755	1,785	9.2%	1.7%
Others in subjects allied to medicine	5,905	5,845	6,495	6,075	5,805	-1.7%	-4.4%
Biological sciences	34,035	34,405	37,290	37,115	38,930	14.4%	4.9%
Broadly-based programmes within biological sciences	245	280	275	405	190	-22.4%	-53.1%
Biology	5,940	5,840	6,290	5,880	6,355	7.0%	8.1%
Botany	100	80	60	90	85	-15.0%	-5.6%
Zoology	1,065	950	965	1,015	1,070	0.5%	5.4%
Genetics	405	350	375	365	350	-13.6%	-4.1%
Microbiology	595	530	510	515	470	-21.0%	-8.7%
Sports science	7,940	8,530	10,225	10,545	11,865	49.4%	12.5%
Molecular biology, biophysics and biochemistry	1,815	1,855	2,030	1,950	2,145	18.2%	10.0%
Psychology	13,845	14,210	15,120	14,485	14,900	7.6%	2.9%
Others in biological sciences	2,085	1,785	1,445	1,865	1,500	-28.1%	-19.6%
Veterinary science	705	740	745	795	835	18.4%	5.0%
Pre-clinical veterinary medicine	365	385	360	290	300	-17.8%	3.4%
Clinical veterinary medicine and dentistry	340	355	385	500	535	57.4%	7.0%
Agriculture and related subjects	3,765	3,705	3,945	3,810	4,015	6.6%	5.4%
Broadly-based programmes within agriculture and related subjects	-	-	-	-	-	-	-
Animal science	920	940	1,010	1,180	1,415	53.8%	19.9%
Agriculture	1,945	1,835	1,935	1,675	1,670	-14.1%	-0.3%
Forestry	155	160	165	180	110	-29.0%	-38.9%
Food and beverage studies	495	460	550	470	525	6.1%	11.7%
Agricultural sciences	55	60	60	45	0	-100.0%	-100.0%

	2003/04	2004/05	2005/06	2006/07	2007/08	Percentage change 2003/04 to 2007/08	Percentage change 2005/06 to 2007/08
Others in veterinary sciences, agriculture and related subjects	205	255	225	265	300	46.3%	13.2%
Physical sciences	15,225	14,880	16,480	16,105	16,995	11.6%	5.5%
Broadly-based programmes within physical sciences	375	385	410	215	255	-32.0%	18.6%
Chemistry	3,390	3,200	3,620	3,640	3,795	11.9%	4.3%
Materials science	45	50	50	60	70	55.6%	16.7%
Physics	2,780	2,660	2,800	2,750	3,115	12.1%	13.3%
Forensic and archaeological science	1,250	1,805	2,255	2,430	2,560	104.8%	5.3%
Astronomy	345	295	275	255	230	-33.3%	-9.8%
Geology	1,395	1,285	1,360	1,275	1,330	-4.7%	4.3%
Physical geographical sciences and science of aquatic and terrestrial environments	5,025	4,610	5,035	4,760	4,965	-1.2%	4.3%
Others in physical sciences	615	590	675	725	680	10.6%	-6.2%
Mathematical sciences	5,600	6,010	6,330	6,395	6,880	22.9%	7.6%
Broadly-based programmes within mathematical sciences	45	25	35	40	25	-44.4%	-37.5%
Mathematics	4,945	5,525	5,865	5,920	6,530	32.1%	10.3%
Operational research	120	70	50	50	60	-50.0%	20.0%
Statistics	370	305	285	235	235	-36.5%	0.0%
Others in mathematical sciences	5	5	-	-	30	500.0%	
	110	80	100	165	0	-100.0%	-100.0%
Computer science	25,600	21,545	20,385	18,905	18,370	-28.2%	-2.8%
Broadly-based programmes within computer science							
Computer science	18,250	15,285	14,535	13,695	13,005	-28.7%	-5.0%
Information systems	5,660	4,795	4,345	3,790	3,790	-33.0%	0.0%
Software engineering	1,515	1,305	1,315	1,260	1,385	-8.6%	9.9%
Artificial intelligence	135	120	115	115	95	-29.6%	-17.4%
Others in computing sciences	40	45	75	55	35	-12.5%	-36.4%
Engineering and technology	20,840	20,700	20,890	20,295	21,395	2.7%	5.4%
Broadly-based programmes within engineering and technology	85	65	90	70	70	-17.6%	0.0%
General engineering	3,180	2,855	2,690	2,555	2,620	-17.6%	2.5%
Civil engineering	2,175	2,880	2,920	2,925	3,370	54.9%	15.2%
Mechanical engineering	3,735	3,860	3,985	3,695	3,800	1.7%	2.8%
Aerospace engineering	1,575	1,540	1,625	1,610	1,630	3.5%	1.2%
Naval architecture	100	90	90	95	115	15.0%	21.1%
Electronic and electrical engineering	5,100	4,680	4,480	4,290	4,205	-17.5%	-2.0%
Production and manufacturing engineering	1,115	1,010	880	735	735	-34.1%	0.0%
Chemical, process and energy engineering	635	655	710	810	960	51.2%	18.5%
Others in engineering	170	140	160	110	105	-38.2%	-4.5%
Minerals technology	45	30	15	35	35	-22.2%	0.0%
Metallurgy	45	30	40	20	20	-55.6%	0.0%
Ceramics and glasses	30	10	20	15	10	-66.7%	-33.3%
Polymers and textiles	700	660	750	635	785	12.1%	23.6%
Materials technology not otherwise specified	420	480	390	380	400	-4.8%	5.3%
Maritime technology	180	165	180	295	330	83.3%	11.9%
Biotechnology	15	10	10	15	65	333.3%	333.3%
Others in technology	1,535	1,545	1,855	2,025	2,130	38.8%	5.2%

	2003/04	2004/05	2005/06	2006/07	2007/08	Percentage change 2003/04 to 2007/08	Percentage change 2005/06 to 2007/08
Architecture, building and planning	7,440	7,855	9,690	9,665	10,310	38.6%	6.7%
Broadly-based programmes within architecture, building and planning	-	-					
Architecture	3,235	3,450	4,340	4,210	4,360	34.8%	3.6%
Building	2,565	2,710	3,485	3,525	3,800	48.1%	7.8%
Landscape design	310	335	325	295	315	1.6%	6.8%
Planning (urban, rural and regional)	1,295	1,295	1,420	1,465	1,560	20.5%	6.5%
Others in architecture, building and planning	30	70	115	170	190	533.3%	11.8%
Social studies	32,980	33,770	35,630	34,050	36,570	10.9%	7.4%
Broadly-based programmes within social studies	115	100	50	265	155	34.8%	-41.5%
Economics	5,740	5,625	5,695	5,105	5,625	-2.0%	10.2%
Politics	5,560	5,695	6,100	5,630	5,790	4.1%	2.8%
Sociology	8,280	7,855	8,445	7,870	7,480	-9.7%	-5.0%
Social policy	1,595	1,995	2,280	2,415	3,010	88.7%	24.6%
Social work	6,445	7,285	7,790	8,040	9,260	43.7%	15.2%
Anthropology	815	860	995	895	900	10.4%	0.6%
Human and social geography	3,220	3,150	3,115	2,625	2,735	-15.1%	4.2%
Others in social studies	1,215	1,200	1,160	1,210	1,605	32.1%	32.6%
Law	16,090	16,680	16,570	15,690	16,970	5.5%	8.2%
Broadly-based programmes within law	455	615	405	465	420	-7.7%	-9.7%
Law by area	5,935	5,895	5,935	6,610	7,295	22.9%	10.4%
Law by topic	8,925	9,305	9,520	7,950	8,405	-5.8%	5.7%
Others in law	770	865	710	665	850	10.4%	27.8%
Business and administrative studies	45,310	43,950	44,595	43,160	45,500	0.4%	5.4%
Broadly-based programmes within business and administrative studies	375	435	5	20	10	-97.3%	-50.0%
Business studies	20,015	19,020	18,590	17,435	17,800	-11.1%	2.1%
Management studies	8,975	9,050	9,615	9,270	7,080	-21.1%	-23.6%
Finance	1,605	1,575	1,820	2,010	2,250	40.2%	11.9%
Accounting	5,800	6,010	5,815	5,845	6,165	6.3%	5.5%
Marketing	4,075	3,680	4,080	3,920	4,125	1.2%	5.2%
Human resource management	1,030	955	855	905	780	-24.3%	-13.8%
Office skills	25	25	60	30	0	-100.0%	-100.0%
Hospitality, leisure, tourism and transport	3,145	2,880	3,520	3,450	6,960	121.3%	101.7%
Others in business and administrative studies	260	310	230	275	335	28.8%	21.8%
Mass communications and documentation	11,855	11,895	12,600	11,875	12,630	6.5%	6.4%
Broadly-based programmes within mass communications and documentation	10	-	-	5	0	-100.0%	-100.0%
Information services	405	335	400	375	360	-11.1%	-4.0%
Publicity studies	1,005	1,075	1,075	885	880	-12.4%	-0.6%
Media studies	7,980	7,595	8,020	7,755	8,400	5.3%	8.3%
Publishing	400	410	365	215	125	-68.8%	-41.9%
Journalism	1,710	2,165	2,385	2,390	2,605	52.3%	9.0%
Others in mass communications and documentation	350	315	360	255	250	-28.6%	-2.0%

	2003/04	2004/05	2005/06	2006/07	2007/08	Percentage change 2003/04 to 2007/08	Percentage change 2005/06 to 2007/08
Languages	22,345	22,115	23,455	22,305	22,770	1.9%	2.1%
Broadly-based programmes within languages	25	5	15	10	195	680.0%	1850.0%
Linguistics	850	840	835	780	830	-2.4%	6.4%
Comparative literary studies	250	180	215	150	155	-38.0%	3.3%
English studies	11,910	11,830	12,780	12,320	12,585	5.7%	2.2%
Ancient language studies	15	35	25	25	20	33.3%	-20.0%
Celtic studies	290	265	280	260	235	-19.0%	-9.6%
Latin studies	25	25	20	20	25	0.0%	25.0%
Classical Greek studies	15	10	5	5	10	-33.3%	100.0%
Classical studies	860	915	1,095	980	970	12.8%	-1.0%
Others in linguistics, classics and related subjects	105	140	145	145	155	47.6%	6.9%
French studies	1,990	2,000	2,060	1,990	2,145	7.8%	7.8%
German studies	775	715	730	750	815	5.2%	8.7%
Italian studies	370	335	330	325	305	-17.6%	-6.2%
Spanish studies	1,125	1,195	1,230	1,165	1,285	14.2%	10.3%
Portuguese studies	75	80	85	80	60	-20.0%	-25.0%
Scandinavian studies	45	30	25	20	15	-66.7%	-25.0%
Russian and East European studies	210	210	215	190	200	-4.8%	5.3%
European studies					75		
Others in European languages, literature and related subjects	1,330	1,265	1,315	1,240	1,065	-19.9%	-14.1%
Chinese studies	115	125	165	215	220	91.3%	2.3%
Japanese studies	150	200	185	190	220	46.7%	15.8%
South Asian studies	50	60	60	50	60	20.0%	20.0%
Other Asian studies	5	10	10	15	10	100.0%	-33.3%
African studies	45	40	30	35	45	0.0%	28.6%
Modern Middle Eastern studies	190	210	195	190	195	2.6%	2.6%
American studies	1,215	1,080	1,055	825	785	-35.4%	-4.8%
Australasian studies	-	-	5	5	5		0.0%
Others in Eastern, Asiatic, African, American and Australasian languages, literature and related subjects	310	300	340	320	75	-75.8%	-76.6%
Historical and philosophical studies	16,755	16,010	17,845	16,515	16,700	-0.3%	1.1%
Broadly-based programmes within historical and philosophical studies	175	125	150	115	15	-91.4%	-87.0%
History by period	8,670	8,705	9,360	8,895	9,205	6.2%	3.5%
History by area	255	260	285	220	265	3.9%	20.5%
History by topic	1,510	1,395	1,950	1,530	1,540	2.0%	0.7%
Archaeology	1,070	1,020	1,190	1,030	970	-9.3%	-5.8%
Philosophy	2,460	2,430	2,665	2,545	2,595	5.5%	2.0%
Theology and religious studies	1,875	1,685	1,910	1,925	1,920	2.4%	-0.3%
Others in historical and philosophical studies	740	385	330	245	195	-73.6%	-20.4%
Creative arts and design	39,035	41,720	45,825	43,655	46,505	19.1%	6.5%
Broadly-based programmes within creative arts and design	50	10	25	5	5	-90.0%	0.0%
Fine art	4,450	4,555	5,030	4,515	4,600	3.4%	1.9%
Design studies	16,605	16,955	18,675	16,930	17,745	6.9%	4.8%
Music	4,950	5,530	6,200	6,530	7,160	44.6%	9.6%
Drama	5,505	6,315	6,855	6,720	7,340	33.3%	9.2%
Dance	690	920	1,080	1,240	1,215	76.1%	-2.0%
Cinematics and photography	3,780	4,395	4,745	4,865	4,725	25.0%	-2.9%

	2003/04	2004/05	2005/06	2006/07	2007/08	Percentage change 2003/04 to 2007/08	Percentage change 2005/06 to 2007/08
Crafts	420	510	495	400	295	-29.8%	-26.3%
Imaginative writing	555	755	960	970	1,035	86.5%	6.7%
Others in creative arts and design	2,035	1,770	1,755	1,480	2,390	17.4%	61.5%
Education	14,010	15,270	16,620	16,755	21,380	52.6%	27.6%
Broadly-based programmes within education	10	20	40	25	80	700.0%	220.0%
Training teachers	8,450	8,890	9,100	8,860	13,000	53.8%	46.7%
Research and study skills in education	115	100	215	170	160	39.1%	-5.9%
Academic studies in education	3,740	4,215	5,295	6,260	6,720	79.7%	7.3%
Others in education	1,695	2,045	1,970	1,430	1,420	-16.2%	-0.7%

- 1 The Universities and Colleges Admissions Service (UCAS), provides a central service for applicants to most full-time undergraduate courses in UK higher and further education institutions. See www.ucas.ac.uk.
- 2 See for example Figure 3 in *Demand for Higher Education to 2029, HEPI Report Summary 39* Higher Education Policy Institute, December 2008
- 3 Ramsden B (2005) DfES Research report 676, London, Department for Education and Skills
- 4 In earlier years, applicants had been able to make up to six choices: however, in 2008 and 2009, that number has been reduced to five (except for clinical subjects where it remains at four). It follows that the average number of choices made reduced from 5.09 to 4.33, and therefore most institutions saw a reduction in the number of applications they received between 2007 and 2008
- 5 Applicants through the Nursing and Midwifery Admissions Service were first included in UCAS statistics in 2008
- 6 Excluding UK unknown, Isle of Man and Channel Islands
- 7 It is important to note that comparisons across time should be regarded as only approximate because of changes in subject definitions
- 8 Inevitably, mapping institutions across this period of time cannot be comprehensive because of mergers, transfers between the FE and HE sectors etc
- 9 Available from the OFFA website: www.offa.org.uk
- 10 *Access agreement monitoring outcomes for 2006-07*, Office for Fair Access (January 2008) 2008/01
- 11 Student Loans Company Statistical First Release 01/2007, June 2007
- 12 Student Loans Company Statistical First Release 04/2007, November 2007
- 13 *University guide* published as a supplement to *Education Guardian*, 12 May 2009
- 14 For this purpose we have used those accepting 100 or more undergraduate higher education students in 2008/09 through UCAS
- 15 *Access agreement monitoring outcomes for 2007-08*, Office for Fair Access (March 2009) 2009/02
- 16 Student Loans Company Statistical First Release 05/08, 27 November 2008
- 17 http://www.hesa.ac.uk/index.php?option=com_content&task=view&id=1429&Itemid=141
- 18 Adjusted to 2004/05 prices using the GDP deflator
- 19 Excluding UK unknown, the Channel Islands and the Isle of Man
- 20 Excluding UK unknown, the Channel Islands and the Isle of Man
- 21 Excluding UK unknown, the Channel Islands and the Isle of Man



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Universities UK

Woburn House
20 Tavistock Square
London
WC1H 9HQ

telephone

+44 (0)20 7419 4111

fax

+44 (0)20 7388 8649

email

info@UniversitiesUK.ac.uk

web

www.UniversitiesUK.ac.uk

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