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Research Briefing

By Paul Bolton

25 March 2025

Higher education student numbers

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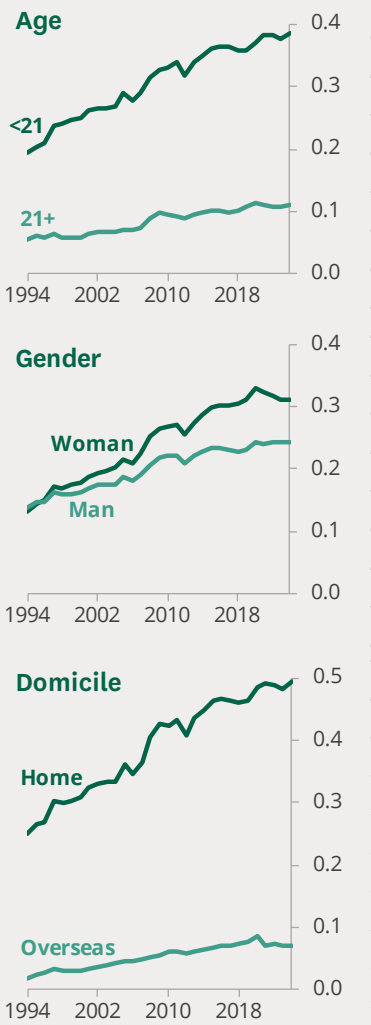
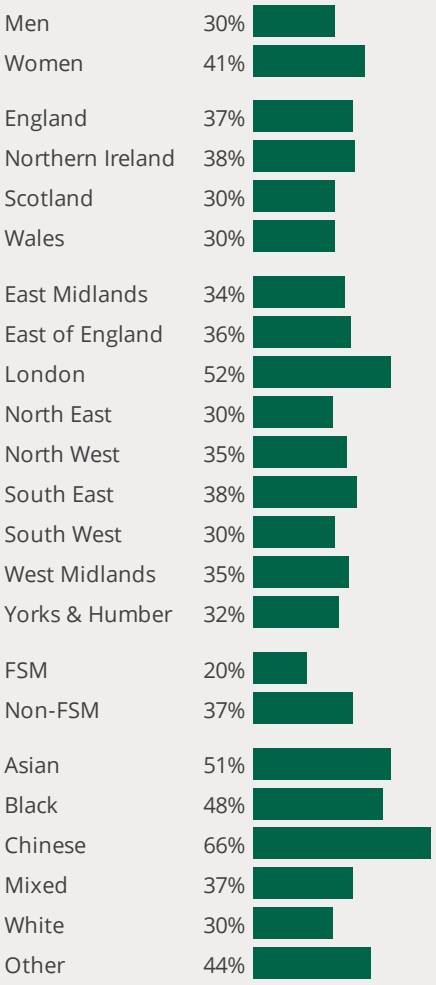
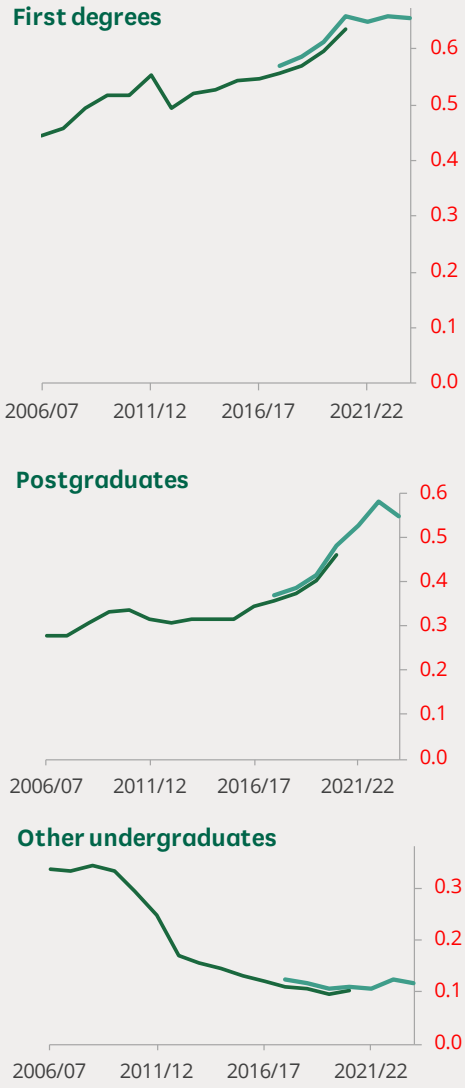


SUMMARY

18 year old entry rates Through UCAS (2024)



1st year students in the UK (millions)



Headline student numbers have increased to new record levels in recent years following a short dip related to the 2012 reforms in the sector. There have been continued increases in entry rates for different groups of students, including those from disadvantaged areas/backgrounds where rates have also hit new record levels.

However, headline numbers tend to focus on full-time undergraduates and there are ongoing concerns about student numbers outside this group where trends have not been so positive. This includes part-time undergraduates, particularly those not studying first degrees, some postgraduate students, EU students, mature students and some disadvantaged groups.

There was particular concern about the impact of the coronavirus pandemic on student numbers, especially those from overseas.

Total student numbers

- In 2023/24 there were 2.90 million students at UK higher education institutions.
- Most full-time students are studying first degrees. There are proportionately more overseas students studying postgraduate courses.
- Growth in the student population since 2020 has been driven by increases in overseas students on postgraduate taught courses, Over the 15 years the number of entrants to 'other undergraduate' courses has fallen by almost two-thirds. The large majority on these courses are part-time UK students.

Applications to full-time undergraduate courses

- There were 758,000 applications for full-time undergraduate places through UCAS in 2024, up by 500 on 2023 but below the record level from 2022. Almost 565,000 of these applicants were accepted.
- Applicant numbers fell in 2012 with larger falls among those who faced fees of up to £9,000. The total was 7.6% down.
- Applicants reached new record highs in 2020, 2021 and 2022. There was concern that limits on travel and the type of teaching possible with coronavirus restrictions would lead to a large drop in student numbers.
- The number of UK applicants increased in each year from 2019 to 2022, driven by an increased number of 18-year-olds in the population.
- Brexit meant new EU students faced higher fees from 2021 and were no longer eligible for fee loans. Applications from EU students fell by 40% in 2021. The number of EU students starting full-time undergraduate courses fell by 68% between 2020 and 2024 to its lowest level since 1994.

Proportions of young people going to higher education

- The higher education entry rate among UK 18-year-olds increased from 24.7% in 2006 to 30.7% in 2015 and peaked at 38.2% in 2021. It fell back to 36.4% in 2024.
- 49% of state school pupils from England had started higher education by age 25 in 2022/23. The rate among women was substantially higher than among men.

- The proportion of young people from England who were eligible for free school meals (FSM) that go on to higher education doubled between 2005/06 and 2021/22. However, the gap in entry rates with other young people has grown over the last decade.
- Just 14% of White British boys eligible for FSM had started higher education by age 19 in 2022/23. Rates were higher in all other major groups. More than half of all Black and Asian pupils eligible for FSM had started higher education by age 19 compared to 19% of White FSM eligible pupils

Scope of this briefing

This briefing looks at trends in the size of the student population, changes in the number of entrants overall and for different types of students/courses and entry rates for different groups and areas.

It replaces Entrants to higher education and HE in England from 2012: Student numbers which looked in detail at policy around student number control and focussed on annual changes in student numbers, especially in the period leading up to and just after the 2012 higher education funding reforms. Those papers will no longer be updated. The data in this paper will be regularly updated.

Readers may also be interested in the following briefing papers:

- International students UK higher education
- Higher education finances and funding in England
- Tuition fees in England: History, debates, and international comparisons
- Part-time undergraduate students in England
- Support for students with mental health issues in higher education in England
- Support for disabled students in higher education in England
- Student loan statistics
- The value of student maintenance support
- Support for postgraduate students in England

1 Snapshot 2023/24

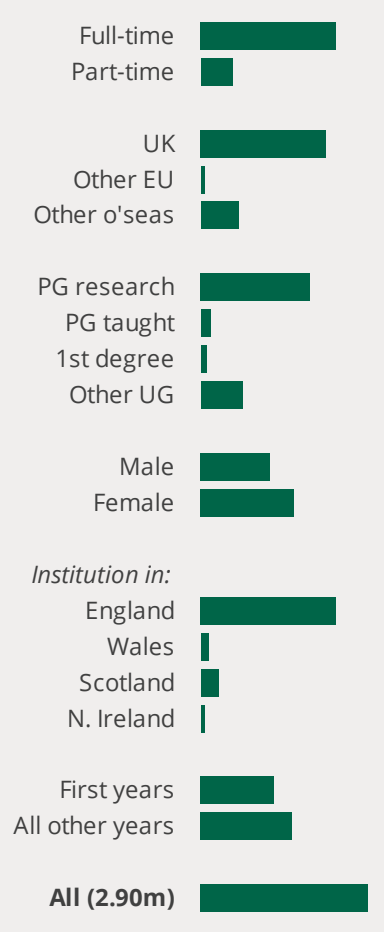
In academic year 2023/24 there were 2.9 million students at UK higher education institutions.[1] This covers all years, modes, levels and domiciles. A full breakdown is given in the table below and a summary by broad category is shown the table. Key points are:

- Most full-time students are studying first degrees.
- Home students on full-time first degrees made up almost half of the total student population.
- There are proportionately more overseas students studying postgraduate courses
- Overseas students are much more likely to be full-time
- EU students are more likely than other overseas students to be studying at undergraduate level
- The large majority of 'other undergraduate' courses are taken part-time by home students

Snapshot of students at UK universities
2023/24, thousands

	UK	EU	Other overseas	**Total**
Full-time				
First degree	1,420	46	227	**1,695**
Other undergraduate	55	1	8	**64**
Postgraduate research	47	7	36	**90**
Postgraduate taught	119	14	355	**488**
Total full-time	**1,640**	**68**	**627**	**2,338**
Part-time				
First degree	198	1	4	**204**
Other undergraduate	85	1	8	**94**
Postgraduate research	25	2	3	**29**
Postgraduate taught	220	4	15	**240**
Total part-time	**528**	**8**	**30**	**567**
All modes				
First degree	1,618	47	232	**1,899**
Other undergraduate	139	2	16	**158**
Postgraduate research	71	9	39	**120**
Postgraduate taught	340	18	370	**728**
Total all modes	**2,168**	**75**	**657**	**2,904**

Source: HESA, Higher Education Student Statistics: UK, 2023/24



[1] These figures do not include higher education students who study at further education colleges.

2 Full-time undergraduates applying through UCAS

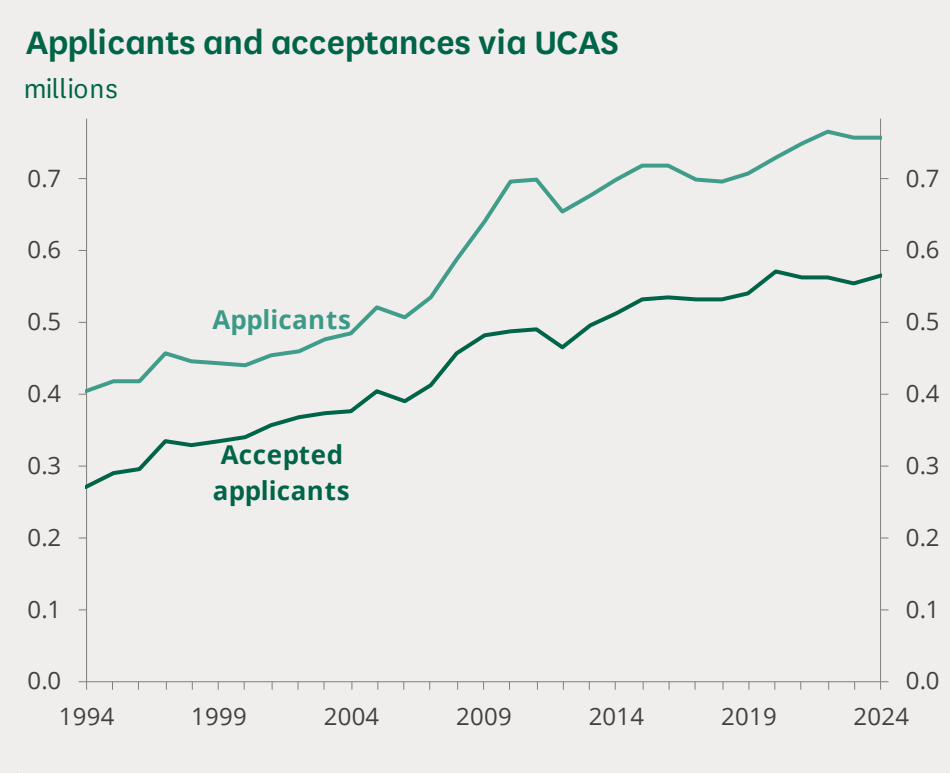
2.1 All applicants and entrants

Applicants through UCAS (thousands)

	Applicants	Accepted applicants
1994	405	271
1995	419	291
1996	418	296
1997	459	336
1998	446	330
1999	443	335
2000	442	340
2001	454	358
2002	461	368
2003	476	374
2004	486	378
2005	522	405
2006	506	391
2007	534	413
2008	589	457
2009	640	482
2010	697	487
2011	700	492
2012	654	465
2013	677	496
2014	700	512
2015	718	532
2016	718	535
2017	700	534
2018	696	533
2019	706	541
2020	729	570
2021	750	562
2022	767	563
2023	757	554
2024	758	565

Source: End of cycle data resources 2024 (and earlier), UCAS

There were 757,600 applicants[2] for full-time undergraduate places through UCAS in 2024, 564,900 of whom were accepted. The table opposite summarises trends since UCAS was created following the reform of the sector in the early 1990s. The same data is illustrated in the chart below. These are annual numbers of applicants and entrants so show changes in the *flow* of students, not the overall population.



Source: End of cycle data resources 2024 (and earlier), UCAS

There have been underlying increases in applicants and acceptances (averaging 2.1% and 2.5% a year respectively) since the mid-1990s. The total number of home applicants via UCAS rose in each year between 1999 and 2005. There was a 4.1% drop in 2006, the first year of 'variable' fees. The drop in 2006 was greater than that seen in 1998 -the previous change to tuition fees. Both were preceded by relatively large increases in applications.

[2] Includes 5,360 applicants with no applications in 2024 and similar numbers in 2023 and 2024. Typically, these are applicants who apply during clearing, but do not submit an application to a provider. The 2022 and later data on acceptances in the rest of this paper exclude this figure.

There was a return to the upward trend in 2007; applicant and acceptance numbers reached new records which were exceeded in 2008, 2009 and 2011.

Applicant numbers fell by 7.6% in 2012 with larger falls among those facing fees of up to £9,000. The number of accepted applicants was down by 5.5%.

Applicant numbers bounced back somewhat in 2013. They rose again in 2014 but did not beat their 2011 peak until 2015. This remained the record high for *applicants* until 2020. There were further record highs in 2021 and 2022, but subsequent totals have been below the 2022 level.

UCAS handles the large majority of applications to full-time undergraduate courses at UK universities. The main 'gap' is in Scotland where around one-third of such courses are in further education colleges which are not covered by UCAS.

The number of accepted applicants bounced back from their 2012 dip more quickly. A record 496,000 were accepted in 2013. New records were set for acceptances in each year to 2016 and then in 2019 and 2020. There was a 1.5% fall in 2021 a 0.2% increase in 2022 and a 1.2% fall in 2023. The 2023 number of accepted applicants was the lowest since 2019. Acceptances increased by 1.9% in 2024 to their highest level since 2020.

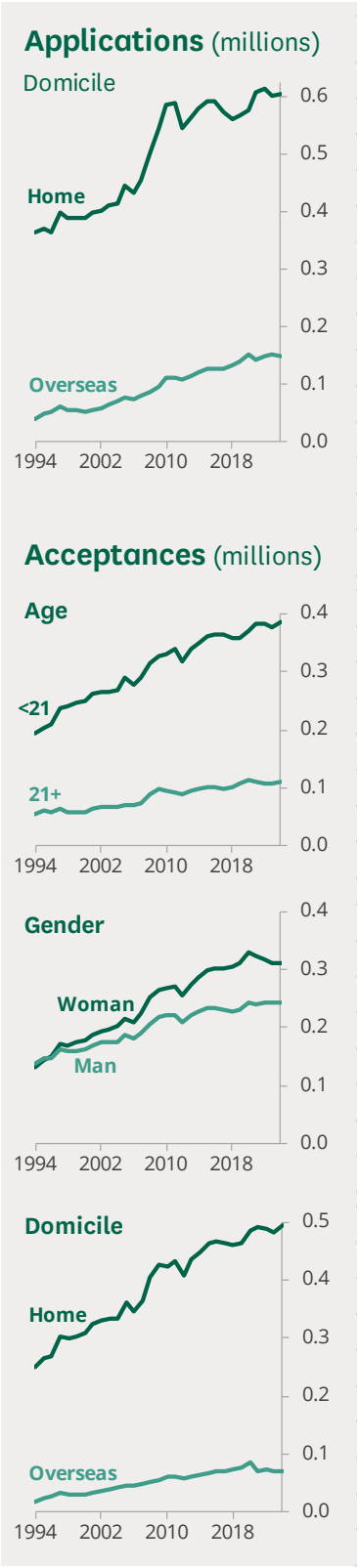
Much more detail on annual changes in these numbers for the period 2008 to 2014 and analysis of the impact of the 2012 funding changes is included in the paper HE in England from 2012: Student numbers.

Appendix 1 to this paper looks in detail at how the pandemic affected the number and pattern of applicants and acceptances in 2020 and 2021.

The coverage of UCAS figures has increased over time as more courses have come under their remit. In general the impact is quite small, but some changes in coverages, such as the inclusion of ex-Nursing Midwifery Admission Service courses in 2008 had a much greater effect. These data are not adjusted in any way for these changes.

UCAS figures are published more frequently than others in this paper and are more up-to-date. Their figures can be found at: www.ucas.com/data-and-analysis along with a timetable of when new figures are published.

2.2 Breakdown by student characteristics



Source: End of cycle data resources 2024 (and earlier), UCAS

The linked reference table for this paper gives a breakdown of applicants and acceptances by broad group. These are also illustrated in summary form below and opposite.

Growth in applicants driven by non-EU overseas students

	Thousands						Change	
	1994	2000	2010	2020	2023[a]	2024[a]	*1994-2024[a]*	*2010-2024[a]*
Applicants -Domicile								
Home	365	389	587	577	600	603	*+64%*	*+2%*
EU	19	24	47	53	23	22	*+25%*	*-51%*
Other overseas	21	29	63	99	129	127	*+507%*	*+104%*
Total	**405**	**442**	**697**	**729**	**752**	**752**	***+86%***	***+8%***
Acceptances								
Female	133	178	267	329	311	312	*+134%*	*+16%*
Male	138	161	220	242	243	244	*+76%*	*+11%*
Age (home accepted applicants only)								
Under 21	195	251	329	371	377	385	*+93%*	*+15%*
21+	56	58	96	114	106	110	*+89%*	*+11%*
Domicile								
Home	251	309	425	485	483	495	*+92%*	*+14%*
EU	8	14	26	32	11	10	*+28%*	*-59%*
Other overseas	11	17	37	53	61	60	*+437%*	*+64%*
Total	**271**	**340**	**487**	**570**	**554**	**565**	***+105%***	***+14%***

(a) Applicant data from 2022 excludes around 5,000 applicants with no applications (typically those applying through Clearing who do not submit an application to a provider). They are included in earlier data so the 2022 and later figures are not directly comparable.

Source: End of cycle data resources 2024, UCAS

Key points to note are:

- The number of (all) overseas applicants has increased at a faster rate than those from the UK across the whole period.
- The growth in EU applicants ceased after the Brexit referendum and the number of accepted applicants fell by 50% in 2021 when higher fees and an end to loans came in for new EU students.
- The drop in overseas applicants in 2012 was much smaller and more short-lived than among potential UK students
- There were more women accepted through UCAS than men for the first time in 1996. Since then, the gap has generally grown and was 68,000 students or 28% more women than men in 2024.
- The number of acceptances among older (21+) students has grown at a similar rate to that of younger (<21) applicants since 1994.

- The numbers of older people accepted did not increase over most of the last decade. It was only between 2017 and 2020 that their numbers increased consistently.

2022

2022 marked a partial return to 'normal' as far as examinations and application to university was concerned. The briefing paper A levels, Scottish Highers, and university admissions 2022 gives more details of exam grading and applications and admissions to university.

While the total number of acceptances increased by 0.2%, the number among home (UK) students fell 0.5% its 2021 record high. The number of home 18 years olds accepted onto a course increased by 0.7%, buoyed by the increased size of the population cohort, while the number of older home entrants fell. The number of female accepted applicants fell by 1.2%, while the number of males increased by 2.1% to a record level. EU acceptances were down again, by 29% to their lowest level since 1994. Other overseas acceptances were up by 16% to their sixth consecutive record level.

2023

The total number of acceptances through UCAS fell by was down by 1.5%. The number of accepted UK applicants was down by 1.3% to its lowest level since 2019. EU acceptances were down by a further 7.0% and other overseas acceptances down by 2.3%. Acceptances among home 18 year olds were down by 5,600 or 2.0%, the first fall from this group since 2018. The next section contains data on the 18 year old entry rate The number of UK students accepted to nursing courses fell by 11%.[3]

Home applicants in England who start in 2023 were the first cohort to come under the new student finance arrangements. Details of the changes to new students and the impact on loan repayments are given in the Library briefing The Post-18 Education and Funding Review: Government conclusion.

2024

The number of accepted applicants increased by 1.9% in 2024 to its second highest ever level (after 2020). There were falls of 2.3% from both the EU and other overseas countries. Home acceptances were up by 2.5% to a record high of 495,000. The number of home 18 year olds accepted was up by 2.9% to a record total of 279,550.[4] This increase has again been boosted by a rise in the number of 18 year olds in the population.

[3] UCAS, Undergraduate end of cycle data resources 2023

[4] UCAS, Undergraduate end of cycle data resources 2024

2025

The total number of applicants in the 2025 cycle up to 29 January 2025[5] was up by 1% to just over 600,000. This was still somewhat lower than the numbers at the same stage in 2021 and 2022. Home applicants were up by 0.6%, international applicants were up by 2.7%.[6]

The number of Home 18 year olds applying was a new record high, but this was due to increases in the 18 year old population, not in the application rate. The number of home applicants aged 21 or older fell by 6.4%. The number of home applicants from the most deprived quintiles (the most deprived 40% of areas) change very little while there were increases in applicants from each of the three quintiles with lower levels of deprivation.[7]

5 This is the 'equal consideration' deadline. All applications received by this date are considered equally by providers. Around 80% of applications are normally received by this date. Later applications can be made through the main application service to 30 June. Later applications are processed through Clearing.

6 UCAS, 2025 cycle applicant figures -29 January deadline

7 UCAS, 2025 cycle applicant figures -29 January deadline

3 Application and entry rates

While total student/entrants numbers tell us about the overall size of the student population they tell us less about the level of demand from different groups of potential students or how successful they are at getting into university. Rates based on the size of these different groups help us to do this and are particularly important when comparing groups of different sizes or changes over time in a group that has increased or decreased in size.

3.1 UCAS entry rates

UCAS definitions of disadvantaged students

UCAS uses a number of different classifications of disadvantage among 18 year olds for its entry rates. These include where people live (POLAR4 classification of levels of young HE participation) and proxy measures for family income -whether the student was eligible for free school meals (FSM) or their family received a means-tested benefit while they were at school. According to UCAS:

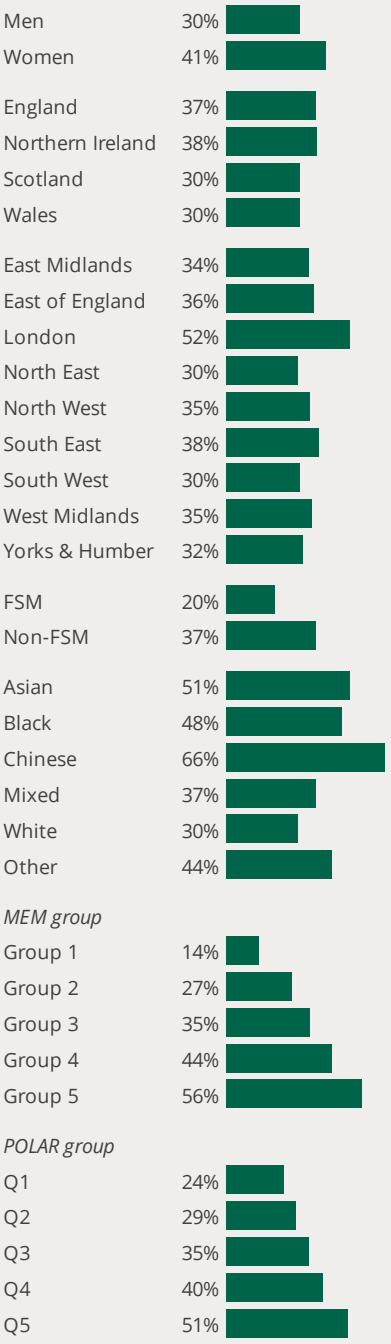
> This is important because there is a wide variation in entry rates across combinations of these groups … Entry rates are used in these calculations because they directly measure the level of representation of different groups in HE, allowing the identification of those who are 'disadvantaged' in terms of their entry rate to university.

In more recent year UCAS has combined different measures of disadvantage/equality for students from England into a single measure:

> …a range of equality dimensions (sex, ethnic group, POLAR3, secondary education sector type, and FSM status) are combined to create an equality measure, which can then be estimated for pupils who were aged 18 in later years.
>
> The methods used seek to predict whether an individual enters higher education or not when aged 18, using only the equality characteristics and their interactions with each other. The resulting predicted entry probability, termed the multiple equality measure (abbreviated to MEM), is based on 2006 to 2010 data, and is used to aggregate pupils into groups, where group 1 contains those least likely to enter higher education ('most disadvantaged' in this context), and group 5 contains those most likely to enter higher education ('most advantaged' in this context). Entry rates can then be calculated for each group and the trend assessed between groups across time.

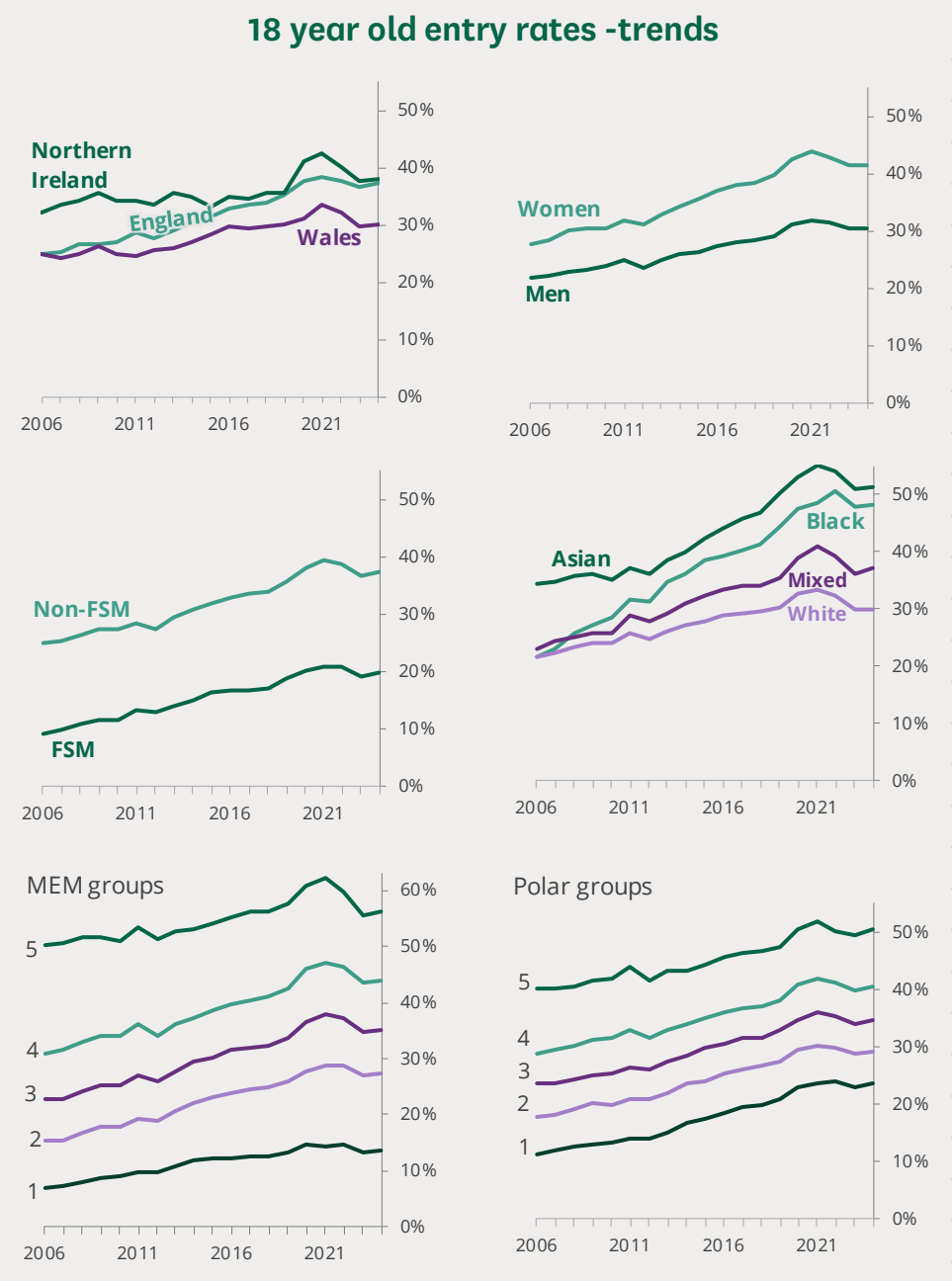
18 year old entry rates

UCAS entrants 2024



Source: UCAS, End of cycle data resources 2024

UCAS has estimated entry rates for many different groups of students and their figures go back to 2006. Some trends are illustrated below[8] and a snapshot of a wider range of groups is shown opposite. The UK-wide entry rate for 18 year olds was 36.4% in 2024, up on 2023 and around ten points higher than 15 years ago, but lower than rates from 2020 to 2022.



Source: UCAS, End of cycle data resources 2024

Many entry rates reached new record levels after 2012 and set new records for most of the subsequent years to 2021. These include the national 18 year old rate, rates for both men and women, all broad ethnic groups, students formerly eligible for FSM and other disadvantaged groups. There is evidence

[8] Data for FSM, MEM groups and POLAR groups are all for England only

that some gaps between the most and least disadvantaged students increased during the pandemic, but have since fallen.

HE entry rate gaps between the most and least disadvantaged young people have fallen in relative but not absolute terms over the past 18 years. But 2021 saw small increases in the absolute *and* relative size of many of these gaps

Since 2006 the size of the gap between FSM and non-FSM students has fallen in *relative*[9] but not *absolute*[10] terms. The relative gap itself increased slightly in 2016, 2017, 2021 and 2023. It has fallen in other years. The entry rate gap between students from the areas with the highest and lowest levels of historical participation (POLAR groups 5 and 1) has fallen in both relative and absolute terms over time. This was also the case for the most advantaged and disadvantaged MEM groups. While all groups saw entry rates rise in 2020 and 2021 the increases were largest for the most advantaged groups (both POLAR and MEM) so the absolute gap increased in these years. However, in 2022 the entry rate for the most advantaged groups (on both measures) fell, while those for the most disadvantaged continued to increase. Despite the longer term trend, the gaps between the most and least disadvantaged groups still remained substantial in 2024.

UCAS breaks down some of its group entry rates by the 'tariff' level of different universities. There are three tariff groups; high, medium and low and these refer to average grades of students admitted. High tariff institutions where entrants have higher grades are generally considered more prestigious and harder to get into. This type of analysis therefore can shed light on a different aspect of widening participation.

Disadvantaged young people are much less likely to get into the most 'prestigious' universities. Entry rates among those eligible for free meals were around a third of the levels for those not eligible. This gap has increased slightly in 2022 and 2023

In 2024 only 4.0% of 18 year olds from England who were eligible for FSM at school got into one of these high tariff universities. The rate has increased over time from around 1.5% in the period 2007 to 2011 and increased more sharply during the pandemic, before falling back in 2022 and 2023.

The high tariff entry rate for the non-FSM group was much higher at 12.7% in 2024. The relative gap in entry rates between the two groups has fallen over time; in 2006 the non-FSM group were almost six time as likely to go to a high tariff university. This fell to below four times as likely in 2015 onwards and just over three times as likely in 2020, 2021 and 2024. However, the absolute gap increased from six percentage points in 2012 to more than nine points in 2021 and just under nine points in 2024.[11]

UCAS had produced a sector-level data explorer for the final 2023 cycle figures. It has also produced a provider-level version which includes analysis by sex, area background and ethnic group.

UCAS produces data on 18 year old entry rates by Parliamentary Constituency (currently up to 2023 for the pre-2024 constituency boundaries) which are illustrated in the map on the following page.

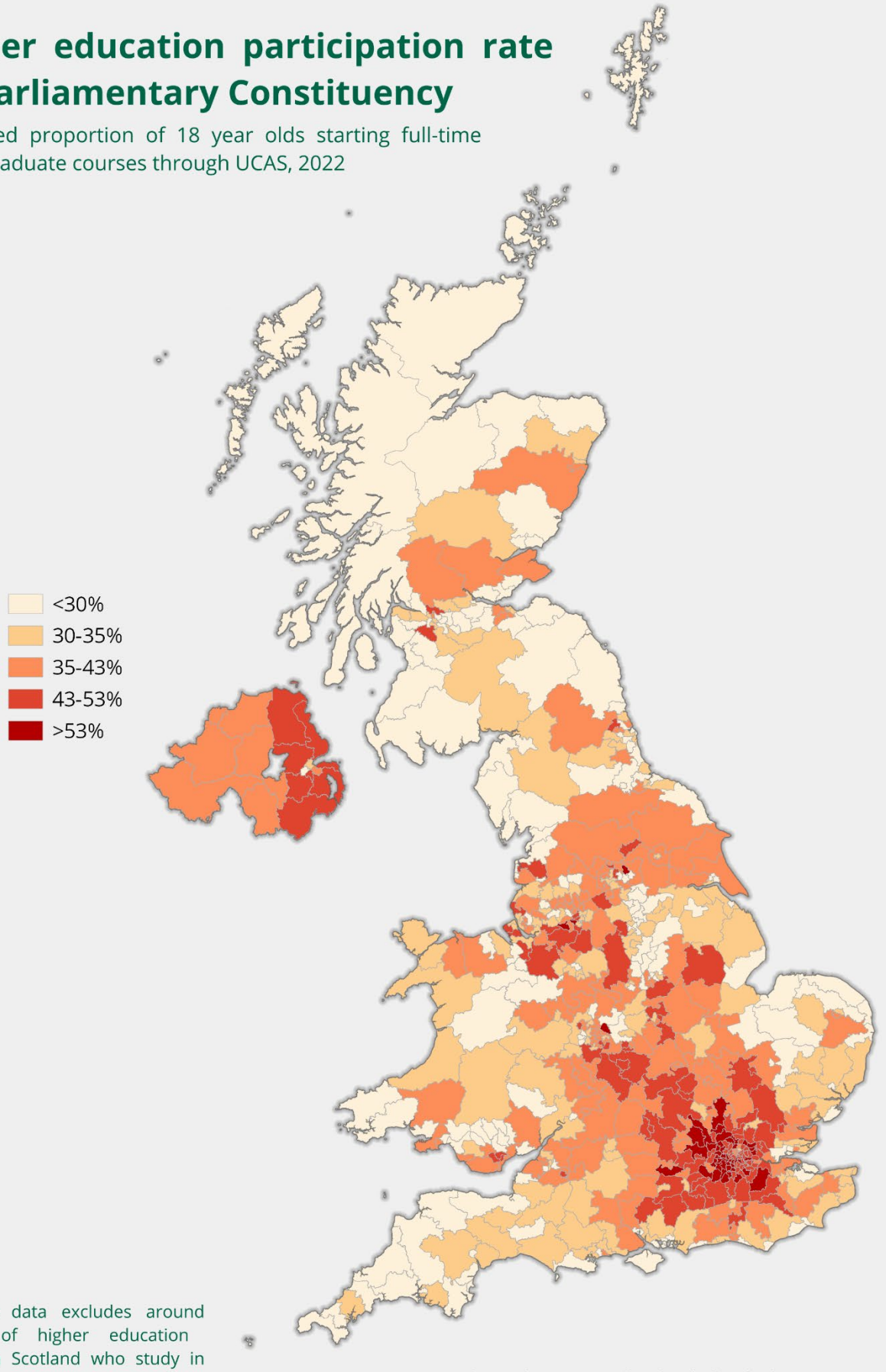
9 How many times greater the entry rate is for non-FSM students.

10 The difference (non-FSM minus FSM entry rates) in percentage point terms

11 UCAS, End of cycle data resources 2024

Higher education participation rate by Parliamentary Constituency

Estimated proportion of 18 year olds starting full-time undergraduate courses through UCAS, 2022



Note: This data excludes around one-third of higher education students in Scotland who study in further education colleges.

Source: UCAS Undergraduate sector-level end of cycle data resources

3.2 Non-UCAS data on entry rates

The Department for Education (DfE) publishes annual participation rates for England. The Higher Education Initial Participation Rate[12] (HEIPR) was first produced to measure progress against the last Labour Government's 50% higher education aspiration. Trends in the HEIPR are illustrated below. A new methodology was introduced in 2006/07.

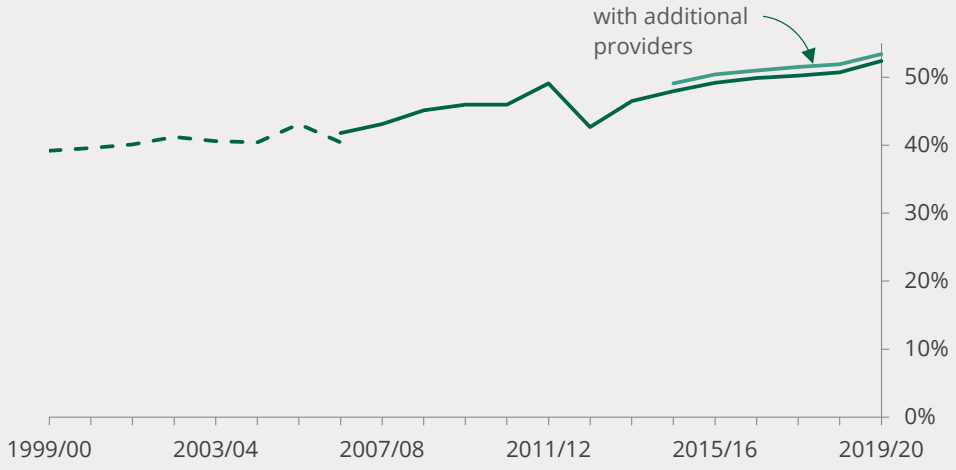
Higher Education Initial Participation Rate

The overall level peaked initially at 49.1% (of those aged under 30) in 2011/12. It fell to just under 43% in 2012 and has risen subsequently to new highs in 2015/16, and then each year to 2018/19. It passed 50% in 2017/18 the level of the Labour Government's original aspiration and reached 50.7% in 2018/19. Participation at additional providers[13] was included in the measure in the latest release and this series was backdated to 2014/15. This increases participation by just over one percentage point and takes the 2019/20 HEIPR to 53.4%.

In 2019/20 the overall HEIPR was just over 53%; 61% for women and 46% for men. The rate among those aged under 21 was 46% and if extended to all entrants aged 60 or less it was 59%

HE participation above 50% since 2017/18

HEIPR England: 17-30 year olds starting HE for the first time



Source: Participation measures in higher education 2019/20, DfE

Further breakdowns of the HEIPR by age and mode can be found in the DfE publication Participation Rates in Higher Education: 2006 to 2020.

[12] This measure covers 17-30 year old English domiciled first-time participants in HE at UK HE Institutions, and at English, Welsh and Scottish Further Education Colleges. The HEIPR is a sum of the participation rates for each age from 17 to 30 inclusive. or each age from 17 to 30, the initial participation rate is calculated as the fraction of the academic year population that are initial entrants. These rates are added to create the total HEIPR.

[13] Those who do not receive recurrent public funding

49.0% of the cohort aged 15 in 2012/13 had started higher education by age 25. Rates were as high as 54.9% for females and 61.4% for those from London.

Cohort-based Higher Education Participation measure

In 2023 the DfE introduced a new participation measure the Cohort-based Higher Education Participation (CHEP) measure. This tracks a particular cohort of 15 year olds state school pupils from England to see what proportion enter higher education. The main focus of this measure is participation at age 25. The latest data on this indicator is for the 2012/13 cohort (of 15 year olds), 49.0% of whom had started higher education by age 25. This rate was 38.8% for the 2001/02 cohort and has increased for each subsequent cohort.[14]

The measure also looks at cohort entry at other ages. The latest figures for the entry rate by age 20 are for the 2017/18 cohort, 49.1% of whom had started higher education by this age. The latest data for entry by age 30 are for the 2007/08 cohort of 15 year olds and is 45.7%. Entry rates by age 25 were 54.9% for females and 43.2% for males. They also varied by region from 44.8% in the South West to 62.2% in London.[15]

Higher education entry rates by free school meal eligibility

The DfE also publishes higher education entry rates by free school meal (FSM) eligibility. This covers young people who were in the state sector in England only. 29.0% of those eligible for FSM aged 15 had entered HE at by age 19 in 2022/23. This was more than double the 14.2% rate in 2005/06, but down slightly from the peak of 29.2% in 2021/22. This was the first time this rate has fallen on a series going back to 2005/06

The rate among the non-FSM group was 49.8% in 2022/23 this has continued to increase in each of the last 15 years. The absolute gap between these rates decreased from 19 percentage points in 2005/06 to below 17 points in 2013/14. It has increased since then and reached 20.8 points in 2022/23, the highest ever level on this series which goes back to 2005/06.[16]

When the FSM entry rate data for 2022/23 are broken down by gender and ethnicity they show:

- 14% of White British boys eligible for FSM (so-called 'white working class' boys) had started HE by age 19. The lowest rate of any major group.
- The gender gap was largest for Black Caribbean students; 23% (boys) v 45% (girls) among FSM eligible pupils and 37% v 58% non-FSM eligible pupils.
- Almost 64% of girls from Asian ethnic backgrounds eligible for FSM started HE by age 19, the highest rate among girls from any broad ethnic group.
- More than half of all Black and Asian pupils eligible for FSM had started by HE age 19 compared to 19% of White FSM eligible pupils

14 DfE, Participation measures in higher education academic year 2022/23
15 DfE, Participation measures in higher education academic year 2022/23
16 DfE, Widening participation in higher education: 2022/23

The higher education entry rate among former FSM pupils varied considerably across local authorities from around 12% in Herefordshire and South Gloucestershire to than 50% in 15 London boroughs, the highest of which was Westminster at 64%. In general FSM entry rates were much higher in London and above average in some other large urban areas. The FSM/non-FSM gap was highest in Reading (37 percentage points), Buckinghamshire and Wokingham (both 35 points) and below ten points in five London boroughs.

Full details of these rates and other indicators for disadvantaged groups can be found in the DfE's Widening participation in higher education: 2022/23

3.3 International comparisons of entry rates

The OECD produces entry rates for tertiary (higher) education for OECD and partner countries. These are similar to the Higher Education Initial Participation Rate figures covered earlier as they look at first time entry only and sum rates for individual ages to produce an overall figure, here for those aged under 25. The latest data are for 2022 when the first-time entry rate for students aged under 25[17] was 58% in the UK. This rate combines individual age entry rates so another way to think about it is that if current patterns continue 58% of people will start higher education before they reach 25. The rate for women was 65% compared to 51% for men. More young women than young men started higher education in all OECD countries.

The UK's figure was above the OECD average of 52% and above rates in the US (43%), Germany (49%) and Italy (50%). Countries with higher rates than the UK included Belgium (62%), Spain (64%), Poland (63%) and Greece (69%). There are no estimates for many larger economies including France, Australia, Japan and Korea. However, entry rates for Batchelor's level/equivalent courses in Australia (59%) and Korea (65%) were above the UK's 53%.[18]

3.4 Office for Students TUNDRA measure

In September 2019 the Office for Students introduced a new experimental measure of young participation in higher education: TUNDRA (tracking underrepresentation by area). This uses a broadly similar approach to the POLAR[19] measure produced by the earlier funding council. They both look at local data on participation among young people over several years. This is aggregated to a single measure across the relevant years and assigned to one of five bands or quintiles. Both look at very small geographies -middle-

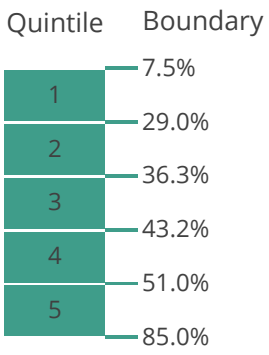
17 Excludes international students

18 OECD (2023), "Education at a glance: Graduation and entry rates", *OECD Education Statistics* (database), https://doi.org/10.1787/f36b1100-en (accessed on 19 February 2023).

19 Participation of local areas

layer super output areas (MSOAs) and equivalents. There are a few key differences:

- TUNDRA covers England only, POLAR is for the UK
- TUNDRA only looks at maintained pupils, POLAR covered all young people regardless of what type of school they attended
- TUNDRA links individual records for pupils aged 16 to higher education records. POLAR compared data on entrants (by area of residence) to estimates of the relevant age group in the local area.



The TUNDRA results are based on pupils who completed their GCSEs between 2010 and 2014 and looks at how many (in each ear) started higher education aged 18 or 19 between 2012/13 and 2017/18. Rates for individual MSOAs varied from 7.5% to 85%. The quintile boundaries are given opposite. More detail can be found at Young participation by area

An analysis by region found that the North East and Yorkshire & the Humber had the higher proportion of areas in the lowest quintile (Q1). Both had more than 25% in this band while London had only just over 1% in Q1. At the other end of the participation spectrum the South West had 11% of areas in the highest participation band at 11% compared with almost 45% of areas in London.[20]

TUNDRA at a lower geographical level

- In September 2020 the Office for Students published TUNDRA at Lower Layer Super Output Area (LSOA). This uses the same data as the original MSOA TUNDRA figures. There are almost 33,000 LSOAs in England. Data for around 1,300 LSOAs is supressed because their estimated population aged 18 or 19 is less than 30. Rates for individual LSOAs varied from 10% to 90%.

[20] *TUNDRA methodology*, OfS

4 Higher Education Statistics Agency data for the UK

Student number data from 2022/23

The release of Higher Education Statistics Agency (HESA) student data for 2022/23 was delayed from January to August 2024 due to the introduction of a new 'data model' requiring significant changes to the way higher education institutions collect and manage their student data.

These changes led to a larger than normal number of 'data quality issues'. These are described in detail in HESA's Higher Education Student Statistics: UK, 2022/23. Those affecting the data in this briefing include a new definition of entrants, with a 'small' impact on overall numbers, inclusion of some 'active' students who were writing-up at the end of the year who would have been excluded in earlier years (around 8,000 all postgraduates), missing data on country of permanent address (up from less than 100 in 2021/22 to around 2,800 in 2022/23), missing entry informatiom for around 2,500 students and incorrect classifications of mode/level of study for some students at some institutions.

The 2023/24 release was the second from the new data model. The quality report concluded that the 2023/24 data was fit for use in official statistics and there had been a general improvement in data quality since 2022/23.

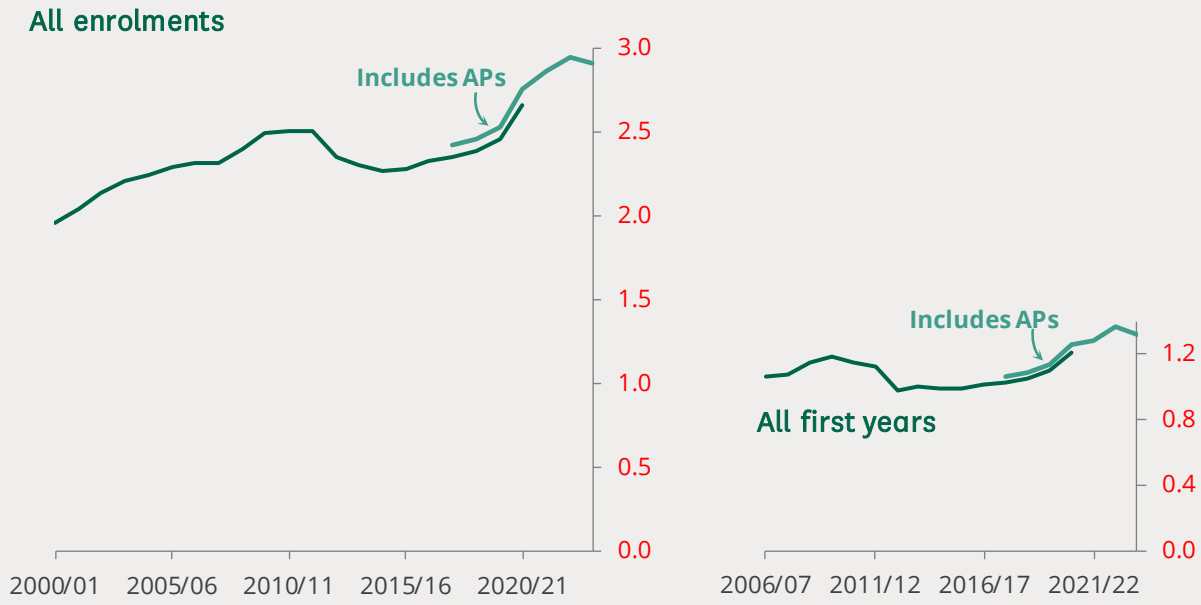
The analysis in this briefing does not adjust for any of the changesfrom 2022/23 or indicate any disontinuity with breaks in series in tables or charts.

All students

In 2023/24 there were 2.9 million students at UK higher education institutions. This was 1.1% lower than in 2022/23, the first fall in total student numbers since 2014/15. Trends are summarised in the charts on the following page.

The Higher Education Statistics Agency extended its coverage of the student population in recent years to cover those at alternative (private) providers. From 2021/22 their data only includes this new wider definition of the sector so there is a break in the data. Figures on the old definition go up to 2020/21 and data on the new definition start in 2017/18. The two series are shown in all relevant charts in this section ('includes APs' is the new series with alternative providers) while tables either only include the new data or have a break with the new series from 2021/22.

Students at UK higher education providers (millions)



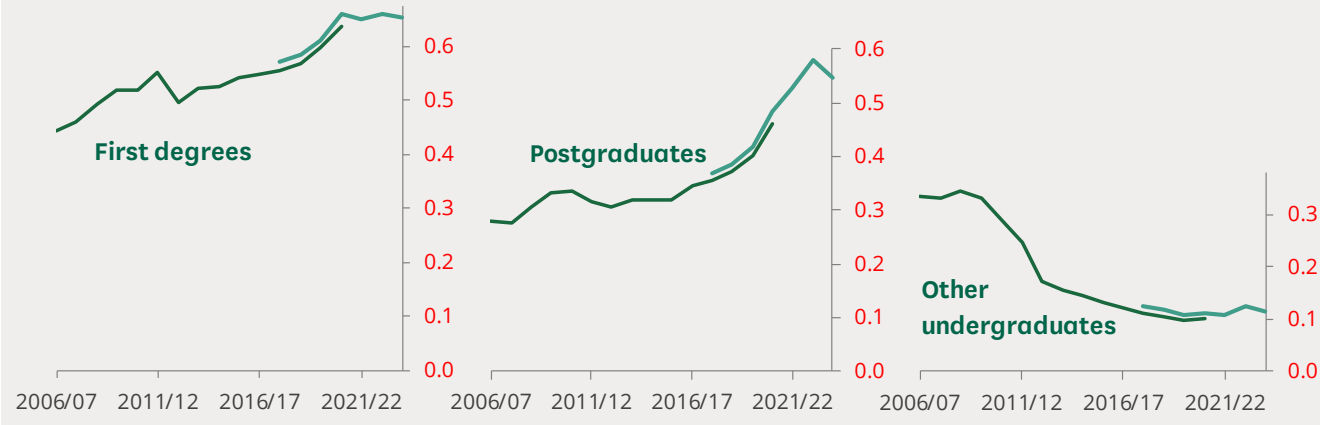
Source: HESA, HE student enrolments by level of study 2019/20 to 2023/24 (and earlier)

Changes in the *stock* of students reflect any underlying shifts in the duration of courses taken and hence the full-time/part-time split rather than just a measure of demand for, and supply of, places. The number of first year students (entrants) is not affected by this. There were 1.32 million first years in 2023/24. Numbers of first years increased in each year from 2014/15 to 2022/23 before falling in 2023/24.

Types of courses and students

The charts below look at changes in entrants to courses of different levels.

Entrants to UK higher education providers by level of course (millions)



Source: HESA, HE student enrolments by level of study 2019/20 to 2023/24 (and earlier)

The decline in entrants up to the middle of the 2010s was due to the fall in 'other undergraduates'. Their numbers fell by 247,000 (72%) between 2008/09 and 2019/20 before increasing somewhat in 2020/21 and 2022/23.

In contrast there were increases in first degree entrants of 143,000 (29%) between 2008/09 and 2020/21, around 5,700 (19%) to postgraduate research and 149,000 (54%) to postgraduate taught programmes. Entrants to postgraduate taught courses increased by 65%, or around 216,000, between 2017/18 and 2022/23, largely due to a large rise in overseas students starting these courses. The increase in entrants to taught postgraduate courses was responsible for most of the total increase in entrants from 2017/18 to 2022/23.

In contrast the fall in entrants (and total student numbers) in 2023/24 was largely due to the drop in those starting taught postgraduate courses. Their number fell by just over 34,000 or 6.2%. There was a similar percentage fall in entrants to other undergraduate courses, while first degree starters fell by less than 1% and entrants to postgraduate research courses increased.

The table below summarises changes in student number by mode and level.

Students at UK higher education institutions
Millions

	2007/08	2012/13	2023/24 (inc. alternative providers)
All years	**2.31**	**2.34**	**2.90**
First years			
First degree	0.46	0.50	0.65
Other undergraduate	0.33	0.17	0.12
Postgraduates	0.28	0.31	0.55
Full-time	0.62	0.67	1.04
Part-time	0.45	0.30	0.27
UK	0.88	0.74	0.89
Overseas	0.18	0.23	0.43
All first years	**1.07**	**0.97**	**1.32**

Source: HESA, HE student enrolments by level of study 2019/20 to 2023/24 (and earlier)

The increase in entrants for all type of courses in 2020/21 suggests that the Covid-19 pandemic and associated lockdowns led to more people starting in higher education. This could be for many different reasons including retraining for a new career, changes to how exams were marked and how providers accepted candidates, or due to the lack of opportunities in the labour market.

'Other' undergraduate courses are generally taken part-time and students on these courses make up a large proportion of total part-time numbers. This means that total part-time entrants have also fallen steeply from 470,000 in 2009/10 to 235,000 in 2019/20; a drop of 50% compared to an increase of

29% in full-time entrants. There were falls in each type of part-time course over this period; 74% in 'other' undergraduates, 22% in first degrees (despite a recent increases), 15% taught postgraduate and 19% postgraduate research courses. Most of the decline in part-time postgraduate taught courses was to 2012/13 and numbers stabilised in the second half of the 2010s.

Part-time entrance numbers were up in 2020/21 by 37,300 or 16%, largely due to an increase in those on part-time taught postgraduate courses. Since then part-time entrants numbers have been relatively stable.

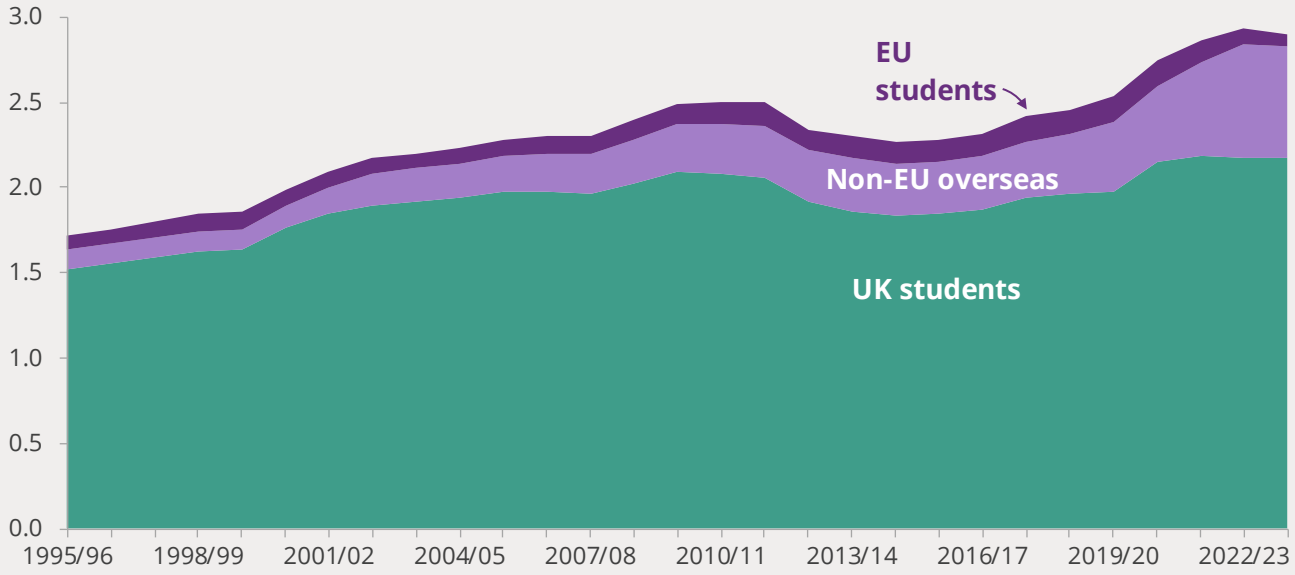
Overseas students

Overseas student numbers increased from just under 200,000 in the mid-1990s to 435,000 in 2011/12. They dipped in 2012/13. There was some recovery up to 2016/17 and larger increases up to 2022/23 taking their total number to almost 760,000. This was or 26% of all students at UK higher education providers.

Overseas student numbers fell by 3.5% in 2023/24 to just over 730,000. This was still the second highest number. Long-term trends in overseas and home students are shown below.

Most recent growth in student numbers has been in overseas students

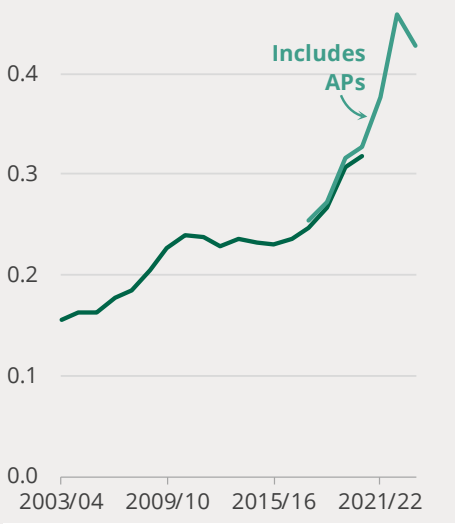
Million of higher education student enrolments by country of permanent address



Note: Includes alternative providers in England from 2017/18

Source: HESA, HE student enrolments by HE provider and permanent address 2023/24 (and earlier versions)

First year overseas students
(millions)



Top 10 countries of origin
Entrants 2023/24

India	107,480
China	98,400
Nigeria	34,525
Pakistan	32,585
United States	12,800
Nepal	9,075
Bangladesh	7,360
Hong Kong	6,830
Malaysia	5,795
Saudi Arabia	4,815

Source: HESA, Top ten EU and non-EU countries of permanent address (excluding the UK) in 2023/24 for HE student enrolments 2019/20 and 2023/24

There was concern that the pandemic would lead to a dramatic fall in overseas students. There was a small fall in new entrants from China in 2020/21, but overall numbers of overseas entrants were up by 4%. They increased by a further 15% in 2021/22 and 22% in 2022/23 before falling by 7% in 2023/24 as illustrated opposite.

The table below/opposite gives the latest data on the countries these students come from. India was in the top position in 2022/23 and 2023/24, replacing China which had been in top place for over a decade. EU entrants at UK higher education providers fell by more than half in 2021/22 and continued to fall in 2022/23 and 2023/24. Some of the key recent trends were:[21]

- Indian student numbers fell by 44% between 2011/12 and 2015/16. They increased steadily for the following few years before rising by around 115,000 entrants (more than 900%) between 2017/18 and 2022/23. Their number fell by 15% (19,100) in 2023/24
- Chinese student numbers are up by 84% since 2011/12, despite a small drop in 2020/21 and 2023/24. Numbers from the US fell in 2020/21, rebounded in 2021/22 (to a record level), fell by 11% in 2022/23 and increased by 6% in 2023/24
- New students numbers from Nigeria fell rapidly in 2015/16 and 2016/17 before stabilising, then increasing by almost 900% (48,000) between 2018/19 and 2022/23. They fell back by 36% (19,300) in 2023/24.
- There was a general drop in entrants from major EU countries between 2011/12 and 2020/21. This sharply accelerated in 2021/22. The largest falls in entrants between 2011/12 and 2023/24 were 75% from Greece, 72% from Cyprus, 63% from Germany, 59% from Romania and 55% from Poland.
- New entrants from the EU were down by 53% in 2021/22, a further 8% in 2022/23 and 2% in 2023/24 to their lowest level since the current higher education sector was formed in 1994.

The Library briefing International students in UK higher education gives more detail and analysis of international student numbers.

Higher Education Statistics Agency (HESA) data covers higher education institutions across the whole of the UK. It includes data on students at all levels, modes and years. It also includes figures on further education courses at higher education institutions, but these are not covered here. Much of their data is freely available online.

[21] HESA, Top ten EU and non-EU countries of permanent address (excluding the UK) in 2023/24 for HE student enrolments 2019/20 and 2023/24 (and earlier versions)

5 Appendix 1: Impact of the pandemic on 2020 and 2021 applicants and entrants

There had been concern that the coronavirus pandemic would lead to a drop in students because of restrictions on travel, moving (some) teaching online and a change to the student experience. Concern focussed on international students who might decide to delay their overseas study, change where they go to university or chose not to study overseas at all.

More detail and background on possible changes to the delivery of courses and surveys of international student intentions can be found in the briefing paper: Coronavirus: Easing lockdown restrictions in FE and HE in England. Readers might also be interested in the paper Coronavirus: Financial impact on higher education.

This section looks in detail at applicants through UCAS in 2020 with a focus on the areas of concern. It also looks at similar data for 2021, but in less detail. Headline figures for these years are included in the rest of this paper.

2020 -applicants

The total number of applicants in 2020 was 728,780, up by around 22,300 or 3.2% on 2019. This was the fourth annual increase in a row and took the total to above the previous record level set in 2015. There was an increase in home applicants of 2.1% and a fall of 0.4% in those from the EU. While home applicants were up, they were still below numbers in 2010-2011 and 2014-2016. Overseas applicants from outside the EU increased by 10,800, or 12.3%, to their highest ever level. Applicants from China were up by around 5,200 or 24%.[22]

The number of new applicants between when lockdown measures were announced (23 March) and 30 June was 17% higher than in the same period in 2019. The increase was 30% among home students with an even larger increase in mature applicants. This suggests that the pandemic *increased* the number of people applying to university. UCAS has said that their surveys of applicants found that almost half of late applicants said the pandemic had increased their likelihood of applying; 8% said it was the main or only reason for applying. They highlight the concern about job prospects and a desire to "work on the front line" as reasons for the increase in mature and nursing applicants.[23]

22 UCAS undergraduate sector-level end of cycle data resources 2020 (Applicants)

23 Keep calm – students still want to study, Wonkhe blog 9 July 2020

The number of home 18 year olds applying increased by 3.0% to a new record level, despite a fall in the 18 year old population of 1.5%. The application rate for 18 year olds increase to a new record of 41.5%.

Home applicant numbers were up by 3.4% for women and 2.4% for men. The largest increases were in older applicants; those aged 25-29 were up by 7%, 30-34 by 11% and those aged 35+ by 6%.

2020 -Accepted applicants

Changes to A-level grading and removal of student number controls

On 13 August students in England received their A levels grades. As public examinations had been cancelled these grades were based on several factors including: centre assessed grades (CAGs), pupil rankings and a computer model or algorithm which took into account the past performance of individual schools. 40% of students were awarded grades lower than their CAGs**.** The subsequent protests resulted in a Government U-turn on the method used to calculate grades and on 17 August it was announced that grades would be awarded based on CAGs.[24] The briefing paper A level results in England and the impact on university admissions in 2020-21 gives much more detail.

The move to CAGs resulted in a jump in the number of higher grades and meant many more students became eligible for places at their first choice provider and on high tariff courses. At the same time as the U-turn on grades the Government also announced that the temporary cap on student numbers in 2020/21 would be lifted to give universities more flexibility over higher education places. The cap was intended to stabilise admissions in 2020. Specifically, it was meant to ensure that more prestigious universities did not replace the (expected) loss in international students with home students at the expense of less prestigious institutions.

[24] Ofqual, Statement from Roger Taylor, Chair, Ofqual, 17 August 2020

The number of accepted applicants increased by 5.4% in 2020 with above average increases among non-EU overseas students, 18 year olds, applicants aged 25+, older students and those from 'disadvantaged' areas

Numbers of accepted applicants

The final number of accepted applicants was 570,475. This was up by 29,200, or 5.4%, compared to 2019. The increase in 2020 was the largest since 2013 and took it to its highest ever number.[25]

The number from the UK was up by 21,100 or 4.5%. This was also the largest annual increase since 2013 and surpassed the previous record level from 2016. The proportion of home 18 year olds who were accepted increased by 2.8 percentage points to a record 37.0%. Numbers from the EU were up by around 600 or 1.7%. Accepted applicants from other overseas countries were up by 7,600 or 16.9% and reached a record high.

Among home applicants there was a large increase in 18 year olds who were accepted; up by 6.8%. This is in large part due to the changes in A level (and Scottish Higher) grading described earlier. Numbers may also be increased by the lack of alternatives for school leavers (particularly employment and travel) due to the coronavirus pandemic restrictions. There were also above average increases in older placed applicants: 9.9% for those aged 25-29 and 11.6% for those aged 30-34.

Acceptances among women from the UK were up by 5.4% compared with a 3.3% increase for men. More women have gone to university than men for many years and this gap continued to grow in 2020.

When the data on 18 year old home applicants is analysed by POLAR quintile[26] the largest increase in 2020 was in those from quintile 1, often referred to as the most disadvantaged. Accepted applicants from this group were up by 9.4% compared to 6.8% overall. Their 'entry rate' increased to a record 23.3% and while the gap by 'disadvantage' has fallen in relative terms, the rate for quintile 1 was still less than half that of quintile 5 (least 'disadvantaged').[27]

Subject

The following charts look at the largest changes in accepted applicants by subject in 2020. The average across all subjects was a 4.5% increase.

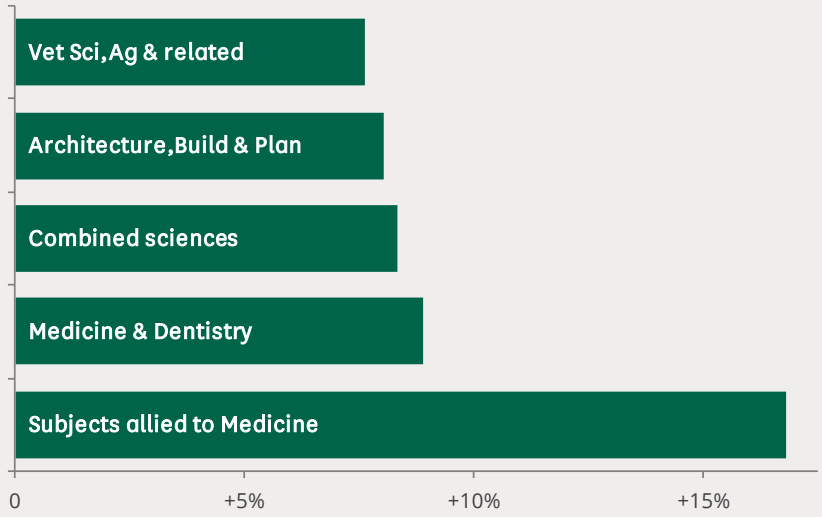
25 UCAS undergraduate sector-level end of cycle data resources 2020 (Acceptances)

26 Areas of the UK are assigned to one of five 20% bands based on past levels of higher education participation. Quintile 1 has the lowest levels and is often referred to as the most 'disadvantaged'.

27 UCAS undergraduate sector-level end of cycle data resources 2020 (Entry rate)

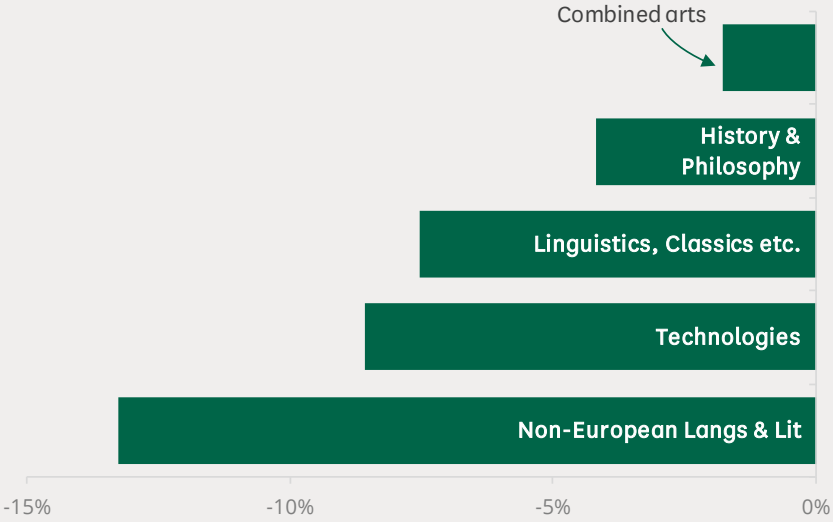
Biggest subject 'winners' in 2020

Annual change in home students accepted through UCAS



Biggest subject 'losers' in 2020

Annual change in home students accepted through UCAS



Source: UCAS undergraduate sector-level end of cycle data resources 2020

One particular feature of the 2020 applications cycle was the increase in applications to study nursing. At the end of 2019 the Government announced additional support for living costs for nursing students from England. This, combined with the impact of the pandemic, from the increased demand for staff, people looking for a secure career and the very high level of esteem the profession is held in, led to a large increase in applicants. Numbers from England were up by just over 7,000 or 18% to a new record high. There were particularly large increases among older applications; those aged 30-34 were up by 28% and those aged 35+ up by 39%. The number of accepted applicants to nursing from England increased by 5,900 or 25%. This was the largest annual increase and took the total to another new record. Again,

there were even larger increases those from older age groups. Accepted applicants aged 35+ increased by 43%. The briefing paper Funding for healthcare students in England gives more background on changes to funding and student numbers.[28]

Widening participation

There was also concern that the pandemic would affect students from disadvantaged backgrounds to a greater extent, due to lack of resources for online learning, particularly IT and space at home to study, and in some cases support from parents and teachers etc. The UCAS report What happened to the COVID cohort? focuses on widening participation. It said:

- The UCAS MEM equality gap narrowed, with the most advantaged English school pupils (group five) 4.23 times more likely to enter HE than the most disadvantaged (group one), compared to 4.40 times in 2019. The gap from 2010 has now narrowed by 26.4%.
- Record numbers of 18 year old acceptances from the lowest participation areas: 29,020 UK students from POLAR4 Q1, 1,645 Scottish students from SIMD Q1, and over 14,000 acceptances of 18 year old English pupils receiving free school meals (FSM).
- Significant growth in mature student acceptances, reflecting a demand for up- and re-skilling as the economy entered recession – the work of doctors, medical professionals, and NHS staff inspired applications to health and social care programmes, including nursing. Mature students (aged 21 or over) significantly increased to 114,440, representing the largest single year growth since 2009.
- Higher tariff providers and medicine courses accepted more disadvantaged students, with the MEM entry rate ratio for English 18 year old applicants to medicine narrowing. Nonetheless, the equality gap remains stark – advantaged students remain nearly 25 times more likely than their disadvantaged peers to be placed on medicine courses.
- A record number of students declaring disabilities, mental health conditions, or specific learning difficulties were accepted into HE. Nearly 4% of UK applicants now flag a mental health condition in their application, with a 10.4% increase in the number of accepted applicants declaring in 2020.
- Regional gaps in entry persist, with 49.1% of London-based 18 year olds entering HE, compared to 32.4% of those from the South West.

Tariff level of providers

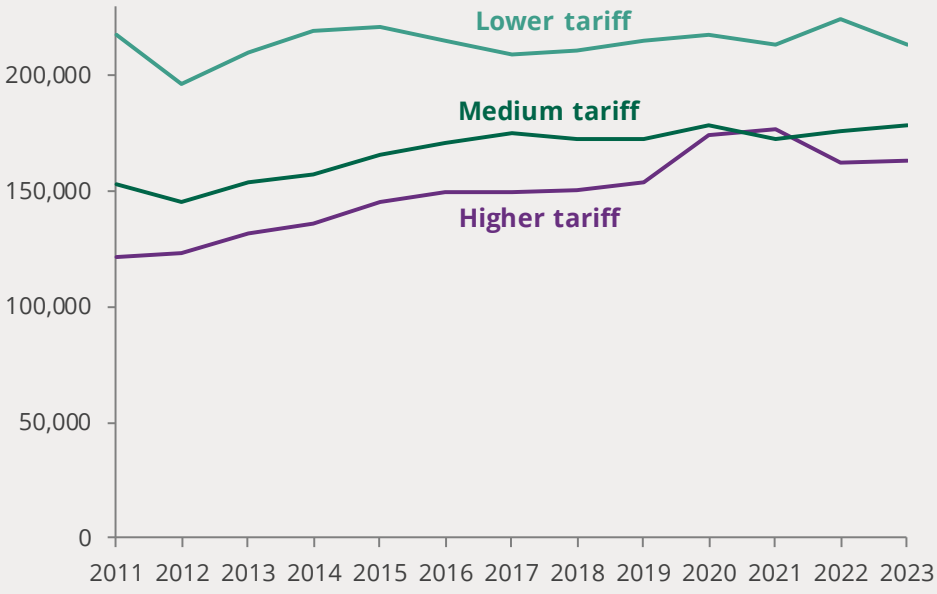
The number of accepted applicants can also be analysed by the 'tariff level' of universities. There are three tariff groups; high, medium and low which refer to average grades of students admitted. The previous section highlighted earlier concerns that a combination of the expected drop in overseas student income and the changes in A level grading could lead to more prestigious universities increasing student numbers at the expense of less prestigious ones. The chart below shows that 2020 saw a clear increase in acceptances

[28] UCAS undergraduate sector-level end of cycle data resources 2020 (Nursing)

at higher tariff institutions of 13%, while numbers at lower tariff universities barely increased.

Jump in acceptances at more prestigious universities in 2020

Accepted applicants from all domiciles by provider tariff group



Source: UCAS, End of cycle data resources 2023

While this seems to suggest that some of the earlier concerns have been realised it is important to note that this has been within an overall *increase* in acceptances. The increase at lower tariff institutions was still 1.1%. If the general shift towards higher tariff universities had been evident with a *falling* number of potential students, the impact could have been much larger.

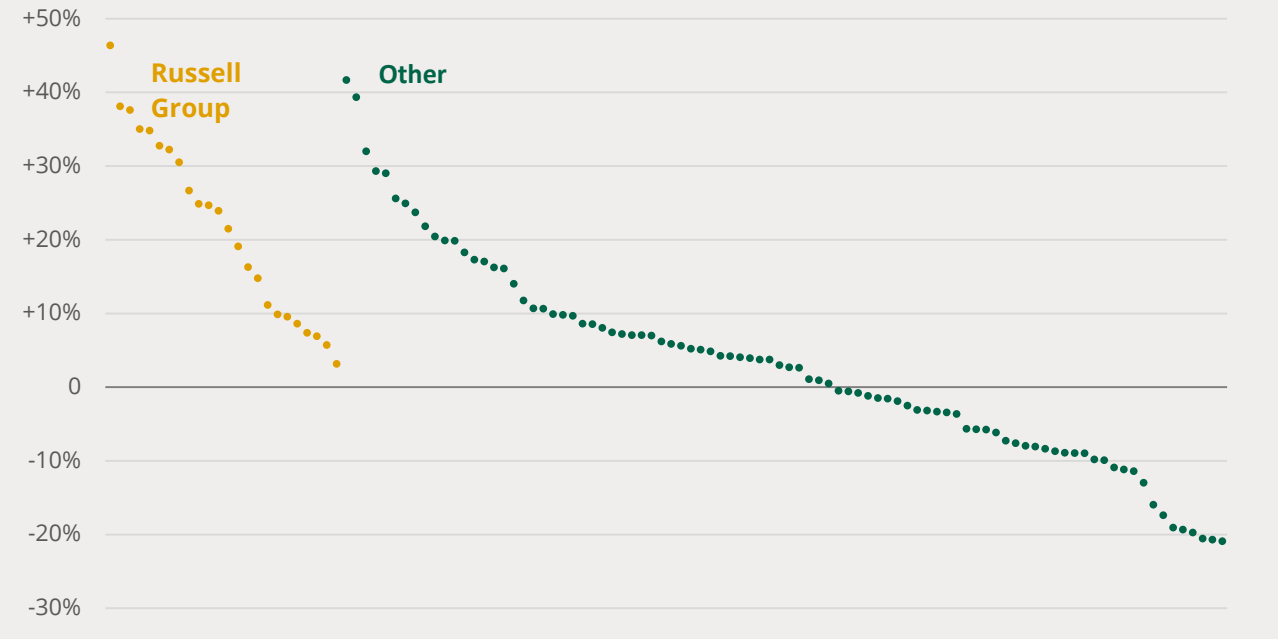
There was a smaller change in 2021, with only higher tariff institutions seeing their numbers increase. In 2022 the pandemic trend reversed with a fall in acceptances at higher and an increase at lower and medium tariff institutions. In 2023 only lower tariff institutions saw their number of acceptances decline. This took values back to a level broadly consistent with their pre-pandemic trends.

Individual providers

The chart below shows how the number of home accepted applicants aged 18 changed in 2020. It only includes providers that recruited more than 500 such students in 2020. There was a wide range from +46% at UCL to -21% at the University of Surrey, the University of Roehampton and Heriot-Watt University. 23 (of 114) providers saw an increase of 20% or more, 40 had a reduction in recruitment of 18 year olds.

Wide range of changes to recruitment of 18 year olds in 2020, larger increases at most Russell Group universities

Annual change in home accepted applicants aged 18, full time undergraduate courses



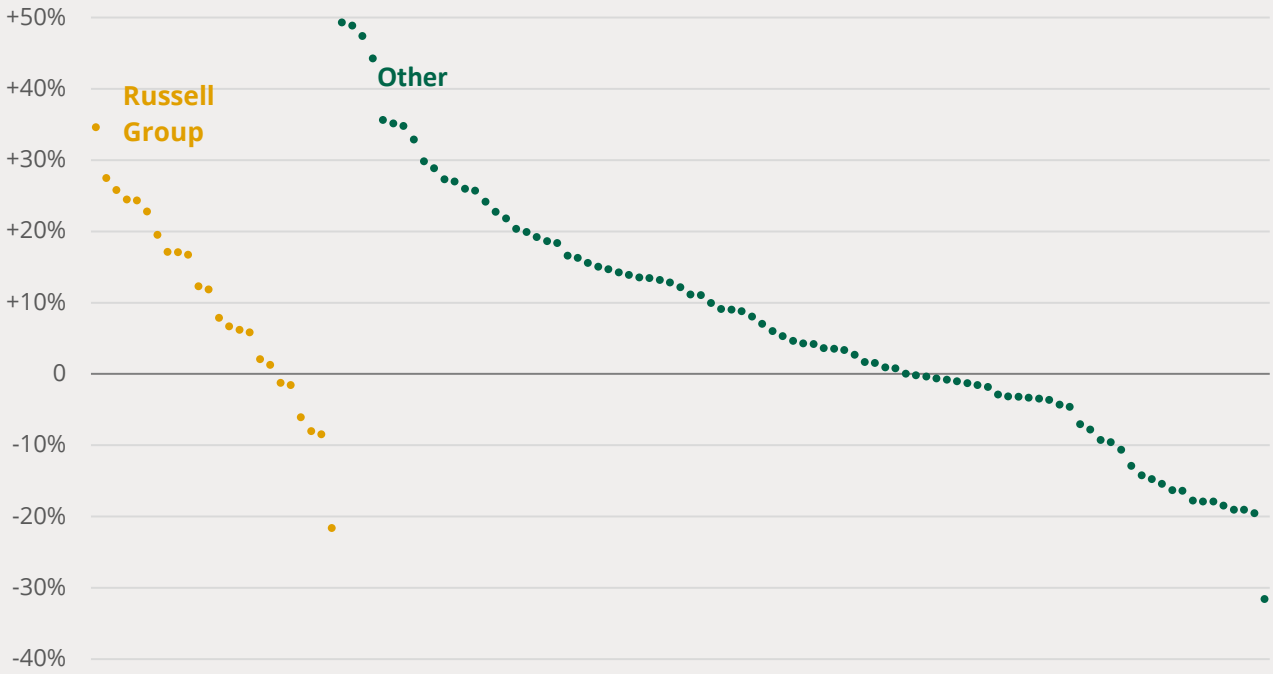
Source: : 2020 entry provider-level end of cycle data resources, UCAS

The chart also highlights the 24 'prestigious' Russell Group universities. No Russell Group member saw a fall in acceptances of home 18 year olds, only two had an increase that was below average (7%) and they made up 12 of the top 20 increases by provider.

2021 data shows much less difference between types of universities

Wide range in changes to recruitment in 2021, but little overall difference between Russell Group and other universities

Annual change in home accepted applicants aged 18, full time undergraduate courses



Source: : 2021 entry provider-level end of cycle data resources, UCAS

Grade increases

UCAS has analysed outcomes for those whose grades increased because of the switch to CAGs. This found that by 10 September 89% of the 174,000 with a grade increase were placed at their original firm or insurance choice university or had found a place through clearing at one in the same tariff banding. They estimated that up to 15,000 A-level students who did not have their firm choice confirmed on results day may have done so after CAGs were issued. 87% of these students were placed at their original firm or insurance choice university by 10 September, or one in the same or higher tariff band. Less than 10% had not (yet) found a place.[29]

Deferred entry

There was earlier concern that limitations on the type of teaching possible under coronavirus restriction would lead to a large increase in deferrals - students accepting a place for 2021 or later years. The number of deferrals was up in the 2020 cycle, by 18% to 35,700, but the proportion of acceptances which are deferred was only up modestly from 5.6% in 2019 to 6.3% in 2020. By far the largest increase in deferrals was from non-EU overseas countries; these more than doubled to 4,400. Deferrals from EU applicants were down by around 100. Delaying their entry would mean they would not be eligible for

[29] UCAS press release 11 September 2020 *Students supported to return to preferred choices*

home fee status or financial support in the form of fee loans. The deferral rate among 18 year olds from the UK was up slightly from 8.2% in 2019 to 8.4% in 2020.[30]

2021

Students taking A levels in the summer of 2021 experienced ongoing disruption to most of their two-year studies due to the coronavirus pandemic. In response, the Government allowed a reduction in course curriculums, and, for the second year running, summer exams were cancelled. Final grades were awarded based on teacher or centre assessment of student performance. Results showed another significant increase in the number of A* and A grades awarded and an increase in the overall number of students passing. The briefing papers Coronavirus: GCSEs, A Levels and equivalents in 2021 and University admissions 2021 give more background.

Applicants

The overall number of applicants increased by 20,800 or 2.9% to another record high. Within this total the key patterns were:

- Home applicants were up by 5%
- Applicants from outside the EU were up by 13%
- Applicants from the EU were down by 40%.
- Home applicants aged 18 were up by 9%.
- Applicants from mature students (aged 21 and older) were up by 4%, with increases of 11% in the 30-34 and 8% in the 35 and older groups
- Applications for nursing courses were up by 23%, with larger increases among older applicants

Earlier on in the application cycle UCAS pointed out that the increase in applications from mature students was linked to the impact of the pandemic on the economy. Applications from mature students tend to increase in times of recession as people see the need and opportunity to improve their skills and long term employment prospects.[31]

Accepted applicants

The number of accepted applicants fell from its record high in 2020 by 8,400 (1.5%) to 562,000. The number of UK applicants with a confirmed place was up by 1.4% and there was a 2.4% increase in acceptances from outside the EU. However, acceptances from the EU fell by 16,300 or 50%. Following Brexit, new rules came in for 2021 which meant that new EU students would face higher tuition fees (the same as other overseas students) and would no longer be eligible for loans to cover tuition fees.

30 UCAS undergraduate sector-level end of cycle data resources 2020

31 UCAS news release 18 February 2021, Nursing applications soar and UCAS publishes latest undergraduate applicant analysis

The number of home 18 year olds with a confirmed place increased by 17,300 (6.7%). This was 38.3% of the 18 year old population, up from 37.0% in 2020 and another new record. The number of UK 18 year olds in the population is now increasing after years of falling. This increase will continue over the next decade and is likely to lead to further increases in the student population even if entry rates remain the same. The next section of this paper looks in more detail at changes in entry rates for different groups of UK 18 year olds

Some other key findings related to the ongoing pandemic from the data on accepted applicants in 2021 were:[32]

- Acceptances among those aged 19 and 20 were down by 10-11%, there were smaller falls among those aged 21-29 and a 4% increase among those aged 30 or older.
- More applicants from China had a confirmed placed than from any other overseas country. Their number increased by 1%, the smallest increase since 2014.
- While there were large falls in acceptances from many EU countries, the number from Ireland increased by 320 (15%).
- There was a small increase (0.5%) in accepted applicants to nursing courses
- Acceptances to higher tariff institutions increased by 1.3%, while those to medium and lower tariff universities were down by 3.7% and 1.9% respectively. This continues the pattern seen in 2020 and reflects the increased number students with top A-level grades. More students were accepted at higher tariff than medium institutions for the first time.
- The number of accepted applicants who deferred their place was up by around 1,000 (3%), although this increase was smaller than in 2020. Deferrals were down among overseas students and up by 8% among home students

[32] Ucas undergraduate-sector-level end of cycle data resources 2021

6 Appendix 2: Higher Education Funding Council for England analysis

The (former) Higher Education Funding Council for England (HEFCE) published regular statistics and analysis of student numbers at English institutions. Their main focus is on home and EU students –those their funding/remit is linked with to some extent. This analysis is therefore especially relevant on the impact of changes in policy, specifically the impact of the 2012 reforms in England.

As the large majority of UK students study in England English the HEFCE data tended to show very similar trends to the HESA data set out above. This paper therefore just summarises some of their more recent analysis and commentary around these trends. It is taken from the following:

- Higher education in England: Impact of the 2012 reforms (March 2013)
- Higher education in England 2014 Analysis of latest shifts and trends (April 2014)
- Pressure from all sides: Economic and policy influences on part-time higher education (April 2014)
- Higher Education in England 2015 (July 2015)
- Higher education in England: The population of undergraduates (March 2017)
- Higher education in England: The population of postgraduates (March 2017)

The briefing paper HE in England from 2012: Student numbers looked in much more detail at their data and analysis from this period.

Undergraduates

The fall in full-time undergraduate entrants between 2010/11 and 2012/13 was concentrated in courses other than first degrees. Entrants to these courses fell by 35%. Just over half of the fall was due to changes in nursing qualifications, which shifted from diplomas to degrees. Among other courses taught at higher education institutions the largest absolute fall was almost 8,000 in foundation degrees.[33]

[33] The funding council removed additional support for these courses from 2010/11.

HEFCE has linked the sharp decline in part-time students to the impact of the recession on Government spending, company training budgets, the 2012 funding reforms and some earlier policy changes

These trends have continued and in 2014 they said that "Higher education institutions appear to be existing the market for study below degree level and focussing their undergraduate provision around degree courses." There has been an increase to these courses at further education colleges.

The 2012 reforms cut the funding for part-time as well as full-time undergraduate courses, but part-time students had access to tuition fee loans for the first time in 2012. The largest fall in entrants in 2012 across all broad modes and levels was in part-time undergraduates. Their number fell by 78,000 or 34% in 2012/13. There were further falls of 20,000 in 2013/14, 18,000 in 2014/15, 5,000 in 2015/16 and 10,000 in 2016/17. These took numbers to 63% below their 2008 level. HEFCE suggestions of the different contributory factors behind the scale of the drop in part-time undergraduates included:

- Cuts in funding for equivalent and lower qualifications from 2008/09
- Phasing out of the programme to promote employer co-sponsored courses after 2011/12
- The 2012 funding reforms, specifically the loss of most direct funding for teaching, the impact on fees, possible confusion around the operation of loans, reluctance among mature students to take out loans and the fact that loans are not available for courses with an intensity of less than 25%
- The impact of the recession and continued 'challenging' economic conditions on individuals to fund their own part-time courses and employers to directly fund courses for their employees.

HEFCE said in 2014 that the overall decline in part-time entrants may "…have a detrimental impact on widening access overall". This is because part-time higher education tends to have a higher share of students with characteristics linked to lower levels of participation - more mature students and those from 'non-traditional backgrounds' including disadvantaged, students with low prior qualifications or caring responsibilities.

Postgraduates

Full-time postgraduate entrants increased from 2007 to 2011. They remained broadly stable up to 2015/16 before increasing by 22% (taught courses) in 2016/17. This jump is thought to be due to the introduction of loans for these courses. There was a smaller increase in part-time taught postgraduate courses of 9%. Full-time postgraduates are now in the majority (55% among home and EU students) after being the minority of entrants before 2011.

Much of the decline in part-time taught postgraduate entrants was in the subject area of education.[34] Without this subject the decline in part-time postgraduate courses has been much more modest. While postgraduate fees have increased HEFCE said that the main policy impact on part-time postgraduate entrants have been changes leading to lower support from

[34] Almost 19,000 out of a total fall of 25,000. The share was even larger (84%) if only higher education institutions are included.

employers for such courses in education. They also link the wider reduction in part-time postgraduate study to austerity measures introduced by the (then) current Government which have reduced public sector employment[35] and cuts in training and development budgets.

HEFCE have raised the possibility that 2012 undergraduate entrants could be less likely to go on to postgraduate study because of their higher debts and limited access to finance. It is suggested that these effects will vary between different socio-economic groups and could result in a wider gap in postgraduate entry rates between these different groups. In their 2014 assessment they said "There is evidence to suggest that it is increasingly the better off who engage in study for a taught masters or doctorate."[36]

[35] And hence in potential part-time study particularly in education and subjects allied to medicine

[36] Higher education in England 2014 Analysis of latest shifts and trends, HEFCE p.37

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