

End of cycle report

2017

Executive summary



Introduction

The UCAS End of Cycle Report is the first national overview of demand for and acceptances to UK higher education (HE) for the previous year.

It provides independent in-depth analysis and insight about who's applying and getting in to HE, changing patterns of recruitment and the impacts of qualification, market reforms and widening participation and access activities, drawing on UCAS' many years of expertise in this area. With the current political, social and economic backdrop, and an increasingly competitive higher education market, understanding admissions patterns has rarely been more important.

A summary of findings within each of the publications will be shown below as analysis notes are released.

Summary

Patterns by applicant characteristics, Offer-making, and Qualifications and competition [published 14 December 2017]

The final release of this year's End of Cycle Report brings together patterns in offer-making, equality of representation, and provides an analysis of the qualifications held among those accepted.

Equality of representation

The section on equality draws heavily on UCAS' recent work on understanding the multidimensional nature of disadvantage with reference to HE entry. Reporting of entry rates using UCAS' multiple equality measure (MEM) shows how, despite 18 year olds from all backgrounds being more likely to enter HE in 2017 than ever before, an increase of 78 per cent for the most disadvantaged group since 2006, little progress has been made in narrowing the gap between those most and least likely to enter HE since 2014.

In 2017, 13.8 per cent of 18 year olds from the most disadvantaged MEM group entered HE, the highest proportion on record, an increase of 0.2 percentage points on 2016. However, entry rates for the other (more advantaged) MEM groups increased by more this year. The entry rate of 18 year olds from the most advantaged MEM group was 53.1 per cent this year, an increase of 1 percentage point, meaning they were 3.8 times more likely to enter HE than those from the most disadvantaged areas. This ratio has now remained unchanged for three successive cycles.

Similar patterns are also seen for several of the single equality dimensions that comprised the MEM. For example, the gap in participation between state school pupils from richer and poorer households (measured through receipt of free school meals) remains unchanged from 2016, with those who do not claim free school

meals twice as likely to enter HE compared to those who claim them. Elsewhere, 18 year old women were more than a third more likely to enter than 18 year old men. And, although entry rates increased for all ethnic groups this year, the increase for the White ethnic group was smaller than for the other ethnic groups. This means the gap between the White ethnic group and all other ethnic groups continues to widen, and that those from the White ethnic group remain the least likely to enter HE.

However, the gap between those living in the most and least disadvantaged POLAR3 areas did narrow slightly this year, as the longer term upward trend in entry rates since 2006 continued.

Gaps in equality of representation are largest at those providers which have historically accepted applicants who achieve the highest A level grades. In 2017, 18 year olds from the most advantaged MEM group were 9.8 times more likely to be accepted to one of these higher tariff providers than 18 year olds from the most disadvantaged MEM group. Since 2009, the gap between these groups has narrowed every year, and, for higher tariff providers, is smaller than ever before.

Offer-making

Increasing demand for full time, undergraduate HE over recent years, combined with the removal of controls on student numbers in England, has driven year-on-year increases in the number of offers made to applicants. Between 2012 and 2016, the number of offers increased by 21 per cent, though the growth in offer-making has been slowing. This year, the number of offers fell very slightly, by less 0.1 per cent, to just over 1.9 million. This reduction is, in part, due to fewer applications made this year.

Despite this, offer rates (the proportion of applications that receive an offer) increased in 2017, meaning applications made this year were more likely than ever before to receive an offer. 77.3 per cent of applications by 18 years olds received an offer, but particularly noteworthy were the increases in offer rates for older age groups. The offer rate to applicants aged 21 to 25 increased by the largest amount on record, to 48.6 per cent, as did the offer rate to those aged 26 and over, which increased to 40.6 per cent.

Analysis also shows varied patterns in offer-making by providers in different parts of the UK. Applications made by UK 18 year olds to English providers were more likely than ever before to receive an offer, as were applications from English and Welsh 18 year olds to providers in Wales. In Scotland, the offer rate to applications from Scottish 18 year olds increased, while offer rates to applications from England and Northern Ireland fell. This is a reversal of the trend in recent years where offer rates to applications from Scotland, and the rest of the UK, diverged.

Among English 18 year old applicants who made five choices, over 99 per cent received at least one offer, and between one and two thirds, depending on their predicted grade profiles, received offers for each of their five choices.

18 year olds from England, Northern Ireland, and Wales typically apply with pending qualifications. As such, the majority of offers made to this group of applicants have conditions attached, usually related to attaining specific qualification and grade profiles. These are referred to as conditional offers and, in 2017, accounted for 94.7 per cent of all offers made to 18 year olds from England, Northern Ireland, and Wales. The remaining 5.3 per cent were unconditional offers, which may be given where providers believe that the applicant has demonstrated sufficient potential to succeed on the course they have applied for, in advance of having been awarded their final qualifications.

Since 2013, the number of recorded unconditional offers has increased. This year, there were 51,615 unconditional offers made, a 40 per cent increase on the number in 2016. 17.5 per cent of 18 year old applicants from England, Northern Ireland, and Wales received at least one recorded unconditional offer in 2017, but large variations exist according to where applicants live and their predicted grades.

At most providers, unconditional offer-making represents a small percentage of all offers made. In 2017, of the largest 140 UCAS providers, unconditional offers accounted for less than 1 per cent of all offers made at 61 providers, and for less than 5 per cent of all offers made at 91 providers.

Qualifications and competition

Entry to higher education is largely influenced by the qualifications applicants hold. This year, entry rates for UK 18 year olds have increased for students holding A levels alone, and for those holding A levels in combination with BTECs, but have remained stable for the other qualification types.

Analysis of attainment data shows that A level applicants generally receive lower grades than they are predicted. This year, only a quarter of placed applicants met or exceeded their predicted grades. There has been a reduction in the proportion of applicants accepted with A levels that are between one and three grades lower than predicted across all three A levels, and an increase in the proportion of placed applicants accepted with A level grades between four and six grades lower than predicted.

Applicants who miss their predicted A levels by three grades or more, are more likely to be accepted at lower and medium tariff providers. In 2017, over a fifth of applicants placed at medium tariff providers, and a quarter of applicants placed at lower tariff providers, missed their predicted A levels by between four and six grades.

2017 saw the first year of students being accepted to HE with a mixture of reformed and non-reformed A level subjects. The recent trend, of a widening gap between

predicted and achieved A level attainment, continued in subjects that have been reformed, and those that have not.

This year, medium and lower tariff providers showed little change in proportions of placed applicants with grades at or above the level of BCC at A level. However, at CCC and below, lower tariff providers had reductions in the proportions of placed applicants, with medium tariff providers increasing their acceptances. This has resulted in an overall fall in the average level of attainment of applicants accepted at medium tariff providers.

Patterns by geography [published 11 December 2017]

18 year olds from the UK are more likely to enter HE than ever before. Entry rates, which measure the proportion of the 18 year old population entering HE, reported at regional and parliamentary constituency level, reveal how young people in almost all parts of the UK are now more likely to enter higher education than they were last year. These patterns are a continuation of those seen since the start of the reporting period in 2006, where entry rates in the majority areas have increased.

Across England, the entry rate for 18 year olds was 33.3 per cent, an increase of 2.5 per cent since last year, however, analysis of entry patterns by geography reveals large variations between areas. Across the reporting period, young people from London were more likely than those elsewhere in England to enter HE, with 41.8 per cent of all 18 year olds entering this year. In contrast, young people in the North East and South West of England have historically been the least likely to enter HE. In 2017, 28.9 per cent of 18 year olds from the South West entered HE, making this the region with the lowest entry rate.

This year, 18 year olds from London were 4.6 per cent more likely to enter HE than in 2016, and 43 per cent more likely than in 2006. These large increases in London have widened the difference in entry to HE between London and the rest of England that were present in 2006. 18 year olds from London are now 25 per cent more likely to enter HE than those from across England as a whole and 43 per cent more likely than 18 year olds from the South West. The East Midlands had the smallest increase in entry rate this year, increasing by 1.4 per cent (around half the increase for England as a whole) to 30.3 per cent.

In Northern Ireland the entry rate this year was 34.5 per cent, in Scotland it was 25.9 per cent, and in Wales it was 29.4 per cent.

Patterns of acceptances by domicile also vary across providers located in each of the four UK countries. This year's end of cycle report reviews these patterns through analysis of acceptances by domicile for providers in England, Northern Ireland, Scotland and Wales, the first analytical commentary of this kind published by UCAS. Of particular note here is a 3 per cent increase in the number of Scottish applicants

accepted to Scottish providers, which meant there were over 1,000 more Scottish applicants placed at providers in Scotland this year compared to last.

Looking beyond the UK, this year acceptances from the EU fell by 2.1 per cent, but the patterns across individual European countries were mixed. There were fewer acceptances this year from most European countries, including Germany, Ireland, Romania and Bulgaria which had a combined reduction of more than 1,000 acceptances. But acceptances from other countries increased, most notably Portugal, Lithuania, Poland and Spain, from which there were an additional 600 acceptances this year.

The number of acceptances from outside the EU to UK providers increased by 1,900 this year (+5 per cent), to 40,205, the highest on record. Most of this increase was to providers in England, where non-EU acceptances increased by 1,625 (+4.9 per cent), again, the highest on record. But there were also increases in non-EU acceptances to providers in Scotland and Wales, which between them had an additional 280 acceptances this year.

Patterns by subject [published 4 December 2017]

This section of the report covers both the patterns across high-level subject groups and, in response to funding model changes for most new nursing, midwifery and allied health students domiciled in England, a specific focus on patterns in nursing subjects.

Against the backdrop of an overall 0.2 per cent decrease in acceptances this year, there were notable increases in acceptances to architecture, building and planning; law; and social studies. Longer term patterns of growth can be seen in biological sciences, social studies, and computer sciences, with increases in acceptances significantly exceeding the baseline increase in acceptances since 2008. The longer-term decline in combination subjects and European and non-European language subjects continued this year, with far fewer acceptances seen in 2017 than 2008.

For 18 out of the 26 subject groups, more women than men were accepted. Within certain subject areas significantly different ratios between men and women exist, the most contrasting of which are Education, with over 6 women for every man, and Computer sciences, with over 6 men for every woman accepted to study.

Demand for nursing courses has traditionally far outstripped supply, and this pattern has continued in 2017. Although applications for nursing subjects fell in 2017 by 18 per cent (the largest fall on record), overall acceptances were the second highest recorded, only slightly below last year's record high (a 0.9 per cent decrease). The net effect of this is that the proportion of applicants accepted onto a nursing course rose to its highest level since 2009, however nursing continues to have one of the lowest acceptance rates across all subject groups.

With 1 in 6 of all applicants aged 21+ applying to nursing courses, the overall decline in older applicants is particularly apparent in nursing subjects, with a decline in acceptances of 13 per cent in the 21-25 age group and 6 per cent amongst those aged 26 or above. This decline amongst older age groups however is largely offset by increased acceptances amongst younger applicants, with record numbers of 18 and 19 year olds accepted onto nursing courses.

Typically, there are two to three times more acceptances of 18 year olds from the most advantaged areas (POLAR3 Q5) when compared to those from the most disadvantaged areas (POLAR3 Q1). Nursing is notable in attracting young people from POLAR quintiles in roughly equal measure; this remains broadly unchanged this year.

Applicants and acceptances to higher education; and Patterns by age [published 27 November 2017]

The patterns by age are particularly noteworthy. UK 18 year olds continue to access full time undergraduate higher education through UCAS in record numbers. In 2017, more than 241,500 UK 18 year olds were accepted, more than in any previous year. Set within the wider context of a declining population, the proportion of 18 year olds accessing higher education – one in every three in England – is now higher than ever before.

The continued success of UK higher education providers in attracting 18 year olds may have come at a price. For each successive (and until 2020, smaller) cohort of young people, higher proportions of 18 year olds entering higher education will mean fewer are likely to apply in future years when they are older. In England, record high 18 year old entry rates every year since 2013 have placed downward pressure on the number of 19 year olds applying, and consequently being accepted. This, in combination with changes to student support arrangements for those starting nursing courses in England, and a favourable employment market, will all have played a role in the drop in applications and acceptances from older age groups this year. These falls mean that, for the first time since 2012, overall UK acceptances have decreased. However, this 0.5 per cent decrease still puts UK acceptances at the third highest on record.

Although UK acceptances are down this year, the number accepted from outside the UK increased by 2 per cent to the highest ever total, the fifth successive year acceptances from this group have increased. Within this, there is a fall in acceptances from within the EU (excluding the UK), which are 2 per cent lower than last year. But this decrease in EU acceptances is more than compensated for with a 5 per cent increase in acceptances from outside the EU, as UK higher education continues to be a popular destination for those domiciled overseas who wish to continue their studies.