INDEPENDENT
COMMISSION
ON FEES

Analysis of UCAS applications for 2012/13 admissions

August 2012

Contents

1. Introduction

i. Background

In response to the increase in university fees in the UK from 2012, the Independent Commission on Fees has been established to monitor the impact over the next three years. It will produce a series of reports assessing the impact of the increase in fees on application and admissions trends in universities, considering in particular the effect on young people from low and middle income backgrounds.

At this stage, the Commission is analysing data on applications from UK domiciled subjects to HEIs for admission in 2012. The Commission is extremely grateful to UCAS for their cooperation in providing datasets to help with this phase of the Commission's work. Our aim is to complement work being undertaken by UCAS but the interpretation and analysis in this report is our own and independent of UCAS or any other organisation. The Commission will gather evidence from a number of sources to support future phases of its work.

ii. Student fees from 2012

From 2012, universities in England can charge up to £9,000 per year for undergraduate courses, raising the cap from its 2011/12 level of £3,375. Universities wanting to charge more than £6,000 have to agree to put in place access measures, which will be assessed and monitored by the Office for Fair Access (OFFA).

Students in Scotland attending Scottish universities do not pay fees. In 2011/12, students from elsewhere in the UK had to pay £1,820 per year to study at a Scottish university but, from 2012, these universities will be able to charge up to £9,000 for students from elsewhere in the UK. Welsh universities can charge fees of up to £9,000, as in England, but the Welsh Assembly will pay fee costs above £3,465 a year for Welsh students studying at any UK university.

At universities in Northern Ireland, tuition fees for students from Northern Ireland in 2012 will be capped at £3,465, and will rise in line with inflation for the next four years. Fees for other UK students will not be capped but the Northern Ireland Executive has said that fees are not expected to exceed £9,000.

iii. The data

The Commission has independently analysed data (supplied by UCAS) for UCAS admission cycles, 2009 to 2012 inclusive, in each case using information available at the major application cut-off point in mid-January. This means that the datasets are comparable year on year, but they do not include all applications made in each cycle. All UK domiciled applicants are included. Alongside this analysis the Commission has reviewed longer term application trends produced by UCAS using data sets covering the period 2004 to 2012. These data sets use applications data at a different reference point of mid-March (each year) and use slightly definitions for some aspects of the analysis (for example, age), but the Commission is satisfied that the overall conclusions drawn here are not affected by these slight differences. UCAS published its findings on these data sets in July 2012 in their report 'How have applications for full-time undergraduate higher education in the UK changed in 2012' [1] (the 'UCAS Report'), which is referred to further in this report.

[1] 'How have applications for full-time undergraduate higher education in the UK changed in 2012', UCAS Analysis and Research, July 2012. Report and underlying data for results available at http://www.ucas.com/about_us/media_enquiries/media_releases/2012/2012applicationsanalysis

The data covers all course types. The majority of applications relate to honours degrees, but other course types such as foundation degrees and HNDs are also included.

Many of the comparisons in our independent analysis examine changes relative to 2010. Although the UCAS report finds no indication that application rates in 2011 were affected by the pre-announcing of the 2012 changes, we take this step to give a different perspective on the changes. These comparisons also need to be seen in the context of varying year-on-year student population sizes. For this reason the overall application trends are better analysed by looking at the longer term application rate trends (using the 2002-09 data sets) which take the varying size of the cohort populations into account.

This report examines both overall numbers of applicants and differentials between sub-groups. In our analyses, we have principally considered two groups of applicants: those aged up to 19 at the time of application, and those aged 20 or over. The UCAS report finds that, in terms of responses to the 2012 changes, 18 year olds and over 19 year olds behave as two distinct groups. They base their reporting around this with a focus on the 18 year old group who, having not had the opportunity to apply to HE before, are a particularly sensitive indicator group. We have generally taken a different approach and taken 18 year olds and 19 year olds together as a single 'young' group. We do this since it is a common measure of "young people" accessing HE used by the Department for Business Innovation and Skills, and others, and because 19 year olds form a very substantial share of total young applicants. In our view the group needs to be seen together as a full description of the experience of young people. We understand why UCAS want to wait until there is another year of applications data before calculating cohort application rates on this basis, but have decided to use 18 and 19 year olds together as an intermediate measure in the meantime.

It is also worth noting that although UCAS data covers the overwhelming majority of applications to higher education, it does not cover all UK institutions (or institutions overseas) although the relative number of these applications will be very small.

2. **Overall trends (all UK domiciled applicants)**

i. Applicant numbers by country of domicile and age group

Table 2.1: Number of applicants by country of domicile and year (January deadline)

		Year					
Country	**Age**	**2009**	**2010**	**2011**		**2012**	
England	Up to 19	262,728	298,155	301,695	(1.2%)	276,629	(-7.2%)
	20 and over	82,378	123,293	124,513	(1.0%)	107,541	(-12.8%)
	Total	345,106	421,448	426,208	(1.1%)	384,170	(-8.8%)
NI	Up to 19	12,771	13,875	14,110	(1.7%)	13,600	(-2.0%)
	20 and over	3,168	4,560	5,020	(10.1%)	4,692	(2.9%)
	Total	15,939	18,435	19,130	(3.8%)	18,292	(-0.8%)
Scotland	Up to 19	22,635	26,619	26,686	(0.3%)	26,463	(-0.6%)
	20 and over	6,914	12,144	13,075	(7.7%)	12,706	(4.6%)
	Total	29,549	38,763	39,761	(2.6%)	39,169	(1.0%)
Wales	Up to 19	13,922	14,908	14,951	(0.3%)	14,667	(-1.6%)
	20 and over	4,406	5,897	6,338	(7.5%)	6,209	(5.3%)
	Total	18,328	20,805	21,289	(2.3%)	20,876	(0.3%)
Total		**408,922**	**499,451**	**506,388**	(1.4%)	**462,507**	(-7.4%)

Note: Numbers in brackets are the percentage changes compared with **2010**

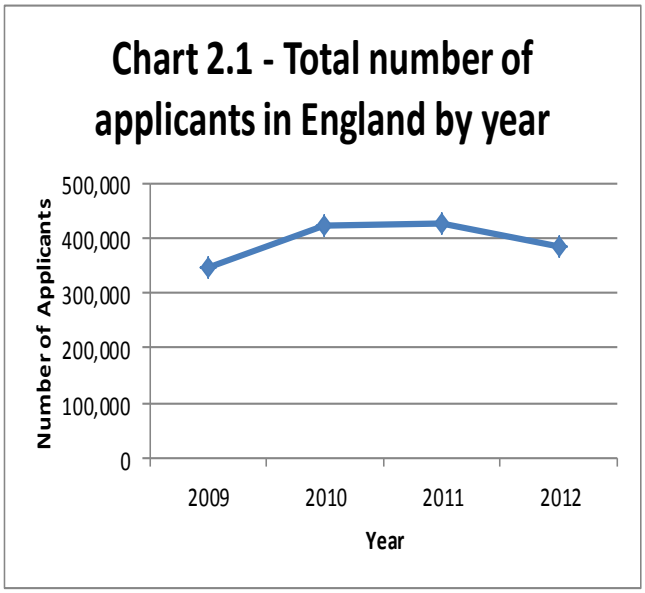
Table 2.1 summarises the number of applications overall in the UK by age group. In all four regions, the number of applicants peaked in 2011 (the last year before the increase in fees). Overall increases were largely as a result of increased numbers of applicants aged over 19, where there was a particularly sharp increase from 2009 to 2010.

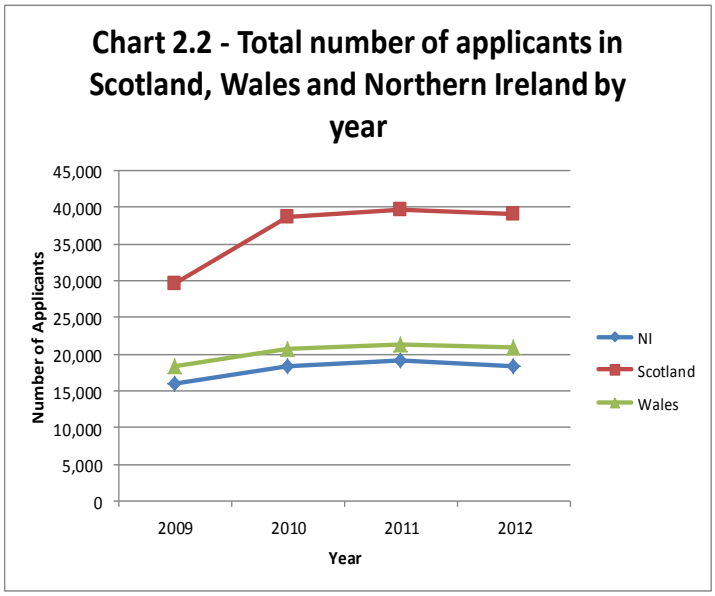
Decline in total UK applicants

The 2012 application cycle saw a noticeable dip in the total number of applicants from the comparable 2010 cycle of 7.4%. The comparison to 2010 is relevant since the 2011 cycle may have been affected by applicant decisions made ahead of the introduction of increased tuition fees, whereas this would not have been the case for the 2010 cycle (the data used in this report is recorded as of January, so 2010 numbers would not be affected by knowledge of the new fee regime). However 2012 applications were still ahead of the comparable number for 2009.

The dip in applications was seen mainly in England. The increase in tuition fees did not effectively apply to applicants from Wales or Northern Ireland, and only to a minor extent to those from Scotland. The decline in English applicants from the 2010 level was 8.8 %, as compared to a nearly constant level from the other home nations across this period. This may indicate a link between the level of tuition fees and the numbers of applicants. The fall in the population of 18 and

19 year olds is a significant factor in explaining some of the overall decline in applications (see section 2.2. below) but this is relatively constant across the UK, and cannot account for the difference in application drop-offs between the four home countries.





Decline in number of applicants by age group

For the purposes of this report we split our analysis between those applicants aged up to 19, and those aged 20 and over. We have included 19 year old applicants in our younger group, since they include most gap year students, and can still be considered as school leavers.

The largest single fall in applications was from English applicants aged 20 or over which declined from 123,293 in 2010 to 107,541 in 2012, a drop of 12.8%. This group represented 23% of the total 2012 applicant pool. English applicants aged up to 19, accounting for 60% of the pool, declined by 7%. Applications from the other home countries in all age groups either increased or showed significantly smaller declines.

Charts 2.3 and 2.4 below summarise the number of applicants aged 19 and under by country of domicile for the period 2009 to 2012. (Note that England is shown on a separate chart to highlight the difference in scale between the numbers of applicants from England and those from other nations). Scotland shows greater percentage increases over the same period, and Wales and Northern Ireland smaller increases, than England for those aged up to 19.

Chart 2.3: Number of applicants 19 and under from England by year

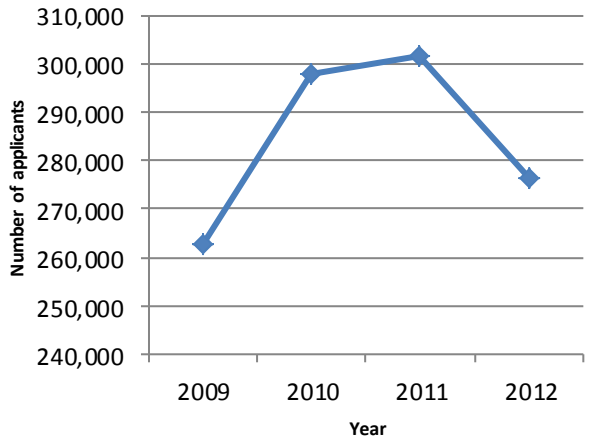
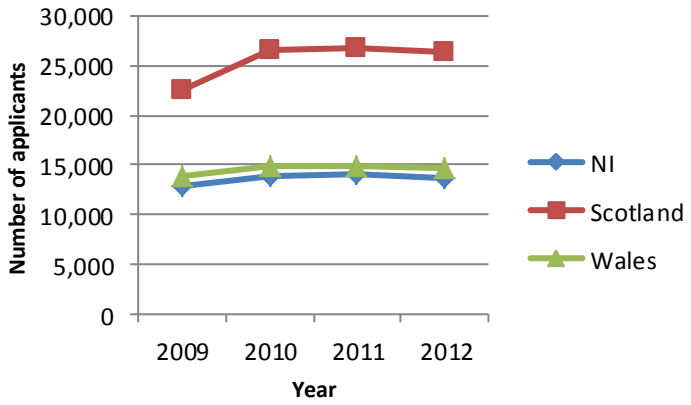


Chart 2.4: Number of applicants 19 and under from Scotland, Wales and Northern Ireland by year



Charts 2.5 and 2.6 show the number of applicants aged 20 and over for each year. For older students, growth has been greater outside England. In particular, the percentage drop in the number of applications in Scotland and Wales in 2012 was much smaller than the percentage drop for England.

Chart 2.5: Number of applicants aged 20 and over from England by year

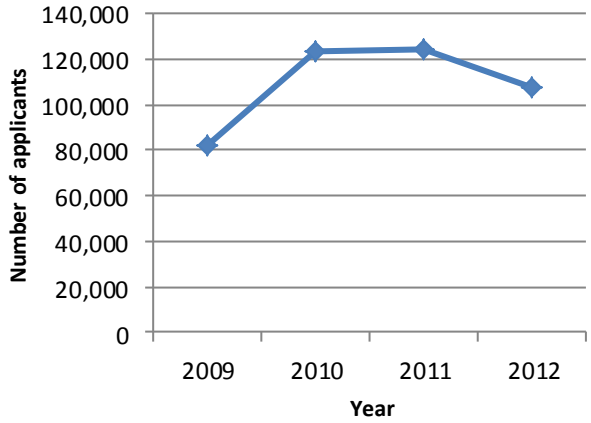
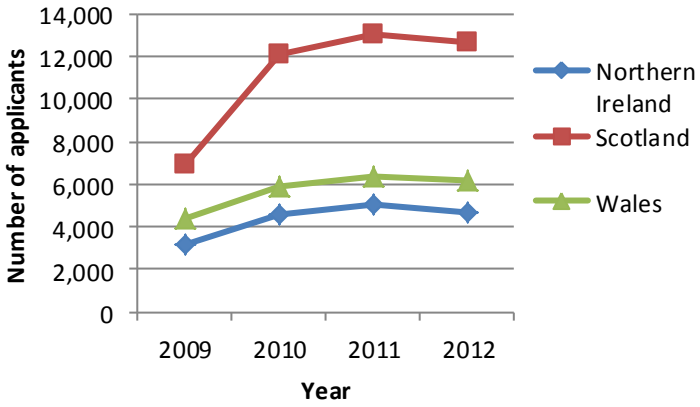


Chart 2.6: Number of applicants from students aged 20 and over from Scotland, Wales and Northern Ireland by year



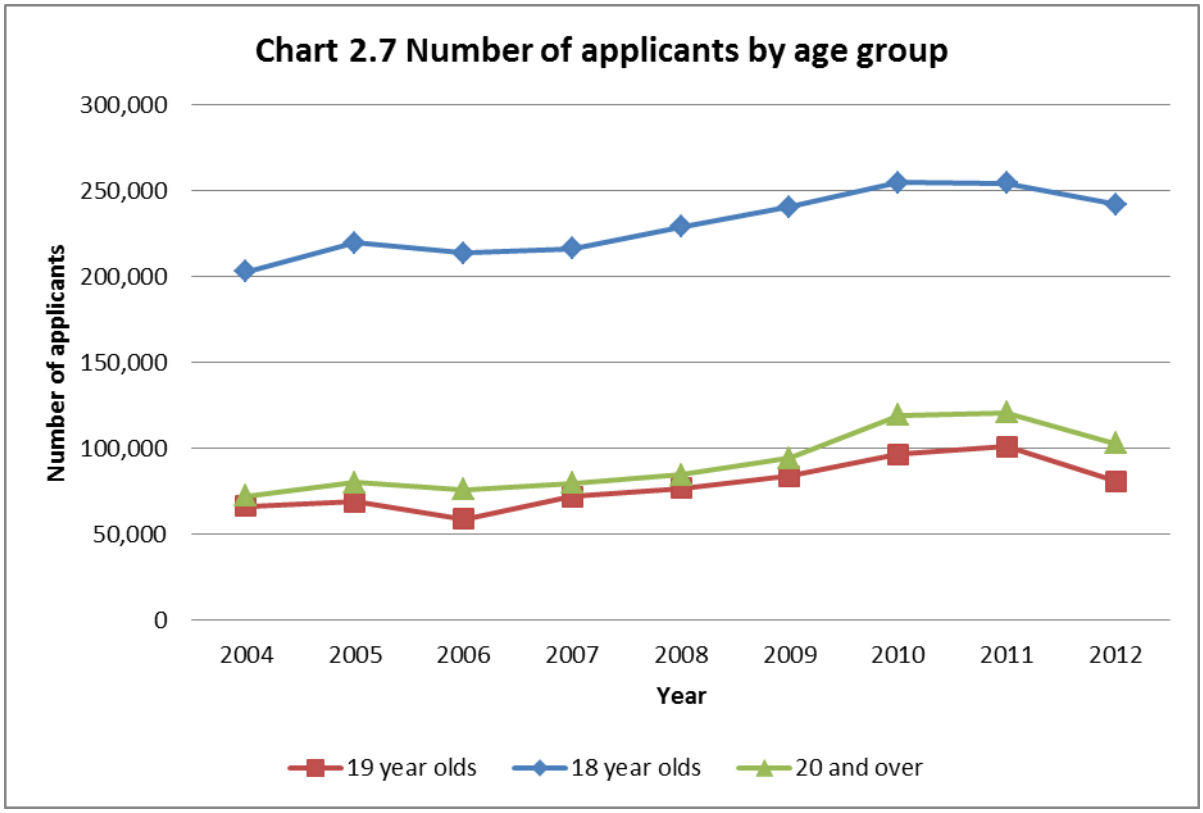
ii. Total applicant numbers: longer term trends

The analysis in section 2.i should be seen in the context of longer term application rate trends, which take into account the changes in cohort populations and allow the assessment of whether application behaviour has changed. These trends are investigated in the UCAS report. Here we use data from that report to take a different perspective by looking at the trends in applicant numbers.

Chart 2.7 shows the number of applicants by age group over the period from 2004, and shows that the decline in 2012 came after a long period of increasing numbers. It also shows 18 year olds as a separate group from 19 year olds

It is also worth noting at this point that in 2011 there was no indication that more 18 year olds were applying during that cycle rather than taking a gap year and applying in 2012. UCAS' own data analysis (see table 2.1 below) has shown no significant increase in the rate of applications from 18 year olds for that year.

This makes it harder to explain the relatively substantial drop-off in applications from 19 year olds, since it would have been reasonable to expect this to have been caused by an acceleration of applications into the prior year. We will re-examine this trend in the light of subsequent year applications data.



Source: Data from 'How have applications for full-time undergraduate higher education in the UK changed in 2012', UCAS July 2012, http://www.ucas.com/about_us/media_enquiries/media_releases/2012/2012applicationsanalysis

As already mentioned, the raw numbers of applicants does not take into account the variations over time in the size of the various age groups. UCAS have calculated application rates taking the population changes into account, and tables 2.1 and 2.2 below show these application rates for 18

year olds and 19 year olds over the full period. We can see that the application rates for both 18 and 19 year olds in England have dropped this year. In Wales and Scotland there has been no drop while in Northern Ireland the combined drop has been smaller(given the high overall application rate in Northern Ireland, the percentage decline is also smaller)

Table 2.1: Application rates for 18 year olds over time (excluding nursing applications)

	England	Wales	Scotland	N Ireland
2004	27%	26%	27%	35%
2005	29%	26%	27%	36%
2006	27%	26%	27%	40%
2007	28%	25%	26%	39%
2008	29%	26%	26%	39%
2009	30%	28%	27%	41%
2010	33%	28%	29%	43%
2011	34%	28%	29%	44%
2012	32%	28%	29%	43%

Table 2.2: Application rates for 19 year olds over time (excluding nursing applications)

	England	Wales	Scotland	N Ireland
2004	9%	7%	5%	6%
2005	9%	7%	5%	7%
2006	8%	6%	5%	7%
2007	9%	7%	6%	7%
2008	10%	7%	5%	7%
2009	11%	8%	6%	7%
2010	12%	9%	7%	9%
2011	13%	9%	8%	11%
2012	11%	9%	8%	9%

Source: Data from Figures 21-24 from 'How have applications for full-time undergraduate higher education in the UK changed in 2012', UCAS July 2012, http://www.ucas.com/about_us/media_enquiries/media_releases/2012/2012applicationsanalysis. Nursing applications are excluded in this analysis to avoid any effects from the introduction of nursing applications to the UCAS scheme.

The UCAS analysis has used population data to calculate the application rates, which takes into account a 1.4% fall in the total UK population of 18 year olds this year.

But, as can be seen, the comparative trends between the application rates from England and from the other home countries displays the same pattern as for the raw applicant numbers, and provide further evidence for a possible impact from the increase in tuition fees.

If we look at English 18 year olds in isolation, UCAS have calculated that the change in application rate from the long run trend equates to the loss of one in twenty of those who would otherwise have applied (some 15,000 applicants).

3. Trends in applicants by geographical measures of advantage

i. Indicators

Both our analysis and UCAS' analysis looked at applications in relation to some indicators of the types of area applicants come from. This includes:

QYPR POLAR2[2]:
This measure sorts the population into quintiles, depending on whether the neighbourhood they live in has historically seen relatively high or low numbers of young people progress into higher education. Specifically, it looks at those who were aged 18 between 2000 and 2004 and entered a course in a UK higher education institution or GB further education college, aged 18 or 19, between academic years 2000/01 and 2005/06.

The POLAR2 classification is formed by ranking 2001 Census Area Statistics wards by their young participation rates for the combined 2000 to 2004 cohorts. This gives five young participation quintile groups (QYPR) of areas ordered from '1' (those wards with the lowest participation) to '5' (those wards with the highest participation), each representing 20 per cent of UK young cohort. Students have been allocated to the neighbourhoods on the basis of their postcode. Those students whose postcode falls within wards with the lowest participation (quintile 1) are denoted as being from a low participation neighbourhood.

IDACI[3]
The Income Deprivation Affecting Children Index (IDACI) shows the percentage of children in each super output area that live in families that are income deprived (ie, in receipt of Income Support, Income based Jobseeker's Allowance, Working Families' Tax Credit or Disabled Person's Tax Credit below a given threshold). This is a measure of economic disadvantage, rather than educational disadvantage.

QAHE[4]
QAHE is a measure similar to QYPR, but it is based on the proportion of adults with a higher education qualification in an applicant's home post code. It is therefore potentially more relevant in looking at older populations, rather than school leavers.

ii. Analysis

The UCAS Report also released in July of this year demonstrates that the application rates for young people from all backgrounds have fallen in 2012 with the largest declines, both proportionally and in percentage points, for those from the most advantaged backgrounds. This is encouraging in that any potential impact from higher tuition fees does not appear to be having a disproportionate impact on those from less advantaged neighbourhoods. This analysis looks at both the QYPR and IDACI measures.

The fact that the decline is actually greatest in the most advantaged neighbourhoods needs to be seen in the context of the trend rate of growth over previous years, and the remaining very large differences between the application rates in these different areas. The UCAS analysis

[2] Developed by HEFCE, see http://www.hefce.ac.uk/whatwedo/wp/ourresearch/polar/polar2/
[3] http://www.communities.gov.uk/communities/research/indicesdeprivation/deprivation10/
[4] Developed by HEFCE, see 'Quintiles based on the proportion of HE-qualified adults' at http://www.hefce.ac.uk/whatwedo/wp/ourresearch/polar/polar2/

demonstrates that once the trend rate of growth is taken into account, the declines in applications can be seen as having affected all neighbourhood types to approximately the same extent.

Our own analysis looked at some slightly different measures:

In the case of older applicants we looked at QAHE as our indicator of neighbourhood advantage/disadvantage. As elsewhere we grouped 19 year olds along with 18 year olds in looking at younger applicants

In neither case did we uncover patterns that were meaningfully different from those seen in the UCAS analysis.

Chart 3.1 and table 3.1 below look at younger English applicants and show an analysis of the number of applicants from different POLAR2 QYPR quintiles, which produces similar conclusions to the UCAS analysis of the data.

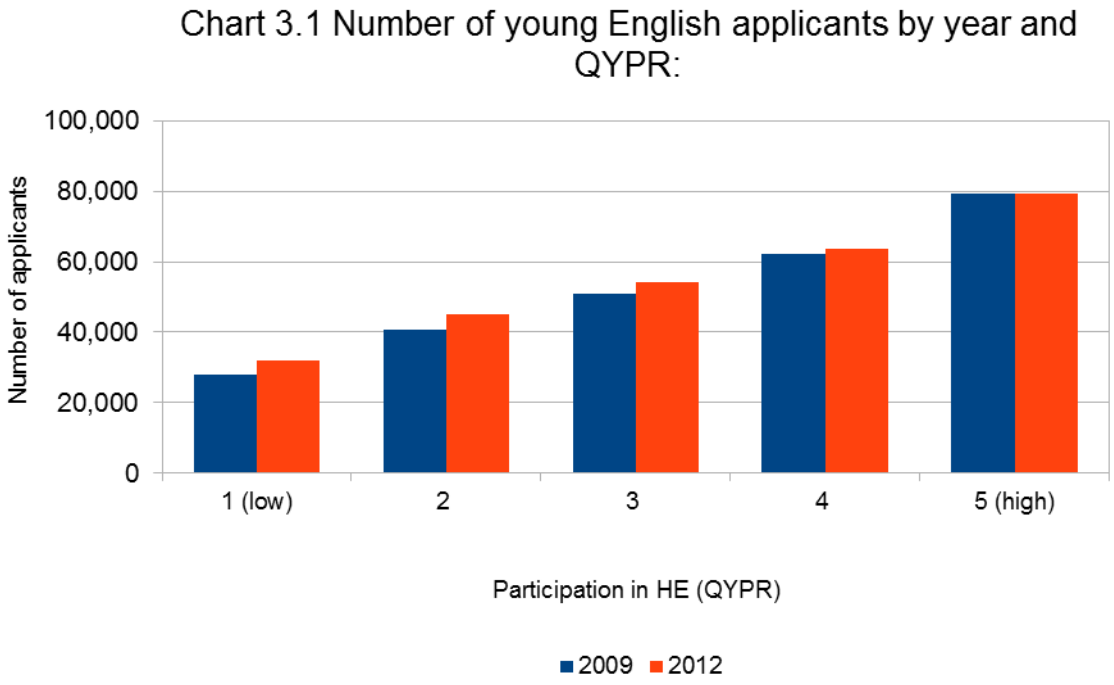


Table 3.1: Applicants aged up to 19 and domiciled in England by year and QYPR

	QYPR				
Year	1 (low participation)	2	3	4	5 (high participation)
2010	33752	47714	58419	69891	86505
2012	32,017 *(-5.1%)*	44,968 *(-5.8%)*	54,363 *(-6.9%)*	63,736 *(-8.8%)*	79,339 *(-8.3%)*

Note: Numbers in brackets are the percentage increase over 2010. Omits a small number of students (about 2,000 per year) with unknown QYPR.

The number of applicants from lower participation areas saw smaller percentage drops in applicants than high participation areas between 2010 and 2012. This may reflect high participation areas reaching saturation point. The pattern was similar for both males and females.

4. Analysis of applications to selective universities

In their report UCAS look at trends in applications to 'higher tariff institutions', that is, institutions whose accepted applicants have, on average, higher levels of entry qualifications. We have used the data sets supplied by UCAS to make our own initial analysis of the number of applications to highly selective universities but for our purposes we are interested in a similar, but different, grouping of institutions namely the Sutton Trust 13[5] and 30[6] groupings. We found some unexpected results that we could not find a sufficient explanation for.

Therefore, at our request, UCAS undertook further analysis to see whether any underlying patterns emerged when we looked at those applicants who had made at least one application to a selective university (as defined by the Sutton Trust groupings). UCAS undertook this analysis using the longer term data sets that are used in the rest of the UCAS Report, and reported the results as application rates so as to allow fully for changes in cohort populations. UCAS also analysed the data further to see whether there was any noticeable patterns in application rates across the different geographical areas of advantage / disadvantage, as described in section 3 above. The graphs used in this report, and the underlying data are available from UCAS on request.

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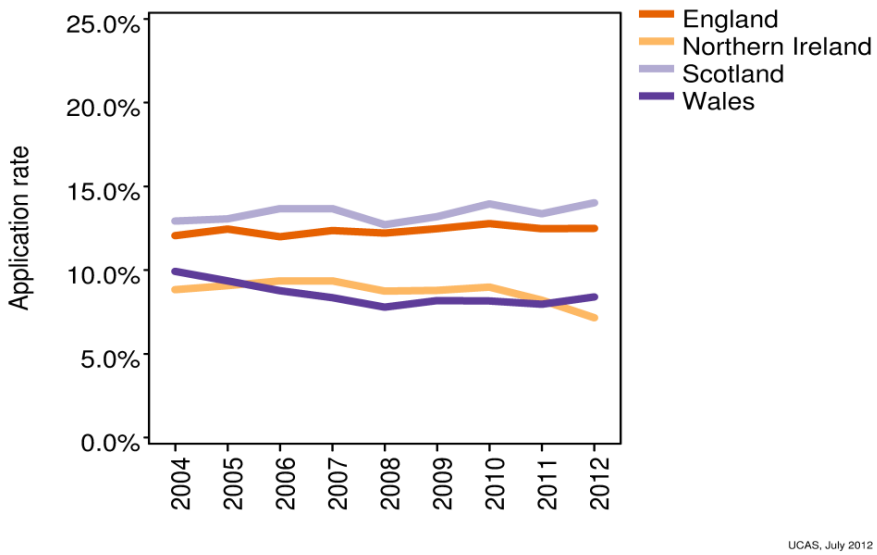
The analysis undertaken by UCAS at our request has shown (in charts 4.3 and 4.4 below) that for 18 year olds overall, there have been no significant changes in the application rates to highly selective universities this year compared to what would have been expected from previous years. This is consistent with UCAS' analysis of applications to higher tariff institutions.

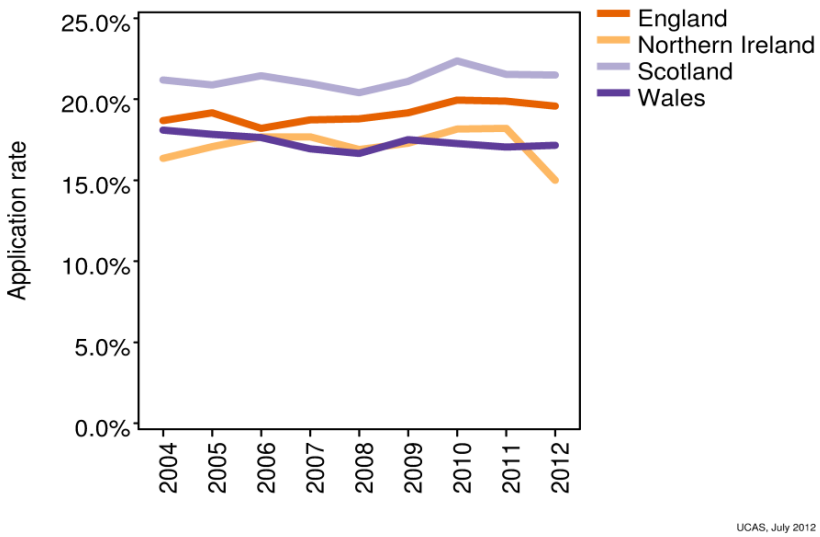
Chart 4.1 18 year old application rates to ST13 institutions by country



[5] The ST13 consists of Birmingham, Bristol, Cambridge, Durham, Edinburgh, Imperial College, LSE, Nottingham, Oxford, St Andrews, UCL, Warwick and York.

[6] The ST30 group also includes Bath, Cardiff, Exeter, Glasgow, King's College, Lancaster, Leeds, Leicester, Liverpool, Manchester, Newcastle, Reading, Royal Holloway College, Sheffield, Southampton, Strathclyde and Surrey.

Chart 4.2 18 year old application rates to ST30 institutions by country



Across the different nations we see much bigger declines in application rates to highly selective universities from Northern Ireland compared to the other nations, with an application rate to Sutton Trust 30 institutions this year of 15.0% compared to a rate of 18.2% in 2010. We do not currently have an explanation for this.

For 19 year olds and those 20 and over (Charts 4.3 and 4.4), we do see a decrease in application rates to selective universities. Looking at the second graph below (which is on a logarithmic scale) we can see the biggest drop in application rate has been for the 19 year olds: 40,370 applicants from a population of 796k (5%) in 2010 to 34,360 from a population of 757k (4.5%) in 2012. This is broadly in line with the overall drop in the 19 year old application rate from 12% to 11% (Table 2.2).

Chart 4.3 UK application rates to ST13 institutions by age group

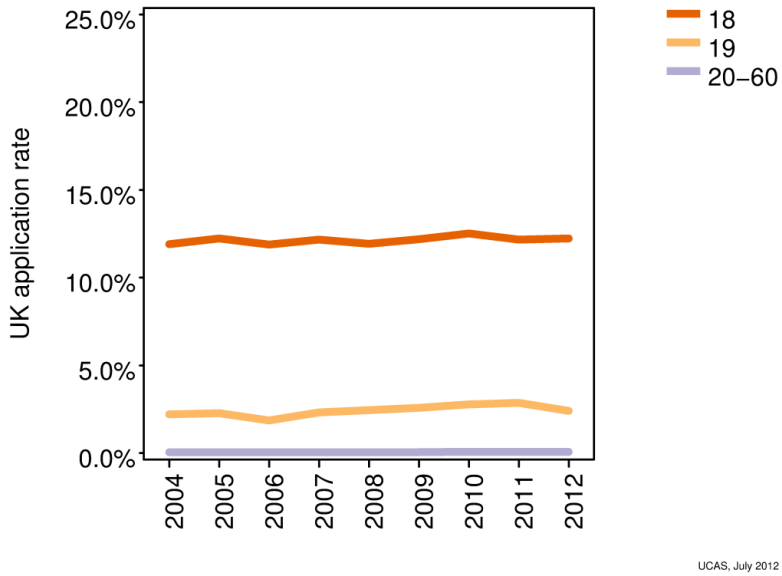
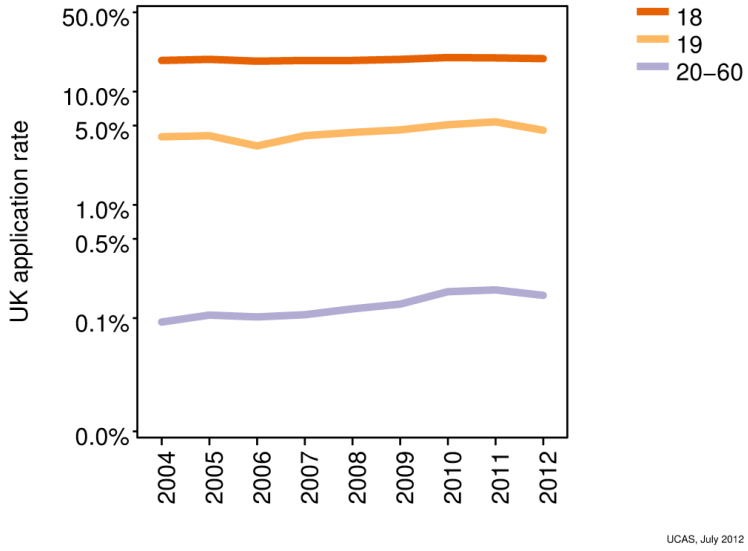


Chart 4.4 UK application rates to ST30 institutions by age group



To look at the relative effects that might be being experienced by applicants from different backgrounds the application rates for different POLAR2 quintiles were also considered. As discussed earlier in this report, POLAR2 is a measure of Higher Education participation rates in the area the applicant is from, with Q5 being the areas with the highest rates of HE participation and Q1 being the areas with the lowest participation. The analysis (charts 4.5-4.8) found that there are no significant differences in the application patterns in 2012 to highly selective universities across the different POLAR2 quintiles for 18 year old English applicants.

Chart 4.5
18 year old English application rates to Sutton Trust 13 institutions for areas grouped by young HE participation rates (POLAR2, Quintile 5 (Q5)= highest participation areas)

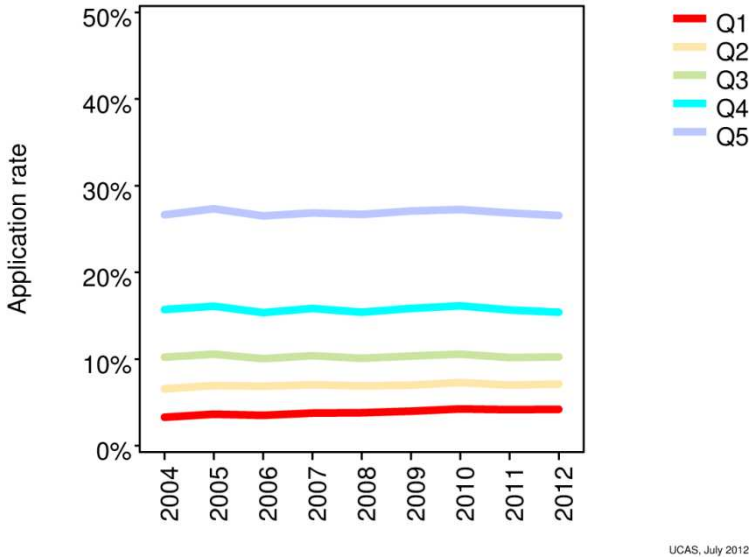


Chart 4.6

18 year old English application rates to Sutton Trust 30 institutions for areas grouped by young HE participation rates (POLAR2, Quintile 5 (Q5)= highest participation areas)

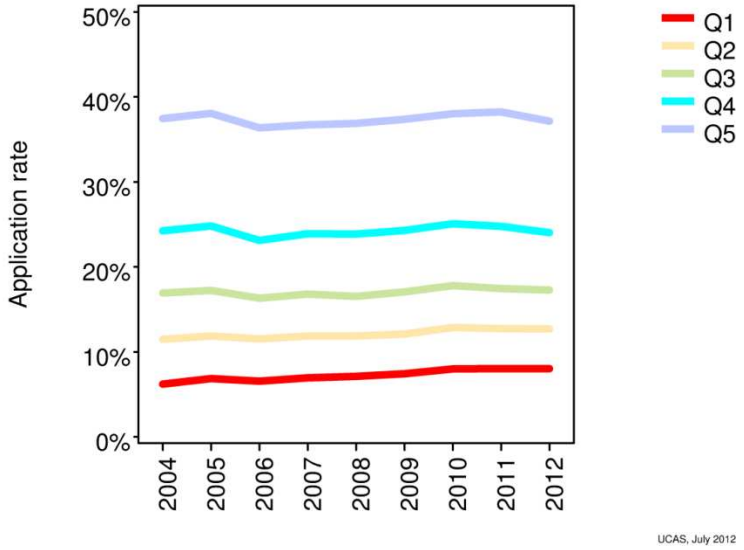


Chart 4.7

19 year old English application rates to Sutton Trust 13 institutions for areas grouped by young HE participation rates (POLAR2, Quintile 5 (Q5)= highest participation areas)

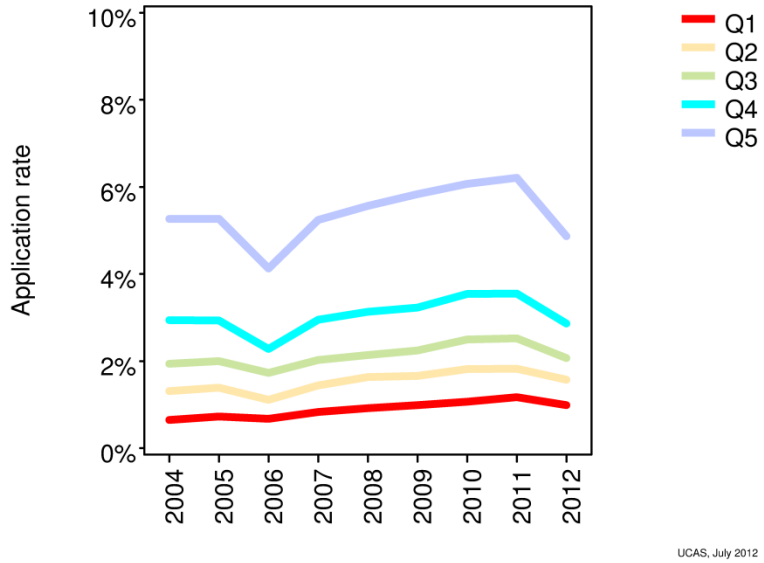
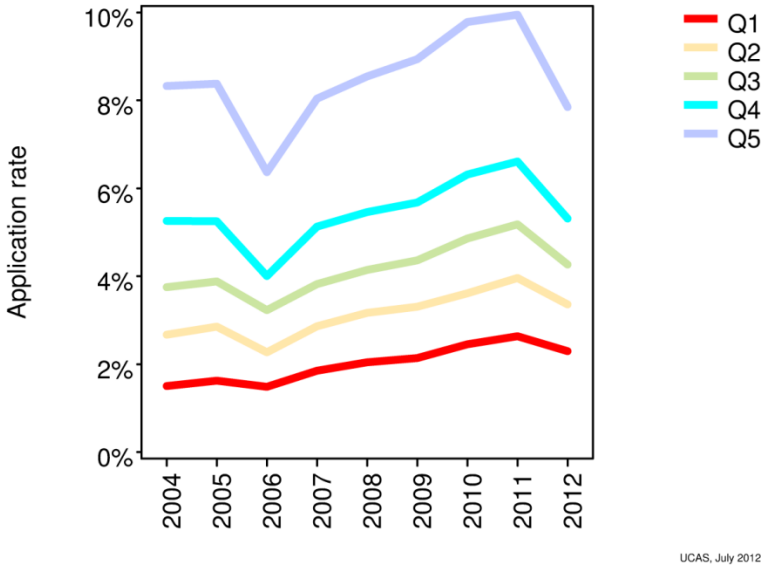


Chart 4.8
19 year old English application rates to Sutton Trust 30 institutions for areas grouped by young HE participation rates (POLAR2, Quintile 5 (Q5)= highest participation areas)



Again we see bigger decreases for English 19 year olds across the different POLAR2 quintiles in 2012. We also see larger relative declines from applicants in the most advantaged areas.

Another measure of disadvantage that UCAS has used in its analysis is the IDACI measure of the percentage of children living in low income households in the area each applicant is from. Graphs 4.9 to 4.12 below show a very similar story to the analysis by POLAR2 quintiles in that the greatest decline in application rates in 2012 to Sutton Trust 13/30 institutions are amongst 19 year olds, particularly for the most advantaged quintiles.

Chart 4.9
18 year old English application rates to Sutton Trust 13 institutions for areas grouped by proportion of children living in lower income households (IDACI Quintile 5 (Q5)= lowest proportion of lower income)

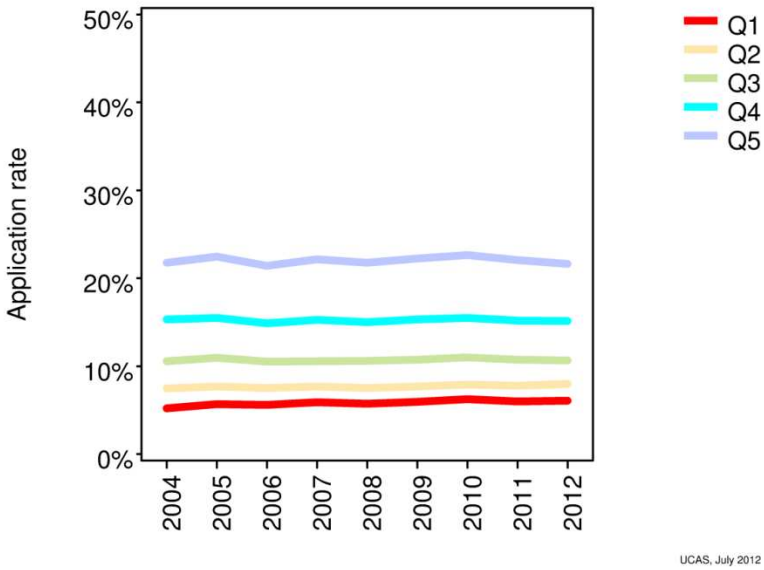
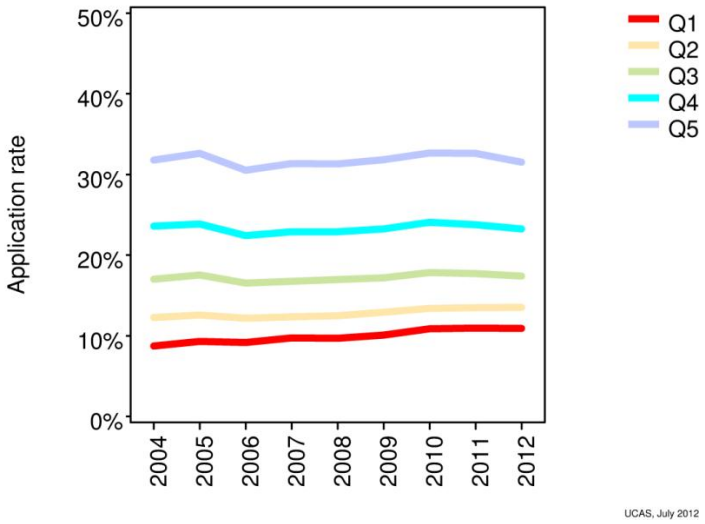


Chart 4.10

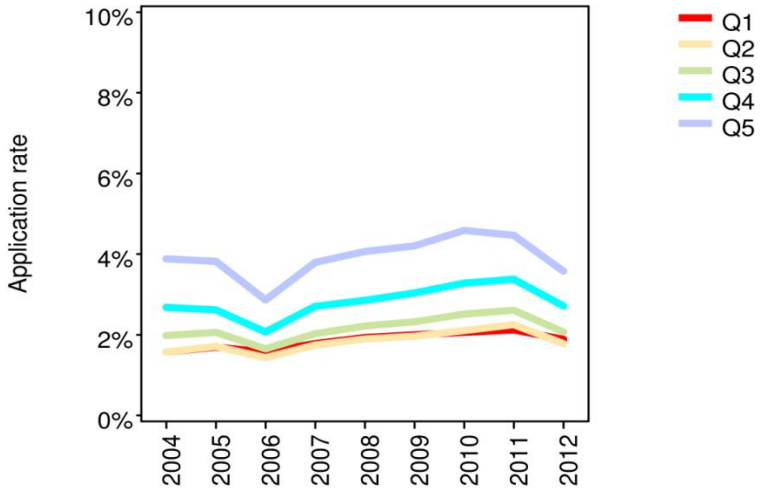
18 year old English application rates to Sutton Trust 30 institutions for areas grouped by proportion of children living in lower income households (IDACI Quintile 5 (Q5)= lowest proportion of lower income)



UCAS, July 2012

Chart 4.11

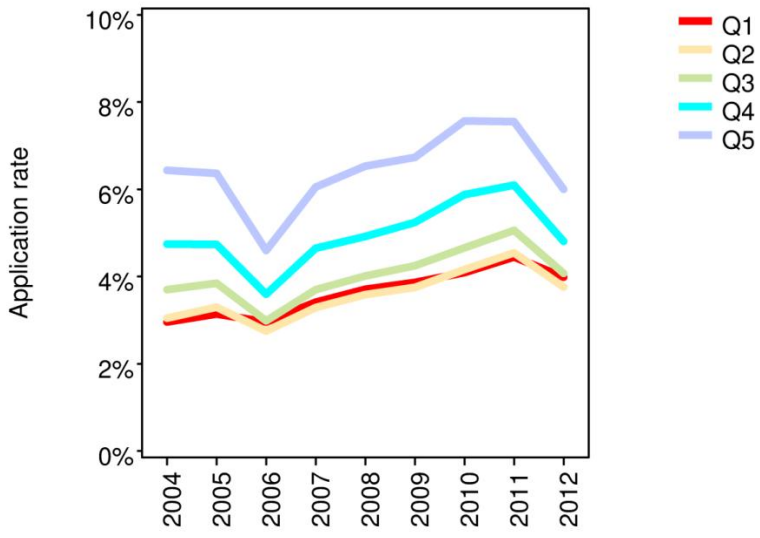
19 year old English application rates to Sutton Trust 13 institutions for areas grouped by proportion of children living in lower income households (IDACI Quintile 5 (Q5)= lowest proportion of lower income)



UCAS, July 2012

Chart 4.12

19 year old English application rates to Sutton Trust 30 institutions for areas grouped by proportion of children living in lower income households (IDACI Quintile 5 (Q5)= lowest proportion of lower income)



UCAS, July 2012

Overall, this further UCAS analysis looking at the trends of applications to highly selective universities does not indicate that those from poor or middle-income backgrounds are being more adversely impacted than those applicants from more advantaged backgrounds.

5. **Other areas of UCAS analysis**

UCAS' recent analysis of application data has also covered several areas where we have not performed any independent analysis. We welcome this additional analysis, which covers some important areas.

In particular we have not studied the relationship between applications and the variable level of fees charged by UK institutions, nor whether applicant choices have moved towards subjects of study with higher reported salaries in response to the higher level of fees

In relation to fee levels UCAS have reported that there has been no significant change in applications towards lower or higher fee courses when compared to the choices made by applicants in previous cycles. UCAS also show that the distribution of courses confirms that a large proportion of courses in England are offered at or near the maximum £9,000 fee (the average tuition fee applied to by English applicants is £8,527). In our view this means that the 'market place' in tuition fees is perhaps less informative than originally expected given the high number of institutions that have chosen to charge the maximum level.

We also have not considered independently the propensity of applicants to indicate that they intend to live at home for study. UCAS found that there have been no significant changes in the trends for students wishing to live at home.

6. Other areas of potential interest where we have performed an initial analysis, but are not able to report further at this stage

In addition to the work referred to in sections 1 to 4 above, we have looked at additional data fields on applications and applicants, and done a preliminary analysis of certain other factors which, we believe, may need to be tracked over the coming years. We have discussed these issues with UCAS, and will work with them to produce further analysis if we believe it is required. At this stage we are not in a position to publish any detail since the more complex nature of these factors and their capture through the UCAS data means that sound conclusions needs more detailed analysis The factors which we have examined are:

i. Applicants by parental HE experience

As part of the application process, applicants are asked whether their parents, step-parents or guardians have undertaken a course at higher education level. . A high and variable proportion of applicants choose the 'I prefer not to say' option to this question and any patterns need to be considered with the underlying changing demographics by parental education. For these reasons it is not possible to have firm conclusions at this stage but parental education is an important dimension of advantage and will need to be looked at in depth at a later stage.

ii. Applicants by socio-economic group (parental profession)

The data includes a measure of applicants' socio-economic group (SEG), based on the occupation of the highest paid parent, step-parent or guardian, for 2010 onwards.
No firm pattern emerges from this analysis, and the self-reported nature of this measure together with advice from UCAS that time-series can be misleading due to changes in the capturing of this information through job titles make us cautious. In addition, the changing demographics of young people by this classification, in particular the effect of increases in unemployment, means that no conclusions can be drawn at this stage. However the question of whether young people from such backgrounds are becoming less willing to apply to higher education, with the increase in fees contributing to more general financial uncertainty, is important. Again we feel this is an important dimension of advantage and needs more in depth analysis after the end of the cycle.

iii. Applicants by school type

We have looked at the pattern of applicants by the type of schools from which they come.
The widespread changes to recorded school types in recent years (notably schools becoming Academies) makes the calculation of like for like trends difficult. A significant number of students also apply as individuals rather than through schools, typically when they apply at a slightly older age. No particularly strong patterns were seen, but we will continue to monitor this area as the effects on the trends of these issues becomes better understood.

iv. Applications by subject

Each applicant can apply for up to five courses and, for most applicants, UCAS derives a 'preferred subject group'. There are marked differences between subjects, and for males and females,

between 2010 and 2012. UCAS have released a separate analysis on subject matter preferences referred to in section 5 above. As our data also contained information relating to HNDs, for example, it can be difficult to draw conclusions on the data for certain subjects which have a large number of students studying for HNDs or Foundation Degrees.

v. Applicants by Gender

We have also made an initial assessment by gender. In all four years, there were significantly more female applicants than males. The pattern of change over time for males and females was similar, although with some indication that the number of female applicants is holding up better than for male applicants.

There are substantially more females than males in the "twenty and over" group. The number of applicants aged 20 and over increased by 50% from 2009 to 2010, with a further small increase in 2011. Numbers fell back slightly in 2012.

UCAS' analysis of January application rates[7] showed that men were substantially under-represented amongst UCAS applicants and that there were signs that this gap was increasing for 2012.

[7] http://www.ucas.com/about_us/media_enquiries/media_releases/2012/300112b

7. Findings

i. Overall numbers of applicants

In Scotland, Wales and, to a lesser extent, Northern Ireland, the number of applicants aged 20 and over increased between 2010 and 2012. In contrast, the number of such applicants in England fell by over 10%. The number of younger applicants (those aged up to 19) decreased by 7% in England during this period, but by only 1-2% in the other countries. For all age groups combined, the decline in England was 8.8% compared to a roughly constant level in the rest of the UK. Although a significant portion of the absolute decline in application numbers can be accounted for by a change in the cohort population size, the relative decline in English applications raises concerns about the impact of increased fees.

ii. Application rates

Data on longer term trends in application rates, released by UCAS, demonstrates a fall in application rates for young English applicants in 2012, both in absolute terms and relative to the rest of the UK. The fact that this fall was more pronounced for 19 year olds than 18 year olds is difficult to explain at this stage, since there was no apparent increase in the 18 year old application rate in the prior year.

iii. Applicants from areas of advantage/ disadvantage

The decline in applicants appears to have been proportionately higher in areas of high participation and low deprivation. Thus communities with low progression to higher education have seen a smaller percentage drop in applications. However the UCAS analysis demonstrates that once the trend rate of growth is taken into account, the declines in applications can be seen as having affected all neighbourhood types to approximately the same extent.

iv. Applicants to selective universities

There has been a decrease in raw applications to those universities with relatively high entry requirements, when compared to less selective universities. These figures relate to applications, and an applicant can make up to five applications. The further analysis done on our behalf by UCAS indicates that, for eighteen year olds, there are no fewer applicants (relative to the population) choosing to apply to at least one ST30 or ST13 universities. There is, however, a drop-off in the application rate from 19 year olds, mirroring the trend seen across applications to all institutions, and a significant fall in applications from Northern Ireland. We should continue to monitor these patterns.

v. General

The findings in this report come from our independent look at the UCAS applications data covering the new tuition fee arrangements. There are some indications that the patterns of applications may change but it is too early to conclude what the impacts of these significant fee increases are.

This report, and UCAS' publication on how applications have changed, address many key questions about demand for higher education in 2012. However, there are still further questions to be addressed. In particular we have highlighted some of the factors which need further analysis before a sound assessment of changes can be made. The Commission intends to continue to work in close cooperation with UCAS to develop the analysis for these more difficult factors.

The Commission faces a challenging task over the next three years to determine the extent to which any of the early observed changes reported here can be attributed to increased fee levels,

and which groups of applicants – and potential applicants who decide not to apply to university - are most affected.

Over the next three years application and admissions trends will be monitored to provide an independent and impartial check on the reforms. These analyses will be combined with evidence from other sources to ensure the Commission is taking an informed view. This report has highlighted some areas that the Commission will keep a close eye on over the coming months.