



END OF CYCLE REPORT 2018

Geography

CHAPTER 5

UCAS

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1. INTRODUCTION

This report is part of the third release of UCAS' End of Cycle Reports for the 2018 undergraduate admissions cycle.

As an independent charity, UCAS publishes timely data and analysis about demand for and admission to higher education, to contribute to public debate about education, access, and social mobility.

This year, we are publishing our end of cycle data and analysis in four releases, between 29 November and 31 January 2019, with the first release published 25 working days after the 2018 cycle closed. So far, we have published chapters one to four, covering summaries of applicants and acceptances, offer-making, unconditional offer-making, and applicant characteristics.

This release covers qualifications and geographical differences, and we have also now published a series of reference tables and data sets for the 2018 cycle. On 31 January, we will publish end of cycle provider-level application data, together with provider-level data on unconditional offer-making.

This year, over half a million people from across the UK and the rest of the world were accepted into higher education through UCAS. Most applicants are from the UK, and accept places at providers located in their home country, but a substantial number accept places at providers located elsewhere in the UK. Rates of application and acceptance into higher education can also differ between geographic regions, and a significant proportion of applicants to UK providers come from outside the UK.

This chapter looks at the trends in applicants and acceptances to UCAS for all courses and from all ages (except when otherwise stated), and how these differ geographically. Applicants from outside the UK are grouped based on their European Union (EU) status, as this can affect tuition fee levels and other funding opportunities available to them. As the reported patterns and trends are summarised across all providers, they do not necessarily reflect the case at any given higher education provider.



2

APPLICANTS AND ACCEPTANCES BY PROVIDER COUNTRY



2.1 Fewer applicants to providers in England than in 2017, but England remains attractive to international undergraduate students

This year, 615,555 people applied to at least one provider in England – a fall of 0.6 per cent from 2017.

Figure 1 shows the total number of acceptances to providers in England, split by applicant domicile. Total acceptances have remained relatively stable since 2015, with 449,270 acceptances to providers in England this year – 0.2 per cent more than in 2017.

The majority of acceptances to English providers are from applicants domiciled in England (373,100 – 83.0 per cent), with the rest of the UK contributing to 3.0 per cent of the total. This gives English providers the lowest proportion of UK acceptances from outside of their home domicile. This is not surprising, as both Scottish and Northern Irish applicants can benefit from lower tuition fees by remaining in their home country: Scottish domiciled applicants studying in Scotland can do so without paying tuition fees, and applicants domiciled in Northern Ireland pay up to £4,160 if they study in Northern Ireland, rather than up to £9,250 if they study elsewhere in the UK.

Total acceptances to English providers from all four countries of the UK fell, with the small increase in total acceptances due to increases from outside the UK. In keeping with longer term trends, acceptances from EU domiciled applicants increased by 6.2 per cent to 26,090 (5.8 per cent of all acceptances), and acceptances from outside the EU increased by 5.6 per cent to 36,755 (8.2 per cent of all acceptances).

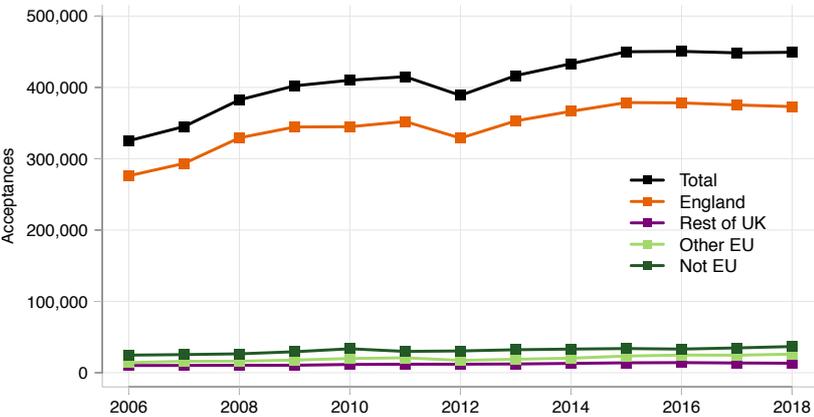


FIGURE 1:
Acceptances to providers in England by domicile (2006 – 2018)

2.2 Increase in total acceptances to providers in Scotland, but a decrease in applicants from the EU

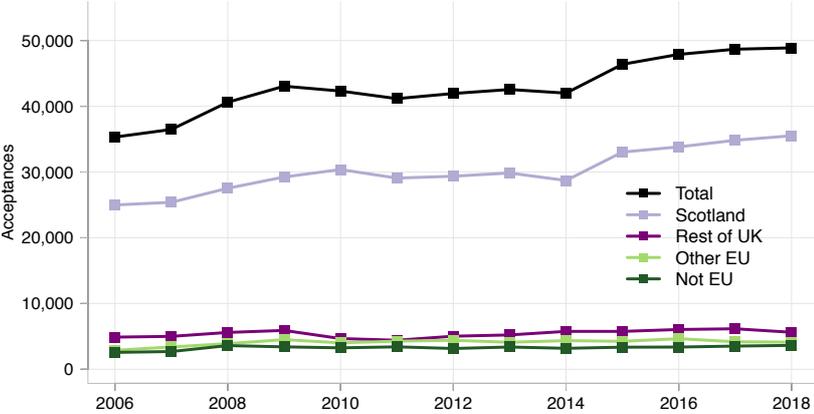
This year, 126,930 people applied to at least one provider in Scotland (up 0.2 per cent from last year). Figure 2 shows the total number of acceptances to providers in Scotland, split by applicant domicile. In 2018, there were 48,885 acceptances to providers in Scotland – 0.4 per cent more than in 2017, in keeping with the steady rise in acceptances to Scottish providers since 2014.

Applicants domiciled in Scotland represent the majority of acceptances to Scottish providers (35,515 – 72.6 per cent), and mostly account for the rise in total acceptance numbers. This increase in acceptances from Scottish applicants to providers in Scotland occurred despite there being a 0.3 per cent decrease in the number of Scottish applicants.

Acceptances to Scottish providers from EU applicants fell by 1.3 per cent to 4,120 (8.4 per cent of all acceptances), and acceptances from outside the EU increased by 3.1 per cent to 3,630 (7.4 per cent of all acceptances). Rising acceptance numbers from Scottish and non-EU applicants may be due to decreasing acceptances by applicants from the rest of the UK. The significant majority, 95.7 per cent, of acceptances from Scotland domiciled applicants were to Scottish providers. This high number is expected, as Scottish domiciled applicants who study in Scotland do not pay tuition fees (in most cases).

The number of EU domiciled applicants to Scottish providers fell in both 2017 (by 3.4 per cent) and 2018 (by 1.8 per cent). The Scottish government has confirmed that EU students who begin their studies in the 2019/20 academic year will continue to receive free tuition for the duration of their studies¹.

FIGURE 2:
Acceptances to providers in Scotland by domicile (2006 – 2018)



¹ <https://news.gov.scot/speeches-and-briefings/ministerial-statement-supporting-people-to-study-in-scotland>

2.3 Total acceptances to providers in Northern Ireland

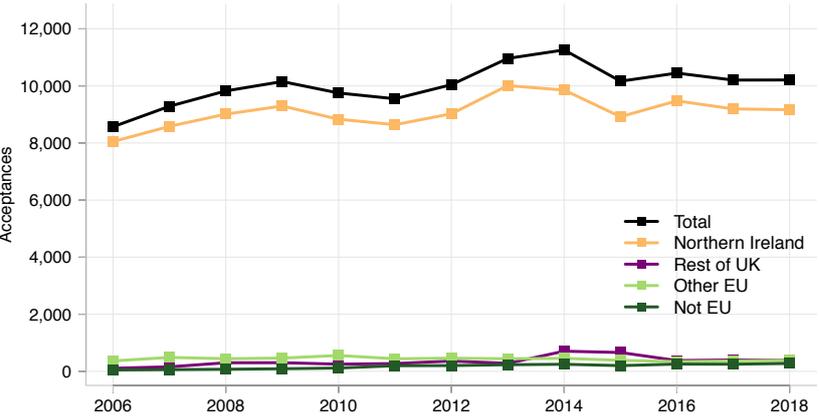
remain stable, despite number of applicants

falling steadily since 2015

Northern Ireland has four higher education providers who use the UCAS undergraduate scheme. This year, 24,015 people applied to at least one provider in Northern Ireland. This is a fall of 2.5 per cent from last year, and the number of applicants to providers in Northern Ireland has fallen steadily since 2015, in line with a falling population of 18 year olds from 2015 onwards. Figure 5 shows the total number of acceptances at providers in Northern Ireland, split by applicant domicile. The total number of acceptances (10,210) is similar to the number in 2017 (10,205). Applicants domiciled in Northern Ireland represent the majority of acceptances to providers in Northern Ireland (89.8 per cent), with Northern Ireland having the highest proportion of home domiciled students in the UK. Acceptances from outside the EU increased by 10.4 per cent to 275. Acceptances from EU applicants increased by 5.5 per cent to 385. However, most EU acceptances to Northern Ireland are from the Republic of Ireland (86.7 per cent – much higher than in Scotland (11.6 per cent), England (3.4 per cent), or Wales (5.1 per cent)), and the small number of non-Irish EU acceptances has remained unchanged from 2017 to 2018. Although Northern Ireland has the highest proportion of home-domiciled acceptances, 35.1 per cent of Northern Irish acceptances are to providers outside of Northern Ireland.

FIGURE 3:

Acceptances to providers in Northern Ireland by domicile (2006 – 2018)



2.4 Number of applicants and acceptances to providers in Wales decrease

This year, 71,455 people applied to at least one provider in Wales. This is a fall of 6.3 per cent from last year, and the second year in a row of declining total applicant numbers (following a 6.2 per cent fall from 2016 to 2017). Figure 4 shows the total number of acceptances to providers in Wales, split by applicant domicile.

Wales is the only UK country with falls in the number of acceptances across all categories of applicant domicile, with Welsh domiciled acceptances falling by 3.5 per cent, acceptances from the rest of the UK falling by 6.0 per cent, acceptances from the EU falling by 20.8 per cent, and non-EU acceptances falling by 6.5 per cent. Wales is also the only UK country with a drop in total acceptances from 2017 to 2018, with a fall of 5.7 per cent to 25,000. Although the total number of applicants has fallen for the last two years, it is only this year that this has been followed by a decrease in acceptances. Less than half of acceptances are from Welsh applicants (Welsh applicants account for 47.8 per cent of acceptances to Welsh providers, with 41.0 per cent coming from the rest of the UK).

Welsh applicants are the most likely to study outside their home country, with 40.4 per cent of their acceptances being to providers in England, Scotland, or Northern Ireland. In contrast to Scotland and Northern Ireland, where there are financial incentives for applicants to remain in their home domicile, there is more of an open market between English and Welsh higher education providers.

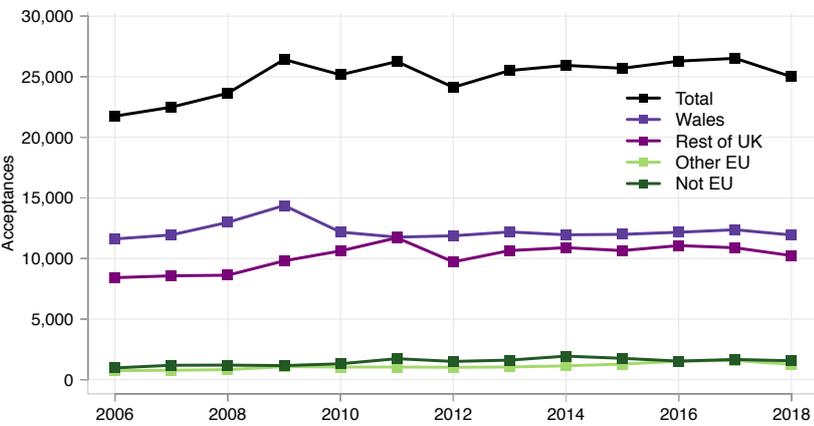


FIGURE 4:
Acceptances to providers in Wales by domicile (2006 – 2018)

3. HOME COUNTRY ENTRY AND APPLICATION RATES

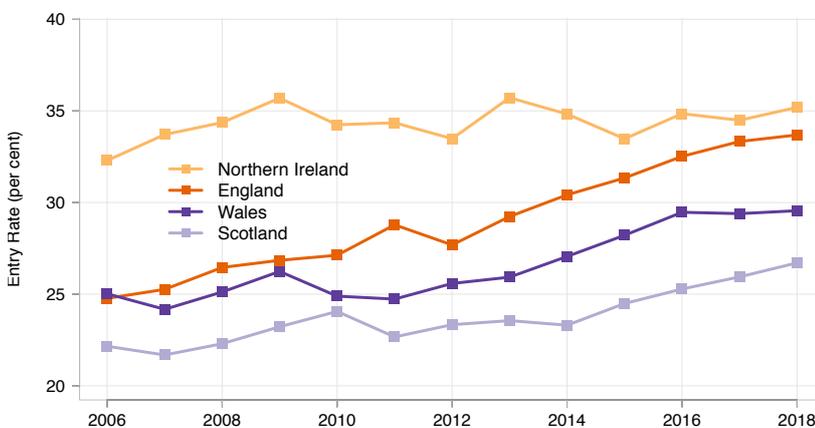
3.1 Entry rates rise in all four countries of the UK

The acceptance numbers described above do not take changes in population size into account. The number of 18 year olds in the UK has fallen each year from 2015 to 2018, and overall figures as reported above are affected by the falling number of school leavers. To enable a year-on-year comparison, entry rates for UK 18 year olds as a percentage of the UK 18 year old population can be used. Figure 5 shows entry rates for 18 year olds domiciled in each UK country, defined as the percentage of 18 year olds from each region who are placed in higher education by the end of the cycle.

Scottish domiciled 18 year olds had the lowest entry rate, with 26.7 per cent accepting places through UCAS (although not all higher education in Scotland is recorded by UCAS, as detailed in the note at the end of this chapter). Although low, this is 0.8 percentage points more than in 2017, and the Scottish entry rate has risen each year since 2014. England had an entry rate of 33.7 per cent, and England has had the longest continuous rise in entry rate – increasing each year since 2012. Northern Ireland and Wales had entry rates of 35.2 per cent and 29.6 per cent respectively, both of which are similar to their levels from two years ago. However, Northern Ireland still has the highest entry rate of all UK countries. Increasing entry rates may be partly explained by a decreasing number of 18 year olds competing for a similar number of places as in previous years.

FIGURE 5:

Entry rates by UK country (2016 – 2018)



4



**ACCEPTANCES
AND ENTRY RATES
FOR ENGLISH
REGIONS**

4.1 London continues to have the highest higher education entry rates in the UK

Figure 6 shows 2018 entry rates for different regions of England, as well as Scotland, Wales, and Northern Ireland. This year, entry rates for those domiciled in London are the highest, with 42.4 per cent of London-based 18 year olds entering higher education in 2018 (0.7 percentage points more than in 2017). This means that 18 year olds from London were 32 per cent more likely than 18 year olds from elsewhere in England to be accepted into higher education this year.

FIGURE 6:
Entry rates in 2018 for UK 18 year olds by region and country

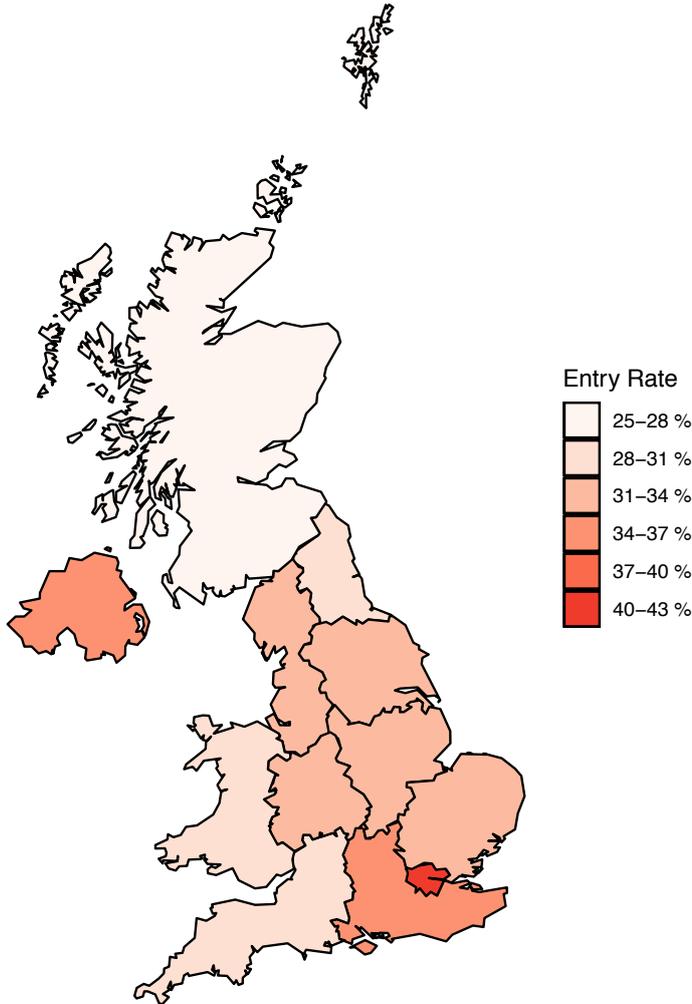
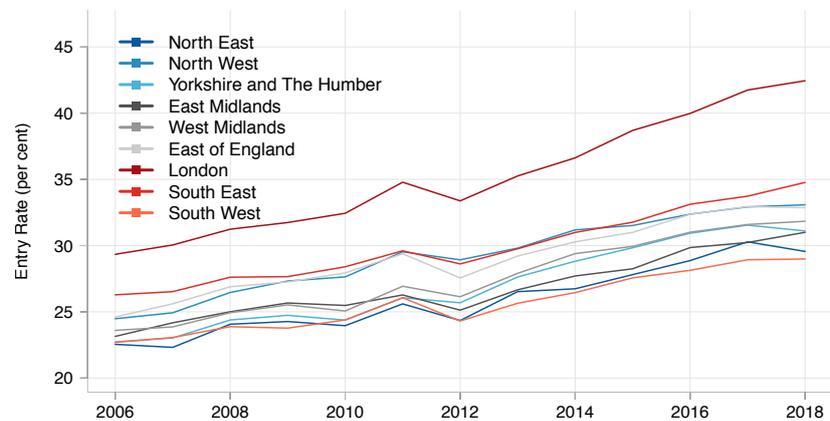


Figure 7 shows 18 year old entry rates from 2006 to 2018 for each English region. Six regions had higher entry rates in 2018 than 2017, with the East of England, the North East, and Yorkshire and the Humber having decreases (of 0.1, 0.7, 0.4 percentage points respectively). These decreases come after five years of consistent entry rate increases for every region of England from 2012 to 2017. The biggest increases in entry rate this year were in the South East (1.0 percentage point), East Midlands (0.8 percentage points), and London (0.7 percentage points). The South West, North West, and West Midlands had increases of 0.1, 0.2, and 0.2 percentage points respectively. This year, applicants were assigned to English regions based on their declared home address, rather than by correspondence address (to avoid issues caused by missing or invalid correspondence addresses). As this is a different method to that used last year, some numbers differ from those reported last year by small amounts (maximum 0.1 percentage point).

FIGURE 7:

2006 – 2018 entry rates for English regions



4.2 Applicants from Northern Ireland are the most likely

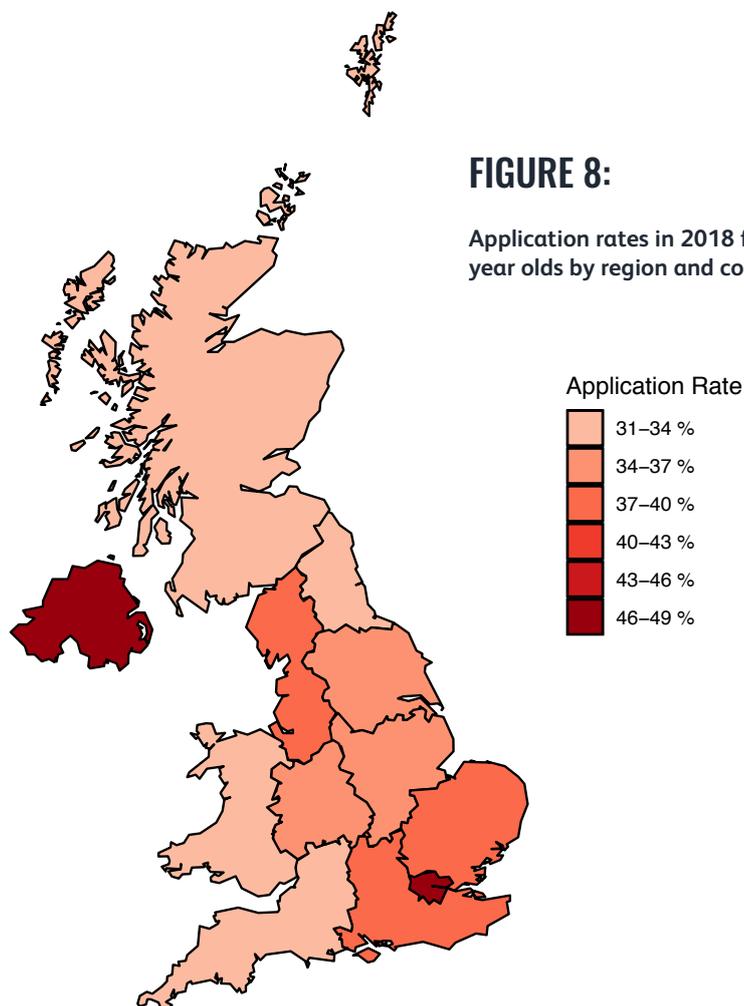
to turn down offers from UK providers

Figure 8 shows the application rates for 18 year olds in Scotland, Northern Ireland, Wales, and the different regions of England, as a percentage of the 18 year old regional population. The three English regions with drops in entry rates are also the only three English regions with drops in application rates (East of England down 0.4 percentage points, North East down 1.2 percentage points, and Yorkshire and the Humber down 0.6 percentage points). The application rate for England as a whole was 38.8 per cent. The South East and London are the only regions with higher application rates than this average (with 40.0 per cent and 48.9 per cent respectively).

Northern Ireland and Scotland both had small decreases in the 18 year old application rate (of 0.1 and 0.2 percentage points respectively), but increases in acceptance rates (of 0.7 and 0.8 percentage points respectively). Again, the rate is highest in London, where 48.9 per cent of 18 year olds apply to higher education (1.0 percentage point higher than in 2017). Northern Ireland also has a high application rate, with 47.7 per cent of 18 year olds applying. The Northern Ireland entry rate of 35.2 per cent is therefore comparatively low (despite being the highest outside London), as it means applicants from Northern Ireland have the lowest acceptance rate (73.7 per cent). However, Northern Irish applicants are more likely to be made offers, but do firmly accept offers at a lower rate (74.3 per cent) than the rest of the UK (78.9 per cent, 82.6 per cent, and 84.3 per cent for England, Scotland, and Wales respectively). This suggests that the lower rate of entry for Northern Irish applicants is at least partly due to them being more likely to turn down all their offers.

Although Wales has the lowest application rate (33.3 per cent), it has the highest acceptance rate (88.8 per cent).

The 18 year old entry and application rates for each parliamentary constituency are available in the data sets published alongside this release.



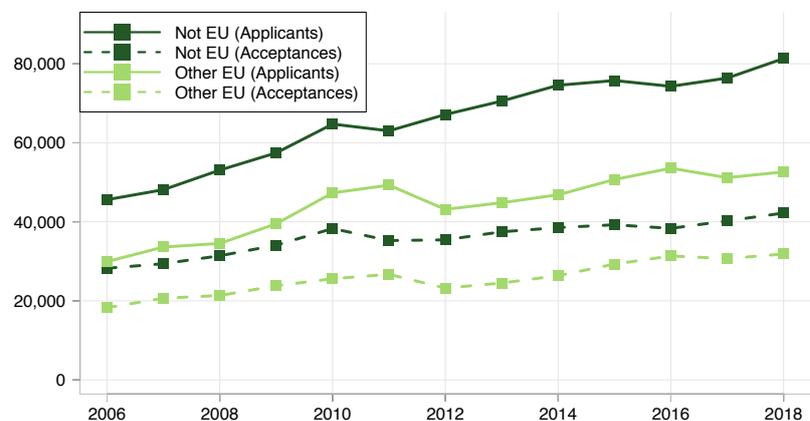
5. INTERNATIONAL APPLICANTS

5.1 Applicants and acceptances from outside the EU are the highest on record

Figure 9 shows numbers of applicants and acceptances from outside the UK, with EU and non-EU numbers separated. Both applicants (81,325) and acceptances (42,220) from outside the EU are the highest on record. The number of applicants (52,620) and acceptances (31,855) from the EU are both higher than in 2017. The number of acceptances from the EU is also the highest on record, although this is rising more slowly than non-EU acceptances, and the number of EU applicants is still lower, albeit only slightly, than in 2016.

FIGURE 9:

Applicants and acceptances from EU and non-EU domiciled applicants (2006 – 2018)

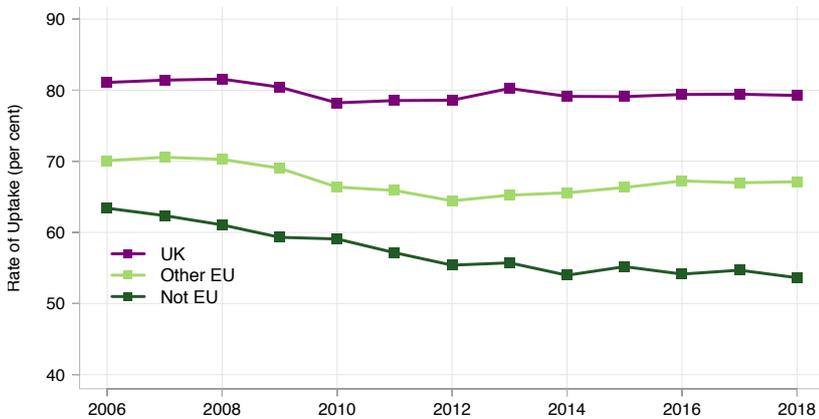


The number of non-UK applicants and acceptances may not give a complete picture of the international demand for UK higher education, as the acceptance rate does not distinguish between applicants who did not receive any offers, and applicants who turned down all their offers. Looking at the percentage of main scheme applicants who receive at least one offer, and firmly accept an offer (rate of uptake) provides insight into how often they choose not to accept a place, rather than having no choices to accept.

Figure 10 shows the rate of uptake from applicants with at least one main scheme offer, for UK, EU, and non-EU applicants. The rate of uptake for UK domiciled applicants has remained stable, at roughly 79 per cent since 2014, and the rate for non-UK EU applicants has also remained stable, at about 67 per cent since 2016. Although the total numbers of applicants and acceptances from outside the EU is the highest on record (showing the high international demand for UK higher education), the rate of uptake for non-EU applicants is the lowest on record, at 53.6 per cent. This may represent increases in higher education opportunities globally, and an increase in global competition for overseas applicants.

FIGURE 10:

Rate of uptake by applicant domicile (2006 – 2018)



5.2 There are large increases in acceptances

from several countries

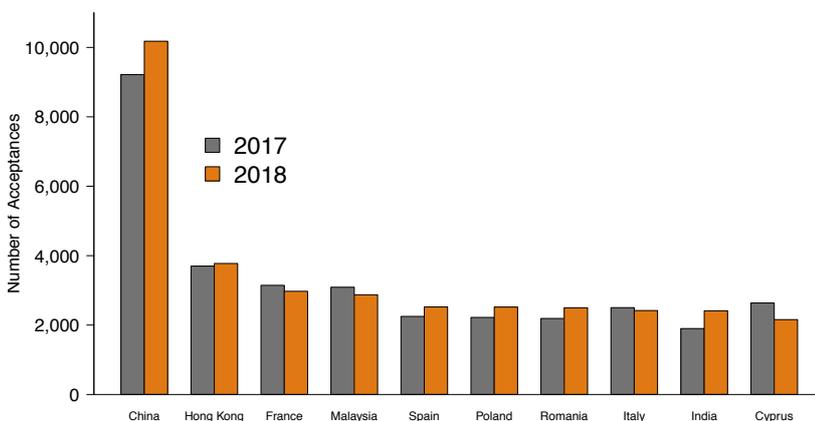
Figure 11 shows the number of acceptances for the ten countries with the most acceptances in 2018 (China, Hong Kong, France, Malaysia, Spain, Poland, Romania, Italy, India, and Cyprus). Each of these countries was also in the top ten for 2017, and all except India have been in the top ten since 2015. Several of these countries had large percentage increases from 2017. Acceptances from China increased by 10.4 per cent to 10,180, and India had a large increase of 27 per cent. Large increases were also seen for the United States of America (+185, up by 10 per cent), the United Arab Emirates (+180, up by 18 per cent), Portugal (+535, up by 45 per cent), Germany (+135, up 7 per cent), and Turkey (+180, up 42 per cent).

France, Malaysia, and Cyprus had the three largest decreases in absolute numbers of acceptances of any country, but still contribute some of the largest acceptance numbers. Large decreases in acceptance numbers were also seen for Ecuador (-75, 78 per cent), Nigeria (-115, 12 per cent), Russia (-80, 13 per cent), and Norway (-80, 8 per cent).

The large rises in acceptances from India and China coincide with prospective international applicants from these countries reporting concerns over the potential introduction of immigration controls in other countries. Alongside the increasingly global higher education market, it is possible that the large increases from these countries (and others) are partly due to the global political climate making the UK more appealing to international applicants than other nations.

FIGURE 11:

Top 10 countries (outside the UK) by number of acceptances in 2018



A note on numbers in Scotland

UCAS covers the overwhelming majority of full-time undergraduate provision for people living in England, Wales, and Northern Ireland, so the statistics on acceptances or entry rates can be taken as being very close to all recruitment to full-time undergraduate higher education.

In Scotland, there is a substantial section of higher education provision not included in UCAS' figures. This is mostly full-time higher education provided in further education colleges, which represents around one third of young full-time undergraduate study in Scotland, and this proportion varies by geography and background within Scotland. Accordingly, figures on entry rates or total recruitment in Scotland reflect only the part of full-time undergraduate study that uses UCAS.

In 2014, there were fewer very late acceptances than in other cycles recorded in the UCAS data for some Scottish providers. These changes may mean the number of applicants and acceptances to Scottish UCAS providers in 2014, recorded through UCAS, could be understated by up to 2,000, compared to how applicants and acceptances have been reported in recent cycles. This means that comparing 2014 applicants and acceptances for Scottish providers (or those from Scotland) to other cycles, may not give an accurate measure of change.

In 2015, around 120 courses at Scottish providers which were previously part of the UCAS Teacher Training scheme, moved into the UCAS Undergraduate scheme. As such, the number of applicants and acceptances to Scottish providers in 2015 recorded through UCAS will include those which were previously part of UCAS Teacher Training. This means, comparing 2015 applicants and acceptances for Scottish providers (or those from Scotland, particularly those aged 21 or over) to previous cycles, may not give a like-for-like measure of change.



GLOSSARY

Acceptance	An applicant who, at the end of the cycle, has been placed for entry into higher education.
Age	This analysis uses country-specific age definitions that align with the cut-off points for school and college cohorts in the different administrations of the UK. For England and Wales, ages are defined on 31 August, for Northern Ireland on 1 July, and for Scotland on 28 February the following year. Defining ages in this way matches the assignment of children to school cohorts. For applicants outside the UK, a cohort cut-off of 31 August has been used.
Applicant	A person who has made an application in the UCAS system. Counts of applicants include those applying through the main scheme, late applicants direct to Clearing, and Records of Prior Acceptance (RPAs).
Base population estimate	The population estimates are based on Office for National Statistics mid-year estimates, and national population projections (published in June 2015). For 16 to 20 year olds, the estimates are obtained by ageing 15 year olds from the appropriate number of years earlier. This approach avoids the estimates being susceptible to changes in net migration (including overseas students) during these ages. Older ages are obtained from the mid-year estimates, and national population projections without ageing. In both cases, the estimates are adjusted from age at mid-year to age on the country-specific reference dates, using the monthly distribution of births. Analysis of application and entry rates by area-based background are supported through small area population estimates, available from the Office for National Statistics, National Records for Scotland, and the Northern Ireland Statistics Research Agency. These small area population estimates have been revised to be consistent with the national level population estimates.
Clearing	An acceptance route available late in the application cycle.
Domicile	Declared area of permanent residence.
Entry rate	Number of acceptances from a UCAS application cycle divided by the estimated base population.
Main scheme	The main UCAS Undergraduate application scheme through which up to five course choices can be applied for. This opens in September, and closes to new applications on 30 June the following year.
Non-EU	Countries outside the European Union, including the Channel Islands and the Isle of Man.
Provider	A higher education provider – a university or college.
Rate of uptake	The proportion of main scheme applicants holding at least one offer, who select one of those offers as their firm (or first) choice.
UK	United Kingdom. Excludes the Channel Islands and the Isle of Man.

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The UCAS logo is displayed in white text on a dark grey background. The letters 'UCAS' are in a bold, sans-serif font. The letter 'A' is stylized with a red diagonal line through it.