

# unipol

## What's Happening with Student Numbers? Insights for the 2024/2025 Academic Year

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16<sup>th</sup> August 2024



# Today

- How are UK student numbers holding up?
- International students – is there any more data to support the initial fears of a significant reduction in numbers?
- What impact might riots have?
- What impact of wider geo-political factors on the attractiveness of UK Higher Education?
- Is there a new China? Future predictions on International student intakes

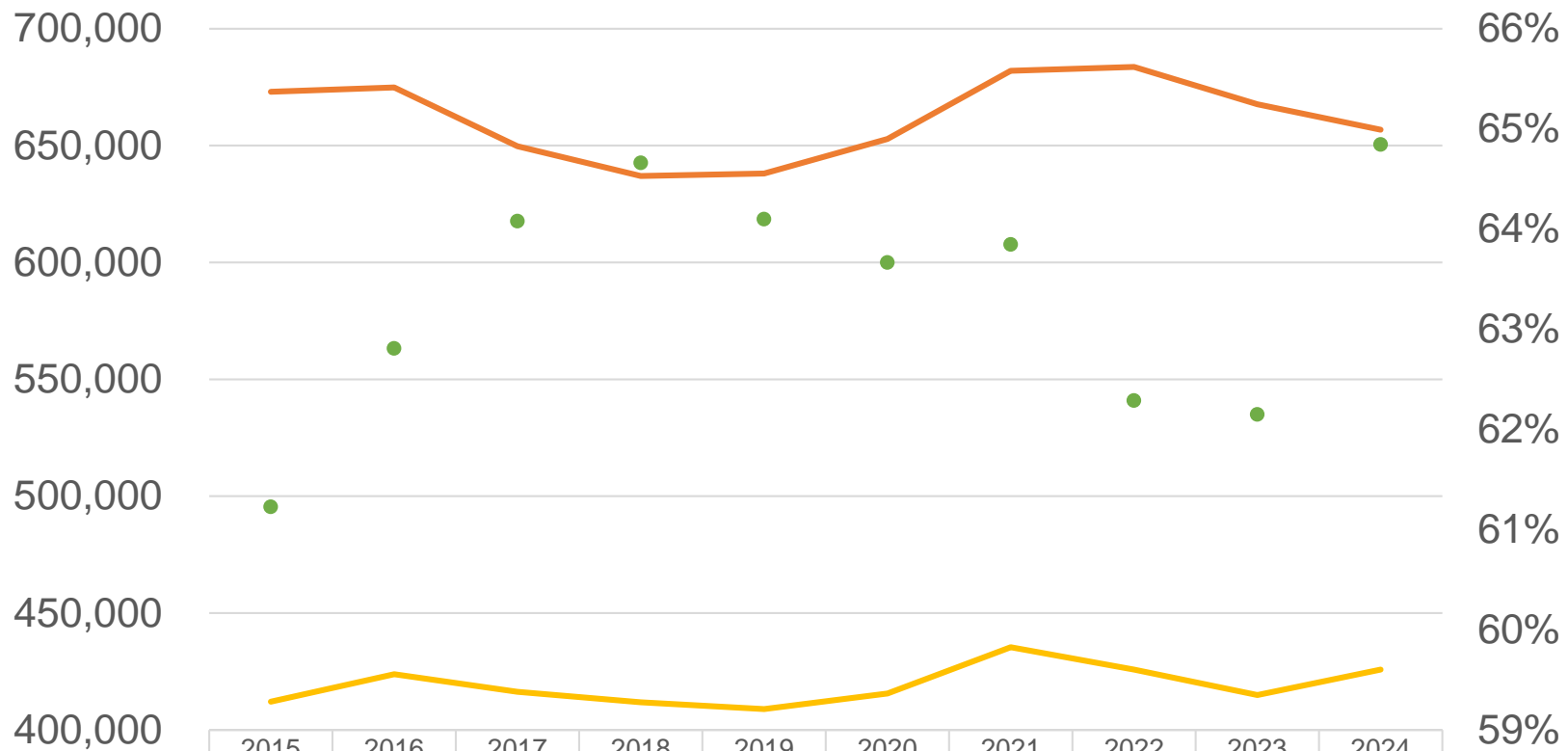
# Focus of analysis

Full-time student recruitment cycle, autumn 2024

UCAS applicant (30 June deadline) and acceptance data

- Overall numbers
- UK 18-year olds
- Applicants from most disadvantaged backgrounds (TUNDRA Quintile 5)
- UK regions
- Acceptance rates

# All applicants and acceptances (all ages and domiciles) 2015-24 (30 June deadline)



**All UCAS**

**Applicants**

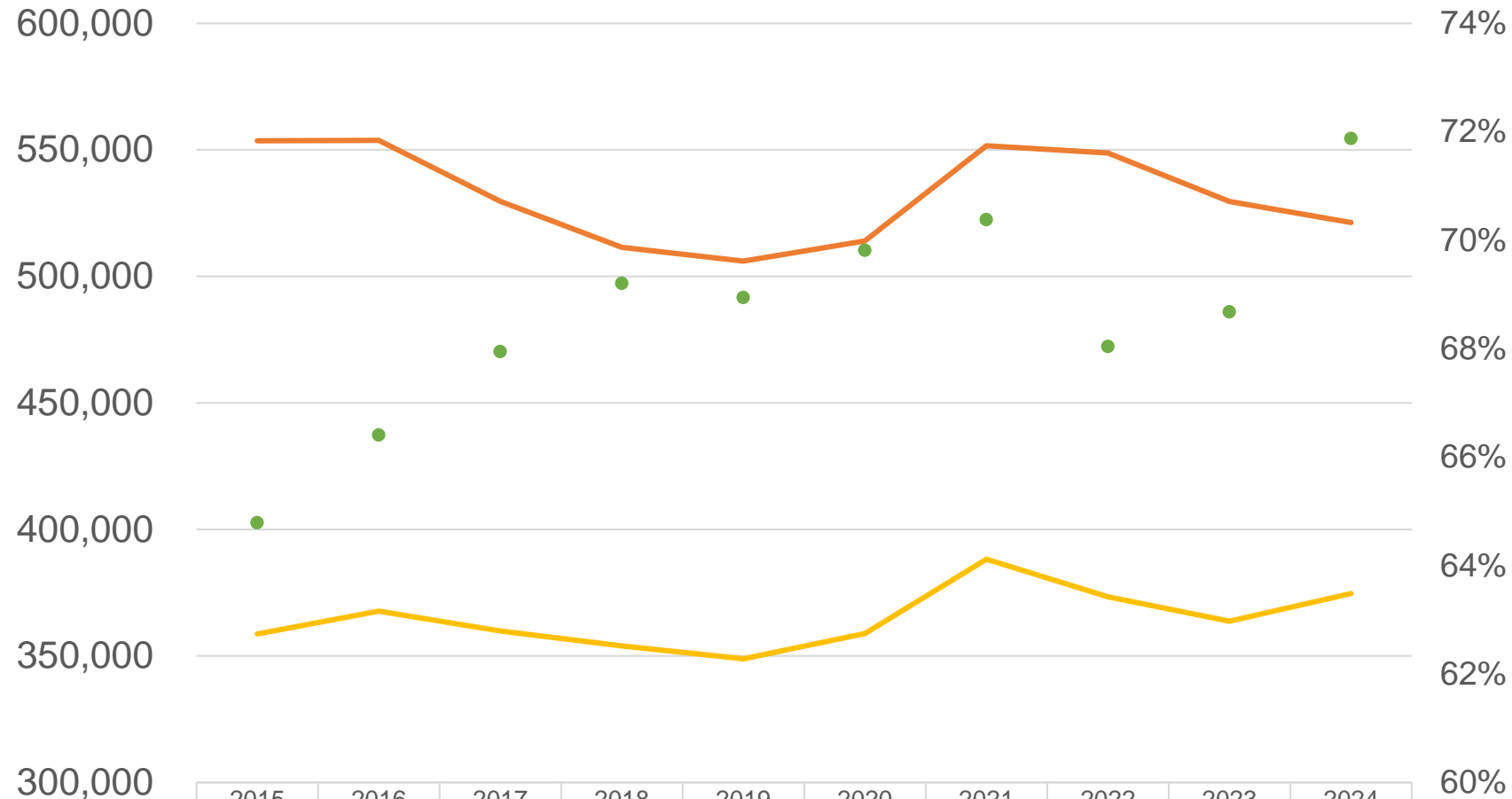
- -1.6% on 2023
- -2.9% on 2015

**Acceptances**

- +2.6% on 2023
- +3.3% on 2015

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Overall applicant numbers	673,040	674,890	649,700	636,960	638,030	652,790	682,010	683,650	667,650	656,760
Overall acceptance numbers	412,080	423,880	416,310	411,860	408,960	415,600	435,430	425,830	414,940	425,860
Acceptance/applicant rate	61.2%	62.8%	64.1%	64.7%	64.1%	63.7%	63.8%	62.3%	62.1%	64.8%

# UK applicant numbers acceptances and acceptance rates 2015-24



**Home students**

**Applicants**

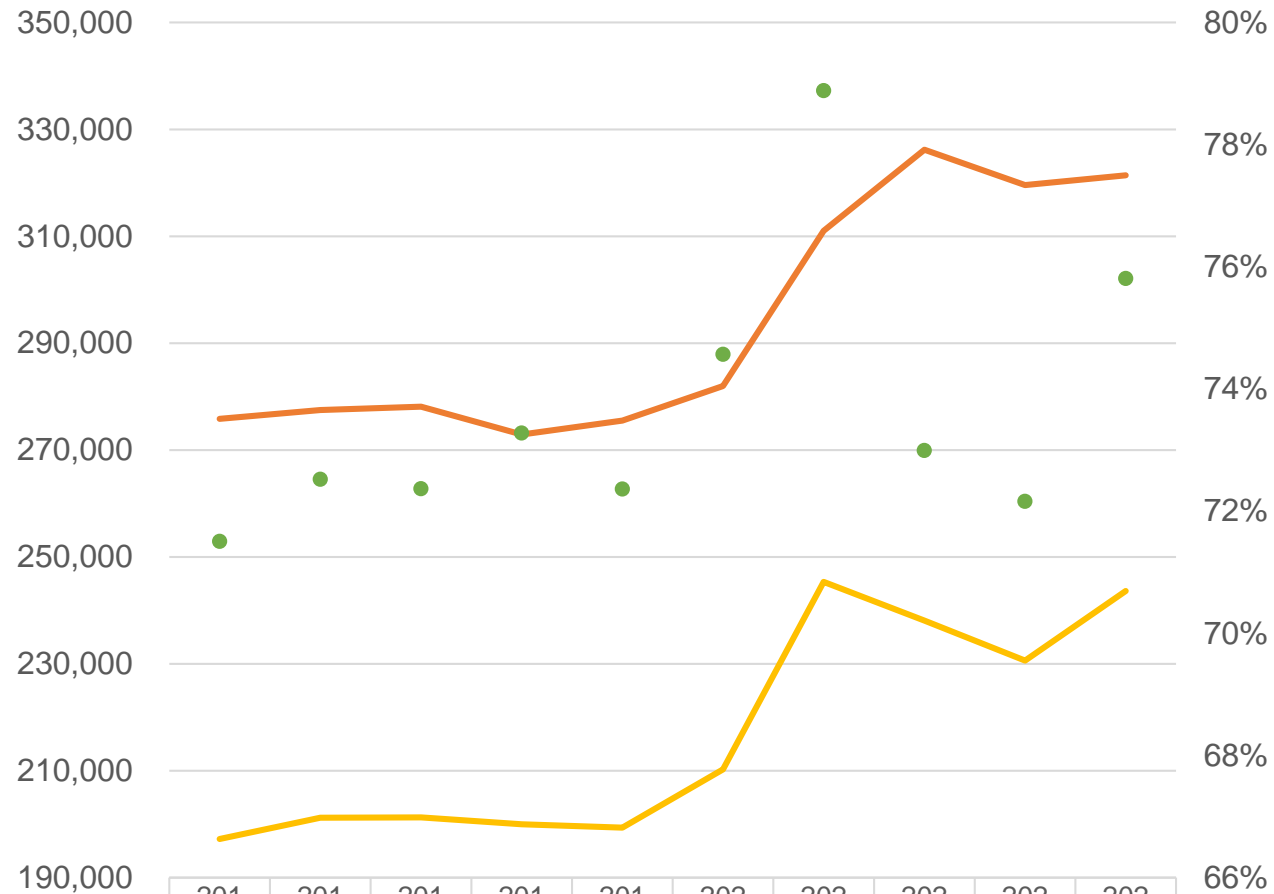
- -1.6% on 2023
- -5.8% on 2015

**Acceptances**

- +3% on 2023
- + 4.5% on 2015

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Applicants	553,590	553,740	529,620	511,460	506,040	514,020	551,620	548,780	529,600	521,300
Acceptances	358,680	367,730	359,860	353,960	348,890	358,860	388,230	373,390	363,730	374,690
Acceptance/applicant rate	64.8%	66.4%	67.9%	69.2%	68.9%	69.8%	70.4%	68.0%	68.7%	71.9%

# UK 18-year-old applicant numbers (30 June deadline), acceptances and acceptance rates 2015-24



	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Applicant numbers	275,8	277,4	278,1	272,9	275,5	281,9	311,0	326,1	319,5	321,4
Acceptance numbers	197,2	201,2	201,2	199,9	199,3	210,2	245,3	238,0	230,6	243,6
Acceptance/applicant rate	71.5%	72.5%	72.4%	73.3%	72.4%	74.6%	78.9%	73.0%	72.2%	75.8%

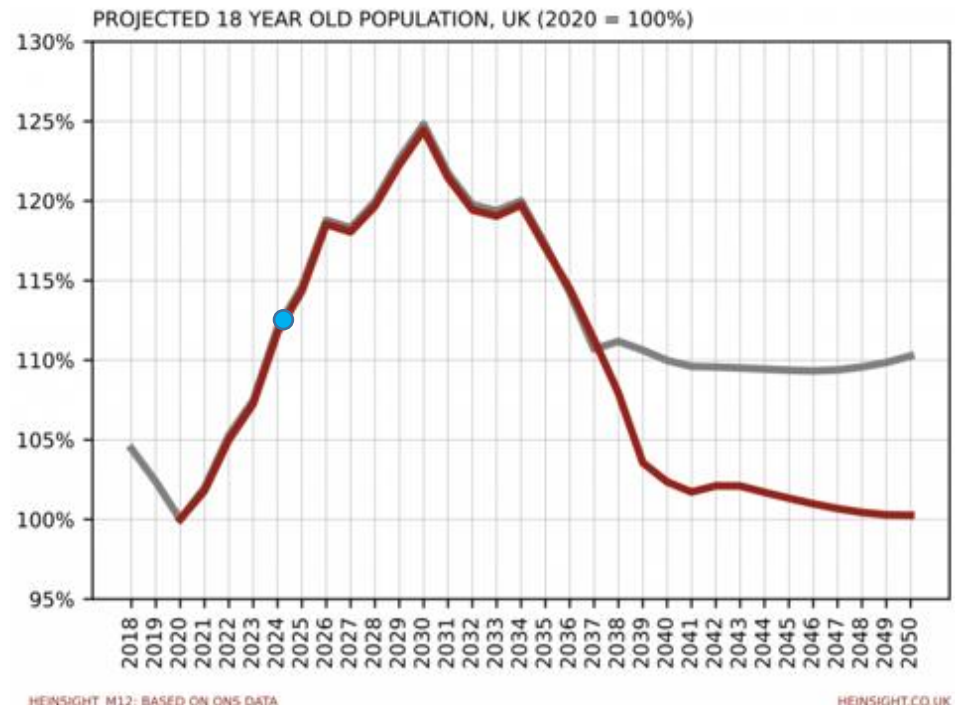
**18 year olds**

**Applicants**

- +0.6% on 2023
- +16.5% on 2015

**Acceptances**

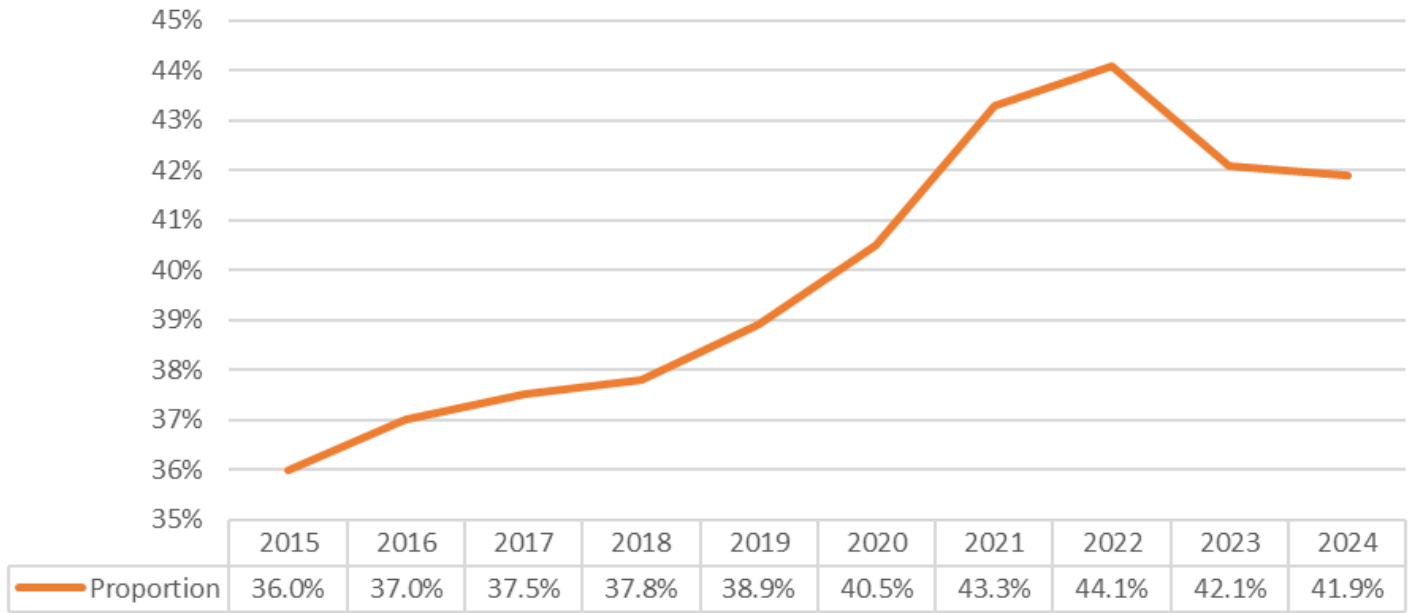
- +5.7% on 2023
- +23.5% on 2015

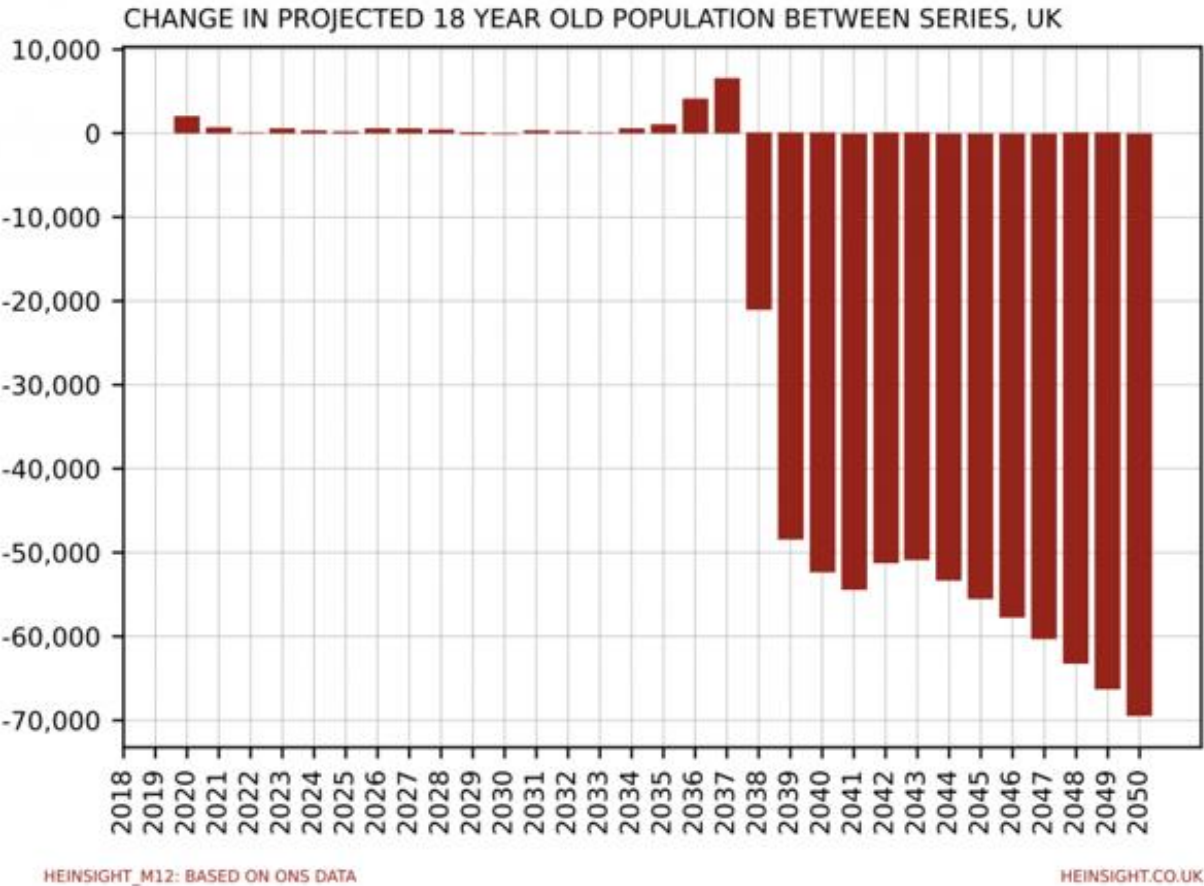


(HE Insight, Jan 2022)



### Proportion of the UK's 18-year-old population who made an application by 30 June deadline



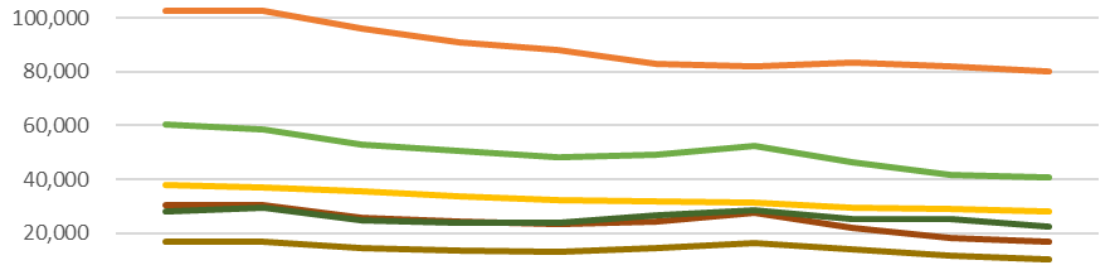


HEINSIGHT\_M12: BASED ON ONS DATA

HEINSIGHT.CO.UK

(HE Insight, Jan 2022)

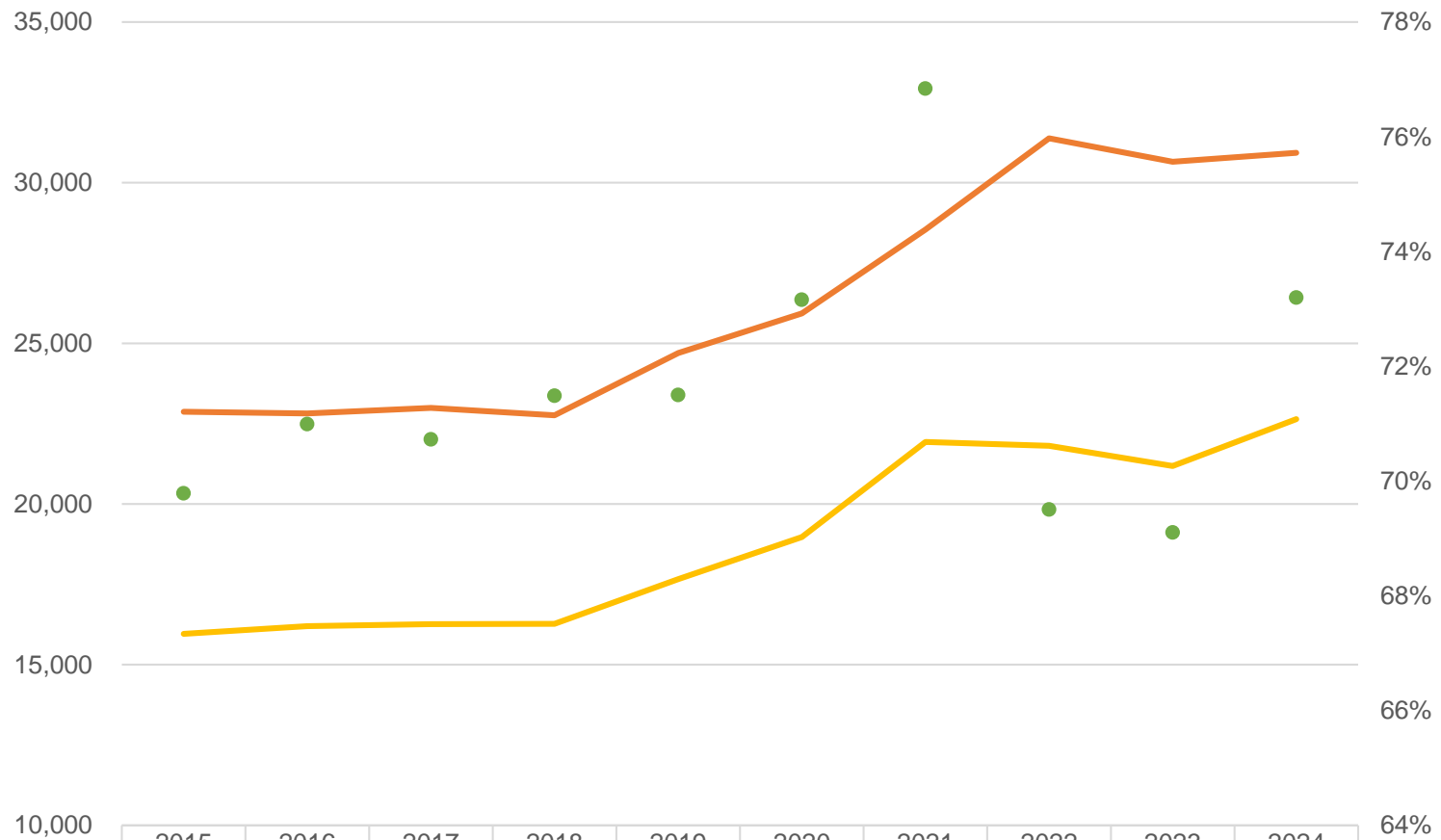
### UCAS UK applicant numbers by 30 June deadline: 19+-year-olds by UCAS age bandings 2015-24



	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
19	102,450	102,740	96,200	91,030	87,860	82,980	82,110	83,180	81,780	79,930
20	37,720	36,750	35,620	33,760	32,170	32,040	31,490	29,450	28,850	28,020
21-24	60,470	58,340	52,860	50,460	48,420	49,360	52,500	46,450	41,540	40,620
25-29	30,490	30,380	25,930	24,150	23,440	24,500	27,560	22,050	18,420	16,730
30-34	16,870	16,840	14,300	13,550	13,250	14,470	16,270	13,870	11,870	10,070
35 and over	27,950	29,360	24,810	23,860	23,720	26,890	28,760	25,330	25,420	22,280



# TUNDRA Quintile 5: applicant numbers (30 June deadline), acceptances and acceptance rates 2015-24



Most disadvantaged

Applicants

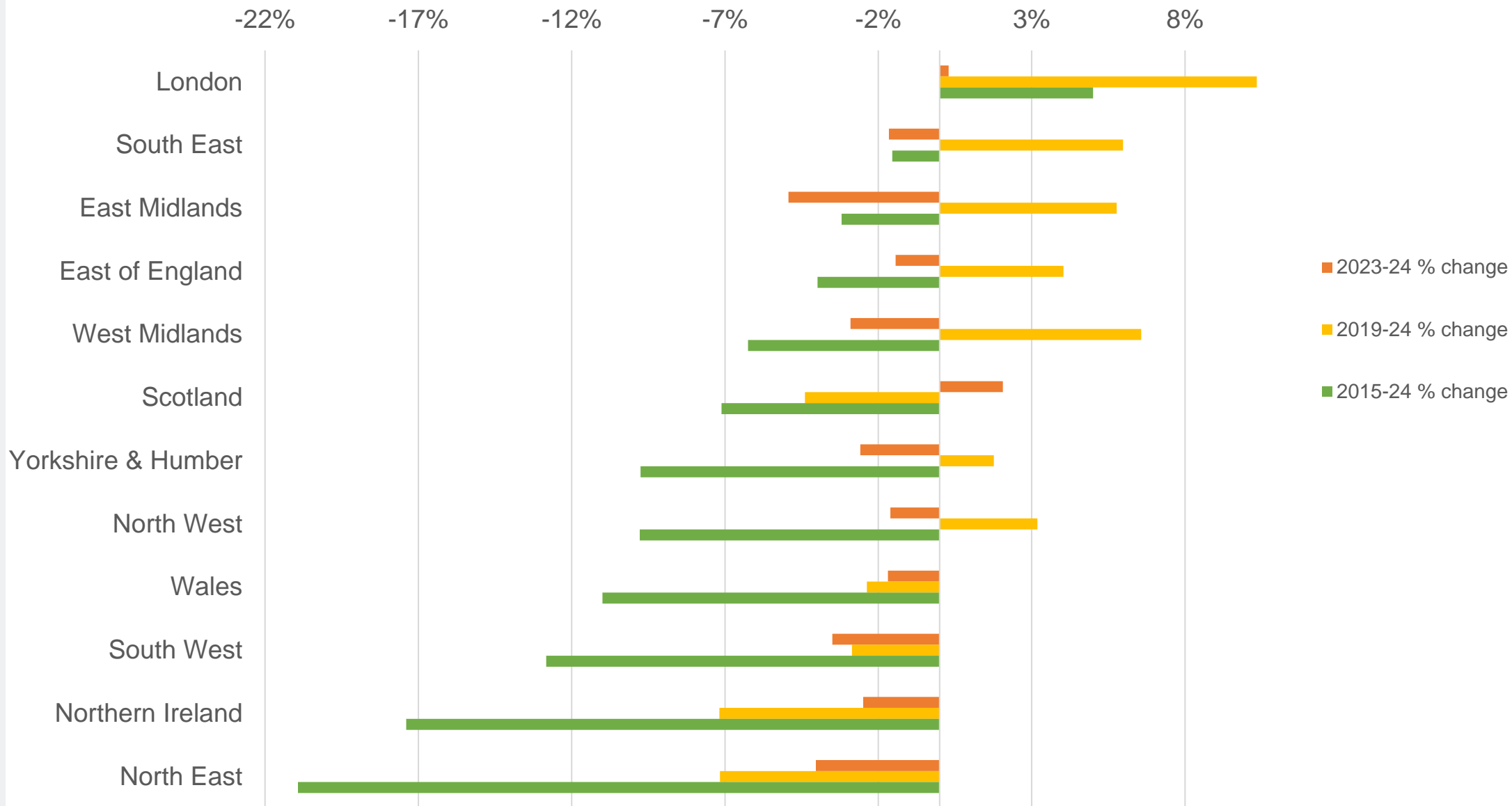
- + 280 (0.9%) on 2023
- + 27% on 2015

Acceptances

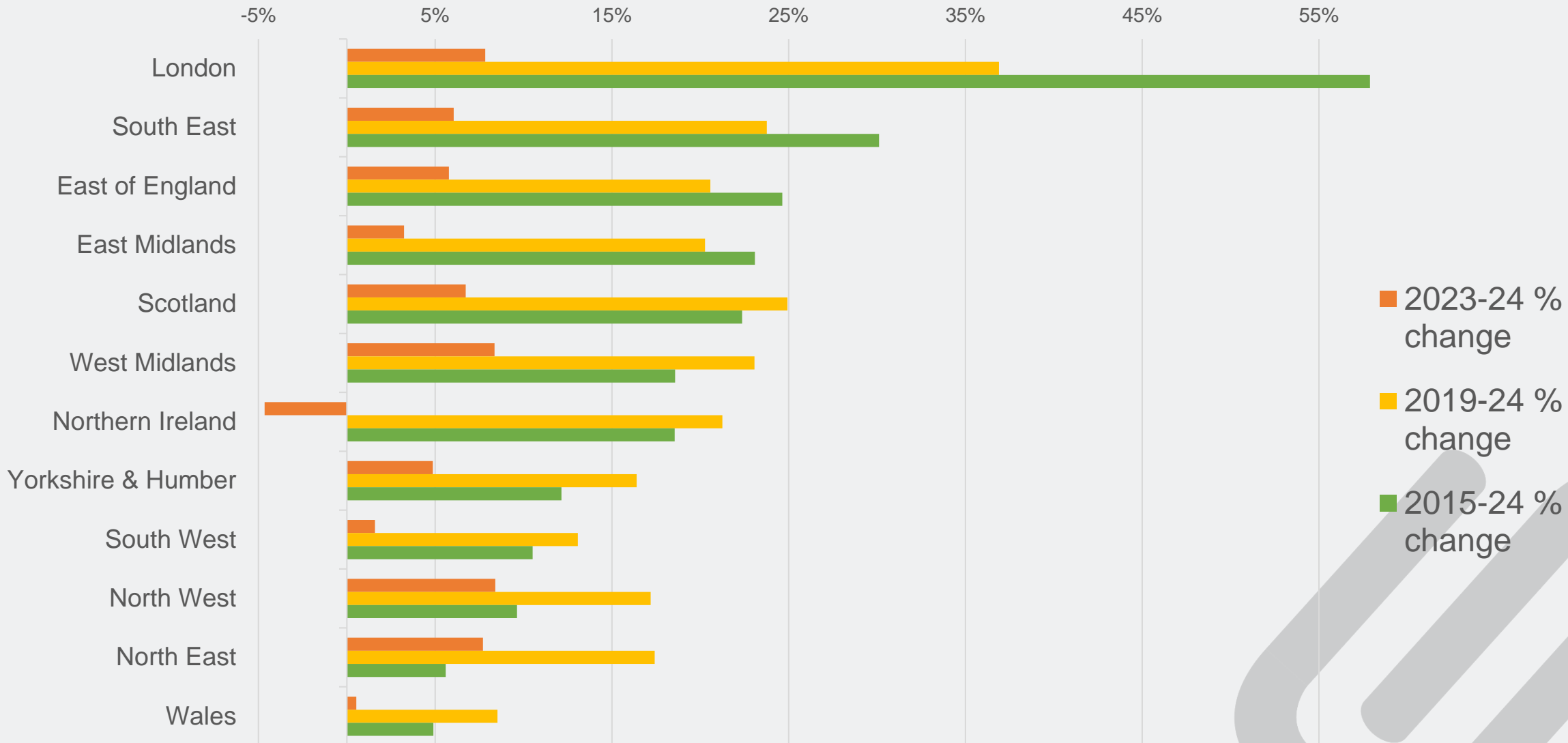
- +6.9% on 2023
- +30% in 2015

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Applicants	22,870	22,820	22,990	22,760	24,700	25,930	28,540	31,380	30,650	30,930
Acceptances	15,960	16,200	16,260	16,270	17,660	18,970	21,930	21,810	21,180	22,640
Acceptance/applicant rate	69.8%	71.0%	70.7%	71.5%	71.5%	73.2%	76.8%	69.5%	69.1%	73.2%

# Applicants (all ages) by UK regional domicile: percentage change over time



# 18-year-old accepted applicants by UK region: percentage change over time



# Challenging Context

## FINANCIAL TIMES

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### England's universities face 'closure' risk after student numbers dive

Report from Office for Students warns 'significant changes' needed to 'funding model'



The UK's Office for Students warned last week that universities could face a "closure" risk if they do not "significantly" change their funding model by the end of the year.

### Rapid Review of the Graduate Route

May 2024

MAC

### A Minimum Income Standard for Students

May 2024

Katherine Wilson MP Policy Centre for Research in Social Policy, Loughborough University

John Farnham Higher Education Policy Institute

### LABOUR WILL BUILD 1.5 MILLION NEW HOMES

### UK Parliament

#### Renters (Reform) Bill debate in the Lords

10 May 2024

### UK interest rate cut is 'possible' this summer, says Bank of England deputy

Ben Broadbent says direct impact of Covid and Ukraine war on inflation has faded and BoE is waiting for longer-term effects to decline

[Business live - latest updates](#)



# Conclusions on UK students

Turbulent times

Buyers market this year, but longer term concerns

Good news for applicants, especially from disadvantaged backgrounds

# Conclusions on UK students

Cost of living, high study costs and consumer perceptions

Regional disparities in application are deepening

2024 is likely to be significantly boosted by clearing, but too early to say