

# The second admissions cycle for HE reforms: What are we learning about demand?

**HEPI Spring Conference**

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# The reforms and applicant demand

- Higher fees and the decision to apply
- The reforms and the decision to enter

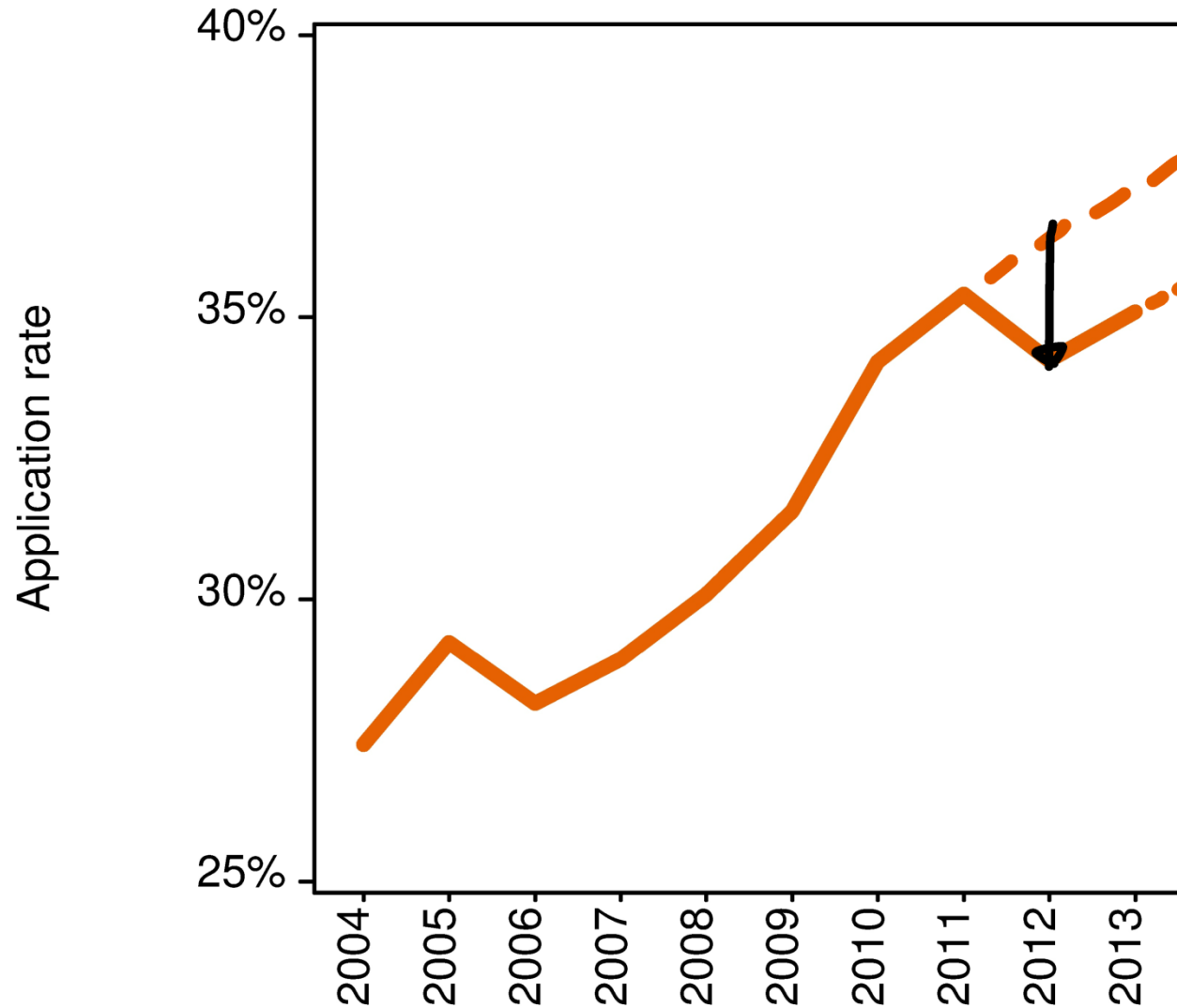
# The reforms and applicant demand

- **Higher fees and the decision to apply**
- The reforms and the decision to enter

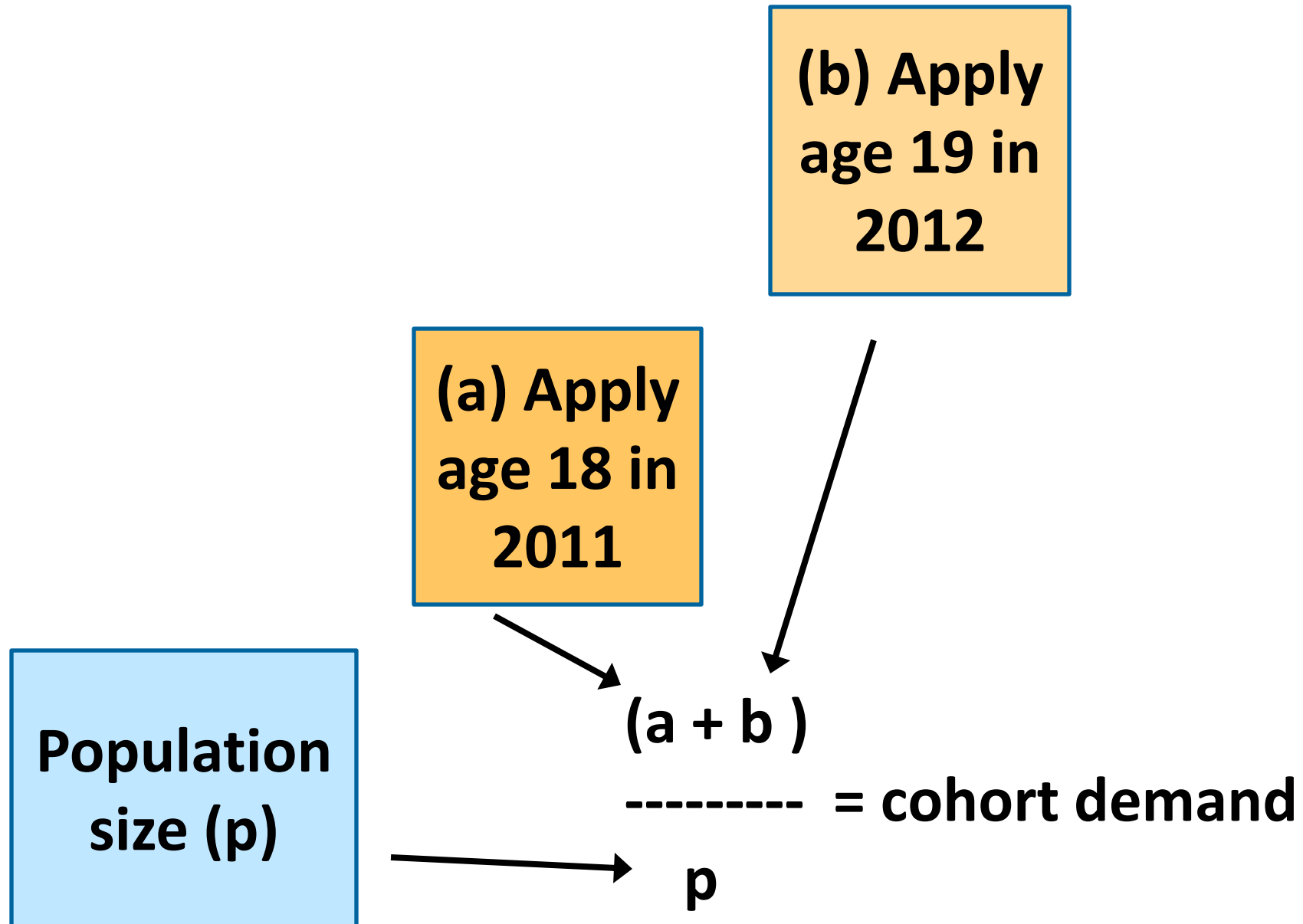
# English 18 year old application rate



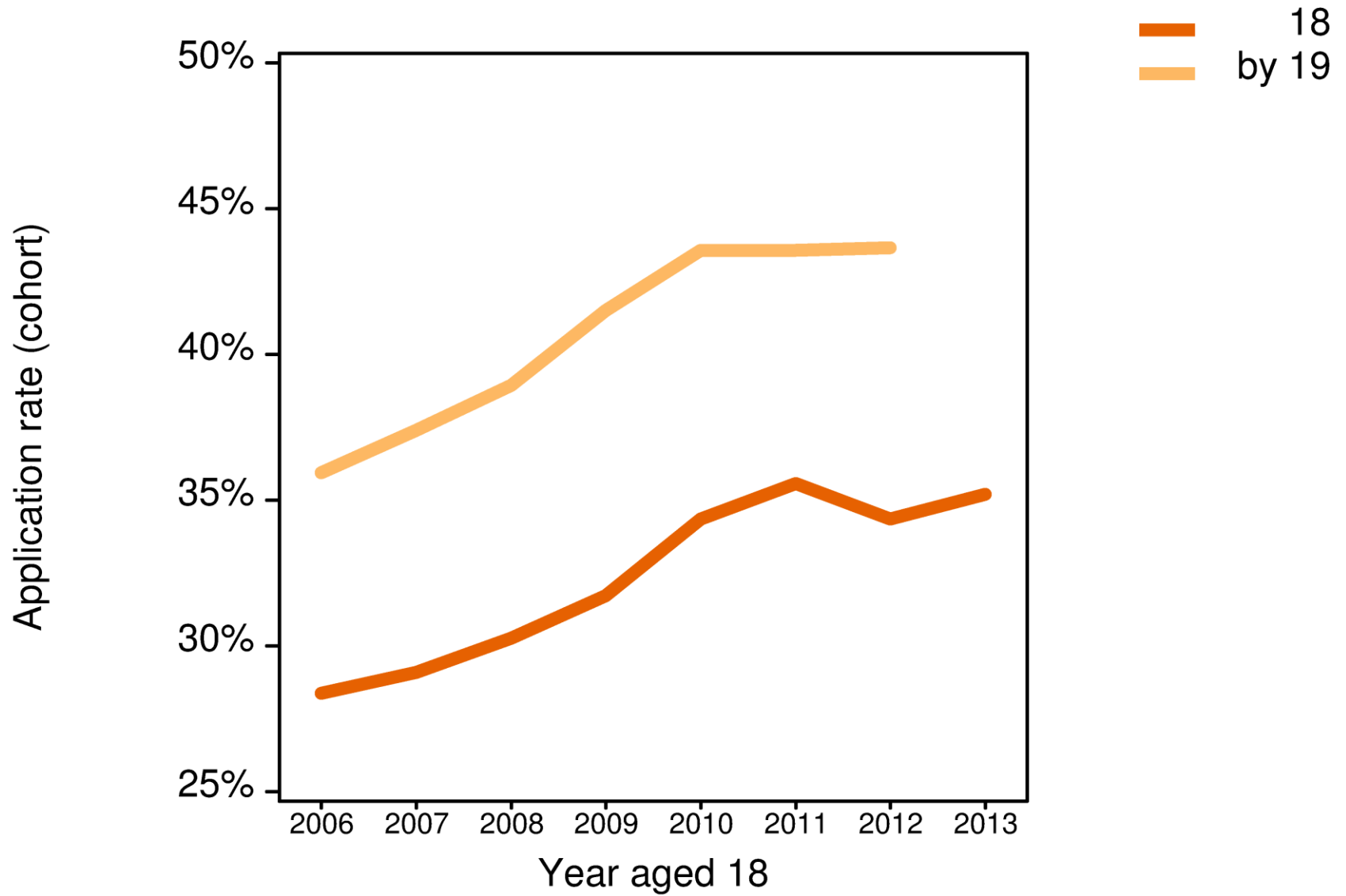
# Model of impact of reforms on demand



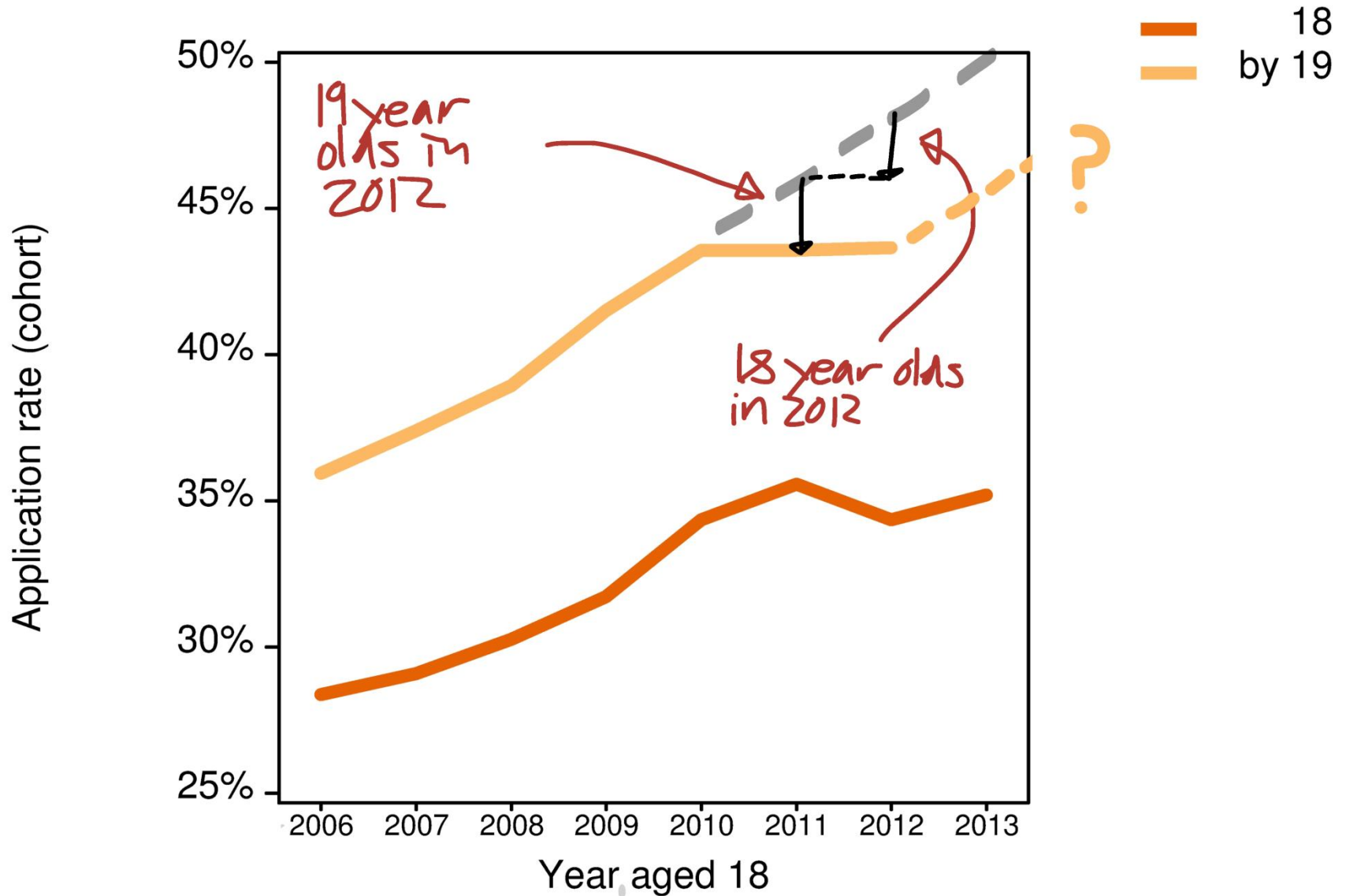
# Application by age 19 – a cohort rate



# Cohort demand for higher education



# Model of 2012 impact on cohort demand

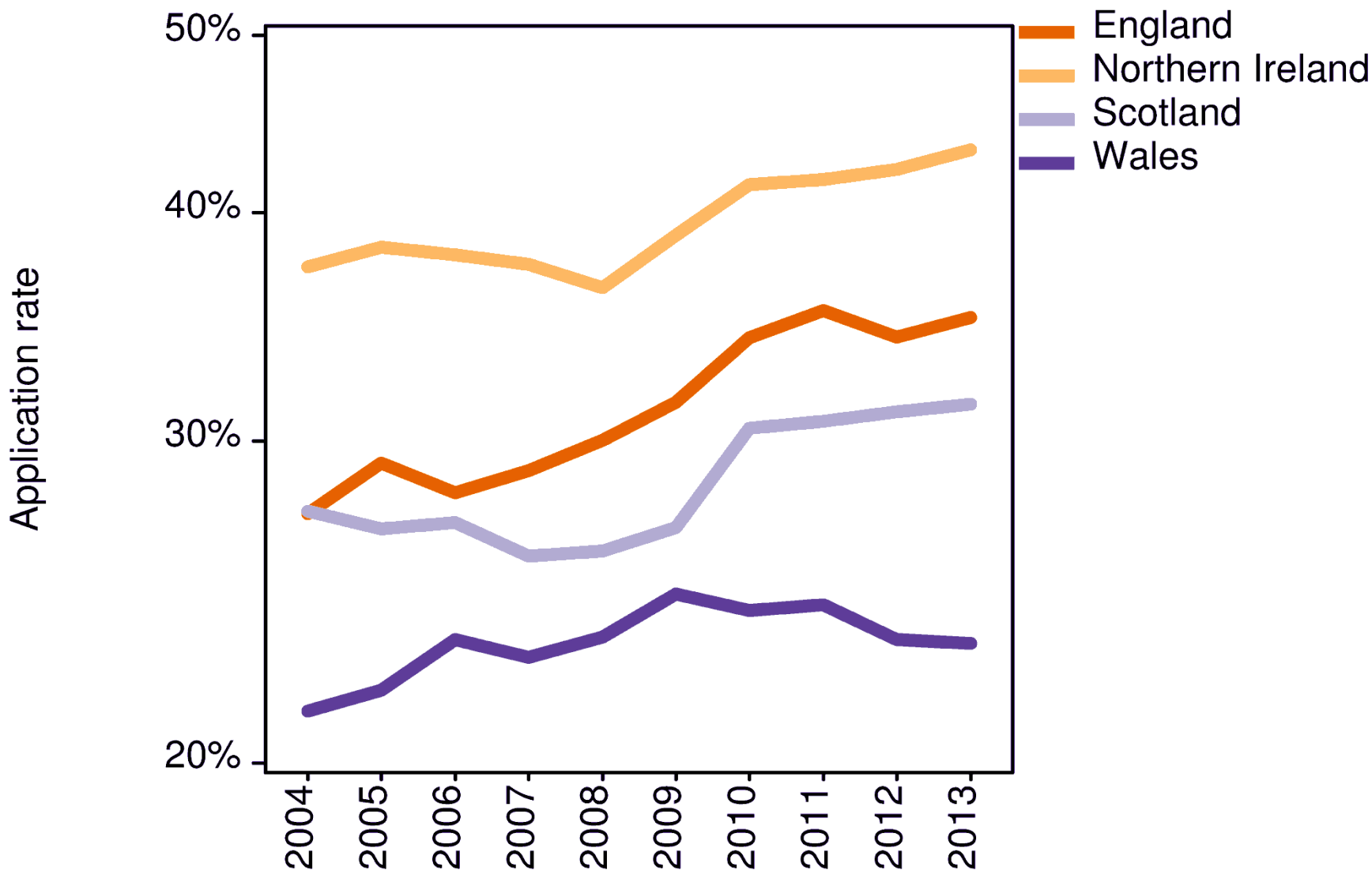




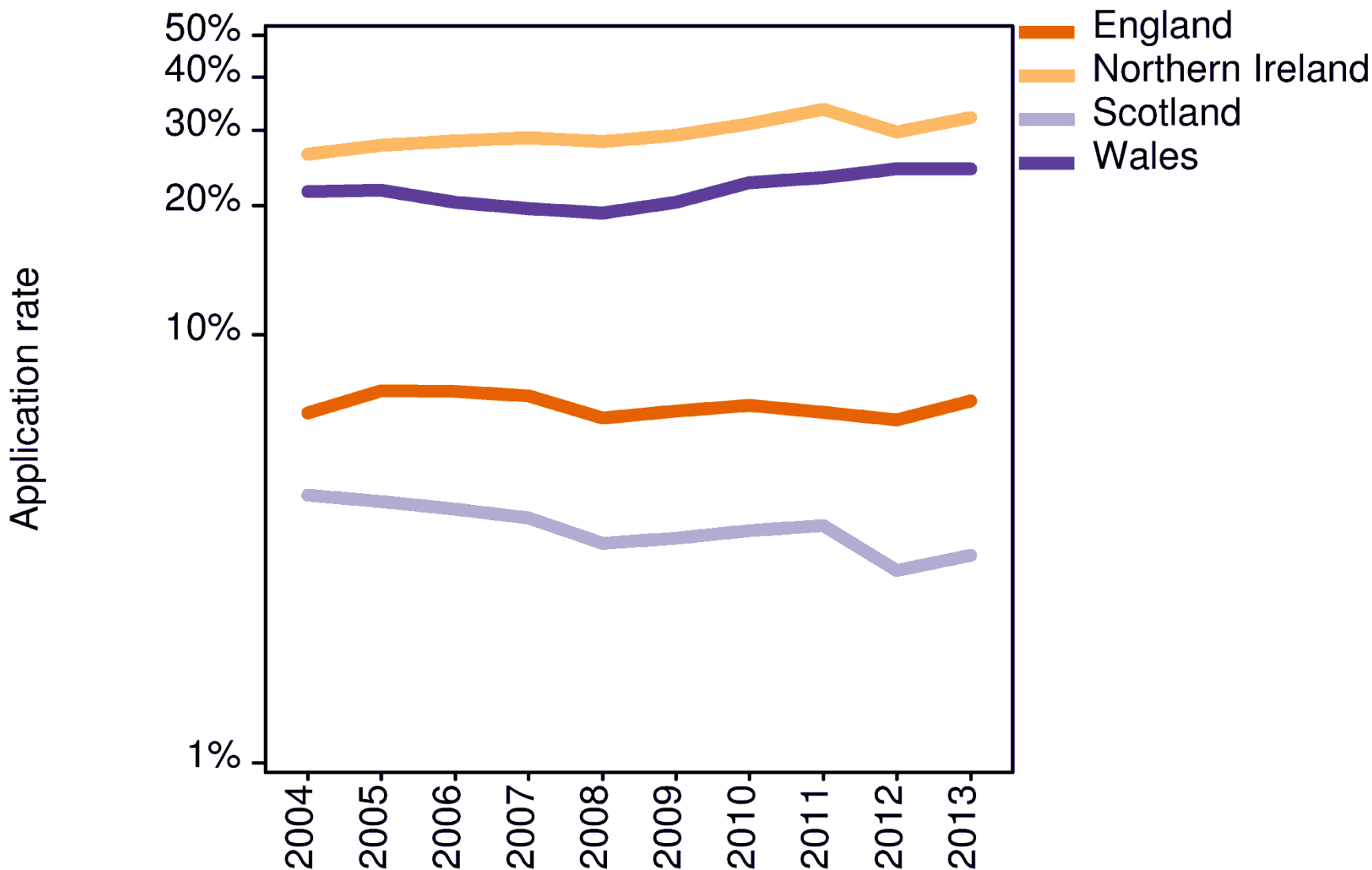
## Fee changes between 11-12 and 12-13

<b>From</b>	<b>To own country</b>	<b>To elsewhere</b>
England	+ c. £5k	+ c. £5k
Northern Ireland	No change	+ c. £5k
Scotland	No change	+ c. £5k
Wales	No change	No change

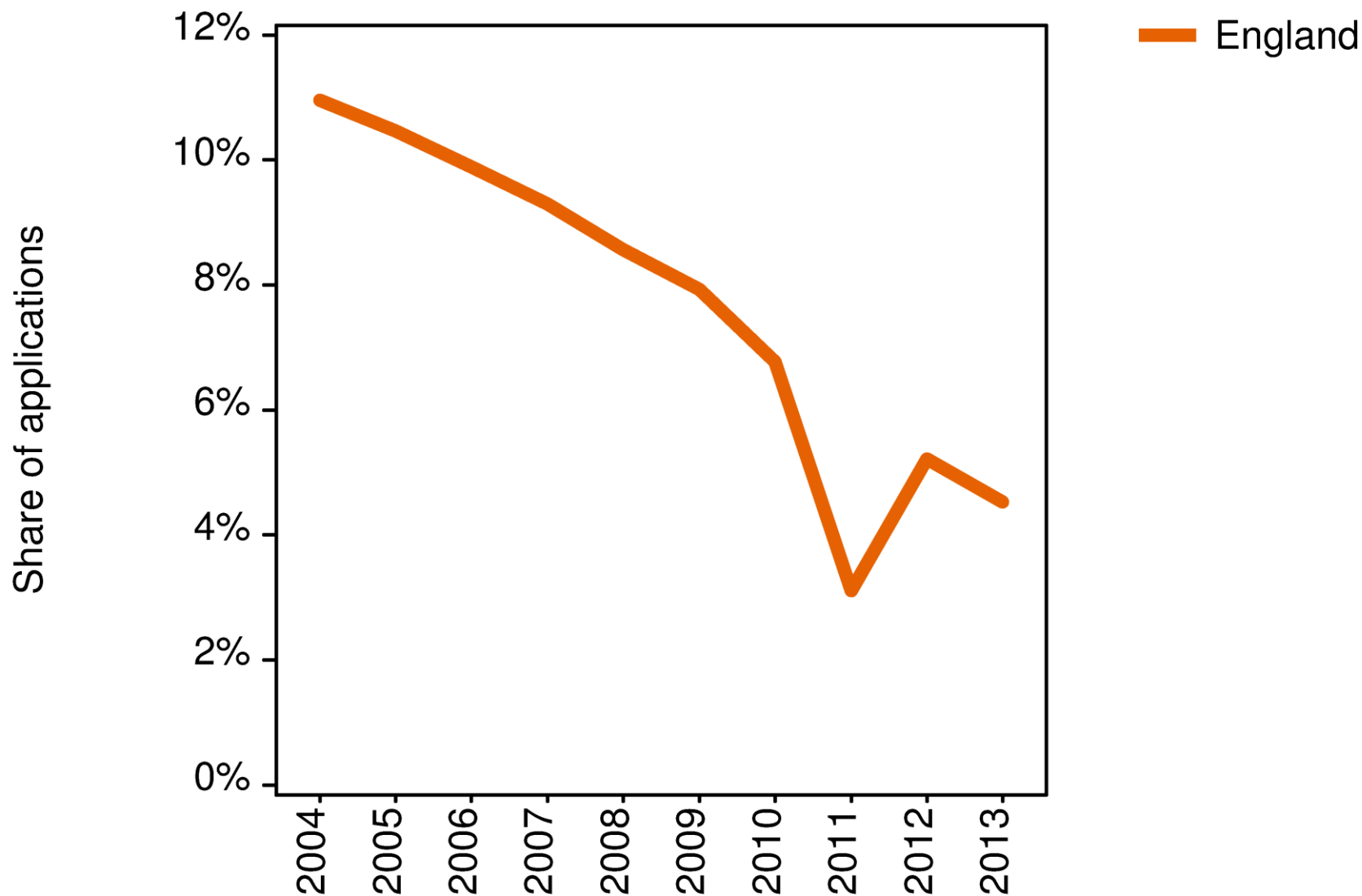
# Application rates to study in own country



# Application rates outside of own country

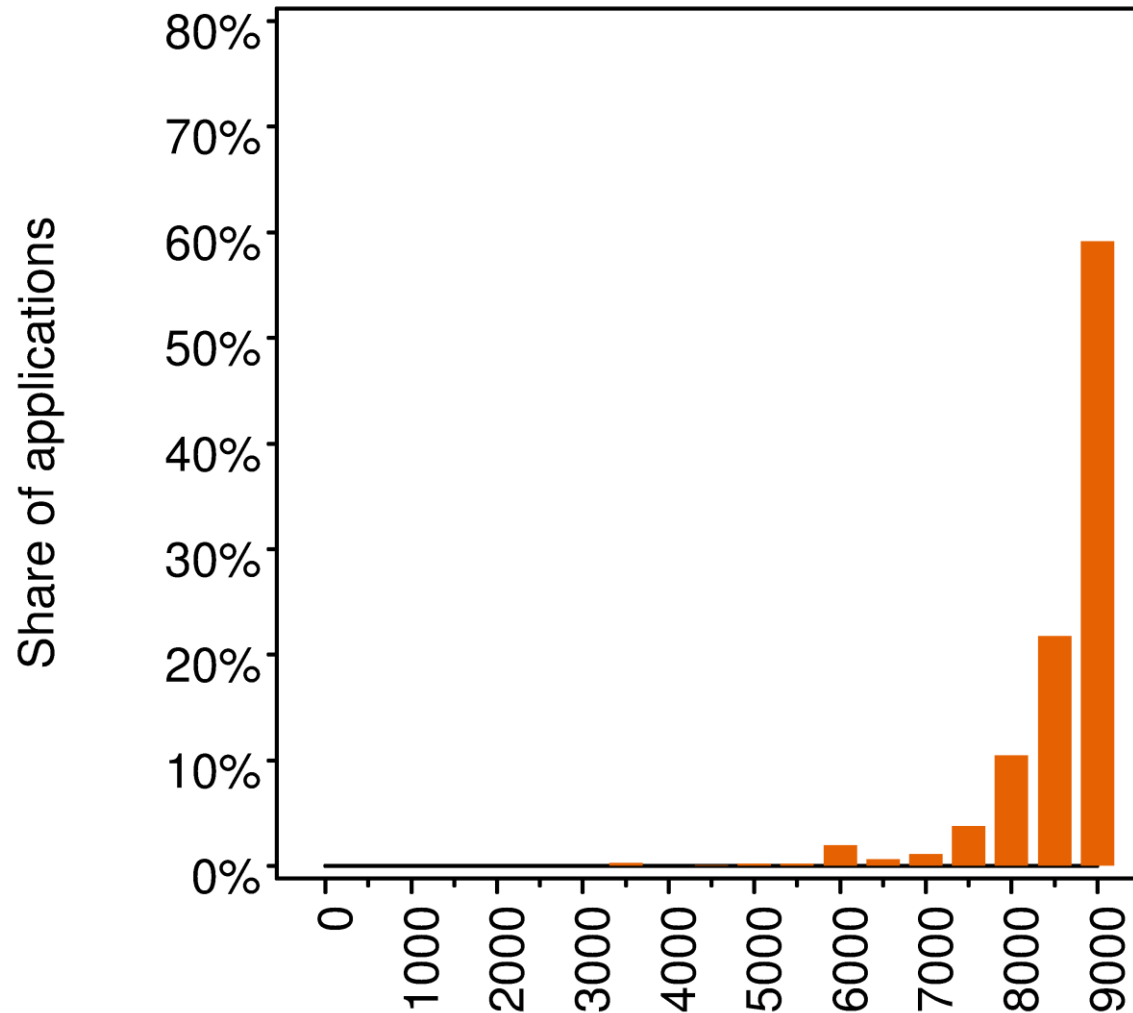


# Demand response: deferred applications



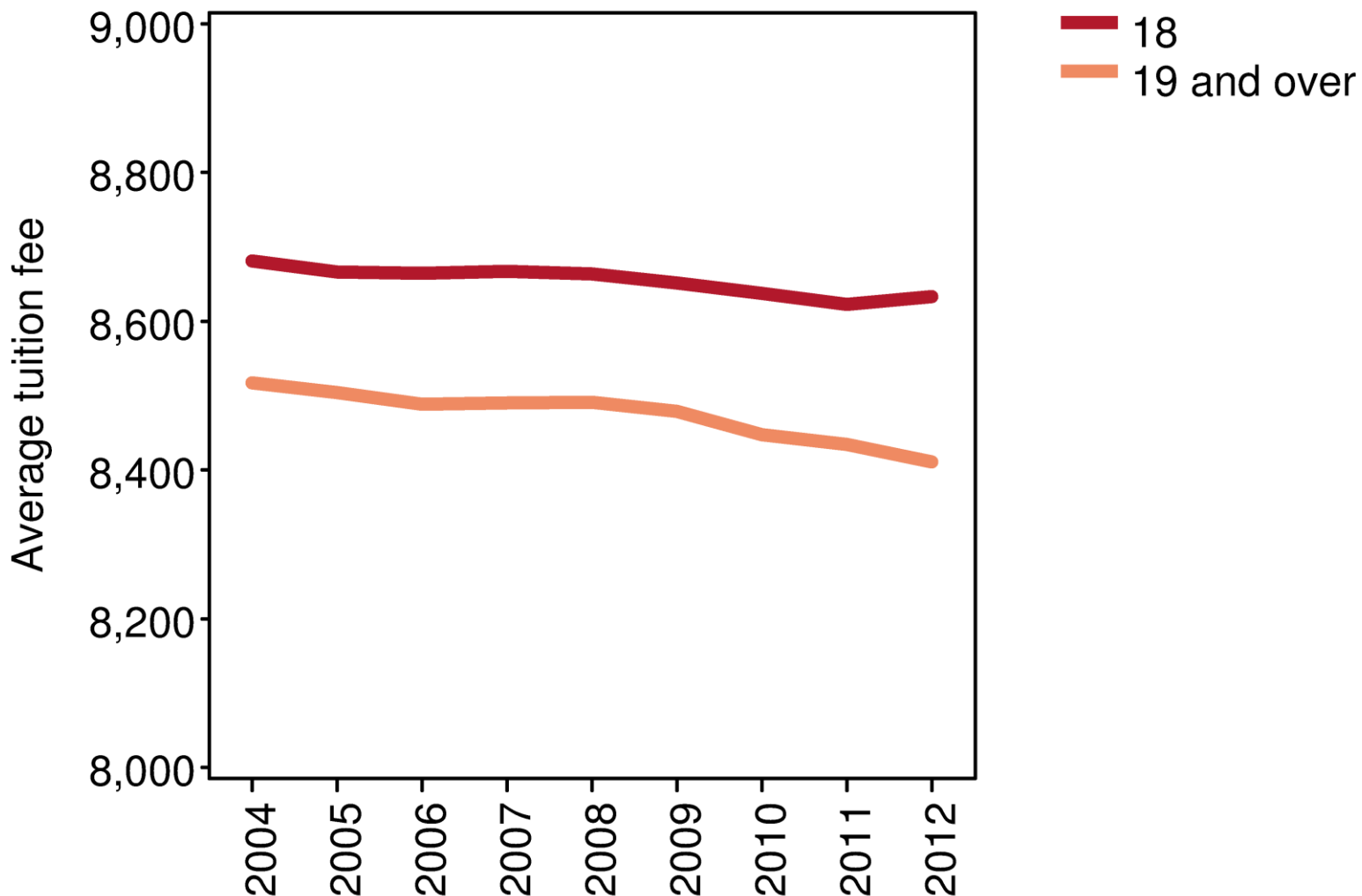
# The 2012 English fee market: applications

Distribution of 2012 English applications by tuition fee of course

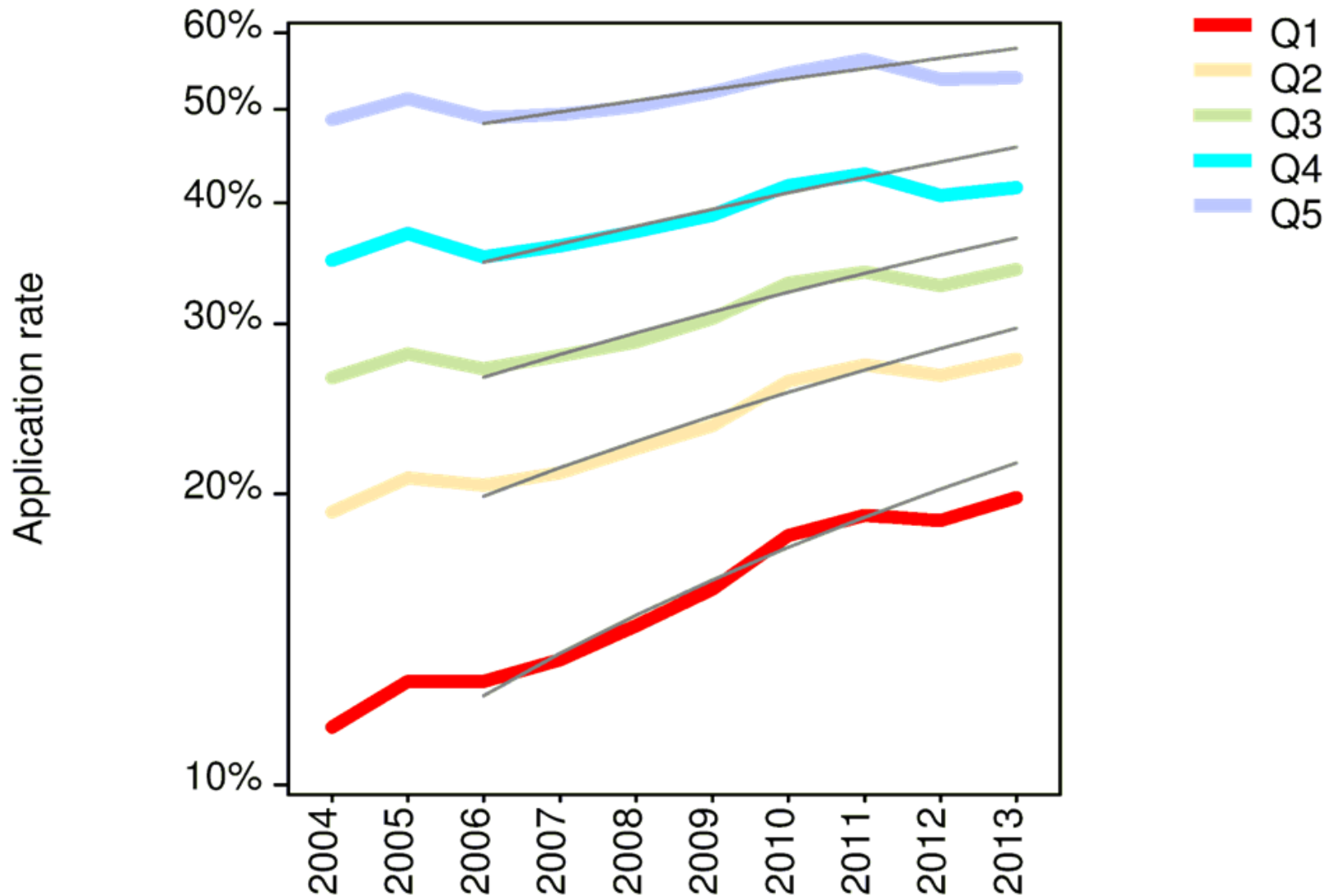


# No move away from high fee courses

Average 2012 tuition fee of courses applied to by English applicants to English institutions

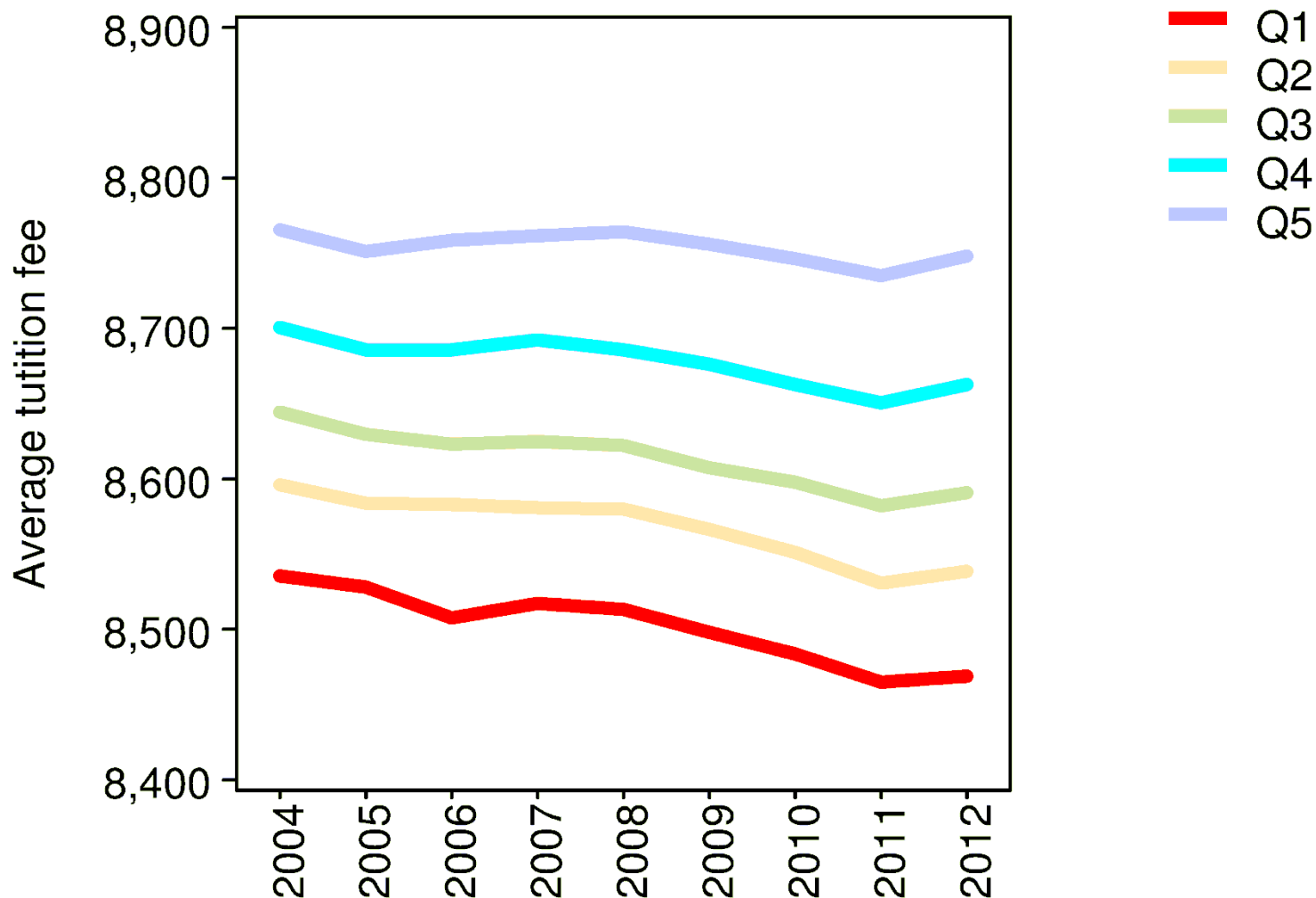


# Similar demand response by background



# Similar fee market response too

Average 2012 tuition fee of courses applied to by 18 year old English applicants to English institutions for areas grouped by young HE participation rates (POLAR2, Quintile 5 (Q5)= highest participation)





## Impact on demand of HE reforms?

<b>Demand</b>	<b>Consequence</b>	<b>Change</b>	<b>Impact</b>
Apply to HE	High – no HE	+ c. £5k	-5%
Apply to other country	Medium – apply home	+ c. £5k	c. -15%
Apply for deferred entry	Low – apply immediate	+ c. £5k	-50%
Apply low fee course	High – different type of institution	+ c. £1k	c. 0%

# The reforms and applicant demand

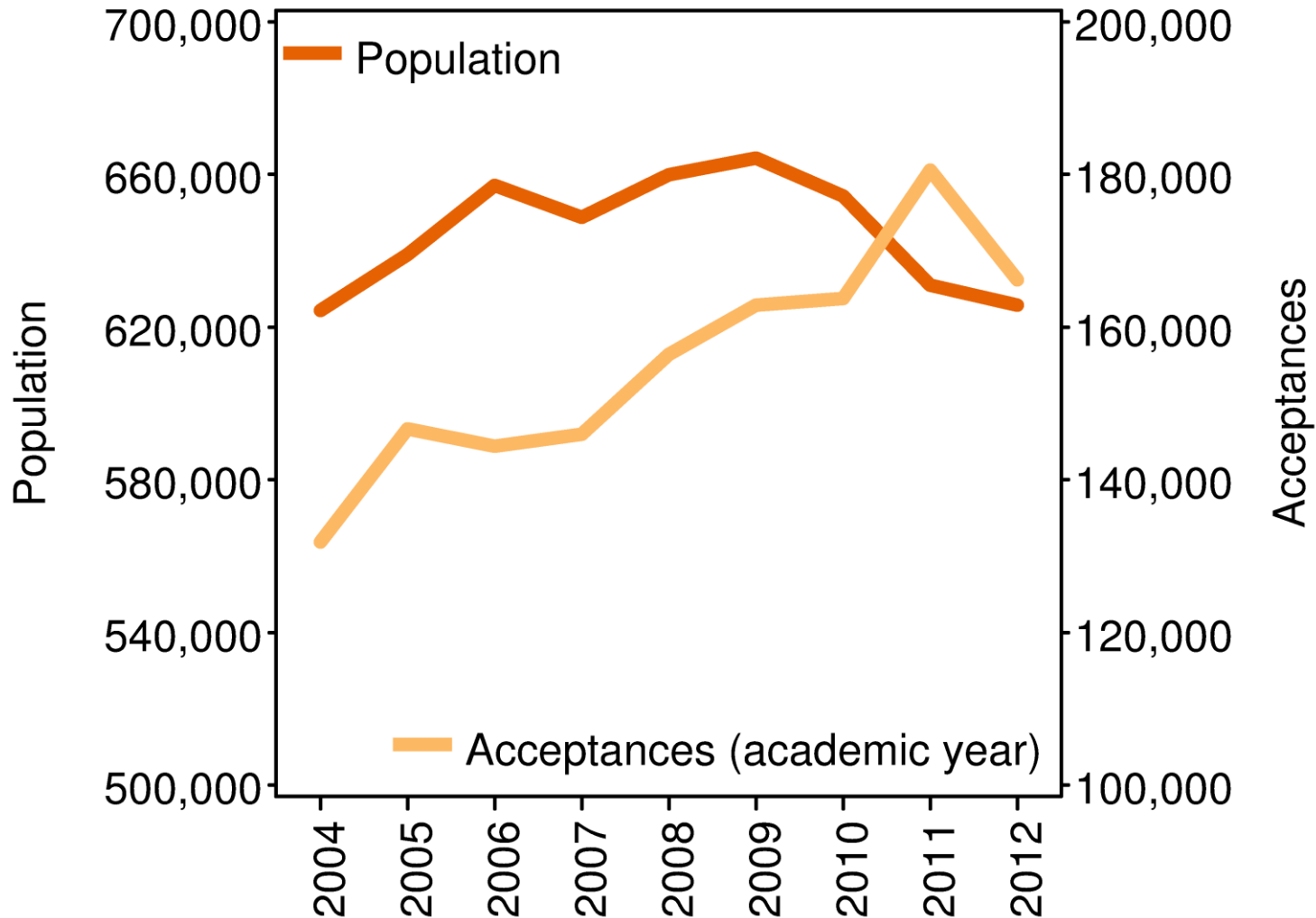
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# Demand and the acceptance rate

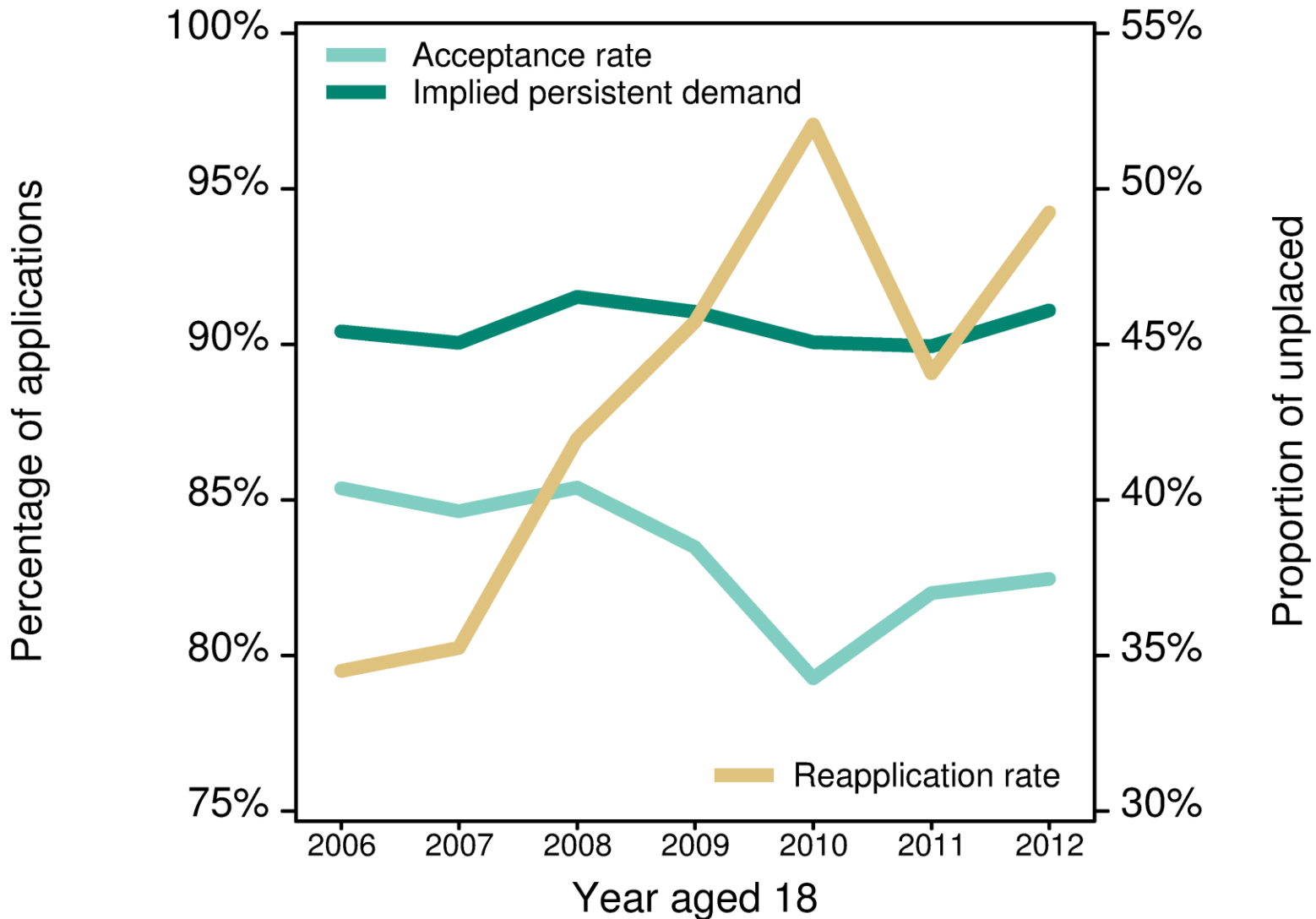
- **Acceptance rate** = proportion of applicants who are placed in higher education
- Reflects demand from both applicants and institutions

# Demand, deferments, demographics, grades

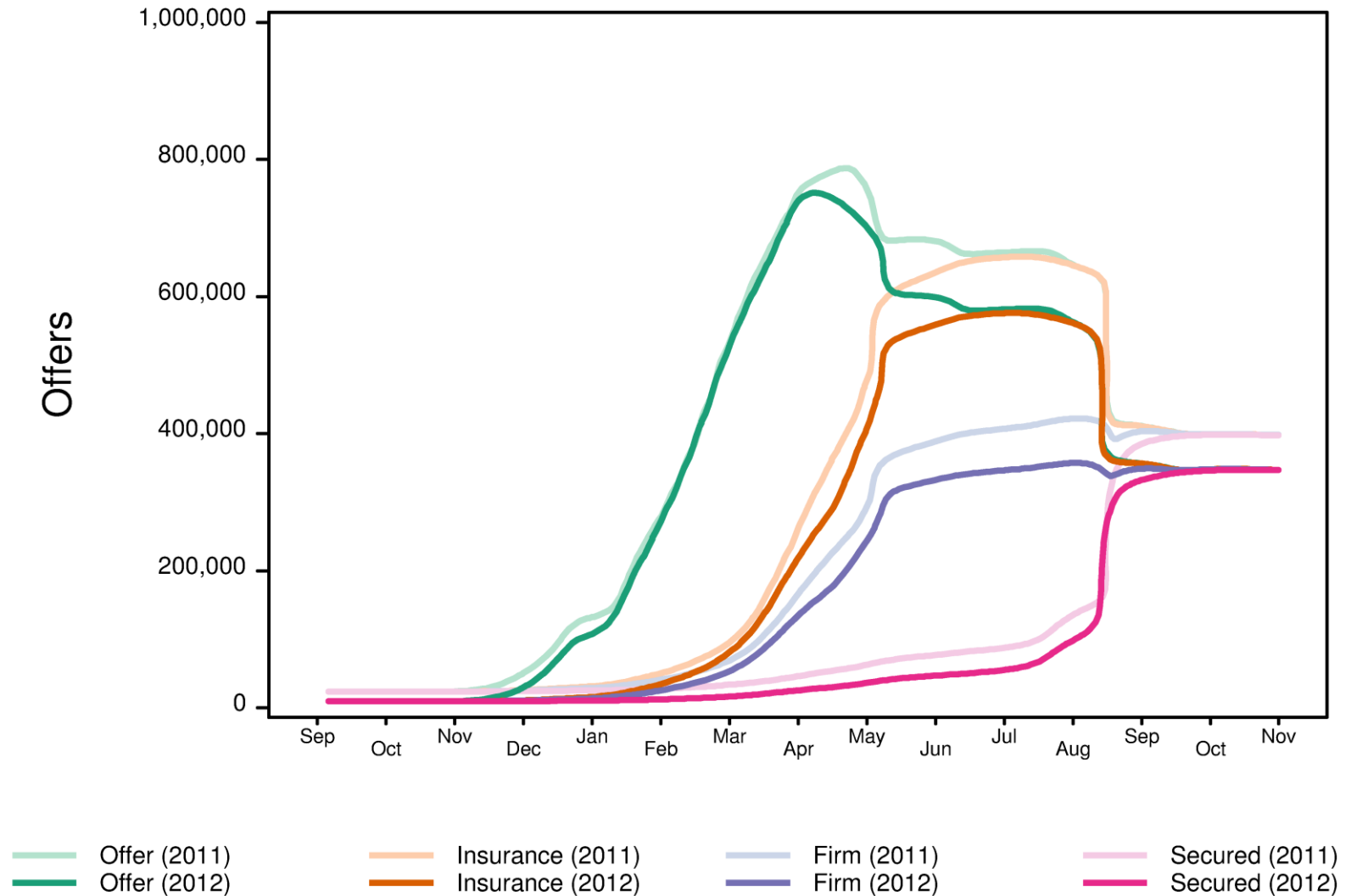
English 18 year old population and acceptances



# 'Persistent' 18 year old applicant demand



# 2012: fewer, more concentrated offers



# The reforms and applicant demand

- **Higher fees and the decision to apply**
  - relatively small fall in 'application demand'
  - underlying growth trend seems intact
- **The reforms and the decision to enter**
  - 'persistent demand' was steady in 2012
  - but how institutions make offers matters

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