HEPI

Report

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Demographic decline and predatory recruitment: The twin threats to English higher education into the 2040s

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About the author

Bahram Bekhradnia established the Higher Education Policy Institute in 2002, and was its Director until December 2013 following which he became HEPI's first President. Before establishing HEPI he had been the Director of Policy of the Higher Education Funding Council for England (HEFCE) since its formation in 1992, and prior to that was a senior civil servant in the Department of Education and Science.

Introduction

The English higher education sector is experiencing a period of structural tension shaped by the interaction of demographic change, sustained financial pressure and increasingly competitive recruitment behaviour.

This report examines recent changes in university recruitment patterns. It considers in particular the extent to which some – especially high-tariff – institutions have reduced their tariff requirements – and analyses the consequences. [1] It goes on to analyse the implications of alternative futures.

Demographic context

Young (18 to 20-year-old) entrants dominate university intakes.[2] This group represents around 80 per cent of university entrants as has been the case since HEPI conducted its original reviews of student demand 20 years ago, notwithstanding criticism that in doing so we were ignoring the potential for increases in older and part-time students.

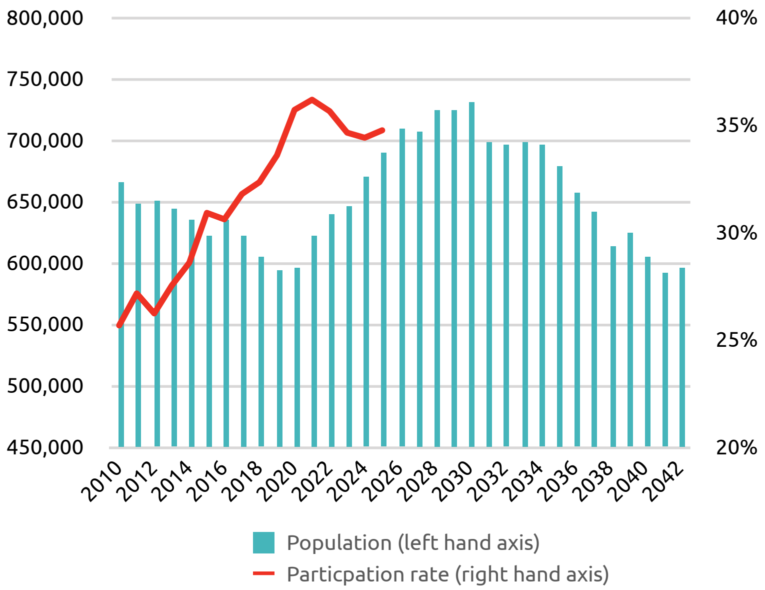
For at least the foreseeable future, young students will continue to be the determining group when considering future demand. This report is therefore concerned with changes in the young population and the impact that those will have on higher education demand.

Figure 1 shows the English 18-year-old population from 2010 to 2042 (advancing the analysis contained in HEPI's 2024 report by 2 years). The demographic trajectory shows three distinct phases:

1. Decline to around 2020;
2. Rapid growth to around 2030; and
3. Decline to around 2040, followed by possible stabilisation at this lower level.

Between approximately 2020 and 2030, the number of 18-year-olds will have increased by around 20 to 25 per cent, creating a substantial expansion in the potential student pool. Within this period there will be a modest increase between 2026 and 2030. However, this increase is reversed in the following decade.

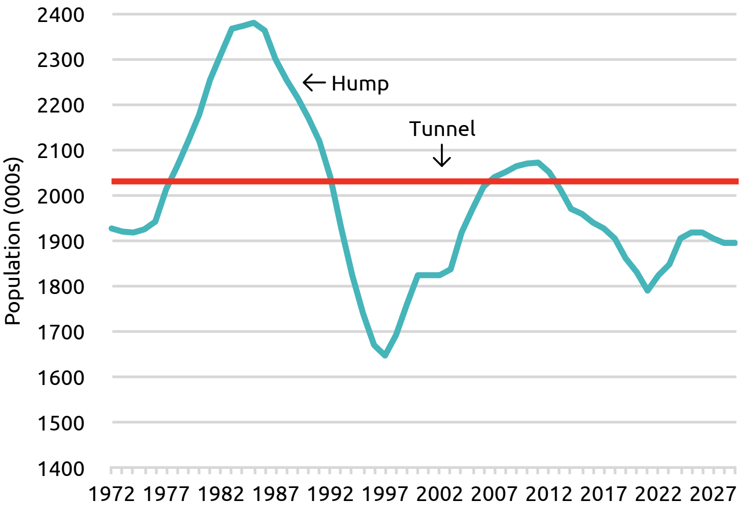
Figure 1: 18-year-old population and participation



Sources: Author's calculation based on Office for National Statistics (ONS) live births data for England (shifted forward 18 years); UCAS End of Cycle data (England domiciled 18-year-old acceptances to providers in England)

The population decline, following an increase, does not of course necessarily mean that student numbers will follow. In the 1970s, aware of an impending demographic increase followed by an even greater decline, the Government adopted a policy of 'tunnelling through the hump' – illustrated in Figure 2 – with the aim of curbing the numbers who could attend university during the demographic increase in order to avoid the likelihood of unused and wasted resources during the anticipated subsequent decline.

Figure 2: Tunnelling through the hump 1970s and 1980s



Source: Reconstructed from the 1978 Discussion Document Higher Education into the 1990s – Department of Education and Science 1998

However, in the event, the population decline was accompanied by a surge in participation, meaning that numbers kept rising, taking the Government by surprise. It is possible that something similar will happen again. However, the 1970s participation increase was from a very low base – around 12 per cent of the young population – and was characterised as the UK simply catching up with the rest of the developed world where participation was already much higher. And it occurred at a time when school attainment improved rapidly following the raising of the school leaving age and, later, the introduction of GCSEs. There is no such reason to anticipate an equivalent surge in participation today.

The secondary axis of Figure 1 shows acceptances by UK-domiciled 18-year-olds to providers in England as a proportion of the 18-year-old population. It can be seen that while the population of 18-year-olds was falling until 2020, the proportion of that population entering higher education – the participation rate – rose rapidly, leading to an increase in student numbers, but has stalled since. There is no indication that young participation is rising or will do so in the near future. If it does not do so – if a higher proportion of the declining population does not opt to enter higher education – then the decline in the population of 18-year-olds will result in a reduction in the number of students. This is the most likely outcome – not a repeat of the participation increase of the 1980s and 1990s.

HEPI'S 2024 report found that a narrowing of the longstanding gap between male and female participation was the best hope of increased participation, but that there were no signs of that occurring – and there remain none. Unless participation begins to rise again, projections of future student numbers depend primarily on demographic trends rather than shifts in demand. That implies a reduction in total numbers across the sector of around 16 per cent between 2026 and 2042, and around 18.5 per cent between 2030 and 2042.

This demographic pattern poses a structural challenge for all institutions, regardless of their position in the higher education sector. Recruitment decisions taken in a favourable demographic environment will continue to have consequences in a less favourable one.

Evidence from HEPI's engagement with multiple governing bodies suggests this reality is not widely recognised. Strategic planning in many institutions continues to assume maintenance or even growth in student numbers, with limited consideration of the implications of demographic decline.

Instead, institutions typically plan to rely on a combination of measures to maintain or increase recruitment. These include imaginative efforts to improve domestic recruitment performance, expansion in international student recruitment and the further development of transnational education.

While each of these strategies may be rational at the level of an individual institution, their effectiveness at the sector level is likely to be limited. If all institutions seek to expand within a constrained domestic pool, their efforts will tend to offset one another. At the same time, international recruitment has become more uncertain and the potential of transnational education remains difficult to assess at scale.

Financial context

Since the tuition fee cap was raised to £9,000 in 2012, it has increased very little in nominal terms and now stands at £9,535. At the same time, its real value has declined significantly. In real terms it is now worth approximately 25 per cent (Consumer Price Index – CPI) to 30 per cent (Retail Prices Index –RPI) less than at its introduction. A fee of £9,000 in 2012 would now need to be approximately £12,500 to £13,000 to have maintained its real value. The current fee therefore represents a substantial decline in funding per student, placing persistent pressure on institutional finances.

The decline in the unit of resource has had important behavioural consequences. In particular, it has created strong incentives for institutions to maintain income by increasing student numbers. In response, many higher-tariff providers in particular have expanded recruitment, adjusting entry requirements at the margin in order to recruit more students and maintain income.

For higher-tariff providers, expansion in student numbers – particularly at the margin of entry requirements – represents one of the most direct mechanisms available to offset this financial pressure. Viewed in isolation of the impact on the sector as a whole, such decisions are entirely understandable. Institutions need to sustain their income in order to maintain the level of activity to which they are committed. However, this has implications for mid- and lower-tariff providers by reducing the pool from which they recruit.

Higher-tariff provider growth

UCAS data show that between 2016 and 2025, the number of UK-domiciled acceptances to higher-tariff providers increased from approximately 115,000 to 146,000, an increase of around 30,000 (around 27 per cent). Over the same period, total acceptances across the sector as a whole increased from approximately 465,000 to just over 500,000 (around 7 per cent), indicating that growth at higher-tariff providers reflects both overall system expansion and, to a much greater extent, a substantial redistribution of students within the sector.

This can be illustrated by comparing actual higher-tariff recruitment in 2025 with a counterfactual in which the higher-tariff share of acceptances remained at its 2016 level. Had the 2016 share been maintained, higher-tariff providers would have recruited 124,702 students in 2025 rather than 146,130.

This distinction between system growth and redistribution is set out in Table 1. Of the increase of 30,745 acceptances at higher-tariff providers between 2016 and 2025, only around 9,300 (around 30 per cent) can be attributed to overall system growth, with the remaining 21,400 reflecting redistribution from other parts of the sector.

Table 1: Breakdown of higher-tariff growth 2016 to 2025[3]

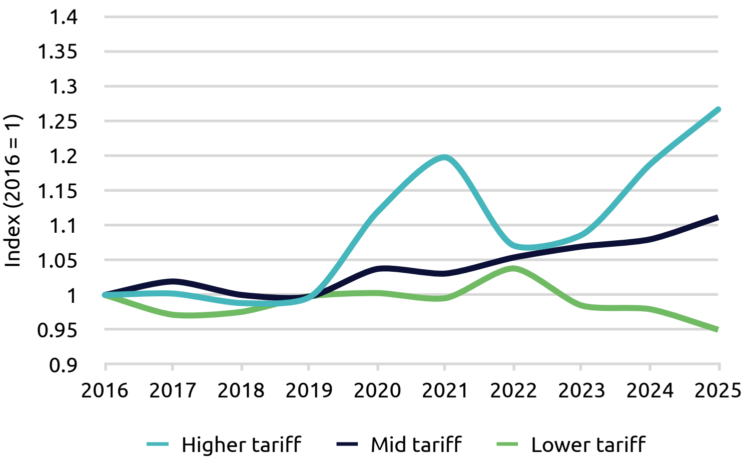
Component	Number of acceptances
Total growth	+30,745
System growth	+9,317
Encroachment	+21,428

This implies that around 70 per cent of the growth in higher-tariff recruitment over this period reflects redistribution rather than expansion of the system as a whole, the difference of 21,428 students representing what may be described as primary encroachment: students who, under the 2016 distribution of recruitment, would likely have attended other providers.

Figure 3 presents an index of acceptances (2016 = 1) for each tariff group. It shows a clear divergence in recruitment patterns, reflecting changes in recruitment behaviour. The relative growth of higher-tariff acceptances during COVID (which fell back immediately after) is remarkable and difficult to explain, especially in view of the fact, illustrated in Figure 4, that during the same period higher-tariff institutions reduced their intakes of lower-tariff students. Putting that to one side, acceptances to higher-tariff providers increased by around 27 per cent between 2016 and 2025, while mid-tariff providers recorded more modest growth of around 11 per cent and lower-tariff providers experienced a decline of around 5 per cent. Over the same period, the number of 18-year-olds increased by around 8 per cent.

These trends indicate that the expansion of higher-tariff providers reflects not only overall system growth but also a substantial redistribution of students within the sector. Growth at the top of the tariff distribution has outpaced demographic change, while recruitment in other parts of the sector has grown more slowly or contracted. This divergence is consistent with an increasing concentration of recruitment within higher-tariff institutions.

Figure 3: Relative growth in acceptances by tariff group ((all entrants) 2016 = 1)



Source: UCAS End of Cycle data, 'Tariff group of providers – acceptances' (UK-domiciled applicants), 2016 to 2025; author's calculations

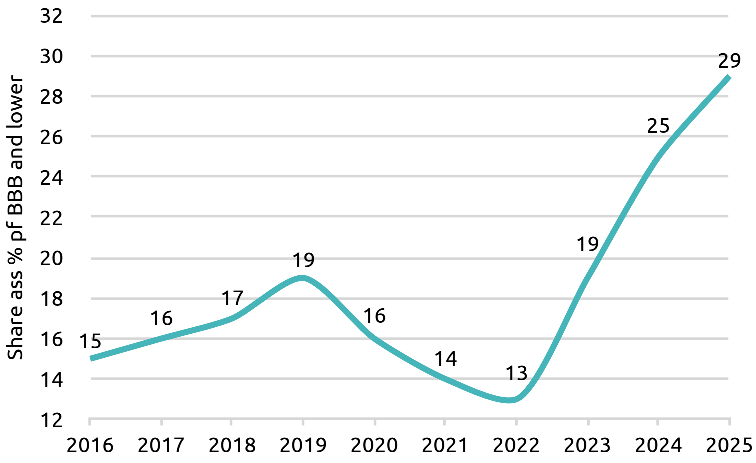
Cascade effect

Higher-tariff recruitment of BBB and lower applicants

Looking specifically at entrants with BBB grades or lower, UCAS data show that, among applicants holding at least three A Levels, the number accepted to higher-tariff providers increased from 13,485 in 2016 to 25,270 in 2025 – an increase of 11,785 students. Given an average first-degree programme of 3.3 years, this implies an increase in the steady-state stock of such students at the institutions concerned of around 40,000.

As with overall recruitment growth, part of this increase reflects expansion in the student population. However, a substantial part reflects redistribution – higher-tariff institutions recruiting students they would not previously have recruited and who would otherwise very likely have attended other providers.

Figure 4: Proportion of entrants to higher-tariff universities with BBB grades and lower as percentage of their intake



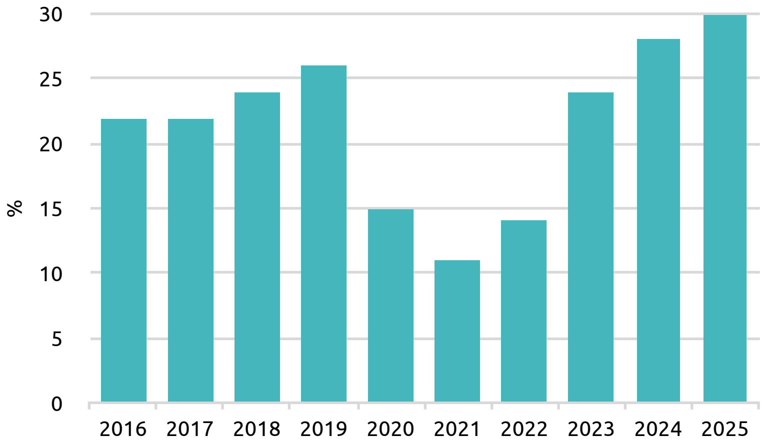
Source: UCAS End of Cycle data, 'Provider tariff group by detailed A Level attainment' (UK-domiciled applicants holding at least three A Levels), 2016 to 2025; author's calculations

Figures 4 and 5 tell similar stories, but from slightly different perspectives. Both are concerned with the extent to which higher-tariff institutions have lowered their tariff requirements and now recruit extensively from among lower-achieving students.

Figure 4 shows the proportion of the intake of higher-tariff institutions accounted for by students with BBB or lower A Level grades (defined as half of those in the 113 to 128 tariff band and all those with tariff scores below this).

Figure 5 tells a similar story but from a different perspective and shows that 30 per cent of all lower attaining students are admitted to higher-tariff universities whereas previously the majority of these may have expected to attend mid- and lower-tariff institutions.

Figure 5: % of of all lower-achievers attending higher-tariff institutions



Source: UCAS End of Cycle data, 'Provider tariff group by detailed A Level attainment' (UK-domiciled applicants holding at least three A Levels), 2016 to 2025; author's calculations

The shifts have been considerable over the past 10 years. Figure 4 shows that in 2016, 15 per cent of admissions to higher-tariff institutions had lower grades, rising to 29 per cent in 2025; and Figure 5 shows that whereas in 2016 just 22 per cent of all lower attaining students attended higher-tariff institutions, that figure increased to 30 per cent by 2025. Taken together, these trends reinforce the conclusion that a substantial proportion of the growth in higher-tariff institutions represents students who, under earlier recruitment patterns, would likely have attended other providers. Increased recruitment of these students has been a substantial driver of the expansion of numbers in higher-tariff institutions. In this sense, the recent expansion of higher-tariff institutions is at least partly redistributive rather than purely demographic. More generally these data show that while demographic change determines the size of the potential student pool, it does not determine how students are distributed across institutions. In a world where there are no constraints on recruitment that distribution is shaped by institutional behaviour.

Adjustment by mid-tariff providers

The expansion of higher-tariff providers has had implications for the rest of the sector.

As higher-tariff providers recruit further into the attainment distribution, mid-tariff providers face a reduction in the pool of students available at their traditional entry levels. In response, they too have adjusted their recruitment behaviour, typically by expanding intake at lower-tariff levels and reducing effective entry thresholds.

This process gives rise to a second stage of redistribution within the system. Application of the same counterfactual framework as above suggests that mid-tariff recruitment at lower attainment levels exceeds what would be expected under earlier patterns by approximately 5,000 to 8,000 students. This may be interpreted as secondary encroachment on lower-tariff providers (encroachment from the point of view of those universities losing students, but normal market behaviour on the part of those recruiting the students concerned).

Table 2 summarises this two-level redistribution process, showing both the initial displacement associated with higher-tariff expansion and the subsequent adjustment by mid-tariff institutions.

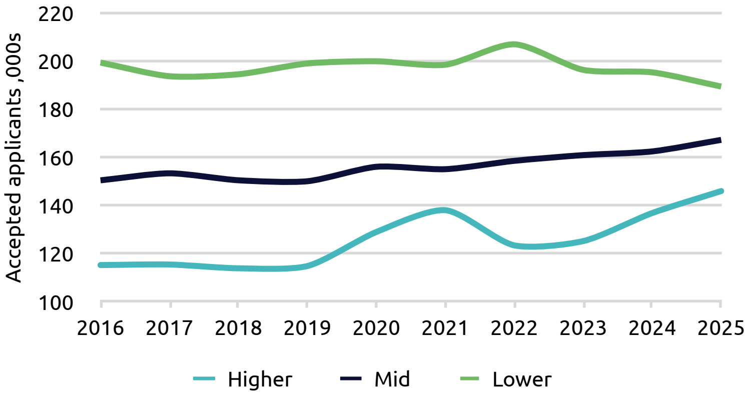
Table 2: Two level redistribution[4]

Source of displaced students	Magnitude
Mid tariff / lower tariff → higher tariff	10,000 to 15,000
Lower tariff → mid tariff	5,000 to 8,000

Taken together, these effects form a cascade. Expansion at the top of the system leads to adjustment in the middle, which in turn places pressure on lower-tariff providers.

The cumulative effect is a material displacement of students from lower-tariff providers, estimated at approximately 15,000 to 23,000 entrants. When translated from entrants, as shown here, into total student numbers, this represents a substantially larger impact across the system: lower-tariff providers together have 50,000 to 75,000 fewer students who might otherwise have attended their institutions but have been displaced to mid-tariff and higher-tariff providers.

Figure 6: Acceptances by tariff group (higher tariff / mid tariff / lower tariff)



Source: UCAS End of Cycle data, 'Tariff group of provider – acceptances' (UK-domiciled applicants), 2016 to 2025; author's calculations

This pattern is consistent with the evidence shown in Figure 6, which presents total acceptances by tariff group over time. The chart tells the same story as Figure 3, but rather than percentage change it shows the changes in the actual numbers of enrolments, demonstrating the clear divergence previously observed: higher-tariff recruitment has increased, while mid-tariff recruitment has remained broadly stable and lower-tariff recruitment has declined.

The redistribution dynamics described above have distinct implications for different parts of the sector.

Mid-tariff providers face a progressive loss of marginal students as higher-tariff institutions expand into their traditional recruitment space. This leads to tariff compression, as entry requirements are adjusted downward, and to increased volatility in recruitment outcomes.

Lower-tariff providers are exposed to the cumulative effects of redistribution. Reduced inflows, intensified competition and limited scope for further expansion create conditions of structural vulnerability. This is reflected in reduced enrolment, even during a time of a growing young population. In adverse scenarios, this is likely to translate into significant financial and operational risk, as reduced intakes and the consequent financial problems compromise their viability.

At the system level, these dynamics result in a sector that is more competitive, more hierarchical and potentially less stable over time.

Scenarios

The scenarios presented in this section are illustrative projections designed to explore how different patterns of institutional behaviour may affect the distribution of students across the sector.

Three scenarios are considered:

A. equal adjustment across tariff groups;

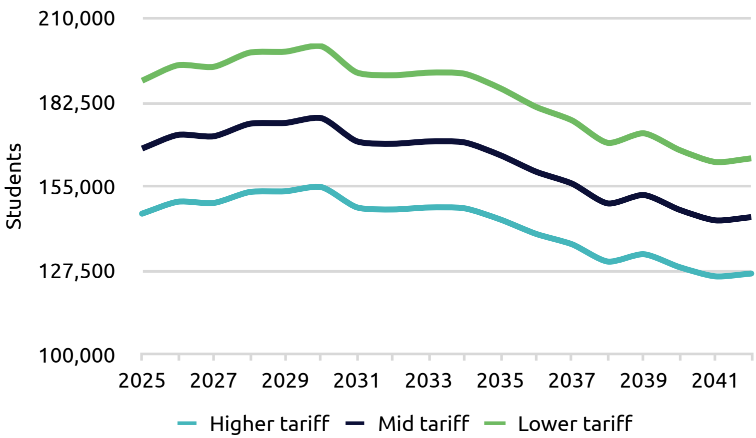
B. higher-tariff providers increase recruitment to 2030 in line with recent trends and then maintain recruitment at 2030 levels; and

C. higher-tariff providers continue to increase recruitment through the 2030s, though at a reduced rate, despite a declining 18-year-old population.

The analysis is subject to a number of limitations. The scenarios are constructed by taking 2025/26 as a baseline and applying alternative assumptions about the future trajectory of higher-tariff recruitment. Total student numbers are assumed to follow demographic trends, and participation rates to remain broadly constant. Changes in higher-tariff recruitment are then distributed across mid- and lower-tariff providers in a manner consistent with observed patterns, whereby expansion at the top of the system is associated with compression further down. The results should therefore be interpreted as indicative of direction and scale rather than predictive. But they do illustrate the seriousness of the coming downturn for institutions across the sector.

Scenario A: Equal adjustment

Figure 7a: Scenario A – Equal adjustment



Source for Figures 7a, 7b, 7c: UCAS End of Cycle data (acceptances by tariff group, 2016 to 2025); ONS population projections; author's modelling

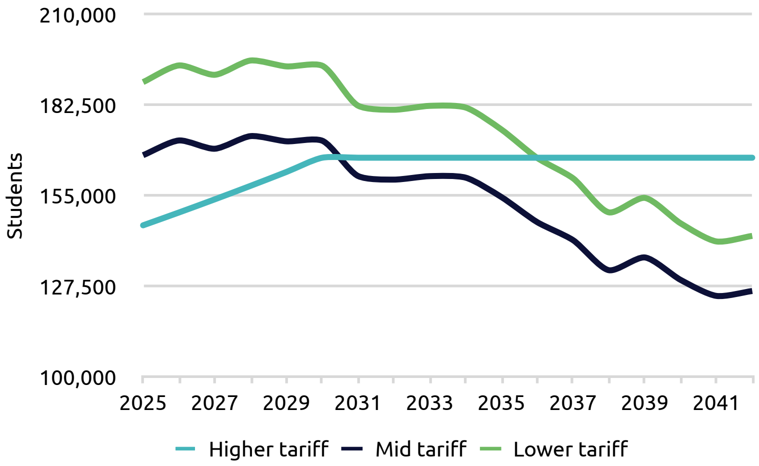
Under an equal-adjustment scenario, all three tariff groups grow modestly to around 2030 and then decline in line with demographic change thereafter. Higher-tariff providers do not protect their numbers relative to the rest of the sector, and the contraction after 2030 is shared broadly across all groups.

On this basis, recruitment in higher-, mid- and lower-tariff providers each falls by around 18.5 per cent to 19 per cent between 2030 and 2042.

Although there is little reason to expect higher-tariff providers voluntarily to adopt this pattern of behaviour, Scenario A provides a useful neutral benchmark in which demographic decline is not accompanied by further redistribution across the sector. It represents a case in which institutions adjust proportionately to changes in the size of the student population, without altering their relative position within the system.

Scenario B: Higher-tariff providers hold 2030 numbers

Figure 7b: Scenario B – Higher-tariff providers hold 2030 numbers



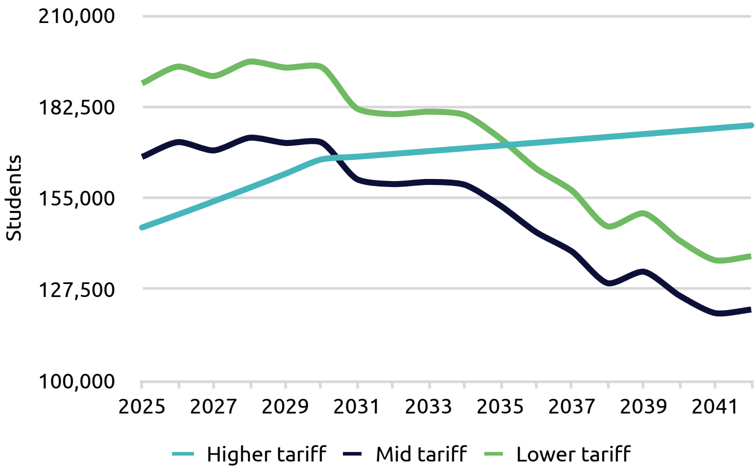
Under this scenario, higher-tariff providers continue to grow to 2030 in line with recent trends and then maintain those 2030 recruitment levels despite falling overall demand thereafter. This reflects a strategy of protecting income by preserving peak student numbers in a shrinking market.

Even under this relatively modest assumption, the consequences for mid- and lower-tariff providers are significant. Taken together, these institutions would face declines in recruitment of around 26 per cent between 2030 and 2042. If, in addition, mid-tariff providers continue to expand into the pool of applicants previously available to lower-tariff institutions, the latter could face sharper reductions still.

This scenario illustrates how demographic decline can be distributed unevenly across the sector when higher-tariff providers seek to maintain their intakes.

Scenario C: Continuing growth by higher-tariff providers

Figure 7c: Scenario C – higher-tariff continued growth



Under the most expansionary scenario, higher-tariff providers continue to grow to 2030 and then continue to increase recruitment modestly through the 2030s, at around half the rate of their increase to 2025, despite falling total demand.

On the assumptions used here, higher-tariff recruitment is around 6 per cent above its 2030 level by 2042. The consequence is that mid- and lower-tariff providers absorb all of the contraction, with average recruitment in each group falling by around 29 per cent between 2030 and 2042. As in Scenario B, if the cascade effect persists, the impact will fall disproportionately on lower-tariff providers. This scenario represents the strongest concentration of recruitment in higher-tariff institutions and the greatest pressure on the rest of the sector.

It is possible that higher-tariff institutions will not, in practice, continue to expand recruitment in this way. The frequently expressed concern that universities 'lose' money on domestic students may indicate limits to the attractiveness of further growth. Or perhaps that complaint should be taken with a pinch of salt. The notion of 'losing' money on domestic students generally means no more than that the 'profit' that universities earn from international students, conferences, accommodation, et cetera, is used to subsidise what they spend on domestic students.

Past behaviour suggests that institutions will continue to seek to generate income where possible in order to sustain their level of activity, even where this places pressure on resources such as staff:student ratios. While this does not guarantee continued expansion, it is a plausible behavioural assumption for the purposes of scenario modelling, and represents a plausible future that should be taken seriously by policymakers and those responsible for managing and governing universities.

Indeed, this may in fact appear more realistic than Scenario B, and certainly more so than Scenario A. The financial pressure on institutions will not have reduced, and the imperative to maintain income wherever possible will remain. If higher-tariff institutions are able to increase numbers, notwithstanding the sharp demographic decline, there will be every incentive for them to do so. For those institutions concerned, this would likely require further reductions in tariff requirements, with implications for their character and positioning.

System-level implications

These scenarios highlight how institutional behaviour – particularly that of higher-tariff providers – will play a decisive role in shaping how demographic change is experienced across the sector. Across all scenarios, total student numbers are ultimately determined by demographic trends. The key difference between them is therefore not whether the system expands or contracts, but how that expansion or contraction is distributed across provider groups.

If higher-tariff providers are able to grow or maintain their numbers, the effects of demographic decline will be concentrated disproportionately in mid- and lower-tariff providers. By contrast, in Scenario A the impact of demographic change is distributed broadly evenly across the sector, because institutions adjust proportionately rather than seeking to preserve or increase their relative position.

An outcome resembling Scenario A would, in practice, be likely to require some form of constraint on recruitment behaviour, limiting the extent to which higher-tariff providers are able to expand their intake. Avoiding the more adverse outcomes illustrated in Scenario B, and more particularly in Scenario C, would also likely require explicit limits on such expansion, including the possible introduction of recruitment controls.

Such measures would represent a departure from current market-driven arrangements and would require explicit policy intervention. However, this is likely to be necessary if the integrity and balance of the higher education system as a whole are to be maintained.

Conclusion

The further expansion of higher-tariff providers into mid-range attainment recruitment represents a significant structural shift in the English higher education system.

The evidence presented in this report suggests that a substantial proportion of the recent growth in higher- and mid-tariff universities is redistributive rather than purely demographic. As higher-tariff providers expand into the middle of the attainment distribution, they reduce the pool of students available to other providers. This effect is amplified by secondary adjustments within the system, creating a cascade in which mid- and lower-tariff providers experience cumulative pressure.

Looking to the future, the scenario analysis shows that, as in the past, the future trajectory of the sector depends not only on demographic change, but on how institutions respond to it. Total student numbers are likely to rise modestly and then fall in line with the 18-year-old population. However, the distribution of that change varies significantly across scenarios. Even in the most neutral scenario, institutions across the sector – including higher-tariff institutions – face a substantial reduction in demand – of 18.5 per cent to 19 per cent on average. However, if higher-tariff institutions continue to protect or expand their recruitment, the burden of contraction will fall disproportionately on mid- and lower-tariff providers, which will face reductions in student numbers of an average of 30 per cent – some may face smaller reductions, but in that case others will face greater.

This pressure comes on top of a long period in which institutions have, for understandable reasons, adjusted to growth. All institutions, and higher-tariff institutions in particular, have expanded their estates, recruited staff and developed infrastructure in response to rising numbers. The behaviour of higher-tariff institutions is therefore not irrational: it reflects the financial incentives built into the present system.

There are possible mitigations. Participation could rise again, as discussed above, though it would be unwise to count on that. Mature and part-time student demand could increase, particularly as the Lifelong Learning Entitlement (LLE) begins to take effect; and international or transnational recruitment could offset part of any decline in domestic numbers. But there is, for the time being and until the effects of the LLE can be seen, little evidence of an increase in part-time and mature demand – indeed the opposite appears recently to have been the case – or that international or transnational recruitment will be sufficient to avert a significant contraction. Prudence therefore suggests that institutions and governing bodies should plan on the basis that substantial reductions in student numbers are likely.

The central issue is not whether the system contracts, but how that contraction is distributed across institutions. These findings raise important questions about the future structure, balance and stability of the sector. A system in which contraction is concentrated in particular groups of institutions is likely to become more hierarchical and less stable over time.

If current trends persist, some form of policy response is likely to be required if system balance is to be maintained, and unplanned closures are to be avoided. It is difficult to see how such a response could be effective without operating, at least in part, through constraints on institutional recruitment. Such controls are not unprecedented: number limits existed for much of the 1990s and early 2000s, partly for financial reasons and partly to ensure that institutions did not recruit more students than they could support adequately.

It is true that policy interventions of this kind would sit uneasily with the market ethos that has governed higher education in recent years. It would also imply the politically difficult decision effectively to restrict choice for significant numbers of applicants with modest grades who might otherwise have hoped to gain entry to a higher-tariff university – it would appear to fly in the face of the view that students are more important than institutions. However, without some form of corrective action, it is highly likely that perfectly good universities – institutions that are doing an excellent job and adding real value for the students they recruit and the regions they serve – may fail, and that a critical part of the national infrastructure will be damaged. Policymakers have a choice – to allow the market to determine the future shape of higher education or to court a degree of possible unpopularity by imposing a limited curb on student options.

Recommendations

For much of its existence the Office for Students (OfS), which was set up to have regard to the interests of students, has taken a very narrow view of its remit, and in particular has paid no regard to the wider national – and student – interest in a healthy and diverse higher education system.

It is encouraging that now with new leadership there are signs this may be changing. It is imperative that it does so.

To the Government

In an ideal world the Government would replace the Office for Students with a regulatory body that also has a quasi-planning role and which has responsibility for maintaining the diversity and health of the higher education sector. However, given the statutory basis for the OfS, it would require fresh legislation to achieve this – unlikely in present circumstances. Failing that:

- The Government should restate the remit of the Office for Students to take explicit account of the integrity of the sector as a whole, and ensure a healthy and diverse higher education system, with healthy and high-quality institutions throughout the country, able to meet the needs of a varied range of students with different needs.
- Either directly itself or through the Office for Students, the Government should introduce a recruitment cap on individual universities. How such a cap would function would need to be determined, but its aim and effect should be unambiguous – to curb predatory activity – and will likely require limiting the intakes of individual institutions.

To the Office for Students

- The Office for Students should restructure itself to ensure that it is staffed with the skills and knowledge to enable it to fulfil this wider remit.

To Governing Bodies

- Governing bodies should consider strategies that take explicit account of the demographic downturn after 2030.

Technical note

The analysis in this report draws on two related but distinct datasets. Demographic and participation trends, using acceptances as a proxy for participation, are based on ONS population data for England and UCAS data on UK-domiciled 18-year-olds accepted to providers in England, while system-wide recruitment patterns by tariff group are based on UCAS data on UK-domiciled acceptances across all providers.

These datasets are used for different analytical purposes and reflect the structure of UCAS published data. The distinction does not materially affect the conclusions of the report. The analysis is concerned primarily with trends over time rather than precise levels, and England accounts for the large majority of UK-domiciled entrants. The patterns observed are therefore robust to these differences.

Endnotes

1 The UCAS tariff groups used in this analysis were originally constructed (in around 2012) so that each group accounted for approximately one third of UK 18-year-old acceptances at that time. These groupings are not reconstituted annually. Instead, providers remain within their assigned tariff group over the time series, meaning that the distribution of acceptances across the groups may diverge from equal thirds over time. Although there was a reclassification in January 2026, the data contained in this report relate to years when the 2012 classification applied, and it is that classification that is used here.

2 Unless otherwise stated, data refer to UK-domiciled 18-year-old acceptances to providers in England. Population is proxied using England live births shifted forward by 18 years. While migration will add to the absolute numbers, analysis of ONS migration projections suggests that the pattern described here will be maintained. Acceptances refer to UK-domiciled applicants accepted to providers in England (UCAS End of Cycle data, 2010 to 2025). It should be noted that acceptances do not represent total participation, but provide a consistent indicator of recruitment patterns.

3 Central estimates (using a 50 per cent allocation of the 113 to 128 tariff band and all those above; results are indicative and sensitive to alternative allocations).

4 These estimates are derived by allocating proportionally observed changes in recruitment across tariff groups and should be interpreted as indicative.

The first 200 HEPI Reports

As this HEPI Report is number 201, it is a good moment to take stock of the first 200. Hard copies of many of these documents are still available from the HEPI office.

HEPI's other written output not listed below includes almost 50 Debate Papers and around 70 Policy Notes as well as one-off papers and web releases, plus the daily blog. All HEPI's past output can be accessed on the HEPI website at www.hepi.ac.uk.

1. Bahram Bekhradnia, *Widening Participation and Fair Access: An Overview of the Evidence*, HEPI Report 1, February 2003
2. Libby Aston, *HE supply and demand to 2010*, HEPI Report 2, June 2003
3. Libby Aston and Bahram Bekhradnia, *Graduate Supply and Demand: A Consideration of the Economic Evidence*, HEPI Report 3, September 2003
4. Bahram Bekhradnia, *Demand for HE to 2010: Some Political and Policy Implications*, HEPI Report 4, September 2003
5. Bahram Bekhradnia, *Implications of the Government's proposals for university title: or What is a University?*, HEPI Report 5, November 2003
6. Jonathan Adams and Bahram Bekhradnia, *What future for dual support?*, HEPI Report 6, February 2004
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English higher education faces structural tension shaped by demographic change, financial pressures and competitive recruitment.

This paper examines the recent changes in universities' recruitment patterns, with a particular focus on how some high-tariff institutions have rapidly expanded, before analysing the consequences for the sector as a whole.

The author, Bahram Bekhradnia, ends by painting some alternative futures.

HEPI was established in 2002 to influence the higher education debate with evidence. We are UK-wide, independent and non-partisan.

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