

Scottish Results Day 2018

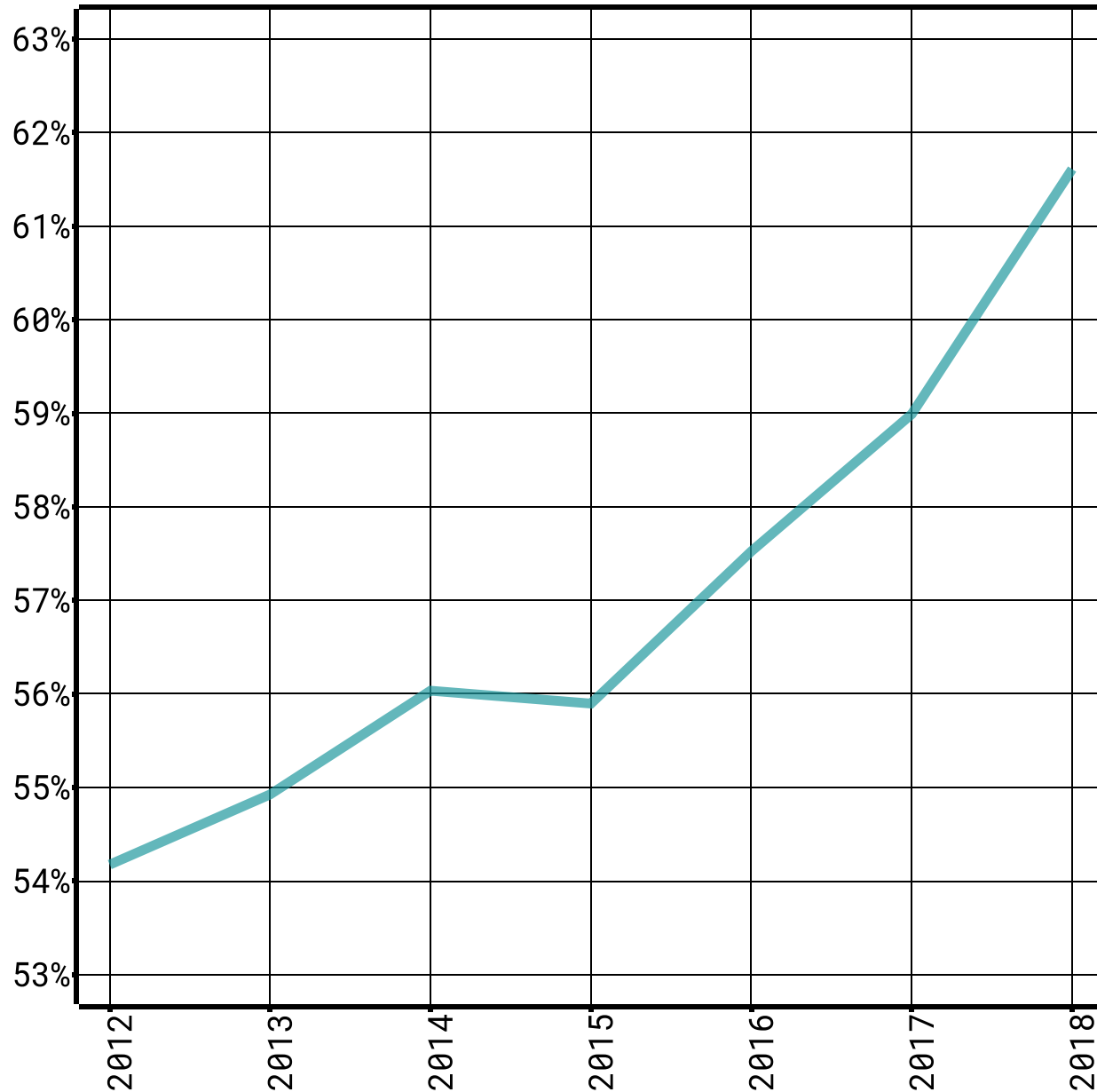
Some messages from our analysis of the UCAS data

dataHE

7 August 2018

Pressure on getting in eases further

Placed rate (at SRD), Main scheme applicants from Scotland



dataHE_DHESRD01

If you want to go to university and live in Scotland things are getting easier. Falling cohort sizes in Scotland and slightly falling EU recruitment are meeting (more or less fixed) funded numbers.

This is pushing up the chances of Scottish applicants winning a place. We expect this trend to continue in future years.

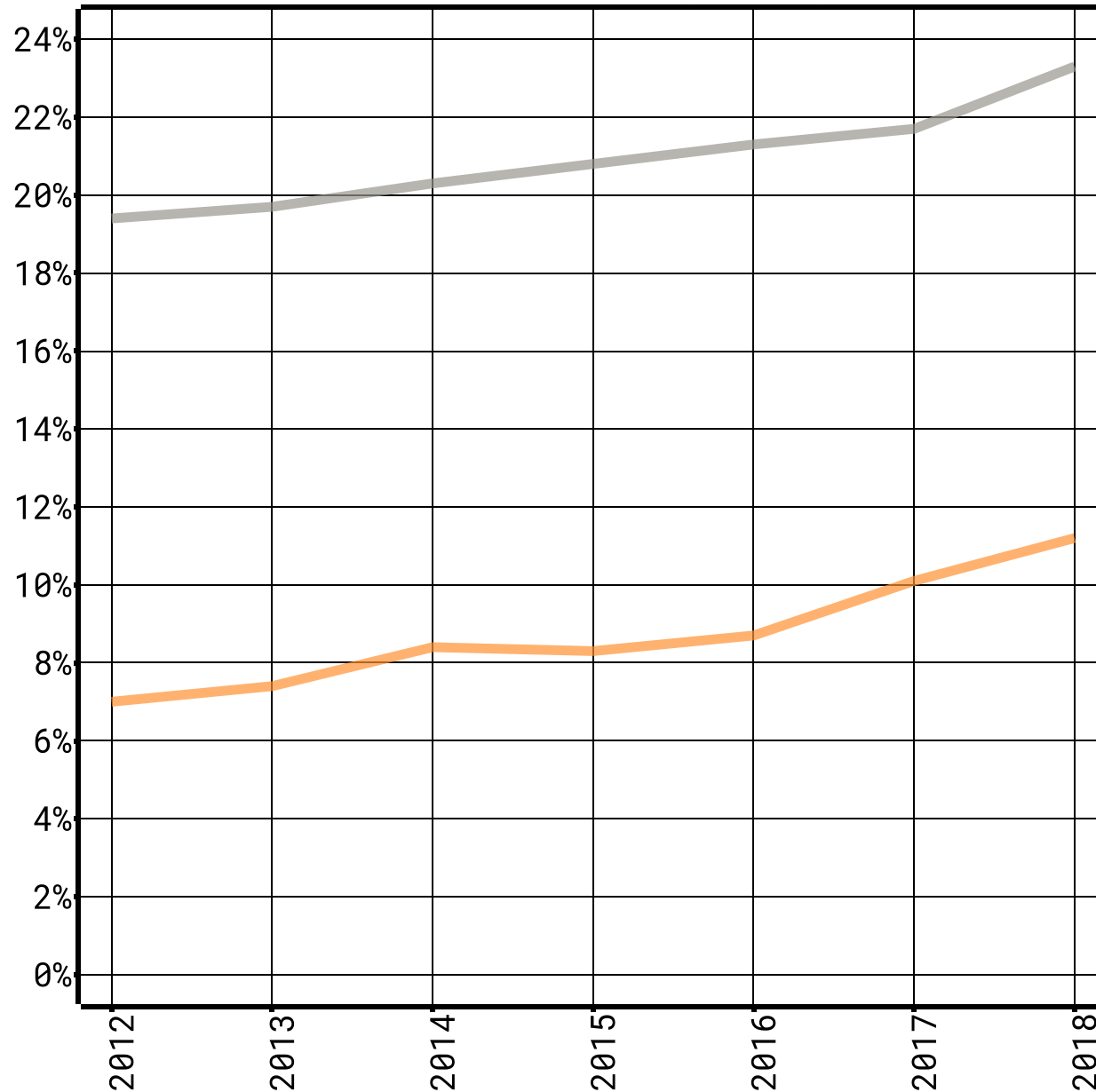
■ Placed rate

Our preferred measure of this is the proportion of Main scheme applicants who are placed by Scottish Results Day

It has surged nearly 3 points to over 60% for the first time this cycle. More are getting their first choice and fewer will be looking in Clearing.

Jump in entry not just for Q1 this year

18 year old entry rates, Scotland (at SRD)



dataHE_DHESRD03

Last year saw a jump in the entry rate of 18 year olds living in SIMD Q1 (the poorest fifth) of areas on results day. This has continued this year with the chances of these young people entering university increasing by over 10% proportionally. This is high, similar to maximum annual gains seen in the rest of the UK in over the past five years.

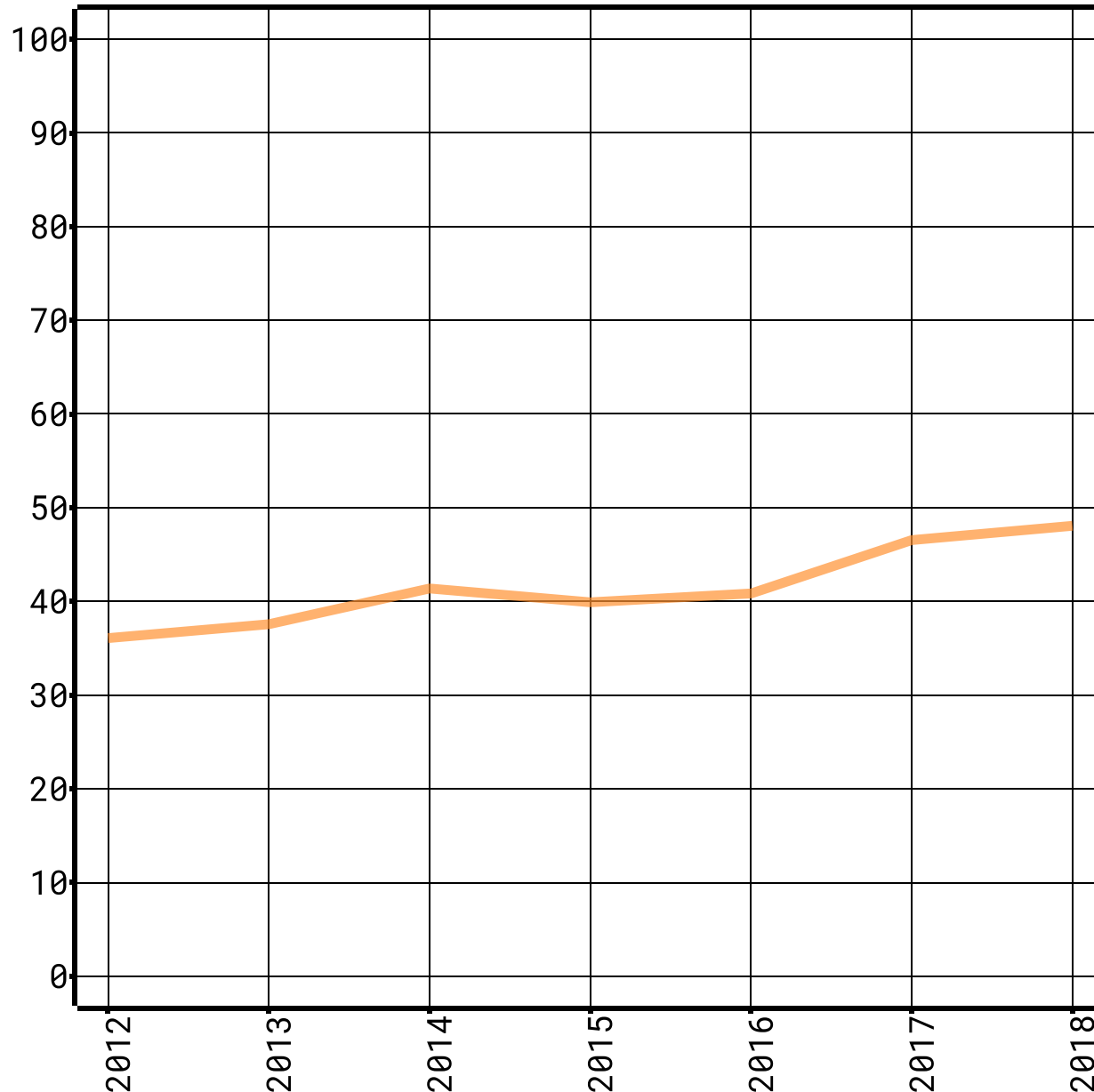
- SIMD Q1 18 year olds
- All 18 year olds

What is different for this result day is that there has also been a jump in entry rates for 18 year olds in Scotland more generally.

These increases extend to richer areas which saw falls in entry rates last year.

Making access targets more demanding

SIMD Q1 entry rate index (at SRD) relative to all 18 year olds=100



dataHE_DHESRD04

The policy on access in Scotland centres around increasing the proportion of SIMD Q1 *amongst* students. As a relative target it means that the effect on the target of Q1 increases can be blunted if entry rates are rising for other groups too.

With Q1 already increasing as fast as has ever been seen, this makes reaching the target proportion hard.

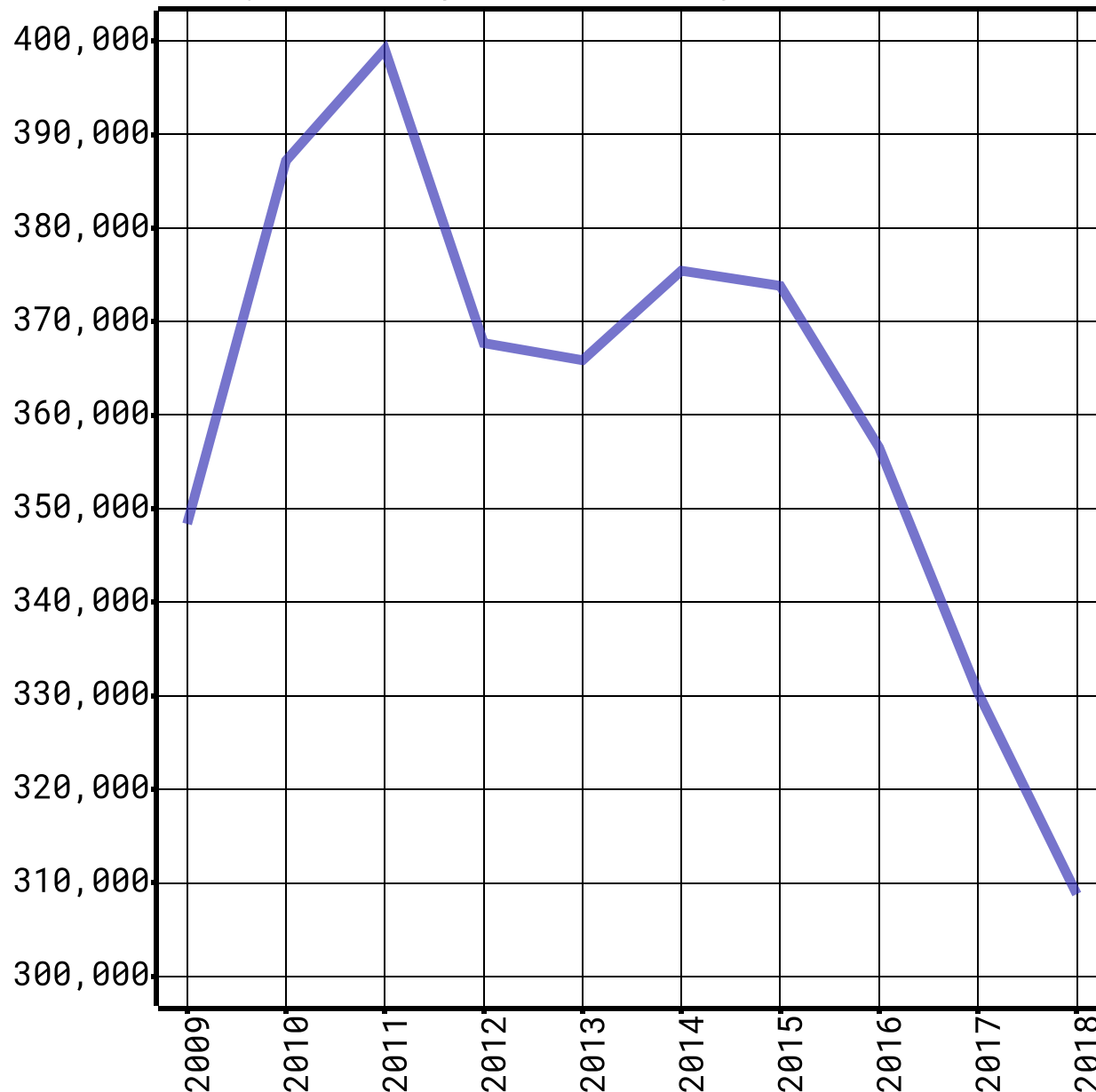
■ SIMD Q1 rate index

The graph shows the 18 year old SIMD Q1 entry rate indexed to that of the 18 year entry rate. Very roughly, it should be around 100 if 20% of students were Q1.

It hasn't moved much this year compared to last despite the similar Q1 increases. This is because more people from other groups are entering too.

Wider recruitment outlook? Difficult

Main scheme yet to be placed from England, Wales, Northern Ireland (SRD)



dataHE_DHESRD05

Recruitment of students from the core E/W/NI to the UK sector is substantially up on this point last year, driven by 18 year olds.

We expected 18 year olds to be up by a bit more given the number of UFs UCAS reported last month, suggesting the underlying recruitment climate in this core market could be weak.

■ Yet to be placed

The graph shows the total of Main scheme applicants 'yet to be placed' from E/W/NI.

This statistic is at its lowest recorded value in the sequence and for many providers recruitment will feel 'harder' than even recent cycles. We expect these difficult market conditions to persist for several cycles.