

Higher Education in the South West

A Report by the Marchmont Observatory

Written by Adam Crews

Edited by Chris Evans

May 2011



European Union
European Social Fund
Investing in jobs and skills



South West RDA

Contents

Contents.....	2
Figures	3
Tables	3
Executive Summary	4
1. Introduction	6
1.1 Background	6
1.2 HE provision and institutions.....	6
1.3 Methodology.....	7
1.4 Strategically important subjects	8
2. Participation in HE.....	9
2.1 Total HE applications	9
2.1.1 Total applications by subject	10
2.2 Accepted HE applications	11
2.2.1 Accepted applications by age.....	14
2.2.2 Accepted applications by subject	14
2.3 Trends in student numbers	15
2.3.1 Characteristics of students	16
2.3.2 Students numbers by HEI.....	18
2.4 The Widening Participation agenda	19
2.4.1 Aimhigher South West.....	19
2.4.2 Participation from state sector schools/colleges.....	20
2.4.3 Participation from target socio-economic groups	22
2.4.4 Participation from low participation neighbourhoods	24
2.5.1 Income to HEIs.....	26
2.6 Qualifications achieved	28
2.6.1 Qualifications achieved by subject	29
2.7 Destinations of graduates	30
2.7.1 Retention/outflow of graduates.....	32
2.7.2 Inflow of graduates into the region for employment	32
References.....	34

Figures

Figure 1: Total HE applications in the South West, 2001-2009	9
Figure 2: Accepted HE applications in the South West, 2001-2009	12
Figure 3: Total HE students at South West HEIs, 2003/04 to 2008/09	16
Figure 4: Percentage of HE students from state schools/colleges, South West vs England, 2003/04 – 2008/09	21
Figure 5: Percentage of HE students from target socio-economic groups, South West vs England, 2003/04 – 2008/09	23
Figure 6: Income to South West HEIs, 2004/05-2008/09 (percentage).....	27

Tables

Table 1: Total HE applications in the South West by HEI, 2001-2009	10
Table 2: Total HE applications in the South West by subject, 2001-2009	11
Table 3: Accepted HE applications in the South West by HEI, 2001-2008	13
Table 4: Accepted applications by age in South West institutions, 2001 to 2009	14
Table 5: Accepted HE applications in the South West by subject, 2001-2009	15
Table 6: Undergraduate & postgraduate student numbers, 2003/04 - 2008/09	17
Table 7: Student numbers by gender, 2003/04 - 2008/09	17
Table 8: Full and Part-time Student Numbers, 2003/04 - 2008/09	18
Table 9: UK and Overseas Student Numbers, 2003/04 - 2008/09	18
Table 10: Student numbers by South West HEI, 2003/04 - 2008/09.....	19
Table 11: Percentage of young HE students from state schools/colleges, South West HEIs, 2003/04 – 2008/09	22
Table 12: Participation of young people from target socio-economic groups in higher education 2003/04 to 2008/09	24
Table 13: Participation of young people from 'low participation neighbourhoods in HE 2006/07 to 2007/08	25
Table 14: Participation of mature students from 'low participation neighbourhoods in HE 2006/07 to 2008/09	26
Table 15: Income to South West HEIs, 2008/09 (£ millions)	27
Table 16: Income to South West HEIs, 2004/05-2008/09 (£ millions)	28
Table 17: HE Qualifications achieved in the South West by type, 2003/04-2008/09	28
Table 18: HE Qualifications achieved in the South West by HEI, 2003/04-2008/09	29
Table 19: HE Qualifications achieved at South West HEIs by subject, 2003/04 – 2008/09	30
Table 20: Destinations of graduates from South West HEIs, 2008/09	31
Table 21: Region of employment from those entering employment from South West HEIs, 2008/09 .	32
Table 22: Graduates employed in the South West by region of study, 2008/09	33

EXECUTIVE SUMMARY

- There are 12 Higher Education Institutions (HEIs) in the South West region, which, in 2008/09, had a combined income of £1,474 million. The HEIs vary significantly in terms of their income and student numbers.
- Demand for places at HEIs in the region has consistently increased in recent years, with a 25% rise in the number of applications made through UCAS between 2001 and 2009 and a 6% rise from 2008. Most HEIs have seen an increase in applications in this time.
- In terms of strategic subjects, the overall picture is positive, with an increase of 18% in applications since 2001. However, there has been a 25% drop in the number of applications in Mathematical Sciences and Informatics.
- The number of applications accepted by HEIs has risen similarly, although again, there is some difference between individual institutions.
- There were a total of 158,900 students at South West HEIs in 2008/09, an increase of 7.9% since 2003/04. There were also 21,600 distance learning (mainly Open University) students living in the region. The most recent year has seen a rise of around 6% in student numbers (8,900) in the region. This has been driven by strong growth in full-time undergraduate students, which national policy has been geared towards increasing.
- In terms of student characteristics, some 57% were female, and this 'gender gap' has not closed in recent years. Almost 80% of HE students were studying at undergraduate level, and just over a quarter of all students were studying on a part-time basis. Around 12% of the region's students are from overseas.
- Regarding the widening participation agenda, the proportion of students from state sector schools or colleges in the South West has risen slightly in the last year but remains almost four percentage points lower than the national average.
- The proportion of young people from 'low participation neighbourhoods' across the South West has remained fairly static in the last two years (at a time when it has risen nationally), and is lower than for England as a whole. There has also been a stagnation in the proportion of mature students coming from areas of low participation.
- The proportion of young people from targeted socio-economic groups in the South West has risen in the last year, in line with the national trend.
- The number of qualifications achieved has decreased by 2.8% in the last year. Foundation degrees have been where the most short-term growth has occurred.

- By subject, the biggest increases in qualifications achieved were in Medicine & related, Biological sciences, Veterinary science, Architecture, building and planning and Social studies. The majority of the strategically important subjects have seen an increase in qualifications achieved in recent years. The only exception was in Computer science, which has fallen by around a third since 2003/04.
- Just under two-thirds of the region's graduates entered employment after completing their studies, while a quarter went on to further study. There are some signs of a pick-up in the graduate employment market, with several leading employers planning to increase the number of graduates they employ.
- The South West retains around 60% of its graduates i.e. those who remain in the region for employment after their studies. Of the 40% (around 7,500) who leave the region after graduating, these are replaced by a similar number of graduates who were in HE elsewhere in the UK but come into the region to work. There may well be intra-regional disparities in where graduates go to work, but no analysis is possible with the data currently available.

1. INTRODUCTION

1.1 Background

This report provides an analysis of the scale and nature of participation in Higher Education (HE) activity in the South West. This is the third in a series of annual reports on HE participation and provides an important benchmark against which to measure changes in participation which are anticipated to take place as a result of changes in HE finance and the raising of tuition fees for students.

Much of the data is presented at institutional level. This should enable it to be of use to local authorities, the emerging Local Enterprise Partnerships (LEPs) and Employment and Skills Boards (ESBs).

Determining the true effect of tuition fees on the demand for HE is likely to be difficult. Simply looking at student numbers before and after the introduction of tuition fees is likely to be informative but quite problematic, given that there has been a spectacular rise in the number of HE entrants over the last 30 years. Nevertheless, we will be in a position to view the changes in the context of recent trends.

The report covers the following areas:

- Numbers of people participating in HE.
- Characteristics of those participating in HE.
- Participation in HE from low participation neighbourhoods.
- Trends in applications including subjects applied for.
- Number of people graduating.
- Trends in subjects for those graduating.
- Relationship to strategic subjects.
- Graduate destinations.

1.2 HE provision and institutions

With the incorporation of Dartington College of Arts into University College Falmouth, there are now 12 Higher Education Institutions (HEIs) in the South West: eight universities, four university colleges (the Arts University College at Bournemouth now has University College Status) and the Open University operation in the region:

- The Arts University College at Bournemouth
- Bath Spa University
- Bournemouth University
- University College Plymouth St Mark & St John (UCP Marjon)
- Royal Agricultural College
- University College Falmouth
- University of Bath
- University of Bristol
- University of Exeter
- University of Gloucestershire
- University of Plymouth
- University of West of England, Bristol (UWE)

In addition, there are 28 Further Education colleges (FE colleges) teaching recognised courses of HE. The largest concentration of HE provision is in the Bristol and Bath area, with four universities, one HE college campus and three FE colleges teaching HE courses.

HEIs range in size from the University of Plymouth, with almost 30,000 students, to the Royal Agricultural College with less than a thousand.

1.3 Methodology

This paper draws together information from a variety of data sources, chiefly from the following organisations:

- Higher Education Funding Council for England (HEFCE)
- Higher Education Statistics Agency (HESA)
- UCAS

Wherever possible, data has been analysed between the years of 2001 and 2008 (the latest year for which data is available) to establish recent trends.

Data is also provided for each of the 12 main HEIs in the region (wherever possible), along with an aggregate total for all HE activity within FE colleges.

1.4 Strategically important subjects

Work by HEFCE has identified a number of subject areas that are considered to be of national strategic importance, based on the following criteria:

- Does the subject currently provide vital research and/or graduates with recognisably specialist knowledge, skills and competencies to the economy or society?
- Is there a substantiated prediction that vital research and/or graduates with recognisably specialist knowledge, skills and competencies will be required by the economy, society or government in future?

In response to a letter from the Secretary of State for Education & Skills, HEFCE's Strategic and vulnerable subjects advisory group identified the following subjects as being nationally strategically important:

- Science, Technology, Engineering and Mathematics;
- Area studies and related minority languages, including:
 - Arabic and Turkish language studies and other Middle Eastern area studies, former Soviet Union Caucasus and central Asian area studies;
 - Japanese, Chinese, Mandarin and other far eastern languages and area studies;
 - Courses relating to recent EU accession countries, especially those in Eastern Europe and the Baltic (which includes new accession countries such as Bulgaria and Romania scheduled for entry in January 2007);
- Modern foreign languages;
- Quantitative social science.

Where possible, the analysis in Section 2 of this report will incorporate the above subject areas.

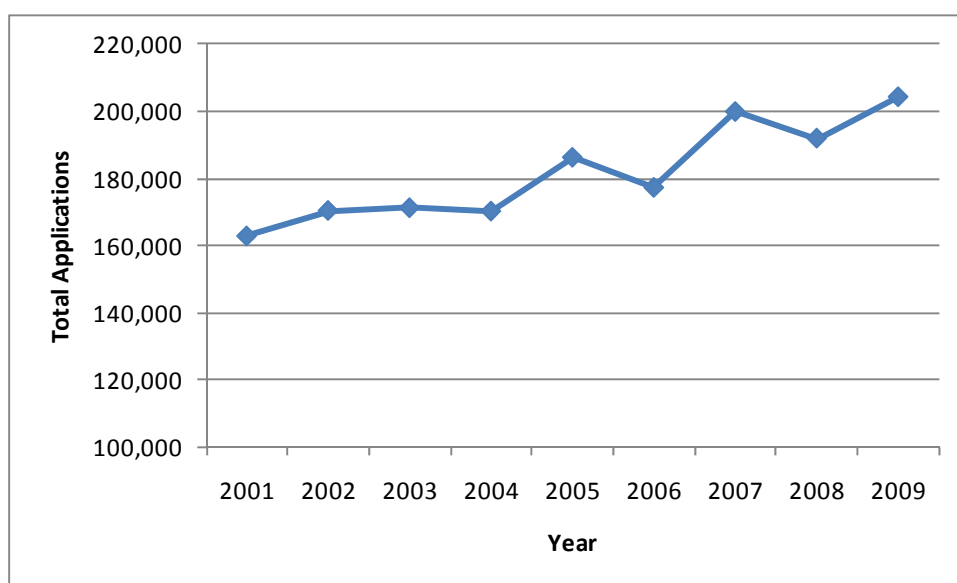
2. PARTICIPATION IN HE

2.1 Total HE applications

One indicator of the level of demand for HE is the number of applications. In 2009, UCAS received a total of 204,084 applications to HEIs (or FE colleges) in the South West. This represented an increase of 25% since 2001 and an increase of 6.3% on the previous year. Figure 1 shows that the number of applications stayed fairly constant between 2002 and 2004, before sharp growth during 2005, and again between 2006 and 2007.

A slight drop in applications between 2007 and 2008 should not be interpreted as indicating a fall in demand for HE provision. Changes were made to the UCAS entry system for 2008, which reduced the number of choices that applicants could make from six to five. Taking this into account, it appears that demand for HE places in the South West remains strong, despite the difficult economic conditions at that time.

Figure 1: Total HE applications in the South West, 2001-2009



Source: UCAS

Table 1 below shows the number of applications received by individual institution. This shows that the increase in applications made has been uneven between institutions. Whilst some institutions have seen massive *proportional* increases in applications in the last year, such as in Exeter, Gloucestershire, Bournemouth and UCP Marjon, *numerically*, the greatest increases have been to institutions in Exeter, UWE and Bournemouth.

Two HEIs in the region saw a fall in applications made in the last year - Bristol and Bath - which have declined by 3.3% and 1.0% respectively, suggesting a slight decline in their popularity among applicants. However, the number of applications remains significantly higher than in 2001.

Table 1: Total HE applications in the South West by HEI, 2001-2009

Institution	2001	2008	2009	Change 2008-2009	% change 2008-2009
Bath Spa University College	6,799	10,988	11,157	169	1.5%
Bournemouth University	15,909	19,669	22,182	2,513	12.8%
Dartington College of Arts (now known as University College Falmouth inc Dartington College of Arts)	484	499	524	25	5.0%
University College Falmouth Incorporating Dartington College of Arts	1,862	3,070	3,343	273	8.9%
UCP Marjon	2,710	2,253	2,569	316	14.0%
Royal Agricultural College	384	829	847	18	2.2%
The Arts Institute at Bournemouth	2,575	4,980	5,570	590	11.8%
The University of Gloucestershire	11,063	8,541	10,144	1,603	18.8%
University of Bath	17,912	19,990	19,786	-204	-1.0%
University of Bristol	35,146	42,633	41,225	-1,408	-3.3%
University of Exeter	19,045	23,784	27,979	4,195	17.6%
University of Plymouth	19,678	20,298	21,062	764	3.8%
University of the West of England, Bristol	24,297	27,204	29,768	2,564	9.4%
FE Colleges	5,068	4,889	5,287	398	8.1%
Other*	0	2,219	2,641	422	19.0%
HEI Total	157,864	184,738	196,156	11,418	6.2%
Total	162,932	191,846	204,084	17,890	9.6%

Source: UCAS

Note: * The Peninsula Medical School was established as a partnership between the Universities of Exeter and Plymouth and the NHS in Devon and Cornwall on 1 August 2000. The first intake of 130 undergraduate students commenced their studies on 30 September 2002.

2.1.1 Total applications by subject

Table 2 shows the total number of applications by subject. The greatest proportionate rise in applications was in Medicine/Dentistry, where applications more than doubled between 2001 and 2009. This was partly in response to the opening of the Peninsula Medical School (a partnership between the Universities of Exeter and Plymouth and the NHS in Devon and Cornwall) in 2002, as part of a national expansion of medical student numbers in the UK. There have also been significant increases in applications to Creative arts, Combined arts and science combined with social studies or arts courses. In terms of strategic subjects, the overall picture is positive, with an increase of 18% in applications between 2001 and 2009. However, while Biological and Physical sciences, Engineering & technology and Languages have all seen a substantial increase, there has been a 25% drop in the number of applications in Mathematical sciences and informatics. In the last year, the number of applications in strategic subjects rose by 5.4%, still below the average for all subjects (6.4%). Encouragingly, all strategic subjects saw an increase in applications, although the increase in Mathematical sciences and informatics was fairly limited, at 2.4%.

Table 2: Total HE applications in the South West by subject, 2001-2009

Subject	2001	2008	2009	Change 2008-09	% change 2008-09
A Medicine/Dentistry	2,288	7,452	8,196	744	10.0%
B Subjects allied to medicine	9,353	13,968	15,839	1,871	13.4%
<i>C Biological sciences</i>	<i>9,327</i>	<i>16,038</i>	<i>17,470</i>	<i>1,432</i>	<i>8.9%</i>
D Agriculture and related subjects	3,499	3,661	3,890	229	6.3%
<i>F Physical sciences</i>	<i>8,532</i>	<i>9,517</i>	<i>9,809</i>	<i>292</i>	<i>3.1%</i>
<i>G Mathematical sciences and informatics</i>	<i>13,620</i>	<i>9,912</i>	<i>10,152</i>	<i>240</i>	<i>2.4%</i>
<i>H/J Engineering and technology</i>	<i>9,830</i>	<i>11,273</i>	<i>12,164</i>	<i>891</i>	<i>7.9%</i>
K Architecture, building and planning	2,365	3,674	3,303	-371	-10.1%
L/M Social studies	21,310	21,371	22,240	869	4.1%
N Business and administrative studies	19,779	20,799	22,131	1,332	6.4%
P Mass communications and documentation	5,656	3,613	4,006	393	10.9%
<i>Q/R/T Languages and related disciplines</i>	<i>8,495</i>	<i>9,728</i>	<i>9,837</i>	<i>109</i>	<i>1.1%</i>
V Humanities	5,763	7,786	8,250	464	6.0%
W Creative arts	17,978	23,722	25,520	1,798	7.6%
X Education	6,692	6,825	7,356	531	7.8%
Y Combined arts	3,010	4,473	4,837	364	8.1%
<i>Y Combined sciences</i>	<i>3,619</i>	<i>3,429</i>	<i>3,711</i>	<i>282</i>	<i>8.2%</i>
Y Combined social studies	2,868	2,326	2,460	134	5.8%
Y Science combined with social studies or arts	3,530	6,613	6,434	-179	-2.7%
Y Social studies combined with arts	4,854	4,386	4,677	291	6.6%
Z Other general and combined studies	564	1,280	1,802	522	40.8%
Strategic Subjects Total	53,423	59,897	63,143	3,246	5.4%
Total	162,932	191,846	204,084	12,238	6.4%

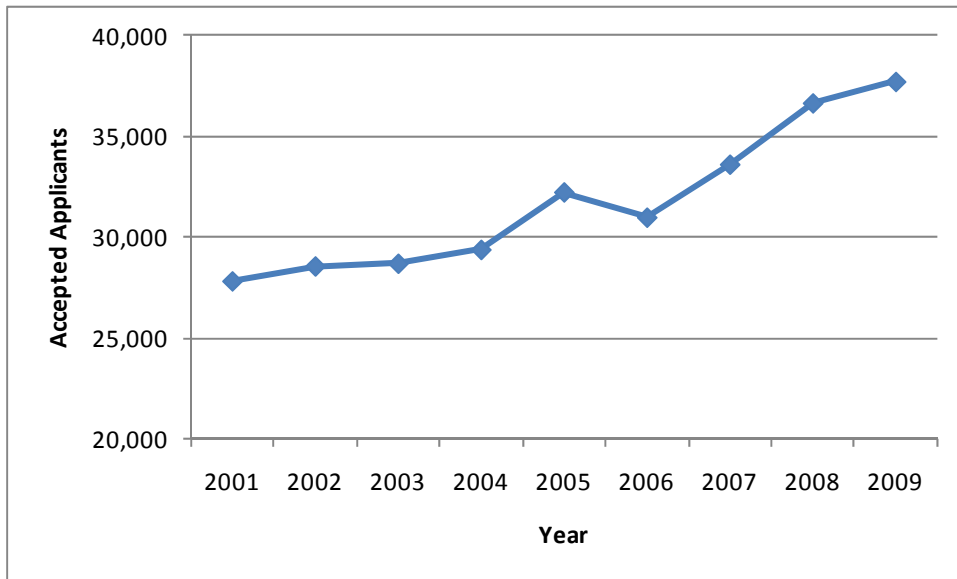
Source: UCAS

Note: Subjects designated as strategically important are indicated in italics

2.2 Accepted HE applications

The number of accepted HE applications is an indicator of student volumes and the capacity of HEIs to accommodate those volumes. HEIs in the South West accepted a total of 37,729 applications in 2009, an increase of 36% since 2001 and up 2.9% from the previous year. Figure 2 below shows that – apart from between 2005 and 2006 - there has been year-on-year growth in the number of accepted applications, but that growth has been strongest between 2006 and 2009.

Figure 2: Accepted HE applications in the South West, 2001-2009



Source: UCAS

Table 3 shows that the trend in accepted applications is similar to the total number of applications made, with the majority of HEIs seeing a significant increase in numbers between 2001 and 2009. In the last year, however, some HEIs have seen a slight drop in accepted applications, such as Bristol, Plymouth, the Royal Agricultural College and UCP Marjon, while others such as Bournemouth, UWE and Bath Spa have continued to grow strongly.

Table 3: Accepted HE applications in the South West by HEI, 2001-2008

Institution	2001	2008	2009	Change 2008-2009	% change 2008-2009
Bath Spa University College	1,258	1,932	2,071	139	7.2%
Bournemouth University	3,036	4,118	4,541	423	10.3%
Dartington College of Arts (now known as University College Falmouth inc Dartington College of Arts)	168	140	164	24	17.1%
University College Falmouth Incorporating Dartington College of Arts	549	913	1,015	102	11.2%
UCP Marjon	643	644	637	-7	-1.1%
Royal Agricultural College	136	331	280	-51	-15.4%
The Arts Institute at Bournemouth	351	975	888	-87	-8.9%
The University of Gloucestershire	2,337	2,369	2,427	58	2.4%
University of Bath	2,307	2,836	2,906	70	2.5%
University of Bristol	3,181	3,735	3,523	-212	-5.7%
University of Exeter	2,660	3,923	4,096	173	4.4%
University of Plymouth	4,081	5,239	5,124	-115	-2.2%
University of the West of England, Bristol	5,175	6,887	7,262	375	5.4%
FE Colleges	1,920	2,354	2,506	152	6.5%
Other*	0	266	289	23	8.6%
HEI Total	25,882	34,042	34,934	892	2.6%
Total	27,802	36,662	37,729	1,067	2.9%

Source: UCAS

Note: * The Peninsula Medical School was established as a partnership between the Universities of Exeter and Plymouth and the NHS in Devon and Cornwall on 1 August 2000. The first intake of 130 undergraduate students commenced their studies on 30 September 2002.

2.2.1 Accepted applications by age

There was strong growth in accepted applications across all age groups between 2001 and 2009 (see Table 4 below). Whilst, as expected, most applications came from 18 year olds, proportionally the largest increases were from applicants between the ages of 22 and 29.

Table 4: Accepted applications by age in South West institutions, 2001 to 2009

Age	2001	2007	2008	2009	% change 2001-2009	% change 2008-2009
17 and under	201	231	247	267	32.8%	8.1%
18 yrs	13,195	16,203	16,983	17,400	31.9%	2.5%
19 yrs	6,580	8,143	8,802	9,049	37.5%	2.8%
20 yrs	2,322	2,616	3,378	3,236	39.4%	-4.2%
21 yrs	1,115	1,315	1,492	1,618	45.1%	8.4%
22 yrs	651	843	957	986	51.5%	3.0%
23 yrs	462	545	657	711	53.9%	8.2%
24 yrs	344	449	475	502	45.9%	5.7%
25 to 29	1,056	1,256	1,508	1,561	47.8%	3.5%
30 to 39	1,234	1,204	1,277	1,434	16.2%	12.3%
40 and over	642	808	886	965	50.3%	8.9%
Total	27,802	33,613	36,662	37,729	35.7%	2.9%

Source: UCAS

In the last year, the number of accepted applications from the over 30s has increased the most (by 12.3%), while applications from 20 year olds have dropped by 4.2% in the same period.

2.2.2 Accepted applications by subject

Table 5 gives a subject breakdown of accepted applications. It shows that, in the last year, the biggest growth in accepted applications was in Humanities (23.8%), and in Subjects allied to medicine (9.4%). The only subjects to see a fall in accepted applications were Architecture, building and planning (-10%), Education (-7.2%) and Social studies (-2.0%).

Most strategic subjects showed reasonable growth, with the increase in Mathematical sciences and informatics being particularly high, reversing the longer-term trend in those subjects. The number of accepted applications in languages has remained similar to 2008 figures.

Table 5: Accepted HE applications in the South West by subject, 2001-2009

Subject	2001	2008	2009	Change 2008-09	% change 2008-09
A Medicine/Dentistry	212	602	607	5	0.8%
B Subjects allied to medicine	1,580	2,962	3,239	277	9.4%
<i>C Biological sciences</i>	<i>1,420</i>	<i>3,020</i>	<i>3,142</i>	<i>122</i>	<i>4.0%</i>
D Agriculture and related subjects	739	811	823	12	1.5%
<i>F Physical sciences</i>	<i>1,552</i>	<i>1,764</i>	<i>1,783</i>	<i>19</i>	<i>1.1%</i>
<i>G Mathematical sciences and informatics</i>	<i>2,522</i>	<i>1,977</i>	<i>2,161</i>	<i>184</i>	<i>9.3%</i>
<i>H/J Engineering and technology</i>	<i>1,615</i>	<i>2,005</i>	<i>2,053</i>	<i>48</i>	<i>2.4%</i>
K Architecture, building and planning	476	830	747	-83	-10.0%
L/M Social studies	3,258	3,816	3,739	-77	-2.0%
N Business and administrative studies	3,614	4,243	4,408	165	3.9%
P Mass communications and documentation	899	736	763	27	3.7%
<i>Q/R/T Languages and related disciplines</i>	<i>1,279</i>	<i>1,447</i>	<i>1,448</i>	<i>1</i>	<i>0.1%</i>
V Humanities	709	1,040	1,288	248	23.8%
W Creative arts	3,580	5,156	5,313	157	3.0%
X Education	1,222	1,808	1,677	-131	-7.2%
Y Combined arts	444	741	818	77	10.4%
<i>Y Combined sciences</i>	<i>646</i>	<i>760</i>	<i>775</i>	<i>15</i>	<i>2.0%</i>
Y Combined social studies	309	402	322	-80	-19.9%
Y Science combined with social studies or arts	813	1,366	1,379	13	1.0%
Y Social studies combined with arts	808	891	897	6	0.7%
Z Other general and combined studies	105	285	347	62	21.8%
Strategic Subjects Total	9,773	10,973	11,362	389	3.5%
Total	27,802	36,662	37,729	1,067	2.9%

Source: UCAS

Note: Subjects designated as strategically important are indicated in italics

2.3 Trends in student numbers

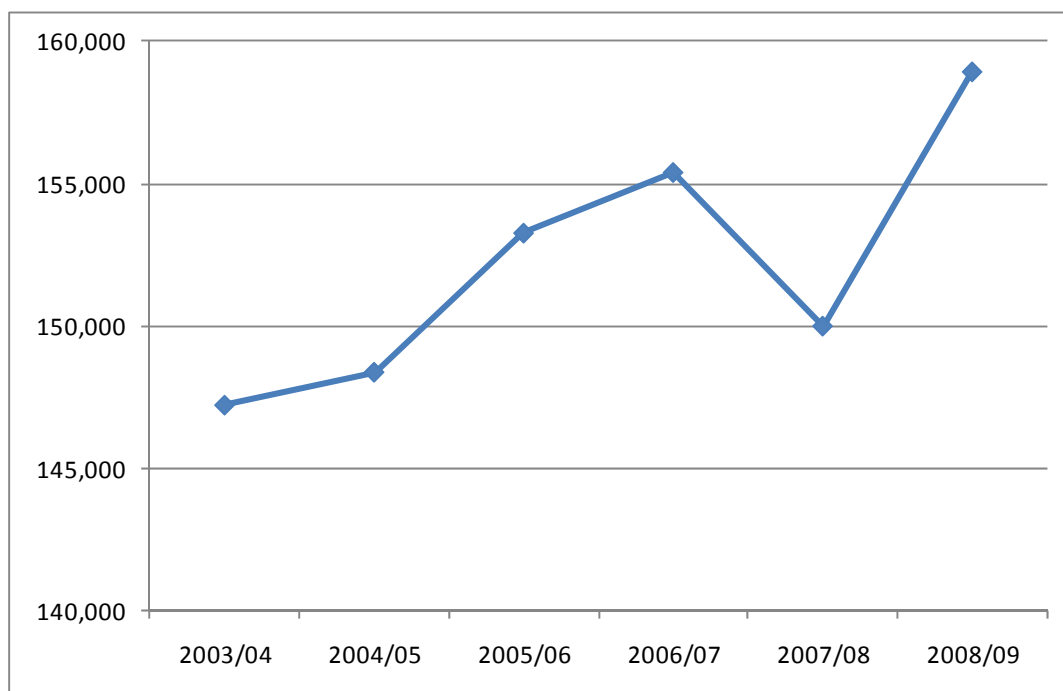
Although indicative of HE participation, the number of accepted applications is not an exact match to actual student numbers, as accepted applicants may never take up the places offered for a variety of reasons. Data from HESA allows analysis of actual student numbers, based on returns from the HEIs themselves¹.

In 2008/09, there were a total of 158,900 students at HEIs (not including FE students) across the South West. This represented an increase of around 8,900 (5.9%) since 2007/08, and a rise of around 11,700 (7.9%) since 2003/04.

¹ **Note:** HESA data does not show HE student numbers at FE colleges, so should not be compared directly with the UCAS data on applications to HEIs.

As Figure 3 shows, there was a fall in 2007/08 of almost 6,000 students in the region. At first glance, this seems an alarming and sudden fall, but it is important to understand this data in a policy context. The withdrawal of funding for students with equivalent or lower qualifications (ELQs) was a national policy introduced in 2008, which particularly affected those institutions which offered continuing education courses and those students studying part-time for a second degree. In the South West, Bristol, Plymouth, Exeter and UWE were particularly affected with reductions in HEFCE grant of over £1m each, which was translated into a drop in student numbers. These issues are examined in more detail in section 2.3.2.

Figure 3: Total HE students at South West HEIs, 2003/04 to 2008/09



Source: HESA

In addition to students studying at HEIs in the South West, in 2007/08, there were also 13,745 HE students taught at FE colleges in the region, and 21,635 students who were domiciled in the region and were studying via distance learning - primarily through the Open University².

2.3.1 Characteristics of students

Table 6 shows that almost four-fifths of HE students are studying at undergraduate level. This percentage has risen over the last two years due to a continuing rise in numbers of undergraduate students, while there was a significant drop in the number of postgraduates in 2007/08. This has been in large part due to strategic funding decisions by some of the larger HEIs in the region e.g. Bristol and Plymouth, in response to national policy aimed at redistributing public funding to pay for more new entrants to HE. With a high proportion of postgraduates studying on a part-time basis, this has had a significant effect on overall numbers, but actually equated to just over 1,000 FTEs, or a 5% fall.

² Source: HEFCE SW Regional Profile.

Table 6: Undergraduate & postgraduate student numbers, 2003/04 - 2008/09

	Undergraduate (No.)	Postgraduate (No.)	Undergraduate (%)	Postgraduate (%)
2003/04	112,660	34,575	76.5%	23.5%
2004/05	112,185	36,205	75.6%	24.4%
2005/06	116,210	37,030	75.8%	24.2%
2006/07	117,335	38,040	75.5%	24.5%
2007/08	118,485	31,510	79.0%	21.0%
2008/09	124,140	34,735	78.1%	21.9%
Change	11,480	160	1.6%	-1.6%
% change	10.2%	0.4%	-	-

Source: HESA

Table 7 shows there is a significantly higher proportion of HE students who are female, and that this proportion has not shifted significantly in recent years. However, this does not mean a decline in the number of male students, rather just that the number of female students has increased at a faster rate.

Table 7: Student numbers by gender, 2003/04 - 2008/09

	Male (No.)	Female (No.)	Male (%)	Female (%)
2003/04	62,775	84,445	42.6%	57.4%
2004/05	63,425	84,950	42.7%	57.3%
2005/06	65,685	87,570	42.9%	57.1%
2006/07	66,900	88,480	43.1%	56.9%
2007/08	64,365	85,625	42.9%	57.1%
2008/09	68,880	90,020	43.3%	56.7%
Change	6,105	5,575	0.7%	-0.7%
% change	9.7%	6.6%	-	-

Source: HESA

Table 8 shows that, until 2007/08, there had been a fairly consistent split between the number of full and part-time students, with around two-thirds of HE students studying full-time. However, due to the withdrawal of ELQ funding referred to above from 2007/08, the number of part-time students fell by around 9,500 in that year, while the number of full-time students has continued to grow.

Table 8: Full and Part-time Student Numbers, 2003/04 - 2008/09

	Full-time (No.)	Part-time (No.)	Full-time (%)	Part-time (%)
2003/04	97,490	49,720	66.2%	33.8%
2004/05	98,755	49,630	66.6%	33.4%
2005/06	102,895	50,345	67.1%	32.9%
2006/07	104,700	50,670	67.4%	32.6%
2007/08	108,865	41,145	72.6%	27.4%
2008/09	115,175	43,730	72.5%	27.5%
Change	17,685	-5,990	6.3%	-6.3%
% change	18.1%	-12.0%	-	-

Source: HESA

Table 9 shows that there has been an increase in the proportion of overseas students in HEIs in the South West. Although almost 90% of students are UK citizens, the number of overseas students increased by more than 23% between 2003/04 and 2008/09, and as a proportion of the total, overseas students now make up almost 12% of the student population, compared with just over 10% in 2003/04.

Table 9: UK and Overseas Student Numbers, 2003/04 - 2008/09

	UK (No.)	Overseas (No.)	UK (%)	Overseas (%)
2003/04	131,860	15,355	89.6%	10.4%
2004/05	132,275	16,115	89.1%	10.9%
2005/06	135,690	17,545	88.6%	11.4%
2006/07	136,970	18,415	88.1%	11.9%
2007/08	133,345	16,650	88.9%	11.1%
2008/09	139,960	18,945	88.1%	11.9%
Change	8,100	3,590	-1.5%	1.5%
% change	6.1%	23.4%	-	-

Source: HESA

2.3.2 Students numbers by HEI

Table 10 shows the number of HE students by individual institution. The majority of institutions have experienced an increase in student numbers in recent years, although numbers at some have fallen i.e. at Bath, Bristol, Gloucestershire and UCP Marjon - driven primarily by the ELQ funding changes, which have affected those institutions with higher levels of part-time students (at both undergraduate and postgraduate level).

By far the biggest increase in numbers was at UWE, with significant growth at Plymouth Bournemouth and Bath Spa. Proportionally, however, the biggest increases were in smaller institutions, such as the Arts Institute at Bournemouth (almost 75% growth since 2003/04), Bath Spa (40%) and University College Falmouth (28%).

Table 10: Student numbers by South West HEI, 2003/04 - 2008/09

Institution	2003/04	2008/09	Change	% change
Bath Spa University College	5,825	8,160	2,335	40.1%
The University of Bath	13,855	13,380	-475	-3.4%
The Arts Institute at Bournemouth	1,320	2,295	975	73.9%
Bournemouth University	15,880	17,965	2,085	13.1%
The University of Bristol	22,705	21,000	-1,705	-7.5%
The University of Exeter	14,130	16,195	2,065	14.6%
University College Falmouth*	2,365	3,030	665	28.1%
University of Gloucestershire	9,450	9,255	-195	-2.1%
UCP Marjon	5,975	4,080	-1,895	-31.7%
The University of Plymouth	28,420	30,930	2,510	8.8%
Royal Agricultural College	775	970	195	25.2%
University of the West of England, Bristol	26,520	31,645	5,125	19.3%
South West	147,220	158,905	11,685	7.9%

Source: HESA. * includes Dartington College of Arts

2.4 The Widening Participation agenda

2.4.1 Aimhigher South West

Aimhigher in the Southwest is a programme of activities to raise awareness, aspirations, and achievement amongst young people who have the potential to benefit from attending HE but who might otherwise miss out on the opportunity to do so because they come from social groups that are under-represented in HE.

Aimhigher in the South West is currently made up of three autonomous area partnerships:

- Aimhigher West – covering the West of England, Gloucestershire, Swindon and Wiltshire and North Somerset;
- Aimhigher Peninsula – covering the peninsula of Cornwall, Devon and West Somerset;
- Aimhigher in LIFE – covering Bournemouth, Dorset and Poole, and South Somerset.

On 25 November 2010, speaking at a Universities UK conference, David Willetts, the Universities and Science Minister, announced that funding for the Aimhigher programme would cease in 2011. In a statement, the Department for Business, Innovation and Skills stated that the Government would be working to establish a new “framework” for widening participation, which will place more responsibility on universities. According to the Department, Aimhigher received £136 million in 2004, but its annual funding is currently £78 million.

In 2009/10, a total of 87,568 people across the South West benefited directly from Aimhigher activities, taking the total number of beneficiaries since 2003 to over half a million people³. In the Peninsula area, 45% of Aimhigher participants who have reached the age of 20 are in HE (compared with a regional average of 29%), and there was growth of 57.8% in target school and college UCAS acceptances between 2003 and 2009⁴.

The data analysed so far has shown that there has clearly been a significant increase in full-time participation across the South West, and the next section will focus on whether participation has widened. The following measures are used for this:

- the percentage of entrants who attended a school or college in the state sector;
- the percentage of entrants who were returned with National Statistics Socio-economic Classification (NS-SEC) categories 4 to 7;
- the percentage of entrants whose home area (as denoted by their postcode) is known to have a low proportion of 18 and 19 year-olds in HE.

This participation data is available by individual institution from HESA, which is published as part of the series of performance indicators for HEIs.

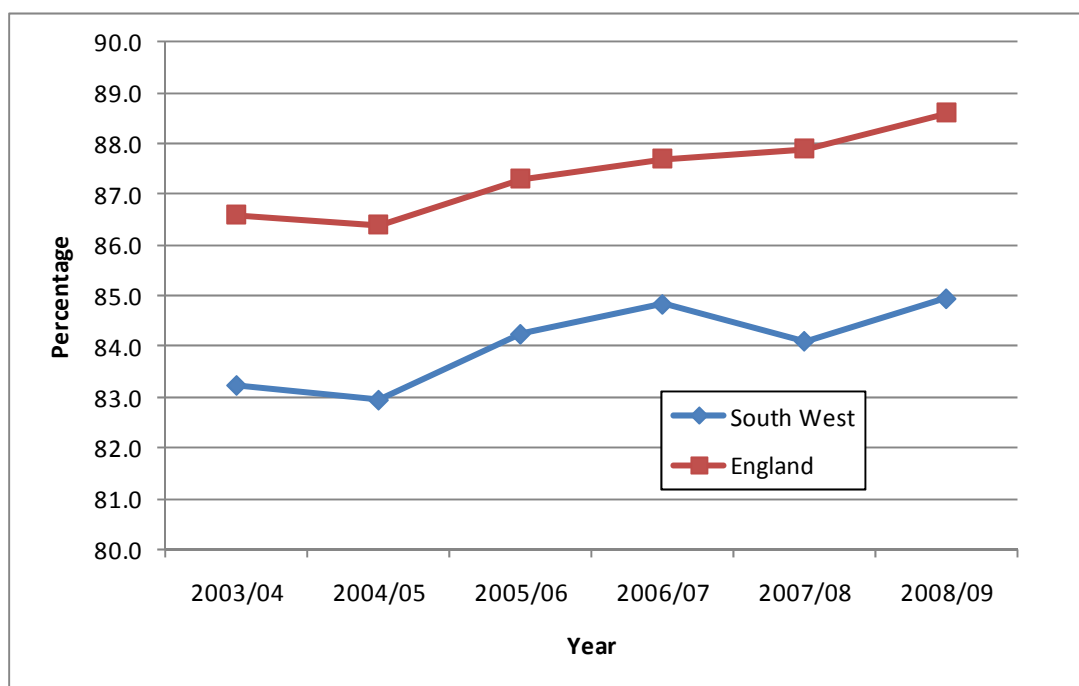
2.4.2 Participation from state sector schools/colleges

Figure 4 shows that the percentage of students from state schools has gradually been rising nationally year on year since 2004/05. The South West had been following the national trend (albeit at a lower level of state sector participation) until 2007/08, when the percentage fell back slightly, before recovering in 2008/09 to 84.9%.

³ Aimhigher South West, Aimhigher Works! 2009/10

⁴ Aimhigher Peninsula Factsheet 2009/10

Figure 4: Percentage of HE students from state schools/colleges, South West vs England, 2003/04 – 2008/09



Source: HESA Performance Indicators

Table 11 reveals a wide variation between individual institutions in terms of the proportion of students from the state sector. While many have levels well in excess of 90%, there are four institutions where the levels are significantly lower, namely:

- Royal Agricultural College 41.8%
- University of Bristol 60.0%
- The University of Exeter 71.0%
- The University of Bath 76.8%

All four of these HEIs with the lowest rates have actually seen a decline in the level of state sector participation since 2003/04.

Table 11: Percentage of young HE students from state schools/colleges, South West HEIs, 2003/04 – 2008/09

	2003/04	2007/08	2008/09	% Change 2003/04-2008/09	% Change 2007/08-2008/09
Bath Spa University	92.5	95.2	95.3	2.8	0.1
The University of Bath	77.4	77.8	76.8	-0.6	-1.0
The Arts Institute at Bournemouth	99.3	97.3	97.2	-2.1	-0.1
Bournemouth University	93.8	93.1	95.2	1.4	2.1
The University of Bristol	65.2	61.5	60.0	-5.2	-1.5
The University of Exeter	71.4	71.3	71.0	-0.4	-0.3
University College Falmouth	93.3	97.3	97.4	4.1	0.1
University of Gloucestershire	95.2	94.1	95.4	0.2	1.3
UCP Marjon	96.3	98.0	100.0	3.7	2.0
The University of Plymouth	92.9	95.1	95.4	2.5	0.3
Royal Agricultural College	53.0	42.5	41.8	-11.2	-0.7
UWE, Bristol	87.3	89.2	88.8	1.5	-0.4
South West	83.2	84.1	84.9	1.7	0.8
Total England	86.6	87.9	88.6	2.0	0.7

Source: HESA Performance Indicators

Note: Data includes young full-time undergraduate entrants only

2.4.3 Participation from target socio-economic groups

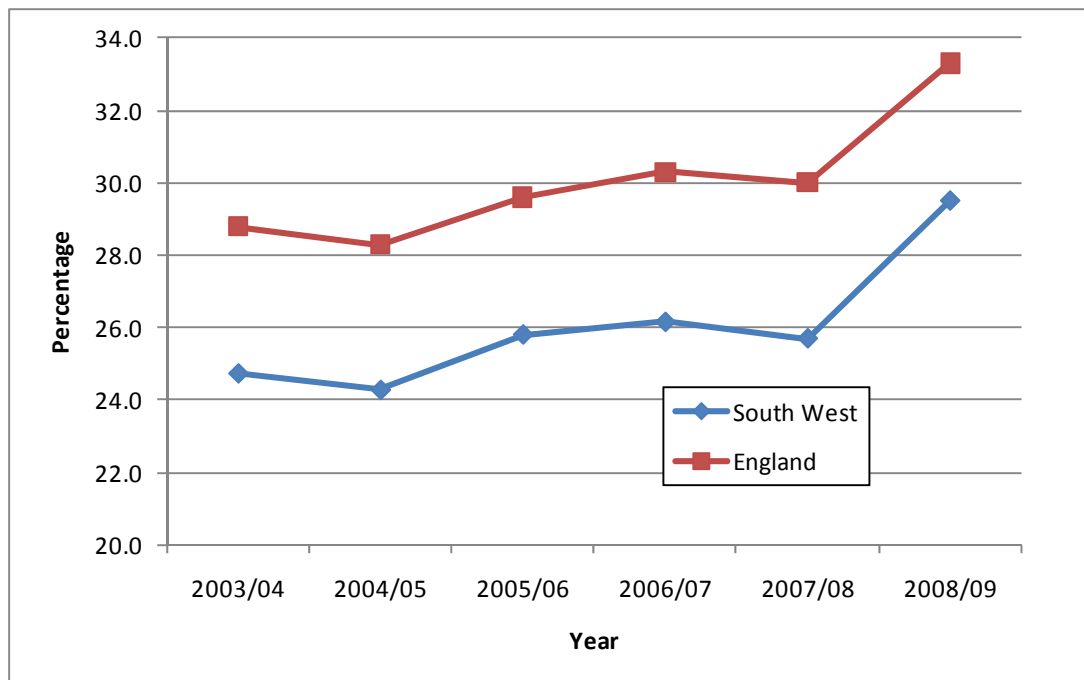
The information used by HESA on socio-economic classification is taken from the National Statistics Socio-Economic Classification (NS-SEC). The classifications used are:

1. Higher managerial and professional occupations
2. Lower managerial and professional occupations
3. Intermediate occupations
4. Small employers and own account workers
5. Lower supervisory and technical occupations
6. Semi-routine occupations
7. Routine occupations

The performance indicator is the proportion of students from NS-SEC classes 4 to 7 out of those from NS-SEC classes 1 to 7. NS-SEC class 8, long-term unemployed or never worked, has been included with the 'unknown' classification for the purposes of the performance indicators.

Figure 5 shows that the proportion of students in groups 4 to 7 has risen slightly in recent years, although growth appears to have halted in 2007/08. The South West has closely followed the national trend in this time, at a slightly lower level than nationally.

Figure 5: Percentage of HE students from target socio-economic groups, South West vs England, 2003/04 – 2008/09



Source: HESA Performance Indicators

Table 12 shows that, as with state school participation, the proportion of students from socio-economic groups 4-7 is lower in the South West compared with the national average in 2008/09. Although the 29.5% of students in this group is an increase from 2003/04, the sharp increase in the last year (both regional and nationally) has been at least partly driven by a slight change in the way HESA collects data on socio-economic groups, which has caused the numbers of those in classes 4 to 7 and 'unknown' to rise.

Table 12: Participation of young people from target socio-economic groups in higher education 2003/04 to 2008/09

	2003/04	2007/08	2008/09	Change 2003/04-2008/09	Change 2007/08-2008/09
Bath Spa University	30.6	30.4	34.9	4.3	4.5
The University of Bath	20.1	20.1	20.1	0.0	0.0
The Arts Institute at Bournemouth	23.0	31.2	33.0	10.0	1.8
Bournemouth University	29.0	29.2	32.6	3.6	3.4
The University of Bristol	14.1	13.9	14.2	0.1	0.3
The University of Exeter	16.6	17.6	20.8	4.2	3.2
University College Falmouth	30.9	30.8	31.6	0.7	0.8
University of Gloucestershire	30.2	31.2	35.7	5.5	4.5
UCP Marjon	38.1	38.3	51.2	13.1	12.9
The University of Plymouth	30.4	33.7	37.5	7.1	3.8
Royal Agricultural College	38.3	34.4	39.7	1.4	5.3
UWE, Bristol	28.2	28.2	34.5	6.3	6.3
South West	24.7	25.7	29.5	4.8	3.8
England	28.8	30.0	33.3	4.5	3.3

Source: HESA Performance Indicators

Note: Data includes young full-time undergraduate entrants only

2.4.4 Participation from low participation neighbourhoods

The definition used by HESA for this indicator is based on previous research work carried out into the rates of participation in HE of young people. A new method for producing the low participation neighbourhoods has been used from 2006/07 onwards and it is not comparable with the old (Super Profiles) low participation data published previously.

To define low participation neighbourhoods, HESA divided England into five quintile groups of areas ordered from '1' (those wards with the lowest participation) to '5' (those wards with the highest participation), each representing 20% of the UK's young student cohort. Students have been allocated to the neighbourhoods on the basis of their postcode. Those students whose postcode falls within wards with the lowest participation are denoted as being from a low participation neighbourhood.

Young people

Table 13 shows the number of young people from low participation neighbourhoods participating in HE at South West HEIs. It shows that 7.8% of young full-time HE students were from low participation neighbourhoods in 2008/09 (2,005 people). This is lower than the national average of 10.6%, and according to HEFCE's profile of HE in the region, the South West has 'one of the lowest proportions of young full-time first degree entrants from low participation neighbourhoods'.

Table 13 also shows that this proportion has grown slightly in the South West in the last year, although less than nationally. By individual institution, there is no clear pattern, with

some HEIs increasing the proportion of students from low participation neighbourhoods, and others experiencing a fall.

Table 13: Participation of young people from 'low participation neighbourhoods in HE 2006/07 to 2007/08

	2006/07	2007/08	2008/09	Change 2006/07-2008/09
Bath Spa University	10.4	9.2	8.9	-1.5
The University of Bath	4.6	5.0	5.2	0.6
The Arts Institute at Bournemouth	9.1	7.8	6.0	-3.1
Bournemouth University	8.2	8.6	8.3	0.1
The University of Bristol	3.5	3.2	3.4	-0.1
The University of Exeter	4.1	3.9	4.0	-0.1
University College Falmouth	8.5	8.9	9.9	1.4
University of Gloucestershire	8.0	8.4	8.7	0.7
UCP Marjon	11.4	13.0	13.7	2.3
The University of Plymouth	11.6	11.7	11.4	-0.2
Royal Agricultural College	3.1	0.5	2.4	-0.7
UWE, Bristol	9.6	9.1	9.4	-0.2
South West	7.9	7.6	7.8	0.0
England	10.1	10.3	10.6	0.5

Source: HESA Performance Indicators

Note: Data includes young full-time undergraduate entrants only

Mature Students

The indicator used for full-time mature entrants is the percentage - in a slightly adapted form - who come from 'low participation' neighbourhoods. Around a quarter of mature entrants to first degree courses at an HEI have previously obtained an HE qualification. When such students were originally in HE, they would have been included in the participation calculations at that time. Therefore, for mature students, the participation indicator has been taken as the percentage of entrants who have come from a low participation neighbourhood and do not have a previous HE qualification⁵.

Table 14 shows a slightly different short-term trend to that of young people. The proportion of mature undergraduates from low-participation neighbourhoods is closer to the national average, at 11.4% compared to 11.9%. There has been a slight dip in the proportion of mature students that are from low participation areas (from 11.5% in 2006/07), although the regional rate of decrease has been in line with the national trend.

⁵ Source: HESA.

Table 14: Participation of mature students from 'low participation neighbourhoods in HE 2006/07 to 2008/09

	2006/07	2007/08	2008/09	Change 2006/07-2008/09
Bath Spa University	16.8	14.5	11.4	-5.4
The University of Bath	9.7	10.6	8.4	-1.3
The Arts Institute at Bournemouth	4.1	2.9	7	2.9
Bournemouth University	7.9	11.2	8.5	0.6
The University of Bristol	8.9	10.7	7.5	-1.4
The University of Exeter	9.5	9.8	7.8	-1.7
University College Falmouth	4.7	9.5	10.4	5.7
University of Gloucestershire	11.2	10.9	10.4	-0.8
UCP Marjon	14.4	11.5	13.9	-0.5
The University of Plymouth	11.7	10.1	10.4	-1.3
Royal Agricultural College	0.0	0.0	2.6	2.6
UWE, Bristol	14.7	14.4	16.6	1.9
South West	11.5	11.4	11.4	-0.1
England	12.0	11.5	11.9	-0.1

Source: HESA Performance Indicators

Note: Data includes mature full-time undergraduate entrants with no previous HE & from low participation neighbourhoods

Note: Although the data above is presented for individual HEIs, this should not be interpreted as indicative of the performance of the institution on the measures. HESA also use location-adjusted benchmarks to take account of where an institution's students come from, as well as their subject and entry qualifications. When these indicators are taken into account, almost all of the South West HEIs' performance is similar to the HE sector as a whole.

2.5.1 Income to HEIs

Table 15 shows that the region's HEIs earned around £1,474 million in 2008/09. The amount of income varied massively between HEIs, with the largest university earning income of around £373 million, and the smallest just £15 million.

The majority of income (40%) came from grants from funding bodies, although this also varied between institutions, from as low as around a third in the Universities of Bath and Exeter, up to more than half in some of the other HEIs. Research grants and contracts made up 12.9% of the region's HE income, although not all HEIs received significant income in this way.

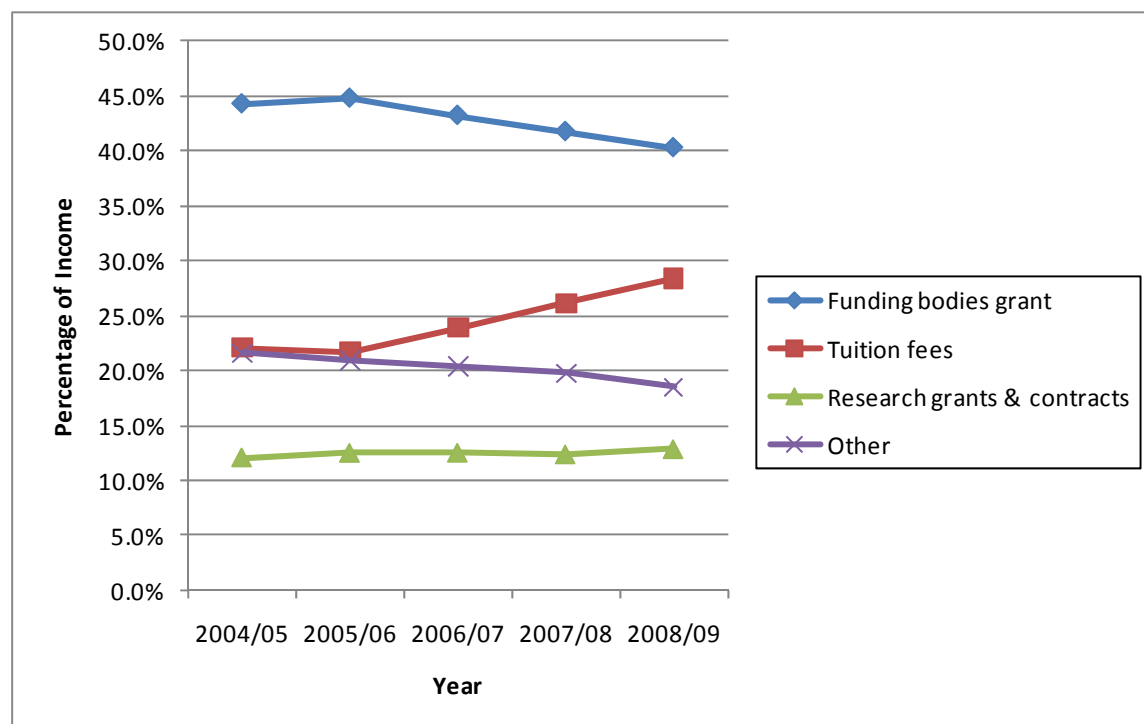
Table 15: Income to South West HEIs, 2008/09 (£ millions)

Institution	Funding bodies grant	Tuition fees	Research grants and contracts	Other	Total (£ millions)
Bath Spa University	54.3%	33.7%	0.3%	11.8%	50.4
The University of Bath	35.1%	28.5%	17.3%	19.0%	175.8
The Arts Institute at Bournemouth	58.0%	33.6%	0.2%	8.2%	22.8
Bournemouth University	42.0%	43.4%	2.3%	12.2%	106.1
The University of Bristol	36.7%	18.8%	27.0%	17.5%	373.4
The University of Exeter	33.3%	29.5%	16.4%	20.8%	203.2
University College Falmouth	50.1%	30.4%	0.1%	19.3%	31.0
University of Gloucestershire	46.3%	34.0%	1.6%	18.1%	67.4
UCP Marjon	47.9%	28.2%	0.2%	23.6%	23.4
The University of Plymouth	52.8%	30.5%	6.0%	10.6%	198.1
Royal Agricultural College	33.1%	22.2%	0.4%	44.3%	15.0
UWE, Bristol	35.7%	31.0%	4.5%	28.8%	207.0
South West	40.3%	28.4%	12.9%	18.5%	1,473.7

Source: HESA finance record 2008/09

Figure 6 shows a slight shift in the structure of HEIs' income in the South West over recent years. HEIs now receive a greater proportion of income from tuition fees than in 2004/05, while slightly less is received from funding bodies' grants. The proportions of income from research grants and other income have both remained fairly steady.

Figure 6: Income to South West HEIs, 2004/05-2008/09 (percentage)



Source: HESA finance record

The above graph might suggest that levels of grants provided by funding bodies are falling, but this is not the case. Table 16 shows that all areas of HEI income in the South West have increased significantly in the last four years. The shift in the structure of income has been caused by income from tuition fees rising by more than 85% in this time, compared with a 32% increase in grants from funding bodies.

Table 16: Income to South West HEIs, 2004/05-2008/09 (£ millions)

Year	Funding bodies grant	Tuition fees	Research grants and contracts	Other	Total
2004/05	450.2	224.6	122.8	219.4	1,017.0
2005/06	492.7	239.1	137.7	230.4	1,099.9
2006/07	522.2	288.9	151.3	245.9	1,208.2
2007/08	564.3	353.3	167.2	267.3	1,352.0
2008/09	593.3	417.9	189.6	272.8	1,473.7
% change 2004/05-2008/09	31.8%	86.1%	54.4%	24.4%	44.9%

Source: HESA finance record

The recent Browne Review of HE funding includes far reaching proposals to make HEIs more competitive. Their funding will become more dependent on levels of student demand, as the annual block grant from HEFCE will be reduced, while the cap on tuition fees will be raised, allowing institutions to charge more for courses. This will certainly have a dramatic effect on the structure of HEIs' income in future years.

2.6 Qualifications achieved

Table 17 shows that a total of 44,130 HE qualifications were achieved in the South West in 2008/09, a fall of 2.8% from the previous year but almost 19% higher than in 2003/04. Table 17 also shows that first degrees made up the majority of qualifications achieved, accounting for 56% of the regional total. Foundation degrees have been where the most short-term growth has occurred, while there has been a decline in the number of postgraduate and other undergraduate qualifications achieved.

Table 17: HE Qualifications achieved in the South West by type, 2003/04-2008/09

Type of Qualification	2003/04	2007/08	2008/09	% change 03/04 - 08/09	% change 07/08 - 08/09
Doctorate / Higher Degree	5,685	6,935	6,380	12.2%	-8.0%
Other Postgraduate	5,265	4,740	4,010	-23.8%	-15.4%
First degree	20,450	24,755	24,525	19.9%	-0.9%
Foundation degree	480	2,480	3,345	596.9%	34.9%
Other Undergraduate	5,240	6,485	5,870	12.0%	-9.5%
Total	37,120	45,395	44,130	18.9%	-2.8%

Source: HESA

Note: Columns may not tally due to HESA rounding

Table 18 shows the total number of HE qualifications by individual institution. As would be expected, the majority of qualifications come from the region's larger universities, all of which have seen growth in qualifications achieved. Just two HEIs - Gloucestershire and UCP Marjon - experienced a drop in qualifications achieved over the period from 2003/04 to 2008/09. In the last year, five HEIs have seen a fall in the number of qualifications achieved, partly due to the knock-on effect of the withdrawal of ELQ funding discussed above, which affected student numbers in 2007/08.

Table 18: HE Qualifications achieved in the South West by HEI, 2003/04-2008/09

Institution	2003/04	2007/08	2008/09	% change 03/04 - 08/09	% change 07/08 - 08/09
Bath Spa University	1,730	2,260	2,565	48.3%	13.5%
The University of Bath	3,060	3,785	3,815	24.7%	0.8%
The Arts Institute at Bournemouth	370	735	775	109.5%	5.4%
Bournemouth University	3,875	5,730	4,940	27.5%	-13.8%
The University of Bristol	4,805	5,510	5,640	17.4%	2.4%
The University of Exeter	4,225	4,780	5,465	29.3%	14.3%
University College Falmouth	560	990	905	29.3%	-8.6%
University of Gloucestershire	3,220	2,930	2,850	-11.5%	-2.7%
UCP Marjon	1,255	820	1,025	-18.3%	25.0%
The University of Plymouth	6,995	9,950	8,225	17.6%	-17.3%
Royal Agricultural College	275	345	325	18.2%	-5.8%
UWE, Bristol	6,610	7,560	7,600	15.0%	0.5%
South West	37,120	45,395	44,130	18.9%	-2.8%

Source: HESA

Note: Columns may not tally due to HESA rounding

2.6.1 Qualifications achieved by subject

Table 19 shows the achievement of HE qualifications by subject. It shows that the biggest increases since 2003/04 have been in Medicine & related, Biological sciences, Veterinary science, Architecture, building and planning and Social studies.

The majority of the strategically important subjects have seen an increase in qualifications achieved in recent years. The only exception was in Computer science, which has fallen by around a third since 2003/04. It is possible that these figures will improve further in years to come given the significant increase in applications for places on courses in strategically important subjects, as discussed in section 2.1.1. However this assumes demand for places will continue to rise in the face of the imminent changes to HE funding, which will place an additional burden of debt on students and may deter many from pursuing HE.

The only likely exception is Computer science, where demand for places appears to have fallen consistently in recent years.

Table 19: HE Qualifications achieved at South West HEIs by subject, 2003/04 – 2008/09

Subject	2003/04	2007/08	2008/09	% change 03/04 - 08/09	% change 07/08 - 08/09
Medicine & dentistry	365	610	635	74.0%	4.1%
Subjects allied to medicine	3,235	4,970	3,590	11.0%	-27.8%
<i>Biological sciences</i>	<i>2,350</i>	<i>3,590</i>	<i>3,565</i>	<i>51.7%</i>	<i>-0.7%</i>
Veterinary science	90	140	150	66.7%	7.1%
Agriculture & related subjects	825	700	585	-29.1%	-16.4%
<i>Physical sciences</i>	<i>1,605</i>	<i>1,860</i>	<i>1,835</i>	<i>14.3%</i>	<i>-1.3%</i>
<i>Mathematical sciences</i>	<i>530</i>	<i>600</i>	<i>725</i>	<i>36.8%</i>	<i>20.8%</i>
<i>Computer science</i>	<i>1,875</i>	<i>1,410</i>	<i>1,260</i>	<i>-32.8%</i>	<i>-10.6%</i>
<i>Engineering & technology</i>	<i>1,850</i>	<i>2,060</i>	<i>2,100</i>	<i>13.5%</i>	<i>1.9%</i>
Architecture, building & planning	745	1,240	1,290	73.2%	4.0%
Social studies	2,910	4,315	3,975	36.6%	-7.9%
Law	1,885	2,070	2,010	6.6%	-2.9%
Business and administrative studies	5,730	5,765	5,895	2.9%	2.3%
Mass communications & documentation	1,120	1,135	1,150	2.7%	1.3%
<i>Languages</i>	<i>1,770</i>	<i>2,195</i>	<i>2,235</i>	<i>26.3%</i>	<i>1.8%</i>
Historical and philosophical studies	1,460	1,620	1,550	6.2%	-4.3%
Creative arts and design	3,255	4,450	4,740	45.6%	6.5%
Education	5,140	6,485	6,615	28.7%	2.0%
Combined	400	190	245	-38.8%	28.9%
Strategic Subjects Total	9,980	11,715	11,720	17.4%	0.0%
Total all qualifications	37,140	45,405	44,150	18.9%	-2.8%

Source: HESA. Note - strategically important subjects are in italics.

2.7 Destinations of graduates

Table 20 shows that just under two-thirds (62%) of the region's graduates entered employment (on a full-time, part-time or voluntary basis) after graduating in 2008/09. A quarter went on to further study (or further study combined with employment), while 6.6% were unemployed. A further 4% were unavailable for employment. Although there has been significant concern and widespread media coverage of significantly worsening job prospects for graduates as a result of the recession, the drop in the proportion of graduates finding employment has been only 1.4 percentage points from the previous year and the unemployment rate has increased by just 0.2 percentage points. That said, this data provides no indication of the quality or level of the employment that graduates have taken.

Table 20: Destinations of graduates from South West HEIs, 2008/09

Institution	Total with known destination	Working	Further Study	Unemployed	Not available for employment	Other
Bath Spa University	1,710	59.4%	27.2%	7.9%	3.5%	2.0%
The University of Bath	2,405	56.8%	31.2%	7.9%	3.1%	1.0%
Arts Institute at Bournemouth	580	45.7%	47.4%	5.2%	1.7%	0.0%
Bournemouth University	3,180	65.3%	21.4%	7.9%	4.7%	0.8%
The University of Bristol	3,320	59.6%	28.0%	6.2%	5.0%	1.2%
The University of Exeter	2,860	57.3%	30.8%	7.0%	4.0%	0.9%
University College Falmouth	620	74.2%	10.5%	7.3%	6.5%	1.6%
University of Gloucestershire	1,655	66.2%	20.2%	8.5%	3.9%	1.2%
UCP Marjon	715	77.6%	14.0%	5.6%	1.4%	1.4%
The University of Plymouth	5,360	56.9%	31.7%	5.2%	5.0%	1.1%
Royal Agricultural College	220	59.1%	34.1%	2.3%	4.5%	0.0%
UWE, Bristol	5,310	69.4%	20.8%	5.8%	3.1%	0.8%
South West	27,935	62.0%	26.3%	6.6%	4.1%	1.1%

Source: HESA

Research by High Fliers on the graduate recruitment market in 2011 found that:

- The UK's leading employers were expecting to increase their graduate recruitment by 9.4% in 2011, following a rise of 12.6% in entry-level roles for university-leavers during 2010. Vacancies dropped by 17.8% in 2009 and 6.7% in 2008.
- Three-fifths of employers expected to recruit more graduates in 2011 whilst a quarter planned to maintain their intake at 2010 levels.
- Employers in thirteen of fourteen key industries and employment areas expected to recruit more graduates in 2011. However, recruitment targets at several public sector employers had already been reduced and further cuts were expected later in the year.
- Starting salaries at the UK's leading graduate employers in 2011 were expected to remain unchanged from 2010 levels – a median of £29,000⁶.

Although graduate recruitment prospects among the country's leading employers appear healthy, a survey of 16,000 final year university students (also conducted by High Fliers⁷) found that one in six would have reconsidered going to university if they had known how difficult it would be to secure a job once they graduated. It also found that just 36% felt they were likely to find a graduate job once their course was completed. Confidence in the graduate job market was at an all-time low, with 45% of university leavers describing prospects for new graduates as 'very limited'. Fewer than one in six finalists who applied for

⁶ Daily Telegraph (2010) Graduates 'preparing to take low-paid jobs', online article 27th May 2010, <http://www.telegraph.co.uk/education/educationnews/7766374/Graduates-preparing-to-take-low-paid-jobs.html>

⁷ Personnel Today (2010) Graduate employment confidence hits 15-year low, online article 27th May 2010 <http://www.personneltoday.com/articles/2010/05/27/55739/graduate-employment-confidence-hits-15-year-low.html>

graduate positions said they were 'very confident' of landing a definite job offer before graduation - even less than in 2009. And a third said they would have to accept any job they were offered. Graduate salary expectations have also fallen. Final-year job hunters expect to earn an average of £22,000 for their first job - 3.1% less than in 2008.

2.7.1 Retention/outflow of graduates

Having established that the majority of graduates enter employment, it is also possible to identify where graduates go for employment. Table 21 shows that, of the 18,780 graduates from South West HEIs in 2008/09 (UK domiciled undergraduates and postgraduates) entering employment, around 60% remain in the region. As might be expected given the concentration of UK jobs in London and the South East, these are the main areas that graduates leaving the region move to, accounting for a quarter of the region's graduates.

Table 21: Region of employment from those entering employment from South West HEIs, 2008/09

Region of Employment	Number	%
North East	65	0.3%
North West	260	1.4%
Yorkshire & the Humber	150	0.8%
East Midlands	330	1.8%
West Midlands	695	3.7%
East	635	3.4%
London	2,405	12.8%
South East	2,385	12.7%
South West	11,150	59.4%
Wales	445	2.4%
Scotland	110	0.6%
Northern Ireland	35	0.2%
Channel Islands & Isle of Man	115	0.6%
Total	18,780	100%

Source: HESA

2.7.2 Inflow of graduates into the region for employment

In terms of graduates (UK domiciled) who studied outside the South West but came here to work, these numbered just under 7,000 in total (including around 600 from the Open University). The main areas from which they came were the South East and Wales and, to a lesser extent, London (as shown in Table 22).

Table 22: Graduates employed in the South West by region of study, 2008/09

Region of HEI	Number	%
North East	170	0.9%
North West	500	2.8%
Yorkshire & the Humber	315	1.7%
East Midlands	510	2.8%
West Midlands	745	4.1%
East	340	1.9%
London	725	4.0%
South East	1,740	9.6%
South West	11,150	61.5%
The Open University	605	3.3%
Wales	1,150	6.3%
Scotland	165	0.9%
Northern Ireland	20	0.1%
Total	18,135	100%

Source: HESA

When the total inflows and outflows in Tables 21 and 22 are compared, it appears that the region has a net loss of around 500-600 graduates each year. The outflow of graduates is mainly towards London and the South East, in common with most other regions.

REFERENCES

Aim Higher (2010) **Aimhigher South West, Aimhigher Works! 2009/10**

Aim Higher (2010) **Aimhigher Peninsula Factsheet 2009/10**

Daily Telegraph (2010) Graduates 'preparing to take low-paid jobs', online article 27th May 2010, <http://www.telegraph.co.uk/education/educationnews/7766374/Graduates-preparing-to-take-low-paid-jobs.html>

Personnel Today (2010) Graduate employment confidence hits 15-year low, online article 27th May 2010 <http://www.personneltoday.com/articles/2010/05/27/55739/graduate-employment-confidence-hits-15-year-low.html>

Higher Education Funding Council for England (2010) **South West Regional Profile of Higher Education 2007/08**, HEFCE, June 2010
<http://www.hefce.ac.uk/regions/profiles/>

Higher Education Statistics Agency (2009) **Higher Education Information Database for Institutions (HEIDI)** www.heidi.ac.uk

High Fliers Research (2011) The Graduate Market in 2011 - Annual review of graduate vacancies & starting salaries at Britain's leading employers www.highfliers.co.uk

Lord Browne (2010) **Securing a sustainable future for higher education** - An independent review of higher education funding and student finance www.independent.gov.uk/browne-report

Personnel Today (2010) **Graduate employment confidence hits 15-year low**, online article 27th May 2010 <http://www.personneltoday.com/articles/2010/05/27/55739/graduate-employment-confidence-hits-15-year-low.html>

Reuters (2009) **College leavers face bleak employment prospects**, online article, Wed Apr 29, 2009 <http://uk.reuters.com/article/idUKLNE53S00D20090429>