

RET 19

Ymateb gan: Prifysgol Cymru

Response from: Universities Wales

About Universities Wales

Universities Wales represents the interests of universities in Wales. Our membership encompasses the Vice Chancellors of all the universities in Wales and the Open University in Wales. Our mission is to support a university education system which transforms lives through the work Welsh universities do with the people and places of Wales and the wider world.

Universities Wales welcomes the opportunity to respond to the Committee's inquiry.

Key messages

- Wales is experiencing some of the **most alarming post-16 participation challenges** we've seen in many years. There is clear, consistent and real evidence that fewer people in Wales are engaging with education or training beyond compulsory education.
- **There is a participation problem across the nation** – we have increasing numbers of those **not in any form of education or training**. [Careers Wales data](#) demonstrates that the proportion of school-leavers not pursuing full-time education post-16 (either at college or sixth form) is at its highest since 2013.
- This year **fewer people from Wales went to university than at any point in the past decade**. The gap in 18-year-old participation between Wales and the UK as a whole is also at its widest in recent history, creating a scenario where cohorts of young people are less well-qualified than their immediate predecessors, with Wales lagging behind the rest of the UK. This is despite Wales having the most generous package of student support.
- The pipeline for higher education is declining – **far too few young people in Wales are undertaking A Levels**. [In England, 47% of school leavers go on to study A Levels, compared to just 33% in Wales](#). Particularly in recent times,

sixth form A Level students are far more likely to enter higher education than those engaged with other routes. **Fewer 16-year-olds undertaking A Levels means fewer students moving into higher education and higher-skilled jobs.** There has also been a decline in BTEC students applying for university.

- **Long-standing generational inequality is being baked in** – a report by the [Wales Centre for Public Policy](#) shows that the correlation between socio-economic background and educational outcomes is stronger in Wales than elsewhere in the UK. **The gap in higher education participation between the most and least disadvantaged is wider in Wales than elsewhere in the UK.** Furthermore, parental qualifications have a direct bearing on their children's qualifications.

Why this matters – the value of higher education

- Individuals are **losing out on the [benefits of a university education](#)** – including a significant boost to salary, employment levels and a graduate's career prospects throughout life, with a generational impact.
- Studies show that [higher education is a driver of better physical and mental health](#), even after accounting for other biographical factors, such as socioeconomic background and gender. **The benefits of higher education are felt by the children of graduates too**, and these cross-generational benefits are estimated to be worth at least as much as the financial benefits of increased earnings.
- **By the age of 31, [graduates are earning 37% more than non-graduates](#)** with at least two A-levels. Data on both actual and projected lifetime earnings of recent graduates shows significant benefits relative to non-graduates, including non-graduates with similar prior educational attainment.
- **Wales will need more people with graduate level skills** to grapple with automation, maintain public services, grow Wales' economy and tackle issues such as climate change. [Research](#) has shown that more than **400,000 extra graduates will be needed in Wales by 2035** in order to respond to skills gaps and workforce challenges of the future.
- Wales is facing an **increasing skills gap** with the rest of the UK.

Recommendations

- **Welsh Government and Medr should improve the available dataset** on post-16 trajectories and destinations to inform policy interventions.

- **Welsh Government** should avoid setting targets in only one area of post-16 provision, which has a detrimental impact on the advice, guidance and the broad mix of qualifications promoted to learners.
- **Medr and Welsh Government should set a target for A level entries** in Wales to ensure that young people in Wales take full advantage of their potential, strengthening the pipeline for entry into higher education, in line with the rest of the UK.
- Welsh Government should **consider raising the compulsory school age** for full-time education or training to 18.
- **Pathways to university** – More effort needs to be made to allow and support learners to access university via a range of flexible pathways, and to develop the talent pipeline ensuring nobody is cut off from accessing higher-level qualifications.
- Targets should be set to **shrink the gap in university participation between the most and least disadvantaged**. Accordingly, the **Seren programme should be reviewed and refocused** to encourage and enable those from more disadvantaged socio-economic backgrounds, who are the least likely to apply for university, to do so.
- A target should be set to **increase the rate of participation in higher education** among Welsh-domiciled learners.
- The [Study in Wales](#) brand should be **deployed domestically** to encourage Welsh young people to study at Wales' universities.

Consultation questions

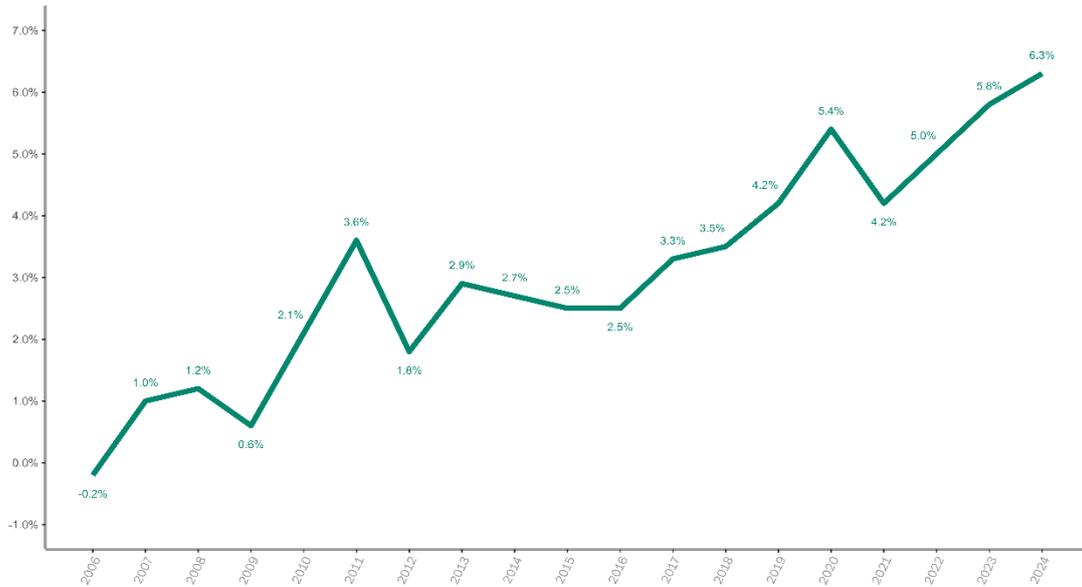
1. Quality of information given to learners about the full range of post-16 options (vocational and academic routes post 16, i.e. further education, sixth form, apprenticeships and training, and onward to higher education)
 - Quality and nature of information provided to learners within schools and those educated other than at school (EOTAS).
 - Quality and nature of information provided directly to learners by Careers Wales.

The data demonstrate that Wales is lagging behind the rest of the UK in terms of young people going to university.

UCAS [data](#) reveals that the **gap between participation in higher education in Wales and the UK average is now 6.3 percentage points, the largest gap on record.**

Percentage point difference in entry rates for 18-year-olds from Wales and UK (All)

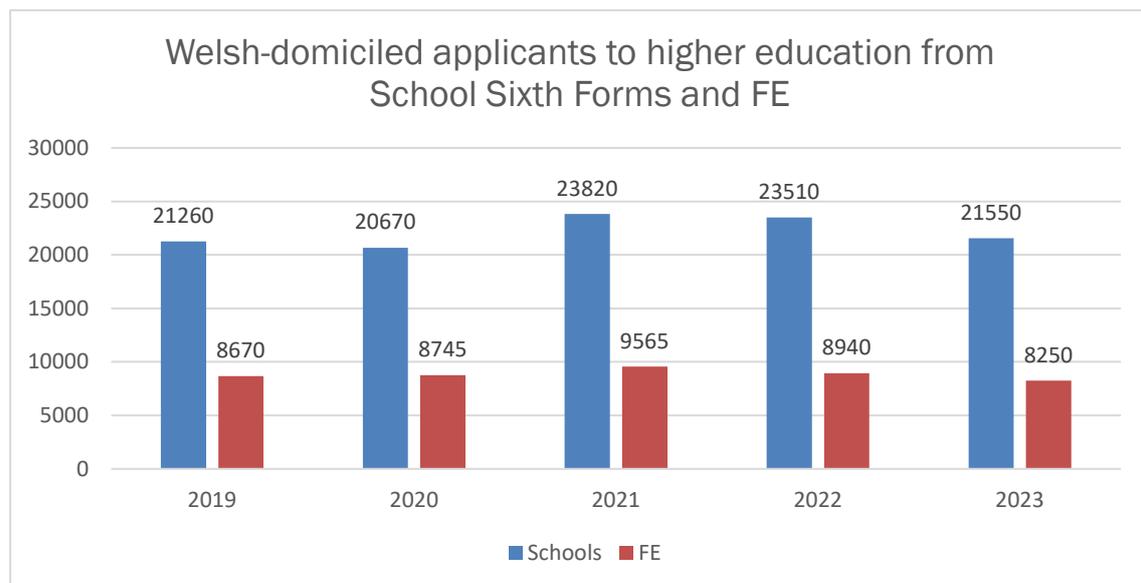
Entry rates for Welsh students were 6.3 percentage points lower than the UK average in 2024, the largest gap on record.



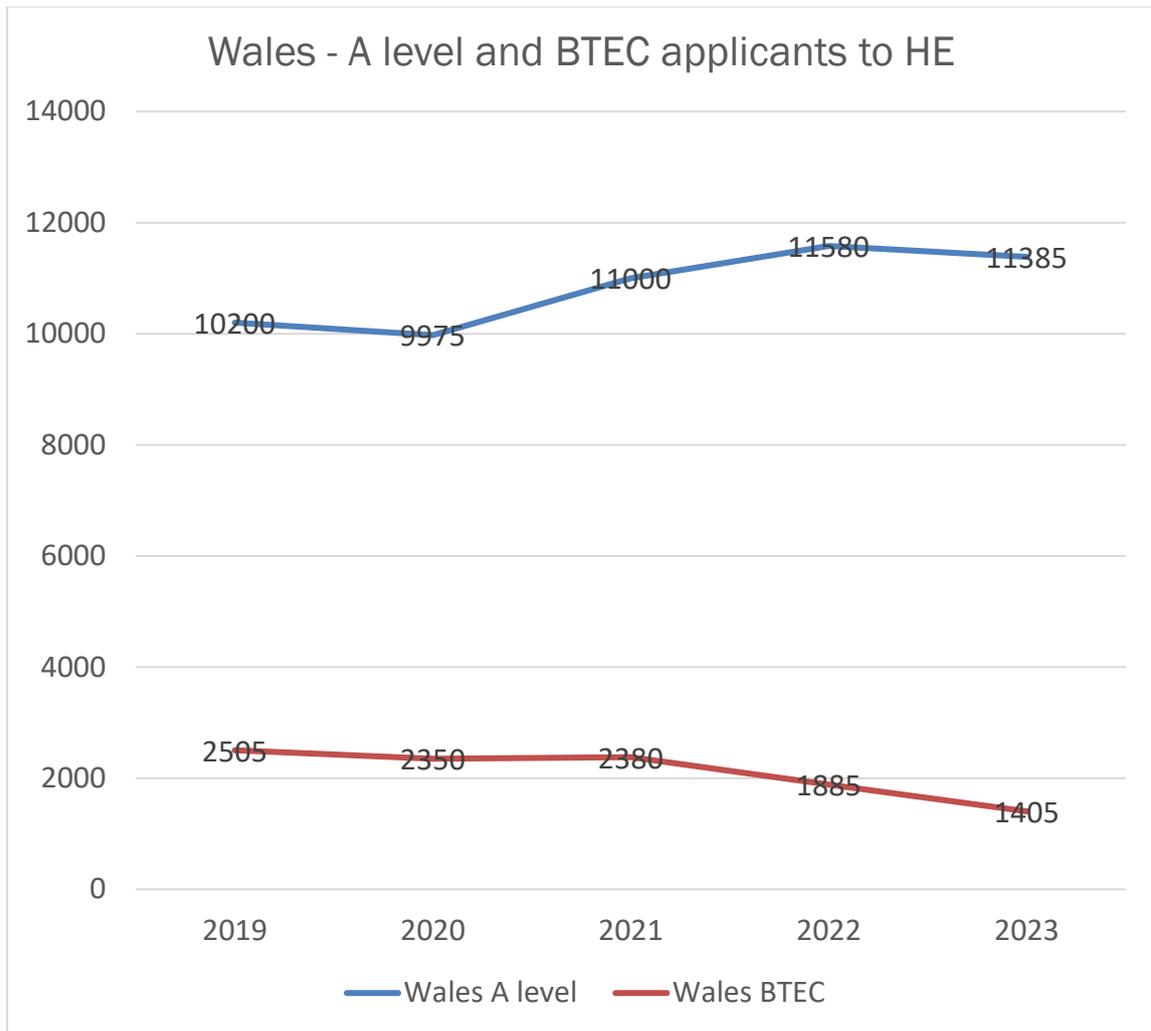
Source: UCAS 2024 End of Cycle data, December 2024

Fewer 16–18-year-olds are taking A Levels. A Levels are more commonly accessed in sixth forms (although in some areas of Wales these do not exist), while vocational courses are more often done via FE routes. In terms of the future of [Wales’ skilled workforce](#), many professions will continue to require A Levels as the accepted and expected route into higher education and professional qualifications. The decline in A Level participation is accompanied by a drop in students applying to university via BTECs.

Schools currently generate larger numbers of university applicants than FE. Research undertaken by Universities Wales using UCAS data on licence demonstrates the relationship between settings and qualification type in relation to accessing higher education.



Note: 2019 is considered to be the most suitable comparator to 2023, as academic years from 2020-2022 were impacted by Covid.



Universities readily accept BTEC qualifications for entry to relevant qualifications, they are particularly valued in the creative industries and other courses that entail some more practical elements such as nursing. It is therefore concerning that there has been a declining trend in Welsh applicants to university coming through the BTEC route.

Inequality is being baked in, with social background and availability of sixth forms seriously skewing where and how our young people study (or indeed whether they pursue education or training at all).

Given that Wales has the most generous package of student financial support in the UK but is lagging behind on participation, **it is vital to better understand the reasons why young people are not opting to go to university.**

It should therefore be part of Welsh Government's focus in addressing the participation challenge to seek to **understand the efficacy of independent advice and guidance** being provided, and to **improve the dataset** available to inform policy levers.

- **The extent to which further education colleges are able to engage directly with learners in schools.**

Universities Wales is not equipped to provide comment on how colleges are able to engage with school pupils. However, we will use this question to set out some of the ways in which universities engage with schools.

As part of their **widening access strategies and civic engagement**, universities in Wales cultivate relationships with local schools through visits and mentoring programmes. This can vary depending on the capacity and staff time.

For example, [The Children's University project](#) provides school pupils with the opportunity to learn in a rich range of contexts, experience new places, visit universities and attend their own graduation ceremonies.

The [Physics Mentoring](#) and [Modern and Foreign Languages Mentoring](#) programmes provide opportunities for undergraduate students to act as mentors to school pupils in these subject areas, providing support for learners who may not have had the confidence to study in this area and excellent opportunities for mentoring. This in turn can [increase aspiration among undergraduates](#) to consider teaching as a prospective career, and [increase aspiration among school pupils to apply for university](#). The Physics Mentoring project saw a [100% increase in participants declaring that they 'definitely will' take Physics A Level](#) in the 2022-23 academic year.

While programmes such as these are aimed at building ambition and awareness in school pupils that higher education is a viable and achievable future step for them, not all schools will have these links.

Feedback from universities suggests that, in some cases, it has become increasingly difficult for them to maintain direct contact with secondary pupils as their timetables have become more crowded in recent times, with increased pressures on exam revision and teacher workload making it harder to engage.

- **The extent to which learners in schools are made aware of the options available to them in school sixth forms and local further education colleges, and how closely schools engage with local colleges. Are there any conflicts of interest between sixth forms and further education colleges and is this more prevalent in some areas of Wales more than others?**

[Careers Wales data](#) demonstrate that the proportion of school-leavers not pursuing full-time education (either at college or sixth form) is at its highest since 2013.

Of those who do continue in education, [52% go into vocational learning programmes](#).

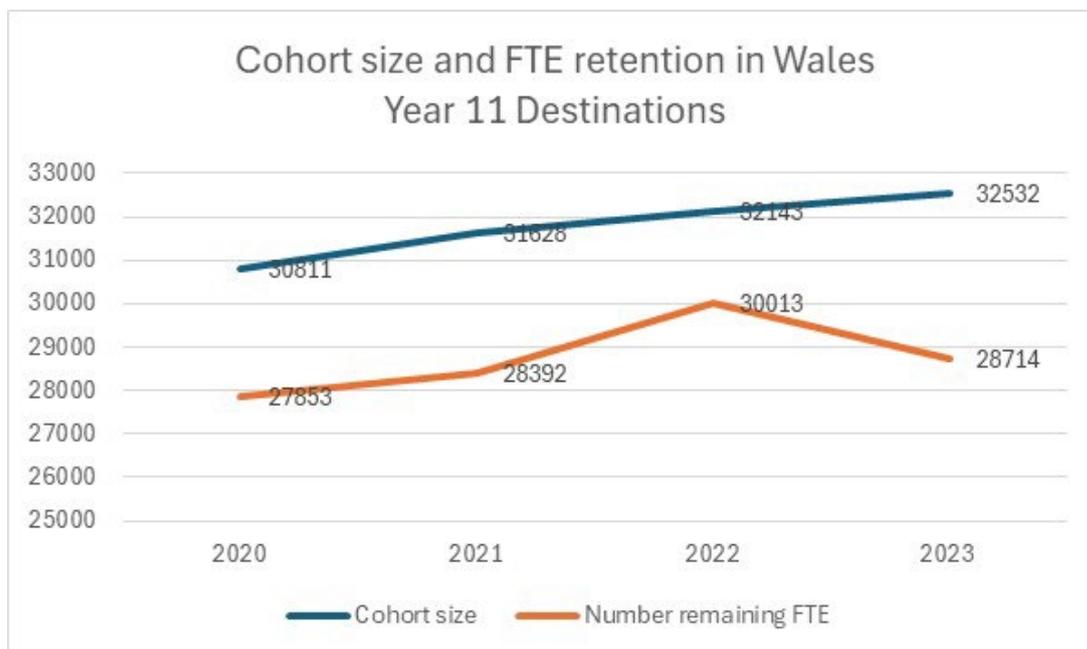
This may be linked to the attainment of Welsh learners at the age of 16. PISA scores indicate that Wales seriously lags behind its European neighbours, and

there is a correlation in the data that links overall school leaving age to attainment. The potential for learning to end at 16 for some students would appear to lower attainment and ambition for the cohort as a whole.

Nation	PISA 2022 Score	Compulsory education age
England	1,491	18
Poland	1,477	18
Sweden	1,463	18
Belgium	1,439	18
Austria	1,458	18
Latvia	1,452	18
Germany	1,447	18
France	1,435	16
Croatia	1,421	16
Wales	1,405	16
Vietnam	1,403	15

Source: [PISA Scores by Country 2024](#) and [Pisa: Wales slumps to worst school test results - BBC News](#)

Wales also has the highest proportion of vocational students at this level in the UK, which would suggest that our mix of qualifications may not be correct. **Welsh Government set a target and announced policy for [apprenticeship participation](#), but not an accompanying target or policy for A Levels, or other goals.**



The above graph demonstrates a drop in the number of school-leavers staying in full-time education, with increasing numbers leaving full-time education at 16. **In 2023, almost 4,000 16-year-olds left full-time education.**

At the same time, while universities in Wales have historically recruited from **BTEC** courses with ~2,500 Welsh students entering higher education from BTEC routes until 2021, this suddenly nosedived to only 1,405 in 2023.¹ Sixth forms have provided a steady stream of university applicants, and despite numbers studying in sixth forms dipping, numbers recruited from this route are now above pre-pandemic levels.

Given that Wales is lagging behind the rest of the UK in terms of entry to university, careful consideration should be given to any future closures of sixth forms, and there should be a review of the impact on communities where sixth forms have been closed to ensure that young people are not further disadvantaged.

Furthermore, it is very concerning that data drawn from [Careers Wales Year 11 destinations](#) survey taken from the 2022 GCSE cohort indicates that in Wales, an increasing proportion of school leavers are not continuing **in any kind of full-time education**.

The Seren Programme is arguably perpetuating a message to a majority of able learners that university is ‘not for them’ – the selective nature of the scheme rules out plenty of school pupils that have the potential to gain a university education, while providing opportunities aimed at those already most likely to go to university.

- **The extent to which employers are able to engage directly with learners in schools, for example at careers events.**
- **Who else influences learners future career choices (e.g. parents, teachers, peers), and how well are those people supported to do this.**

Parents are clearly one of the key influences over the choices their children make. We know that the children of graduates are more likely to go to university, this is illustrated by the [Wales Centre for Public Policy report](#) data which demonstrate that **parents’ level of education is a marker for whether a student will go onto study A level**.

Children of parents with a L4+ qualification enrol on A levels at a rate of 49%, while those whose parents have qualifications ranging between none and L3 enrol at a rate of 15 – 34%. Key to this is helping them understand how the student finance system works. A [recent report by David Willetts](#) demonstrates the economic benefit felt individually and by society of university education. His report sets out how higher education is a driver of better physical and mental health, even after accounting for other biographical factors, such as socioeconomic background and gender. **The benefits of higher education are felt by the children of graduates too**, and these cross-generational benefits are estimated to be worth at least as much as the financial benefits of increased earnings.

¹ This data is held on licence from UCAS by Universities Wales

Another related issue is that **Welsh graduates studying in England increasingly stay in England**, while fewer English students studying in Wales remain in Wales, giving the Welsh economy lower levels of access to graduate skills. In comparison to other parts of the country, Wales lags behind on application rates to university. In London, more than 50% of 18-year-olds are accepted into higher education. **In Wales we have the second lowest rate in the UK, at around 30%, and the lowest rate of any UK nation, and have had no meaningful improvement in the last decade.**

2. How effective careers support is at compulsory school age

- **To what extent careers support at pre-16 is resulting in positive or negative outcomes post-16 e.g. young people finding themselves not in education, employment or training (NEET).**

Anecdotally, there would appear to be a **lack of awareness** among learners, parents and teachers as to the accessibility of higher education, and specifically the availability and function of student finance for Welsh domiciled students.

There is a need for **improved public awareness around student support.**

There is a vital need to drive up ambition and aspiration among learners from an early age, to ensure all school pupils in Wales are aware of the opportunities presented by higher education, and routes to higher-level skills. A holistic look at advice and guidance available right through the education pipeline will be needed to build ambition and future-proof the Welsh workforce as part of an integrated education plan.

- **Whether work experience opportunities for learners of compulsory school are operational, effective and meaningful and any barriers in that regard.**

Universities Wales is not well-placed to respond to this question.

3. Changes in routes post-18

- **Is there evidence that learners are changing their choices post-18, including a drop in Higher Education enrolments, and if so why?**

As mentioned above, Wales is experiencing an alarming participation challenge in higher education.

The proportion of Welsh-domiciled 18-year-olds entering higher education is lower than the UK, with the **gap between Wales' participation rate and the UK rate now the widest on record, at 6.3 percentage points.** In 2006-2009 the gap was negligible, varying from -0.2% to 1%, meaning Wales' participation rate was largely on a par with the UK average. Since then, Wales has lagged behind significantly.

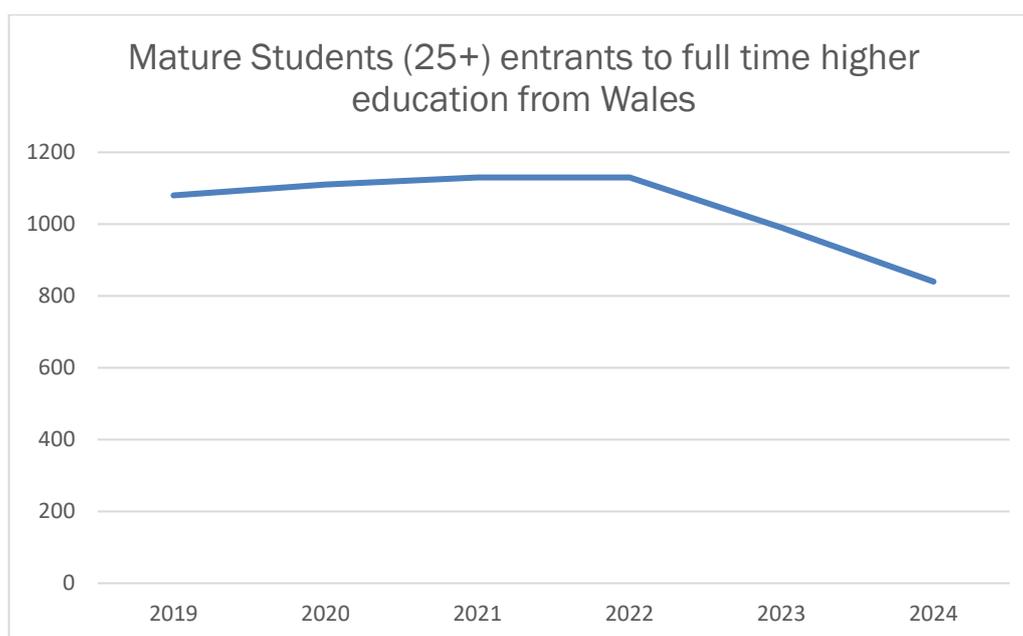
As a result, Wales is lagging behind the UK in terms of developing the higher-level skills needed for the future economy, and a generation is missing out on the economic, health and career benefits of university education.

Part of the challenge is that the **pipeline for higher education is being squeezed**, as fewer Welsh learners are undertaking A Levels. [In England, 47% of school leavers go on to study A Levels, compared to just 33% in Wales](#). Particularly in recent times, sixth form A Level students are far more likely to enter higher education than those engaged with other post-16 routes. **Fewer 16-year-olds undertaking A Levels means fewer students moving into higher education and higher-skilled jobs**. There has also been a decline in BTEC students applying for university.

At the same time, [52% of post-16 learners](#) enrol on vocational learning programmes rather than A Levels. Wales has the highest proportion of vocational students at this level in the UK, which would suggest that our mix of qualifications may not be correct. **Welsh Government set a target and announced policy for [apprenticeship participation](#), but not an accompanying target or policy for A Levels, or other goals.**

While there has been a concerted effort to promote the benefits of apprenticeships, with a government target and supportive policy statements pushing this agenda, there has not been an equivalent drive to promote the benefits of A Levels and the opportunities these qualifications can unlock. As such, with a view to driving up participation across the post-16 landscape, **Welsh Government and Medr should set a target for A Level participation across Wales.**

In terms of the broader landscape of higher education provision, consideration should also be given to changes in take-up among full-time mature students and part-time learners.



Wales has seen a drop in the number of mature students applying and enrolling in full-time higher education, and changes in the part-time market. Unlocking better, more flexible routes to higher-skilled qualifications will be key to addressing these trends.

Worryingly, according to the recent [British Council Next Generation 2024 report](#), 18-30-year-olds in Wales feel that their standard of living is lower than that of their parents. Within this, it is notable that in Wales, [young people's perception of the importance of university](#) for their future career is lower than the UK average. The opportunities of a university education to boost life chances are not being grasped, with considerable ramifications for social mobility and social justice in Wales.

4. Welsh-medium provision

- **The availability of post-16 options (both academic and vocational) through the medium of Welsh, and how this impacts on young people's choices.**

The majority of students entering higher education and studying through the medium of Welsh have followed the sixth form route and Welsh-medium provision at A-level is extremely important for the Welsh-medium HE sector.

Although there has been a substantial increase in Welsh-medium routes available at HE level since the inception of the Coleg Cymraeg Cenedlaethol, the number of students studying through the medium of Welsh at HE has plateaued and further investment is needed to maintain and increase provision and participation.

[London Economics Wales' report to the HEFCW in 2023](#) highlighted that courses delivered in Welsh or bilingually have higher costs associated with them due to the comparatively small class sizes. The funding model, therefore, needs to reflect this to maintain and develop suitable progression pathways for all.

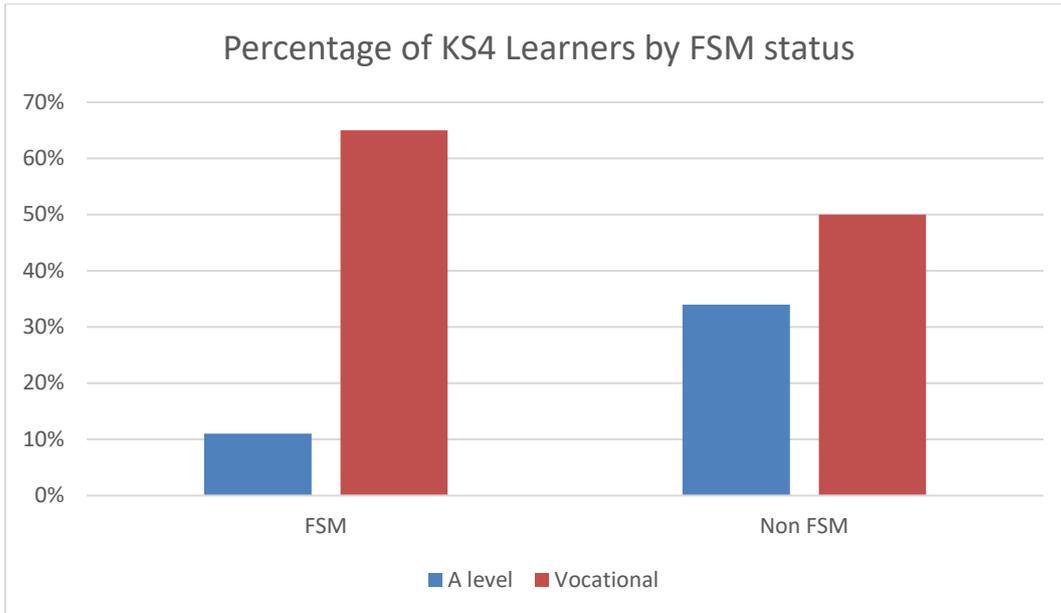
Further investment in Welsh-medium HE provision must be made to achieve the targets related to Cymraeg 2050.

5. Equity of access

- **Are some groups of learners disadvantaged by the current system (e.g. pupils from low-income households, learners with travel needs)?**

Data drawn from the [Wales Centre for Public Policy report](#) indicates that the proportion of key stage 4 learners who are eligible for free school meals (FSM) who progress to A Levels is 11%. Of those that aren't eligible for FSM, 34% go on to do A Levels.

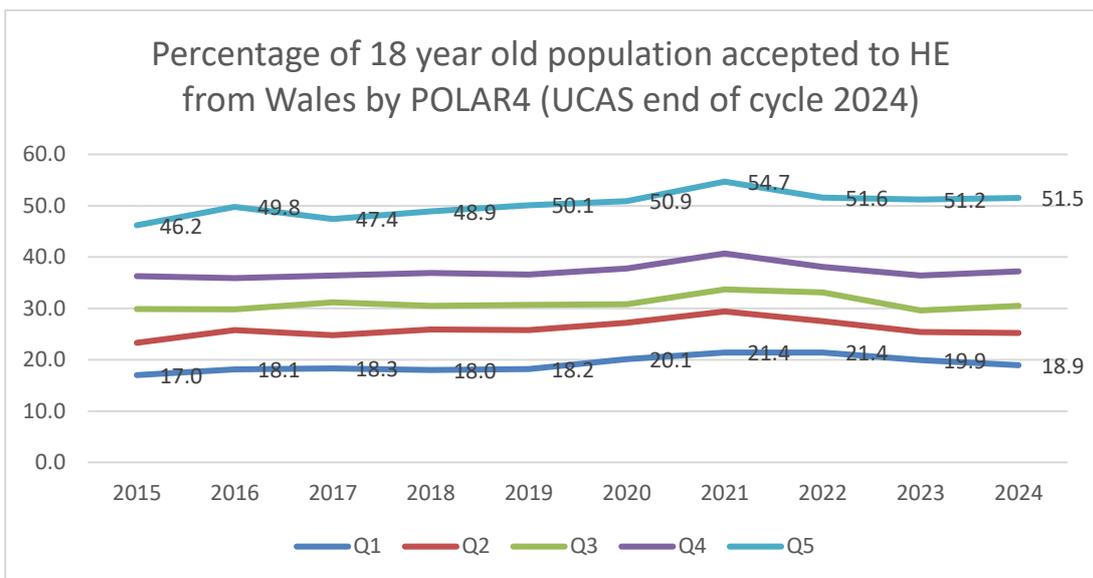
47% of non-FSM students engage with AS levels, compared to 19% of FSM pupils.



We would note that the same report highlights that drop-off rates from AS to A level are concerningly high for some ethnicities.

These patterns are mirrored by POLAR 4 data published by UCAS, which indicates that the participation rate for the most disadvantaged (Q1) students is [significantly lower in Wales](#) than the UK average. In Wales, only 18.5% of Q1 students entered higher education in 2024. The UK average for Q1 is 27.4% - Wales lags by 8.9 percentage points.

In England, the gap between the most and least deprived students' participation rate is [19.3 percentage points](#). [In Wales, the gap is 26.4 percentage points](#).



The [UCAS dashboard of end of cycle 2024](#) provides comprehensive resources with regards to undergraduate data.

- **What support is available for learners to improve access (financial or otherwise)?**

The package of student finance, including grants and loans, available to Welsh-domiciled university students is the most generous of the UK nations. Despite this, Welsh Government communication to promote student finance and the university offer in Wales is lacking.

Welsh universities offer a number of routes to help improve access to higher education, including bursaries and hardship funds. Institutions commonly run summer schools, open days, transition programmes, outreach activity and engage in the [Reaching Wider](#) Programme.

Upon engaging with universities, students are able to work with specialist advisors in student services that can advise on financial and mental health support amongst other things.

The [University Ready](#) resource provides a bilingual platform for free support and guidance for students who are going to university for the first time.

As mentioned previously, anecdotal evidence would suggest that learners are not as aware of student financial support as they could be, viewing tuition fees as a barrier to entry. **Welsh Government should seek to improve awareness and understanding of the university offer in Wales, via the development of the sort of communications activity dedicated to apprenticeships, for example.**

- **Is there any regional variation in the information and support provided about post-16 across Wales? Are there any particular challenges facing learners in rural areas?**

Significant support is provided to school pupils engaged on the **Seren programme**. This is not available in all schools, and favours pupils with higher attainment, leaving out those who would be capable of accessing higher education, who are indirectly being told that university is 'not for them'.

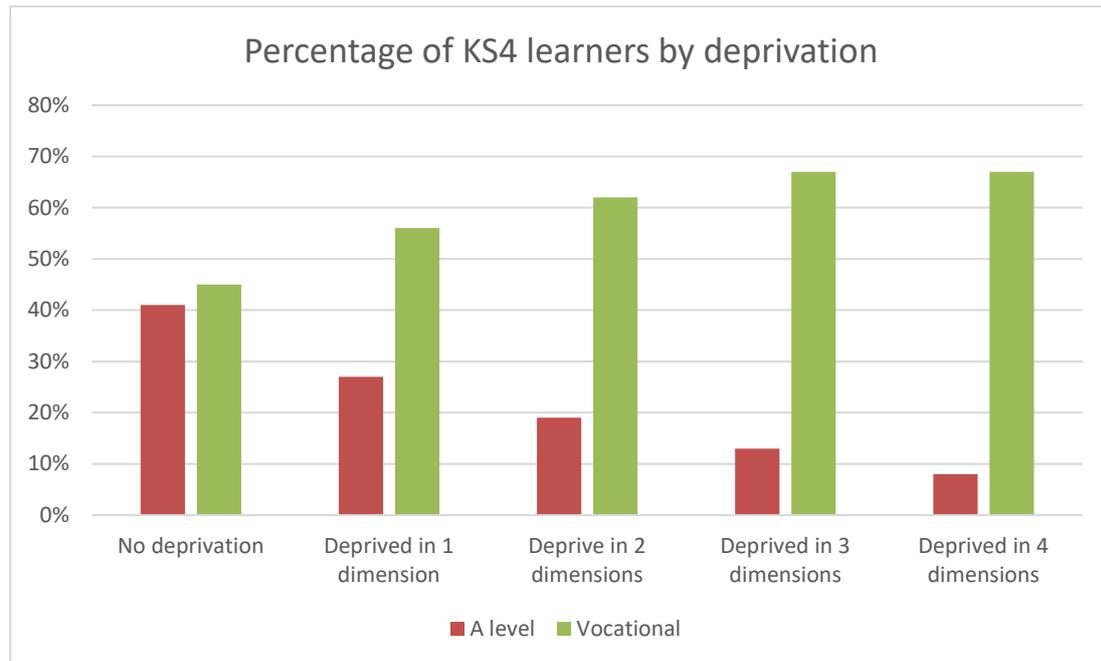
Rurality does not seem to be a key issue in terms of applications to higher education. In terms of UCAS applications, there does not appear to be significant variation between rural and more urban areas. In fact, according to UCAS data², all regions in Wales have a higher participation rate for those considered to be in rural areas than its urban areas. For example, in North Wales the rural rate is 35.6%, the urban is 28%. In Mid and West Wales, the respective figures are 30.6% and 28.5%. In South Wales East they are 32.3% and 27.8%.

² This data is held on licence by Universities Wales

- **Are there any other equality issues?**

The [Wales Centre for Public Policy](#) report notes that progression to Sixth Form was higher among learners who were not recorded as living in deprived households during the 2011 Census (43%) and lowest among those living in households deprived across all four dimensions (13%)

For those experiencing no deprivation (according to the census data referred to in the WCPP report), **entry to A levels is at 41%, sliding to just 8% for those who exhibit deprivation in 4 dimensions.**



In terms of gender, [females tend to be more likely to enter A levels](#) than their male peers. Fluent Welsh speakers are also more likely to become A level students.

Considering the likely intersectionality of these statistics, **deprivation seems to be the defining factor dictating educational progression, and particularly in Wales.**

The socio-economic make up of Wales is not a justifiable explanation for poor participation rates. [POLAR 4 data](#) reveals that despite having similar demographics in terms of deprivation, the north-west region England performs better than Wales in terms of higher education participation.

Overall, a higher proportion of learners in England from the more deprived socio-economic backgrounds enter higher education than their counterparts in Wales:

Rates of entry to higher education	England	Wales
Q1 (most deprived)	24.1%	18.9%
Q2 (second most deprived)	30%	25.2%

Source: [UCAS](#)

6. Post-16 destination data

- **Is there sufficient post-16 destination data collected to understand trends and inform what education institutions deliver? If not, what data is required to fully understand the post-16 landscape?**

The short answer is no. There is **insufficient data available** to fully understand and interrogate trends on the destinations of school leavers, leaving policy makers and providers in the dark on the precise interventions required to tackle the participation problem.

Medr and the Welsh Government have an opportunity to grasp this challenge and develop better data to help us understand where our young people are and what they choose to do.

We would propose that improved data is required on:

- Destinations of school leavers, particularly monitoring 16-18 year olds
- Awareness of financial support available for accessing higher education among learners, teachers and parents/guardians
- Efficacy of the advice and guidance about post-16 options provided to young people
- The impact of the Seren programme on higher education applications as a whole, not just the cohort engaged on the programme
- The impact of closures of sixth forms on A Level take up and progression to higher education
- BTEC enrolments and progression

However, this is the tip of the iceberg. A better understanding of the reasons behind declining attainment is key.

7. Welsh Government's role

- **How effective is the Welsh Government's approach to support participation in the full range of post-16 education and training options?**

Overall, there is an imbalance in Welsh Government's approach, which is driven by targets that are not serving Wales well.

The Seren Programme is an example of a well-intended policy designed to build pupils' ambition, which is arguably providing enhanced opportunities for high achievers while simultaneously reinforcing the message to the majority of our young people that university is 'not for them'.

Furthermore, **pupils on the Seren Programme are encouraged to apply to universities outside of Wales**. Given that data shows that Wales needs an increased numbers of graduates for the future workforce, and those that leave

Wales for university tend to stay in England during some of their most economically productive years, this is arguably a policy lever that backfires.

[HESA data on graduate outcomes](#) demonstrates this 'brain-drain' effect, with only 1 in 10 English graduates remaining in Wales after graduation compared to a quarter of the Welsh diaspora remaining in England. We need to give serious consideration to securing the talent pipeline.

There are examples of successful initiatives elsewhere that Welsh Government should consider developing to address the dearth of support for school pupils not typically invited to participate in Seren. There should be a particular focus on those from more disadvantaged socio-economic backgrounds, who are the least likely to apply for university (by the widest margin of all the UK nations) and an integrated approach to the interface with schools.

Case Study: Higher Horizons

The [Higher Horizons](#) scheme targets students across Warrington, Stoke-on-Trent, Staffordshire, Shropshire, Cheshire and Chester. The scheme has significantly **increased participation across all learners**, and achieved a higher education entry rate for students in receipt of Free School Meals at **38%** - 8 percentage points higher than Wales overall rate.

The regional average progression rate for FSM learners across these areas is 18.3% (similar to POLAR Q4 - the second least deprived group of learners in Wales).

The University Connect part of Higher Horizons specifically targets those in TUNDRA quintiles 1 and 2 (the most deprived areas) and the evidence shows that the more activities are engaged with, the higher the chance of the individual engaging with higher education.

In addition, the [Study in Wales](#) brand has been successfully deployed in target markets overseas for the recruitment of international students to Welsh universities and colleges. Welsh Government should make resources available to build upon this brand and **deploy it domestically to raise awareness of the benefits of higher education, and to encourage Welsh young people to study at Wales' universities**. A broad 'Study and Work in Wales' campaign would encourage learners, their parents and teachers to reflect on the excellent quality higher education available in Wales.

- **Are learners, their families and schools aware of available Wales-wide support and programmes, such as the Young Person’s Guarantee?**

Universities Wales is not equipped to answer this question fully. However, we recommend that as part of **improved data gathering** in this area, Welsh Government should explore the levels of awareness of support available.

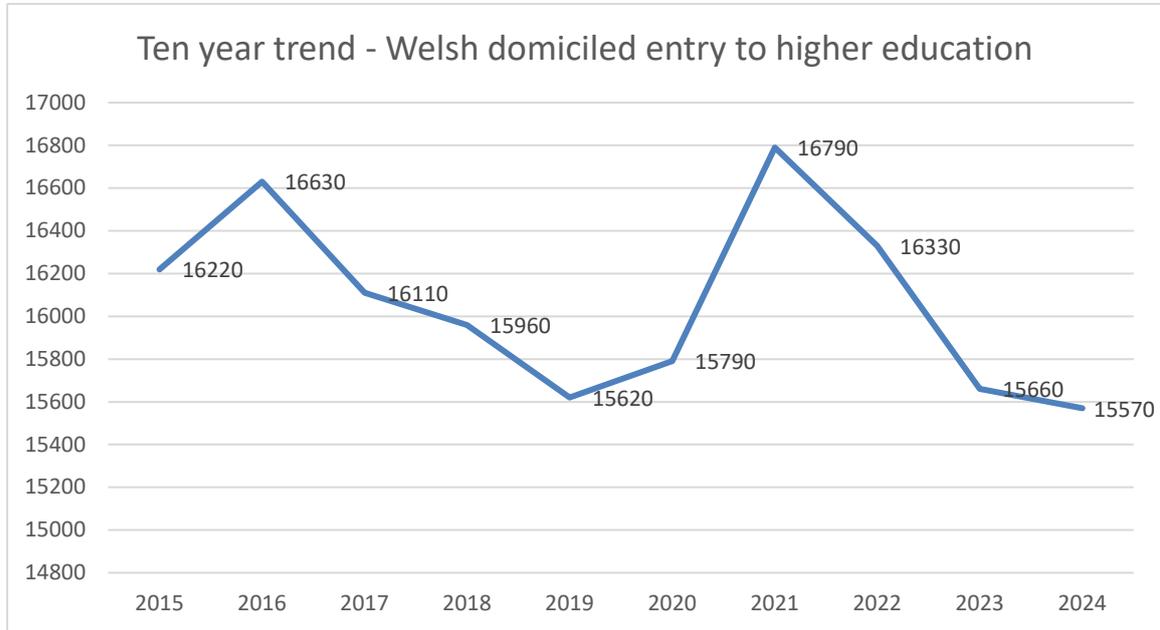
- **Outcomes from Dr Hefin David MS’s [‘Transitions to Employment’](#) report.**

Universities Wales welcomed this report. We particularly agree with the recommendations that improving the transition from further education to university is crucial, as is ensuring learners are informed about the range of opportunities and support available in post-16 education.

Annex: further supporting data

Other supporting data drawn from UCAS

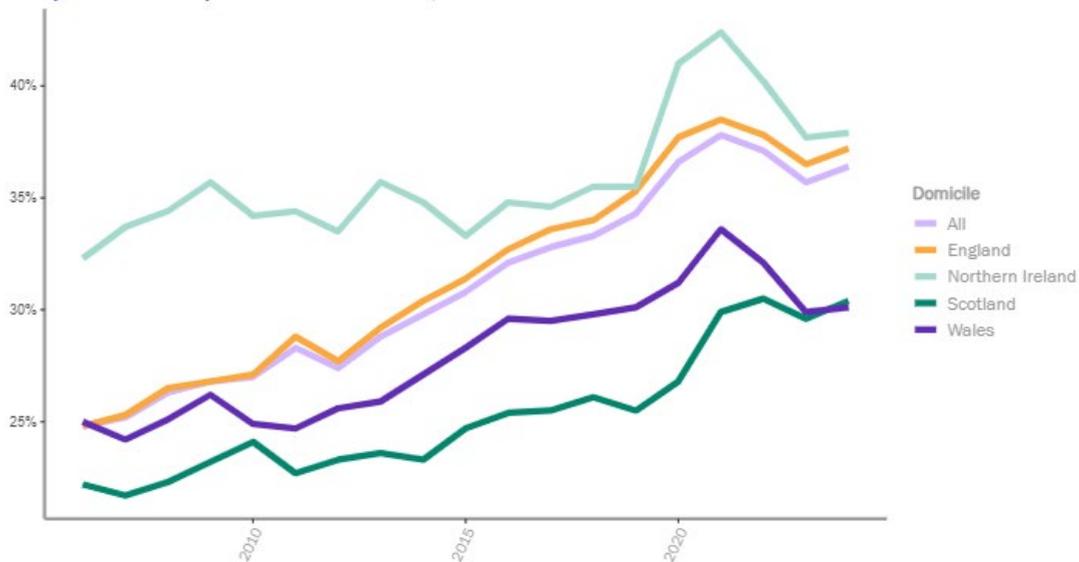
Demonstrating that Welsh-domiciled students' entry to university in the UK are on a downward trend



Proportion of 18-year-olds entering higher education by UK nation – noting Wales is now aligned with Scotland, despite a cap on university places operating in Scotland

Percentage of 18-year-olds who enter full-time higher education ('entry rate') by student domicile

The entry rate for Welsh 18-year-olds was 30.1% in 2024, the lowest rate of the four UK countries.



Source: UCAS 2024 End of Cycle data, December 2024

Noting the participation gap between nations with similar funding systems (i.e. England and Northern Ireland)

