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Barriers to higher education in Wales: evidence review

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Barriers to higher education in Wales: evidence review

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government.

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1. Executive summary

- 1.1. This review considers recent evidence on the barriers to higher education in Wales. It is part of a wider package of work to support the [Diamond reforms to student finance: evaluation plan 2024](#). Higher education in Wales and across the UK is currently facing a challenging time, as laid out in a Welsh Government paper in January 2026 ([Welsh Government, 2026](#)). This provides important context and has implications for the nature and type of barriers that young people experience in both Wales and the UK more widely. Barriers can be understood as factors that inhibit access to and progression within higher education.
- 1.2. Devolution of education, including higher education in the UK has resulted in England, Wales, Scotland, and Northern Ireland having four distinct systems, with different policy and funding approaches to student support. Wales has the lowest participation rates of 18-year-olds in higher education of all UK nations with a 29.2% entry rate in Wales, and 36.3% across the UK, (UCAS 2025 cycle).
- 1.3. In seeking to understand the higher education barriers young people face in Wales the key findings from this review are as follows:
 - The level of financial support across all UK nations falls short of a minimum standard of living for students. The cost-of-living crisis is negatively impacting the vast majority of students at some level across the UK, with direct and indirect consequences for their higher education engagement, mental health and academic performance.
 - Many students need to work alongside studying as a financial necessity. There are substantial consequences to this as many students are spending more hours in paid work. This is not something full-time higher education courses were originally designed to accommodate.
 - Research (Huxley & Davies, 2024) shows there is a widening participation gap between the least and most advantaged students. In Wales, young people from deprived backgrounds are significantly less likely to go to university.
 - Research on challenges to education and low attainment in schools in Wales show that low prior attainment at key skills early in school (which translates into lower GCSE grades) acts as a barrier to accessing higher education. Lower prior attainment can mean that fewer students are doing A-levels or equivalent qualifications needed to progress to university.
 - In Wales, learners in rural areas (as well as those with a lack of public transport) may face practical barriers to accessing tertiary education due to the uneven distribution of institutions. Limited availability of local sixth form and further education provision can constrain subject choice and impact pathways to university.

- Women are more likely to go to university than men and they are more likely to achieve higher degrees. Disadvantaged White young men are least likely to go to university. Research on why this is the case suggests that young men from disadvantaged backgrounds face barriers such as low prior academic attainment (from early educational stages), increased likelihood of exclusion from school, a lack of male role models, uncertainty about successful job outcomes, financial concerns and cultural worries about not fitting in.
- Medr data (2025) indicates that the number of students from minority ethnic backgrounds has been increasing. There are lots of complexities to the evidence that indicate deeper inequalities around access to high tariff institutions and outcomes that require further research.
- The proportion of disabled students in Welsh higher education providers is increasing. This could suggest that the barriers faced by disabled students are lessening. However, this is a complex picture and could also result from more reporting of disabilities.
- More diverse student populations have varying needs and face cost-of-living challenges that make the traditional full-time study model inaccessible or extremely challenging. This may be due to a range of factors, such as caring responsibilities, disabilities, mental ill health, economic disadvantages, or being from a minority ethnic background.
- Literature suggests that the impact of the COVID-19 pandemic on education and outcomes is ongoing with the impacts still unfolding on attainment, mental health and wellbeing.
- The graduate job market is changing and there are claims that AI is partly responsible for a reduction in graduate level roles. This contributes to questions around the perceived 'value' of university education and its association with successful labour market outcomes on graduation.

2. Introduction

- 2.1. In the recent Welsh Government paper published in January 2026, the Minister for Further and Higher Education describes a commitment to a progressive approach to higher education (HE) student support in Wales: ‘...financial barriers need not hold back talent and ambition, because we strongly believe that your options for further study should never be limited by your background’. However, a series of challenges facing the sector are discussed in the context of ‘shifts in learner participation and needs, economic pressures, and the enduring consequences of the pandemic and EU exit’ ([Welsh Government, 2026](#)).
- 2.2. Similarly, the recent UK Government white paper published in October 2025 on post-16 education and skills stated that ‘higher education should be a gateway open to all who have the ability and desire to pursue it’ (HM Government 2025). HE has many well cited benefits for individuals and wider society ranging from increased earnings through the life course, better career prospects, reduced disadvantage and increased wellbeing.
- 2.3. A recent rapid evidence review on the value of HE, found that it can increase social and geographical mobility for disadvantaged young people (Transforming Access and Student Outcomes (TASO) in Higher Education 2023). However, there is a level of complexity to this, for example there are differences in job outcomes for disadvantaged graduates and those from more advantaged backgrounds (TASO 2023). As summarised by the House of Commons research briefing on HE in the UK, economic outcomes for graduates ‘do vary depending on where a student comes from, the subject they study, their gender and ethnicity, and their socio-economic background’ (House of Commons 2024). It cites Institute for Fiscal Studies (IFS) research which found that economic gains do not result for all graduates and one in five graduates would have been better off financially had they not gone to university. This chimes with recent research carried out for the Diamond Reforms evaluation (Welsh Government 2026) which found that young people recognise the value of HE but are also questioning whether all degrees offer a good return on their investment. Correspondingly financial uncertainty, fear of debt, and doubts about graduate job prospects remain significant barriers.

3. Scope

- 3.1. This review considers evidence on the barriers to HE in Wales. It is part of a wider package of analytical work reviewing the Diamond Reforms to student finance. In 2016, the Welsh Government published an independent review of HE funding in Wales led by Sir Ian Diamond. In response to the recommendations of the review the Welsh Government implemented a series of changes to student finance called the Diamond Reforms. In 2024, the Welsh Government set out its plan to evaluate the Diamond Reforms (Welsh Government 2024). One of the objectives under the Diamond Reforms was to widen access to and

participation in HE to Welsh students. A central research question within the evidence plan work package on widening access was: **What are the barriers to accessing HE in Wales?**

3.2. This review focuses on the recent Welsh and UK evidence available to answer this question. Welsh evidence is prioritised, however wider UK evidence is included where there is limited Welsh specific evidence and because of the interconnected nature and shared history of HE in the UK. Many barriers apply across the UK, for example in relation to inequality and finance pressures. When considering 'structural barriers', Welsh and UK evidence is separated to show more clearly the situation in Wales. The focus of the review is on barriers to participation, including accessing HE and progression within it, along with outcomes and student experience. Barriers have not been considered separately at distinct stages of the HE journey. Further research could consider the detail of a barriers pathway to understand how barriers manifest at individual stages of pre-entry, entry and post HE.

3.3. The report is structured as follows:

- Firstly, a brief methodology section is included setting out how this evidence review was conducted including the limitations that apply.
- Secondly, some relevant context to HE in the UK and in Wales is outlined. This includes a definition from legislation of 'higher education' but does not give a comprehensive account of all the relevant background.
- Thirdly, this review continues by outlining what we mean by 'barriers' and how this has been applied to distinguish between 'structural' barriers and 'emerging' barriers for the purposes of this study. Structural barriers are longstanding and result from social or economic structures such as educational inequality, the impact of socio-economic disadvantage and other demographic characteristics, as well as the cost-of-living and financial constraints. Emerging barriers are barriers that have resulted following more recent events, such as the coronavirus pandemic (COVID-19), the decline in young peoples' mental health, the changing needs and realities of student lives, questions about the 'value' of HE, the contention that traditional HE models are outdated and the impact of AI on the graduate labour market.
- Lastly, this review concludes by summarising some key findings from the evidence in the literature.

4. Methodology

4.1. This review was based initially on reviewing and synthesising evidence from relevant and related publications on similar subjects, including participation barriers in tertiary education, interventions to increase participation and inequality in tertiary education, as well as research supporting the Diamond Reforms evaluation. It was supplemented by a set of literature searches carried

out online between October 2025 and January 2026. Searches were completed with a focus on terms including 'barriers' and 'inequality' in HE. This initial search was supplemented with other literature identified from searches on the following websites: Commission for Tertiary Education and Research (Medr), Higher Education Policy Institute (HEPI), UCAS, House of Commons Library, IFS, TASO and government websites.

4.2. Results were limited to UK evidence and to very recent (2021 onwards) research papers, government research papers, journal articles and some 'grey' literature. The search was limited to recent literature to focus on understanding the impact of recent events on access to and participation in HE. For the purpose of this review, grey literature refers to literature produced by independent, civil society, the third sector, governmental or commercial organisations or by academics for non-academic audiences. The information presented in this document should be considered in the context of the search criteria used.

5. Limitations

5.1. This is a thematic and focused literature review undertaken for a specific purpose, and as such is not comprehensive. As outlined above, it is limited to very recent literature (2021 onwards). This means it includes evidence reflecting the changing HE sector in Wales following the implementation of the Diamond Reforms, the impact of the COVID-19 pandemic and the sharp increase in the cost-of-living experienced from 2021. It is recognised that there is a huge amount of older literature on this topic from different sectors and organisations. It does not cover barriers in relation to postgraduates and part-time students as the evidence in relation to these groups is covered in the research to support the evaluation of the Diamond Reforms (Welsh Government 2026).

6. Higher education context

Higher education definition

- 6.1. HE is generally understood to mean undergraduate and postgraduate degrees taken by students aged 18 years or above. In Wales, HE is defined in legislation, as set out in the Further and Higher Education Act 1992, Higher Education (Wales) Act 2015 and the Tertiary Education and Research (Wales) Act 2022.
- 6.2. Under the legislative framework, 'courses of higher education' are defined as courses above the level of secondary education, including (but not limited to): first degrees (for example BA, BSc), postgraduate degrees (for example MA, MSc, PhD), Higher National Diplomas (HNDs) Higher National Certificates (HNCs), certificates or diplomas of higher education and other courses at a comparable academic level.

Devolution

- 6.3. As a House of Commons research briefing recognises, the countries of the UK have a 'shared history where higher education is concerned, and students and staff flow between them' (House of Commons 2024). Devolution of HE has meant that England, Wales, Scotland, and Northern Ireland have taken different paths in how they finance and regulate their higher education systems.
- 6.4. Research on how devolution has evolved in HE has found that the four nations have taken distinct and different policy approaches, and that there are important funding and policy differences, with Wales offering the most generous financial maintenance support to students (London Economics et al 2024). There are also differences between the four nations in terms of levels of participation and inequalities in HE amongst different demographic groups as explored by the Education Policy Institute and the Oxford University Centre for Skills, Knowledge and Organisational Performance.
- 6.5. Its research found major differences in the provision of post-16 education and training across the UK nations (Robson et al. 2024). There are two key HE findings from this study. Firstly 'inequalities are large everywhere'. Those from more disadvantaged backgrounds are less likely to achieve A-levels and less likely to achieve degree-level qualifications (Robson et al. 2024). Secondly, the report found that 'outcomes look particularly concerning in Wales' (Robson et al 2024). There are low levels of HE participation in Wales with Welsh young men having the lowest levels of HE participation compared to their counterparts across the UK.

Finances

6.6. It is important to highlight recent developments across the UK university sector in terms of financial instability as this provides important context and has implications for the nature and type of barriers that young people experience. There are far reaching financial implications to universities from higher costs, international student intake and tuition fees not keeping up with increasing inflation over recent years. Consequently, the financial viability of the HE sector across the UK has come under increasing strain. Some of these issues have been addressed by the recent UK Government white paper. For example, the white paper announced that student tuition fees in England will be increased in line with inflation from 2026 (HM Government 2025).

6.7. The Office for Students reported that 43% of institutions included in their analysis from England forecast a deficit for 2024 to 2025 and that universities across the UK announced intentions to cut jobs (Office for Students 2025). In early 2025, Cardiff University announced proposals for restructuring of provision and the loss of 400 academic jobs (Welsh Government 2025). Universities across Wales reported significant financial deficits in 2023 to 2024 (Welsh Government 2025).

6.8. There are also delivery problems because the current funding model is designed for traditional three-year programmes and does not adequately support the growing demand for shorter more flexible options (Welsh Government 2026). Literature suggests that outdated HE models may impact the ability of young people from different demographics to access HE as it is a model that does not fit with current student needs, or the reality of their lives as recognised by recent research on students' working lives (HEPI 2025):

The outdated image of a young, full-time student from a financially secure background no longer reflects the reality of the modern student population. Today's students are more diverse in age, background and life circumstances... These students often have additional responsibilities, such as caring for dependents, contributing to household income or managing health conditions. These intersecting pressures increase their reliance on paid work and reduce their capacity to engage fully with university life (HEPI 2025).

6.9. Furthermore, maintenance support for students has not risen in line with recent inflation increases across the UK, which has meant students have seen cuts to their financial support in real terms (House of Commons 2024). Consequently, many students cannot maintain a minimum standard of living from student finance alone.

6.10. Some of these issues have been addressed in Wales by a Welsh Government statement on financial support and tuition fees in higher education (Welsh Government 2025). For example, maintenance grants will increase for the first

time since 2018 by 2.0%. HEPI recommends that the current need for many students to work alongside studying is recognised as a ‘central factor shaping student well-being, academic engagement, outcomes and long-term prospects’ (HEPI 2025).

- 6.11. The challenges that universities are facing, the subsequent decisions and implications of these challenges, combined with the reality that many students are working alongside their studies inevitably impact on young people’s perception of the benefits, value and barriers of a university education. As such, they are directly relevant to this review and should be taken into account as important context.

7. Higher education in Wales

- 7.1. In terms of the regulatory framework in Wales, the Tertiary Education and Research (Wales) Act 2022 established a new Commission for Tertiary Education and Research (Medr) that began operation on 1 August 2024 as an arm’s-length body of the Welsh Government. Medr’s remit is to fund and regulate the tertiary education sector as an integrated system in Wales, and this includes responsibility for the funding and regulation of HE.
- 7.2. HE in Wales is provided mainly through nine universities, including the Open University. There are also further education colleges in Wales, some of which offer HE courses such as degrees and diplomas, usually in conjunction with a nearby university. As outlined in the House of Commons report (2024), universities that deliver HE courses are ‘autonomous, self-governing institutions’ meaning that they are responsible for establishing their own policies and procedures, but this is within a wider policy context set at a national level.
- 7.3. In relation to the pipeline to HE, the Welsh school system remains (largely) one of comprehensive, non-selective schools funded and managed by local authorities. Roughly a quarter of schools are Welsh-medium (Welsh is the primary language for teaching and learning). Far fewer pupils in Wales attend independent schools compared to both Scotland and England (HEPI 2025).
- 7.4. The Senedd report on routes into post-16 education and training highlights that fewer 18-year-olds from Wales apply to university than 18-year-olds in England, Scotland and Northern Ireland (Welsh Parliament 2025). Recent 2025 data shows that Wales has the lowest participation rates of 18-year-olds in HE of all UK nations with a 29.2% entry rate in Wales, and 36.3% across UK, (UCAS 2025 cycle). However, the Senedd report also highlights that during 2022 to 2023 Wales had a higher proportion of mature (aged 21+) and part-time students than England (Welsh Parliament 2025).
- 7.5. Despite the differences between the four nations, there is an ‘interconnectedness’ in the UK’s HE landscape (HEPI 2025). HEPI notes that ‘student mobility is a distinctive characteristic of higher education in Wales.

Welsh students have long been drawn to the larger English sector...and, each year, just under a third of Wales domiciled undergraduates enrol on courses at providers in England' (HEPI 2025).

- 7.6. In Wales, rural learners (as well as those with a lack of public transport) may face practical barriers to accessing tertiary education due to the uneven distribution of institutions. Limited availability of local sixth form and further education provision can constrain subject choice and pathway flexibility (Sibieta & Miles 2024). These constraints may disproportionately affect learners in more remote or deprived areas. Lack of sixth form provision in some areas may contribute to the lower rates of students doing A-levels needed for admission to HE. Furthermore, the Senedd report on routes into post-16 education and training noted the challenges arising from conflicts of interest and competition between schools with Sixth Forms and other post-16 providers, which may be impacting the choices young people are making (Welsh Parliament 2025).
- 7.7. The Higher Education Funding Council for Wales (HEFCW) (which had HE responsibility before Medr was established) undertook an investigative study on HE delivery in Wales and found that only 1 in 3 young Welsh people went on to HE. They concluded that people living in Wales who: have a disability, are carers, come from minority ethnic backgrounds, or are young men, have traditionally been underrepresented in HE (HEFCW 2024). The study considered HE delivery models and whether they are meeting student needs. It found that the three-year full-time undergraduate honours degree is the dominant delivery model. Other models exist and there is some diversity but there are fewer opportunities outside the dominant model (HEFCW 2024).
- 7.8. There is a widening participation gap between the least and most advantaged students in Wales. Research linking and analysing individual-level administrative data from Wales shows that young people from more advantaged socio-economic backgrounds are more likely to participate in HE than their less advantaged peers (Huxley & Davies 2024). This is largely due to differences in prior educational attainment (see further below). Furthermore, it found differences in overall participation rates in HE between schools and between local authorities in Wales (Huxley & Davies 2024). Widening access and participation in HE in Wales has been and continues to be a focus for both the Welsh Government, HEFCW and now Medr.

8. Barriers

- 8.1. Barriers can be understood as factors or challenges that inhibit access to, participation and progression within HE. The landscape is complex and there are different types of barriers that have been categorised in different ways in the literature. Many barriers experienced by young people overlap and interrelate, such as those in relation to finance, student work and the perceived 'value' of HE. The Wales Centre for Public Policy (WCPP) evidence review on widening participation in tertiary education categorises challenges as attitudinal, situational, and institutional (Neesom et al 2024 citing Pember et al. 2021). Clearly too, in addition there are financial barriers, such as cost-of-living pressures, lack of adequate financial support and increased tuition fees (Neesom et al 2024).
- 8.2. In this review, barriers are conceptualised in terms of 'structural' barriers, such as entrenched and long-standing inequality, and 'emerging' barriers that are relatively new and are a result of recent events and circumstances. The pervasive nature of inequality within education is a structural, rather than an individual level prohibitive factor, that influences and interrelates with barriers on multiple levels, for example by impacting on a young persons' ability to get the grades to go to university. Emerging barriers are a consequence of contemporary events and outline current difficulties that have arisen as a result of the COVID-19 pandemic, the cost-of-living crisis and the widespread uptake of AI in workplaces (and its potential impact on graduate jobs). These barriers may impact the perceived 'value' of university.

9. Structural barriers

Inequality

- 9.1. There are a number of barriers that relate to inequality, such as socio-economic background, gender, ethnicity and disability and these are explored in detail below. However, it is firstly necessary to understand the nature of inequality as a structural barrier in education that is not down to individual failings. Societal level structures rooted in inequality mean that it is more difficult for some young people to access, or progress in HE. This explains other barriers that follow on from educational inequality such as low prior attainment.
- 9.2. The IFS report on educational inequality (Farquharson et al 2022) is a detailed review on all aspects of educational inequality. It highlights that differences in educational attainment emerge early in childhood and develop throughout an individual's lifetime:

Educational inequalities by family background are substantial, pervasive and stubbornly persistent. At all stages of education, children and young people from disadvantaged backgrounds are far less likely to achieve educational

benchmarks. These gaps are even larger, in proportional terms, when we consider higher levels of attainment (Farquharson et al 2022).

Socio-economic disadvantage in Wales

- 9.3. Socio-economic disadvantage can be defined as: 'living in less favourable social and economic circumstances than others in the same society' (Mills 2021) and may include living in a deprived area, having little income and, or experiencing material deprivation (Mills 2021). Socio-economic disadvantage operates as a barrier to children's overall education and has implications for educational outcomes, including whether a young person goes on to HE. It is linked to worse educational outcomes in children, impacting rates of progression and levels of attainment (Mills, 2021). There is an 'attainment gap' by parental income level across all stages of education, and in recent years, COVID-19 has widened this gap.
- 9.4. In Wales, young people from deprived backgrounds, particularly those eligible for free school meals (FSM), are significantly less likely to progress to HE. GCSE results show that those eligible for FSM have lower percentages of students achieving A* to C (39% in 2024 to 2025) than those not eligible (68.3% in 2024 to 2025) (Welsh Government Stats Wales 2026).
- 9.5. WCPP research shows that learners eligible for FSM are less than half as likely to enter HE (19%) than learners who are not eligible (43%) (Huxley and Davies 2024). UCAS data cited in the Senedd report on routes into post-16 education and training show that in the most deprived areas (quintile 1), 20.5% of 18-year-old learners applied to go to university, compared to 50.2% in the least deprived areas (quintile 5) (Welsh Parliament 2025).
- 9.6. Learners from higher socio-economic backgrounds are more likely to attend sixth form, while those from lower socio-economic backgrounds are more likely to attend further education colleges. As noted above, this is partly shaped by availability and a lack of sixth form provision in some areas that may push learners towards vocational routes (Sibieta & Miles, 2024).
- 9.7. Socio-economic disadvantage exists throughout Wales. Recent research suggests that almost one-third (31%) of children live in relative income poverty after housing costs are considered (Welsh Government 2025). The report highlights that in Wales there is considerable geographical variation in both the prevalence and severity of socio-economic disadvantage, but it is found in all locations, from densely populated urban areas to rural localities.
- 9.8. In Wales low attainment in schools was investigated in the IFS report on challenges to education in Wales (Sibieta 2024). Programme for International Student Assessment (PISA) scores were referenced in this report as a way of comparing young people's skills in reading, numeracy and science. PISA is the Office for Economic and Social Development (OECD) programme that 'measures 15-year-olds' ability to use their reading, mathematics and science

knowledge and skills to meet real-life challenges' (OECD 2026). Key findings from the report are:

- PISA scores declined by more in Wales (since 2018) than in most other countries in 2022, bringing Wales to its lowest level which was below the average across OECD countries and significantly below those seen across the rest of the UK.
- These differences extend to GCSE results. In England, the gap in GCSE results between disadvantaged and other pupils was equivalent to 18 months of educational progress. In Wales, it was even larger at 22 to 23 months in 2019.
- Lower scores in Wales cannot be fully explained by higher levels of poverty.
- There are worse post-16 educational outcomes in Wales, with a higher share of young people not in education, employment or training than in the rest of the UK (11% compared with 5–9%), lower levels of participation in HE particularly amongst young men and lower levels of employment and earnings for those from disadvantaged backgrounds.
- It has been suggested that the explanation for lower educational performance reflects longstanding differences in policy and approach, such as lower levels of external accountability and less use of data (Sibieta 2024).

9.9. Low prior attainment at key skills early in school translates into lower GCSE grades acts as a barrier to accessing HE. This is particularly the case for students from disadvantaged backgrounds where different factors come together (such as a lack of support structures, and differences in parental expectations) and hinder attainment and reduce their ability to progress to HE (Welsh Parliament 2025).

9.10. Lower prior attainment can mean that fewer students are doing A-levels that lead to university. The Senedd, in its report on routes into post-16 education and training, cites census data indicating that 41% of learners who experience no deprivation do A-levels, compared to 8% of learners who exhibit deprivation in different areas. More generally the report highlights that the proportion of young people progressing to AS levels during 2024 to 2025 remains lower than the pre-pandemic period (52% of pupils progressed to AS levels during 2017 to 2018 compared to 49% during 2024 to 2025). Universities Wales argue that 'fewer 16-year-olds undertaking A-Levels means fewer students moving into higher education and higher skilled jobs' (cited in Welsh Parliament 2025).

Gender – Wales

9.11. Women are more likely to go to university than men and this has been the case for a number of years. Women are also more likely to achieve higher degrees. Medr data shows that the size of the majority of female students in

HE has increased from 55% during 2016 to 2017 to 56.8% during 2024 to 2025 (Medr 2026). In Welsh HE providers, this proportion has been between 56% and 57% each year since 2018 to 2019 (Medr 2026). There are differences in subject choice between men and women and the proportion of male to female students varies a lot by discipline, this is examined further elsewhere (Farquharson et al 2022).

9.12. UCAS data shows, the university entry rate gap in Wales for 18-year-olds, is bigger than other parts of the UK. There is considerable discrepancy too by ethnic origin, with White disadvantaged young men being most unlikely to go on to university (Hillman and Brooks 2025).

Gender – UK

9.13. Gender equity in access to HE does not yet translate to equity in progression, equal earnings or well-being. Women are underrepresented in many subjects and the higher number of women going to university does not translate into higher earnings for women on graduation. As reported by the House of Commons: ‘male graduate average earnings are around 6% higher than female earnings one year after graduation. This earnings gap grows substantially over their early careers and reaches 30% ten years after graduation’ (House of Commons 2025). There is a lot of evidence that could be examined further to pick out the barriers and complexity for women that operate to prevent them from progressing, earning and capitalising on their higher education, but that is beyond the scope of this review.

9.14. The barriers that operate to prevent young, disadvantaged men from going to university have been examined by HEPI in a report titled ‘Boys will be boys: The educational underachievement of boys and young men’ (Hillman and Brooks 2025). The report refers to UCAS data for applicants aged 19 and states that during ‘2024 to 2025 there were around 44,000 fewer UK-domiciled men than women who accepted a place at a UK higher education institution’ (Hillman and Brooks 2025).

9.15. Young men especially those from disadvantaged backgrounds face a number of barriers including low prior academic attainment, that starts early in educational life. They are more likely to be excluded from school and have few male role models that promote HE. Research identifies motivational barriers from going on to HE, such as the opportunity costs from not being able to enter full-time work, uncertainty about successful job outcomes and concerns about not fitting in (Hillman and Brooks 2025).

9.16. Hillman and Brooks claim there has been a reluctance to consider these issues, partly due to the barriers that women have historically faced. They summarise this as follows:

While the problem of male underperformance has been written about by HEPI and others before, there has been little action or much concern until recently. It has sometimes felt like, even when the problem of male underperformance has been understood, it has been seen as an immutable fact of modern life or one that is too hard to tackle, needing significant financial resources, a shift in aspiration levels and a change in culture. The lack of urgency may stem in part from the unavoidable fact that, historically, the roles were reversed, with more male than female students (until the 1990s) or a general sense that women face so many remaining barriers of their own, especially in the labour market... (Hillman and Brooks 2025).

Ethnicity – Wales

- 9.17. Data from Medr (Medr 2025) indicates that the number of students from minority ethnic backgrounds has been increasing over the years. Medr's report outlines information on the ethnic background of those applying to HE via UCAS, the numbers of students at HE providers in Wales, and their degree outcomes. Medr's most recent statistics on students in HE outlines that 17% of enrolments in 2024 to 2025 were from students with an ethnic minority background. This was an increase from 16% (in 2023 to 2024) and 10% in 2016 to 2017 (Medr 2026).
- 9.18. There is a general trend for an increasing proportion of entrants being from Asian, Black, Mixed ethnic background and Other ethnic background groupings, with the largest increases being amongst those from an Asian ethnic background (Medr 2025). However, the percentage of applicants being made an offer is consistently higher for those from a White or Mixed ethnic background than those from an Asian, Black or Other ethnic background. This is true for 18-year-old applicants and applicants of all ages (Medr 2025).
- 9.19. In terms of outcomes, Medr highlights that between 2016 to 2017 and 2023 to 2024, White students have consistently been more likely to be awarded a first-class honours degree than students from any other ethnic background. Students from a Black ethnic background have consistently been more likely to be awarded a lower second class or third-class degree than students from other ethnic backgrounds (Medr 2025).

Ethnicity - UK

- 9.20. Research has found that people from minority ethnic backgrounds are more likely to be the first in their family to go to university (Henderson et al 2019). This is relevant because these students are less likely to attend high tariff or prestigious universities and are more likely to drop out. Barriers for minority ethnic groups include gaps in previous academic achievement, a lack of knowledge and support, financial concerns and geographical barriers (Le Carpentier 2023). For students who are the first in their family to go to

university a lack of knowledge makes it more difficult for them to make decisions about HE.

9.21. A qualitative study seeking to understand barriers and facilitators to university access in disadvantaged UK adolescents by ethnicity found that ethnic minority students reported similar barriers to applying to university as White disadvantaged students (McCabe, et al 2022). The findings indicate that financial issues are a key barrier to university access as students from all ethnicities mentioned this. However, minority ethnic students mentioned how university may not be 'worth it' whilst White students were more likely to mention not being interested in university and to view non-graduate employment opportunities as more attractive.

9.22. There are lots of complexities to the evidence and the available data on ethnicity and access to HE and outcomes, that indicate deeper inequalities around access to high tariff institutions and outcomes which are beyond the scope of this review. It is important to note that ethnicity, socio-economic background and sex intersect and that the evidence shows that White young men from low socio-economic backgrounds consistently having the lowest participation rates in HE (IFS 2024).

Disability - Wales

9.23. Medr data shows that the proportion of disabled students in Wales is increasing. The proportion has increased from 13% during 2016 to 2017 to 17% during 2022 to 2023 (Medr 2025). Recent Medr data outlines that 22% of enrolments at Welsh HE providers during 2024 to 2025 were by students known to have a disability (Medr 2026). This could be an indication that the barriers faced by disabled students in accessing HE are lessening. However, this is a complex picture and could also result from an increase in reporting of disabilities amongst the undergraduate population.

Disability – UK

9.24. During 2020 to 2021, 17.3% of the undergraduate population in the UK reported a disability, representing a 47% increase since 2014 to 2015 (TASO 2023 citing Higher Education Statistics Agency (HESA) data 2019 to 2020). This increase is largely explained by the increase in students reporting a mental health condition (TASO 2023). Alongside these rises, in general there have been improvements in support and provision for disabled students over the last 10 years at a UK and institutional level (TASO 2023). UCAS has improved information for disabled students and there have been increases in the declarations of disability among accepted applicants by 20% during 2022 to 2023 (Disabled Students UK 2024). However disabled students are one of the least satisfied student groups.

- 9.25. There is substantial variation in the nature of ‘disability’ and consequently in disabled students’ experiences of the different barriers that exist. Detailed consideration of this is beyond the scope of this review. However, in general, the literature suggests that students experience different inequalities and barriers in HE including accessibility issues, poorer student experience, and reduced labour market outcomes (TASO 2023). Evidence from Disabled Students UK 2024, also report of additional financial and information barriers and higher levels of anxiety (Disabled Students UK 2024). How disability intersects with other characteristics is also relevant when considering how different factors combine to accentuate barriers.
- 9.26. A UCAS report written in collaboration with the Disabled Students’ Commission, that explores the experiences of disabled students and their progression to HE provides insights into the challenges they face (UCAS 2022). Findings from their research show that disabled students are more likely to defer entry to HE due to delays with support and that disabled students’ experiences vary significantly by impairment type, socio-economic background, ethnicity, and other personal characteristics (UCAS 2022).
- 9.27. It is clear that the student population within contemporary HE has varying, specific and different needs and therefore there are different barriers that may operate in isolation, or in conjunction with other characteristics to impact access to and progression in HE. Disabled Students UK is calling for adequate information to understand more about student experiences across the sector and to increase the monitoring of disabled students’ experiences and those policies and practices that enable universities to meet disabled students’ needs and reduce barriers. (Disabled Students UK 2024). UCAS recommend that the progression journey for disabled students starts earlier and greater transparency and detail about support for disabled students in HE (UCAS 2022).

Finances and cost of living pressures – Wales

- 9.28. Wales provides financial support for university students that is more generous than other parts of the UK. This is outlined in detail in the Senedd report on routes into post-16 education and training (Welsh Parliament 2025) and updated by the financial support 2026 to 2027 written statement (Welsh Government 2025). In the recent Welsh Government paper published in January 2026, there is a commitment to a progressive approach to HE student support in Wales. Further detail about the financial support available in other parts of the UK can be found in the House of Commons library reports titled ‘Higher education in the UK: systems, policy approaches and challenges’ (2024) and ‘Student support for undergraduates across the UK in 2025 to 2026’ (2025).
- 9.29. In Wales, the support includes loans for university tuition fees (to be repaid once the student has finished their course and their income is in excess of the

repayment threshold) and a grant to help with living costs, of between £1,000 and up to £8,100 (£10,124 in London), depending on family income and whether the student will be living with their parents. Students can also top up their living costs grant with a loan, up to a maximum of £12,345. Students with disabilities and responsibilities for dependents can apply for additional financial support. In England no grants are available, and maintenance support is solely via student loans.

9.30. In Wales data from the student income and expenditure survey 2021 to 2022 (Welsh Government 2024) found that income from paid work across all full-time students increased and contributed a larger proportion of overall income. During 2021 to 2022 the proportion of full-time students working alongside their studies was 54%. Given the increase shown in the 2025 HEPI UK-wide survey (below) over the last three years it will be important to see if this increase is reflected in the Welsh specific data.

9.31. The cost of university (tuition fees, living costs and loan costs) has been cited as one of the most commonly raised barriers to HE amongst stakeholders in the HE context and is particularly relevant in deterring those from lower socio-economic backgrounds from going to university (Welsh Parliament 2025). However, in Wales, the Senedd has noted 'certain paradoxes about the cost of university for learners in Wales'; Wales has a generous financial support offer for university students compared to other UK nations. Yet, the cost of university is putting off many learners from going.' (Welsh Parliament 2025). The evidence from the Diamond evaluation report (2026) suggests that financial worries especially around understanding student finance, fear of debt, and the cost of living, continue to act as persistent concerns to HE engagement. However, for most, this current existing evidence suggests that whilst student debt was a source of worry, it did not deter entry into HE.

Finances and cost of living pressures – UK

9.32. Since the cost-of-living crisis there are fears that HE students are at risk of becoming 'the forgotten group in the cost-of-living crisis' (House of Commons 2024). Students' monthly living costs have increased significantly meaning that the level of financial support across all UK nations (that has not kept up with these increases) falls short of a minimum standard of living. This situation is summarised by HEPI and Loughborough University as follows:

There is no doubt the current financial assistance provided to students falls short, leaving them unable to achieve a satisfactory standard of living even with substantial part-time employment, which often conflicts with their academic performance (HEPI & Loughborough University 2024).

Some groups are more likely to be adversely impacted by the cost-living-crisis, including mature students, students with disabilities, black and minority ethnic

students, students from lower socio-economic backgrounds, care leavers and those estranged from their families (House of Commons 2025).

9.33. The evidence suggests that the cost-of-living crisis is negatively impacting the vast majority of students at some level across the UK, with potential consequences for their HE engagement, mental health and academic performance. Office for National Statistics (ONS) data from England show that 92% of students reported increased living costs year-on-year and 91% felt concerned about this. 78% feared cost pressures were harming academic performance, 35% felt less likely to pursue further study afterwards and 46% reported deteriorated mental health since the start of the 2022 to 2023 academic year (ONS 2023).

9.34. Research on the minimum income standard by HEPI and Loughborough University highlighted the following key points:

- Adjusting in line with rent prices in different parts of the UK, it is estimated that students need £18,632 a year outside London and £21,774 a year in London to reach a minimum income standard.
- This means that government maintenance support, provided to support students to meet their living costs, falls short, even for students receiving the maximum support available. The gap for students studying outside London is £8,405 if they are from England, £6,482 if they are from Wales, £7,232 if they are from Scotland and £10,496 if they are from Northern Ireland.
- For those studying outside of London, the maximum maintenance support in England covers just 55% of students' costs. The Welsh maintenance support covers 65%, Scottish support covers 61% and Northern Irish support covers just 44%.
- Even a student doing 10 hours a week of paid employment for the whole year and in receipt of the maximum maintenance support will not have enough money to cover their living costs. English students must work nearly 19 hours a week at minimum wage, Welsh students more than 14 hours, Scottish students 16 hours and Northern Irish students 23 hours to reach a minimum standard of living. By contrast, many universities recommend students should work no more than 15 hours during term time (HEPI & Loughborough University 2024).

9.35. Findings from a HEPI UK-wide student academic experience survey 2025 found that 68% of undergraduate students do paid work alongside their studies during term time. This has increased from 56% in 2024 and 42% in 2020 (HEPI 2025). Across the UK more students are engaging in work alongside full-time study to afford daily living, and this reality is described as 'the structural inadequacy of the student finance

system' whereby work has become a necessity for students (HEPI 2025). However, there remains a limited understanding of where students work, how they access roles and how these patterns differ across institutions (HEPI 2025).

9.36. There are substantial consequences to students' undertaking paid work at this level and a lack of understanding about the wider implications as highlighted in detail on a report on student working lives (HEPI 2025). The report claims that many students are doing an overall workload of over 50 hours a week when study, work and travel are accounted for. This is not something full time HE courses were originally designed to accommodate and impacts on the commitment students can realistically afford to their courses. HEPI states that:

the evolving nature of student lives also calls for regulatory attention, particularly where disparities in experience are evident. The Office for Students [England] currently addresses inequality of outcomes through its Equality of Opportunity Risk Register, which identifies cost pressures as a risk and a basis for interventions to support disadvantaged groups. However, this risk does not fully account for the combined impact of increased paid work hours and the quality of work on student outcomes, especially for those facing heightened financial pressures (HEPI 2025).

9.37. The direct implication around costs is clear, but there are indirect implications to this financial precarity that undermines student life and the ability of students to succeed in HE. These include the impact on students' mental health and wellbeing, the consequences on students' ability to participate in some aspects of university life, their overall university experience, the increased risk of dropping out and the high number of working hours when studying and working are combined which increases the risk of burnout, stress and disengagement from HE.

10. Emerging barriers

10.1. In addition to the structural barriers outlined above, there are a number of other barriers that are indirect, emerging and a consequence of recent events, such as the COVID-19 pandemic and the development and mainstreaming of AI. The social, economic and educational impacts of these contemporary significant and far-reaching issues are still emerging for young people and their journeys into HE. As far as the COVID-19 pandemic is concerned, the research to support the evaluation of the Diamond Reforms (Welsh Government 2026) states that educational ramifications include lower school attendance (that has impacted academic achievement and students' ability to meet university entry requirements), and a rise in behavioural and wellbeing issues. There has also been an increase in elective home education. Some of these issues have exacerbated existing inequalities within HE and highlighted the outdated nature of some HE courses and modes of delivery given the current day financial and other pressures young people are experiencing.

COVID-19

10.2. Literature suggests that the impact of COVID-19 on education and outcomes is still ongoing with the impacts still unfolding. The Russell Group 'Pathways for Potential' report 2023 states, 'the impact of the [COVID-19] pandemic on young people's learning will be felt for many years to come' (Le Carpentier 2023) and suggests that students from disadvantaged backgrounds were particularly affected. Literacy and numeracy benchmarks and attainment fell. The report said, 'key stage 2 attainment fell in every subject except reading between 2021 and 2022 and the gap in attainment between disadvantage students and their peers increased in 2020 and 2021 at key stage 4 and 16 to 19 education.' (Le Carpentier 2023). The IFS educational inequalities report attributes this to worse experiences with home learning, less access to resources at home during lockdowns and disadvantaged children more likely to be absent from school and for longer than children from more advantaged groups (Farquharson et al 2022).

Mental health

10.3. One aspect of the COVID-19 pandemic that is important for young people's educational journey to HE is the impact on their mental health and wellbeing. The COVID-19 Social Mobility and Opportunities (COSMO) study 'is the largest study of its kind into the effects of the COVID-19 pandemic and the cost-of-living crisis on the life chances of a generation of young people' (COSMO website 2026). A 2023 COSMO briefing on the physical and mental health of young people recognises that 'even though many areas of life have largely returned to normal following the pandemic, the long-term trend of worsening mental health and wellbeing of young people is an ongoing

issue' (Holt White et al 2023). The cohort in their research was asked whether COVID-19 is still having an effect on any part of their life, just over a third (33%) of young people said that COVID-19 was still having a negative impact on their education (Holt White et al 2023).

10.4. In 2024, the Welsh Government commissioned research to understand the impact of the pandemic on young people in post-16 education. They found that 52.9% of the 1,821 respondents either agreed or strongly agreed that their learning had been disrupted in the previous twelve months due to mental ill health (more than any other reason) (Welsh Government 2024). The research concluded that 'poor mental health and emotional wellbeing present a significant challenge amongst learners in post-16 education' (Welsh Government 2024). Indeed, a protocol scoping a review of trends, gaps and research directions on student mental health in UK higher education institutes states:

mental health challenges among students in UK higher education institutions have reached unprecedented levels, prompting urgent concerns across academic, clinical, and policy sectors. Across England, Scotland, Wales, and Northern Ireland, students are reporting high and increasing rates of depression, anxiety, psychological distress, self-harm, and suicidality. In 2022, the ONS reported that 37% of the students experienced moderate to severe symptoms of depression or anxiety—significantly higher than the general population of the same age group (Cogan et al 2025).

10.5. It is suggested that disruption to education, social isolation, financial strain, and heightened uncertainty have had a lasting impact on student wellbeing and this represents a significant barrier for young people in both accessing and progressing in HE. As reflected throughout this review, these challenges are not evenly distributed across different population groups and typically disadvantaged groups, including mature students, ethnic minority students, LGBTQ+ students, international students and neurodivergent students often face additional barriers that influence both mental health and their ability to access support (Cogan et al 2025).

10.6. It may be the case that these issues are filtering into choices made by young people about whether or not they want to pursue HE. As noted from the research conducted as part of the Diamond Reforms evaluation (Welsh Government 2026), there was a growing sense of uncertainty among young people about whether they want to participate in HE. Participants suggested that increasing numbers of young people are actively questioning whether university is the right choice for them and that:

not all concerns are financial. Interviewees described a rise in social anxiety among young people following the pandemic, including worries about leaving home, living independently, and managing academic workloads. Prospective

students are now asking more questions about mental health support, neurodiversity assessments, and wellbeing services: 'They're not just worried about money; they're worried about coping' (Welsh Government 2026).

- 10.7. A 2023 report produced by the Children, Young People and Education Committee in the Senedd, emphasizes the need for consistent mental health support in HE settings in Wales and recognizes that the transition to HE can lead to exacerbation of existing mental health issues as well as a need for immediate mental health support (Welsh Parliament 2023).

The value of higher education

- 10.8. Many of the factors highlighted in this report (and others) have led to well documented questions about the 'value' of university for an increasingly diverse pool of young people considering HE. It is claimed that some students with varying needs confront barriers that make the traditional full-time model inaccessible or extremely challenging. This may be due to a range of factors, such as caring responsibilities, disabilities, mental health, economic disadvantages, and being a member of an underrepresented ethnic group which make it harder to pursue the conventional route. The dominant model three-year full-time undergraduate degree model may not be suitable for many people who need more flexible options (HEFCW 2024).

- 10.9. Policy analysis from Wonkhe (2024) drawing on the HEFCW study that considered the diversity of HE delivery models in Wales, states:

...the higher education system's foundations were laid at a different time to address the needs of a different population cohort. While the three-year degree will remain central, expanding the range of alternatives is critical for promoting equitable access and fuelling Wales's economic and social ambitions (Wonkhe 2024).

- 10.10. In addition to this mismatch, the difficult financial climate for both students and universities may lead to a 'disconnect between expectations and reality [that] requires re-evaluating what students perceive as value in their university journey and how value can be delivered' (HEPI 2025). It is suggested that universities should consider new models of delivery to counter cost-of-living pressures and the reality of students having to work alongside studying. One example HEPI (2025) provide is 'the 'block approach' to teaching, a pedagogical model that restructures the academic calendar into shorter and more intensive modules focusing learning on fewer subjects at a time. It aims to increase operational efficiency and improve student continuation by enhancing focus and reducing cognitive overload. It also condenses the time students spend on campus, allowing them greater capacity to manage other responsibilities (HEPI 2025).

Guidance and information

- 10.11. An issue in Wales that is worth consideration when reviewing barriers is the relationship between universities and schools and the information and guidance available to prospective students. The Senedd in its research on routes into post-16 education and training found that the HE engagement with young people had declined recently due to reduced access to students in schools and colleges (Welsh Parliament 2025). The reason given was an overburdened curriculum where teachers and lecturers do not feel they can create spaces in timetables for universities to engage with prospective students. They stressed the importance of making young people aware of the opportunities presented by HE (Welsh Parliament 2025).
- 10.12. After the COVID-19 pandemic some university outreach and school-based guidance moved online, and it is suggested that this reduced the effectiveness for students with lower digital access or weaker school support (Office for Students 2020). In Wales research has shown that parents and carers need more support to help young people explore post-16 options. Findings from a national parent survey 2023, indicate that only 39% of parents in Wales with a young person in secondary or post-16 education agree that their child's school or college helps them to explore a broad range of career possibilities (Welsh Parliament 2025). The results from the Diamond reforms evaluation also indicate that people are finding information on student finance confusing (Welsh Government 2026). This combination of evidence suggests that different aspects of post-16 and HE information and guidance provision may be operating as a barrier to young people accessing the information they need to make choices about going to university. Although further research is needed to understand the relationship between different aspects and modes of university outreach, career and HE guidance, and the impact of digital access in this area on HE engagement.

AI and graduate jobs

- 10.13. The increased usage of AI tools that began at the end of 2022 marked the beginning of widespread use of AI around the world. It meant that employees now had the tools to write and summarise large documents quickly, analyse data, and perform numerous other cognitive tasks that previously required a human worker. This advancement has caused worry about the future of work, career pathways, unemployment, and economic disruption. As widespread AI use is still new, the full impacts of AI on work and the labour market are not yet clear.
- 10.14. A Kings College London study looked at the impact of large language models on the UK labour market by analysing millions of UK job postings (from 2021 to 2025). It found that 'entry-level roles fell by 5.8% at AI exposed firms and the impact was concentrated in junior

professional roles' (Tesselink 2025). This suggests that the graduate job market could be changing in part following the advancement of AI in the workplace, with claims that AI is re-shaping the labour market and is causing a reduction in graduate level roles. However other research highlighted in the UK Parliament briefing on AI and employment (UK Parliament 2025) refers to a 2025 report by McKinsey that suggested that reduced graduate employment in the UK is more likely to be caused by other reasons, such as rising employment costs.

- 10.15. There is uncertainty around how AI will impact the graduate job market; it may cause job losses, but it could also create new roles too. It is possible these developments are impacting young peoples' perceived value of HE, that is strongly associated with successful labour market outcomes and could operate as an indirect barrier through student perceptions and behavioural change.

11. Conclusions

- 11.1. This review has considered recent Welsh and UK evidence on the range of barriers that exist to hinder access to and progression in HE in Wales. It has found that the situation is highly complex and multilayered. There are long standing structural barriers such as persistent educational inequalities and a student finance system that does not allow for a minimum standard of living without recourse to paid work, operating in conjunction with more recent emerging barriers formed through large scale and far-reaching health, social, economic and technological developments.
- 11.2. The result is an altered HE landscape where this mix of barriers needs to be addressed in different ways to fit contemporary students' lives, well-being needs and labour market prospects. HEPI call for governments to acknowledge the financial realities of students' lives and align financial policy decisions with a minimum income standard for students (HEPI & Loughborough University 2024). IFS recognise that 'educational inequalities cannot be solved by the education system alone [as they are] a consequence as well as a cause of wider economic inequality' (Farquharson et al 2022).
- 11.3. In Wales there are particular barriers that are operating to limit HE participation particularly among young men. The evidence suggests that there are practical, cultural, geographical, financial, attainment and institutional barriers in Wales that impact the path to university for young people. Further research could investigate these areas in more depth separately to understand how these barriers are operating and how they could be addressed.

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