



# Preparing for hyper-diversity:

London's student population in 2030

**An AccessHE Report**

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## → Executive Summary

### 1. Why the report?

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We are witnessing hyper-diversity among the student body in London, where diversity is the norm and not the exception. Inequalities in entry to higher education (HE) – by socioeconomic position – are smaller in London, relative to the rest of the country<sup>1</sup>.

Moreover, the prevalence of students from different ethnic backgrounds, who are disabled and over the age of 21 is higher in London, relative to other parts of the country.<sup>2</sup>

This diversity looks like a permanent feature where students progressing to HE in London is concerned, but it is important to understand exactly how this diversity will develop, and what this means for the future student body.

### 2. What does the report examine?

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This report looks at trajectories of the younger student body (aged 18–24) entering HE from London over the next decade. The impact of varying trajectories of entry to HE, by ethnicity and socioeconomic position, on the composition of students by 2030 is explored.

Previously published data from the higher educational statistical agency (HESA), and Greater London Authority (GLA) intelligence, are employed to obtain data on entry rates to HE and expected demographic change.

Based on these data, we explore how increases in entry to HE vary by student ethnicity, and parents' educational background. We explore data produced from the Department for education, to forecast the proportion of future participation in HE among learners eligible for free school meals (FSM).

### 3. The Key Findings

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- The number of students aged 18–24 entering HE from London is projected to increase by over 50% from 2016 to 2030, with over 38,000 extra young students.
- Despite this large increase, for certain ethnic groups – Indian and Chinese – the numbers of students is forecast to fall due to lower population increases and because their entry rate has declined in recent years.
- The research forecasts over 10,000 more students from other (including mixed) and African backgrounds respectively by 2030.
- The number of white students will increase but by only 11%.
- Students of non-white ethnic background will constitute 74% of those entering HE by 2030.
- Nearly 60,000 of the students entering HE in 2030 from London (54%) will be the first in their family to go to HE.
- At present rates of progress, the percentage of learners from FSM backgrounds from London entering HE will reach 73% by 2030. This is 30% more than the next highest performing area – the West Midlands – and a full 50% more than the lowest performing area which is the East Midlands.
- If the rate of increase in those going to HE who are eligible for FSM continues, in 31 of the 32 local authority areas in London, over 50% of FSM learners will enter HE by 2030. In every inner London area over 60% of students eligible for FSM will enter HE.

1. Department for Education (2017) 'Widening participation in Higher Education'.

2. Tindell, G; Weeden, S, Storan J (2017) 'The Higher Education Journey of Young London Residents', Available at: <https://www.londoncouncils.gov.uk/our-key-themes/children-and-young-people/14-19-young-peoples-education-and-skills/types-0> (Accessed September 2018)

## 4. Implications and recommendations

It is predicted that London will become a truly 'hyper-diverse' space where HE is concerned by 2030 and student numbers from under-represented groups will increase. This does not mean, however, that there will not be students in London who could benefit from HE but who are not doing so. Almost a third of students in London did not achieve A\* to C in GCSE English and mathematics in 2015<sup>3</sup>. The prospective changes in the student population in London imply the need for actions from policymakers and HE providers. These recommended actions are described below:

- **Make the forecasts for diversity targets**

The default reaction to greater diversity, especially in HE, is to see it as leading to greater challenges that need to be addressed. It should be celebrated as one of the foremost achievements of HE and of the London education system. A straightforward way of doing this would be if HE providers and policymakers, particularly in London perhaps brought together by the Mayor's office, were to commit to make the forecasts for growth in HE participation by different ethnic & lower socio-economic groups actual targets to achieve by 2030.

- **Ensure provision is available for future HE students**

Existing data shows that around half of London domiciled students study in London, while over 40% of those who study outside the capital do so in the South East or the East of England. If numbers increase as predicted in this report (and there is evidence to suggest it is feasible they could increase at an even greater number), strategic planning is required to ensure that the needs of future students are met by high quality academic provision – particularly in the south of England.

- **Consider implications for different subject areas of future HE demand**

Evidence suggests that students from different ethnic groups may display different subject preferences. Hence, the changes forecast here may have implications for subject disciplines. A decline in graduates in certain areas, or a surplus in others, maybe a suboptimal outcome for HE. Where this is the case, actions need to focus on long-term outreach programmes to address this possibility.

- **Recognise the distinctiveness of the London HE sector**

This report further emphasises the distinct nature of London HE. This distinctiveness needs to be articulated and recognized to enable London to maximise its contribution to English HE. HE policy also needs to continue to recognize regional difference in how the sector operates and build this into policy making.

- **Develop learning and teaching for hyper-diversity**

The HE offer to students from London will need to evolve to meet the needs of this hyper-diverse student body. This will require major new research. Such a programme could be developed through the new widening access Evidence and Impact Exchange.

- **Support widening access across the student lifecycle:**

The last 15 years have seen London well served by several collaborative networks, both government and non-government funded, which support progression into HE for those from under-represented groups.

Over the next 15 years in the era of hyper-diversity, a new kind of collaborative network will be required which places equal emphasis on supporting learners into HE and enabling them to succeed achieve their potential when they enter HE.

3. Greater London Authority 'Annual education report 2017' available at: [https://www.london.gov.uk/sites/default/files/final\\_epi\\_edits\\_design\\_final\\_gla\\_annual\\_report\\_2017\\_0.pdf](https://www.london.gov.uk/sites/default/files/final_epi_edits_design_final_gla_annual_report_2017_0.pdf) (Accessed September 2018)

## → 1. Introduction

**It is a well established fact that London leads the way nationally in terms of the number of students entering higher education (HE) and the numbers entering from proxy measures of socio-economic background<sup>1</sup>. London also has by some distance the most students from different ethnic groups of any region in England.<sup>4</sup> When combined with the higher than average percentages of students who are classified as disabled, large numbers of students who are over the age of 21 and an increasing propensity of those studying in London to commute to their place of study<sup>5</sup> it is clear that London is going down a very different trajectory to that of the rest of the country. Indeed what we see in the capital is 'hyper-diversity';<sup>2</sup> where diversity in terms of those who progress to HE is the norm rather than the exception.**

This diversity looks like a permanent feature where students progressing to HE in London is concerned, but it is important to understand exactly how this diversity will develop. This report looks at how the numbers of younger students entering HE from London and their profile will change by 2030. Such information matters because diversity while an undoubted strength of the English HE system also presents challenges. Students from some black and minority ethnic backgrounds are more likely to not complete their studies<sup>6</sup>, significant gaps in academic performance between ethnic groups exist and research suggests that the student experience for those entering HE from less affluent backgrounds leaves much room for improvement<sup>7</sup>. Increases in student numbers, from different social groups, may also have a considerable impact on the public purse and the ability to support these students through the present student loan system.

Finally, as the biggest provider of young students in the country what happens in London influences national questions regarding the future nature of HE in England. The HE Policy Institute (HEPI) have produced several reports looking at future projections in HE participation over the last two decades.<sup>8,9</sup>

The latest of these reports released earlier this year argued that by 2030, the demand for HE in England may increase such that a further 350,000 additional student places are required. If the latest HEPI report is correct (or if there is an increase that anyway approaches these numbers)<sup>10</sup>, it will include a disproportionate number of students from London.

4. Greater London Authority 'Annual education report 2017' available at: [https://www.london.gov.uk/sites/default/files/final\\_epi\\_edits\\_design\\_final\\_gla\\_annual\\_report\\_2017\\_0.pdf](https://www.london.gov.uk/sites/default/files/final_epi_edits_design_final_gla_annual_report_2017_0.pdf) (Accessed September 2018)
5. HEFCE (2017) 'The geographical mobility of students' Available at: <http://www.hefce.ac.uk/analysis/maps/mobility/mobdata/> (Accessed September 2018)
6. Office for Students (2018) 'Differences in Student Outcomes', Available at <https://www.officeforstudents.org.uk/data-and-analysis/differences-in-student-outcomes/> (Accessed September 2018)
7. Department for Education (2016), 'Phonics screening check and key stage 1 assessments: England 2016' Available at: <https://www.gov.uk/government/statistics/phonics-screening-check-and-key-stage-1-assessments-england-2016> (Accessed September 2018).
8. Bekhradnia, B (2006) 'Demand for Higher Education to 2020', Available at <https://www.hepi.ac.uk/wp-content/uploads/2014/02/22DemandforHEto2020.pdf>
9. Bekhradnia, B (2003) Demand for HE to 2010: Some Political and Policy Implications, Available at <https://www.hepi.ac.uk/2003/09/29/demand-for-he-to-2010-some-political-and-policy-implications/> (Accessed September 2018)
10. Bekhradnia, B & Beech, D (2018) A https://www.hepi.ac.uk/wp-content/uploads/2018/03/HEPI-Demand-for-Higher-Education-to-2030-Report-105-FINAL.pdf (Accessed September 2018)

## → 2. How London leads the way

As Figure 1 shows, London has experienced higher levels of HE participation than any other part of the country since the late 1990s, but that gap has extended into the 2010s.<sup>11</sup>

**Figure 1: Young HE participation by region**

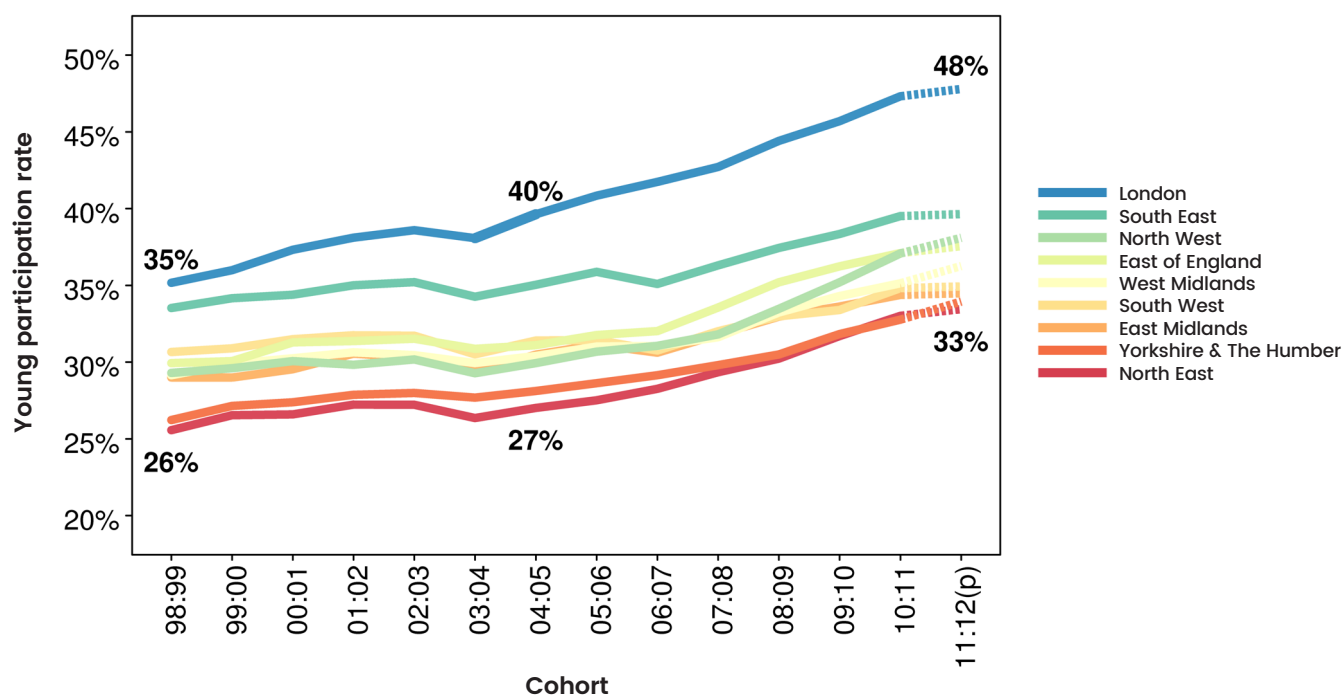
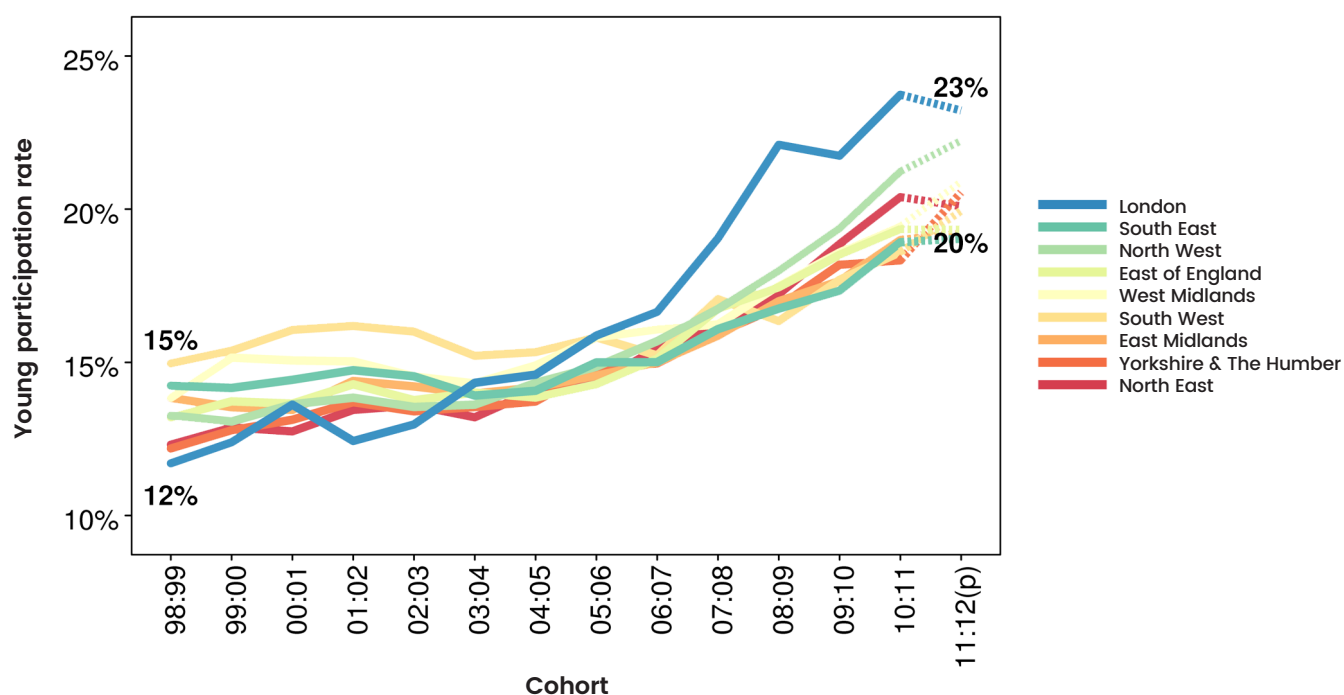


Figure 2 shows the differences between regions where participation in HE by the proxy measure of HE participation by socio-economic background designed by the Higher Education Funding Council of England (HEFCE) is concerned. The POLAR measure is a classification of small areas according to rates of young participation in HE. Wards are assigned into one of five groups or 'quintiles'. Quintile 1 contains areas with the lowest participation rates while Quintile 5 contains areas with the highest<sup>12</sup>.



The participation rates by younger learners in HE are such in London now, that with the present design of POLAR only 13 out of the 625 wards in the capital are deemed as low participation. This does not imply that participation is uniformly high across areas or social groups. However, it is certainly higher than other regions of the country.

The roots of London's higher rates in HE participation can be found in the impressive performance of its school system over the last 20 years. This performance is well documented but it is worth briefly pointing out its key features. Differences between London and the rest of the country begin in primary school. By the age of 6, a greater proportion of students meet the expected level of reading relative to their counterparts in other regions.<sup>8</sup> By age 11, at the end of primary school, 59% of students are meeting expected standards across Reading, Writing and Mathematics. The corresponding figure nationally is 53%.<sup>13</sup> In 2016, London had a higher attainment 8 score of (51.9) relative to the national average (50.1)<sup>14</sup> and a relatively higher than average proportion of students from London go on to education after the age of 16, compared to national rates of progression.<sup>15</sup>

The reasons that London has gone from the worst performing education region in the country to the best in little more than a generation have been debated extensively. Investment in initiatives such as the London Challenge under Labour in the 2000s, the ethnic diversity of the capital and the ability of London schools to attract 'better' teachers are all argued to have played a part.<sup>16 17</sup> The relative importance of these factors is hard to discern but research released by the Department of Education argues that there is an effect of being in London that can't be reduced to any one factor<sup>18</sup>:

**'we continue to observe a London Effect ..... confirming that factors beyond demography and socio-economic characteristics have a role in London's improved performance over time.'**  
Allison, (2018:4)

11. HEFCE (2013) 'Trends in young participation in higher education' – Available at [http://www.hefce.ac.uk/media/hefce/content/pubs/2013/201328/HEFCE\\_2013\\_28.pdf](http://www.hefce.ac.uk/media/hefce/content/pubs/2013/201328/HEFCE_2013_28.pdf) (Accessed September 2018)
12. HEFCE POLAR (2017) Available at: <http://www.hefce.ac.uk/analysis/yp/POLAR/> (Accessed September 2018)
13. Department for Education (2016), 'National Curriculum assessments key stage 2, 2016 (revised)' Available at: <https://www.gov.uk/government/statistics/national-curriculum-assessments-key-stage-2-2016-revised> (Accessed September 2018)
14. Department for Education (2017), 'Revised GCSE and equivalent results in England: 2015 to 2016', Available at: <https://www.gov.uk/government/statistics/revised-gcse-and-equivalent-results-in-england-2016-to-2017> (Accessed September 2018)
15. Department for Education (2017), 'Destinations of Key Stage 4 and Key Stage 4 pupils 2015', Available at: <https://www.gov.uk/government/statistics/destinations-of-ks4-and-ks5-pupils-2016> (Accessed September 2018)
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17. Baars, S, Shaw, B, Mulcahy, E & Menzies, L 'School cultures and practices: supporting the attainment of disadvantaged pupils' Available at <https://www.gov.uk/government/publications/school-culture-and-practice-supporting-disadvantaged-pupils> (Accessed September 2018)
18. Allison, R. (2018) Academic performance of disadvantaged pupils in and out of London: analysis Available at [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/730625/FINAL-RA\\_Data\\_Analysis\\_paper\\_for\\_publication.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/730625/FINAL-RA_Data_Analysis_paper_for_publication.pdf) (Accessed September 2018)



## → 3. How we have made our projections

**The purpose of this study is to better understand the future diversity of the students from London entering HE and also how the numbers entering HE may change by 2030. Taking our cue from the work of HEPI, highlighted above, the approach to understanding how the student population in London will change is one based on combining predicted rates of change in HE participation with expected demographic changes in the 18–24 year old age group. In order to calculate a valid HE participation rate, there is a need for time series data over a number of years. Using data from HESA, which has been previously analysed and published by London Councils in their 2017 report<sup>2</sup>, it was possible to establish HE participation rates for different ethnic groups, and by first generation HE status, for London-domiciled students aged 18–24<sup>2</sup>. Annual HE participation rates from 2008 to 2016 were used to establish a predicted future yearly participation rate for the period 2017 to 2030 for each ethnic group and by parental education status.**

Changes in participation are also affected by changes in the size of the population. Data from the Greater London Authority<sup>19</sup> was used to determine the proposed rate of demographic change to 2030 among all 18–24 year olds in London, and by ethnicity. The final prediction of numbers of students by the characteristics described above, is arrived at by combining the HE participation rate for the 2017 to 2030 period with the demographic change rate for the particular ethnic group over the period.

There are limitations in what can be done here. Time series data on older students is harder to find, and the demographic rate would have to be that of the whole population thus less accurate than that for the 18–24 group. Hence, the study looks at younger students only. This is a matter of expediency. It does not imply that the participation of older learners is less important. The decline in participation in HE by mature and part time learners represents a huge waste of potential and should be of highest policy priority. There has also not been any analysis done here by disability or by commuter status. Again, the data is not available to do this work by these dimensions of diversity. Our colleagues at London Higher will be producing work on the increasing rates of commuter students in London, and the effects of this on the student body, toward the end of 2018.

The other main limitation centres on understanding HE participation by socioeconomic background in London. As outlined above, London has very few officially designated areas of low participation. Less than 5% of wards in London are designated as 'low participation' in the POLAR measure. Hence, this measure does not act as a very good way of understanding HE participation in the future by socio-economic background. To gain further insights into the future where this dimension of diversity is concerned, then two different ways of measuring progression to HE by socio-economic background were used. The first is a measure of parental HE background which looks at whether the student is the 'first generation' to enter HE or not. Secondly, for several years, data has been produced by the government on HE participation by eligibility for free school meals (FSM). FSM itself as a measure of low income backgrounds is only partial and limited.<sup>20</sup> Nevertheless, it represents a marker that is commonly used in schools and does give additional insights into the nature of the young people entering HE from London. Hence, the following sections also include projections of rates of participation in HE by FSM for London and also boroughs within it by 2030. Demographic data on projected changes in the FSM population are not as readily available as for ethnic groups, thus the projections in this section are postulated without reference to demographic data.

19. GLA intelligence (2017) "2016-based Ethnic Group Population Projections" <https://files.datapress.com/london/dataset/2016-based-projections-documentation/2017-11-24T12:10:05.22/2016-based%20Ethnic%20Group%20Population%20Projections.pdf>

20. Taylor C (2017) 'The Reliability of Free School Meal Eligibility as a Measure of Socio-Economic Disadvantage: Evidence from the Millennium Cohort Study in Wales' Available at <https://www.tandfonline.com/doi/full/10.1080/00071005.2017.1330464> (Accessed September 2018).

## → 4. The demand for HE in London by 2030

### 4.1 HE participation by ethnic background in 2030

As outlined above, future projections in participation are calculated in the basis of demographic changes combined with the rate of HE participation. Table 1 depicts projected HE demand in 2030 on the basis of **demographic change alone**. It shows that, overall given the predicted increase in population there would be just over 11,500 extra students entering HE by 2030. The estimated number of students<sup>2</sup> in 2016 overall was around 68,000. A 17% increase in the young population to 2030 would mean that demographic change would mean an estimated number of students of almost 80,000 learners.

**Table 1: Projected student numbers (aged 18–24, domiciled in London) based on expected changes in demography between 2016–2030.**

Characteristics	Estimated student numbers in 2016 <sup>a</sup>	Expected demographic change in by 2030 <sup>b</sup> (%)	Resulting change in numbers by 2030 <sup>c</sup>	Expected number of students in HE by 2030, based on projected demographic change <sup>d</sup>
All	68000	17	11560	79560
All	67020*		13889	80909
White	25115	11	2763	27878
Bangladeshi	3440	40	1376	4816
Indian	4950	15	743	5693
Pakistani	3000	35	1050	4050
African	11450	27	3092	14542
Caribbean	3715	-0.04	-1.50	3714
Chinese	855	7	60	915
Other (including mixed)	9150	37	3385	12535
Other Asian Background	4475	23	1029	5504
Other Black Background	870	45	392	1262

<sup>a</sup> Estimated number of students in HE in 2016. Figures obtained from "The Higher Education Journey of Young London Residents" report<sup>3</sup>;

<sup>b</sup> Projected percentage change in demography of 18–24 year olds between 2016–2030, obtained via Greater London Authority (GLA) Intelligence. Projected change in 18–24 year olds is given by ethnicity.

<sup>c</sup> Expected change in student numbers based on demographic change (percentage demographic change between 2016–2030 \* estimated student numbers in 2016)

<sup>d</sup> Estimated student numbers in 2030 based on projected change in demography;

\* Students for whom ethnicity could not be identified are excluded from this total. Therefore, numbers are less than total estimated student number in 2016, (68000)

However, investigating these increases in participation by ethnic background shows that demographic changes impact differently by ethnic group. While white students will continue to constitute the largest group of students by far, the highest population changes are among the Pakistani and Black (Other) students. This feeds through into increases in their relative share of the student population.

When demographic change and the rate of change in HE participation on the expected student population are brought together, the changes in the composition, and diversity, of the students entering HE from London by ethnic group become even more pronounced. Table

2 shows that there will be a projected increase in students aged 18–24 of over 50% from 2016 to 2030. But despite this large increase, for certain ethnic groups – Indian and Chinese – the numbers of students will actually fall. In contrast the numbers of students from other (including mixed) and African backgrounds is forecast to increase by over 10,000 in each category respectively. An increase in the number of white students is predicted but the increase is one of the lowest of all groups due to a combination of lower than average increases in the population and a yearly participation rate change which on the basis of the experiences of the 2008 to 2016 period, is slightly in decline.

**Table 2: Projected student numbers (aged 18–24, domiciled in London) based on expected changes in HE and demography between 2016–2030**

Characteristics	Estimated student numbers in 2016 <sup>a</sup>	Expected demographic change by 2030 <sup>b</sup>	Resulting change in numbers due to demographic change, by 2030 <sup>c</sup>	Expected number of students in HE by 2030, based on projected demographic changed <sup>d</sup>	Expected change in HE participation to 2030 based on rate of entry in to HE between 2008–2016 <sup>e</sup>	Total projected change Addition of demographic change plus entry rate <sup>f</sup>	Resulting change in numbers due to demographic change and HE entry, by 2030 <sup>g</sup>	Expected number of students in HE by 2030, based on projected demographic change and HE entry <sup>h</sup>
Ethnicity		(%)	(%)		(%)	(%)		
All	67020		13889	80909			38090	105110
White	25115	11	2763	27878	–0.25	11	2763	27878
Bangladeshi	3440	40	1376	4816	110	150	5160	8600
Indian	4950	15	743	5693	–33	–18	–891	4059
Pakistani	3000	35	1050	4050	46	81	2430	5430
African	11450	27	3092	14542	67	94	10763	22213
Caribbean	3715	–0.04	–1.50	3714	18	17	632	4347
Chinese	855	7	60	915	–42	–35	–299	556
Other (inc. mixed)	9150	37	3385	12535	89	126	11529	20679
Other – Asian	4475	23	1029	5504	96	119	5325	9800
Other – Black	870	45	392	1262	33	78	679	1549

a Estimated number of students in HE in 2016. Figures obtained from "The Higher Education Journey of Young London Residents" report3; Students for whom ethnicity could not be identified are excluded from this total. Therefore, numbers are less than total estimated student number in 2016, (68000).

b Projected percentage change in demography of 18–24 year olds between 2016–2030, obtained via Greater London Authority (GLA) Intelligence. Projected change in 18–24 year olds is given by ethnicity.

c Expected change in student numbers based on demographic change (percentage demographic change between 2016–2030 \* estimated student numbers in 2016)

d Estimated student numbers in 2030 based on projected change in demography

e Projected percentage change of HE entry to 2030. Participation rate is calculated by ascertaining yearly change in HE participation between 2008–2016, and then multiplying the yearly percentage by 14 to project to 2030

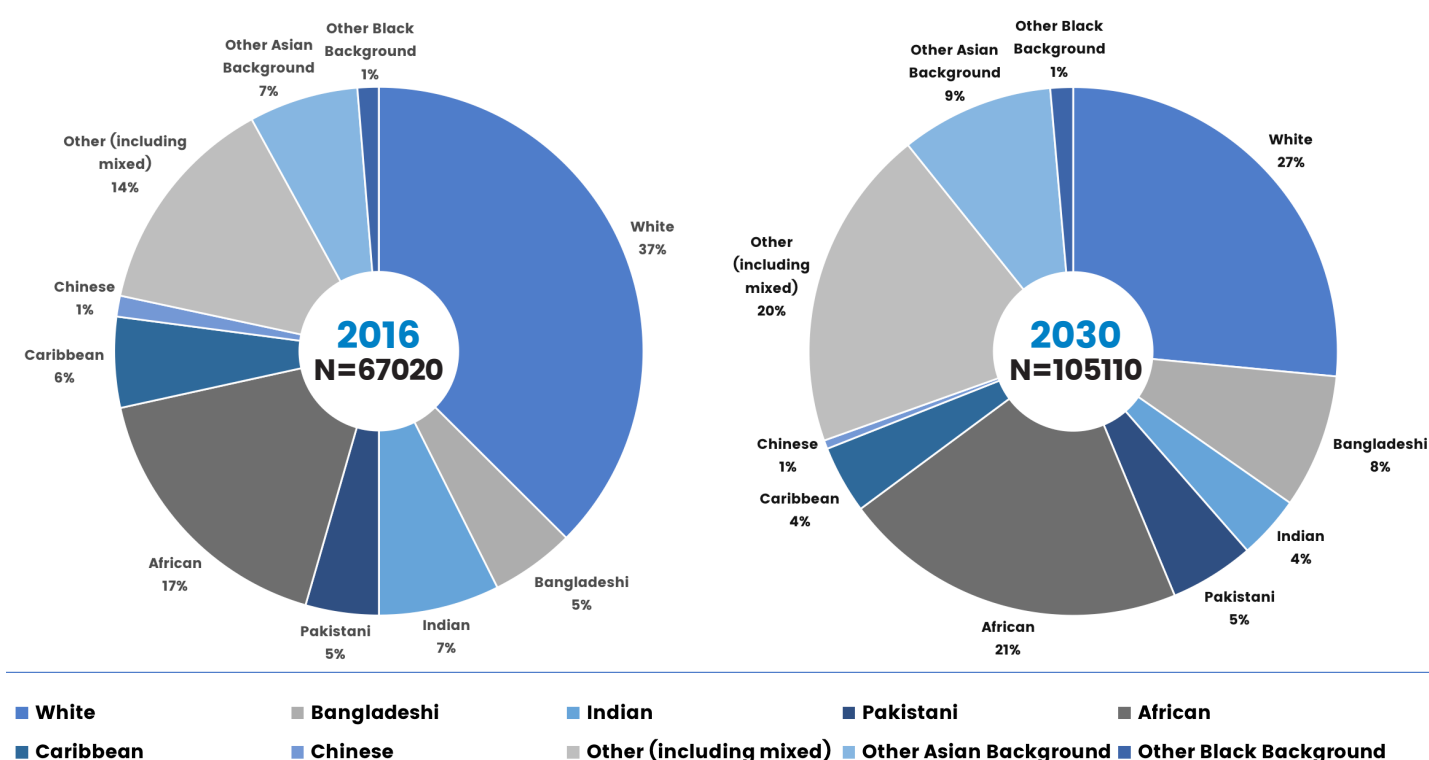
f Addition of overall projected percentage change in HE Entry and demography to 2030.

g Expected change in student numbers based on projected percentage in HE entry and demography to 2030.

h Estimated number of students in HE in 2030 based on projected change in HE entry and demography.

The implications of the changes in participation by ethnic background described in Tables 1 and 2 above, are that the composition of the students entering HE from London in 2030 will differ somewhat from that in 2016. Figure 3 shows, most striking is the drop in share of white students from 37 to 27%. In addition, while the proportion of Indian students was higher than the proportion of students from Pakistani and Bangladeshi Backgrounds in 2016, the reverse was forecast to be true in 2030. Finally, the proportion of Other Asian students – equal to Indian students in 2016 – is forecast to be higher by 5% in 2030.

**Figure 3: A comparison of the composition of the student body (aged 18–24) by ethnicity, in 2016 and 2030**



## 4.2 HE Participation by measures of socio-economic background

In this section, the first measure considered is participation by first generation and non first generation students from London. Over the period 2008 to 2016, the number of young people who are the first in their family to go to onto HE increased at a much faster rate (79%) relative to those whose parents have engaged in HE (48%).

Table 3 depicts the impact of both demographic change and the rate of change in HE participation by first-generation HE status, on the expected student population in 2030. Demographic data specific to whether a student is first generation or not, is not available. Therefore, the expected rate of change for 18 year olds overall is used which is 17%. Table 3 shows that there will be over 50,000 students entering HE from London in 2030 who will be first generation.

**Table 3: HE participation amongst 18–24 year olds (by socioeconomic position) from London in 2030 combining demographic change and HE participation rate**

Characteristics	Estimated student numbers in 2016 <sup>a</sup>	Expected demographic change by 2030 <sup>b</sup> (%)	Resulting change in numbers due to demographic change, by 2030 <sup>c</sup> (%)	Expected number of students in HE by 2030, based on projected demographic change <sup>d</sup>	Expected change in HE participation to 2030 based on rate of entry in to HE between 2008–2016 <sup>e</sup> (%)	Total projected change Addition of demographic change plus entry rate <sup>f</sup> (%)	Resulting change in numbers due to demographic change and HE entry, by 2030 <sup>g</sup>	Expected number of students in HE by 2030, based on projected demographic change and HE entry <sup>h</sup>
All	55990 <sup>i</sup>		9516	65506			45184	101174
First gen HE	28355*	17	4820	33175	79	96	27221	55576
Not first gen HE	27635	17	4696	32331	48	65	17963	45598

## 4.22 HE participation by FSM background

The educational attainment of learners from FSM backgrounds in London has been a point of interest for policymakers and commentators. In inner London the educational attainment of learners at GCSE exceeds that for non FSM learners in many areas of the country.<sup>1</sup>

This gap in educational outcomes however, becomes even more pronounced where entry into HE is concerned. Figure 4 shows time-series data of the proportion of students eligible for FSM at age 15 entering HE between the years 2007 and 2030. The projections for the 2016 to 2030 period are based on the rate of increase in participation in HE by FSM eligible learners between 2007 and 2015. Figure 4 shows that at present rates of progress, the percentage of learners from FSM backgrounds from London entering HE will reach 73% by 2030. This is 30% more than the next highest performing area – the west Midlands – and a full 58% more than the lowest performing area which is the east Midlands.

At this point, it is important to consider whether there will be some form of upper limit in HE participation by FSM eligible learners. The following section discusses in more detail whether such a slowing down of progress or even reversal could occur, and how likely it is. However, it is worth pointing out that the pattern of progress while slowing down over the 2012 to 2015 period has still been upward so while participation may not reach nearly 75% by 2030, on the basis of past experience it looks like it will still be significantly higher by 2030.

<sup>a</sup> Estimated number of students in HE in 2016. Figures obtained from "The Higher Education Journey of Young London Residents" report. Students for whom parental engagement in HE was not identified were excluded from this total. Therefore, numbers are slightly less than total estimated students in 2016, (68000)

<sup>b</sup> Projected percentage change in demography of all 18–24 year olds between 2016–2030, obtained via Greater London Authority (GLA) Intelligence. Projected change in 18–24 year olds was not available by whether students' parents had attended university.

<sup>c</sup> Expected change in student numbers based on demographic change (percentage demographic change between 2016–2030 \* estimated student numbers in 2016)

<sup>d</sup> Estimated student numbers in 2030 based on projected change in demography.

<sup>e</sup> Projected percentage change of HE entry to 2030. Participation rate is calculated by ascertaining yearly change in HE participation between 2008–2016, and then multiplying the yearly percentage by 14 to project to 2030

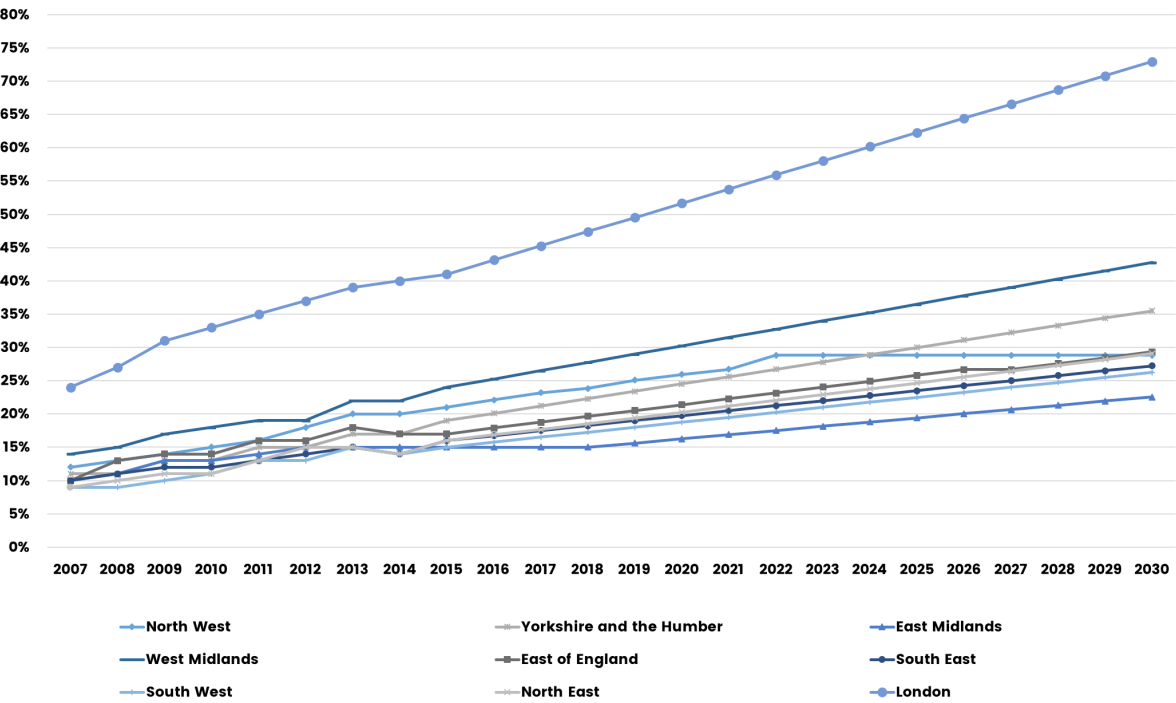
<sup>f</sup> Addition of overall projected percentage change in HE Entry and demography to 2030.

<sup>g</sup> The number by which the student population is expected to increase by, based on projected change in HE entry and demography to 2030.

<sup>h</sup> Estimated number of students in HE in 2030 based on projected change in HE entry and demography.

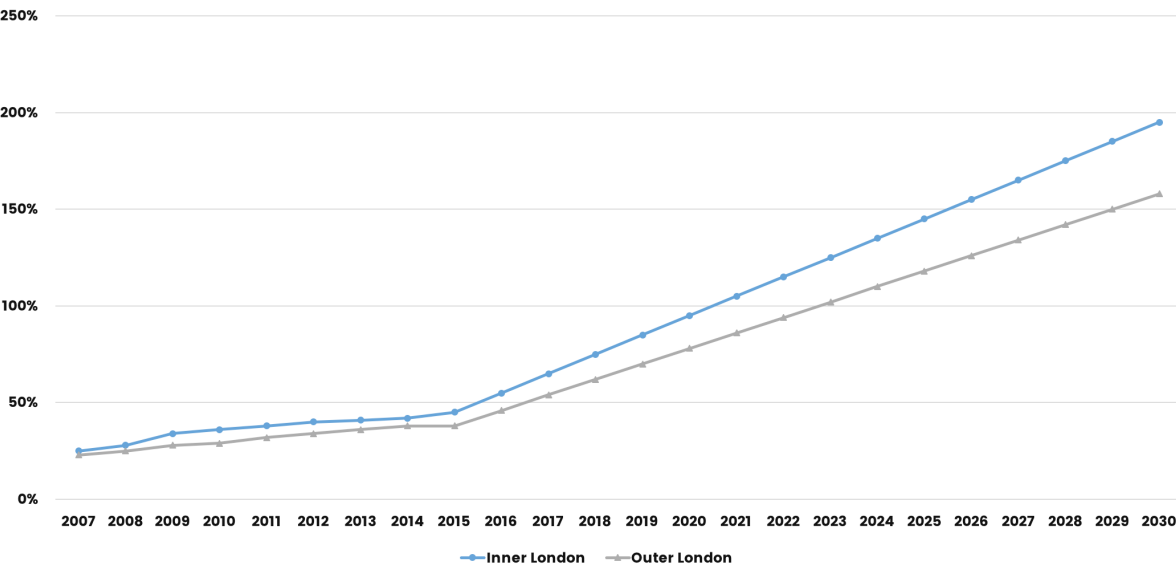
<sup>\*</sup> Students for whom parental education status could not be identified are excluded from this total. Therefore, numbers are less than the total estimated student number in 2016, (68000)

**Figure 4: Projected proportion of FSM-eligible students entering HE up to 2030 by age 25, by region.**



While progress across London is very impressive and looks like it will continue to be so in terms of this dimension of diversity, this progress also differs across the capital. As Figure 5 shows, from 2007 there has been widening of the gap in HE participation between inner and outer London which is only forecast to increase by 2030.

**Figure 5: Projected Proportion of FSM eligible student from London entering HE by 25 by 2030 by inner and outer London**



More detailed exploration illustrates differences in FSM-eligible learners entering HE up to 2030, within London.

Table 4 below outlines recent HE participation data for FSM learners by local authority in London, and how these rates of participation are expected to change in 2030. What is noticeable is that for nearly every area the rate of participation will exceed 50% by 2030. In inner London, for some areas it will be over 70% and in Westminster the prediction on present rates of increase is that participation will reach 100%. The table shows though that there is variation across the capital in terms of HE participation for FSM eligible learners.

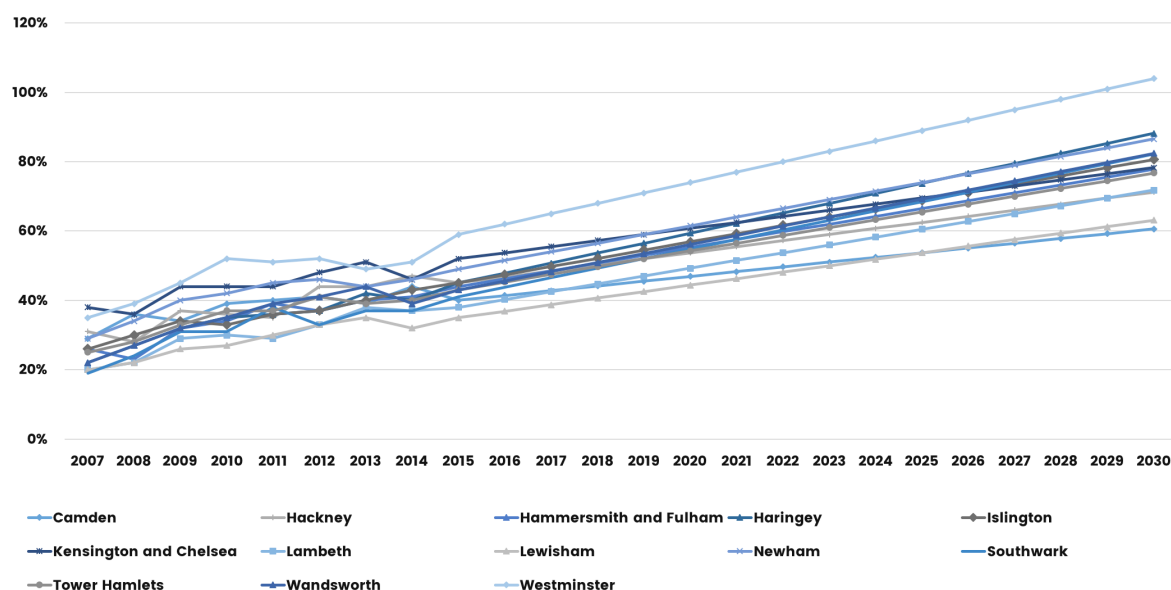
**Table 4 – Proportion of students eligible for FSM at age 15, in HE by age 25, by local authority areas in London**

<b>Inner London</b>	<b>2007</b>	<b>2015</b>	<b>2030*</b>
Camden	29%	40%	61%
Hackney	31%	45%	71%
Hammersmith and Fulham	26%	44%	78%
Haringey	22%	45%	88%
Islington	26%	45%	81%
Kensington and Chelsea	38%	52%	78%
Lambeth	20%	38%	72%
Lewisham	20%	35%	63%
Newham	29%	49%	87%
Southwark	19%	41%	82%
Tower Hamlets	25%	43%	77%
Wandsworth	22%	43%	82%
Westminster	35%	59%	104%
<b>Outer London</b>	<b>2007</b>	<b>2015</b>	<b>2030</b>
Barking and Dagenham	17%	33%	63%
Barnet	27%	44%	76%
Bexley	11%	27%	57%
Brent	32%	46%	72%
Bromley	15%	27%	50%
Croydon	21%	34%	58%
Ealing	30%	46%	76%
Enfield	25%	44%	80%
Greenwich	17%	30%	54%
Harrow	27%	47%	85%
Havering	10%	16%	27%
Hillingdon	18%	31%	55%
Hounslow	26%	47%	86%
Kingston upon Thames	22%	32%	51%
Merton	22%	35%	59%
Redbridge	35%	50%	78%
Richmond upon Thames	19%	30%	51%
Sutton	19%	28%	45%
Waltham Forest	26%	38%	61%

\* Projections were made on the basis of trends observed between 2007 & 2015

Figures 6 and 7 show the progress in HE participation forecasts for FSM eligible learners for inner and outer London boroughs respectively. The purpose of showing these figures is to illustrate that over the 2017–2015 period, progress in participation of learners has not been linear. In some years it has actually declined, so it is subject to fluctuation and these fluctuations may temper progress over time. Certainly the reality from 2015 to 2030 is unlikely to resemble the smooth upward trends of Figure 3 and 4. However, both figures also show that the overall trends since 2007 have been decidedly upward and on present evidence we would have to expect further increases to some extent up to 2030.

**Figure 6: Proportion of FSM eligible student from London entering HE by 25 by 2030 from inner London**



**Figure 7: Proportion of FSM eligible student from London entering HE by 25 by 2030 from outer London**

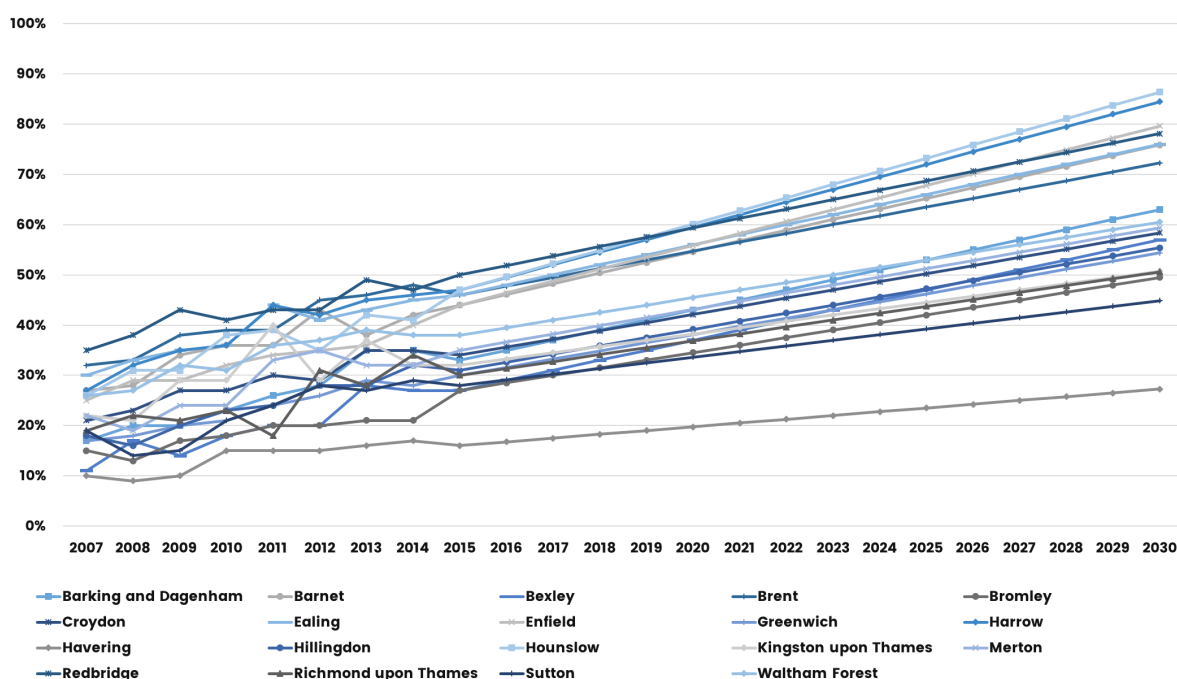




Table 5 shows the participation of FSM-eligible students entering HE from the 5 highest and 5 lowest participation areas in the country. It is evident that top 5 best performing local authority areas are all from London. Projected proportions of FSM-eligible students in HE to 2030 (based on rate of change between 2007 and 2015) are also shown.

The differences between HE participation among FSM-eligible students in high and low performing areas is expected to grow substantially over up to 2030. In 2015 there was a difference of 41% in HE participation by FSM eligible students between Westminster and Portsmouth. The corresponding difference for 2030 is expected to be 87%

**Table 5: Participation in HE by age 25 amongst FSM eligible learners selected local authority areas**

Highest proportion of FSM-eligible students in HE by 25	Participation in HE by age 25, among FSM eligible students in 2015 (%)	Projected rate to 2030 (%)
Westminster	52	100
Kensington and Chelsea	44	78
Redbridge	41	78
Newham	42	87
Hounslow	38	85

Lowest proportion of FSM-eligible students in HE by 25	Participation in HE by age 25, among FSM eligible students in 2015 (%)	Projected rate to 2030 (%)
Barnsley	9	17
Shropshire	10	14
East Sussex	10	14
Nottinghamshire	11	17
Portsmouth	11	13

## → 5. What might change by 2030?

**The forecasts made in section 4 are made on the basis of existing data and trends. Much may occur to disrupt these predictions. There are broad macro level policy changes which may affect participation – most obviously changes to the student finance regime.**

**HE participation in London for younger students does not appear to have declined overall since the rise in tuition fees in 2012 and abolishment of grants. However, this does not preclude the possibility that prospective students were deterred from entering. The possibility of reduction or abolition of fees, has been discussed by the major political parties. Assuming a reduction or abolition of fees does not come together with controls on student numbers, there could be a greater increase in students entering HE by 2030 than forecasted in section 4.**

**The section below focusses on two areas more specific to London – both of which may change the forecasts in section 4.**

### 5.1 More vocational alternatives to HE?

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In itself, vocational alternatives to HE are not specific to London. The drive to create a stronger vocational route for young people has been a national imperative since the mid 20<sup>th</sup> century. The most recent manifestation of this commitment are the new T-Levels<sup>21</sup> and investment in extending the numbers of young people entering apprenticeships<sup>22</sup>. The new T-Levels are an attempt to construct a more coherent 'alternative technical route' for students aged 16–18. T-Levels will combine classroom or workshop-based learning with 'on-the-job' experience across 11 industrial areas. T Levels are being introduced in phases starting from 2020 to 2021. As part of the proposals for T-Levels, the future of 'applied general' qualifications such as BTECs is uncertain, as they may not fit with the goal of creating parallel routes through and out of the 16–19 phase along academic and vocational lines.<sup>21</sup>

If T-Levels were to be successful in becoming the prestigious route through 16–19 that many feel has always been missing in England, and this was combined with the immiseration of applied general qualifications, then this would in all likelihood lead to lower HE participation than projected in Section 4. Over 9000 learners in London progressed to HE holding Level 3 (non A-level) qualifications in 2015 which represents a 77% increase from 2011<sup>23</sup>. However, at present there are doubts being expressed about the viability and impact of T-Levels which cast doubt on their ability to become this prestigious route.<sup>21</sup>

With apprenticeships there is certainly the room for impact in London. From 2010–11 to 2015–16 only the north east had a lower number of overall apprenticeship starts per year than London.<sup>22</sup> However, reversing this trend will not be easy and will require significant efforts regionally although there is a new skills strategy for London which may be able to impact on this issue.<sup>24</sup>

21. Department for Education 'Implementation of T-Level programmes Government consultation response', 2017

22. Economy committee (2017) 'Apprenticeships: An un-level playing field' Available: Holding the Mayor to account and investigating issues that matter to Londoners Available at (Accessed September 2018)

23. Greater London Authority (GLA) 'Skills for Londoners' Available at: [https://www.london.gov.uk/sites/default/files/economy\\_committee\\_apprenticeship\\_report.pdf](https://www.london.gov.uk/sites/default/files/economy_committee_apprenticeship_report.pdf) [https://www.london.gov.uk/sites/default/files/sfi\\_strategy\\_final\\_june\\_20186.pdf](https://www.london.gov.uk/sites/default/files/sfi_strategy_final_june_20186.pdf) (Accessed September 2018)

24. HEFCE (2015) Young participation in higher education – A-levels and similar qualifications Available at <http://www.hefce.ac.uk/analysis/yp/ypalevel/Age/>, (Accessed September 2018)

## 5.2 London's unfulfilled potential?

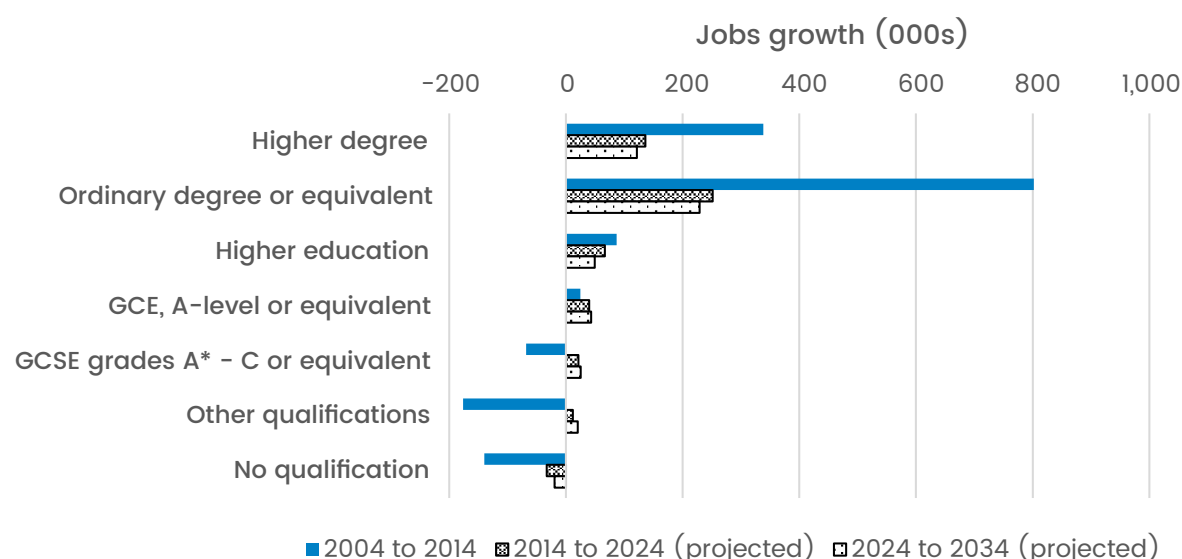
London may have large numbers of its young people entering HE, but it also has large numbers of young people not entering HE. Almost a third of students failed to meet the A\* to C threshold for GCSE English and Mathematics in 2015.<sup>4</sup>

Moreover, London was also behind the national average in pupil progress in secondary school attainment among FSM eligible students, and those whose first language is English.<sup>4</sup> Nor does London necessarily send all their students with Level 3 qualifications into HE. Research suggests that while nearly 75% of such students do enter HE, slightly more enter HE in three other areas of the country<sup>23</sup>.

It appears that at a number of points there is room to improve the educational outcomes for young Londoners. If these outcomes could be addressed and, in particular, if vocational routes are not strengthened, then it is feasible to suggest that more students could enter HE than predicted in Section 4.

Finally, the demand for HE qualified learners in London is set to increase up until 2030 as Figure 8 below shows. While not all learners qualified to enter HE do so in London HE providers, and many non Londoners will take these opportunities, Figure 8 shows that there will be continued need for degree level qualified workers in the capital<sup>25</sup>. Hence, pressures will continue to exist to meet the challenges regarding attainment above and produce more young people from London with degree level qualifications.

**Figure 8: Projections of London labour demand by qualification level from Greater London Authority**



25. Greater London Authority (2018) Skills strategy for Londoners: Evidence base, London:GLA

## → 6. Conclusions

**This report shows that based on existing evidence we can expect a significant increase in the number of young students entering HE by 2030, and an increase in the diversity of these students. Bringing together expected rates of HE participation and demographic change the forecast is that the number of young learners entering HE from London will increase by over 50%. This group will become more diverse with nearly 75% being non-white, the majority first generation and from some parts of the capital well over 50% of FSM eligible learners at 15 entering HE by the age of 25.**

These forecasts are subject to disruption by a range of factors which may originate at the national or local level. However, it should not be assumed that these factors will necessarily moderate the forecasts made here. While the examination results for young people in London out-perform the rest of the country, this does not mean that there is not continued room for improvement. There are many young people in London who do not do well enough at Level 2, and the progression through Level 3 could be improved. If the outcomes for these learners could be enhanced then the HE participation rate may be higher. Recognising that there are many young people who are not reaching their potential in the capital is crucial. The forecasts in this report should not be seen as a sign that there is no work to do where widening access to HE is concerned in London

However, even given the limitations in any attempt to forecast future HE participation, it appears almost certain that the students entering HE from London will come from more diverse backgrounds. Given this likelihood this section contains 6 recommendations for policymakers and HE institutions:

### • Make the forecasts for diversity targets

The default reaction to greater diversity, especially in HE, is to see it as leading to greater challenges that need to be addressed. Supporting students from different backgrounds to succeed is crucial and strategies to enable this to happen are described below. However, the risk then is diversity is immediately seen as a weakness and not a strength. It is perceived as a problem to deal with, rather than evidence of the success of HE as a space where those from different backgrounds can come together, learn and succeed. Rather, it should be celebrated as one of the foremost achievements of HE and of the London education system. A straightforward way of doing this would be if HE providers and policymakers, particularly in London perhaps brought together by the Mayor's office, were to commit to make the forecasts for growth in HE participation by different ethnic & lower socio-economic groups actual targets to achieve by 2030. This would do much to signal to learners from diverse social backgrounds that they were welcome in HE, rather than a burden to be tolerated.

### • Ensure provision is available for future HE students

Existing data shows that around half of students overall entering HE who are domiciled in London study in London, while over 40% of those who study outside the capital do so in the South East or the East of England.<sup>5</sup> Hence, if these trends remain the case and we wish to meet the demands of students it is important that HE provision is available in these areas. Equally, the growth in students entering HE from London may present an opportunity for those outside the capital to offer provision. What is important is to ensure that more sluggish short term growth in student numbers up to the early 2020s as there are fewer young people, does not compromise the capacity available to meet future demand for HE from London young people.

### • Consider implications for different subject areas of future HE demand

Existing data suggests that students from different ethnic groups may display different subject preferences.<sup>26</sup> Work undertaken by AccessHE looking at the composition of students entering arts & creative courses for example in 2016 showed very large disparities in participation by ethnic background.<sup>27</sup>

Again, as with HE capacity overall it is important to think strategically about the impact on the demand for different subject disciplines, particularly within London HE providers, of the forecasts in section 4. If the forecast trends lead to a decline in graduates in certain areas, or a surplus in others and this is a sub-optimal outcome for HE, the society or the economy then action to address that is required now. Subject preferences are established while students are in school, and if they are located in the contexts of culturally based views of what constitutes 'good jobs', they will not be easily affected. Indeed students of BAME backgrounds report that career prospects from art programme are considered poor in their communities. Long term outreach work done sensitively with learners from primary level will be required.

### • Recognize the distinctiveness of the London HE sector

This report re-inforces the argument regarding the distinctive nature of the HE landscape in London. It adds to what we know regarding the nature of HE provision, research and internationalisation to portray a HE system in the capital which differs significantly from that in other regions. This distinctiveness needs to be articulated and recognized to enable London to maximise its contribution to English HE. This articulation can only be done collaboratively, hence the need for an organisation like London Higher. The Office for Students also needs to recognize that there are regional differences in HE across England and build this regionalism into its policymaking.

### • Develop learning and teaching for hyper-diversity

The HE offer to students from London will need to evolve to keep pace with the changing nature of this group. Recent evidence has pointed to inequalities in HE outcomes related to ethnic background, and the calls to examine ethnocentrism in the curriculum have intensified. The research undertaken by AccessHE with BAME students pursuing arts & creative courses in 2016 suggested that attempts to introduce work from artists of backgrounds other than European were often overlooked, or tokenistic.<sup>27</sup> Moreover, there is a dissatisfaction with lack of representation of BAME communities at the lecturer level. This report should establish the case for a major new research programme possibly through the prospective Office for Students funded Evidence and Impact Exchange which looks at how to deliver learning and teaching in partnership with students in the 'hyper-diverse' context.

### • Support widening access across the student lifecycle

As London becomes an increasingly diverse HE environment in the context of England, and one of the most diverse HE spaces in the world, networks to enable and support this diversity become a required part of the HE landscape. Collaboration across sectors involving operational and strategic actors is essential to ensure that the thousands of students from all backgrounds entering HE from London achieve their potential. The last 15 years have seen London well served by several collaborative networks, both government and non government funded, which support progression into HE for those from under-represented groups. The next 15 years in the era of hyper diversity will require a new kind of collaborative network which places equal emphasis on supporting learners into HE and through to achieving their potential. AccessHE will be working over the next 12 months with its partners to understand how to best offer this kind of network support.

26. Universities UK (2015) 'Patterns and trends in higher education' Available at <https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/2015/patterns-and-trends-2015.pdf> (Accessed September 2018)

27. Alberts, N; Atherton, G (2016) 'The more colours you add, the nicer the picture.', Available at: <https://www.accesshe.ac.uk/yYdx0u7/The-more-colours-you-add-AccessHE-Creative-report.pdf> (Accessed September 2018)





## About AccessHE

Founded in 2011 and a key division of London Higher, AccessHE is the pan-London organisation that aims to support the progression of under-represented groups to higher education (HE). It does this by enabling HE institutions (HEIs), schools and colleges to achieve their objectives on widening access to HE more efficiently and effectively.

For more information on AccessHE please go to [www.accesshe.ac.uk](http://www.accesshe.ac.uk)

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