

# LIVING AND LEARNING IN 2034

A HIGHER EDUCATION FUTURES PROJECT



INTRODUCTION	Page 3
PROJECT TEAM	Page 5
ABOUT THE RESEARCH	Page 5
TEN TRENDS WITH THE POWER TO SHAPE LIVING AND LEARNING IN UK HE	Page 6
THE HIGHER EDUCATION ECOSYSTEM IN 2034	Page 8
STUDENT LIFE IN THE UK IN 2034	Page 11
USING THIS RESEARCH	Page 17
REFERENCES	Page 19

MARK ALLAN

As a business that has invested £2.5 billion in student accommodation since 1991 and still invests over £100 million each year, undertaking a project that helps us understand the future of the higher education sector with more clarity seemed like the obvious thing to do. Students are our business, and we can only be successful in meeting their accommodation needs if we keep pace with how they want and need to live.

There are already a number of reports and studies looking at the future of the higher education sector in the UK. Given the uncertainty and change we have lived through recently, it is not surprising that the HE sector has turned its creativity and capacity for research onto itself. However, we are not aware of any studies that focus on the wider, non-academic student experience, asking how students might live in the future, as well as how they might learn.

Accommodation meets students' most basic needs, providing a platform from which they can develop as scholars and individuals. I believe accommodation has the potential to enhance the student experience even further, but it can only do this based on a very deep understanding of how students want and need to learn, and how the HE sector is responding to wider changes in the economy and society.

I was keen that our in-house team should not embark on this project in isolation from the HE sector and so am very grateful to University Alliance for their involvement as partners throughout the process. Their leading edge, sector-wide *university\_vision* project has provided a solid base of data and consultation on which to develop conclusions about student living. In the latter part of the project we have also benefitted greatly from the insights and editing skills of Martin Hughes, author of The University Blog.

I believed it vitally important to include the views of current students, and would like to thank the students who gave significant input at two key points in the project. Lastly, but by no means least, the consultants from Ash Futures and Waverley Consulting provided considerable expertise in scenario planning and a comprehensive knowledge of global long-run trends. Their leadership of the scenario planning process and their comprehensive reporting was outstanding.

I am proud to present what we believe is the first futures project on student living in the UK. I hope it will be of value and interest to universities and students alike, and to the growing number of wider stakeholders involved in the sector. As well as being a record of our thinking and analysis over the last year, it is also an invitation to debate the issues raised, and to talk not just about the future that we expect, but about the future we choose to create for – and with – the next generation of students.



**Mark Allan, Chief Executive of UNITE Group**

# INTRODUCTION

STEVE WEST

The challenges and changes facing higher education is a very live debate on university campuses, in government and in the media. Change is not only affecting the way students make choices about which university to go to but it is affecting how they want to learn and live once they get there.



This is why University Alliance started a scenario planning project three years ago called *university\_vision*; to start a new conversation about the future of universities.

It has been a dramatic few years for higher education. There has been much debate, discussion and many decisions made, but very little has been led by the sector itself. University leaders, students and sector organisations have, in the past, been engaged in responding to already drafted policy proposals rather than putting forward our own thinking.

We wanted to change this by leading a process to ask the big questions about how and where universities need to position themselves to deliver the knowledge, networks and communities our country needs. Using scenario planning techniques helped us to explore different futures and have a more robust conversation within the sector, with government and with other interested parties. It has challenged the concept of what universities are for and the shape they will take in 20 years' time, and stopped the sector from simply playing the same game we have been rehearsing for the past five years. We needed a new game to look forward not back; to create a different paradigm for exploration, challenge and debate. Universities play a central role in driving economic growth, growing future talent, research and innovation and building a strong society; they are too important to be discussed without vision and passion.

University Alliance is delighted to have worked with the UNITE Group to build on our *university\_vision* work by exploring how students might live in the future scenarios we developed.

**Steve West, Chair, University Alliance**

“The scenarios we have painted in this document, like those in *university\_vision*, are not predictions. They are meant to serve as a provocation; to challenge us to think differently about how students will want to live and learn in the future. And we want you to be a part of this conversation, contributing your ideas and experiences, and challenging current assumptions about what our universities could, and should, look like in years to come.”



## PROJECT TEAM

**Daisy Hooper**, University Alliance

**Simon Hooton**, Ash Futures

**Martin Hughes**, TheUniversityBlog.co.uk

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We would like to thank the students who contributed to the project through an initial scenarios workshop:

**David De-Beger**

**Steph Driscoll**

**Louise Goux-Wirth**

**Chloe Green**

**Charlie Roper**

**Emma Weskin**

And the students who created the “Day in the life” narratives of students in the 2030s:

**Serene Lam**

**Miona Martic**

**Walter Pico**

**Cameron Sutherland**

## ABOUT THE RESEARCH

This project represents an attempt to understand what the future might hold for students in the 2030s. It was conducted as a scenario planning exercise over a period of several months, drawing on a very wide range of data and commentary, inclusive both of broad, global trends and of very specific changes within the UK's HE sector. This report is presented in four sections:

**Trends:** We present ten trends with the power to shape the living and learning experience in UK higher education.

**The HE ecosystem in 2034:** We use these trends to predict seven distinct missions for universities in 2034 within a diverse HE ecosystem.

**Living and learning in 2034:** Using a scenario matrix, we tell four different stories about possible futures, with a focus on the student living and learning experience. Each of these contains narratives created by current students, detailing a day in the life of a student in 2034.

**Using Scenario Research:** We finish by outlining how the scenarios research has been used by the project partners to date and invite further dialogue on the ideas and issues that have been raised.



### 1. A shift in the global economy

Emerging economies are showing the strongest growth at the moment. Many of these will mature over the next 20 years and some are likely to become dominant economic powers, overtaking currently established economies. As economic power shifts, so investment in education and research will follow. China, in particular, but also India, Brazil, Malaysia and others will continue to invest heavily in tertiary education. Students from any part of the world wishing to work within these new economies may choose to attend their leading universities.

If global economic balance alters, needs will change at the same time, with a resulting impact on many areas of industry. Some countries could take over dominance of industries that other countries had previously relied upon. This could happen in any industry; medicine, banking, education, energy, aviation, building, manufacturing, and so on. Sudden economic shifts have the potential to change the pattern of demand for higher education teaching and research.

### 2. Continued change to public funding for HE

At any time of economic uncertainty, funding for higher education comes under the spotlight and opinion tends to be sharply divided along political lines. Significant changes have been implemented in the UK's HE funding system over recent years and yet there are continued calls for further change. At such a time, policy makers need to look long term to create sustainable models of funding in order that the UK's HE system can maintain its global leadership position. Short term solutions would simply push challenges into the future. All this points to further and perhaps dramatic change to come for the UK's HE funding system.

### 3. Competition

Market forces have played an increasing role in higher education over the last few years. The new funding system in England is already entrenching these changes, and the greater availability of consumer information means that students and their parents will continue to make careful and discerning choices about where and what to study. Higher education is already attracting new entrants with attractive propositions. In the future more are likely to aim to carve out niche offerings in particular sectors or to tightly defined student segments. These may be for profit or not-for-profit. This competition for students is increasing on both a national and a global level. In such an environment, having a distinctive, well known and recognisable brand is therefore likely to become much more important for all institutions.

### 4. Demographic change

2010 saw the start of a decline in the number of 18 to 21 year olds in the UK population. At present there are still more qualified university applicants than there are places, and the continued increase in the rate of school leavers participating in HE is counterbalancing the drop in absolute numbers of school leavers. However, the number of part time and mature learners has fallen and recruitment from this group of potential learners will continue to be tough under the current funding system.

An increase in the 18 to 21 population is projected in the 2020s, with the size of this age group recovering to 2010 levels at around the middle of the decade and continuing to rise into the 2030s. University marketing and admissions teams will need to adapt to this change, and competition for places could be intense at the most popular universities.

If the scheduled removal of a cap on student numbers from 2015-16 goes ahead, the onus will be on individual universities, as well as the sector as a whole, to provide fair access for those from under-represented groups.

### 5. Ongoing impacts of the financial crisis

Students are likely to feel the pressure to be more instrumental and career-focused about their HE choices in some, if not all, economies as the knock-on effect of the 2008 financial crisis continues. Some prospective students will look to achieve financial stability as early on as possible, resulting in less risk-taking and a wish to complete education as quickly as possible so that they can start their career. Prospective students from middle income families may be persuaded to consider their future more carefully. Alongside high tuition fees, all aspects of income and debt are likely to be approached with more caution. Universities may not be able to recruit based on quality of teaching and resources alone, but may need to demonstrate the overall value proposition to the student. For many, the decision to go into higher education after school because "It's just what you do" will no longer be enough.

### 6. Stakeholder expectations

In a more marketised system, a traditional supply side approach to teaching will become increasingly less fit for purpose. Over time there is potential for relatively new financial stakeholders, including students and their parents, and in the future employers and professional organisations, to make greater and more specific demands on universities in terms of learning, teaching and assessment. Financial stakeholders of all kinds are also likely to expect universities to achieve greater efficiencies and agility in their back office systems allowing for flexible provision to fit in with these new and perhaps competing needs.

### 7. Technological change

Science fiction over the years has been reliable in predicting many developments that are now commonplace. What has not been so reliable is the speed at which those developments became a reality. We have seen technologies that were assumed to be tens, if not hundreds, of years away, appearing far sooner to the mass market. For example, the 2002 film 'Minority Report' is set in the year 2054 and features many technological advances, including projected screens that can be controlled by hand gestures. Only a decade after the film was released, and with four decades yet to go until 2054, consumer smartphone technology already boasts advanced touchscreen and eye-tracking features, while videogame consoles have motion sensing cameras to respond to gestures.

Although Massive Open Online Courses (MOOCs) have not yet had the disruptive effect on mainstream HE that was initially predicted, technology and changing social norms offer students new ways to engage with learning, much of it available for free. Universities are already rethinking the architecture of learning, teaching and assessment to take account of new technology. In the future, these changes may prompt a closer examination of the intangible benefits of a traditional residential university education alongside the use of online delivery methods.

Universities must also be aware of a growing digital divide as inequality in levels of digital literacy grows. Young people are increasingly aware of the technology around them and take it for granted, but that does not mean they are all equally equipped to make it work for them. Deep digital literacy requires sustained access to, and engagement with, online worlds and digital devices, just as deep literacy requires sustained access to and engagement with books. Institutions will have a greater responsibility to help students build appropriate levels of digital access, engagement, and critical understanding.

### 8. Access to information

Learning continues to change as the need to contextualise is seen as far more important than the need to memorise. Information is more abundant than ever before but there are questions over who controls the information, how much it costs, who has access to this information and how it is made accessible. Decisions over these issues bring with them differing societal and economic consequences; for example, increasing or reducing the digital divide, enhancing or restricting the development of social media, and potentially bringing new stakeholders into the overall student experience. It also suggests the need for continued investment in digital infrastructure - not being able to get online everywhere, quickly, all the time, is increasingly viewed as unacceptable.

### 9. Climate change

The effects of climate change may restrict universities' ability to act on a global stage by limiting travel and by causing significant disruption to national and regional economies. However, there is likely to be scope for alternative methods of collaboration, including extensive online collaboration and community-based projects. Indeed the enormity of climate change and its consequences could be a very strong driver for international collaboration and sustained research effort.

On a more individual level, some people may actively choose to make sacrifices and live somewhat less extravagantly than they could. This will produce a knock-on effect for providers of services. Those responsible for accommodation and academic buildings may be driven by students demanding greater transparency about energy use and far higher sustainability credentials, resulting in significant investment in estates.

### 10. Megacities and local communities

Population density in some urban areas could grow to tens of millions. These megacities may persuade individuals to embrace the smaller communities around them. City universities may find it possible to operate within a more enclosed atmosphere for many activities, without losing impact. This would be possible as cities expand not only in terms of population, but also in size and scope. A campus could develop like a small city in itself, with students enjoying exclusive resources on campus, many of which could be provided by the private sector or third sector. This may include a range of specialist accommodation, extensive shopping areas, entertainment venues and leisure opportunities all within university grounds. In addition, students would find many opportunities for part-time work without having to leave campus. A relatively enclosed yet large area would promote safety whilst also allowing much interaction within the academic community. Such campuses can already be seen in some parts of the world, for example KAUST in Saudi Arabia.

# THE HIGHER EDUCATION ECOSYSTEM

IN 2034

“The traditional university model is the analogue of the print newspaper... in fifteen years max, you’ve got the transformation.” *Ernst and Young*<sup>1</sup>

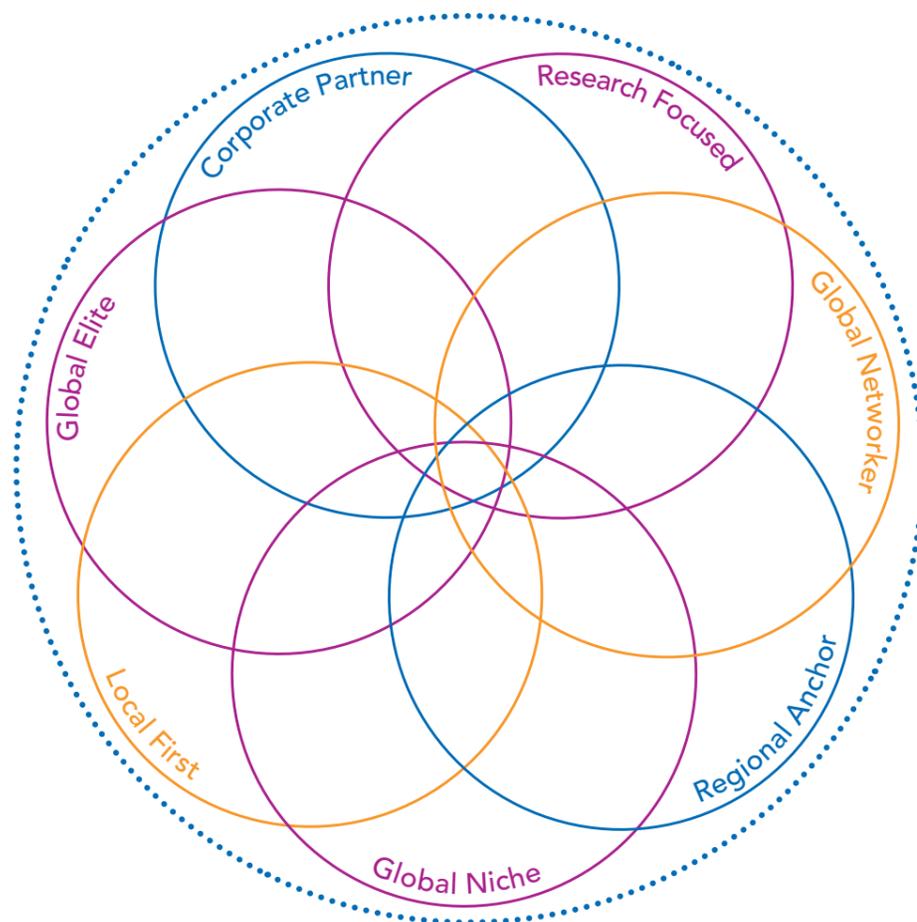
Over the last twenty years we have seen changes to every aspect of the UK’s HE sector, in terms of its size, shape, funding, leadership and management, relationship with its staff, modes of teaching and learning, research activity, student base and engagement with business and the community. Twenty years into the future we can expect the sector to have gone through an equally significant period of change and to look quite different. This section projects forward the trends outlined above to set out a possible future for the UK sector, one in which specialisation and distinctiveness are essential components of being a successful university.

The decisions that universities take about the future will depend on their existing strengths, relationships within and outside the sector, the specialisms for which they have or can establish a reputation, and in some cases their willingness to embrace change and their ability to manage change successfully. Faced with the pressures outlined above, individual universities will need to make a series of choices about how they can carve out a viable future in a changed higher education ecosystem.



## What could this new ecosystem look like?

A number of distinctive strategic directions have already emerged as successful nuances on the traditional model of what it is to be a university. The narratives that follow imagine how these different activities may look twenty years from now. As large and complex institutions it is anticipated that every university will show characteristics of more than one of these models and the balance of activity will reflect their mission and strengths. It is the diversity of the sector that will help to ensure the UK continues to lead the world in higher education.



## Global Elite

“Perhaps the expansion of higher education is in fact an essential corollary to the perpetuation of an elite national stratum of universities: the mass base interlocking with the elite institutions to create a coherent whole?” *Palfreyman and Tapper*<sup>2</sup>

In 2034, there are fewer than five institutions in the UK that compete at the top of the global rankings. Those that do will find it easiest to secure the most highly achieving students, researchers and academics in the world. These institutions have substantial endowment funds which enable them to continue investing in their facilities independent of equity or debt funding. Their offer is based on a very traditional view of the university experience that brings nostalgic elements into structures and buildings.

To remain globally competitive they need to maintain their globally recognised brand and research income and continue to build a strong alumni base. These universities are destinations, and their learning and teaching model is still predominantly built around a full time residential experience. Given the higher numbers of elite international students these institutions attract, expectations about the level of all facilities have risen. Some of these universities have invested heavily in residences, others have sought partnerships with external providers who can offer the quality and distinctiveness expected by their students.

## Local First

“An argument can be made that [a university’s] physical situation carries with it a responsibility to that locality. And in an era of fiscal restraint with an increasingly competitive market, many more students may choose to live at home during their studies. Thus universities will become increasingly dependent on local and regional markets.” *National co-ordinating centre for public engagement*<sup>3</sup>

A number of universities have adapted to change by providing a very localised service that features strong integration with further education and in some cases schools. Concentrating solely on undergraduate provision, these institutions have one or more links with other universities, feeding into specialised and post-graduate opportunities. They make considerable use of online learning in order to reduce costs to students and often perform an important outreach role delivering HE in areas that are not well provided for.

By 2034, some still retain a particular specialism that is attractive nationally and even internationally. Some have strong links with similar institutions in other parts of the world, supporting their students and researchers to network online. The majority of students at these universities commute in daily or are distance learners, so there is little requirement for accommodation. They may retain some budget accommodation, and outsource any requirement for a higher specification and short term provision to local hotels.

## Global Niche

“In being simultaneously responsible and authentic, the university attends to its interests in learning and inquiry by placing those interests in a global context. ‘Learning’ now becomes, for example, a matter of developing its students as ‘global citizens’; inquiry now becomes a matter of developing global understandings of matters of significance... Potentially, the whole world becomes its stage.” *Ronald Barnett*<sup>4</sup>

Some universities with strong reputations in particular areas have decided to pursue those specialisms at the expense of a more comprehensive course offering by 2034. Global niche universities offer state-of-the-art facilities and world class experts in their specialist areas. Some are primarily teaching institutions, with an emphasis on graduate and postgraduate education, though they support applied innovation and research with businesses related to their niche. Others may offer world-leading research in their specialist subject area.

For students with a clear idea about their future careers, or who are already mid-career, these universities are the obvious choice, offering a high quality specialised offering supported by employers in the relevant sector. As destination universities, many of their students still study on a full time residential basis. Many of these institutions have outsourced all or part of their accommodation requirement to invest in learning facilities. The professional nature of many courses requires a greater level of flexibility in organising student accommodation, as students undertake periods of work placement or attend for shorter professional programmes.

## Regional Anchor

“As ‘anchor’ institutions within their regions, universities have fundamentally shaped the character of the places where they are located. Through their intellectual contribution, brand, role as a major employer and active contribution to the development of regional economic strategy, universities are playing a critical leadership role.” *University Alliance*<sup>5</sup>

Some universities define themselves in relation to their region, and in turn help to define that region. These universities are likely to be part of regional networks and may even have gone through a merger with other institutions in their region. To a greater or lesser degree, Regional Anchors have focussed their research capability and teaching portfolio on the needs of the UK economy. By 2034 they offer their regional economy access to the global economy through their international networks and partnerships. Their research and teaching strength comes from their strong relationships with business and their focus on innovation and enterprise. This makes them responsive to the global economy, creating courses and graduates in new professions and industries that drive growth.

1. University of the Future. Ernst and Young. 2012 2. Structuring Mass Higher Education: The Role of Elite Institutions (D. Palfreyman and T. Tapper, 2009, Routledge)

3. p.10 - Embedding public engagement in higher education: Final report of the national action research programme (National co-ordinating centre for public engagement) 4. Ronald Barnett (2011) Being A University, Routledge p.105 5. www.unialliance.ac.uk/wp-content/uploads/2011/09/UA\_GROWING\_THE\_FUTURE\_WEBVM.pdf

They are strong regional recruiters because of their success in providing graduates for the region's industry base, but are also attractive to students from the rest of the UK and globally. Regional Anchors have some commuting students; however, there is still demand for on- or near-campus accommodation. Capital for investment in accommodation is hard to raise so where replacement or major improvements are needed, many seek partnerships with specialist providers both to build new, and manage existing, stock. Accommodation quality is mid-range, reflecting the fee levels and expectations of the students.

## Global Networker

**" More than ever, the key to innovation and economic growth will lie in the freest possible movement of people and ideas - on campus, and beyond."**

*Ben Wildavsky*<sup>6</sup>

Most universities have seen opportunities in the globalisation of higher education and the eastward shift in higher education investment, but Global Networkers have established partnerships with other institutions in South East Asia, the Middle East, South America and beyond. They actively use the facilities and experience of the different institutions in their networks to create a learning culture that is fully international.

By 2034, some UK universities have been absorbed into networks or mergers with universities in other countries who see them as a quick route to new markets. These partnerships range from teaching and learning opportunities to world-class research collaborations. Their students expect a fully international experience. Accommodation will reflect this, from flexible terms and short stays, through to a culturally sensitive service offering. Where universities have their own accommodation it has been subject to ongoing investment to keep pace with student expectations. Otherwise, they use external providers who can offer the quality, flexibility and service levels required.

## Research Focused

**" In UK universities something very special is going on - people are having big ideas... The sort of big ideas that will, if invested in, nurtured and exposed to the right opportunities and collaborations with business and international partners, provide the foundation for future UK economic growth and prosperity."**

*Lord Bilimoria*<sup>7</sup>

Research from UK universities is consistently world-ranked across many fields of discipline. In 2034, some institutions will choose to focus on a traditional academic experience, with devolved research departments. These institutions will provide a comprehensive research programme. Their staff will feel significant pressure to publish and to be rewarded on the amount of successful grant applications they submit.

Through a combination of undergraduate and postgraduate offerings, these institutions will compete globally for students who desire a research-based experience and a more traditional academic career path. These students predominantly live in student accommodation for their first year which is either provided directly by the university or in partnership with an external provider.

## Corporate Partner

**" We're going to see more bespoke higher education provision and find universities flexing what they offer - making it more flexible, more part-time, great sandwich courses with companies, more sponsorship by companies, changing the curriculum to fit into what the sponsoring employer wants... What I think we're going to see in the coming years is more work while you learn or learn while you work."** *John Cridland*<sup>8</sup>

In the future, due to the pressures of a competitive and demanding job market, young people may increasingly choose to find employment straight from school and to identify routes for higher education from within a company environment. Similarly, large employers keen to secure a talent pipeline are likely to target recruitment at school leavers (or even earlier) and play a strong role in shaping a HE experience for their trainees. Universities who specialise in meeting these needs use all available technologies to enhance the student experience and minimise costs. Blended learning, flexible and work based routes to qualification are the norm within these types of courses.

Corporate Partner universities provide both undergraduate and postgraduate qualifications, tailored staff development and market-ready research for their network of partners. However they are also likely to combine this with a more traditional course offering and many of their students will opt for a blend of the traditional university experience and professional or vocational opportunities. Student accommodation will need to take both of these drivers into consideration and provide space that is both functional and flexible.

This specialised mission has attracted a number of alternative providers to enter the higher education sector and establish tailored institutions to target the corporate market they know well. For many students at these institutions, learning will take place at home or in the workplace, with occasional intensive periods at the university. Some companies will want to provide accommodation for trainees and apprentices when away from their home base, or if they are school leavers. The expectations are that accommodation will reflect the needs of mobile professionals, looking and feeling like good quality serviced apartments. Most of the institutions choose to use external providers with expertise in managing variable demand.

# STUDENT LIFE IN THE UK

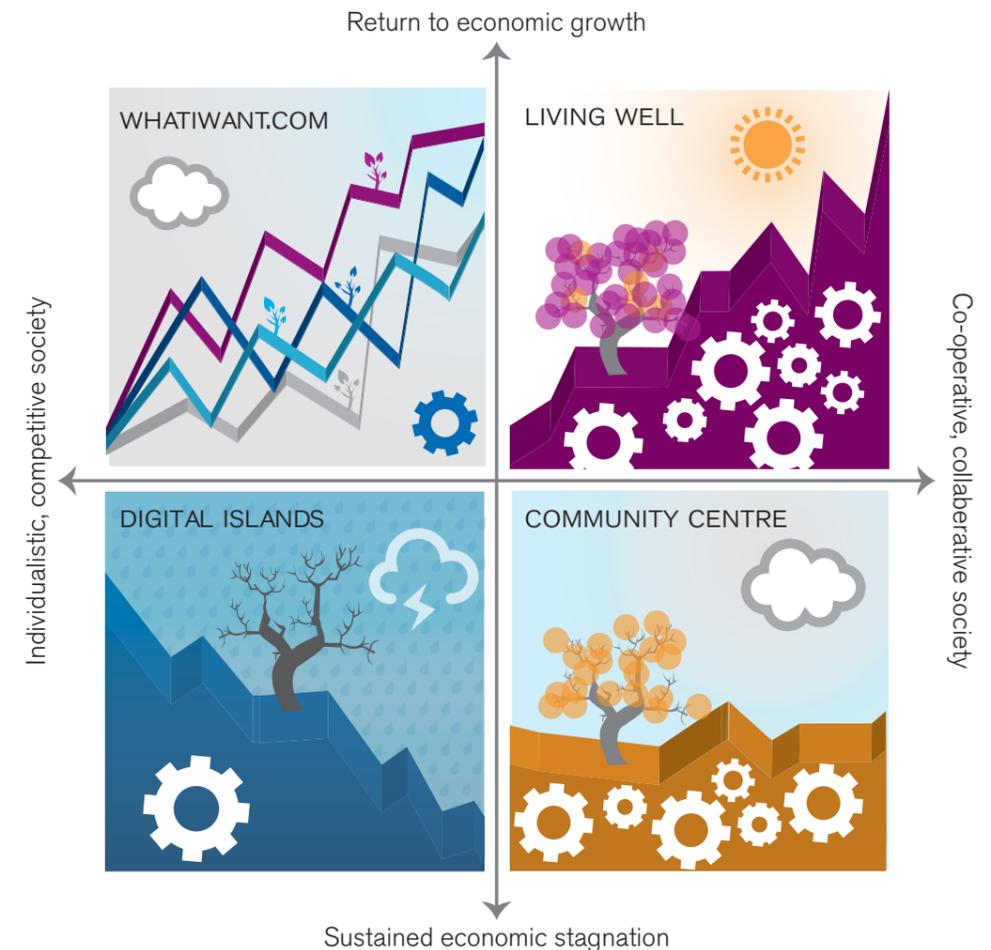
IN 2034

## FOUR SCENARIOS

The next 20 years will bring profound changes in all aspects of our lives, and the way in which students will experience higher education will be an inherent part of this. The causes of these changes, such as global economic change, population growth, political and societal change, and climate change, can be predicted to an extent, but uncertainties still remain.

If our views on the future are to be well informed they need to be grounded in an understanding of what is driving change, and they need to be able to balance uncertainty with a structured way of thinking about the future. This is where scenario planning becomes particularly valuable. It does not attempt to predict the future, but by constructing a number of engaging and different stories about possible futures it challenges us to consider what may lie ahead - and how we can respond.

In the following scenarios, the future of university student accommodation is explored as a product of the way in which students will live and study together. This work builds on the initial research carried out for the *university\_vision*, a project by University Alliance which sought to explore the issues and challenges facing universities in the future. Working with experts from around the UK, *university\_vision* asked the big questions about how and where universities need to position themselves to deliver the knowledge, networks and communities our country needs. This project has used the same matrix to construct these scenarios - focusing on economic and societal change as the main areas of uncertainty - but has focused more specifically on the student experience. In doing so, it has produced four very different stories about how students will live and learn in 2034, which are set out below.





RETURN TO ECONOMIC GROWTH AND COLLABORATIVE SOCIETY

The future is bright. The UK has managed to overcome its financial difficulties and continues to operate successfully on a global scale. Governments are collaborating to tackle climate change and society has embraced sustainable living. People are broadly community focused and working together for the greater good.

The UK is a thriving knowledge economy and employers are keen to identify graduates with the knowledge and skills they need. However, fewer low skilled jobs now exist, meaning limited opportunities for those without a university degree and postgraduate qualifications. Young people are all too aware of how important it is to participate in higher education.

Enrolment rates in universities are therefore high and students are highly motivated and demanding, seeking reliable and high quality teaching across the sector. Student living and the wider student experience are valued as a rite of passage more than ever. Future employers are keen for students to use their time fully and to enjoy a rounded student experience which is seen as a key element of personal development.

Student Accommodation

Sharing ideas and converting knowledge into new products and services creates growth, making collaboration a key plank of economic policy. This is encouraged everywhere and student accommodation is no exception, reflecting the importance of community as well as practical need for bed spaces. This is, after all, a society where friendships, connections and sharing ideas are valued and valuable. Community spaces that facilitate this are essential elements of student housing and allow students to start as they mean to go on.

Buildings are expected to be energy efficient. New builds are energy saving and reliant on renewable power as standard. Old buildings have also been adapted to keep up with developments wherever possible.

With so many opportunities to collaborate with other universities, accommodation needs to be flexible enough for students to come for a term, a semester or a year from another partner institution, either in the UK or internationally.

Students expect inclusive digital connectivity within their living space so that online and offline activity is seamless in this digital and social era. Students increasingly rely on a range of devices to deal with the world around them. However, the devices do not require input from people directly; much of the communication will take place between the machines. The internet permeates all aspects of personal and professional life; it is an everyday norm that plays an almost silent and expected part in supporting students in their day to day life and to achieve their personal goals.

Living and Learning in 2034

- UK industry is world-leading.
- Careers may be considered early on in life, but with a broader scope of flexibility and innovation.
- Employers form long-term relationships with universities and seek graduates with many skills and qualifications.
- University seen as a necessary rite of passage to create innovative and collaborative graduates.
- Students have room to explore, but not to be complacent. They look for productive spaces and convenience so they are not bogged down by irrelevant issues.
- Accommodation is energy efficient as a matter of course. It is also expected to include a full range of digital connectivity.

- There are many opportunities for both students and academics to collaborate internationally with other institutions.
- Overseas student numbers have increased, keen on physically attending UK universities in order to capitalise on a wealth of opportunities and connections.
- Postgraduate enrolment becomes the norm and increases significantly.

Magnus



Magnus has a purpose. Each morning, he searches on his handheld device for things to do from a central database of activities relevant to his academic work and lifestyle. Before venturing out, he has a quick video call with an academic advisor regarding an area of coursework that is confusing him.

Breakfast is quick, but Magnus's kitchen area is a connected common room where he can chat with other students. His first appointment of the day is a briefing on campus for the students on his course. Most of his classmates attend in person as they know it's a good time to swap ideas. Magnus then pops into the library to take part in a virtual seminar with other students from his course to discuss a textbook they have been reading online.

Next he takes a university shuttle bus into town. Linked with his study, Magnus has regular opportunities to get hands-on learning in his field with local businesses. Later he returns to campus to visit the students' union, where he is working on a charity event with several other unions, including one overseas. Video links are set up so everyone can work together.

Magnus moves around campus for a number of afternoon meetings and small seminar groups before heading back to his room. He watches some short videos related to his course while he gets ready to see a local band that his central resource has suggested he might like based on his music preferences.

Peach



Peach is keen on keeping some things in her life basic. Although technology continues to improve at incredible speed, there are still many environmental issues close to her heart. In addition, Peach is health conscious and nutritious eating plays a big part in her daily decisions. This morning, her first choice is to tend to a university allotment that provides fresh fruit and vegetables for students and the wider community.

Peach also has pot plants on a balcony area in her accommodation for growing herbs and small fruit. Her building has a roof garden that benefits from some of the waste produced within the building, and rainwater is harvested for use in the building's toilets. Ecologically responsible student accommodation is now expected by most students.

Study is a mainly personal matter. A lot of time is spent on campus in quiet study with much reading and writing taking place. That said, Peach has full connectivity in her room and can undertake a lot of research and academic contact in the comfort of her own surroundings.



SUSTAINED ECONOMIC STAGNATION AND COLLABORATIVE SOCIETY

The UK's relative importance has declined as economic and political power has moved towards the East, and the City of London has significantly declined as a major financial centre. UK businesses and institutions still have the skills, expertise and relationships that are valued around the world, but confidence seems low. The business community in particular is nervous, risk averse and very reluctant to invest in anything new. However communities are stronger than ever and there is easy access to good local services and schools.

The higher education sector has suffered a decline in demand. Full-time study is no longer the norm. Part-time students form the majority of places, as people look to full-time work as a means to an end. The student experience has been reduced to little more than a person's reliance on a necessary educational service.

What is left of public funding for higher education is primarily concentrated on supporting students onto relevant courses that are important to the local labour market. Government is also able - due to the reduced costs and lower funding - to support a substantial number of people from disadvantaged groups into higher education.

In order to receive the best learning content at low cost and without the need for expensive travel, students look to online learning either to fulfil or at least supplement their education.

Student Accommodation

It is usual for first year students from outside the area to be offered a room in student accommodation; thereafter, most can apply for a room for one more year before moving out. However, many students choose to stay at home, whether through choice or necessity.

The accommodation market is changing and the wise players have diversified. Some have capitalised on industry demands where students take extended periods of training away from university and are expected to live close to their place of work for that duration.

The growing part-time contingent means there is no longer the same sense of community enjoyed on campus in years before. Universities have responded by investing in facilities that help students to socialise and learn together. This is achieved through collaboration with the wider community, especially for those universities in urban centres. The transition was not difficult as most students have lived in the area since birth and, as such, are well-placed to make the most of their surroundings.

Universities further promote a sense of being by encouraging local students to share their area-specific knowledge with other students who are new to the locality.

Student movement into new areas is seen in a positive light, given the relative lack of travel in general. New students are given many opportunities to share their own skills and quickly integrate as valued members of this new community.

Living and Learning in 2034

- Learning is rationed and the need to keep costs down is key, while meeting economic priorities.
- Part-time learning combined with employment becomes a norm.
- Full-time students do not expect to be guaranteed accommodation and more will be living at home to manage costs.
- Students will seek new ways to find success. Social entrepreneurial spirit becomes more of a norm and community initiatives allow many of these ideas to thrive.

- UK businesses still have skills, expertise and relationships, but they have become nervous and risk averse. However they play a big role in working with government to determine the type of skills needed in the economy.
- Unemployment has risen, but so has voluntarism. Communities are strong and people get involved in a wide range of local projects. Local initiatives such as trading schemes, co-operatives and credit unions are on the rise.
- Government has limited funds to invest in infrastructure and cities are suffering as a result.
- Public skills development programmes are popular but there aren't enough jobs. The most talented choose to leave the UK to find work.
- Full-time student numbers are lower, but significant numbers still study.
- The student accommodation market is changing and the wise players diversified a decade ago to take advantage of a broader range of market opportunities.

Edith



No longer living in the countryside, Edith has moved to a city university. Her accommodation is 'no-frills', but it is functional and comfortable. It took her a while to get used to her new surroundings, but with many local residents around her she was soon introduced to a caring community and the many friends that came with it. University support was also helpful, albeit in a more distant, digital way.

The vocational nature of Edith's degree means that she spends a lot of time out and about, visiting small businesses in the city. One employee spots potential benefit in Edith's links with another geographic area and suggests possible ways to develop partnerships between city business and more rural enterprises. Her university recommends relevant modules that will support her in this.

When Edith gets back to her living quarters, she makes a quick meal and gets in touch with her family. She may be in a city now, but she still feels very connected to her home.

Asher



Asher is funded by a co-operative network to work through university. He started attending in his mid-twenties after gaining this local funding to give him further skills to help give back to society. Living in the family home, Asher spends a lot of time at a computer to work on tests and lectures online.

The co-operative helping to fund him through university originally stems from a local resident who went out to Malaysia to build his business and returned to put money into the local economy and help people like Asher. Asher would like to offer a similar legacy.

When he is not studying his personalised modules online, he is working on a local project to rejuvenate the town. Asher's family also work on supporting the local area and are lucky enough to own their own property. Another student attending the local university lives with them and would not have been able to attend if it wasn't for this generous offer of accommodation.

In the evening, Asher sets aside a little time to catch up on some lectures, but he is also looking forward to going out to see his friends for a rare outing and a few drinks.



STAGNATING ECONOMY AND COMPETITIVE SOCIETY

The boom times are over. The global economy has remained in what was once described as 'a short period of readjustment' and there is no sign of any recovery soon. The business community is nervous and risk averse. There is great reluctance to take on any more debt and investment and innovation have slowed dramatically.

Government funding for higher education has been cut and students have to self-fund their studies. The main purpose of HE is now almost exclusively training for employment. Local employers commission courses from further education/higher education partnerships according to workforce needs. With a struggling economy, however, funding from business cannot fully replace public funding.

There are fewer universities overall and many institutions have merged, but overheads always have to be reduced. Overall student numbers are down, and very few go on to postgraduate education. A small number of 'elite' universities remain. The difference between these more traditional institutions and other universities is pronounced and this exacerbates social division in society.

The student experience is no longer a key focus and it is certainly less broadening. While students continue to enjoy downtime and socialising, there is little variation in the activities available to them. Less emphasis is given to building networks and as a result, many students tend to keep to friendship groups they already possess in the local area. The clubs and societies enjoyed by previous generations have mainly fallen by the wayside as experiences purely for the sake of fun are rare and large scale social gatherings are severely limited. Extra-curricular activities are now more likely to be those showing more immediate benefits, such as specialist training courses at local companies to enhance professional development, and business workshops that provide industry insight and payment for time.

Student Accommodation

More students remain at home and there has been a fall in demand for accommodation. While this is not a universal trend, it does mean that many students can live at home and minimise costs. It often means, too, that they have better quality housing, though with longer travel times and some reduction in their independence. Students in rural areas, however, do not have that choice and will continue to rely on universities and private providers for a place to live.

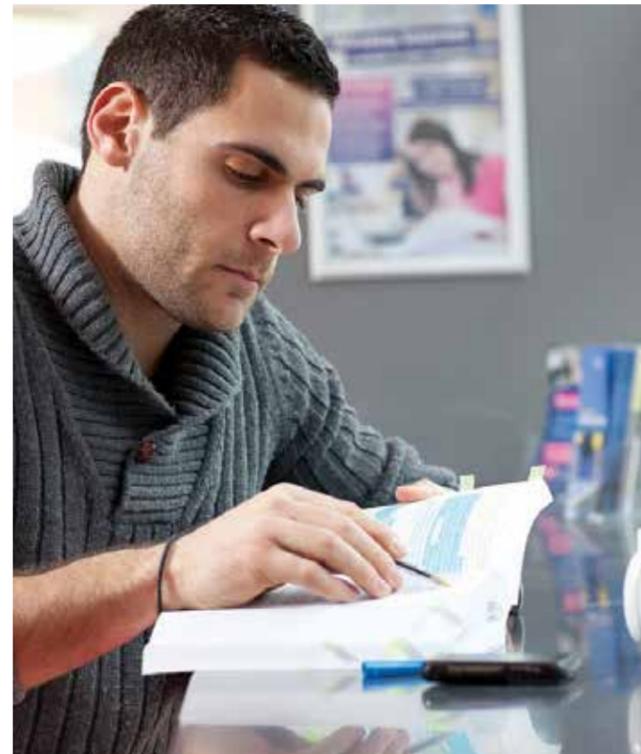
In this frugal age, today's students are willing to accept fewer frills and fripperies than their parents did, if it means they pay less. All they ask is that housing is clean, well maintained, functional and safe. Beyond those basics, they are willing to accept considerable variance in quality.

Although accommodation for UK undergraduates tends to be on the more basic side, international students seek a higher standard of accommodation. Institutions have to provide this in order to remain competitive, because if international student numbers drop too far then the institution will lose out financially. Domestic students are therefore often priced out of anything other than basic accommodation provision.

Students no longer have the same excitement and relative sense of freedom from university life. They recognise the importance of training and getting to the other side, into work. This importance is more through necessity than through any sense of ambition and aspiration. Like much of the wider public, they do not feel engaged, nor do they feel much sense of responsibility beyond themselves. Learning, therefore, is now considered less an exploration and more a set of hoops to jump through.

Living and Learning in 2034

- Students will look to local universities for cost-effective training toward a chosen career. Expectations are for a quick turnaround, with more full-time degrees being delivered in 18 months.
- The 'student experience' is utilitarian. Students are seeking a route to employment and they engage in activities with direct and tangible benefits.
- Inequality between those in 'elite' institutions and those in local universities is pronounced. There are fewer universities; many institutions have merged.
- Curricula have narrowed and there is less scope for non-applied subjects. Full-time degrees are delivered in 18 months.
- There is little optimism in Britain. Personal debt has increased, pensions have decreased and jobs are not well paid. Britain's industrial base is significantly weakened.
- Consumer choice is driven by necessity and price. Consumption is efficient.
- Business is short-termist. Training and education are regarded as a cost rather than an investment. There is little or no innovation.
- HE's purpose is training for employment. Local employers commission courses from FE/HE partnerships according to workforce needs.
- Students from the cities favour going to their local universities and demand for accommodation has fallen.
- Postgraduate education has declined.
- There is little differentiation of accommodation by quality or service; basic property management is all that is required to be a provider.
- Uncertainty and reactivity can create fluctuations in student numbers year on year. As such, successful accommodation providers have the flexibility to expand or reduce capacity as required.



Alfie



Alfie wakes up in his hostel. It is very cold but energy is metred and his grandparents, who pay for his accommodation, are already at the limit of their budget. Winning a place at a large metropolitan university to train as a building surveyor was a huge achievement but he has struggled to keep pace with his class even though he knows competition for jobs will be fierce.

Wrapping himself in a large blanket he immediately logs on and starts working through today's modules. It's important he finished these by lunchtime so that he can go over to the International Students' Hall for his daily language session. There are jobs in the Far East and this seems like the only sensible way forward – and besides, it will be warm there.

In the early evening he goes to work at a local supermarket. This was a compromise, he could have used the time to volunteer through his university but he just needs the money for food. He fears that students with fewer financial pressures will look more attractive to employers.

His only social event of the day is a quick online catch up with his best friend from school, Harry, who is studying International Law at an elite university. It is increasingly clear that Harry is having a very different university experience and they have less in common as time goes on. But Alfie finds it very difficult to make friends at his own university, most students are from the local area, live with their family and have known one another since childhood. Alfie chats for a while with the night receptionist at the hostel before returning to his room to sleep.

The Student by Cameron Sutherland



Being a student has changed. Most student bars have gone out of business, social networking sites have essentially become a litany of people's grades, technology has vastly improved and people are connected to everything except each other. The time gap between wanting something and owning that item is miniscule. It's this sense of immediacy that is turning rational thought, before making a decision, into a reflex. The sole desire of this society is money and success, and the reflex of its young generation is studying via a two-year crash course.

The student wakes with the bare minimum amount of sleep. His bloodshot eyes are almost eclipsed as a result of devolution, as it's now a predatorial instinct that drives him to compete, look the best and have more than others. Click to retweet.

Focus is essential, so he starts the day by taking the concentration pills that sit by his bedside. It's a measure that every student takes and there are a lot of students, so he doubles the dosage. Click to retweet.

After hastily putting on clothes, a quick revision session is in order to refresh his memory for his lecture, to keep on top of his competitors. The student just manages to cram some cereal into his morning routine. After the walk into university the student attends his lecture, answering as many questions as possible so that the distinction from others is etched into his forehead for all to see. Click to retweet.

The student eats only for sustenance, so any cheap food is sufficient. After eating, the student sits and revises in the library as his accommodation serves questionable tap water and has no heating.

The ever increasing debt is another issue which is at the forefront of the students mind, so as he walks back to his accommodation he looks out for part-time jobs, which unfortunately aren't in demand as "part-time availability" is not what employers are looking for.

The student is also in constant search for any extra curricular activities he can partake in, with almost a childish hope of being scouted by local businesses. Click to retweet.





## GROWING ECONOMY AND A COMPETITIVE SOCIETY

The combination of economic growth and increased competition has led to a generation of young people who are determined and focused in their quest to get as much out of their life and career as possible. Academically, professionally and socially, the work of students is intense. Students expect a demanding future working life in which hours are long and rest is considered a luxury, there is a relentless flow of deadlines and regular international travel and working on the move is common.

Meanwhile, higher education is at the forefront of sustaining the knowledge revolution. Research is valued for its contribution to economic growth, concentrating on market-ready research. There are fewer institutions than two decades ago. Those which remain have a global brand and are able to invest significantly in the infrastructure they need to maintain their reach and to attract staff and students from around the world.

Easy and regular access to academics is expected as a matter of course and applicants are keen to find out in advance what type of contact time they will receive. Advanced digital communications enable contact time from anywhere, though this places significant demands on universities and their academic staff.

Students are highly demanding of their university, but they also expect to find academic value outside their home institution. Many choose accredited online courses, involve themselves with relevant trade associations and societies, and network enthusiastically with big names in their chosen field. This shift in attitude has driven universities to become more efficient in the amount of time students spend on their degree. For full-time undergraduates, eighteen-month and two-year courses are not unusual.

Overall, higher education today is designed for the high performer of tomorrow. Fees are high, but this is justified by the quality of service.

### Student Accommodation

Universities can benefit from providing a full package to applicants demanding such high service levels in all aspects of the student experience. The right accommodation package can be a huge differentiator and universities exert a very high degree of control to ensure providers deliver what they want. Savvy accommodation suppliers spend considerable effort building close, strategic, and flexible relationships with the right institutions. Strong, meaningful branding and values are key and help build these lasting relationships with the most successful universities.

Of course, it also helps to build lasting relationships with the best students too. Students are looking for best quality in their accommodation, but they are also accustomed to shopping around. They may be young and less well off, but they have high expectations, demanding both quality and value for money.

Naturally, the accommodation market is crowded. Quality varies with pricing and students recognise this. Those who can pay will do so in order to get the best features and service possible. Nevertheless, quality is generally high across the board.

### Living and Learning in 2034

- Students demand many different ways to interact and meet their learning needs.
- Specialisation is common, but with individual student interests in mind.
- Education is part of a much bigger picture for many students. The old accusations of lazy students are practically forgotten now. Total downtime is rare and most activities have good reason and vested interests behind them.
- Digital technologies are integrated into everyday life. Fast and reliable access is taken for granted.
- All-in-one packages with inclusive services are favoured to help save both time and money.

- Students are keen to find the best experience and quality of teaching possible. Some are willing to pay more if they consider it a useful investment for their future.
- Accommodation varies in price, but is always well serviced. For those who can afford it, exclusive features and luxury space can be purchased at a premium.

### Sakura

Sakura speaks three languages fluently, including English, which is why she chose to study in England. Sakura has the best student accommodation on offer which includes a private kitchen and dining room, bedroom and study area. The accommodation block also contains social spaces to hang out and collaborate with other students.

Most days begin with an academic update. Lecture and seminar sessions are limited to small groups to allow in-depth discussion. Sakura makes sure her daily schedule is planned carefully. The academic day also includes opportunities to pursue personal businesses at an on-campus student business hub - Sakura runs a small but successful multi-lingual business.

Sakura's schedule is tight, not just because she has so many different tasks on the go at once, but also because she's studying at an accelerated pace over eighteen months. There is a lot happening at once and Sakura sees the strain this puts on some fellow students. Fortunately, Sakura has the income to delegate the day to day running of her business, and lots of support from her family back home.

Her evenings are spent in the business hub or common space when she needs to work with others, or her own living space when work (academic or otherwise) needs to be done alone. She is up until the early hours of the morning, but finds time to wind down using a meditation ritual before bed.

### Malik

As technical director for his family business, and with campaign commitments for the Students' Union - not to mention a packed academic schedule - Malik's time is stretched to the limit. Fortunately his privately run accommodation is on campus and, like all student accommodation, comfortable and well serviced, so he is able to make the most of his time. Dressing quickly, he passes through his shared kitchen/diner to grab a quick bite and sees one of his flatmates still working on an assignment from the night before.

There's no time to chat though because every minute is accounted for. Half way through the morning he receives notice of a change to his schedule meaning that two of his evening meetings will clash. Shortly after, while attending a seminar, he is informed of an urgent business issue that must be dealt with. This could leave him falling behind on some academic work or having to submit assignments that he is less than satisfied with. In the end he cancels a chunk of time dedicated to his Students' Union work. This is the second time he has done this in a fortnight and he knows this will not look good. He hopes that the business problems won't take long to fix and that he could still put in a late appearance.

Malik finally returns to his room at 1 am and puts on some music. The day has been relentless but he's not achieved everything he wanted and he knows he'll have to be up at 6am for a conference call with his technical team in Pakistan. He tells himself he'll find room for a 20-minute power nap tomorrow afternoon, but knows this is a luxury he very rarely achieves.

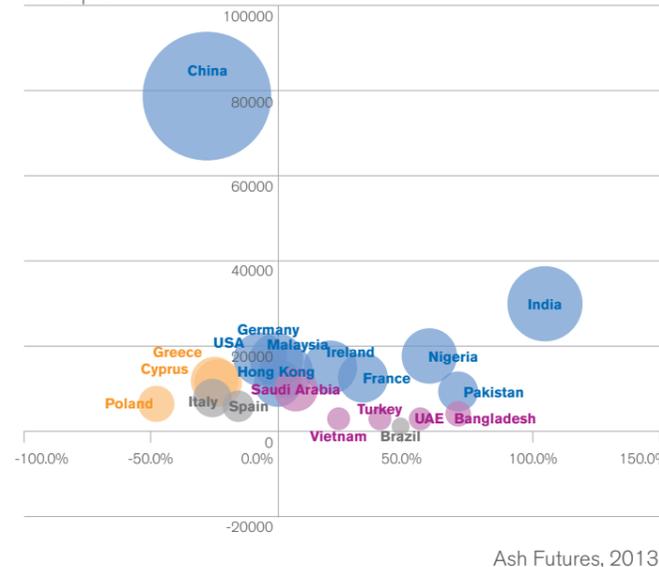
## USING THIS RESEARCH

Scenarios are widely used by businesses, government and universities to inform strategy and policy development. This can be done on a large or small scale, as part of a wider body of work or as a discrete exercise, as a way of gathering expert opinion from external bodies and individuals, or as a method to develop internal thinking. Both UNITE and University Alliance have, in different ways, used scenarios and wider futures research to inform policy and business decisions. A snapshot of some of these is given below which we hope will provide some ideas for how this research might be used.

### UNITE Group and Ash Futures: Globalised Higher Education

The attractiveness of UK higher education to international students is of perennial interest not only to the sector, but to government and the wider public too. International students bring diversity and new ways of thinking to the academic debate, their fees support essential investment in the HE sector and their spending power is of vital importance to many businesses in university towns and cities. International students also give the UK increased 'soft power', by creating networks of influential alumni across the world.

Early in 2013, UNITE worked with Ash Futures to make sense of the many different projections of international student number growth in the UK over the coming ten years. A new econometric model was developed to provide a projection of the changes in demand for UK HE from students across the world, however this was tempered by consideration of known uncertainties, particularly economic shocks and changes in political will, both in the UK and in students' home countries. This piece of work was of immense value to UNITE in helping to understand the likely future demand for student accommodation from international students, and by anticipating which countries they would come from in order to be more prepared to meet their cultural needs and expectations.



The chart above summarises the results of the analysis. The higher the country on the chart, the larger the current market. The right hand side of the vertical axis depicts where growth is anticipated over the coming 10 years - the further to the right, the more rapid the pace of growth. For countries to the left of the vertical axis, a fall is projected in the number of students coming to the UK. The further to the left, the larger the anticipated decline. The colours depict different groups of countries. Blue countries are those anticipated to be the most important origin countries by 2023, orange countries are vulnerable markets, and purple ones are emerging markets.

### University Alliance: Rethinking how we fund higher education

The world is changing fast: how we work; create, share and receive knowledge; deliver value; and connect to people around the world. Our higher education system and the way we fund it needs to adapt to the rapid pace of change as individuals and the economy place new and changing demands on how and what it delivers.

The limitations of the current system stem from operating a single, expensive funding system for undergraduate provision. Problems include:

- a potentially unsustainable and unaffordable system in the long-term;
- a lack of financial support for post-graduate and second chance students, which cannot be easily resolved under current loan conditions;
- the public being unable to see where the Government is investing in higher education, with subsidies largely invisible to students;
- the long repayment periods for graduates (26 year projected average repayment period and growing), making the system burdensome; and
- the lack of space for new and private providers in the system without taking numbers away from established providers.

University Alliance is responding to this challenge by developing a proposal for an alternative funding system for the long-term future of higher education, working collaboratively with Vice-Chancellors, economists and experts from across the sector, outside HE, as well as experts from overseas.

University Alliance have developed a framework for building a robust funding system that puts higher education on a sustainable and flexible footing. Their proposed funding system will:

1. Re-direct government funding back into teaching, resulting in lower fees
2. Reform student support to target those most in need
3. Increase access and support for students who learn while in employment
4. Use a progressive, income-contingent repayment system
5. End the one-size fits all approach
6. Introduce a single regulatory system
7. Be genuinely flexible, expandable and market-driven - able to meet the needs of our future economy
8. Re-establish the Government-student contract
9. Be cost-efficient for Government

### UNITE Group: Digital Futures

It goes without saying that young people are the pioneers in adopting, and abandoning, technology. For the post 1990 generations technology is not only part of their life, it is indistinguishable from any other thing that they take for granted.

As providers of services to students, it is essential for UNITE not only to understand how current students use technology, but also to anticipate future needs. The UNITE Digital team have used the best of futures predictions both in technology and social attitudes, grounded in knowledge of historic trends, to predict these needs.

Picturegraphic and Infographic data sharing is already happening, but larger handsets with better memory, graphics cards and processors will allow ease of access of large data sets sent to mobile devices. It also has the potential to give students greater control over their environment through integrated apps, and this is certainly a consideration for those managing student accommodation.

Wearable technology, such as evolved watches or Glass or Bluetooth headset-style devices, will enable voice contact and screen use at the same time, with wider-spread 4G (and the inevitable 5G) networks giving consistent connectivity anywhere. Wi-Fi will thus start to become less important, so being in one space will too, and remote contact will grow even more. This raises the possibility of further reduced necessity on students being in the university itself as this technology develops. This is likely to have an impact on where students choose to live while studying.

Cloud based working will enable students, and also schools and universities, to work together, sharing best-practise and even lessons, lectures and courses online. They will be doing this not only in classes, but in the institution, with remote students and thereafter with students from other institutions in both their own country and around the world. Better cloud technology will allow faster, safer and more accurate data sharing and connection. The students won't think this a stretch at all, but the institutions might.

Collaboration will grow between students and institutions, but also with the learning itself, including the structure and the content of courses. User generated content already drives or underpins thousands of well-established news and information websites. This technology is therefore likely to give a further strong boost to the idea of students as co-creators and could fundamentally change the relationship between students and their institutions.

## WHAT NEXT?

Returning to the wider question about how students will live and learn in the future, there are still many questions that remain unanswered. We invite you to consider these questions, either in relation to the scenarios set out above, or your own strategic planning and futures work.

## Social uncertainties

- Will higher education be seen as a rite of passage, a luxury, or a requirement to secure employment?
- Will society need to redefine what it means by growth?
- What impact will social networks and new communities of interest have on how people live, work and learn?
- Will societies become competitive and individualistic or will they work collaboratively to tackle large-scale problems?

## Technological uncertainties

- What impact will the availability of information and online courses have on how, and where, people learn?
- Will technology mean that learning is less linked to place?
- How will the way people are taught at school affect their learning style?
- What level of technological sophistication will students want in their accommodation?
- What kind of technological sophistication will students demand in the construction of their accommodation?

## Economic uncertainties

- Will economic growth return across the developed economies or will the economy continue to suffer low or no growth?
- What impact will financial instability have on markets and student numbers?
- Will austerity create a new, prevailing consumer culture?
- Will an increasingly squeezed middle change the structure of the labour market?
- Will the economy be driven by local or global markets?
- Will financial pressures change the scale and location of universities?
- What kind of capital will universities have access to in the future?

## Environmental uncertainties

- What effect will climate change have on life in the UK?
- Will people change their behaviour to lead more sustainable, low carbon lifestyles?
- Will the cost of environmental adaptation increase public spending?
- Will the existing building stock need to have significant investment to become energy efficient?
- Will universities need to invest significantly in upgraded accommodation?

## Political uncertainties

- Will multinational corporations become more powerful and have more control over global economic change?
- Will Europe become stronger and more united, or will it weaken and break up?
- How might changing economic prosperity affect the demand for skills?
- How will nation states balance the different roles of regulator and funder of higher education?

## Education sector uncertainties

- Will university investment decisions be driven by short or long term considerations?
- How might economic uncertainty affect students' willingness, or ability, to leave home?
- Will corporates increasingly choose to take on talent at an earlier age and educate them in-house?
- Will students want different types of accommodation and lifestyle according to their learning needs and learning communities?
- What impact will stronger alternative providers have on higher education in the UK?

These questions, along with the scenario planning process, gave us the opportunity to consider our response to the trends and uncertainties that will shape the future. How students live has a significant influence on their overall student experience and cannot be separated from other academic and non-academic aspects. For this reason, we believe that engagement and dialogue between student accommodation providers, the HE sector and other relevant stakeholders is essential if we are to shape a student experience that continues to respond to the needs of students in the future, and reflects the culture and ethos of a world-leading HE sector. We invite you to continue to explore the questions and ideas we have raised through this project via [hefutures.wordpress.com](http://hefutures.wordpress.com)

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