

# Student Demand to 2035

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**HEPI Report 179**

## **About the author**

Bahram Bekhradnia established the Higher Education Policy Institute in 2002, and was its Director until December 2013 following which he became HEPI's first President. During his time as Director, he established HEPI as one of the most respected and highly referenced higher education think tanks in the world, advising governments in more than 25 different countries. Before establishing HEPI he was the Director of Policy for the Higher Education Funding Council for England (HEFCE) since its formation in 1992. While at HEFCE he was at the heart of many of the key developments affecting higher education during the decade. Before joining the Funding Council, he had spent his career in the Department of Education and Science (as it then was), leaving as an Assistant Secretary in 1991 to join the Universities Funding Council (later HEFCE).

## **Introduction**

Over the past 20 years, HEPI has produced a number of analyses of demand for higher education – which have identified some of the key drivers or potential drivers – and have made tentative assessments of likely developments in the future.

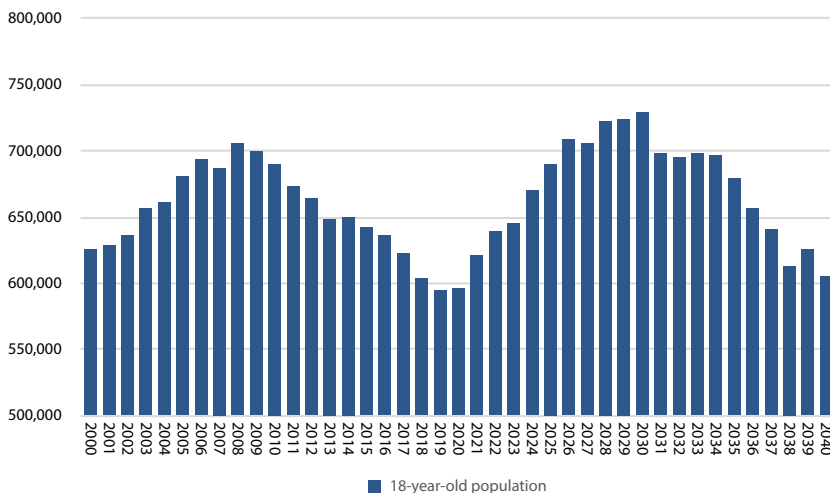
Since devolution, both the policies for higher education and the drivers of demand have diverged between the different parts of the United Kingdom. For that reason, this report is concerned with demand for higher education in England only. It is also concerned with domestic young undergraduate demand, and does not consider the question of demand from part-time students, nor from international students, nor from postgraduates which are all driven by quite different dynamics.<sup>1</sup> Full-time entrants represent nearly 85 per cent of the total of undergraduate students in our universities, and over 90 per cent of these are under 30 (nearly 80 per cent are 20 and younger).<sup>2</sup> Although it could be that others – mature students demanding university places or young people demanding apprenticeships, for example – might mitigate some of the decline in demand from 18-year-olds discussed below, 18-year-olds are likely to remain the dominant group in higher education as has been the case over the years and despite regular suggestions that older students and lifelong learners would in time become a major force.<sup>3</sup>

This present report is produced in a very different environment from that of previous reports. Until recently, there has been a steady increase in the desire of young people to enter higher education, and the proportion of young people doing so has increased steadily, even while their population was declining. In the last two admissions rounds that increase appears to have stalled. This HEPI Report therefore considers how demand may be changing, what the factors are that may influence future demand and the implications of all this for students, for institutions and for society more generally.<sup>4</sup>

### **Changing demand**

The main driver of demand for higher education is the young population and specifically the 18-year-old population, and changes in the 18-year-old population are the major determinants of changing numbers.

Figure 1 The 18-year-old population



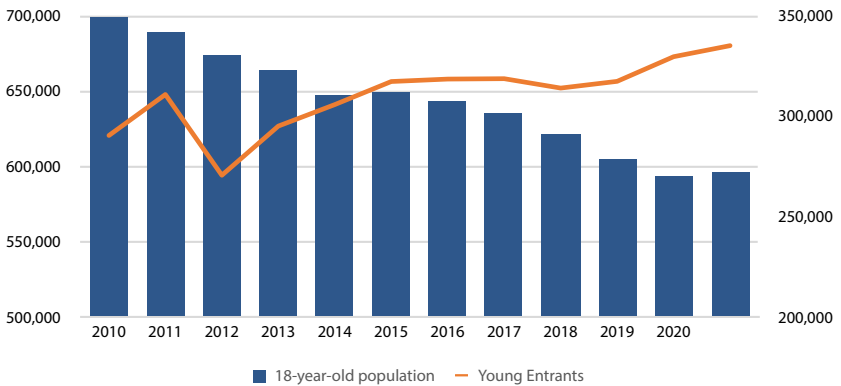
Source: Office for National Statistics, *Births in England and Wales: summary table. Live births, extrapolated to provide 18-year-old population – excluding deaths and migration* <https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/livebirths/datasets/birthsummarytables>

Figure 1 shows the changing 18-year-old population between 2000 and 2040, and how the number of 18-year-olds in the population increases between now and 2030, but then declines somewhat – by 7 per cent – between 2030 and 2035, and then by a further 12 per cent between 2035 and 2040, representing a total decline between the 2030 peak and 2040 of 17 per cent. In 2040 the 18-year-old population will be 10 per cent smaller than that in 2024.

All else being equal, it might be expected that demand at least from the young population would wax and wane in line with the growth and decline of these numbers. However, the relationship between the young population and higher education demand is not linear, as is seen in Figure 2, which shows that the number of 18-year-olds in higher education increased steadily over the years of the declining 18-year-old population between 2010 and 2020, independent of the changes in that population. In part this is because institutions have been creative in stimulating additional demand and government enabled expansion to occur, but

more particularly it is because the second key factor in demand for higher education is the desire of young people to go to university.<sup>5</sup>

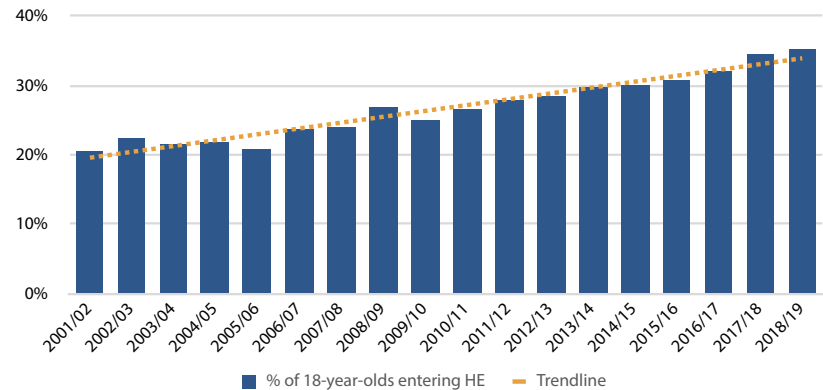
Figure 2 Young population versus young demand



Source: Population data from ONS as in Figure 1. Young Entrant (20 and younger) data from the Office for Students characteristics population datafile <https://www.officeforstudents.org.uk/data-and-analysis/student-characteristics-data/population-data-dashboard/>

Figure 3 is reproduced from data provided by the Department for Education (DfE) and shows a steadily rising trend in the participation of 18-year-olds between 2001/02 and 2018/19.

Figure 3 Percentage of 18-year-olds entering higher education

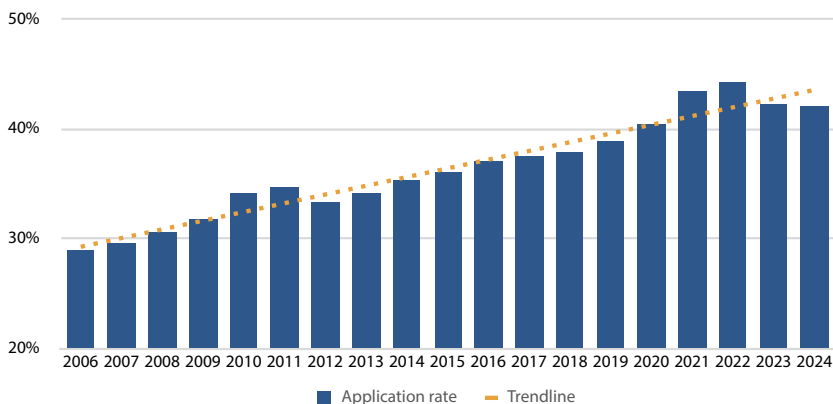


Source: Department for Education, Participation measures in higher education, Academic year 2021/22 <https://explore-education-statistics.service.gov.uk/find-statistics/participation-measures-in-higher-education#releaseHeadlines-tables>

Unfortunately, the DfE time series runs only until 2018/19. Nevertheless, it will be seen that there had been a steady increase in participation in the years of a declining 18-year-old population, as is implied by Figure 2.

UCAS data – based on the number of applicants rather than student numbers – are more up-to-date and give the same picture. Figure 4 shows the number of 18-year-old applicants as a percentage of the 18-year-old age group and, consistent with the Department for Education data, shows a steady increase in the application rate, declining in 2023 and 2024.<sup>6</sup>

Figure 4: Applicants to university as a percentage of the 18-year-old age group



Source: UCAS, 2024 cycle applicant figures - 30 June deadline <https://www.ucas.com/undergraduate-statistics-and-reports/ucas-undergraduate-releases/applicant-releases-2024-cycle/2024-cycle-applicant-figures-30-june-deadline>

Previous reports – not only by HEPI, but by others as well – were predicated upon continuation of the increasing desire of young people to go to university. The student number projections that were produced as a result now look as if they may be too high.<sup>7</sup> The applicant data from UCAS shown in Figure 4 illustrate this development well. The trendline also shows that, if the previous trend of increased applicants had been maintained, then the number of applicants would be rather higher in 2024.

A key question in assessing possible future demand therefore is whether the recent reduction in participation will prove to be a blip or if it is the beginning of a trend. Figure 4 shows that there have been disturbances to the upward trend in numbers in the past, but these were always for a

specific and identifiable reason. The reduction in 2012, for example, was attributable to an abnormal increase in demand in 2010 and 2011 from students who might normally have deferred entry, but who applied earlier than they would otherwise have done in order to avoid the steep fee increase in 2012. The substantial increases in 2021 and 2022 (and possibly the subsequent declines in 2023 and 2024) were very likely related to the uncertain environment created by the COVID-19 pandemic.

As discussed, the reversal over the recent past of the otherwise steady increase in the desire of young people to participate in higher education is largely unprecedented in the past three decades. Given the reversal of the growth of the young population after 2020, it could have serious consequences if the reasons are not understood and addressed. In the absence of research that would enable the reasons to be understood, some of the possible causes are explored below.

### **Possible reasons for the decline in demand**

#### *Cost*

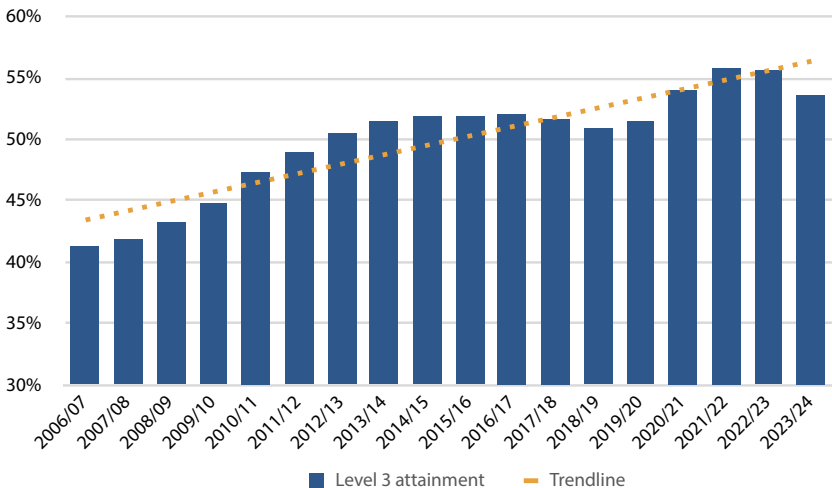
The cost of going to university is often mentioned as a likely reason for young people being put off pursuing higher education. And it would indeed not be unreasonable to speculate that the idea of leaving university with a 'debt' of upwards of £50,000 might put off young people. Following the trebling of fees from 2012 there were confident assertions – some based on surveys of the attitudes of young people to debt – that young people, especially those from disadvantaged backgrounds, would be deterred from higher education.<sup>8</sup> But despite the foreboding, until recently the reality has been that participation has continued to rise in spite of the higher fee – and indeed in real terms the cost has reduced greatly – the £9,000 fee of 2012 will by 2025 have reduced to £5,800 in real terms.<sup>9</sup> The trendline in Figure 4 shows that participation continued more or less exactly in line with trends following the 2012 and 2013 blip. So there seems no obvious reason why the fee should suddenly prove to be a deterrent, now that the real terms cost has reduced.

The student fee is only one element of the cost of attending university. The other is the cost of living while at university. Whereas the real terms cost of student fees to the student has reduced, the cost of living has not. Although maintenance loans have in principle risen to match, this itself may have had a negative impact on potential students.

## School achievement

In most cases, for young people to be able to attend higher education they need to achieve at school. If school achievement had declined that would provide a reason for participation in higher education to fall in parallel. However, there is no consistent sign of such a fall. Figure 5 shows Level 3 achievement over time: it has increased steadily, although the improvement does appear to be slightly more volatile than the rates of higher education participation shown above. It remains to be seen if the slight reduction in attainment in 2023/24 represents a permanent halt to the improvements.

Figure 5: Percentage of Level 3 attainment by age 18 in England between 2006/07 and 2023/24



Source: Department for Education, Level 2 and 3 attainment age 16 to 25 <https://explore-education-statistics.service.gov.uk/find-statistics/level/2-and/3-attainment-by-young-people-aged-19>

Some adjustment has to be made for the COVID-related changes in Level 3 marking, but it does not appear from the trendline that there has been a decline in school achievement that would explain the drop in higher education participation; nor does it provide any indication that higher education participation is likely to decline for that reason in future.



## *Economic considerations*

The state of the economy, and the employment market in particular, are sometimes claimed to have an impact on the desire of young people to attend university. The argument is put both ways – a buoyant economy is sometimes said to encourage young people to go straight to work rather than study. The contrary is also claimed – that in hard economic times to spend three years out of the job market studying is less attractive than to take whatever employment is available.

## *COVID*

Data relating to the disruption of the higher education landscape by COVID provide some evidence that would suggest the recent downturn is a blip rather than a trend. The trendline in Figure 4 shows that in both 2021 and 2022 numbers increased beyond the trendline, and that the subsequent two years saw recruitment below the trendline. It might not be surprising if recruitment closer to the trend were to resume subsequently.

## *Hostile environment*

Universities have been the victims of recent culture wars, with statements by government ministers – including the former Prime Minister, Rishi Sunak, speaking about ‘rip off degrees’ – and much of the printed press, to the effect that many university courses are not worth pursuing, sometimes with the explicit suggestion that going to university at all is not worthwhile.<sup>10</sup> Whatever the basis for such sentiments, the extraordinary language and hostility displayed towards universities might well have created an atmosphere where potential students who might otherwise have gone to university – and their parents – become sceptical about the value of doing so.

This generally negative – hostile even – narrative is reinforced by the government and its agencies (the Office for Students in particular) judging the success of higher education and individual universities primarily according to measures like the salaries obtained by graduates, and non-completion rates – without reference to contextual or benchmark data. And it is difficult to find any references to the lifelong benefits – not just pecuniary but non-financial – of attending university, for which there is extensive international evidence.<sup>11</sup> The benefits to the individual, and to

the nation as a whole, of a better educated population with better health, less criminality, better parenting, more domestic stability and greater social engagement – all of which are evidenced by research, not just in this country but overseas as well – have been sacrificed to crude measures of initial salaries on graduation, dropout rates and so on.

### *The limits of participation?*

A final consideration worth mentioning, if only to dismiss it, is that participation may have reached a natural limit, and that universities are now saturated with students who have the ability to benefit from higher education – after all higher education is meant to be ‘higher’, and so it would seem logical that there should be a limit.

However, it is unlikely that we have yet reached such a natural limit to participation. First, as already mentioned, Level 3 successes continue to rise – including academic A Levels – and so the pool of those who are likely to be able to benefit from higher education is greater than those who are currently participating. Secondly, even if the hypothesis were true, it might explain why any increase in participation has stalled but would not explain why there has been a decline.

Relevant also to this consideration is the research that shows a mother’s participation in higher education has a major influence on whether a child subsequently participates.<sup>12</sup> The rapid growth in the number of women participating in higher education began in the early 1990s, and in 1995 women outnumbered men for the first time, continuing to do so since. Given also that graduate women on average begin families relatively late (on average around the age of 32), it could be that the impact of the graduate-mothers’ phenomenon will begin to impact positively higher education participation in the near future, perhaps offsetting the recent declines.<sup>13</sup>

But most telling is the fact that even despite the steady growth in participation in England over recent years, participation nevertheless remains well behind a number of other Western countries. According to OECD data the rate of HE participation in the United Kingdom is not exceptionally high (and even within the United Kingdom applicants to UCAS from England represented 42 per cent of the young English population whereas from Northern Ireland they represented 50 per cent

of the young Northern Irish population).<sup>14</sup> Unless there are reasons for thinking that young people in England are less capable of benefiting from higher education than those from other countries, there is no reason for believing that participation in England has reached a natural limit – and indeed there would seem to be scope for significant further increases.

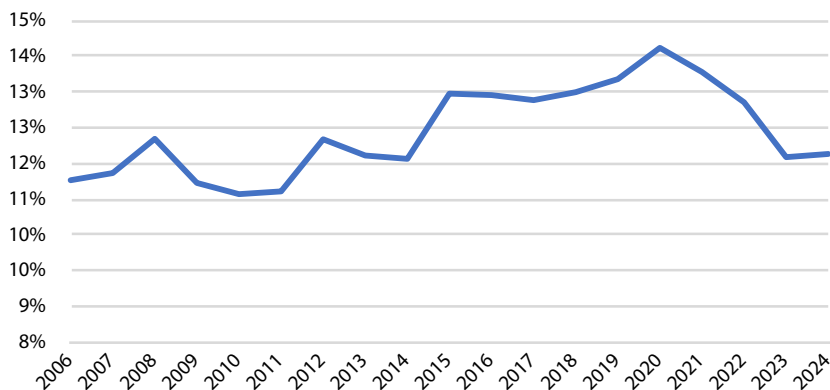
### Some consequences

There are two groups whose participation in higher education is significantly lower than their peers: young males on the one hand and young people from disadvantaged backgrounds on the other.

#### Males

As far as young men are concerned, Figure 6 shows the extent to which their participation in higher education is lower than that of females.

Figure 6 Gap between female and male participation



Source: UCAS, 2024 cycle applicant figures - 31 January deadline <https://www.ucas.com/undergraduate-statistics-and-reports/ucas-undergraduaterelases/applicant-releases-2024-cycle/2024-cycle-applicant-figures-31-january-deadline>

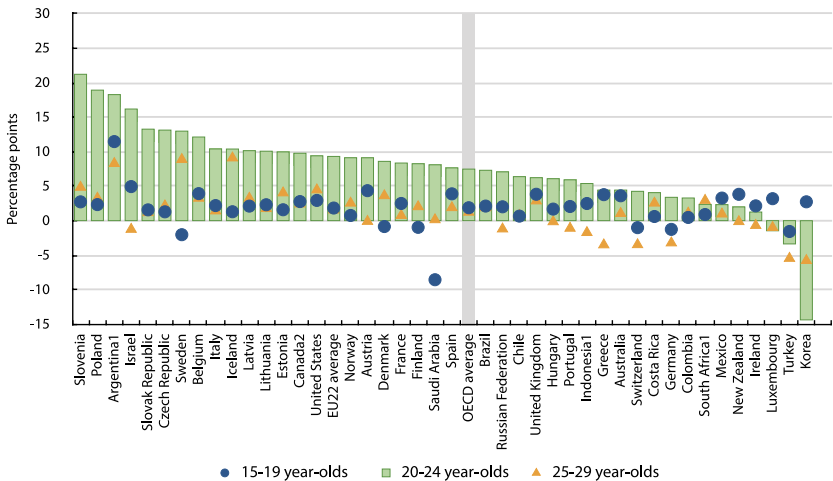
In 2006, 44 per cent of those applying for entry to higher education were men and 56 per cent were women. In 2024, the proportions were almost exactly the same. Figure 6 shows there has been some movement both up and down, but fundamentally the situation is static – a difference between male and female participation of around 27 per cent. The gap remains substantial – and considering that the young male population is

5 per cent larger than the female (reflecting the fact there are consistently 5 per cent more boys born than girls) then it would take an increase in male applicants of 36 per cent to match the application rate of females.<sup>15</sup> In terms of changes in the past two years where the overall participation rate has reduced, the reversal in the growth in participation more generally has not unduly impacted on young males. The deficit is as great but no greater than might be expected based on past trends.

A narrowing of the gap in participation between male and female students could bring about a large increase in demand. However such a narrowing is not, unfortunately, something that can be confidently anticipated, not least because a similar gap is observed in the Level 3 achievements of male and female school pupils, which has stayed stubbornly unchanged over the years. The gap in performance has also never received sustained focus from the Department for Education.

The gap between male and female educational performance is not limited to the UK – it is a worldwide phenomenon and, as is shown in Figure 7, the gap between male and female performance in the UK is actually slightly below the average in the countries studied by the OECD.

Figure 7: Gap between male and female participation in higher education

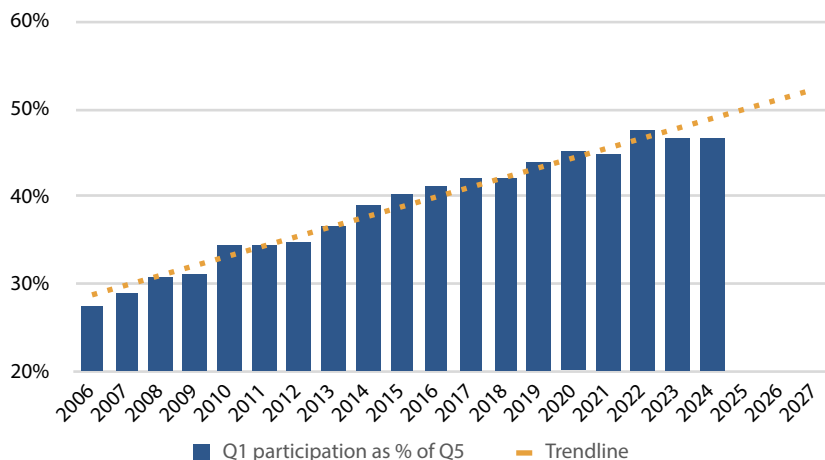


Source: OECD Education at a Glance 2021, Figure B1.1

## Disadvantaged students

The picture in respect of the participation of disadvantaged students is different. Figure 8 shows that, although participation in higher education by the least advantaged (Quintile 1) continues to be well below that of the more advantaged quintiles, there has been a rapid catching up over the past two decades.<sup>16</sup> Whereas 18 years ago, a young person from Quintile 5 was nearly four times more likely to go to university than one from Quintile 1, by 2022 the gap had reduced to just over twice as likely.<sup>17</sup>

Figure 8: Likelihood of Quintile 1 going to university versus Quintile 5

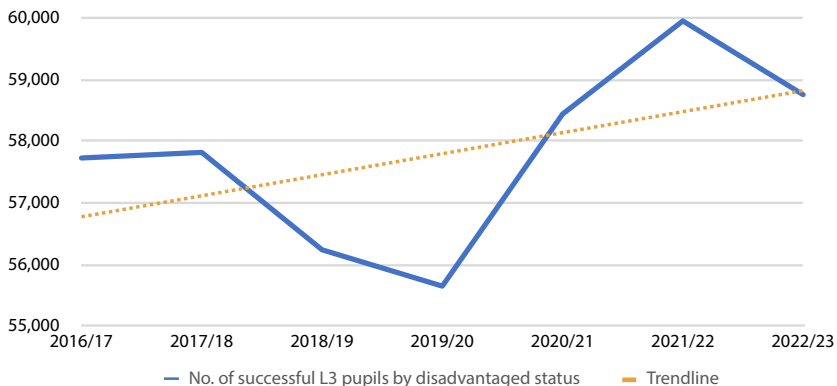


Source: UCAS, 2024 cycle applicant figures – 30 June deadline <https://www.ucas.com/undergraduate-statistics-and-reports/ucas-undergraduate-releases/applicant-releases-2024-cycle/2024-cycle-applicant-figures-30-june-deadline>

Also relevant is the fact that the performance of disadvantaged students at school has also been steadily improving, as illustrated in Figure 9.

However, Figure 8 also shows that the gap in HE participation by the least advantaged has increased since 2022 – a unique occurrence in recent years – and given the steady narrowing of that gap until then, it can be seen from the trendline that the recent slowdown has disproportionately affected the most disadvantaged. This would appear to reflect the late Sir David Watson’s dictum that widening participation only occurs when the system as a whole grows.<sup>18</sup>

Figure 9: Level 3 successes by pupils with free school meals



Source: Department for Education, A Level and other 16 to 18 results, 18 April 2024 <https://explore-education-statistics.service.gov.uk/find-statistics/a-level-and-other-16-to-18-results>

Nevertheless, given that a prerequisite of participation in higher education is generally to have achieved Level 3 qualifications at school, Figure 9 illustrates why HE participation by disadvantaged students has improved so rapidly. The trendline suggests that if policy and other circumstances permit, the improvement should continue, notwithstanding the recent reversal.

### *Institutions*

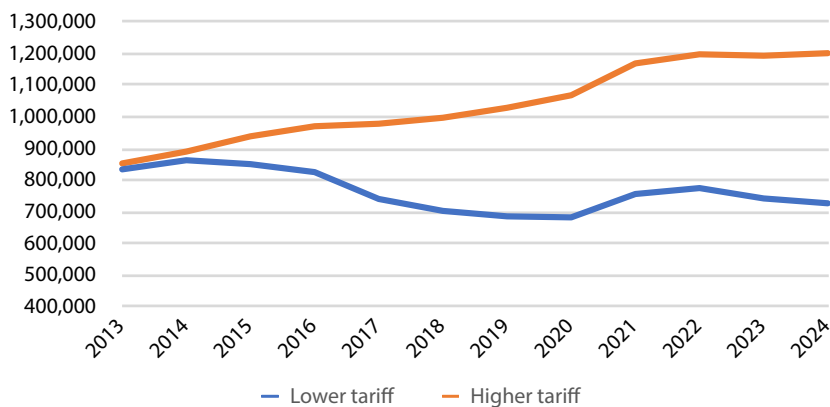
Besides the differential impact on different groups of students, the slowdown in growth (which is reflected not just in the reduction in the rate of participation of young people, but in absolute numbers of entrants into higher education as well) has impacted different groups of universities differently. In particular, the most prestigious universities – those with the greatest appeal to students because of their reputation, if not their quality – have managed to retain and even to increase their student numbers.

These universities argue that in order to continue to be financially viable they have to recruit additional students or at least maintain their numbers, even at the expense of diluting their entry standards. They point, reasonably, to the impact of the cost-of-living crisis, and in particular to the substantial decline in the value of the student fee which has reduced so substantially since it was set at £9,250 in 2017.<sup>19</sup> Changes in demand from overseas

have sometimes led to spare capacity. The way that they have responded – not in all cases, but to a large extent – has been by lowering their entry requirements and so widening the pool of students eligible for entry to their universities. And given the reduction in overall participation, by doing so they have effectively reduced the number of students available to be admitted to other, less prestigious, universities. These institutions have been hit by the same cost-of-living crisis and the reduction in income from the fee but now face the additional problem of declining student numbers.

Figure 10 shows the impact of the response of the higher tariff universities. It shows that whereas 10 years ago the number of applications to low- and high-tariff institutions were similar, in 2024, high-tariff institutions received 65 per cent more applications than low tariff. It should be noted that these figures represent applications, not admissions, but applications are generally made in response to the tariff requirements of the institutions concerned.

Figure 10: Time series of applications to higher and lower tariff institutions



Source: UCAS, 2024 cycle applicant figures - 31 January deadline <https://www.ucas.com/undergraduate-statistics-and-reports/ucas-undergraduate-releases/applicant-releases-2024-cycle/2024-cycle-applicant-figures-31-january-deadline>

Without commenting on the internal justification for such behaviour, it is this as much as anything else that contributed to the increasing numbers of universities whose financial viability is in question. For a number of years, universities were subject to student number controls, both to

reduce the pressure on public finances but also to safeguard the quality of the education they were able to provide to students. Now, in order to reduce the damage that is being done to the sector as a whole, there is an urgent national interest argument for controlling the number of students that can be recruited by individual universities. The country needs all its universities to thrive, not just the most prestigious which cater for a minority of students. Unfortunate though such a measure may be, it would be preferable to allowing perfectly good universities – some providing education of very high quality – to decline.

Unfortunately, the Office for Students has little concern in the national interest. It was established as an act of ideology – that argued that education was a product, that students were consumers of that product and that an Office for Students was needed in order to protect consumers, in exactly the same way as an Office for Water or Gas was needed to protect the interests of consumers. In the same way as those other regulators have little concern for the national interest, and are focused entirely on ‘consumers’, the same it seems goes for the Office for Students. At one time – in 2020 – the Office for Students was apparently considering imposing student number controls, but that brief flurry of interest went nowhere.<sup>20</sup> If there are to be student number controls they will need to be carefully constructed, but some form of control is required to ensure that the sector as a whole is able to thrive.

## **Conclusion**

It is not the purpose of this report to provide firm estimates of future demand. The external environment has changed substantially from 2018, when we were able to make assumptions about the continuing desire of young people to go to university and project with reasonable confidence the trajectory of student demand. The main uncertainty in looking forward now concerns whether the reversal of the increasing participation that has been seen over the last generation (or more) has halted, or whether the present reversal proves to be a temporary blip and previous trends will be resumed. If it proves to be the case that the previous steadily increasing demand from young people has reached a permanent plateau, then demand from young people in future will depend entirely on demography. In that case, assuming that the participation rate remains at its present level, then young demand should continue to rise (by about 8 per cent – 25,000) between now and



2030 and then by 2035 fall by about 7 per cent (20,000) from the 2030 peak – just slightly (about 4,000) above present (2024) levels.<sup>21</sup>

Adding to the level of uncertainty is the disparity in the participation of males and also students from disadvantaged backgrounds. Taking the latter first, Figure 8 shows there has, until the recent reversal, been a steady improvement in the participation of disadvantaged students (identified by UCAS and others as Quintile 1) – more rapid than the overall increase in the rate of participation by the young population as a whole. If the trend of improvement in the participation of such students were to resume – even if the participation of students in other quintiles were to remain unchanged – then that would lead to 10,000 or so more applicants in 2035 than would have been the case.

The second disparity concerns the participation of young men. If young male participation were to increase to the extent that the gap between male and female participation were to halve between now and 2035, that would lead to an increase of 20,000, even if there were no changes in the participation of females. This would mean there would be no decline in numbers between now and 2035 – indeed there would be an increase of about 15,000. However, although there is no reason to think that young males are intrinsically less able than young females, the fact that the underperformance of males appears to be a worldwide phenomenon makes it less likely that it will be easily shifted in this country.

Although the improvement in the participation of disadvantaged students isprecedented, whereas that of young males would be novel, and so the former would seem to be more plausible than the latter, neither can be taken for granted. But this analysis does show the extent of uncertainty, and because there is no reason to think young men are less able than young women nor that those from disadvantaged backgrounds are less able than their better-off peers, there are reasonable grounds for thinking that over time some catching up will occur.

So prospects for student numbers in the future look highly uncertain. If there is no improvement in participation then demand will reduce after 2030, implying a very bleak outlook for many universities, which will be exacerbated if some mechanism is not introduced to limit the ability of others to recruit students at their expense.

On the other hand, if participation growth resumes – and quite apart from the possibility that young males and students from poorer backgrounds will reduce the present disparities in participation – and taking into account in particular that participation in England remains significantly below that of some other comparable places (including, within Great Britain, Northern Ireland), that could offset the impact of demographic decline from 2030. If so, numbers would be unlikely to fall below current levels.

## Endnotes

- 1 Most of the discussion and figures in this report relate to 18-year-olds, and on the occasions where 'young' refers to those aged 18 to 21 that is made explicit.
- 2 UCAS accepted applicant data from UCAS undergraduate end of cycle data resources 2023.
- 3 It should be noted that the numbers discussed in this report include students on BTEC courses whose funding was due to be withdrawn under the previous government, but whose funding now looks somewhat more secure. No allowance has been made for any changes in demand for BTEC courses.
- 4 In this report the number of individual applicants to UCAS are taken to represent 'demand'. Unless otherwise stated, the data used are provided by UCAS.
- 5 In this report the terms 'university' and 'higher education' are used interchangeably, although it is acknowledged that higher education includes non-university institutions and activity.
- 6 However, over time, there has been an increase in the number of students pursuing degree apprenticeships (not included in the UCAS data). According to data provided by the Office for Students the number of such students has risen to nearly 2 per cent of the student population – a substantial increase but still far too small a number to impact on the big picture.
- 7 Most recently by UCAS in *Journey to a Million* <https://www.ucas.com/about-us/journey-million>
- 8 Claire Callender and Jon Jackson, *Fear of debt and Higher Education participation*, Families & Social Capital ESRC Research Group Working Paper No.9, London South Bank University, November 2004 [https://www.lsbu.ac.uk/\\_data/assets/pdf\\_file/0019/9334/fear-debt-higher-education-families-research-working-paper.pdf](https://www.lsbu.ac.uk/_data/assets/pdf_file/0019/9334/fear-debt-higher-education-families-research-working-paper.pdf)
- 9 Universities UK, *Sustainable university funding: Why it is important and what is needed*, September 2023 <https://www.universitiesuk.ac.uk/sites/default/files/uploads/Reports/Sustainable-university-funding.pdf>
- 10 Department for Education Press Release 17 July 2023 - <https://www.gov.uk/government/news/crackdown-on-rip-off-university-degrees>
- 11 See for example Neil M Davies et al 'The causal effects of education on adult health, mortality and income: evidence from Mendelian randomization and the raising of the school leaving age', *International Journal of Epidemiology*, Volume 52, Issue 6, pp.1878-1886.
- 12 See, for example, Yang Hu and Yue Qian, 'Gender, education expansion and intergenerational educational mobility around the world', *Nature Human Behaviour*, Volume 7, Issue 4, March 2023, pp.583-595 <https://www.nature.com/articles/s41562-023-01545-5>
- 13 Office for National Statistics, 'Mean age of mother at birth of first child, by highest achieved educational qualification, 1996 to 2016, England and Wales', Response to FoI (Freedom of Information) request
- 14 OECD, *Education at a Glance*, 2022, Table B1.3; UCAS January Deadline 2024
- 15 The application rate is the number of applicants divided by size of the relevant population. This is described here variously as the application rate and the participation rate.

- 16 The identification of relative advantage and disadvantage used here is based on the POLAR classification which identifies five groups of geographic localities based loosely on economic factors, with Quintile 5 being the most advantaged and Quintile 1 being the most disadvantaged.
- 17 Though the gap has widened again slightly in the two subsequent years.
- 18 David Watson, '*Only connect: Is there still a higher education sector?*', HEPI Occasional Paper 8, July 2014 <https://www.hepi.ac.uk/2014/07/24/connect-still-higher-education-sector/>
- 19 Taking inflation into account, the fee that each home undergraduate student provides, which was worth £9,000 per year in 2012 will be worth only £5,800 in 2025 today, even allowing for the increase in the fee to £9,250 in 2017.
- 20 Not on its own initiative, it has to be said, but at the behest of the Government. In a blog for HEPI in May 2020 the author of this report wrote, 'The Office for Students ... has been told it must require institutions to behave in ways which do not damage "the stability and / or integrity of the English HE sector". Yes, its conditions of registration must include the requirement that universities must behave in a way that protects the interests of the sector, a concept that has hitherto been absent from its thoughts and actions'. From Bahram Bekhradnia, 'Why the new student number cap is unworkable, by Bahram Bekhradnia', HEPI Blog, 5 May 2020 <https://www.hepi.ac.uk/2020/05/05/why-the-new-student-number-cap-wont-work-by-bahram-bekhradnia/>
- 21 It should be noted though that while these calculations are between 2024 and 2035, the demographic decline accelerates after 2035 and in 2040 the 18-year-old population will be 10 per cent smaller than in 2024 and 17 per cent smaller than in 2030.





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**This report from Bahram Bekhradnia, HEPI's President, is the latest in a series of HEPI reports on future demand for higher education. It looks at the various factors which may affect participation in higher education by home students in England up to 2035.**



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