

**MAYOR OF LONDON**

# Mayor's Academic Forum

Meeting 2 December 2016



## Aim of Academic Forum

To support implementation of London Plan Policy 3.8 Bh, which recognises that specialist student provision could give rise to concerns over:

- the loss of capacity for conventional homes, especially affordable family housing
  - the need to secure mixed and balanced communities
  - the scope for identifying land suitable for student accommodation
  - the cost of purpose built student accommodation, and
  - the way these issues are expressed in parts of inner London
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- Support the development of London Plan policies for London's HE sector

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## Methodology for projecting HE student numbers: Composition of London's student population – institutions

London Full-time student numbers in 2011/12				
Academic year 2011/12	London University HESA students	Other students estimate	ALL students	London University HESA students as a proportion of all students
Undergraduate students	219,735	24,461	244,196	91%
Postgraduate students	74,820	24,107	98,927	76%
Total student numbers	294,555	48,569	343,124	86%

**London University HESA students:** students accounted in the Higher Education Statistics Agency data for London Universities = students that attend London universities funded by the Higher Education Funding Council for England (non-London campuses may be HEFCE funded, but are not captured in London's HESA data).

**Other students:** those at London campus branches of non-London universities, alternative providers and international exchange students from Study Abroad and Erasmus.

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## Methodology for projecting HE student numbers: Composition of London's student population – country of domicile and sources of information

HESA students data can be disaggregated to:

- UK domiciled (UG & PG)
- EU (non-UK) domiciled (UG & PG)
- All other overseas domiciled (UG & PG)

### Other students estimate

- based varied data sources collated by London Higher & ULHS
  - Private and alternative providers
  - Erasmus
  - Association of American Study Aboard Programme
  - 2013 - Campus Branches (approx. 20 campuses branches) e.g. UEA London, Glasgow Caledonian London, Coventry London, Northumbria London
- UK domiciled + EU (non-UK) domiciled + All other overseas domiciled (UG & PG)

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## Methodology for projecting HE student numbers: Composition of London's student population

London Plan previous estimate (2013) of HE students used

London University HESA students :

- UK domiciled full time undergraduate
- UK domiciled full time postgraduate
- All overseas domiciled full-time undergraduates (including EU)
- All overseas domiciled full time postgraduate (including EU)

Other students

- All undergraduate
- All postgraduate

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## Methodology for projecting HE student numbers: Growth scenarios used in 2013

### High growth

- The high growth projection was based on the ‘rolling average’ of the historic London HESA data (from 1995/96 to 2011/12) for UK domiciled fulltime UG and PG students
  - = annual growth rate of roughly 2% UG and 4% PG
- And 4.7% annual growth rate for All overseas domiciled fulltime UG and PG (including EU
  - 4.7% recommended by the British Councils growth assumptions for international students.
- “Other students” **not** included

As this approach uses a proportional growth rate, the **amount of change in the actual number grows larger with every passing year.**

## Methodology for projecting HE student numbers: Growth scenarios used in 2013

### Low growth

- Based on a 'constant' growth approach, assuming that the student population will grow at a constant amount per year from 2012/13 to 2026/27.
- Took account of the number of London HESA students and "Other students".
- 3 variant projections were used to provide a more nuanced understanding of the low growth assumption.

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## Methodology for projecting HE student numbers:

### Growth scenarios used in 2013

#### Low growth

- **Variant 1.** Constant annual increase for each of

based on average growth from 1995/96 to 2011/12

+

Other students

(proportion HESA students are of all students in 2011/12 ≈86%)

UK Domiciled full-time under-graduates	All overseas domiciled full-time under-graduates	UK Domiciled full-time post-graduates	All overseas domiciled full-time post-graduates
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- **Variant 2.** Same as V1 but constant increase for

UK Domiciled full-time undergraduates	UK Domiciled full-time postgraduates
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- Based on average these groups are of all UK 18-20 population in 2009/10, 2010/11, and 2011/12
- To factor in 18-20 age group reduction in the UK population



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## Methodology for projecting HE student numbers:

### Growth scenarios used in 2013

#### Low growth

- **Variant 3.** Same as V2 but constant increase for 

UK Domiciled full-time undergraduates	UK Domiciled full-time postgraduates
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  - Based on average these groups are of all UK 18-20 population in 2011/12 only

#### Medium growth

- Mid-point between high and low chosen

Projected full-time student numbers in 2026/27			
Academic year 2026/27	Variant 1:	Variant 2:	Variant 3:
High growth	487,317	487,317	487,317
Medium growth	485,916	457,521	458,354
Low growth	484,515	427,724	429,391

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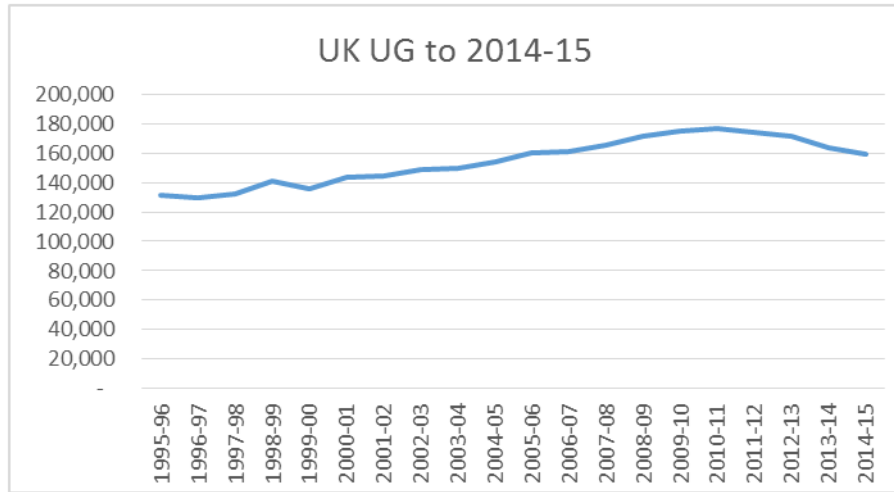
## Methodology for projecting HE student numbers: Growth scenarios used in 2013

### Medium growth

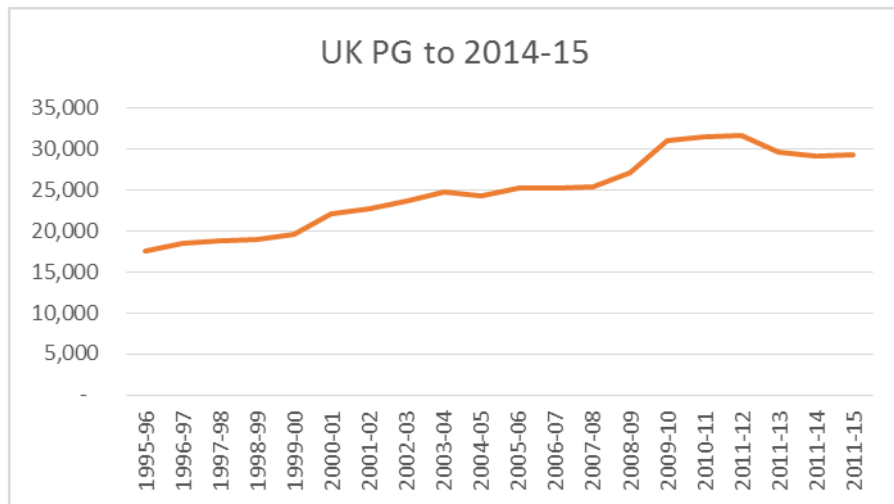
<b>Annual increment to full-time student numbers between 2011/12 and 2026/2027</b>			
	<b>Variant 1:</b>	<b>Variant 2:</b>	<b>Variant 3:</b>
High growth	9,613	9,613	9,613
Medium growth	9,519	7,626	7,682
Low growth	9,426	5,640	5,751

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## Current HE Student numbers – UK domiciled (HESA)

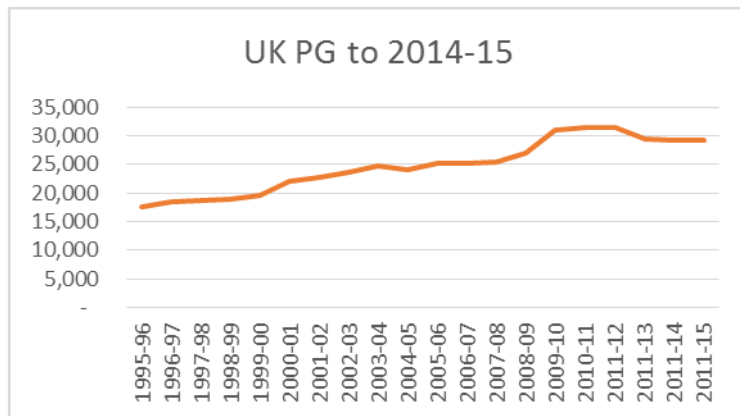
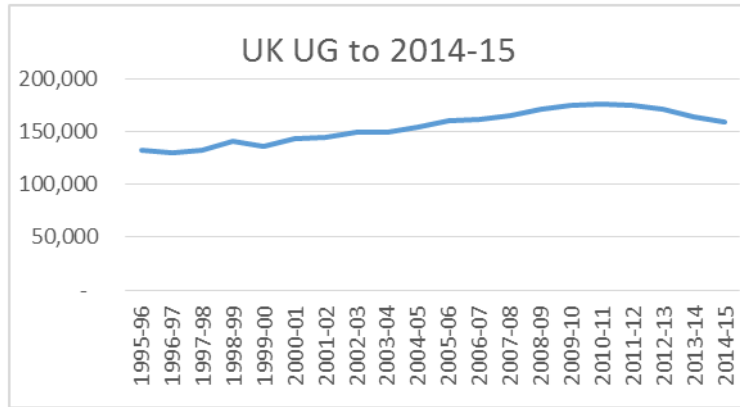


Full time UK domiciled HE students		
Year	UG	PG
2009-10	175,260	30,990
2010-11	176,555	31,400
2011-12	174,305	31,570
2012-13	171,310	29,500
2013-14	163,370	29,175
2014-15	159,335	29,225



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## Current HE Student numbers – UK domiciled (HESA)



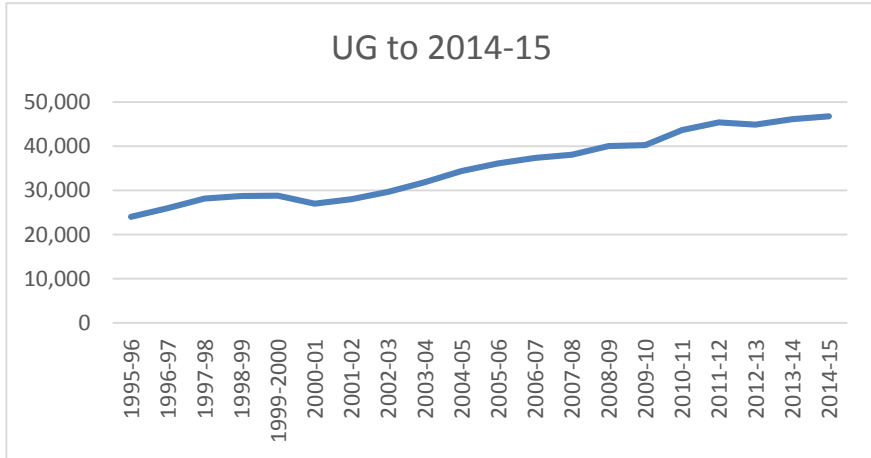
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Low Growth - UK UG			
	V1	V2	V3
2012-13	176,541	168,699	170,481
2013-14	178,778	166,278	168,035
2014-15	181,014	164,989	166,732

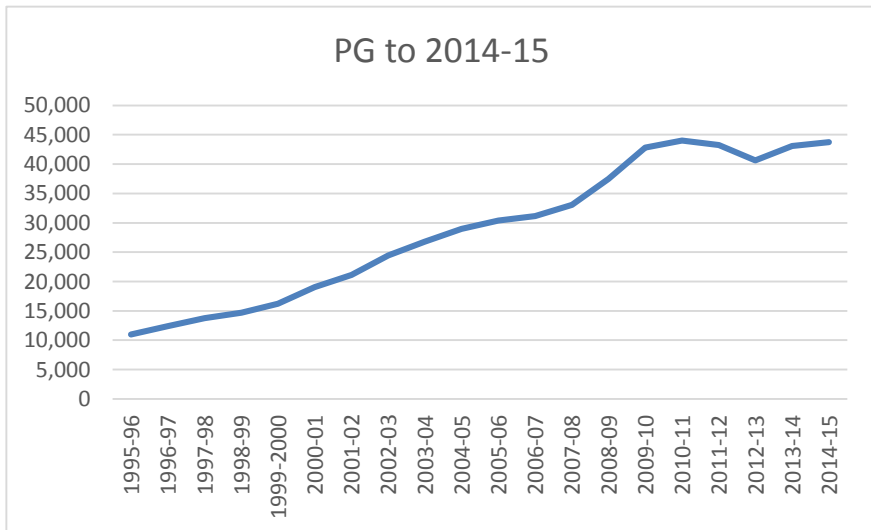
Low Growth – UK PG			
	V1	V2	V3
2012-13	33,109	33,047	32,687
2013-14	34,648	33,828	33,460
2014-15	36,186	34,078	33,707

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## Current HE Student numbers – All overseas (HESA)



Year	UG FT	PG FT
2009-10	40,303	42,829
2010-11	43,723	44,028
2011-12	45,433	43,247
2012-13	44,949	40,606
2013-14	46,146	43,061
2014-15	46,809	43,763



Low Growth – Overseas FT

	UG	PG
2012-13	47,244	45,794
2013-14	49,068	48,338
2014-15	50,891	50,881

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## What scenario should we use in the projections?

Repeat 2013 method with updated data to 2015?

- This will take account of recent decline

How to handle BREXIT?

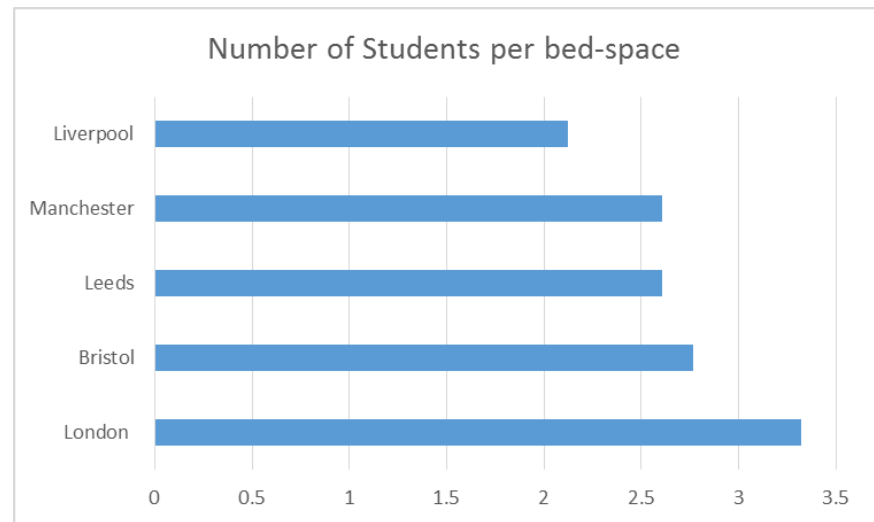
- Split all overseas domiciled full-time by EU and non-EU
- Trump = USA less favourable HE destination?

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## What percentage of students should be accommodated in PBSA?

- Currently aiming to accommodate 26% and 33% of growth = annual bed spaces requirement of 2,000 and 3,100

- Aim for bed/student target ?
  - Would need another 23,000 bed-spaces to catch up with supply in Manchester



Identify number of students likely to need PBSA?

- First year UG: UK non-Londoners + overseas
- PG masters: UK non Londoners + overseas

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## Affordable student accommodation policy

- Keep current approach?



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5. University led regeneration lessons from USA
6. What other HE sector policies are needed in the London Plan?
7. Next steps

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## London Development Pipeline (August 2016)

Stage of planning	Total no. of bedrooms
Application submitted (no decision yet)	3,210
Application submitted (consent granted)	6,426
Planning consent granted and construction underway	3,585
<b>TOTAL pipeline</b>	<b>13,221</b>

Knight Frank: London Market Report on Student Accommodation August 2016