

THE CHANGING NATURE OF THE UK HIGHER EDUCATION STUDENT POPULATION

THE CURRENT PICTURE OF THE UK HIGHER EDUCATION STUDENT POPULATION

Participation among 18-year-olds increased steadily for around two decades, with UCAS application rates rising consistently as a share of the 18-year-old population from 2006 to 2021. However, this long upward trend has recently levelled off, with participation stalling and showing a slight decline in 2023–2024 (Bekhradnia, 2024). ONS population estimates indicate that there are approximately 850,000–900,000 18-year-olds in the UK, with a relatively even gender split and a slight male majority, reflecting broader population demographics. In contrast, higher education participation remains disproportionately female, with women continuing to make up a larger share of undergraduate enrolments than men.

According to the latest official HESA data for 2024/25, the UK has 2.86 million students enrolled in higher education, slightly down from about 2.9 million in 2023/2024. Undergraduate numbers have increased from 2023–2024 to approximately 2,066,630, while postgraduate numbers have declined to around 796,550. This means undergraduates currently make up about 72% to 73% of all HE students in 2024/25. Universities UK data shows that around 79% of students study full-time, indicating that most students are embedded in regular campus-based study patterns. The student body includes large numbers of both domestic and international students, reflecting a wide mix of backgrounds and experiences. International students make up one quarter of total enrolments.¹

HESA data also reports clear patterns in students' ethnic backgrounds, with White students accounting for about 70% of the population of known ethnicity in 2023–24, and 68% of all students of known ethnicity in 2024/25. When comparing to the national population, the 2021 Census for England and Wales show that about 81.7% of the population identified as White, approximately 12% higher than the figure for the UK student population three years later.² This figure has been gradually decreasing over recent years, indicating growing diversity in who participates in higher education.

Around one in five (≈20 %) higher education students in England reported having a disability in 2023/24, indicating that disabled students form a significant minority of the HE population.³

¹ UK Parliament / House of Commons Library - "Higher education student numbers – UK Parliament research briefing"

² <https://www.ethnicity-facts-figures.service.gov.uk/uk-population-by-ethnicity/national-and-regional-populations/population-of-england-and-wales/latest>

³ <https://www.officeforstudents.org.uk/publications/one-size-doesn-t-fit-all-equality-of-opportunity-for-disabled-students/>

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The UK student population remains large and demographically diverse, factors that universities and educational institutions must consider when planning inclusive sport and physical activity provision.

Current participation patterns also reflect ongoing structural inequalities and demographic trends. The gender profile of higher education applicants has remained consistently skewed towards women, with around 56% of applicants identifying as female and 44% male -- a pattern that has changed little since the mid-2000s⁴. Young men remain underrepresented in higher education, and achieving gender balance would require a substantial increase in male participation. However, recent BUCS statistics show that 40% of BUCS sport participants are women and 59.2% are men, and so despite there being fewer men in higher education, a higher proportion of men are competing in BUCS sport, compared to women. This has implications for university sport, where provision must both address female participation barriers in competition and ensure provision is inclusive and accessible to drive participation amongst all students. It is to be noted, however, that this statistic shows participation in BUCS competition, and doesn't account for the whole picture of sport participation in higher education.

There has also been some progress in widening university participation by socioeconomic background. Participation among students from the most disadvantaged areas has improved over time, with the gap in higher education entry narrowing significantly compared to previous decades. However, recent data suggest that this gap has begun to widen again since 2022, likely reflecting cost-of-living pressures. This indicates that financial constraints remain a key factor shaping who enters higher education, and by extension who accesses university sport and physical activity opportunities.

London institutions are enrolling a higher number of students from a wide range of ethnic, cultural, and socio-economic backgrounds, and this diversity is more pronounced than in many other parts of the UK. However, inequalities remain visible. Students from lower-income backgrounds in London are still underrepresented in higher education relative to more advantaged peers. This mirrors national concerns about widening participation and supports HEPI's observation that cost and access continue to shape who enters higher education. In the context of sport and physical activity, this has clear relevance for affordability, accessibility, and inclusive programme design.⁵

EXPECTED CHANGES IN THE HIGHER EDUCATION STUDENT POPULATION ACROSS THE UK

Forecasts for the next decade suggest that the profile and size of the university student population are likely to change in ways that have implications for student engagement, including participation in sport and physical activity. Evidence from the Higher Education Policy

⁴ UCAS (2024). *UCAS Undergraduate reports by sex, area background and ethnic group*; House of Commons Library (2026). *Higher education student numbers*.

⁵ (<https://www.londonhigher.ac.uk/wp-content/uploads/2025/02/Hyper-diversity-revisited-Londons-student-population-in-2035.pdf>)

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Institute (HEPI) indicates that demand for higher education is entering a period of uncertainty after many years of steady growth⁶.

Recent UCAS data shows a decline in applications in 2023 and 2024, reversing a long-term upward trend. This may signal greater hesitation among prospective students about entering higher education compared to previous cohorts. HEPI suggests that financial pressures and concerns about value for money are shaping decision-making. For university sport, this implies that future cohorts may be more selective and more sensitive to cost and perceived value, which could influence engagement with paid or optional sport provision.

Demographic projections also point to short-term growth followed by contraction. The number of 18-year-olds in the UK is expected to rise steadily until around 2030, with HEPI projecting an 8% increase in young entrants, equivalent to around 25,000 additional students. In the near term. This is likely to increase demand for facilities, timetabled activity, and entry-level or recreational sport opportunities. However, this growth is not expected to continue indefinitely. After 2030, the 18-year-old population is projected to decline, falling by around seven percent by 2035 and becoming 10% smaller than 2024 levels by 2040. This suggests a potential tightening of the student market in the medium term, with greater competition around recruitment, retention, and the quality of the student experience. In this context, sport and wellbeing provision may become a more visible differentiator between institutions.

HEPI also highlights uncertainty around future participation rates in higher education. It is not yet clear whether the recent dip in applications represents a temporary response to COVID-19 and cost-of-living pressures, or a longer-term shift in attitudes towards university. If participation rates stagnate, overall student numbers may track demographic change only, leading to flat or declining enrolments after 2030. Conversely, growth could continue if participation widens, particularly among men and students from disadvantaged backgrounds.

Financial context is another crucial factor shaping future cohorts. While tuition fees have fallen in real terms, living costs have risen sharply. HEPI identifies maintenance and living costs as increasing deterrents to participation. This is likely to influence how students prioritise their spending and their willingness to pay for optional services. In relation to sport and physical activity, incoming students may be more price-sensitive, placing greater value on low-cost, flexible, and wellbeing-focused opportunities rather than purely competitive sport.

Broader cultural narratives may also influence demand. HEPI notes a more critical public discourse around the value of university, including debates about graduate earnings and “value for money.” As a result, prospective students may adopt more instrumental attitudes towards higher education, focusing on outcomes and return on investment. In this climate, sport and physical activity may be valued not only for enjoyment, but also for their contributions to mental health, employability, and the overall student experience.

Taken together, these trends suggest that incoming cohorts may differ from existing students in several ways. They are likely to be more financially constrained, more value-driven in their choices, and more focused on wellbeing and balance. For university sport providers, including

⁶ Bekhradnia, B. (2024). *Student Demand to 2035*. Higher Education Policy Institute (HEPI Report 179).

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BUCS, this reinforces the importance of inclusive, low-cost, flexible, and wellbeing-led sport and activity formats.

EXPECTED CHANGES IN THE HIGHER EDUCATION STUDENT POPULATION IN LONDON

Recent forecasting suggests that London is likely to remain a major centre of higher education growth over the next decade. The *Hyper-diversity revisited* report indicates that the number of London-domiciled students entering higher education is projected to rise substantially, with estimates of around 27,000 additional entrants per year by 2035⁷. This points to continued expansion within London institutions and suggests that demand pressures in the capital may differ from patterns seen elsewhere in the UK.

The report also highlights that London's future student population is expected to become increasingly diverse. Earlier projections suggest that no single ethnic group may form a majority among entrants, with growing representation from a wide range of ethnic and cultural backgrounds. This reinforces the idea that London's higher education sector will serve a particularly varied student population, with implications for how services and student experiences are designed, including sport and physical activity provision.

At the same time, the report cautions that growth does not necessarily translate to equal access. There are indications that socio-economic gaps in participation could widen by 2035, particularly for students from lower-income backgrounds. This suggests that while overall numbers may increase, inequalities in who benefits from higher education could persist or grow, underlining the need for accessible and inclusive opportunities beyond the classroom.

When considered alongside national forecasts, London's outlook appears somewhat distinct. HEPI projections already indicate that demographic change may reduce the number of 18-year-olds nationally after 2030. The London forecasts broadly support HEPI's view that future demand is uneven, with some areas experiencing growth while others may see stagnation or decline. This suggests that institutional planning, including sport and wellbeing provision, may need to be responsive to regional variation rather than assuming uniform growth.

⁷ Boffey, R. and Raza, K. (2025). *Hyper-diversity revisited: London's student population in 2035*. AccessHE, London Higher.