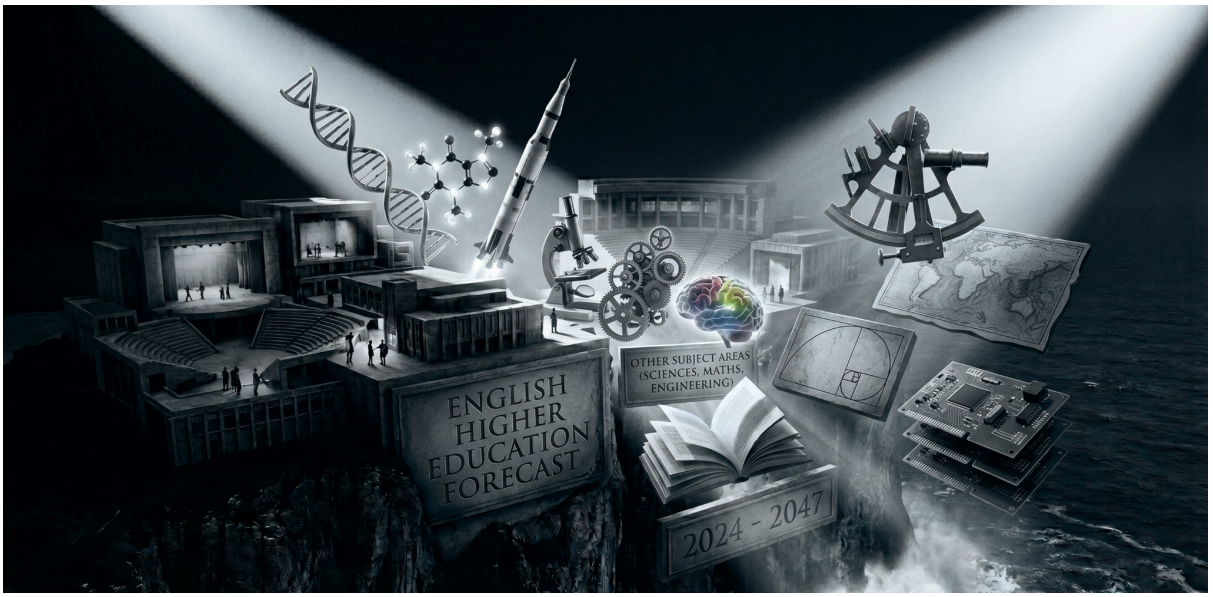
The Peak Is Not the Trend

England's Higher Education Demographic Demand Forecast, 2025 to 2047



By Blairgowrie HE Advisory: May 2026

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HE ADVISORY

Founder's Note

I have been a buyer of HE data intelligence services. I know what it costs, I know what arrives, and I know the gap between the two.

The products available to HE leaders have become technologically more advanced over the past decade. The datasets are larger, the visualisations are more sophisticated, and the presentation is more confident. What has not improved is the usefulness of the output for the people who must make decisions based on it.

Four things frustrated me consistently as a buyer.

The first was opacity. The model produces a number. The number is presented as authoritative. But the methodology is proprietary, the assumptions are undisclosed, and if a governor or investor asks how the projection was derived, the honest answer is that you cannot say. In a regulatory environment where boards are expected to understand and defend the evidence base for their strategic assumptions, that is not a minor inconvenience.

The second was authorship. Much of the demand intelligence available in the sector is produced by data professionals rather than HE professionals. The technical execution is often competent. The sector knowledge is not. An analyst who has not worked inside an English HE institution, navigated an APP submission, or sat in a planning committee does not understand what a planning director needs from a demand forecast. The result is technically correct output that does not connect to the decisions it is supposed to inform.

The third was the absence of action orientation. The products I encountered were descriptive. They showed what had happened and projected what might happen. They did not say what it meant, what the risks were, or what a planning team should do differently as a result. That work was left entirely to the buyer. What was sold as analysis was, in practice, data presentation with a commentary track. Professional punditry, not professional advice.

The fourth was the intellectual standard. Decisions about subject portfolio, capacity, and APP commitments are consequential and enduring. The analytical framework applied to those decisions should be held to a commensurate standard. What I encountered was work that was structured and confident but not subjected to the methodological scrutiny or evidential rigour warranted by the stakes. Assertions were made without sufficient grounding. Limitations were not disclosed. The model was treated as a black box whose outputs did not require justification. That is not good enough for decisions of this weight.

I built the Blairgowrie HE Forecast Model because I wanted a product I would have found genuinely useful as a buyer: institution-specific, methodology-transparent, authored by someone who understands the decisions it is meant to support, built and assessed to

doctoral standard, and written to reach a conclusion rather than to demonstrate that analysis had been performed.

This sector report applies that same approach to demographic demand across English higher education. The findings are set out plainly. The methodology is published in full. Where the data is uncertain, that uncertainty is stated explicitly.

The question the report cannot answer is the institution-specific one: where does your provision sit within this national picture, and what does it mean for your planning cycle? That is a different conversation, and one we are available to have.

Dr David O'Connor DBA (University of Bath, 2023)
Blairgowrie HE Advisory Limited

Executive Summary

First-degree, full-time, England-domicile enrolments across all 231 English HEIs reached 1,241,126 in 2025, up from 955,955 in 2014/15 (+29.4% over the decade). The Blairgowrie demographic demand forecast projects 1,246,226 by 2033: +0.4% against the 2025 base. The sector's demographic peak is forecast to be 1,306,654 in 2030, driven by larger school-leaver cohorts from the mid-2000s entering HE. By 2047, sector headcount is projected at 1,113,806, down 10.3% from 2025. The direction of long-run travel is not in doubt. The timing and rate of post-peak decline will be determined by planning decisions made now.

The aggregate trajectory conceals divergence at the subject level. Across the 21 CAH1 subject groups, 9 show growing national student preference and 10 are declining. Business and management, and subjects allied to medicine, show growing demand. Design, creative and performing arts, engineering and technology are in decline. Providers carrying high concentrations in nationally declining subject areas face a materially different planning position than the sector average implies. The aggregate is the context; the subject portfolio is the planning question.

This report establishes the sector baseline against which institutional planning should be calibrated. The methodology is published in full. Where the data is uncertain, that uncertainty is stated explicitly. This report does not answer the institution-specific question: how a named provider's catchment, subject mix, and peer comparator set interact with this national picture. That is a different conversation, and one Blairgowrie is available to have.

English Higher Education: The Sector in Context

First-degree, full-time provision is the core of English HE. With 1,241,126 England-domiciled enrolments in 2025, it is the highest-volume, highest-stakes part of the English HE system: the provision most directly exposed to demographic cycles, shifts in subject preferences, and the competitive dynamics of the school-leaver market. Most institutions depend on it for the majority of their income, their staffing model, and their estate utilisation.

The decade between 2014/15 and 2024/25 was one of recovery and growth. The 2010-2020 demographic trough, driven by smaller birth cohorts from the early 2000s, exerted sustained pressure on a sector that had not yet adjusted its capacity assumptions in response to the 2012 fee-reform expansion. The post-2020 recovery reflected larger mid-2000s birth cohorts beginning to enter HE.

That recovery is now the baseline. The question for the planning decade is what comes next: a managed transition through the 2030 demographic peak into a structurally lower landscape, or a reactive response to a contraction of institutions that were not prepared for.

National Enrolment Trend 2014/15 to 2024/25

Sector FD FT England-domicile headcount grew from 955,955 in 2014/15 to 1,237,340 in 2024/25: +29.4% over the decade. The growth of this period was not uniform. The early years reflected a recovery in demand as applicant behaviour stabilised following the 2012 fee reform. The later years reflected the larger school-leaver cohorts of the mid-2000s entering the system. The fee-reform recovery is now complete, and the school-leaver cohort entering HE is smaller than that of the preceding cohort.

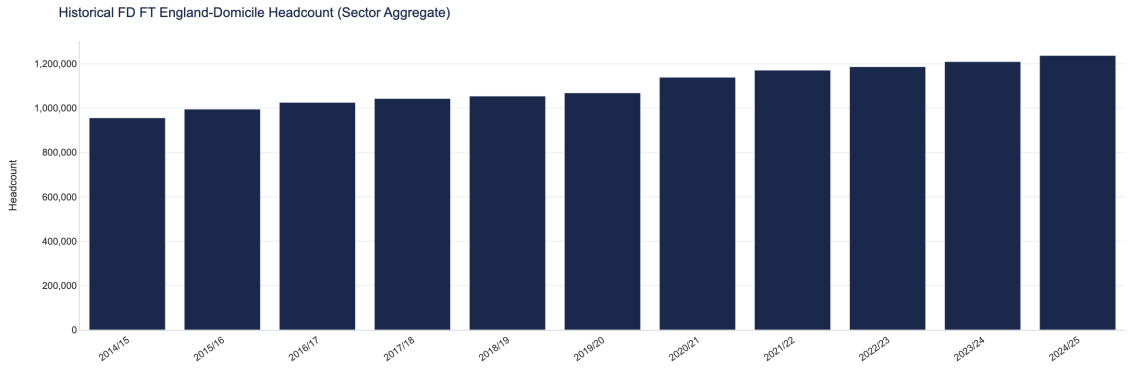


Figure 1: FD FT England-domicile headcount, sector aggregate, 2014/15 to 2024/25. Source: HESA Student Record.

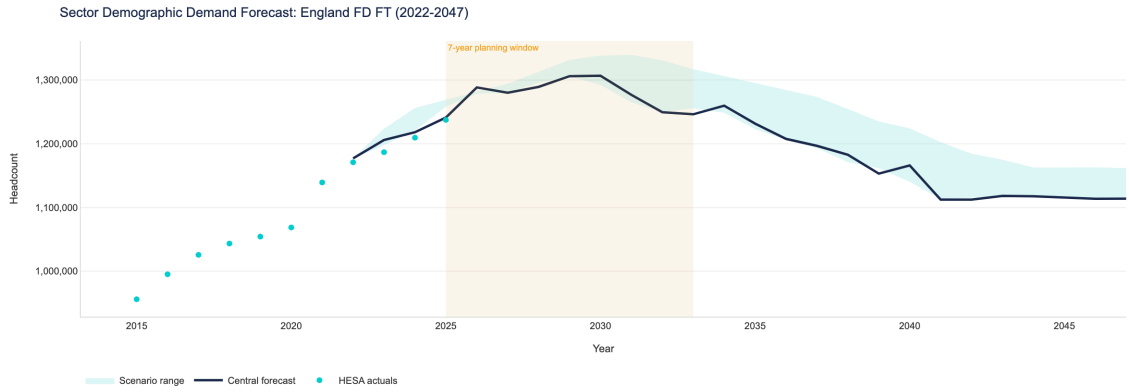
The decade trend is structural, not cyclical. The pressures building in the post-2025 period are demographic in origin; they reflect birth rates recorded 18 years ago, not policy decisions that can be reversed. Providers whose planning assumptions treat the 2014 to 2024 growth trend as a baseline for the next decade are working from the wrong starting point.

The Forecast Outlook: 2025 to 2047

The central estimate: 1,246,226 FD FT England-domicile enrolments by 2033, +0.4% against the 2025 base of 1,241,126. The demographic peak is forecast at 1,306,654 in 2030. By 2047, the sector returns to 1,113,806: -10.3% against 2025.

The 7-year primary planning window of 2025 to 2033 shows near-term demographic support from the school-leaver population peak. This support does not reverse structural trends; it moderates the pace of absolute decline in the early years of the window. The peak is a planning window, not a recovery. Institutions that treat 2030 as validation of their current capacity model risk being overexposed when the post-peak contraction arrives.

The long-run outlook to 2047 reflects post-2008 birth rates feeding through the system. The cohort sizes are fixed. The projected 10.3% decline from 2025 to 2047 is comparable in



depth to the 2010-2020 trough. The difference is that the 2010-2020 trough was followed by a recovery. The post-2030 contraction ends at a structurally lower baseline than it began.

The scenario band at 2033 spans 1,255,585 to 1,317,005: a spread of 4.9 per cent around the central estimate. A narrow band means the demographic direction is not in question; only the magnitude. The band reflects uncertainty about the age window for participation, not about the ONS projection itself.

Subject Portfolio: Divergent Trajectories

The sector aggregate conceals material variation at the subject level. Across the 21 CAH1 subject groups, 9 show growing national student preference and 10 are declining. These divergent trajectories are not visible in aggregate headcount data. A provider carrying a heavy concentration in declining disciplines faces a materially worse planning position than the sector average implies.

Subject areas with growing national preference: Business and management (19.6% of sector, -0.4% to 2033); Subjects allied to medicine (12.1% of sector, +0.7% to 2033); Social sciences (10.1% of sector, +0.4% to 2033).

Subject areas with declining national preference: Design, and creative and performing arts (8.1% of sector, +0.5% to 2033); Engineering and technology (6.3% of sector, +0.6% to 2033); Biological and sport sciences (4.8% of sector, +1.1% to 2033). Providers with high concentrations in these areas face compound pressure: declining student preference amplifies the demographic headwind rather than offsetting it.

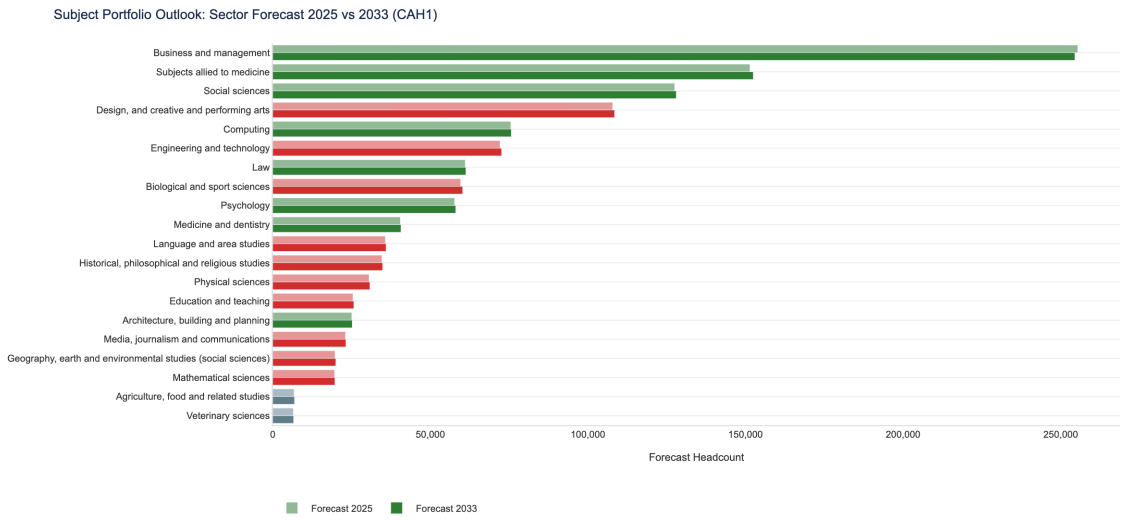


Figure 3: Sector subject portfolio forecast 2025 vs 2033 by CAH1 group. Colour indicates national student preference trend (green = growing, red = declining, grey = stable). Source: HESA, Blairgowrie subject forecast model.

As demonstrated in Table 1, business and management are the anomaly. At 19.6 per cent of sector FD FT headcount, it is the largest single subject group in English higher education and the only one in this table with a negative demographic trajectory: 255,439 in 2025 to 254,525 by 2033, a loss of 914 places. No other subject in the top ten moves backwards. For a sector where the aggregate forecast shows near-flat growth of +0.4 per cent, this is not a minor note. A provider carrying Business and management at 30, 40, or 50 per cent of its portfolio is exposed to a demographic headwind that the sector average actively conceals.

The remaining nine subject groups all show positive demographic movement, but the range is narrow: from Biological and sport sciences at +1.1 per cent to Computing at +0.2 per cent.

That is a spread of less than one percentage point across nine subject groups representing roughly 60 per cent of sector volume. This is not a story of diverging demographic fortunes within the subject portfolio. It is a story of one outlier and nine subjects moving in close formation around the sector average.

The two largest subject groups after Business and Management both show upward trends. Subjects allied to medicine, at 12.1 per cent of sector volume, grow +0.7 per cent to 152,458 by 2033. Social sciences, at 10.1 per cent, grow +0.4 per cent, exactly in line with the sector average. Together, these two areas account for 22 per cent of all FD FT enrolments and provide a stable demographic platform for providers concentrated in them.

The forecast holds the subject-level market share constant. It cannot distinguish whether the -0.4 per cent demographic pressure in Business and management is amplifying or offsetting a separate shift in student preference for the subject. For providers with high Business and management concentration, the demographic baseline here is the floor: if preference trends are also negative, the planning position is materially worse than the sector aggregate implies.

Subject area	Sector share	Forecast 2025	Forecast 2033	Change 25-33
Business and management	19.6%	255,439	254,525	-0.4%
Subjects allied to medicine	12.1%	151,405	152,458	+0.7%
Social sciences	10.1%	127,538	128,034	+0.4%
Design, and creative and performing arts	8.1%	107,863	108,454	+0.5%
Computing	6.6%	75,557	75,697	+0.2%
Engineering and technology	6.3%	72,132	72,599	+0.6%
Law	5.0%	61,069	61,281	+0.3%
Biological and sport sciences	4.8%	59,614	60,247	+1.1%
Psychology	4.5%	57,720	58,069	+0.6%
Medicine and dentistry	3.6%	40,510	40,695	+0.5%

Table 1: Subject Area Forecast to 2033

Where Demand Comes From: Geographic Distribution

The 30 local authority areas contributing most to sector FD FT headcount are mapped below. The bar colour reflects the ONS 18-year-old population growth trajectory for each area between 2025 and 2033. Of the top 30, 11 show growing 18-year-old populations through 2033 and 4 are in decline.

Geographic concentration is a structural risk multiplier. A provider drawing a high share of its demand from a small number of local authority areas is exposed to the specific demographic trajectory of those areas, not the sector average. At the sector level, geographic diversity is an inherent feature; at the institutional level, it is a planning variable.

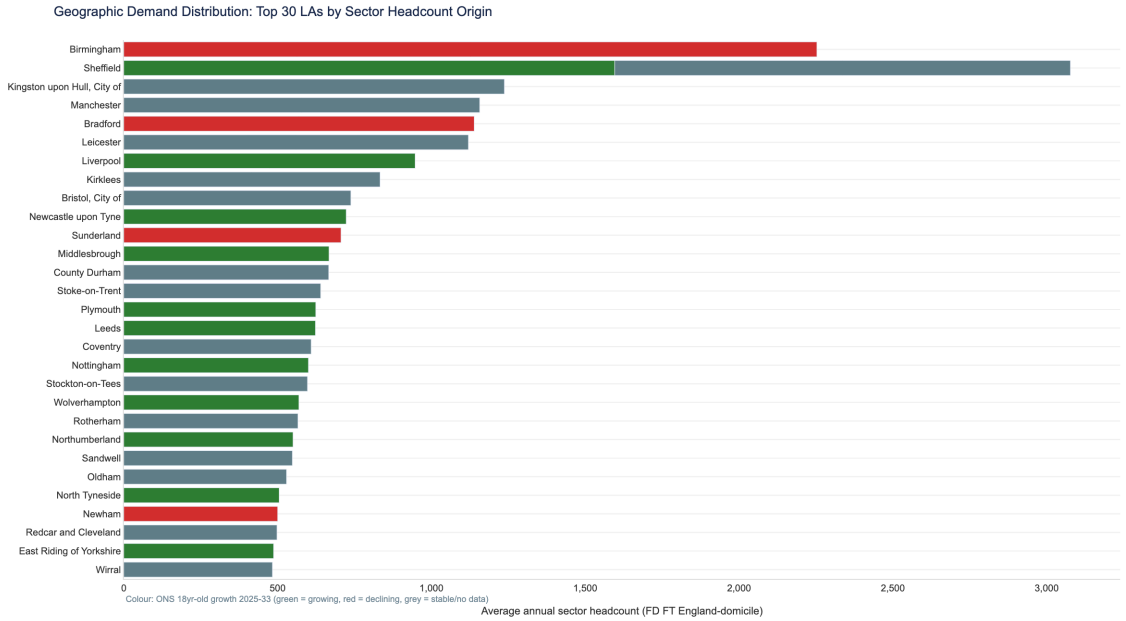


Figure 4: Top 30 local authority areas by sector FD FT headcount origin. Bar colour: ONS 18-year-old population growth 2025-2033 (green = growing, red = declining, grey = stable or no data). Source: HESA, ONS SNPP 2022-based.

The Supply Pipeline: A-Level Entries and Apprenticeship Starts

National A-level entries across state-funded schools and colleges have grown from 647,531 in 2020/21 to 692,333 in 2024/25 (+6.9%). A-level supply is the most direct leading indicator of HE demands from the school-leaver cohort. A growing pipeline supports HE demand over the near-term planning window.

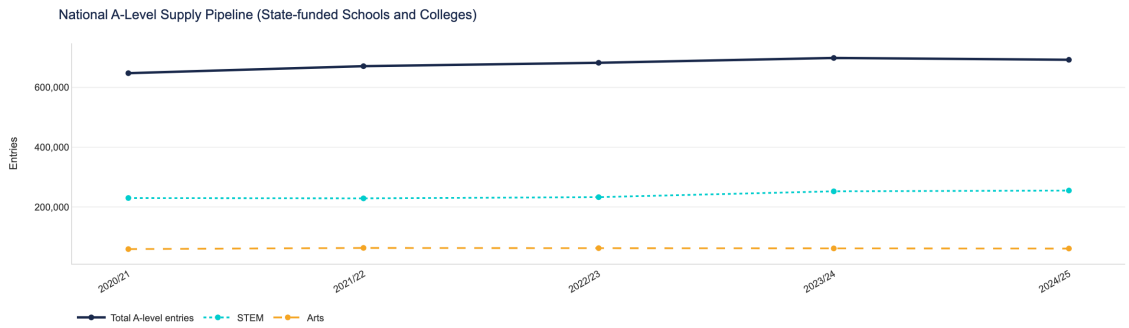


Figure 5: National A-level entries by total, STEM, and arts, 2020/21 to 2024/25. Source: JCQ, state-funded schools and colleges.

National Level 3-4, Under-24 apprenticeship starts reached 295,920 in 2024/25, up +14.7% from 258,100 in 2020/21. Over the same period, A-level entries grew by 6.9%, roughly twice as slow. The two supply routes are moving at very different speeds. Level 3-4 apprenticeships are the most direct structural substitute for HE entry in the school-leaver market. Unlike A-level supply, which feeds conversion models, apprenticeship growth operates on the same demographic cohort; it competes for the same 18-year-olds, before the HE entry decision is made.

The demographic baseline does not model this substitution effect. The forecast shows how many young people will be in the system; it does not show how many will choose HE over an employer-sponsored alternative. For providers with significant vocational or professional programmes, or for any institution in a region where apprenticeship take-up is high, the actual conversion rate from demographic pool to enrolled headcount may be lower than the baseline implies. Name it explicitly in the strategic plan.

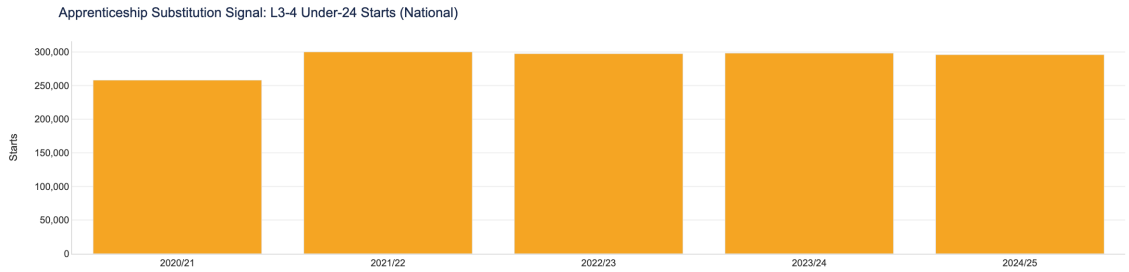


Figure 6: National Level 3-4, Under-24 apprenticeship starts, 2020/21 to 2024/25. Source: DfE Apprenticeships and Traineeships

Planning Implications

The demographic peak is a planning window, not a target

The sector is forecast to reach 1,306,654 in 2030. That figure should not be treated as a steady-state assumption for estate, staffing, or curriculum investment. It is a temporary condition resulting from a single large birth cohort moving through the system. Capacity decisions made at the demographic peak carry the highest risk of reversion in the planning cycle.

The long-run contraction is structural, not cyclical

The projected 10.3% decline from 2025 to 2047 reflects post-2008 birth rates, not a policy decision that can be reversed. Providers whose strategic plans do not include a post-2030 demand scenario are working from an incomplete risk picture. The long-run outlook belongs on the board risk register, not in the monitoring section of the planning committee papers.

The aggregate trend understates portfolio-specific risk

Subject areas, including Design and creative and performing arts, show both declining national student preference and adverse demographic trajectories through 2033. A provider with high concentration in these areas faces compound pressure that the sector average does not capture. Sub-discipline analysis is a standard component of any thorough institutional demand review; applying the sector headline to a specific subject portfolio will produce the wrong answer.

The A-level supply pipeline is growing

National A-level entries have grown +6.9% over the period. This is a near-term positive signal that reinforces the demographic upward trend to 2030. It does not offset the post-peak structural decline; it extends the window for portfolio and capacity adjustment before the contraction arrives.

Apprenticeship growth is the unmodelled headwind in the demographic baseline

National L3-4, Under-24 apprenticeship starts reached 295,920 in 2024/25, up +14.7% from 258,100 in 2020/21. A-level entries grew by 6.9% over the same period, roughly twice as slow. The two supply routes for the school-leaver cohort are not moving together. This is not a contextual signal.

The demographic forecast models how many 18-year-olds will be in the system; it does not model how many choose an employer-sponsored route over a higher-education route. For providers with vocational, professional, or technical programmes, or for those in regions with high apprenticeship employer density, the gap between the demographic forecast and actual enrolled headcount may widen independently of population trends. Boards reviewing

enrolment assumptions should treat the apprenticeship growth rate as a variable in that gap, not as a footnote to the demographic story.

Geographic concentration amplifies institutional risk

The near-term geographic demand picture is favourable: 11 of the top 30 demand-generating local authority areas show growing 18-year-old populations through 2033, against 4 in decline. This near-term signal does not carry through to the post-2033 period.

The governance question is now live

As demand assumptions diverge from strategic plan baselines, boards and audit committees will ask questions about the evidence base for enrolment projections. Providers who can answer those questions with a published, defensible methodology are in a structurally stronger position than those who cannot. The Blairgowrie methodology is published in full in the methodology note.

What Does This Mean for Your Institution?

This report describes the sector. It does not describe your institution.

Whether the national trend is material to your planning position depends on factors this analysis cannot reach: your specific subject mix within each CAH1 group, your catchment profile, your current strategic plan enrolment assumptions, your APP commitments, and the weight of individual subject areas in your overall financial model.

Blairgowrie can produce this analysis at the institutional level, with or without a named peer comparator set. The institutional report shows how your catchment compares with the sector demographic baseline, how your subject portfolio compares with the national trend directions set out here, and where you stand against your direct peers. Both options are delivered as a Word report.

Briefing calls are available by arrangement. To commission: intelligence@blairgowriehe.com

Methodology Note

Scope: This analysis covers only English higher education institutions. Providers in Wales, Scotland, and Northern Ireland are excluded due to the absence of equivalently granulated published demographic projection data for those jurisdictions. This is a data availability constraint, not a methodological one.

What the model is

The Blairgowrie HE Sector Demand Forecast is a demographic baseline applied at a national scale. It answers one question: given the demographic composition of English HE's historical student population and the projected change in the 18-year-old population across all English recruiting local authority areas, what is the plausible range of FD FT England-domicile headcount from 2022 to 2047? The model does not forecast changes in market share, yield rates, fee policy, or any other non-demographic factor. Its value is precisely this restriction: it separates the structural from the strategic.

The forecast formula

The sector-level forecast aggregates 231 provider-level demographic baseline models. For each provider: forecast (provider, year) = SUM over LAs of [LA_share x historical_headcount x (ONS_18_LA_year / ONS_18_LA_2022)]. The sector forecast is the sum of these 231 provider-level outputs. Because LA share and participation rate cancel in the formula, it depends only on demographic growth factors, not on absolute local participation rates: it is a catchment-weighted demographic translator, not a participation model.

Scenario band

Only one ONS SNPP variant is available at the LA level: the 2022-based migration category variant. The scenario band is derived from age-cohort participation-window sensitivity: the lower bound applies the combined age 17-18 population growth factor; the upper bound applies the combined age 18-21 growth factor. The band reflects uncertainty about the age window for participation. It is not a formal confidence interval.

Data sources

HESA Student Record 2014/15 to 2024/25: all English HE providers, FD FT England-domicile headcount by local authority of student domicile. ONS 2022-based SNPP, migration category variant: 313 English LAs, single year of age, projected to 2047. JCQ A-level entries by LA 2020/21 to 2024/25 (state-funded schools and colleges): contextual supply signal, not integrated into the forecast formula. DfE Apprenticeship starts, Level 3-4, Under-24, 2020/21 to 2024/25: contextual substitution signal.

Known limitations

No market share adjustment: participation rates are held constant. England-domicile only: international student demand is not modelled and is subject to policy risks not captured in

the demographic model. Course closure and portfolio rationalisation are not modelled; rational institutional responses to declining demand would, in turn, accelerate aggregate decline. Only one ONS variant is available; the principal projection (zero net migration) would produce a deeper demographic trough in the late 2030s.

About the Author

David O'Connor spent 14 years in senior HE leadership, including serving as Pro-Vice-Chancellor, before moving into advisory work. The Blairgowrie demand forecast model was developed as part of doctoral research at the University of Bath and applied inside a real institution during that period: the methodology was built to answer a question he was already responsible for getting right.

That sequence matters. The model was not built by a data scientist studying the sector from outside. It was built by someone who had sat in the planning meetings, understood what the outputs needed to do, and constructed an analytical framework capable of doing it.

Dr David O'Connor DBA (University of Bath, 2023)

About Blairgowrie HE Advisory

The analysis in this report draws on public data. Regulators have published it. Universities have disclosed it in their audited accounts. Government bodies have released it in statutory collections. It is available to anyone who looks.

The problem is not access. It is that the data exists in separate places, published by separate bodies for separate purposes, and almost always read in isolation. A policy researcher reads the outcomes data. A bank analyst reads the financial tables. A journalist reads the admissions figures. Each sees a piece. The picture only exists when you read all of them at once, against the same institutions, in the same analytical framework.

Blairgowrie HE Intelligence builds and maintains longitudinal panel databases from public sources, which are updated as new data are released, covering student demand, financial performance, regulatory compliance, quality outcomes, staff and cost structures, and recruitment patterns. The infrastructure that produced this analysis runs continuously. This report is one of its outputs.

For institutions, we do the same work at the individual level.

A vice-chancellor briefing a governing body wants to know what the numbers mean for their specific financial position, their regulatory standing, and the realistic options available to them. A registrar facing a recruitment shortfall wants to know whether the market has moved or whether the institution has. A finance director stress-testing income projections wants to see the sensitivity analysis, not the headline figure. These are not questions a single dataset can answer.

We take data from multiple public sources, read it together against a single institution, and give executive teams analysis they can take into a board room and act on.

We work with universities across England on demand forecasting, financial and regulatory risk, access and participation performance, competitive positioning, and workforce cost analysis.

If this report has raised questions about your institution's position, we would be glad to talk.

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This report was produced by Blairgowrie HE Intelligence. Blairgowrie HE provides data-driven analysis and advisory services to the higher education sector. The analysis reflects only publicly available information. No information was obtained from any source under an obligation of confidence.

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