

All Eyes On: London

HELOA 2026

16 Jan 2026



HELOA

Agenda

- 1 Introduction**
- 2 Setting the stage**
- 3 Profiling London**
- 4 Shifting trends**
- 5 Takeaways**
- 6 Open discussion**

Who we are: IDP Education

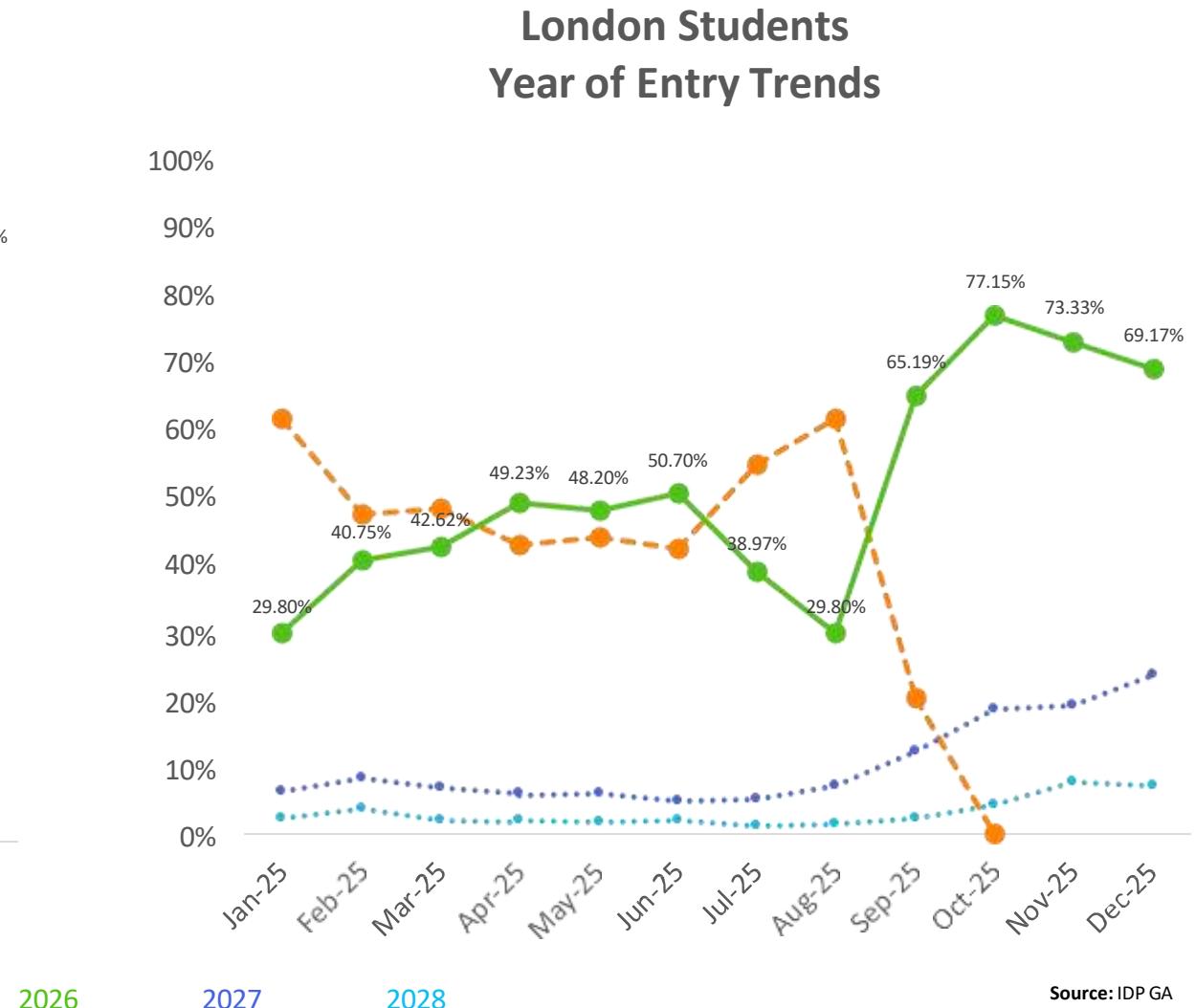
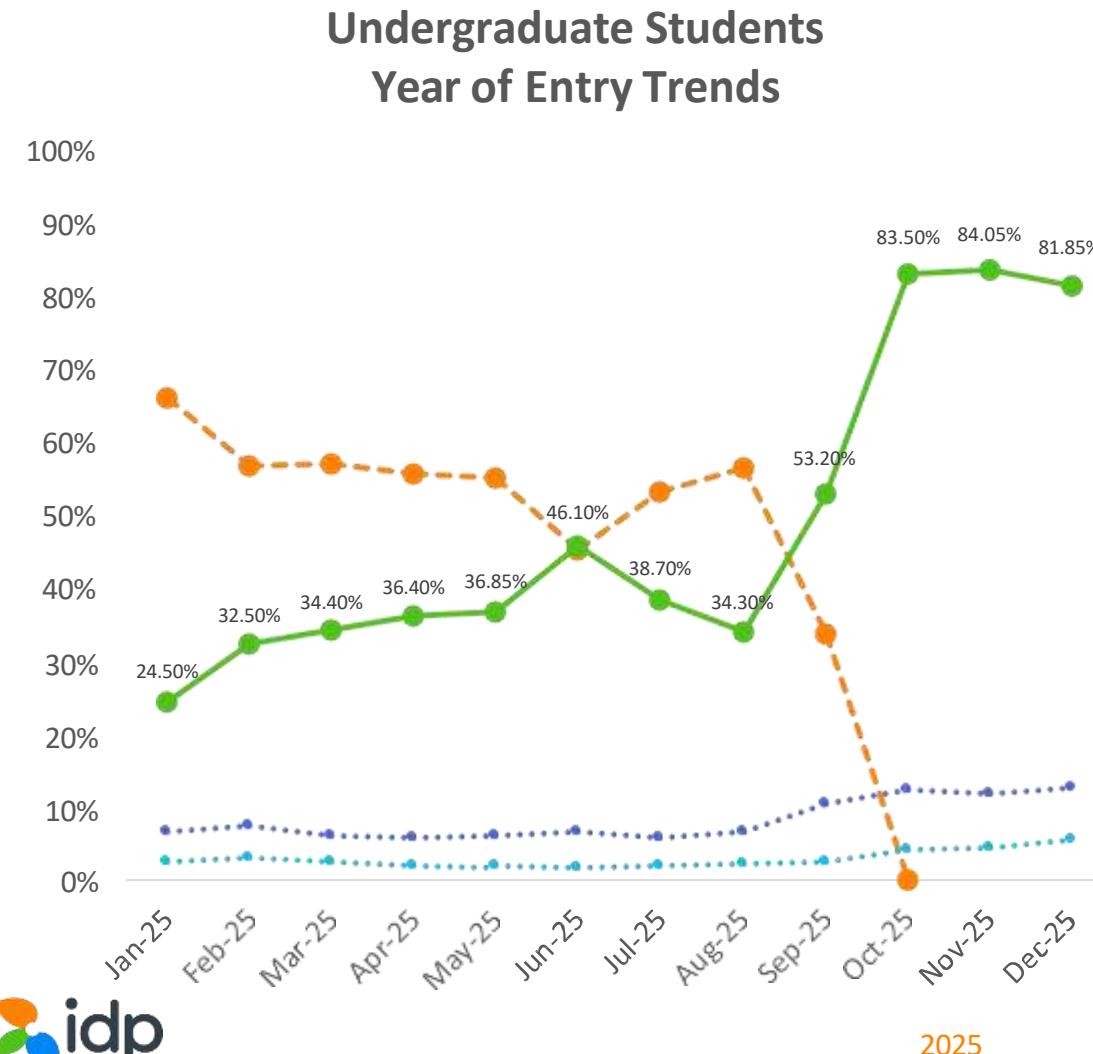
Shaping the future of higher education

We understand the unique challenges of our clients and sector partners. By working closely with their teams, we offer tailored data, consultancy, marketing, and in-country solutions to meet their specific needs.

Our global scale and expertise drive international recruitment solutions. Using advanced data analytics, we connect partners with the right students, supporting them throughout their journey to ensure successful outcomes.

Research from London broken down

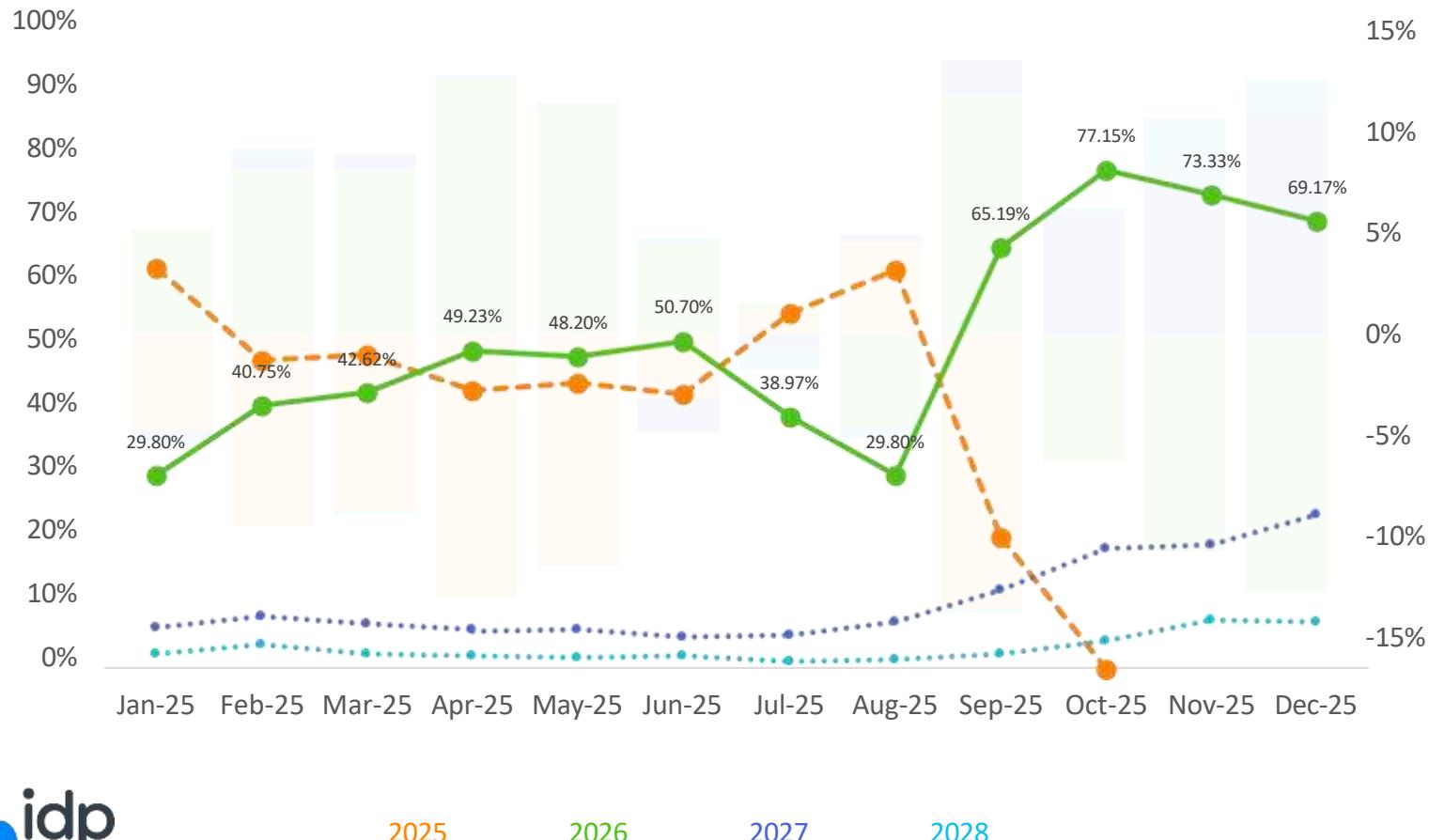
2026 research trends till date



Research from London broken down

2026 research trends till date

London Students Year of Entry Trends



Across almost every month pre-October, London shows a higher share of 2026 entry research than the national average. This is not simply earlier awareness, but faster progression through the consideration cycle, with London students moving on from an entry year sooner rather than lingering across multiple cycles.

September shows the largest single gap between London and national behaviour. Despite a stronger August Clearing presence, London students exit the cycle more decisively once outcomes finalise.

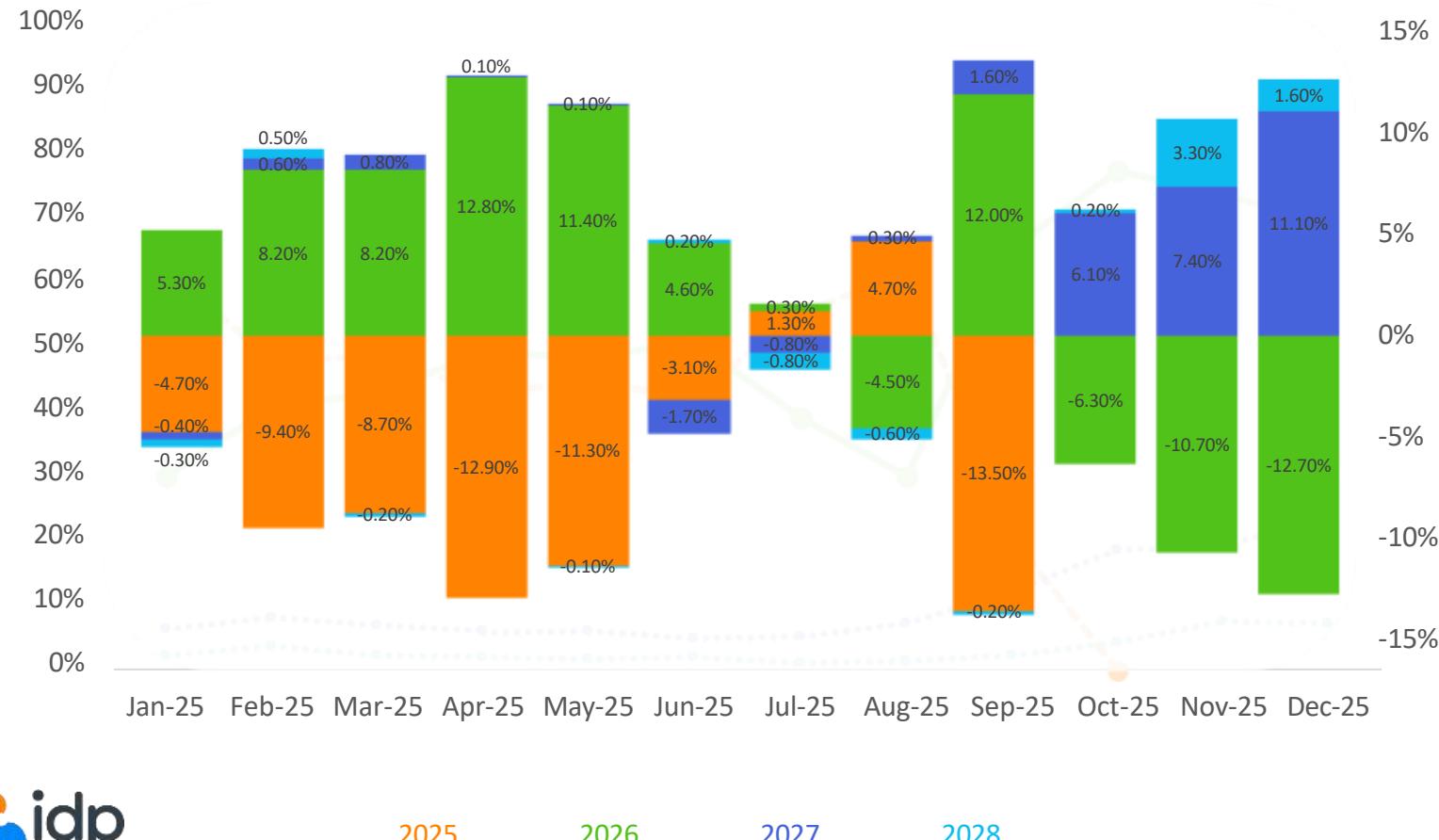
2025 research declines earlier and more steeply in London than nationally, as 2026 entry overtakes 2025 for multiple consecutive months well before Clearing. Nationally, this crossover is later and more tentative. This suggests London students' decision-making is more closely married to UCAS milestones, rather than hedging across cycles.

From October onwards, London has a higher share of users researching 2027 (and early 2028) entry compared with national trends, indicating that new, earlier-stage applicants enter the research market sooner in London, rather than applicants from the current cycle lingering longer.

Research from London broken down

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Greater London Calibre

Russell Group demand shifts

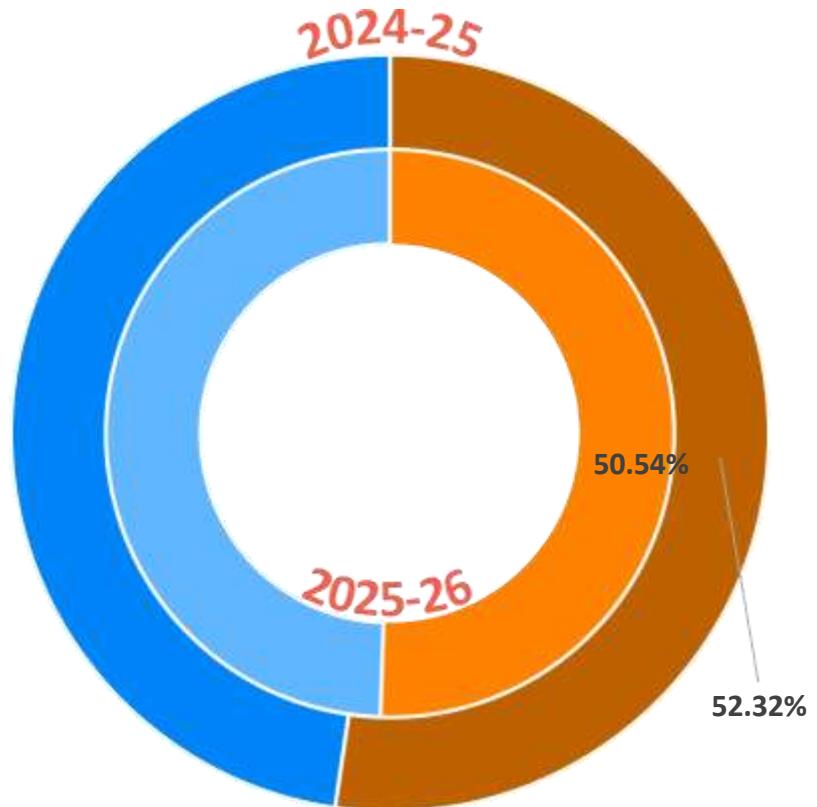
Russell Group institutions continue to attract around half of London-based demand, underlining their ongoing prominence within this market despite some softening year on year.

Compared with last year, Russell Group share has edged down slightly, suggesting a marginal broadening of interest with other institutions among London-based students.

After several consecutive cycles of Russell Group consolidation, this dip may signal the first signs of modest rebalancing in the London market, a positive indicator for non-RG institutions competing for attention.

The continued strength of Russell Group demand reflects how closely London-based students associate academic prestige with study choices, a dynamic that is particularly relevant in a region hosting the highest concentration of Russell Group institutions.

Russell Group
Rest of the Sector



Top destinations

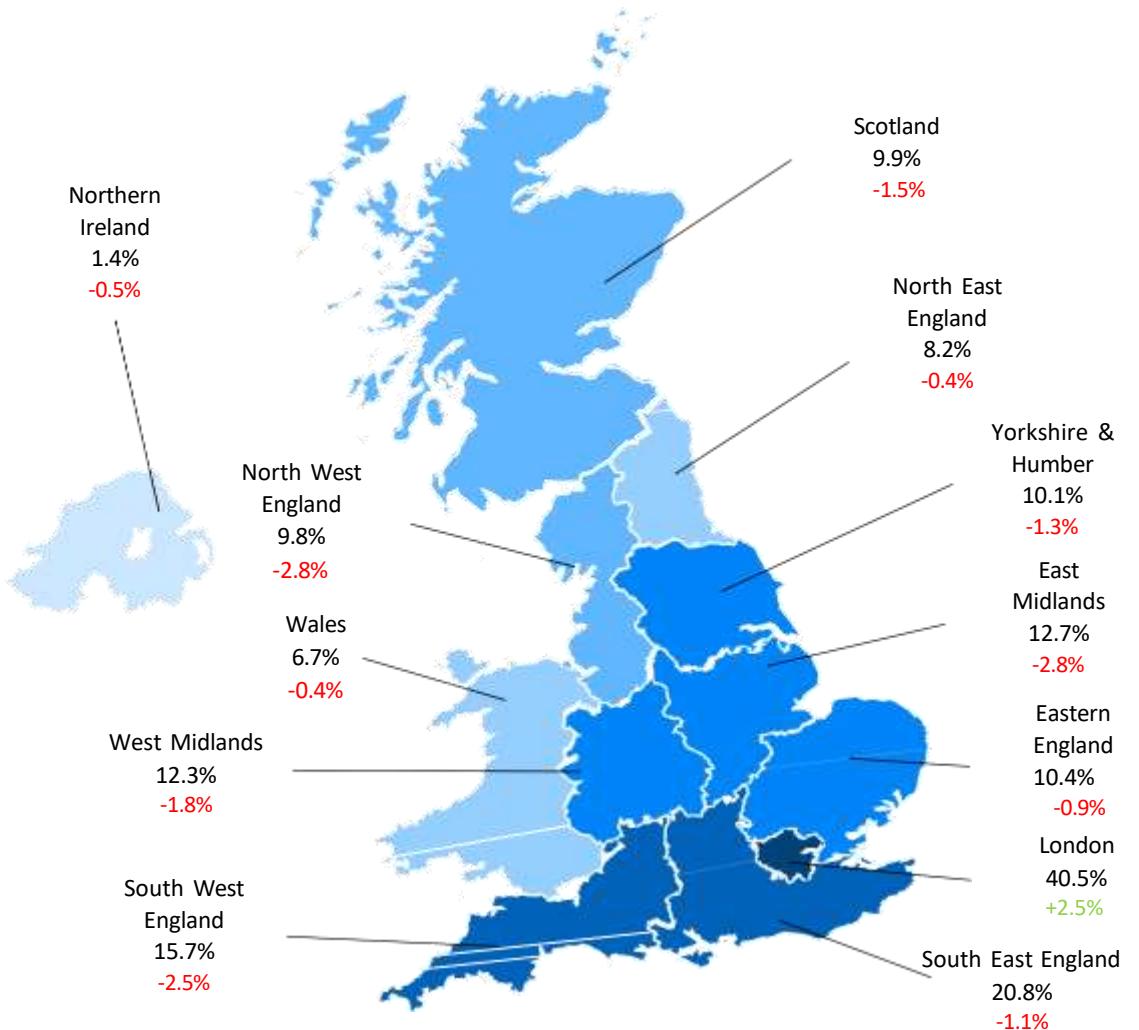
Where students from London are keen on studying

London is increasingly retaining its own students as a destination, reinforcing studying closer to home as a more practical and attractive choice for London-based applicants.

Outward demand from London is softening rather than redistributing, with fewer students looking beyond the capital rather than shifting interest between other regions.

Some regions are holding London demand more resiliently than others, with areas like the North East and Eastern England performing better than regions such as the East Midlands or North West.

Taken together, the pattern suggests London is becoming a more self-contained recruitment market, increasing the challenge for institutions outside the capital to attract London-based students.



Source: IQ Demand+

Top destinations

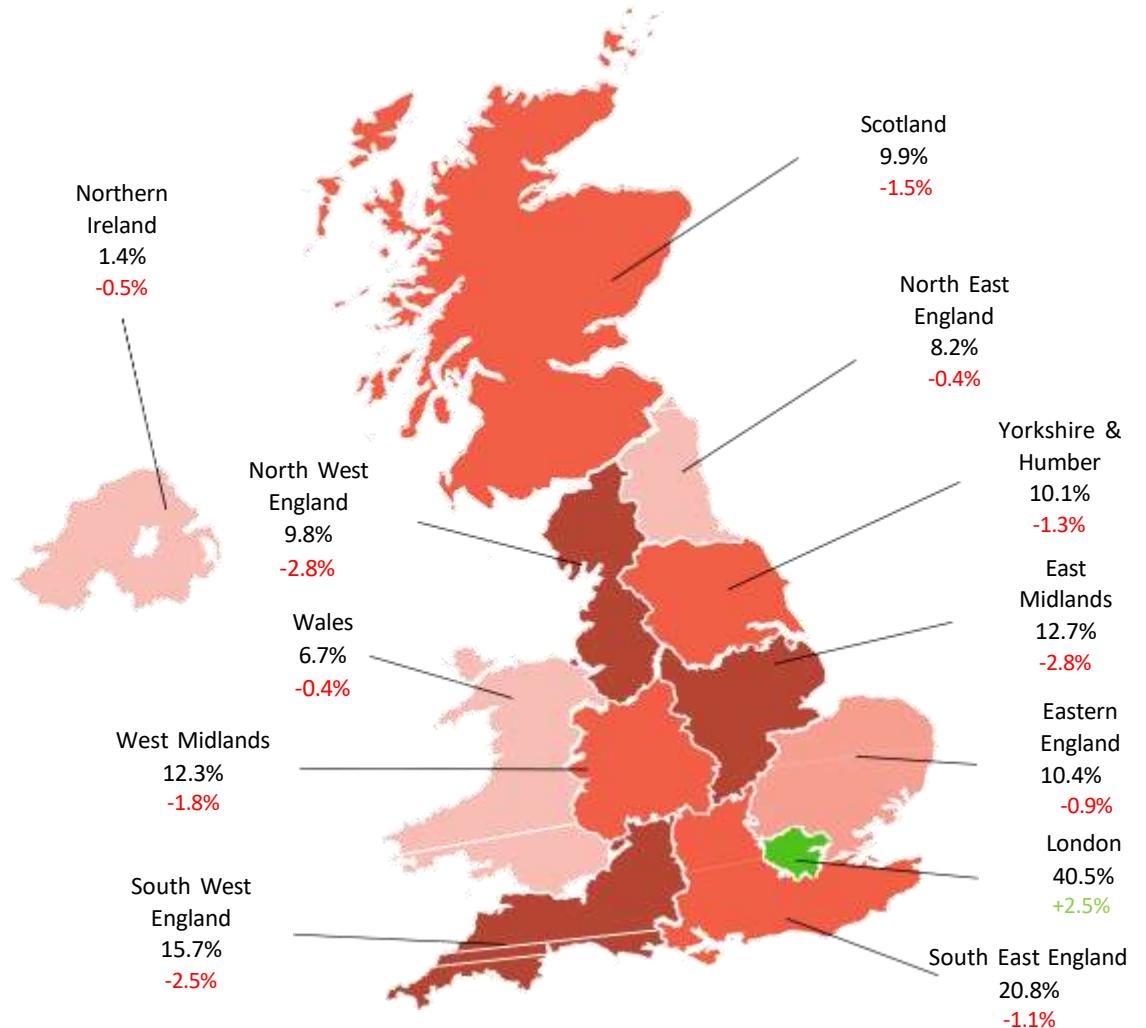
Where students from London are keen on studying

London is increasingly retaining its own students as a destination. The pattern suggests studying closer to home is becoming a more attractive and practical choice for London-based students, strengthening the local pipeline for London institutions while making outward recruitment more competitive.

Rather than demand shifting between other regions, fewer London-based students are looking beyond. This points to a reduction in geographic exploration, which may make London-origin applicants harder to reach.

Regions such as the North East and Eastern England appear to have held up more resiliently, compared with areas like the East Midlands or North West England. This suggests that certain regions may be better positioned to retain interest from London students due to clearer propositions, perceived value, or stronger differentiation.

Taken together, these trends suggest London is becoming more insular as a market, with more staying within the capital. This has clear implications for how institutions outside London position themselves to attract London-based applicants.



Source: IQ Demand+

Subject area demand

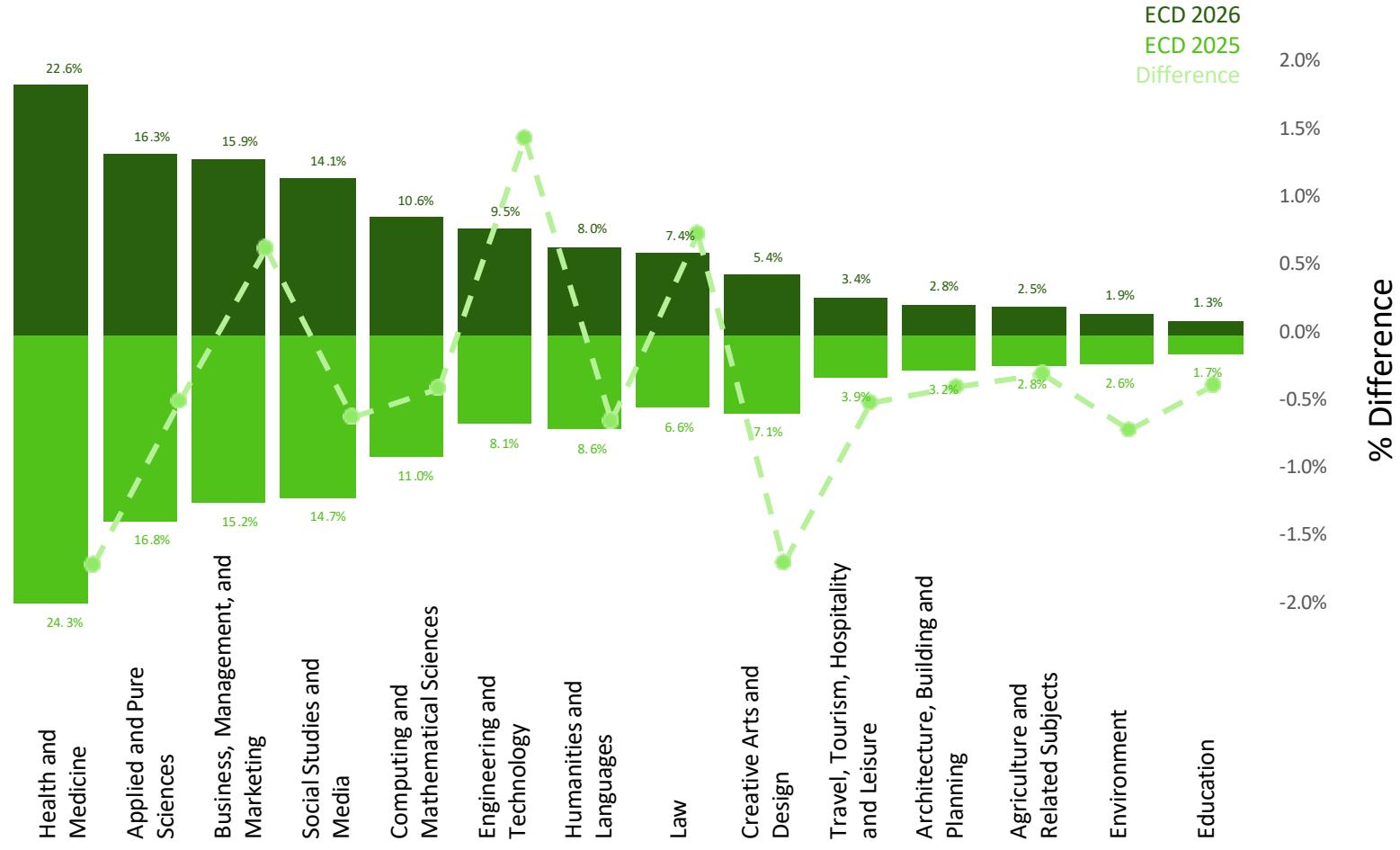
Year-on-Year breakdown of subject demand trends

STEM and STEM-adjacent subjects dominate London student demand, with courses like Health, Sciences, Computing, and Technology being quite strong as leaders.

Engineering, Law, and Business stand out as seeing growth in demand in 2026 versus the same time last year, indicating an inclination of London-based students prioritising subject areas with clear post-graduate opportunities.

Health and Creative Arts have seen the greatest dip in demand. In both cases, public perception fueled by media narrative might explain their continued decline.

Overall, subject demand among London-based students is becoming more outcomes-driven with growth concentrated in disciplines that offer clear progression, while traditionally popular subjects face greater scrutiny and competition.



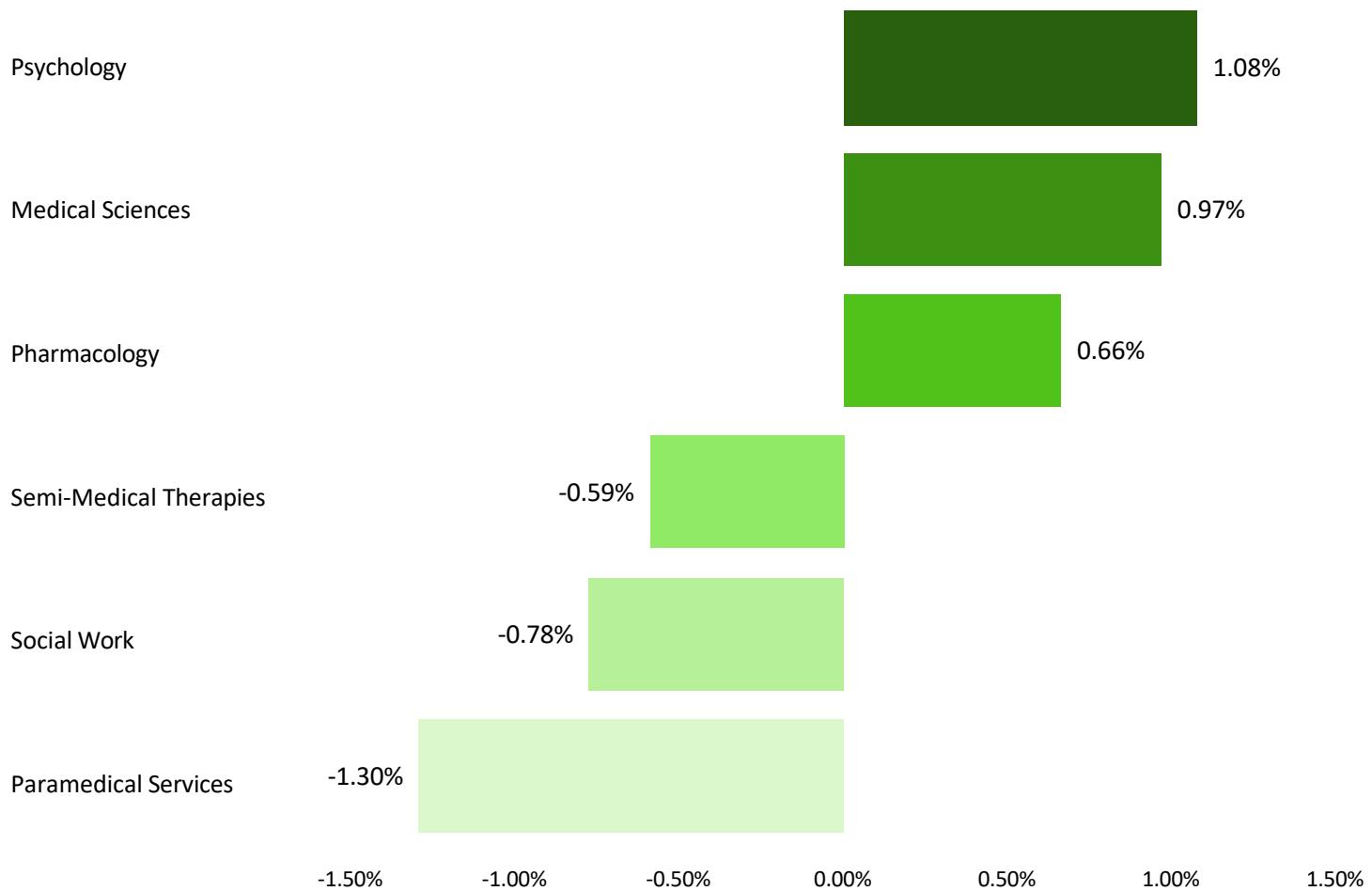
Sub-discipline shifts - Health

Top and bottom sub-disciplines shifts YoY for Health and Medicine

Within Health and Medicine, London's interest is consolidating around academically flexible routes, such as Psychology and Medical Sciences, which keep a wide range of postgraduate and professional options open and suggests applicants may be prioritising options at an earlier stage in their decision-making.

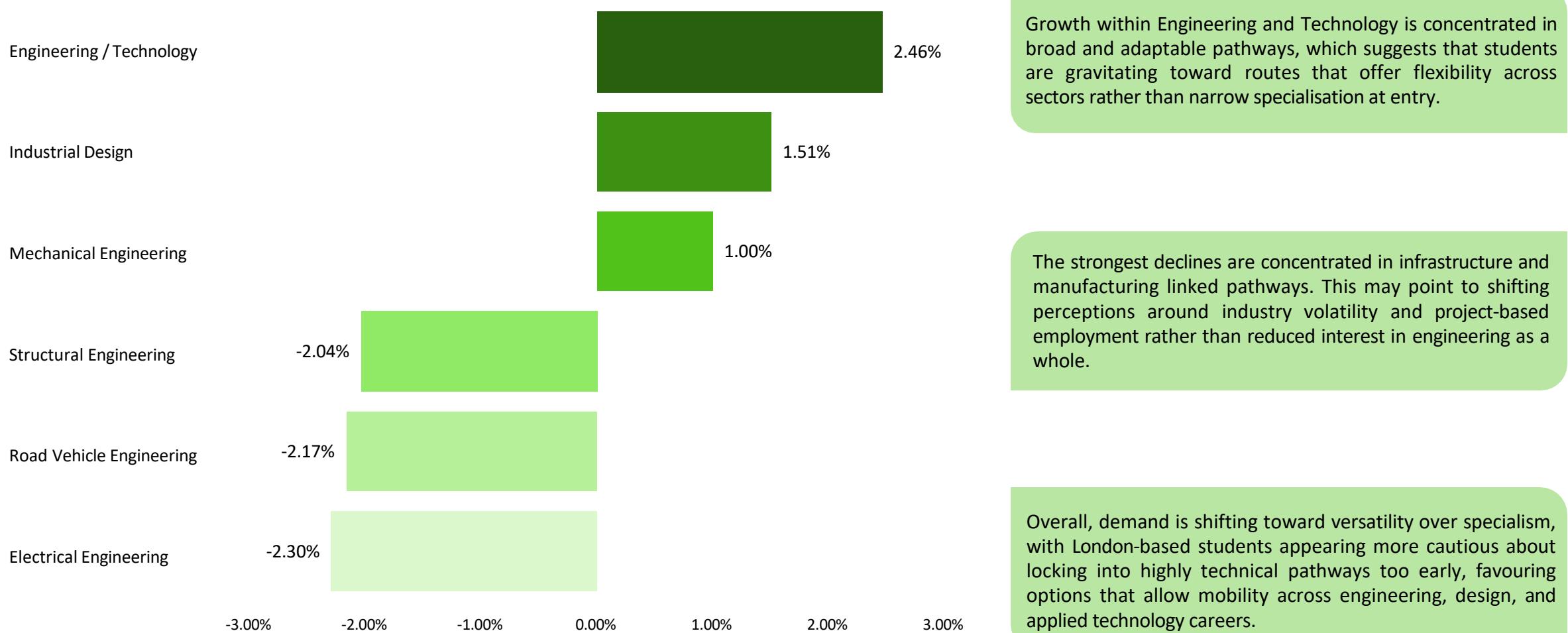
Declines are more pronounced in practice-led and frontline pathways, including Paramedical Services and Social Work. This reflects broader sector narratives around workload, placement intensity, and perceived sustainability, rather than reduced interest in health careers overall.

Taken together, the pattern points to increasing selectivity rather than disengagement, with students gravitating towards routes that balance career relevance with longer-term flexibility, raising important questions about workforce pipelines and access into applied health professions.



Sub-discipline shifts – Engineering

Top and bottom sub-disciplines shifts YoY for Engineering and Technology

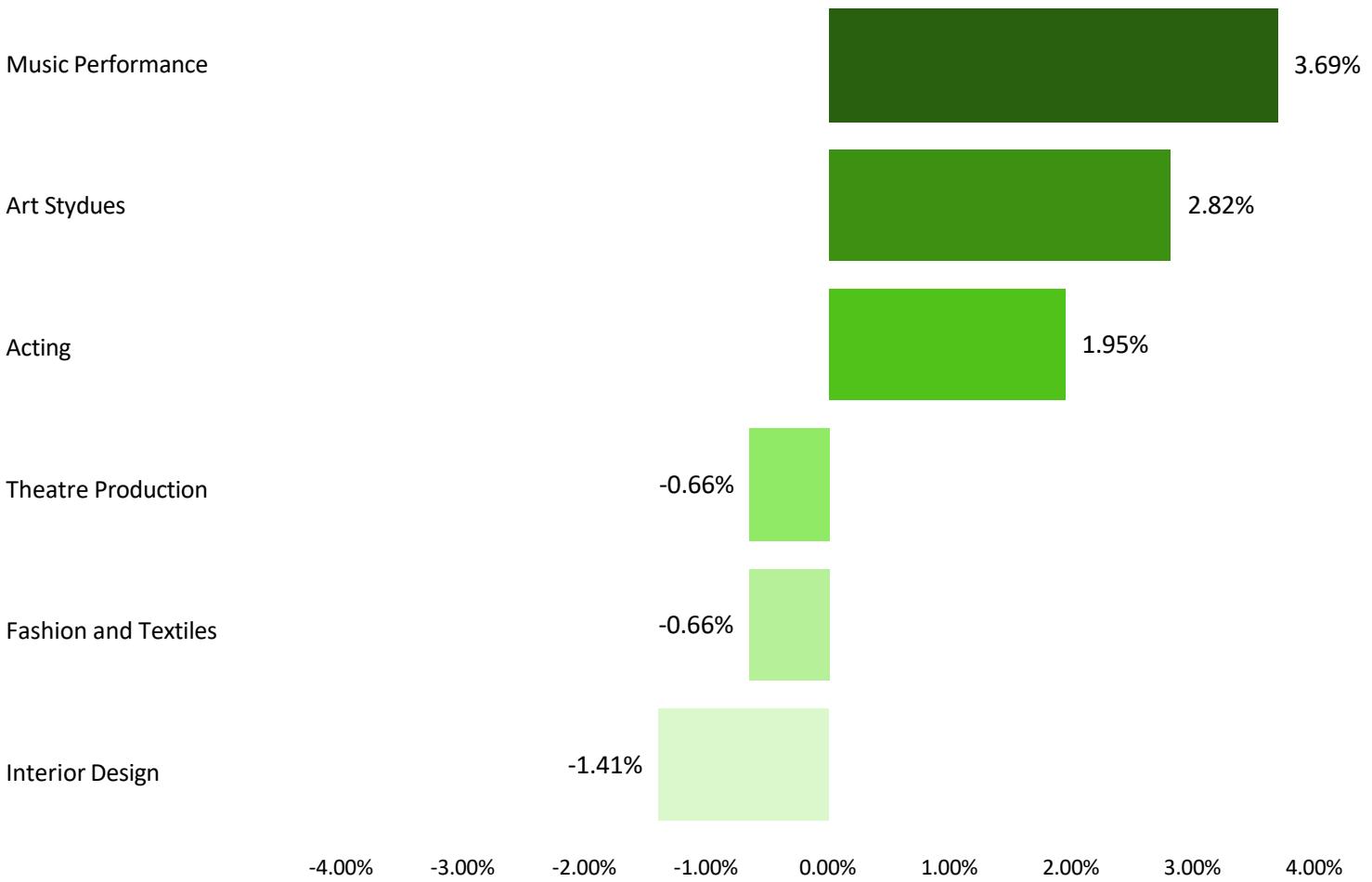


Sub-discipline shifts – Creative Arts

Top and bottom sub-disciplines shifts YoY for Creative Arts and Design

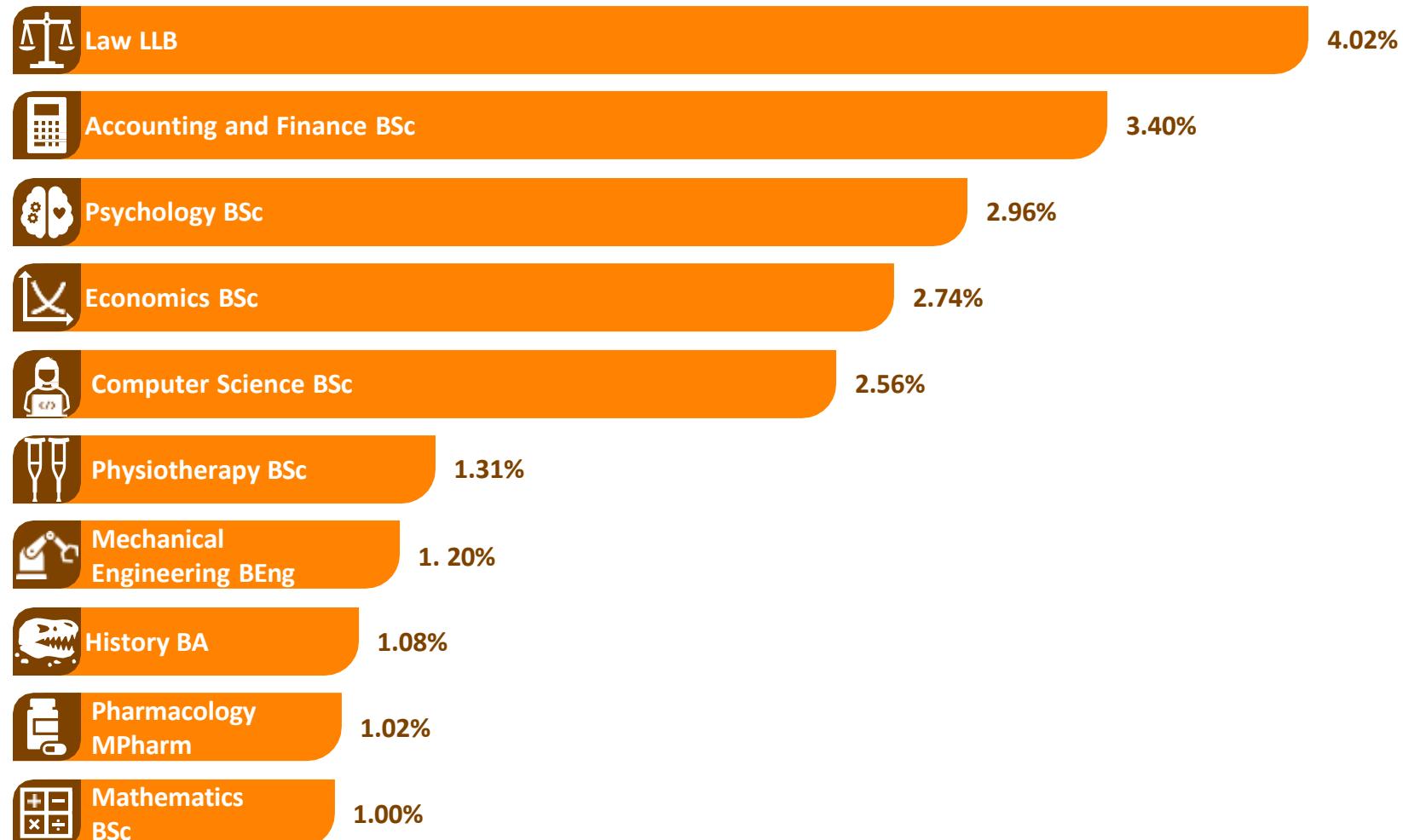
Performance-led disciplines are driving the growth that remains within Creative Arts, with Music Performance and Acting seeing the strongest uplift. This suggests students continue to be drawn to subjects with clear creative identity and visibility, particularly where London's cultural infrastructure feels directly relevant.

Design-oriented and applied creative pathways are seeing softer demand, and may reflect heightened aversion to cost, studio intensity, and perceived career risk in disciplines requiring significant upfront investment.



Course demand

Most in-demand courses by share of total interest



Top course demand from students spans a wide mix of disciplines, indicating broad academic interest rather than concentration in a single subject area.

STEM and STEM-adjacent pathways dominate the top-10, reinforcing the strength of technically oriented routes among London applicants.

The BSc is the prevailing qualification choice, appearing across the majority of top courses. In fact, History stands out as the sole BA in the top-10. This shows an inclination towards programmes perceived as analytical, skills-based.

London course demand reflects a pragmatic, outcomes-focused mindset, balancing subject variety with a clear preference for degrees that have clear pathways and flexibility across sectors.

Summary

Key takeaways

An industry defined by chaos

Major policy shifts across governments has created uncertainty within the sector.

London decides earlier and faster

Research behaviour shows accelerated decision-making across entry cycles.

Students are staying closer to home

But there is still opportunity for institutions outside the capital.

Subject demand reflects outcomes-driven choices

STEM grows as traditional areas face greater scrutiny

Flexibility is driving subject choices

Students favour flexible pathways over early specialisation.

Course demand reflects pragmatic choices

Variety exists, but employability drives top choices.

Looking ahead

Optionality and flexibility will shape applicant choice as support needs to align with earlier commitment.