THE ECONOMIC IMPACT OF THE UNIVERSITY OF KENT

Final Report

Viewforth Consulting Ltd, June 2024

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Executive Summary

This study was commissioned by the University of Kent. It was undertaken in May/June 2024 by Viewforth Consulting and is a 'snapshot' of the economic impact generated by the University in the academic and financial year 2022/23 (the latest year for which data were available.)

The study undertook modelled analysis of the expenditure of the University of Kent as well as the personal (non-fee) expenditure of University of Kent Students.

The study focusses on the impact of the University through its activity in and around its two campuses in Kent – in Canterbury and Chatham. The study included detailed modelled analysis of the distribution of university impact flowing out from the two campuses at Canterbury and Chatham (Medway), across Kent and the rest of the South East as well as the impact on the UK as a whole.

Key Results for impact on the local and regional economy

Impact on Canterbury

Output

- The University of Kent generated £370.5m (directly and through secondary or 'knock-on' effects) in Canterbury itself, with an additional £111.8m of output generated by the personal expenditure of students, making a total of £482.3m of output in Canterbury.

Employment

- The University directly provided 2997 jobs[1] in Canterbury and generated a further 1903[2] jobs in the city. Added to this are the 1429 jobs[3] in the City created by the personal expenditure of students to make a total of 6329 jobs in Canterbury dependent on the University's activities. This is equivalent to nearly 10% of Canterbury 2022 employment.[4]

GVA

- The University generated £217.7m of GVA (directly and through secondary or 'knock-on' effects) in Canterbury itself, with an additional £52.7m of GVA generated in Canterbury businesses by the personal expenditure of students, making a total of £270.4m of GVA in Canterbury. This was equivalent to over 6.7% of Canterbury 2022 GVA.[5]

Impact on Medway Towns

Output

- The University of Kent generated £43.7m (directly and through secondary or 'knock-on' effects) across Medway area with an additional £16.1 m of output generated by the personal expenditure of students, making nearly £60m of output in the Medway Towns.

[1] Headcount jobs. The *equivalent University 'FTE' is 2606 FTE (based on HESA 2004) .Modelled analysis of secondary employment is also undertaken in FTE as an expression of labour demand. The results are converted to headcount jobs using the prevailing pattern across the South East Region of 1.47 headcount jobs for every 1* FTE.

[2] 1295 FTE

[3] 973 FTE

[4] Nomis 2024. Canterbury had 67,000 employee jobs.

[5] ONS 2024 Canterbury GVA for 2022 was £4009 million.

Employment

- The University generated 584 jobs[6] across the Medway Towns. Together with 207 jobs[7] in Medway created by the personal expenditure of students this made a total of 791 jobs[8] in Medway dependent on the University's activities. This was equivalent to 0.8% of Medway 2022 employment.[9]

GVA

- The University generated £25.4m of GVA (**directly** and through secondary or 'knock-on' effects) in Medway Towns, with an additional £7.6m of GVA generated in Medway businesses by the personal expenditure of students, making £33m of GVA in the Medway Towns. This was equivalent to nearly 0.5% of Medway 2022 GVA.[10]

Impact on Kent as a whole (including Canterbury and Medway Towns)

Output

- The University of Kent generated £465m (directly and through secondary or 'knock-on' effects) across Kent (including Canterbury and Medway Towns), with an additional £174m of output generated by the personal expenditure of students, making a total of £639m of output in Kent.

Employment

- The University generated 6248 jobs[11] across Kent (including in Canterbury and Medway Towns). Together with 2223 jobs[12] in the county created by the personal expenditure of students this made a total of 8471 jobs[13] in Kent dependent on the University's activities. This was equivalent to nearly 1.3% of Kent 2022 employment.[14]

GVA

- The University generated £268.3m of GVA (directly and through secondary or 'knock-on' effects) in Kent, with an additional £81.9m of GVA generated in Kent businesses by the personal expenditure of students, making £350.2m of GVA in Kent. This was equivalent to nearly 0.7% of Kent 2022 GVA.[15]

Total Impact on the South East Region of England

Output

- The University of Kent generated £608.1m (directly and through secondary or 'knock-on' effects) across the South East Region with an additional £303.6m of output generated by the personal expenditure of students, making a total of £911.7m of output in the South East.

Employment

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[6] 460 FTE
[7] 141 FTE
[8] 601 FTE
[9] Nomis 2024. Medway Towns had 96,000 employee jobs in 2022
[10] Kent County Council, Kent Analytics GVA in Kent Medway GVA in 2022 was £6715m
[11] 4880 FTE
[12] 1512 FTE
[13] 6392 FTE
[14] Nomis 2024 Kent had 637,000 employee jobs in 2022
[15] Kent County Council, Kent Analytics GVA in Kent Total GVA for Kent County Council and Medway together in 2022 was £50692m

- The University generated 8403 jobs[16] across the South East. Together with 3879 jobs[17] in the South East created by the personal expenditure of students this made a total of 12,282 jobs[18] in the South East dependent on the University's activities. This was equivalent to just over 0.24% of South East 2023 workforce jobs.[19]

GVA

- The University generated £339.1m of GVA (**directly** and through secondary or 'knock-on' effects) in the South East, with an additional £142.9m of GVA generated in South East businesses by the personal expenditure of students, making £482m of GVA in the South East. This was equivalent to 0.14 % of South East 2022 GVA.[20]

Total Impact on the UK[21]

Output

- The University of Kent generated £659.5m (directly and through secondary or 'knock-on' effects) across the UK with an additional £313.5m of output generated by the personal expenditure of students, making a total of £973m of output in the UK.

Employment

- The University generated 8996 jobs[22] across the UK. Together with 3978 jobs[23] in the UK created by the personal expenditure of this made a total of 12974 jobs[24] in the UK dependent on the University's activities.

GVA

- The University generated £362.8m of GVA (**directly** and through secondary or 'knock-on' effects) in the UK, with an additional £147m of GVA generated in UK businesses by the personal expenditure of students, making a total contribution to UK GDP of £509m.

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[16] 6346 FTE
[17] 2639 FTE
[18] 8984 FTE
[19] Nomis 2024
[20] Kent County Council, Kent Analytics GVA in Kent Total GVA for South East in 2022 was £336,218m.
[21] To take account of displacement issues, the impact of UK domestic students on the rest of the UK outside the South East is disregarded.
[22] 6755 FTE
[23] 2707 FTE
[24] 9462 FTE

Introduction

This report presents results of a study analysing the economic impact of the University of Kent in the academic and financial year 2022/2023. It was undertaken in May/June 2024 and is a 'snapshot' of the economic impact generated by the University in the academic and financial year 2022/23 (the latest year for which data were available.) This study updates previous analyses undertaken for the University of Kent in 2011, 2014 and 2018 . The study was undertaken by Viewforth Consulting.

The study involves modelled analysis of the expenditure of the University of Kent as well as the personal (non-fee) expenditure of University of Kent Students. It focusses on the impact of the University through its activity in and around its two campuses in Kent – in Canterbury and Chatham. This includes detailed modelled analysis of the distribution of university impact flowing out from the two campuses at Canterbury and Chatham (Medway), across Kent and the rest of the South East as well as the impact on the UK as a whole.

Results are presented for the impact of the University in terms of impact on output, employment and GVA at local, regional and UK level. The outcome multipliers for University expenditure (derived from the modelling process) are included in Appendix One.

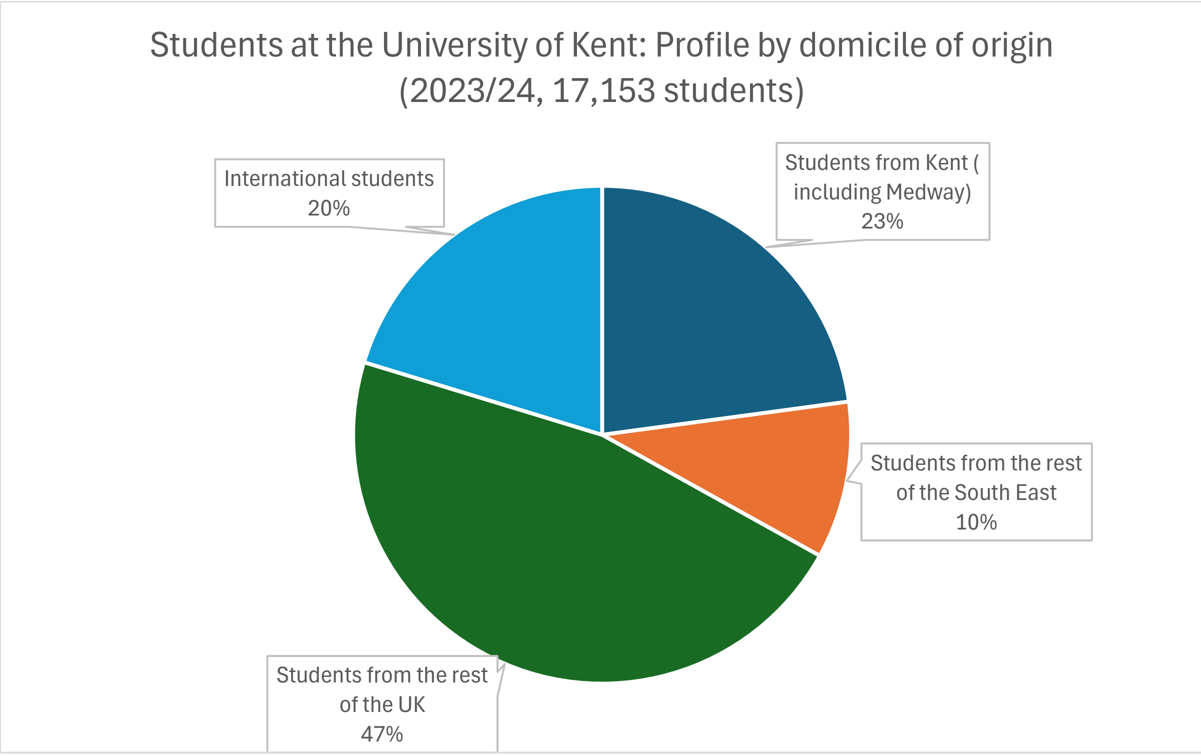
Additional results are included of the impact of student personal (non-fee) expenditure, disaggregated into impact of UK domestic students and international students in Section Two. A summary of the combined impact of the University and its students is presented in Section Three. Fully disaggregated tables of impact, including that made by different groups of domestic UK students, are included in Appendix Four. Estimates of the *Per Capita* impact of international students is included in Appendix Three.

About the University of Kent

The University of Kent was established in 1965, with a main Campus base in Canterbury, on the Southeast coast of England as well as an additional campus in Medway, as part of the *Universities at Medway* collaboration at Chatham. The University has a broad range of academic provision across six academic divisions: Arts and Humanities, Law, Society and Social Justice, Natural Sciences, Kent Business School, Human and Social Sciences, Computing, Engineering and Mathematical Sciences. It also works in partnership with Canterbury Christ Church University in the new Kent and Medway Medical School

In common with all UK higher education institutions, the University has faced a challenging operational environment in recent years, necessitating the review of several areas of its operations in order to ensure its longer-term development. However, as Figure 1 illustrates, the University continues to attract students from across the UK and internationally to study in Kent, as well as a significant proportion of its students coming from the more immediate local area. It has a turnover of over £271m, over 17000 students and employs around 3300 people. Through its activity as a large employer and purchaser of many local goods and services, as well as through the expenditure of its students, the University continues to be a vital player in the local and regional economy, generating jobs and output in Canterbury, Medway and across Kent as well as contributing to local and regional GVA.

Figure 1: Student profile



Source: University of Kent

As Figure One illustrates, the University has a diverse spread of students, 33% of whom come from the South East of England (23% from Kent , including Medway) , 47% attracted from other parts of the UK and 20% from overseas.

Section One: University (Institutional) impact

Institutional impact on local and regional output

Looking initially at the impact of **the University alone** (i.e. not including student expenditure), the majority of University impact (which includes direct and secondary impact) can be seen to be in Kent, with most of that concentrated in Canterbury. Table 1 shows the distribution of the overall impact of the University (£659.5m) and Figure 9 focusses on the distribution within the South East (£608m.)

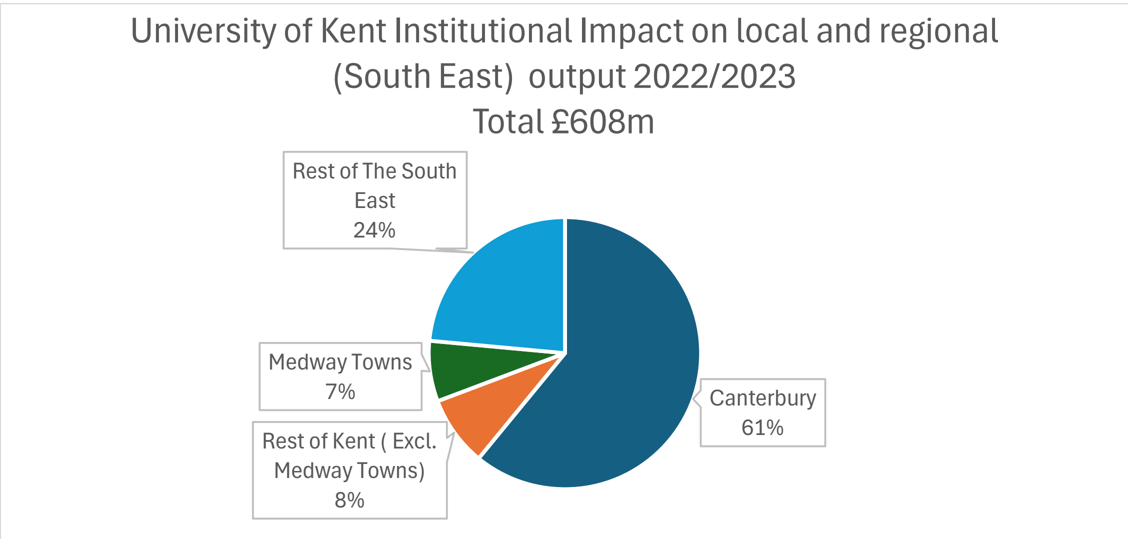
Table 1: University of Kent institutional impact on all UK output

	University Direct Output £m	Secondary output generated in other industries £m	Total Output Impact £m
Canterbury	244.2	126.3	370.5
Medway Towns	27.1	16.6	43.7
Rest of Kent	0.0	50.8	50.8
ALL Kent incl. Medway Towns	***271.3***	***193.7***	***465.0***
Rest of South East	0.0	143.1	143.1
ALL South East	***271.3***	***336.8***	***608.1***
Rest of UK	0.0	51.4	51.4
Total UK	***271.3***	***388.2***	***659.5***

Source: Viewforth Modelled Analysis 2024 Totals may not sum due to rounding

Figure 2 shows that 76% of regional (South East) impact was felt in the Kent area (61% in Canterbury, with 7% in Medway Towns and 8% in the rest of Kent), with 24% flowing to the rest of the South East.

Figure 2: University of Kent institutional impact on local and regional output



Source: Viewforth Modelled Analysis 2024

Institutional impact on local and regional employment

The picture is similar for employment generated (Table 2 and Figure 3), with the majority of employment generated (6248 jobs) being in Kent (including Canterbury and Medway Towns.)

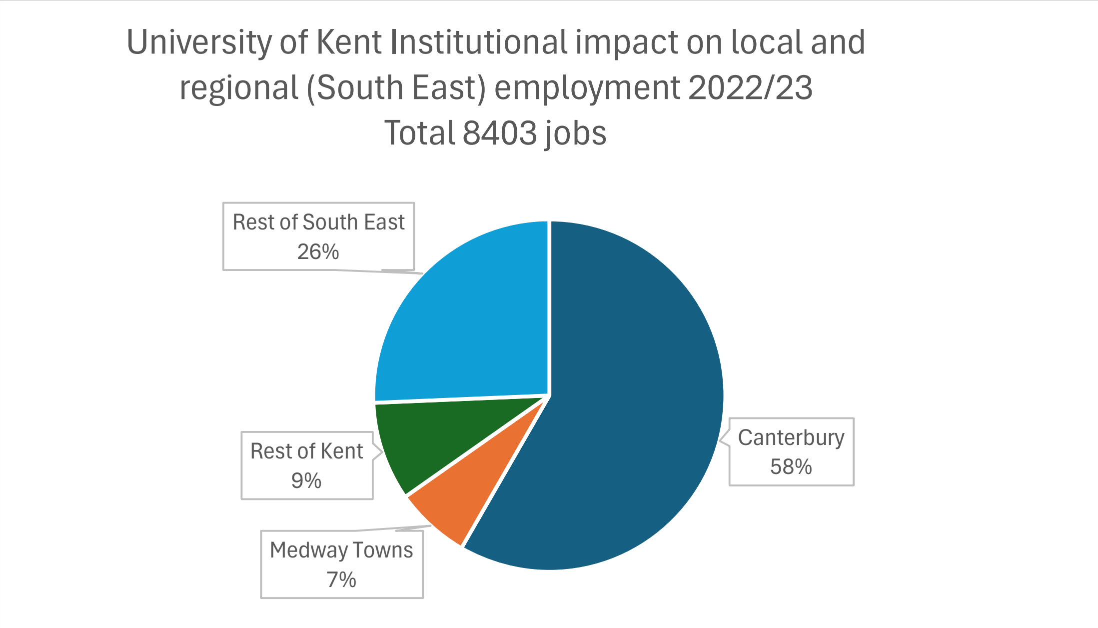
Table 2: University of Kent institutional impact on all UK employment

Table 2			
Headcount Jobs	University Employment	Jobs in other industries generated by University Spend	Total jobs
Canterbury	2997	1902	4899
Medway Towns[25]	333	251	584
Rest of Kent	0	765	765
ALL Kent incl Medway Towns	3330	2918	6248
Rest of South East	0	2155	2155
ALL South East	3330	5073	8403
Rest of UK	0	593	593
Total UK	3330	5666	8996

Source: Viewforth Modelled Analysis 2024 Totals may not sum due to rounding

Figure 3 shows the proportional regional distribution of employment, with 74% of all South East employment generated being in Kent (58% in Canterbury and 7% in Medway Towns with 9% in the rest of Kent) and the remaining 26% elsewhere in the South East.

Figure 3: University of Kent institutional impact on local and regional employment



Source: Viewforth Modelled Analysis 2024

[25] Direct University employment associated with the campus in Medway has been estimated based on an assumed 10% share of University activity taking place in Medway.

Institutional impact on local and regional GVA

Table 3 and Figure 4 shows the distribution of GVA[26], again showing the majority of GVA generated (which includes the University's own direct GVA) to be in Kent (including Medway).

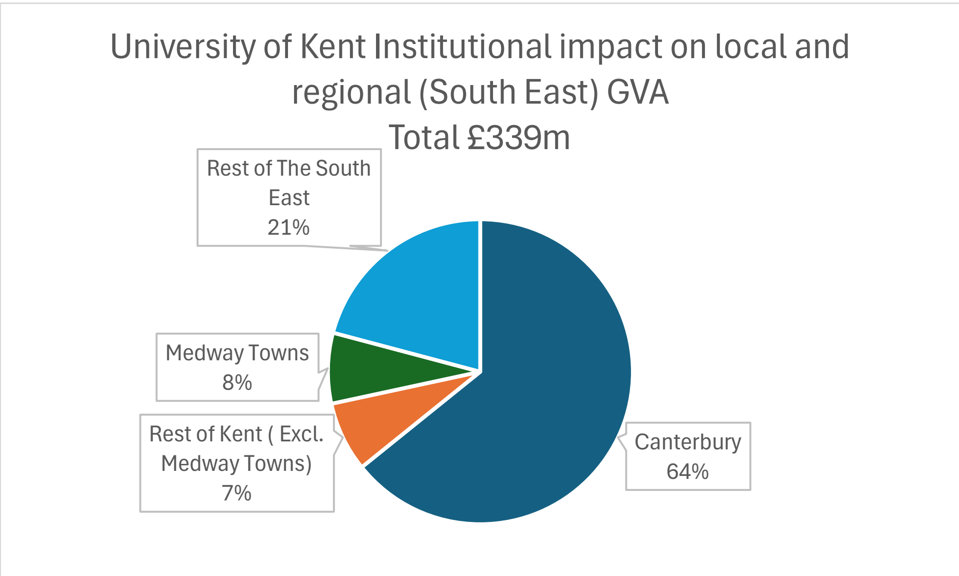
Table 3: All UK GVA impact of the University of Kent

GVA	Direct £m	Secondary £m	Total Impact £m
Canterbury	155.2	62.5	217.7
Medway Towns	17.2	8.2	25.5
Rest of Kent	0.0	25.1	25.1
ALL Kent incl Medway Towns	172.5	95.8	268.3
Rest of South East	0.0	70.8	70.8
ALL South East	172.5	166.6	339.1
Rest of UK	0.0	23.7	23.7
Total UK	172.5	190.3	362.8

Source: Viewforth Modelled Analysis 2024 Totals may not sum due to rounding

In Figure 4 the regional proportions are shown. The relatively larger share of GVA than output accruing to Canterbury (64% compared to 61% output)is because most of the University's direct GVA is attributed to its main base in Canterbury where the majority of staff are employed . As a particularly high skill organisation the University will tend to have a higher GVA relative to most of its suppliers . [27]

Figure 4: University of Kent Institutional impact on local and regional GVA



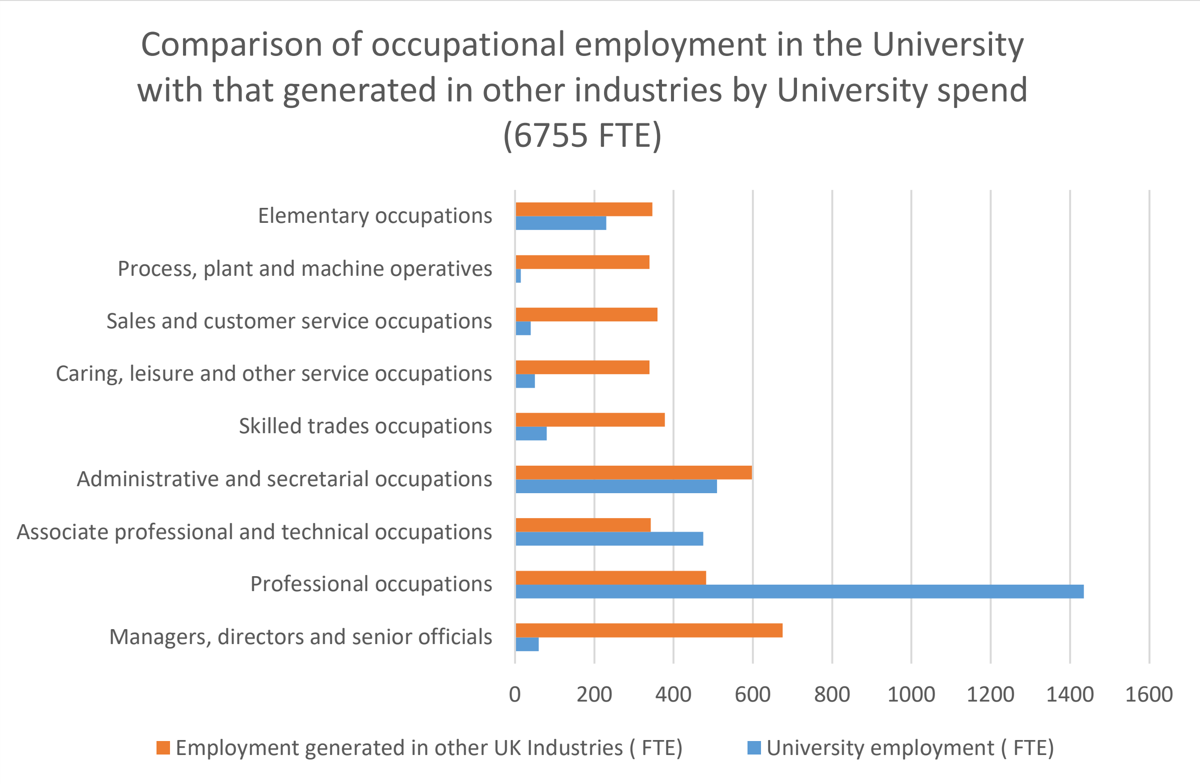
Source: Viewforth Modelled Analysis 2024

[26] GVA means Gross Value Added and is the regional measure of GDP (Gross Domestic Product.)

[27] Organisations that are both labour intensive and highly skilled tend to have a higher GVA to output ratio than those which are more capital intensive, or which need to buy in a significant proportion of materials to produce their outputs.

It is also interesting to observe the occupational profile of university employment and that of employment generated outside the University by the University's expenditure. This is presented in Figure 5 below.

Figure 5: Comparison of occupational employment in the University with that generated in other industries



Source: HESA 2024 and Viewforth Modelled Analysis 2024

From Figure 5, it is clear that the University of Kent is relatively specialised in Professional Occupations – which is to be expected given that all academic posts and a significant number of other posts (e.g. Librarians) are classified as Professional Occupations. However, it is also important to note that the University employs people across the full range of occupational classifications. There is an emphasis on more 'white collar' employment – e.g. Administrative and Secretarial Occupations, Associate Professional, etc, but also a relatively significant number of Elementary Occupations (230 FTE.) The University is in many ways like a small town, with staff needed to maintain all the campus environment, grounds, gardens, buildings, etc. This means that it is a source of many different types of employment.

University expenditure flowing through the economy creates employment that is more in keeping with the general pattern of employment across the country. The relatively low proportion of 'Managers, Directors and Senior Officials' in the University, compared to that generated more widely through its expenditure, is largely explained by the fact that many senior managers in the University will remain classed as Academic and in Professional Occupations, even if the particular role they occupy would tend to be classed as 'managerial ' if they were in a different industry.

Section Two: Impact of student personal expenditure

The fees that students pay to the University form part of the University income and expenditure flows and hence the impact of student fees paid is captured within the institutional impact that has already been presented.[28] However the personal (non-fee) expenditure of students is substantial and is of significant importance at a local level, with many local businesses dependent on the student trade. In total the personal (non-fee, off-campus) expenditure of students at the University of Kent in 2022 amounted to an estimated £221m. [29]

While at a UK level only international student expenditure is usually regarded as relevant (as only international student expenditure is additional to the UK as a whole), the impact of **all** student expenditure is of interest **at regional and local level**. In this study we assume that the impact of all student expenditure is important, on the basis that the money is either being attracted into the local economy from elsewhere or being *retained* in the Kent economy as students stay in their local area rather than go elsewhere.

Overall, student personal expenditure generated £304m of output, £143m of GVA and 3879 jobs in the South East region. Taking employment impact, 57 % of South East impact was in the Kent area (37% in Canterbury and 5 % in the Medway Towns area, 15% in the rest of Kent) and the remaining 43% elsewhere in the South East. The distribution of employment impact is shown in Table 4 and Figure 6.

Table 4. Impact of University of Kent Student Personal Expenditure on local and regional employment

	Jobs generated by International student off-campus expenditure (Headcount jobs)	Jobs generated by UK student off-campus expenditure (Headcount jobs)	Total Headcount jobs
Canterbury	330	1099	1429
Medway Towns	36	170	207
Rest of Kent	128	459	587
All Kent (including Canterbury & Medway Towns)	494	1729	2223
Rest of South East	359	1297	1656
ALL South East	853	3026	3879

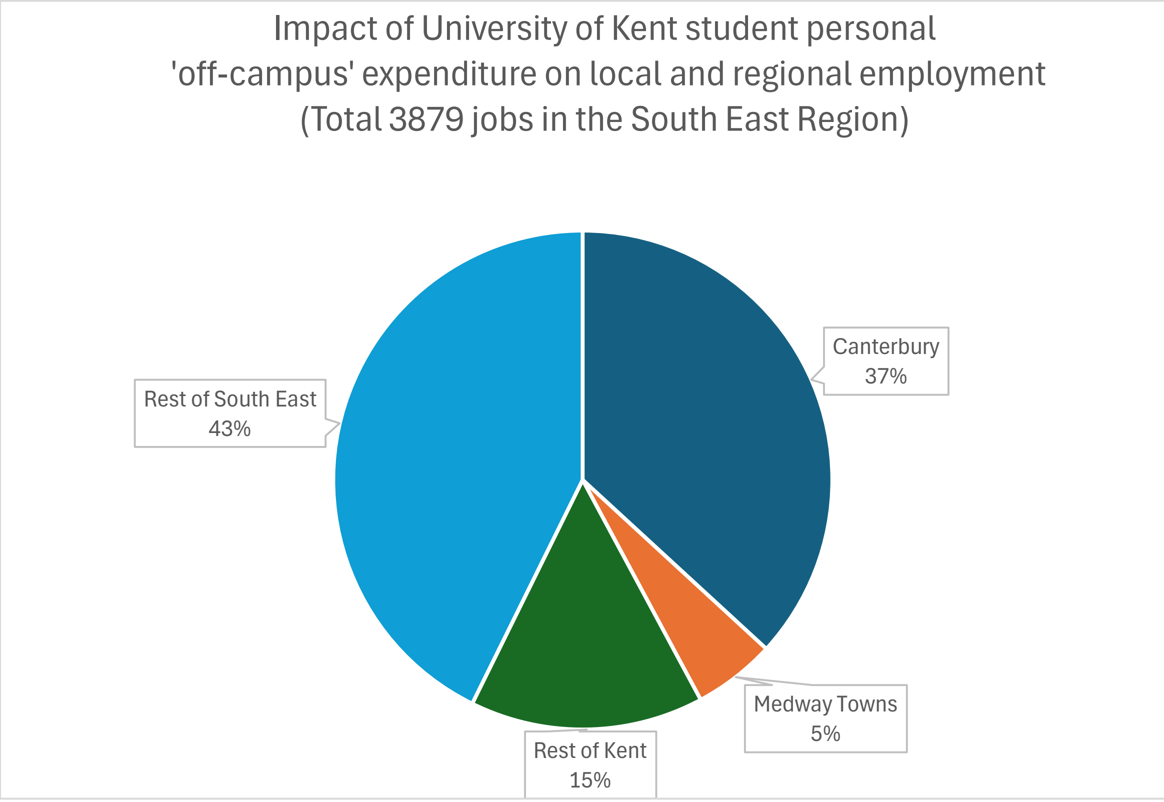
Source: Viewforth Modelled Analysis 2024 Totals may not sum due to rounding

[28] Account was also taken when preparing estimates of student expenditure that, in addition to Tuition Fees, students also pay other money to the University, for Residence and Catering and so on, and this money is captured in analysis of the University's impact. Therefore off-campus expenditure estimates are net of money paid to the University.

[29] Student Expenditure estimates are based on c17200 students studying at the University, drawing on 2023/24 data. There had been some difficulties in sourcing the 2022/23 data, not least because HESA publication of student data was extremely delayed for 2022/23. Hence overall estimates needed to be made considering both 2021/22 data and 2023/24 data. The split between international and domestic students, and the domicile of origin of domestic students (Kent/ South East/ Rest of UK etc) was assumed to be in a similar pattern to 2023/24 student data. In reality, the differences between these years will be small and these overall estimates will be very similar for each of these years. Estimates also drew on the most recent Student Income and Expenditure Survey for England (2023) and previous Government estimates for expenditure of international students, uprated by the CPI.

The distribution of employment impact from student expenditure is more dispersed across the South East than that of the University mainly because the University's impact includes its own employees, who are mostly based in Canterbury.

Figure 6: Impact of University of Kent Student personal expenditure on local and regional employment



Source: Viewforth Modelled Analysis 2024

Section Three: Summary of the combined impact of the University of Kent and its students

This section presents summary tables of the local and regional impact of the University of Kent together with the impact of student personal expenditure. This gives the most comprehensive picture of the importance of the University of Kent to the South East economy. Fuller discussion and additional charts will be contained within the final report.

Tables 5,6,7 and 8 present the overall impact on the South East Region and the UK (Direct and Secondary)[30] in terms of output, employment and GVA with details of impact accruing to Canterbury, the Medway Towns, the rest of Kent, and the rest of the South East.

[30] 'Direct' output, employment and GVA is that of the University itself. Secondary output, employment and GVA is that generated in other businesses outside the university by the expenditure of the university and its staff.

Table 5 Output impact of the University and its students

Output £m	University's own Direct Output £m[31]	Secondary Output Impact of University Spend £m	Impact of International Student 'Off-Campus' Spend £m	Impact of UK Student 'Off-Campus ' Spend £m	Total Output Impact £m
Canterbury	244.2	126.3	25.8	86.0	482.3
Medway Towns	27.1	16.6	2.8	13.3	60.0
Rest of Kent	0.0	50.8	10.0	35.9	96.7
All Kent incl Medway Towns	271.3	193.7	38.7	135.3	639.0
Rest of South East	0.0	143.1	28.1	101.5	272.7
All South East	271.3	336.8	66.8	236.8	911.7
Rest of Uk	0.0	51.4	9.9	N/A[32]	61.3
All UK	271.3	388.2	76.7	236.8	972.9

Source: Viewforth Modelled Analysis 2024 Totals may not sum due to rounding

Table 6 GVA[33] impact of the University and its students

Gross Value Added (GVA)	University's own Direct GVA £m[34]	Secondary GVA Impact of University Spend £m	Impact of International Student 'Off-Campus' Spend £m	Impact of UK Student 'Off-Campus ' Spend £m	Total GVA Impact £m
Canterbury	155.2	62.5	12.2	40.5	270.4
Medway Towns	17.2	8.2	1.3	6.3	33.1
Rest of Kent	0.0	25.1	4.7	16.9	46.7
All Kent incl Medway Towns	172.5	95.8	18.2	63.7	350.2
Rest of South East	0.0	70.8	13.2	47.8	131.8
All South East	172.5	166.6	31.4	111.5	482.0
Rest of Uk	0.0	23.7	4.1	N/A[35]	27.8
All UK	172.5	190.3	35.5	111.5	509.8

Source: Viewforth Modelled Analysis 2024 Totals may not sum due to rounding

[31] The University's total direct output in 2022/23 was £271.3m. This was allocated 90% to Canterbury and 10% to Medway towns to reflect the (updated) estimated split of University activity between the two Campuses, based on the student numbers allocated to each campus.

[32] UK Domestic student expenditure impact is only included at regional level to take account of 'displacement' issues. It is only regarded as additional' at regional level.

[33] GVA is Gross Value Added – this is the regional measure of GDP.

[34] The University's direct GVA in 2022/23 was £172.5m. As with output and direct employment, this was allocated 90% to Canterbury and 10% to Medway towns to reflect the estimated split of University activity between the two Campuses

[35] UK Domestic student expenditure impact is only included at regional level to take account of 'displacement' issues. It is only regarded as additional' at regional level.

Table 7 Employment impact (headcount jobs)[36] of the University and its students

Employment generated (headcount Jobs)	Jobs directly within the University[37]	Jobs generated through the secondary Impact of University Spend	Impact of International Student 'Off-Campus' Spend	Impact of UK Student 'Off-Campus' Spend'	Total Jobs generated
Canterbury	2997	1902	330	1099	6329
Medway Towns	333	251	36	170	791
Rest of Kent	0	765	128	459	1352
All Kent incl. Medway Towns	3330	2918	494	1729	8471
Rest of South East	0	2155	359	1297	3811
All South East	3330	5073	853	3026	12282
Rest of Uk	0	593	99	N/A[38]	692
All UK	3330	5666	952	3026	12974

Source: Viewforth Modelled Analysis 2024 Totals may not sum due to rounding

Table 8 Employment impact (expressed in FTE) of the University and its students

Employment generated (expressed in full time equivalent or FTE)	FTE employment directly in the University	Employment generated through Secondary Impact of University Spend (FTE)	Impact of International Student 'Off-Campus' Spend (FTE)_	Impact of UK Student 'Off-Campus' Spend' (FTE)	Total Impact (FTE)
Canterbury	2605.5	1294.2	224.6	747.6	4871.9
Medway Towns	289.5	170.6	24.7	116.0	600.7
Rest of Kent	0.0	520.3	87.0	312.3	919.6
All Kent incl Medway Towns	2895.0	1985.0	336.2	1175.9	6392.2
Rest of South East	0.0	1465.9	244.3	882.5	2592.7
All South East	2895.0	3450.9	580.5	2058.4	8984.9
Rest of Uk	0.0	408.8	68.2	N/A[39]	477.0
All UK	2895.0	3859.7	648.7	2058.4	9461.9

Source: Viewforth Modelled Analysis 2024 Totals may not sum due to rounding

[36] Modelled analysis is undertaken in FTE as an expression of labour demand. The results are converted to headcount jobs using the prevailing pattern across the South East Region of 1.47 headcount jobs for every 1 FTE.(*Business Register and Employment Survey* BRES 2024) The employment impact expressed in FTE is presented in Table 8.

[37] The University's direct headcount employment in 2022/23 was 3330 jobs (HESA 2024). As with output and GVA, this was allocated 90% to Canterbury and 10% to Medway towns to reflect the estimated split of University activity between the two Campuses, based on student numbers allocated to each campus.

[38] UK Domestic student expenditure impact is only included at regional level to take account of 'displacement' issues. It is only regarded as additional' at regional level

[39] UK Domestic student expenditure impact is only included at regional level to take account of 'displacement' issues. It is only regarded as additional' at regional level.

Concluding remarks

This report presents the results of a study analysing the economic impact of the University of Kent in the academic and financial year 2022/2023.

Results are presented for the impact of the University in terms of impact on output, employment and GVA at local, regional and UK level. Additional analysis was undertaken of the impact of student personal (non-fee) expenditure, disaggregated into impact of UK domestic students and international students.

The University continues to attract students into Kent from across the UK and abroad, with international student fees and personal expenditure representing export earnings for the UK. An estimate of the Per Capita impact of international students is included in Appendix Four.

At the same time the University acts to retain local students from Kent within the area, meaning that both their skills (and their spending) is retained within Kent and not lost to other parts of the UK.

This study shows that, through its activity as a large employer and purchaser of many local goods and services, as well as through the expenditure of its students, the University continues to be a vital player in the local and regional economy, generating jobs and output in Canterbury, Medway and across Kent as well as contributing to local and regional GVA.

For instance, the University has been shown to directly provide 2997 jobs in Canterbury and to generate a further 1902 through its expenditure. When the personal off-campus expenditure of students is taken into account a further 1429 jobs are generated over the course of a year, taking the total to 6329 jobs in Canterbury. This is equivalent to nearly 10% of Canterbury 2022 employment. [40]

[40] Nomis 2024. Canterbury had 67,000 employee jobs.

Appendices

Appendix One: University of Kent Multipliers

The Modelling system used for this analysis enables multipliers to be derived for the University of Kent (institutional impact only). These multipliers are derived from the tailored analysis. They are *outcomes* from the analysis.

Output Multipliers

UK: 2.43

Regional (South East): 2.24

All Kent (incl. Medway Towns & Canterbury) 1.71

Canterbury: 1.47

Medway: 1.06

In other words, every £1m of the University's own output generates an additional £1.43m of output in the UK, of which:

£ 0.47m would be in Canterbury

£0.06m in Medway

£0.18m in the rest of Kent

(£0.71m in all of Kent, including Canterbury and Medway Towns)

£0.53m in the rest of the South East

£0.19m in the rest of the UK

Employment Multipliers

UK: 2.33

Regional (South East): 2.19

All Kent (incl. Medway Towns & Canterbury) 1.68

Canterbury: 1.45

Medway: 1.06

In other words, for every 100 FTE jobs inside the University as a whole, the University generates an additional 133 FTE jobs in the UK, of which:

45 FTE in Canterbury

6 FTE in Medway

17 FTE in the rest of Kent

69 FTE across all of Kent, including Canterbury and Medway Towns)

50 FTE in the rest of the South East

14 FTE in the rest of the UK

GVA

UK: 2.10

Regional (South East): 1.96

All Kent (incl. Medway Towns & Canterbury) 1.56

Canterbury: 1.36

Medway: 1.05

In other words, every £1m of the University's own GVA generates an additional £1.10m of GVA in the UK,

Of which:

£0.36m in Canterbury

£0.06m in Medway

£0.14m in the rest of Kent

(£0.56m across all of Kent, including Canterbury and Medway Towns)

£0.40m in the rest of the South East

£0.14m in the rest of the UK

FTE jobs per £1m of University output

Every £1m of University of Kent Output generates 24.9 FTE jobs:

10.7 FTE in the University

4.8 FTE elsewhere in Canterbury

0.6FTE in Medway

1.9 FTE in the rest of Kent

5.4 FTE in the rest of the South East

1.5 FTE in the rest of the UK

(All UK: 24.9, ALL South East 23.4, All Kent (including Canterbury and Medway Towns 18)

Appendix Two: Data Sources and Methodology

Data used included information relating to the University's income and expenditure for 2022/23, taken from the University's published Financial Statements, together with staff and student numbers from Higher Education Statistics Agency [41]. Other data sources included the Office of National Statistics labour market and economic data (including NOMIS[42] and other official data and a number of University of Kent's own published documents such as the Annual Review for 2023.

Impact on the UK and South East Region was modelled using an input output model of the UK with a regional extension (using location quotients) for the South East. This model was purpose built for modelling higher education impact and has been used for many other university impact studies across the UK including those undertaken for major HE agencies and government departments as well as individual universities.[43] The model includes analysis of direct and secondary effects.[44]

The distribution of regional impact from Canterbury and Medway Towns across Kent and the rest of the South East was then analysed through the construction of a University of Kent-specific 'Gravity Modelling System.' This purpose-built Gravity Modelling System combined a range of mass and distance variables[45] to model flow of impact out from 2 key points of initial impact in the South East (Canterbury and Chatham) to reflect the 2 main centres of university campus activity. The distribution of impact from each initial point was modelled and the results were then combined to be able to present the overall flow of University of Kent impact across the South East.

Impact results are presented in terms of impact on output, employment and GVA. Modelled analysis of employment is undertaken in FTE, using FTE as an expression of labour demand. However, the core results are presented in headcount jobs, as this is a more realistic and intuitive expression of employment impact. The FTE are converted to headcount jobs using the prevailing pattern of fulltime to part-time employment across the South East. [46] Outcome multipliers were calculated for the University (i.e., for example, how many jobs are generated outside the University for every job inside the University) and these are included in summary here. It is important to note that this study involved detailed and bespoke analysis of the University of Kent and its impact. It did not use or 'borrow' multipliers from any other study or modelling system – the outcome multipliers presented are University of Kent-specific and are derived from the modelled results. This is only possible in studies which comprise original and bespoke modelling.

[41] The available data from HESA included staff numbers for 2022/23 and student data for 2021/22.Supplementary student data for 2023/24 was subsequently made available by the University and used to refine results.

[42] See: https://www.nomisweb.co.uk/

[43] This model was originally constructed as part of work for Universities UK in modelling UK higher education impact. The full mathematical specification of the model can be found in annexe B of the 2014 Universities Uk report *The impact of universities on the UK economy* http://www.universitiesuk.ac.uk/policy-and-analysis/reports/Pages/impact-higher-education-institutions-uk-economy.aspx

[44] Secondary effects incorporate **both** indirect and induced effects.

[45] (Labour Market data from *Nomis* https://www.nomisweb.co.uk/ combined with travel time by road)

[46] Taken from the Business register and Employment Survey (ONS 2022) Business Register and Employment Survey - Office for National Statistics (ons.gov.uk) The ratio for the South East was 1.47, with the Uk-wide ration of 1.45 being applied to the 'rest of UK' jobs.

Appendix Three: Per Capita Impact of International Students

Money brought into the UK by international students represents export earnings and a contribution to the UK Balance of Trade. Students pay fees to the University and have personal (non-fee) expenditure, on living costs – rent, accommodation, food, clothes, travel etc. The overall impact of impact of fee payments made is included in the analysis of the University's impact and the overall impact of student personal expenditure has been analysed and presented in the report. However, it is of policy relevance to consider the **per capita** impact of international students, which gives greater insight into the impact of changes in international student numbers. We have analysed the per international students studying at the University of Kent and the results are presented in the following tables.

International student fees

According to the University Accounts for 2022/23,[47] international students paid over £ 43.2m in fees to the University.

Other payments to the University

Students also pay other money to the university – for instance for residence and catering, where they stay on campus. According to the University accounts, university residence income in total came to £41.3m in 2022/23. We estimated that c.34% or just over £14m of this was likely to have come from international students (having studied University of Kent Accommodation provision and accommodation policies for non-local students.) The off campus modelled impact had been adjusted downwards accordingly, as that £14m would be included in the university impact. In assessing impact achieved through the money paid to the University therefore, that £14m of overall international personal expenditure was included with the fees paid to the University. This gave an estimated spend as follows:

Table 8: Estimated Overall International Student Spend

Estimated International Student Expenditure in 2022/23	3482 International students
Money paid to the University (Tuition fees and other payments e.g. residence)	£57.7m
Off Campus personal expenditure	£48.5m
Total	£106.2m
Per Capita	£30,500

Source: Viewforth Consulting Analysis

The modelled impact achieved through the student payments to the University was extracted from the University's overall impact and combined with the Students' personal expenditure to more clearly present the total economic impact due to international students and to derive a per capita impact figure. This gives a better idea of the potential impact on the economy of an increase or decrease in international student numbers.

[47] University of Kent Financial Accounts 2022/23

Per Capita Impact Results

Based on the data derived from the modelling process, each international student at the University of Kent generated:

- £62,268 of UK output in 2021/22 (£56,296 of which was in the South East)
- £32,348 of UK GVA (£29,727 of which was South East GVA)
- 0.6 FTE jobs (0.55 of which was in the South East). So every international student generates 0.6FTE in the UK (In other words 5 international students generate 3 FTE jobs in the UK) . Every international student generates over 0.55 FTE in the South East (so you could say every 2 international students generates over 1 FTE job in the South East.)

The detailed results are presented in the tables below.

Table 9: Overall and Per Capita Impact of international Students

Based on 3482 International Students at the University of Kent	Output Impact on the UK	Output Impact on the South East	GVA Impact on the UK	GVA Impact on the South East	Employment Impact on the UK (FTE)	Employment Impact on the South East (FTE)
Impact achieved through the money paid to the University (fees & related payments e.g. for accommodation)	£140.2m	£129.2m	£77.1m	£72.1m	1435.5	1348.7
Impact achieved through additional off-campus personal expenditure	£76.7m	£66.8m	£35.5m	£31.4m	648.7	580.5
TOTAL IMPACT	216.8	196.0	112.6	103.5	2084.3	1929.2
PER CAPITA IMPACT OF INTERNATIONAL STUDENTS	£62,268	£56,296	£32,348	£29,727	0.60	0.55

Source: Viewforth Consulting Analysis

Disaggregation of international student impact across the South East is shown in the detailed tables below.

Table 10: Overall and Per Capita distribution of international student impact across the South East and rest of UK

Output	Total £m	Per Capita £
Canterbury	**104.6**	**30032**
Medway Towns	**12.1**	**3487**
Rest of Kent	**20.8**	**5972**
All Kent incl Medway Towns	**137.5**	**39492**
Rest of South East	**58.5**	**16804**
All South East	**196.0**	**56296**
Rest of Uk	**20.8**	**5973**
All UK	**216.8**	**62268**

FTE Employment	Total (FTE)	Per Capita (FTE)
Canterbury	1053	**0.30**
Medway Towns	122	**0.04**
Rest of Kent	198	**0.06**
All Kent incl Medway Towns	1373	**0.39**
Rest of South East	556	**0.16**
All South East	1929	**0.55**
Rest of Uk	155	**0.04**
All UK	2084	**0.60**
GVA	**Total £m**	**Per Capita £**
Canterbury	**58**	**16781**
Medway Towns	**7**	**1939**
Rest of Kent	**10**	**2886**
All Kent incl Medway Towns	**75**	**21607**
Rest of South East	**28**	**8120**
All South East	**104**	**29727**
Rest of UK	**9**	**2622**
All UK	**113**	**32348**

Source: Viewforth Consulting Analysis

Appendix Four: Fully Disaggregated Impact tables

Table 11 Output Impact

Output generated £m	University Direct Output £m	Secondary Impact: Output generated through University Spend (including staff salary spend) £m	*Total University Output generated £m*	Impact through personal spend of students from Kent £m	Impact through personal spend of students from the rest of the South East £m	Impact through personal spend of students from the rest of the UK £m	Total Impact of UK student spend £m	Impact through personal spend of International Students £m	*All Student spend £m*	**Total Impact £m**
Canterbury	244.2	126.3	*370.5*	24.7	11.0	50.3	*86.0*	25.8	*111.8*	**482.3**
Medway Towns	27.1	16.6	*43.8*	3.8	1.7	7.8	*13.3*	2.8	*16.2*	**60.0**
Rest of Kent	0.0	50.8	*50.8*	10.3	4.6	21.0	*35.9*	10.0	*45.9*	**96.7**
All Kent incl Medway Towns	271.3	193.7	*465.0*	38.8	17.3	79.1	*135.3*	38.7	*174.0*	**639.0**
Rest of South East	0.0	143.1	*143.1*	29.1	13.0	59.4	*101.5*	28.1	*129.6*	**272.7**
All South East	271.3	336.8	*608.1*	68.0	30.3	138.5	*236.8*	66.8	*303.6*	**911.7**
Rest of Uk	0.0	51.4	*51.4*	0.0	0.0	0.0	*0.0*	9.9	*9.9*	**61.3**
All UK	271.3	388.2	*659.5*	68.0	30.3	138.5	*236.8*	76.7	*313.5*	**972.9**

Source: Viewforth Modelled Analysis 2024 Totals may not sum due to rounding

Table 12 GVA Impact

GVA generated £m	University Direct GVA £m	Secondary Impact: GVA generated through University Spend (including staff salary spend) £m	*Total University* *GVA generated £m*	Impact through personal spend of students from Kent £m	Impact through personal spend of students from the rest of the South East £m	Impact through personal spend of students from the rest of the UK £m	*Total Impact of UK student spend £m*	Impact through personal spend of International Students £m	*All Student spend* *£m*	**Total Impact** **£m**
Canterbury	155.2	62.5	*217.7*	11.6	5.2	23.7	*40.5*	12.2	*52.7*	**270.4**
Medway Towns	17.2	8.2	*25.5*	1.8	0.8	3.7	*6.3*	1.3	*7.6*	**33.1**
Rest of Kent	0.0	25.1	*25.1*	4.9	2.2	9.9	*16.9*	4.7	*21.6*	**46.7**
All Kent incl Medway Towns	172.5	95.8	*268.3*	18.3	8.2	37.3	*63.7*	18.2	*81.9*	**350.2**
Rest of South East	0.0	70.8	*70.8*	13.7	6.1	28.0	*47.8*	13.2	*61.0*	**131.8**
All South East	172.5	166.6	*339.1*	32.0	14.3	65.2	*111.5*	31.4	*143.0*	**482.0**
Rest of Uk	0.0	23.7	*23.7*	0.0	0.0	0.0	*0.0*	4.1	*4.1*	**27.8**
All UK	172.5	190.3	*362.8*	32.0	14.3	65.2	*111.5*	35.5	*147.0*	**509.8**

Source: Viewforth Modelled Analysis 2024 Totals may not sum due to rounding

Table 13 Employment Impact (Headcount)

Headcount (H/C)	DIRECT Jobs inside the University H/C	Secondary Impact: Jobs created through University Spend (including staff salary spend) H/C	*Total University Headcount*	Impact through personal spend of students from Kent H/C	Impact through personal spend of students from the rest of the South East H/C	Impact through personal spend of students from the rest of the UK # H/C	*Total Impact of UK student spend Headcount*	Impact through personal spend of International Students	*All Student spend Headcount*	**Total Impact Headcount jobs**
Canterbury	2997	1902	*4899*	315	141	643	*1099*	330	*1429*	**6329**
Medway Towns	333	251	*584*	49	22	100	*170*	36	*207*	**791**
Rest of Kent	0	765	*765*	132	59	269	*459*	128	*587*	**1352**
All Kent incl Medway Towns	3330	2918	*6248*	496	221	1011	*1729*	494	*2223*	**8471**
Rest of South East	0	2155	*2155*	372	166	759	*1297*	359	*1656*	**3811**
All South East	3330	5073	*8403*	868	388	1770	*3026*	853	*3879*	**12282**
Rest of Uk	0	593	*593*	0	0	0	*0*	99	*99*	**692**
All UK	3330	5666	*8996*	868	388	1770	*3026*	952	*3978*	**12974**

Source: Viewforth Modelled Analysis 2024 Totals may not sum due to rounding

Table 14: Employment Impact (FTE)

Full Time Equivalent Employment (FTE)	DIRECT Jobs inside the University FTE	Secondary Impact: Jobs created through University Spend (including staff salary spend) FTE	*Total University* *FTE generated*	Impact through personal spend of students from Kent FTE	Impact through personal spend of students from the rest of the South East FTE	Impact through personal spend of students from the rest of the UK FTE	Total impact of UK Student Spend FTE	Impact through personal spend of International Students	*All Student spend FTE*	**Total Impact** **FTE**
Canterbury	2606	1294	*3900*	215	96	437	748	225	*972*	4872
Medway Towns	290	171	*460*	33	15	68	116	25	*141*	601
Rest of Kent	0	520	*520*	90	40	183	312	87	*399*	920
All Kent incl Medway Towns	2895	1985	*4880*	337	151	688	1176	336	*1512*	6392
Rest of South East	0	1466	*1466*	253	113	516	883	244	*1127*	2593
All South East	2895	3451	*6346*	591	264	1204	2058	581	*2639*	8985
Rest of Uk	0	409	*409*	0	0	0	0	68	*68*	477
All UK	2895	3860	*6755*	591	264	1204	2058	649	*2707*	9462