

# Research into the need for additional student housing in Southwark

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# Introduction

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## Reason for the study

This study was initiated firstly in response to a growing number of planning applications from developers who wished to build accommodation for students, and secondly to inform the comprehensive review of Southwark's housing strategy.

Southwark's Unitary Development Plan does not contain any specific references to accommodation for students, although there is a policy relating to non-self-contained housing. The housing strategy does not currently mention student housing and there was little in the way of evidence or data to make it easy to assess whether there is an excess or a shortage of specialist student accommodation in the borough. It was felt that evidence and research was required in order to facilitate Development Control to make decisions regarding student housing planning applications.

Student accommodation is not considered to be affordable housing in planning policy, and developers producing it do not have to provide an affordable housing contribution.

Planning Policy Statement 3 & the London Plan and its supplementary guidance say local authorities must take into account and acknowledge that students need to be provided for and that local authorities' strategies must take students into account.

The main objectives of this research are to:

- Better understand the needs and current housing arrangements of students primarily in Southwark
- Identify the type of accommodation they want to live in
- Review student housing sectors - university halls of residence, commercial halls, the private rented sector
- Understand how student housing needs are to be met
- Determine the type of accommodation needed to meet student housing need and preference
- Consider where the future demand for student housing will be

## Definitions

For the purpose of this research the definition of a student was agreed at a project start up meeting between Strategy & Policy and Planning Policy as 'full-time students in higher education over the age of 18 and up to 25 years'. The upper age limit has been set at 25 years to include post graduate students. Some data, however, relates to a wider age range, and this has been used where it adds value to the study.

For the purpose of this research project, the study focused on the three principle types of student accommodation:

- University halls of residence
- Commercial halls of residence
- Private rented sector

However there are students living in other tenures, such as in local authority homes, and these have been noted where appropriate, but not examined in detail. The emphasis was on institutional, purpose built student housing due to the need to provide information for the Local Development Framework.

## Methodology

The methodology used to inform this research project included the following:

- Review of existing literature relevant to student accommodation including Southwark's Unitary Development Plan, the London Plan & sub documents and GLA study of student housing
- Review of existing data, including housing needs survey, 2001 census, council tax records
- Desk top research consisting of an analysis of reports and various studies on websites,
- Face-to-face and telephone interviews with a range of higher education establishments in and outside of Southwark. To ensure consistency each establishment was asked the same series of questions and asked to provide copies of policy documents for analysis. The interview took approximately 1 hour to complete
- Attendance at a conference on student housing hosted by University of London.

To inform this research project four higher education establishments were studied, three situated in Southwark,

- Kings College of London (Institute of Psychiatry)
- South Bank University
- University of the Arts London consisting of five colleges, two of which are in Southwark: Camberwell College of Arts and The London College of Communication. For the purpose of this research project Camberwell College of Arts is the research subject

The fourth establishment was Goldsmiths University situated in the north of the borough of Lewisham. Goldsmiths University was included in this research on the basis that it is very close to Southwark borough boundaries and may have a number of Southwark residents as students in addition to a number of its students who do not generally reside in Southwark occupying accommodation in Southwark.

The establishments in Southwark provide higher education to some 43,200 students (full and part time). However, this does not mean that there are a similar number of student units of accommodation in the borough. Many people studying in Southwark will reside out of borough. A number of students attending institutions such as South Bank are indigenous Southwark residents. Conversely there will be students attending other institutions, such as those in Central London or neighbouring boroughs, who will look to Southwark when searching for accommodation. The figure quoted includes both full and part time students, although the needs of part time students are not considered in this report.

The examination of these institutions is enough to provide a useful and robust representation of the situation in Southwark.

# Chapter 1 – Policy Context

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## National Policy:

### Government Targets

The Government has set a target of increasing the rate of participation of young people in Higher Education to 50% of 18-30 year olds by 2010. Current levels are around 41% [GLA study p3]. More about this is in Chapter 2.

### Planning Policy Statement 3

Planning Policy Statement 3, [Housing] was published by the CLG in November 2006. This sets out the national planning policies for housing, which regional and local authorities must take into account when developing regional spatial strategies and local development frameworks. Annex C suggests that future Strategic Housing Market Assessments would consider future demographic trends and identify the accommodation requirements of a range of specific groups including students. However there is no specific guidance on how student housing need should be assessed. It does however state that shared housing and communal establishments are important housing types. Partnerships are likely to have an interest in housing issues because of their vulnerability (e.g. homeless households or the elderly), or because of the economic impact of having such groups in an area (e.g. students or workers with tied accommodation).

## Regional policy [London]:

**The London Plan** - The Mayor's London Plan [Feb 2008 edition] discusses at various points the need for student accommodation in the Capital, although without providing specific direction or targets. It notes the following:

'Provision of purpose-built student housing adds to the overall supply of housing and may reduce pressure on the existing supply of market and affordable housing. Provision of purpose-built student housing should be monitored separately from provision in relation to targets for social housing and intermediate provision, as these are targeted at different needs.' [P74, para 3.39]

'There will be some sites that are capable of achieving more towards meeting the overall 50 per cent London-wide affordable housing target and some less. It is recognised that in most cases, some level of subsidy will be necessary to achieve the maximum outturn, the exception being the highest value sites, where the desired level of affordable housing can be funded entirely from development value. Where a proposal for development relates solely to student housing, it will not normally be appropriate to apply a planning obligation for an element of social rent or intermediate housing (see paragraph 3.37).' [P77, para 3.53]

### Policy 3A.25 Higher and further education

'The Mayor will and boroughs should work with the LDA and the higher and further education sectors to ensure that the needs of the education sectors are addressed in DPDs (see also Policy 3B.5). This will include:

- promoting policies aimed at supporting and maintaining London's international reputation as a centre of excellence in higher education
- taking account of the future development needs of the sector, including the provision of new facilities and potential for expansion of existing provision
- recognising the particular requirements of Further and Higher Education Institutions for key locations with good public transport access, and having regard to their sub-regional and regional sphere of operation
- supporting the provision of student accommodation.

Provision for the education sector must take account of the other policies in this plan, including mixed use, safety, sustainable design and construction, inclusive design, enhancement of the

public realm and the protection of Green Belt, Metropolitan Open Land and other open spaces in London. Further information on implementation will be set out in SRIFs.'

**London Plan Housing Supplementary Planning Guidance (SPG)** published in November 2005 and quoted in the GLA study, provided more detail on London Plan policies on housing provision and affordable housing. In particular, it states that:

- It considered that student accommodation can be counted as non self-contained accommodation.
- Acknowledges that students need to be considered in relation to housing mix and choice.
- Students also need to be considered in local housing needs assessments.
- Boroughs should liaise with Higher Education institutions to make provision.
- Purpose built student accommodation is often used in a temporary manner (i.e. it is not the student's permanent home). It should not be considered affordable housing and/or counted towards affordable housing targets. Student accommodation should not have affordable housing obligations.

The Housing SPG states at paragraph 16.1 that "Student housing should not be considered as equivalent to social housing, as it is not permanent housing and is only provided on the basis that an individual is a member of a specific educational institution. The provision of purpose built student housing should be monitored separately to the provision of social housing and intermediate provision and should not be counted against targets for either of these provision categories".

**The London Housing Strategy** The London Mayor is responsible for an overriding housing strategy for London and allocation of the Regional Housing Pot. Following the election of a new Mayor in May 2008 the existing draft London Housing Strategy has been withdrawn and a new one will be issued later in 2008. In July 2008 the Mayor published a scoping document 'Planning for a better London' to indicate how he would like to 'improve planning in London'. There is nothing specifically about students in this document, except a note that people who move to London tend to be young adults, such as students, or those with their first jobs, and that there are an increasing number of Londoners who are of school age, with 22% of Londoners being under 18.

## **Sub-Regional policy [SELHP]:**

The South East London Housing Partnership comprises five boroughs: Southwark, Lewisham, Greenwich, Bexley and Bromley.

The South East London Housing Strategy has as its first objective:

**Provide sufficient new good quality homes in all tenures that are affordable**

To ensure there are sufficient high quality new homes in all tenures to meet housing need in the sub region. This includes meeting the specific needs of particular groups, addressing affordability issues and combating overcrowding.

There is no mention in the strategy of student housing.

## **Southwark policy**

**Southwark Unitary Development Plan.** Southwark UDP does not contain specific policies on student housing. Students are mentioned, however, in the policy on non-self contained housing, as follows:

#### **“Policy 4.7 Non self-contained housing for identified user groups**

Appropriate new development or changes of use which provide non self-contained residential accommodation will normally be permitted where:

- i. The need for, and suitability of, the accommodation can be demonstrated by the applicant
- ii. Its provision does not result in a significant loss of amenity to neighbouring occupiers
- iii. There is adequate infrastructure in the area to support any increase in residents; and
- iv. The development provides a satisfactory standard of accommodation, including shared facilities. Provision must be made within the development for adequate amenities and facilities to support the specific needs of the occupiers, including staffing, servicing and management arrangements, with particular consideration given to the specific needs of children.

#### **Reasons**

Houses and flats are unsuitable for some groups within the community, and accommodation must be provided to meet the specific needs of these groups.

Non self-contained accommodation might include hostels, houses in multiple occupation, ‘cluster flats’, or residential institutions such as a care home. It may include facilities that provide care or support for occupiers such as the elderly, or accommodate specific groups on a temporary basis such as **students**, nurses and NHS workers, homeless people and asylum seekers. The LPA must seek to house all sectors of the community, and therefore provision must be made for alternative accommodation arrangements.

It is noted, however, that non self-contained housing is unsuitable for general needs housing, and should only be developed for those whose needs can not be met by the provision of self-contained accommodation.”

[It should be noted that not all student accommodation is non-self-contained.]

There are design standards for non-self contained housing set out in the new Residential Design Standards SPD:-

#### ***LBS Residential Design Standards 2008 for Student Accommodation***

##### **4.3 Student housing**

Student housing can be in the form of halls of residence, cluster flats or self contained units. To ensure that the appropriate levels of student accommodation are supplied in the borough without prejudicing the development of general needs housing, planning applications for student accommodation will have to be accompanied with evidence that there is an identified local need for this type of housing, including:

- A letter from a recognised local educational establishment
- Confirmation that the accommodation will be affordable to the identified user group
- Details of security arrangements
- Details of the long-term management and maintenance arrangements of the student accommodation.

All student accommodation should be located in areas that are easily accessible to public transport and have a public transport accessibility level of 4 and above.

***Southwark Housing Strategy.*** This does not currently contain strategies with regard to students. However the housing strategy is currently under review [as at November 2008].

## Future policy direction

The Government commissioned the Centre of Housing Policy at the University of York to carry out a review of the private rented sector. In the paper introducing this review, the Government said: “In recent years we have seen the growth of commercial providers of high quality student accommodation. Success in designing a financial model that supports new build designed for a broader private rented market would be an attractive product in the housing market. Such investment models could support more professional approaches to being a landlord and help improve the overall quality of the [private rented] sector.”

A report on Houses in Multiple Occupation was released by the CLG in October 2008. This report looks at problems experienced in areas that have a high percentage of HMOs, especially those occupied by students. It documents problems such as ‘ghost towns’ in college holidays and anti-social behaviour caused by crowds of young people. It suggests more specialist student housing and giving local authorities power to restrict the numbers of HMOs in their districts via ‘Use Classes Orders’. However the Rugg report: ‘The private rented sector: its contribution and potential’ by J Rugg & D Rhodes does not favour these. The HMO report also discusses the merits of accreditation schemes. The Minister for Housing has welcomed the report, and the Government will need to consider how and to what extent it translates the report’s recommendations into policy. [see further details in Appendix 3]

The report states that the private rented sector is complex and is best understood through mapping its constituent niche markets. The markets are defined in terms of demand and supply characteristics, distinctive rental practices and – in some cases – specific types of central policy intervention that shape the way the sub-market operates. Students are recognised in the report as a distinct sub-market, “students, whose needs are increasingly being met by larger, branded, institutional landlords”.

The review of the private rented sector: its contribution and potential concludes with a series of recommendations on policy ‘direction of travel’ that seek to maximise the full potential of the private rented sector

- The need for the development of a sound evidence base and greater understanding of the sector and the way it operates
- Better understanding of the managing rented housing amongst landlords and managing / letting agents and amongst local authorities devising strategies for addressing issues in the sector
- Government should divide initiatives to ‘grow’ the business of letting
- Equalising the rental choice, low-income households should be able to make a real choice between a social or private let
- Light-touch licensing and effective redress, the existing regulatory framework does not offer sufficient sanction where landlords openly contravene regulations

John Denham, the Secretary of State for the Department of Innovation, Higher Education and Skills, gave a speech earlier in the year announcing how he intended to review and develop the higher education sector. He announced that he had asked Liverpool University to research how the system could ‘make the most of global opportunities’ with regard to future development of the international role of British education. It is clear that the Government wants to encourage further future development in the international student sector.

## Chapter 2 – The student population

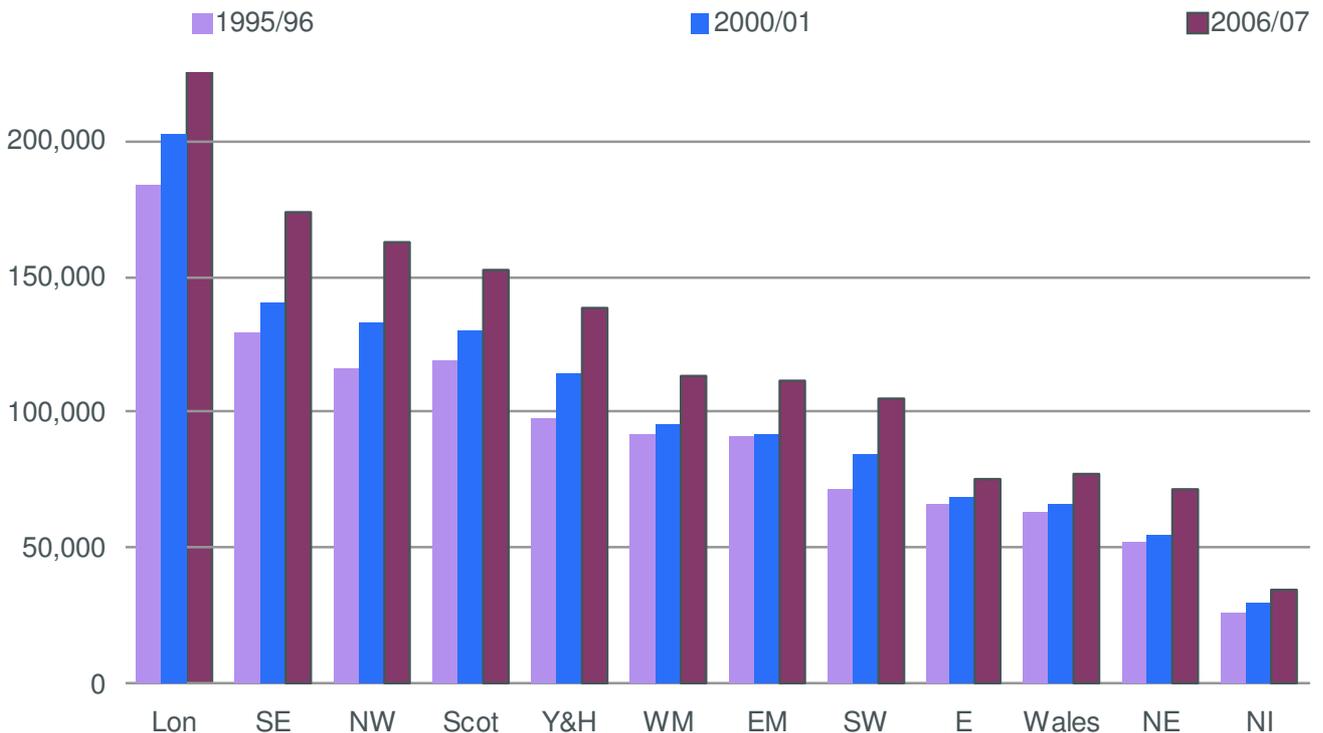
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### Changing numbers

The Government wants to increase the proportion of young people going into higher education, and over the last few years, student numbers have been steadily growing. The factors that affect future student numbers nationally are:

- demographic changes in the numbers of young people of student age,
- the changing rate of participation or propensity of young people to become students, and
- the numbers of students that come from outside the UK.

### Full-time student numbers



[Source: Savills presentation to London Student Housing Conference June 2008]

This table indicates that student numbers have been growing, both nationally and in London, over the past five years. However the big question is whether this will continue in the future.

On a regional basis there is the additional factor of whether students decide to study within their own region or to move elsewhere to carry out their studies.

The Greater London Authority commissioned a London Student Housing Requirements Study, which reported to the London Development Agency in May 2007 [hereafter referred to as 'The GLA Study']. The main aim of this was to inform the implementation of the London Plan and borough policy and to assess the impact that growth in the Higher Education [HE] sector may have on housing requirements and housing markets in Greater London [London Student Requirements Study, May 2007]. This looked at a wide range of demographic and other statistical evidence and attempted to predict the likely effect that changes in student numbers would have on housing requirements and housing markets in Greater London. This report has not been published. However it does contain useful data, which is quoted in this study. Additionally a number of commercial organisations have produced data to assist private developers looking to invest in student housing, and this is quoted here where relevant.

The Executive Summary of the GLA study states that: “A reconciliation of Census and HESA data shows 377,800 HE students in London in 2004/05, of which term-time accommodation is broken down as follows:

Parental/guardian home in London	58,300
Parental/guardian home outside London	19,400
Communal housing	33,000
Other institution maintained property	12,000
All student household in London	66,400
Student living alone in London	25,500
Student and non-student household in London	109,400
Household living outside London	22,400
Other housing within or outside London	31,400
<b>TOTAL</b>	<b>377,800</b>

Source: GLA study Executive Summary”

The table above suggest that there are some 45,000 students living in specialist housing in London, plus some 78,000 students living with their parents and the remainder, some 200,000 living in other non-specialist housing either alone, with other students or within other households. However the figures above seem to include part time students [perhaps 7,500] and may include students under the age of eighteen [the report is not clear]. Students in further, rather than higher, education may also be included.

Information from Savills [a private consultancy] however, suggests that the total number of students is considerably lower, with around 240,000 full time students in London, although the numbers living in institutional housing is broadly similar.

UCAS provides data taking the form of static data tables. Tabled below, are the number of successful UCAS applicants. The number of accepted applicants is close, but not necessarily identical, to the numbers who actually enrol.

UK Region	2003	2004	2005	2006	2007
Greater London	55,168	56,686	62,436	61,043	63,461

This shows that the numbers of students enrolling has been rising for a number of years.

### Demographic Changes

It is projected that the number of 18 year olds in the UK will decline by 16.2% between 2009 & 2020. A similar decline in the 18 year old population is prevalent throughout the EU, with the exception of the Irish Republic, where 18 year olds are projected to increase by 11% over the same period. [Source: ‘Successful Renting – The official magazine of the National Federation of Residential Landlords’ p36, Q2 2008]. The article goes on to say that the demographic trend should start to reverse in 2020. This is significant because it means that the pool of young people who could potentially become students will be smaller.

### Propensity to enter higher education

The Successful Renting publication quoted above states: ‘numbers of female 18 year olds and the numbers of 18 year olds from ethnic minorities are both proportionally higher over the same period, [i.e. 2009-2020] and both these groups have a higher propensity to go into higher education.’ In addition, it claims, the decline in the numbers of 18 year olds is more highly concentrated in lower socio-economic groups, who have less tradition of going into higher education. The GLA study agrees with this and it says that ‘we have assumed that increased participation will lead to the number of UK based students remaining static’. [para 5.27]

### International Students

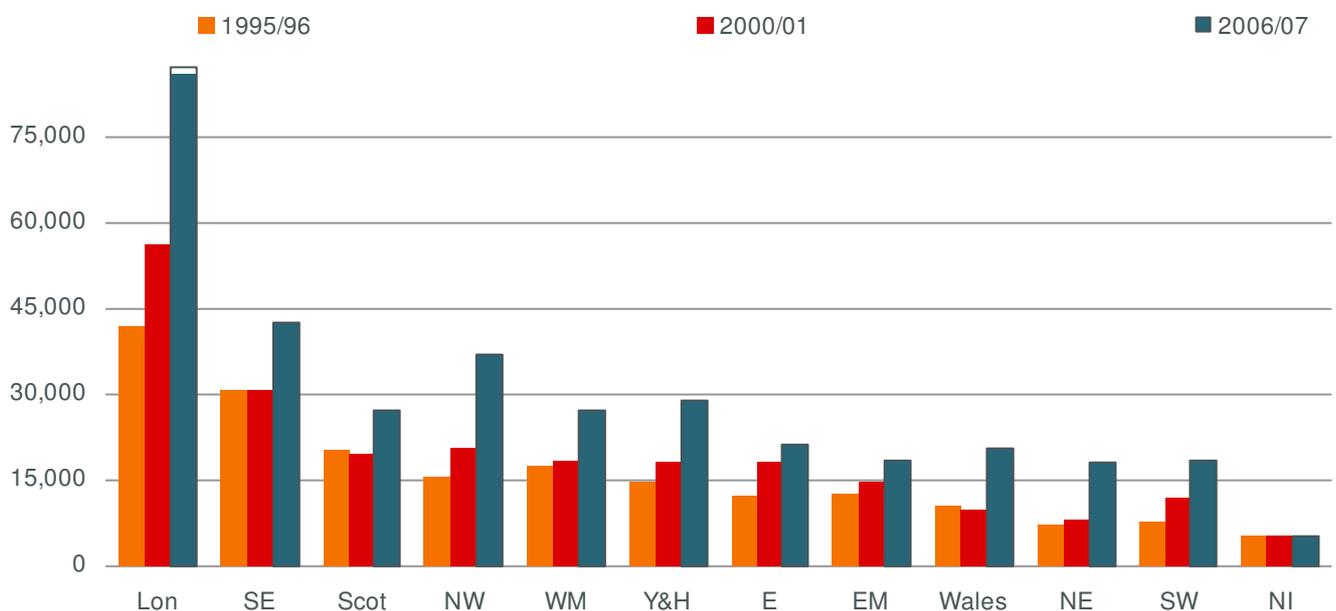
Over recent years there has been an increasing number of international students coming to the UK for their education. Both the Greater London Authority and London educational institutions have been marketing to attract students from overseas, and this has resulted in numbers of

overseas students rising from 42,000 to 87,000 over ten years, with the rise being steepest during the last five years. There is little sign that this trend will change, although the demographics from individual countries does alter over time according to the situations and economies of those states. The largest numbers in recent years have consistently come from China, Greece, the United States and India, with Germany and Pakistan following closely. [see Appendix 4].

'Study London' is a GLA initiative to market London as an ideal place for students to study, and higher education institutions such as the London College of the Arts have offices in other countries with the specific purpose of attracting overseas students.

This study found that Goldsmiths have many students who are sponsored by major companies, especially American ones, and that they are planning to develop specific programmes to attract more international students through this method. This of course could be affected by a downturn in the American economy and in the fortunes of sponsoring companies.

### Rapid growth in overseas students in last five years



Source: Savill's presentation to student housing conference June 2008

The growing number of international students is a counterweight to the decline in the UK younger population, and numbers may continue to increase. However this is a global market and there is strong competition from the USA and elsewhere. The GLA study assumed a continued growth on the basis that 'discussions with many of the individual HEIs identified that it was the international market that they expected to expand'

The GLA study predicted the following growth in student numbers:

## Projected student numbers for London Higher Education Institutions [HEIs] by Mode & Level of Study and Domicile

Student Type	2004/05	2009/10	2014/15	2019/20
<b>Mode &amp; Level of Study</b>				
Full-time Undergraduate	188,100	200,900	210,100	219,200
Part-time Undergraduate	75,600	83,500	87,800	92,000
Full-time Postgraduate	53,800	67,300	79,800	92,400
Part-time Postgraduate	60,300	65,600	69,500	73,400
<b>Domicile</b>				
London	190,800	205,300	219,800	234,400
Rest of UK	104,400	99,600	85,100	70,600
Overseas	82,700	112,500	142,300	172,100
<b>TOTAL</b>	<b>377,800</b>	<b>417,400</b>	<b>447,200</b>	<b>477,000</b>

Source: *The GLA Study, table 5.3 from Modelled projections based on base data from HESA and HEFCE*

Taking out the data for full time students from above [because they are most likely to be the ones requiring student accommodation], numbers are predicted to be as follows:

Year	Numbers of Full Time Students
2004-5	241,900
2009-10	268,200
2015-5	289,900
2019-20	311,600

However, caveats on the above are that:

1. The figures show a large increase in London based students, as against those who come from elsewhere in the UK, and these are less likely to require specialist housing. However it is not possible to tell from the data how much of the London increase is for full time or part time students;
2. The GLA study was carried out before the 'credit crunch'. A worldwide economic recession could reduce the trend for international students to come to the UK.

### Types of Student

The GLA study considered that as a conservative estimate of the number of full-time undergraduate students will increase by 2,600 annually to 2010 and by 1,800 per annum afterwards, reaching a London total of 219,200 by 2020. The numbers of postgraduate students it expects to grow more slowly, and is likely to contain a higher proportion of international students. The study says that the growth in full time postgraduates is mainly attributable to overseas students.

The number of students from London households is anticipated to increase by 2,600 each year until 2020; however this is partially offset by a decline in students from the rest of the UK.

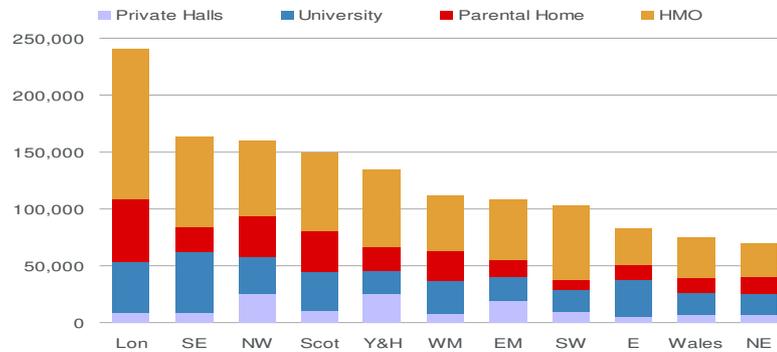
It is the view of the establishments researched in Southwark that the number of overseas students is steadily increasing. All have cited this group as an area of development for the establishment's strategic objectives as it linked directly to the sustained economic growth of the institution.

Anecdotal evidence from this research project suggests a sustained growth in the number of students living in shared housing (Houses In Multiple Occupation or HMOs) and commercially operated halls. It is commonly suggested that international students are more likely to prefer purpose built student accommodation than UK resident students. The view is that numbers in this housing sector are expected to continue to increase. Post graduates also have higher expectations and are more likely to want self-contained accommodation.

## Where are students living



### Students live predominately in HMOs



Source: Savills, HESA

### Full time students in London 2005-6 [extracted from above]

Private halls	8,773
University Accommodation	44,298
Parental Home	55,699
Houses in Multi-Occupation/other	132,548
<b>Total</b>	<b>241,318</b>

Source: Extracted from Savills presentation to London Student Housing Conference June 2008

## Students in Southwark

Southwark has a large and diverse student community. Most of the higher education institutions are located towards the North of the borough, so this is where students mostly live. Southwark has students that both live and study in the borough, and students that study elsewhere, typically central London, but have accommodation in Southwark. There will also be those that travel into the borough from elsewhere. More about this is in Chapter 4.

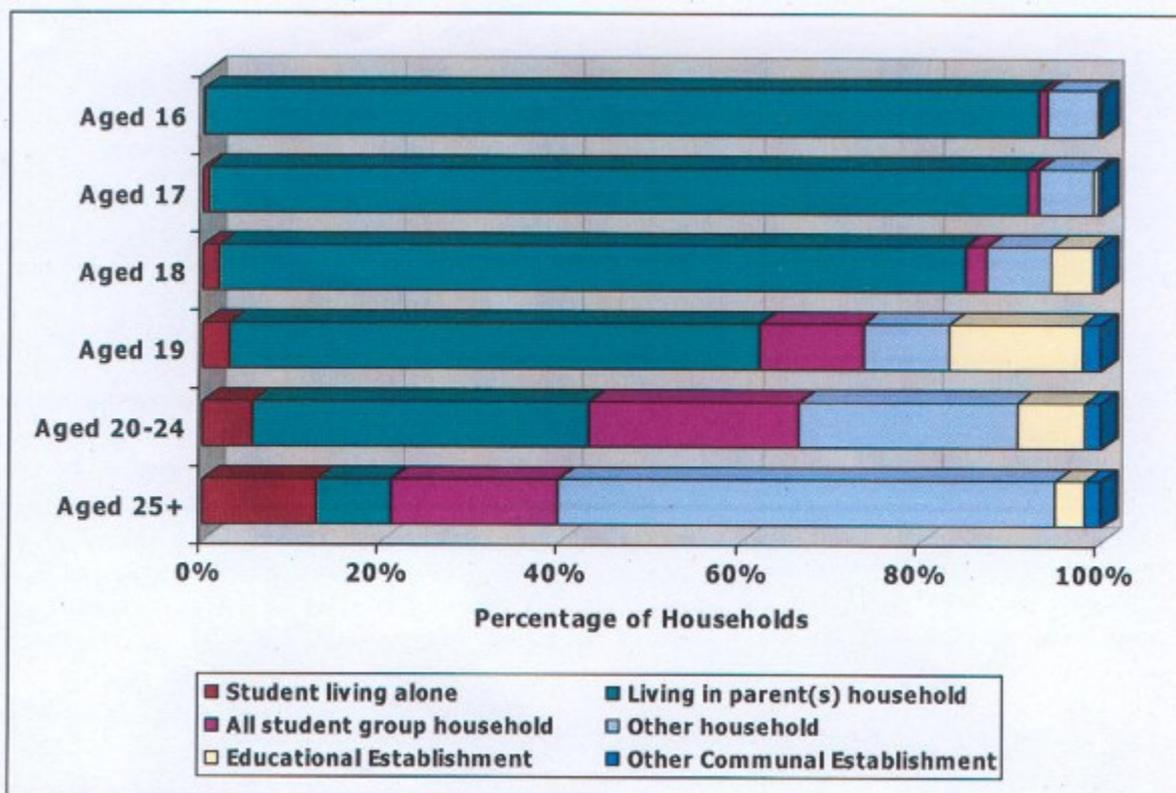
### Census data

The 2001 Census reported that Southwark was home to 17,195 full time students [source: 2001 Census quoted in the GLA study]. Of these 2,800 were living with their parents and 6,156 were living in 'other households', i.e. households containing both students and non-students. It should be noted that these figures relate to all students of all ages from 19 upwards.

The GLA commissioned its own data, but the age band in the 2001 census published tables is from 16 to 24, making it difficult to extract an estimate of the numbers who are actually in higher education. In addition the census records do not consistently use higher education categories so data appears random and difficult to cross reference and analyse. It is also worth noting that the census is relatively dated and consequently would not accurately reflect the current situation in Southwark. For these reasons the view is that the data can only inform planning policy in a very limited way.

Analysis done by the GLA indicates that those students living in ordinary housing, either alone or as parts of other households, are more likely to be in older age groups than students in general.

Figure 3.2: Proportion of students resident in London in each Type of Accommodation by Age



Source: UK Census of Population 2001

**Southwark Housing Needs Survey 2003.** This estimated that there were 2,433 student-only households in the borough. However these were not included in the affordable housing calculations except where they were living in 'ordinary accommodation'.

**Southwark Housing Requirements Study 2008.** This is not primarily about students but may contain a small amount of useful data on the existing student population. The report is due by December 2008.

**Sub-regional Strategic Housing Market Assessment.** This will pull together Housing Needs data from the five South East London Housing Partnership boroughs. It will contain a special section on student housing requirements. Survey data about the needs of students will be extracted at sub-regional level and additional stakeholder interviews may be carried out. The first draft of this report is expected in early 2009. When this is received, additional comments may be added to a later edition of this study report.

## Conclusion

There is insufficient up to date borough wide information about students and where they live apart from the above and many sets of data use different bases and definitions. The Census, in particular, is becoming too old to be informative. HESA [the Higher Education Statistics Agency] lists numbers of students registered by institution, but that does not tell us where the students are actually living and furthermore, many of the institutions themselves have campuses and/or accommodation located in more than one borough. Students registered at a higher education institution located in Southwark may live in the borough or in neighbouring boroughs. If they came from Southwark in the first place most will still live at home. Conversely students registered in other London boroughs may choose to live in Southwark for a number of reasons, including location and transport links and the relative costs of accommodation.

In summary there were around 242,000 full-time higher education students in London during 2004-5, with a projected rise to around 312,000 by 2020. This is a rise of 29%, or around 2% per annum. At the time of the 2001 census there were around 18,000 full time students resident in Southwark. If this figure rises in a similar fashion to the rest of London the borough would have around 24,000 full-time higher education students by 2020.

If the present trend continues, student numbers are likely to rise, due to increases in students coming from abroad. Higher education institutions have been developing programmes to attract more international students. However the worldwide recession brought on by the 'credit crunch' could change much of this.

To get a better understanding of numbers and need it is essential to look at the experience of accommodation staff in the institutions themselves and to consider what plans they have. Findings are detailed in chapter3 and 4.

## Chapter 3 – Student Accommodation

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### Types of Accommodation

The traditional model for student accommodation is a first year in specialist communal accommodation arranged through the educational institution, with subsequent years spent in shared private sector housing with groups of other students. Evidence shows that students' needs, wants and aspiration have become more complex over time. [source: visits to colleges, student housing conference, GLA study] Changes in government policies, demographics, diversity, academic attainment, career aspirations and expectations informed by an increasingly competitive employment market have greatly altered the student perception of higher education study. These have also influenced the type of course opportunities offered by institutions.

However, some traditions remain. Students by and large select their preferred university based on the academic standing and reputation of the institution. In addition, they are attracted to the particular cities and towns where universities are located. Students attend university to attain a degree but they are also going for the student 'experience', so social amenities and vibrant communities are also high on the list.

Students are now expecting higher quality accommodation with facilities such as internet access, CCTV and more choice in terms of type and style.

### Student Preferences

The institutions interviewed report that first year students have continued to demand campus based halls of residence accommodation. This is largely owing to the fact that for most it will be their first experience of independent living and therefore they gravitate to accommodation that reflects 'nest' of home in terms of stability, comfort and security. Parents also influence this inclination for similar reasons and are often willing to contribute financially for their own peace of mind.

The accommodation managers of the institutions interviewed report that second and third year students prefer to 'flee the nest' and seek more independence from the rules and regulations found in traditional halls of residence. This segment has a propensity to secure accommodation in the private rented sector. The typical model is house sharing, usually a HMO or flat. The universities associated with this research provide little or no services around securing accommodation in the private sector. However students do utilise housing advice services provided by the university or partner agencies.

Post graduates can be more affluent (employed, sponsored) than the traditional student type and therefore demand more in terms of accommodation. There are greater demands for good quality self - contained accommodation as these students are typically older and therefore have more mature demands and needs. Emerging is the demand for couple or family accommodation, although it is difficult to assess the true demand as most universities market student accommodation at single people and this may deter other household types.

### Commercial Halls

The growing numbers of overseas students have high expectations and demands in terms of accommodation specification, style, hospitality and services, hence the gravitation to commercial halls of residence. Like post graduate students, this group typically want self contained accommodation. Some have no networks in England and therefore require accommodation that has more to offer than the standard accommodation that indigenous students occupy. They can pay full actual costs and therefore expect good value for money. Commercial developers often try to attract high income students by offering enhanced design standards. For example, Opal student dwellings include:

- larger than average deluxe rooms
- self contained studio apartments
- Broad band access in individual units

- Integral leisure facilities, gyms, swimming pools
- Fully considered acoustic and heating requirements

The institutions interviewed report that students tend to study and stay in the same accommodation type and locality throughout their study term.

### **Accommodation Units**

Purpose built student accommodation can take the following forms:

- Rooms where meals and services are all provided
- Individual self-contained studio flatlets
- Cluster flats – where groups of, say 4 or 5 rooms are together with shared facilities such as kitchen, living area and bathroom.

These are in descending order of cost to the student. Anecdotal evidence is that both international students and older students and post-graduates are more likely to prefer individual studios, whereas shared 'clusters' are more attractive to younger undergraduate groups who like the social life they experience in shared housing.

### **Accreditation Schemes**

Universities have developed a code of practice for large commercial student developments, launched in July 2008. The Code's aim is to ensure a transparent set of management standards with full accountability to student consumers. The Code is managed by Unipol and 'reflects institutional cultures, introduces a peer-to-peer verification and inspection routines to ensure compliance'. Some further details, including a link to the code, are in Appendix 8.

## **How Student Accommodation is Delivered and Financed**

There are a number of different types of organisations that want to develop student housing:

- Educational institutions can develop property themselves, then either manage it themselves or contract out the day to day management – This is how much of existing provision was provided, but is increasingly uncommon.
- Educational institutions can go into partnership with private developers; for instance Unite both own and manage accommodation in Camberwell on behalf of University of the Arts London.
- Specialist companies can develop new provision alone, then market the accommodation and manage it entirely themselves.
- Property developers can develop new provision, and then sell individual units to investors. A company is set up to market, let and manage the blocks.
- Individual private landlords can purchase flats or houses and let them out to students. This is in effect private rented housing that happens to be used by students, frequently HMOs.

### **Student Housing as an Investment**

A number of investment companies encourage and facilitate potential developers and landlords who are considering entering the student market.

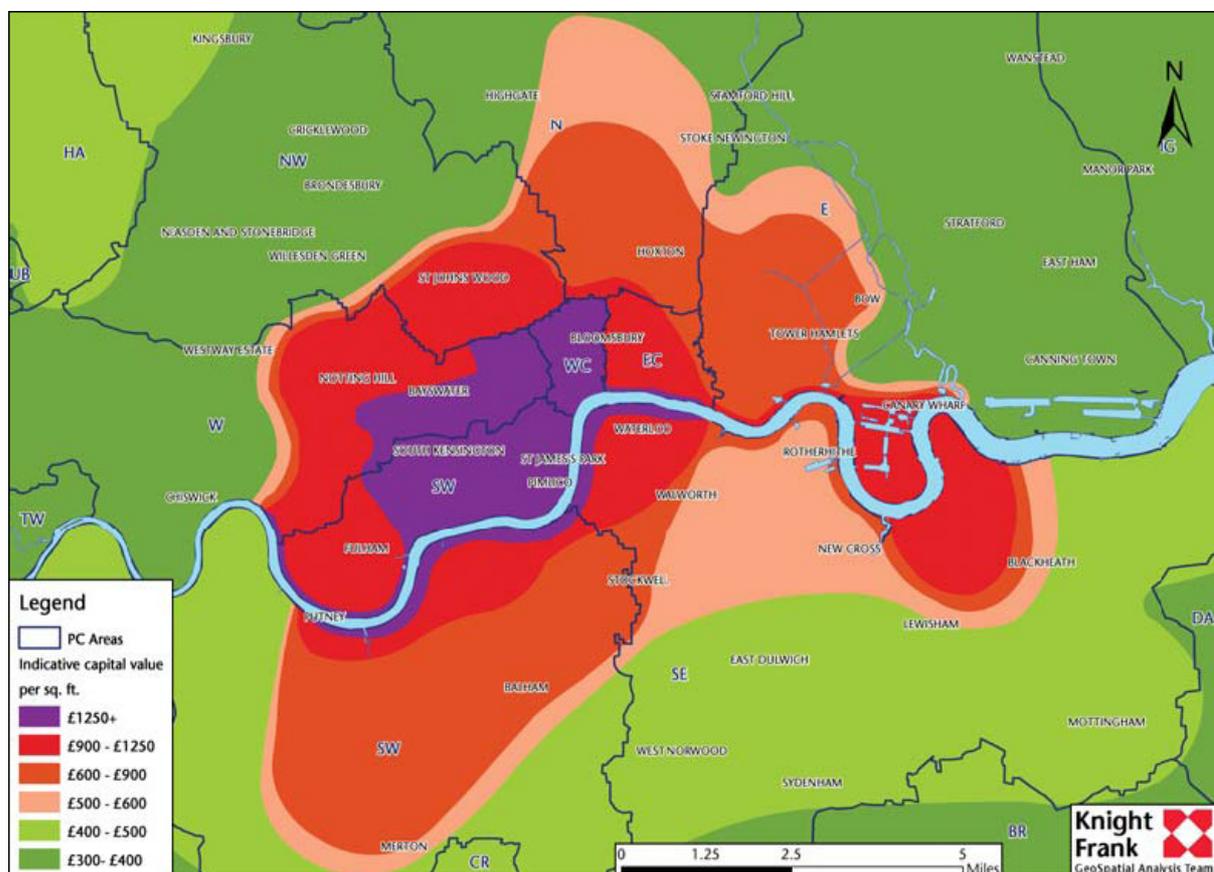
**Knight Frank Newmark London** is an independent real estate services company providing solutions to real estate issues. They have published reviews on the trends in the student accommodation market which provide a valuable insight into the student accommodation investment sector. They see students [and London ones in particular] as an emerging asset class in their own right with untapped economic opportunity and potential.

In its 2008 research publication Knight Frank Newmark reports:

1. The student accommodation sector offers commercial developers and investors rewarding opportunities as the market is still immature with a limited number of operators;
2. The overseas student market may influence pricing for accommodation in London. International demand is supporting capital values of over £1,200 per sq ft in central London.

3. The prime student market in London typically sees values of £700 to £900 per sq ft being achieved, with rental levels and investment yields exceeding the £1,200 per sq ft in Bloomsbury.
4. Private operated halls have seen significant growth in market share. It is estimated in 2005 this type of accommodation accounted for around 7% of all bed spaces and this figure had grown to around 10% in 2007.
5. Student accommodation is an attractive investment opportunity because demand (i.e. the number of students) has grown year on year without exception, increasing financial gains, particularly in terms of rent and secure covenants, with distinctive lease structures and rent review patterns.
6. The UK property market at present is slower which in turn increases investment risk in traditional property sectors. In light of these changing conditions the student sector is likely to seem more attractive with a growing rental stream and demand. London has a large number of students with relatively few available bed spaces.
7. Investments returns, average weekly rents for student accommodation increased from £67 in 2003/04 to £82 in 2006/07, a higher growth rate than the Retail Price Index over the same period. Privately operated halls' baseline rents are typically lower than the overall average, but this figure does not reflect the true cost to the student as it does not include for instance, internet and energy costs. Factoring in these additional costs increases the average rents for private operated Halls to £88.
8. Anticipated growth in student rents over the next three years is over 4.5% per annum.
9. Prime student markets in most areas of London ranked highest, apart from Edinburgh, in terms of latent demand for student accommodation and therefore for privately operated halls. Achieved rents and capital values are also highest in London.

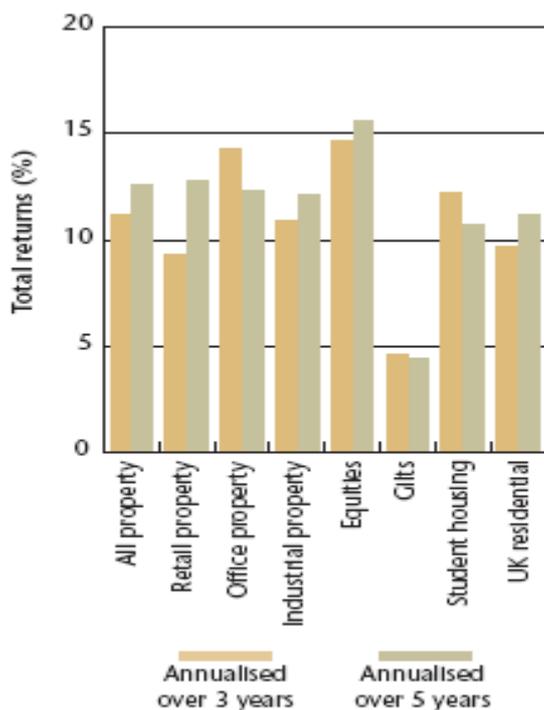
The map below shows indicative capital values of privately operated halls in London. Knight Frank show this map as illustrating the capital return that can be achieved by providers, and they point out that the values are directly influenced by the proximity of higher education institutions.



**Assetz for Investors** is a company that markets investment opportunities to private landlords in general. It sources both new developments suitable for students and private housing that has been adapted. It sends marketing material to potential investors who purchase either traditional housing or individual student units in purpose designed new blocks. It assists buyers to find finance. Although it mainly operates in the North, its marketing material is of interest because it reveals how some student accommodation is financed. A sample of this is in the appendix 2. Where individual units are sold to individual investors, this could produce future problems if there are changed needs and requirements to alter layout of accommodation or alter the building from student to some other residential use. It is not known whether there are currently developers working to this model in Southwark.

## Why student housing is attractive to developers

**Total returns (%) by asset**



Source: IPD, Knight Frank Residential Research

This chart from Knight Frank shows why developers are interested in student accommodation. The associated commentary said: “it is clear that compared to other property assets, student accommodation has performed strongly over rent years with total annualised returns of 10.2% over five years and 12.2% over three years, a stronger performance than the retail, industrial and residential property sectors. We believe that over the next three years we will see a similar outperformance of this sector.” [source: Bricks & Mortarboards – Student accommodation review 2008, by Knight Frank LLP]

Developers of accommodation for the student market include:

- Unite with the greatest number of bed spaces in the market, 10% in London, provider for Camberwell College of Arts and London College of Communication
- Liberty Living - accommodation in Camberwell
- Opal
- Victoria Hall and
- UPP

Developers attending a recent conference on the provision of specialist student housing were all adamant that it was not economically viable to produce accommodation for low income students, and that their aim was to cater for the higher end of the market.

**Costs to Students - What can students afford?**

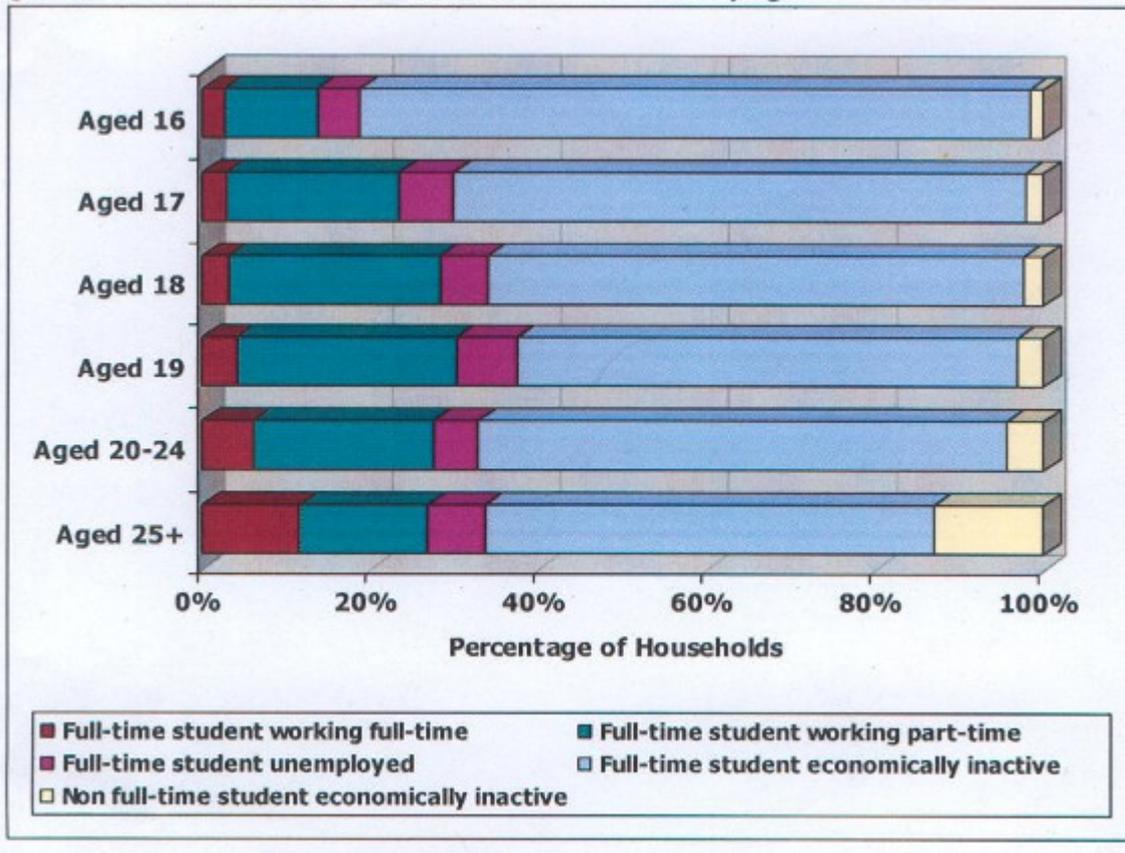
The maximum student loan for living expenses that can be obtained by a student not living at home, but studying in London is £6,475, for those enrolling for 2008-9. [Additional loans are available for course fees.] From this year, those on lower incomes can apply for small grants, but the amount of the grant is deducted from the loan. Because of this many students will take up part-time employment or use other overdrafts or contributions from relatives to get through their college course. This means that UK students whose parents cannot support them cannot normally afford the costs of commercial purpose built accommodation. Universities in areas cheaper than London advertise this fact when trying to attract students. [e.g. Liverpool]

Students commonly run up considerable debts during their studies. It has been reported that a third of students who started university since fees were introduced in 1998 are earning too little to make repayments on their loans. Nearly 400,000 graduates have not made repayments on their loans up to seven years after they graduated because they are not yet earning above the £15,000 threshold.

Source: *ukstudentnews.co.uk* - October 2008,

The GLA study looked at the economic circumstances of students, as reported in the 2001 census.

Figure 3.1: Economic Status of students resident in London by age



It can be seen that older students are more likely to have additional sources of income from employment than younger ones.

**Students and Housing Benefit.** Housing Benefit (HB) rules define full-time students as persons undertaking a full-time course of study including sandwich students. Normally if a claimant is a full-time student they cannot claim HB. There are some exceptions. If the claimant satisfies one or more of the following criteria they may claim HB:

1. Couples or lone parents who are responsible for a child or young person.
2. Disabled.
3. Under 19 following a further (not higher) course.
4. Aged 60 or more
5. Receiving Income Support or Job Seekers Allowance (income based).

The rules also state that those eligible students in halls of residence or other accommodation provided by an educational establishment can now receive housing benefit if they meet the other criteria.

Southwark currently has 175 full-time students in receipt of HB [as at 22<sup>nd</sup> September, 2008]. Of these 62 are in private rented accommodation and 113 are council tenants or RSL tenants. The total value of HB payments to students is estimated at £16,317.80 per week.

Most higher education students, therefore, are not eligible for housing benefit because they do not fall into the categories above.

### Council Tax

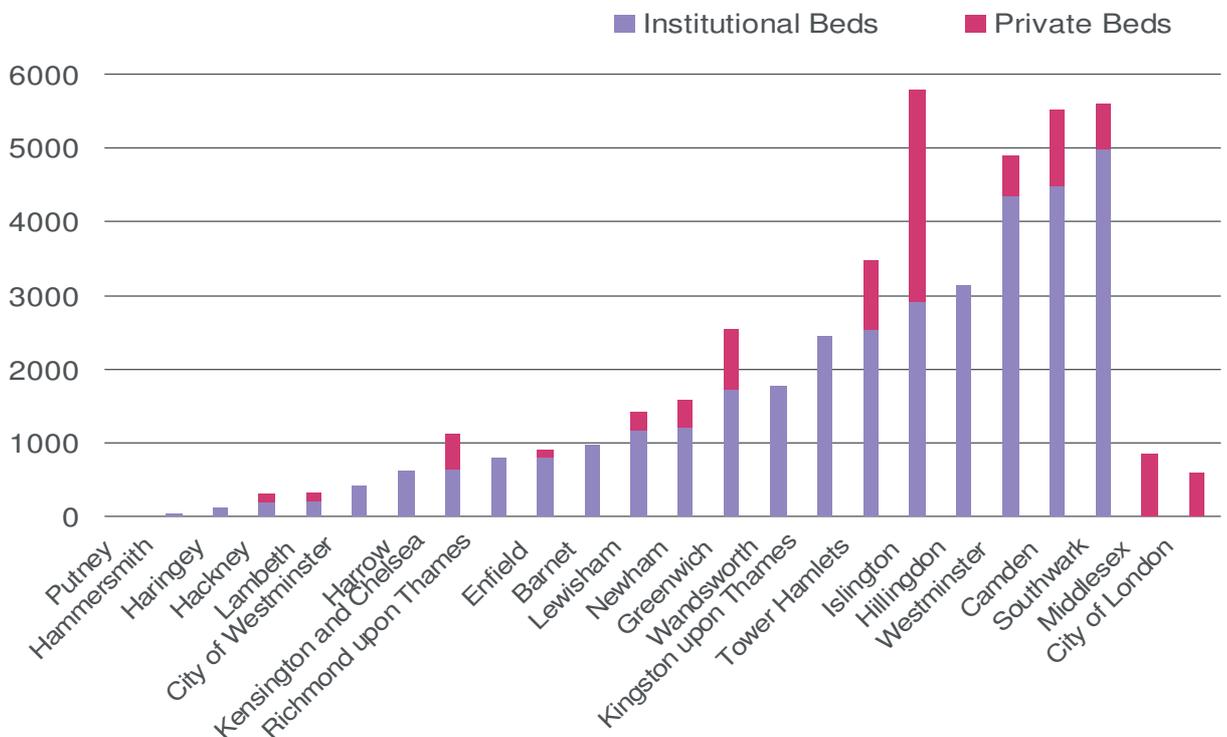
Households wholly occupied by students are exempt from Council Tax. In mixed student/non-student households where there is only one adult who is not a student, then a discount is applied.

## What Student Accommodation is available?

A crucial question is how well provided for are students wishing to reside in Southwark, as compared with other London boroughs. The following two tables give some indication of this.

### Specialist Purpose Built Accommodation

#### Institutional Beds vs. Private Beds by Borough Operational 07/08

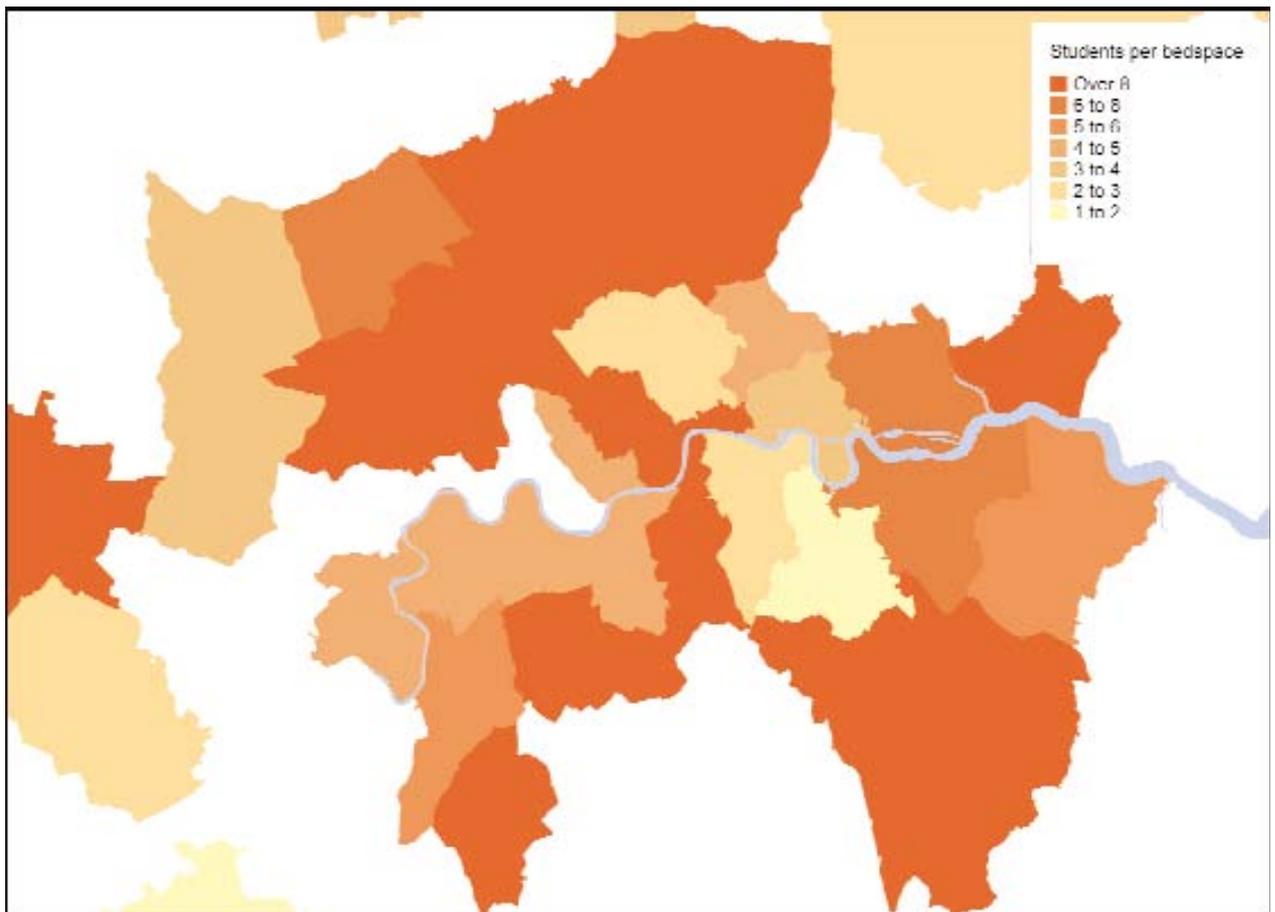


Source: Savills presentation to Student Housing Conference June 2008

The table above looks at the specialist accommodation [both university and private sector] provided in London, by borough, as at 2007-8. It suggests that Southwark is well provided for compared with some other London boroughs, with the highest number of institutional beds- only Islington having more beds in total.

To obtain a more complete picture however, this needs to be compared with potential demand from full time students per available bed. [see below]

### **Full-time students per bed space in London**



*Source of map & text: Savills Research Student housing Report Summer 2007*

Savills Research has developed a student demand model based upon the significant drivers of demand and supply for student accommodation across all local authorities in the UK. This 'hotspot' map shows the number of full-time students per available bed space in a number of London boroughs.

The map indicates that Southwark has 3-4 students per bed-space, meaning that it is well provided for compared to many other boroughs in London. The data combines university owned/managed stock with accommodation provided by the private sector in purpose built halls across the capital. The darkest area of the map identifies local areas where there are eight or more students for every available bed. It is notable that Lambeth, which borders on Southwark, has 6-8 students for every dedicated student bedspace, whereas Lewisham has fewer students per bedspace than Southwark.

### **Private Rented Accommodation**

The institutions who participated in this study are unable to provide data on the number of students who rent accommodation in the private sector as service provision related to the

private rented sector is at a very basic level, in some instances simply providing a list of accommodation agencies. [However Southwark Council Tax Register does give some indication of the numbers of student-only households in the borough. See page 27].

All the institutions interviewed for this study stated that second and third year student housing needs are largely met by the private rented sector. Second and third year and post graduate students still prefer the more informal shared housing environment that this offers.

Anecdotal evidence suggests that the rental growth in this sector continues to increase. South Bank University reports a satisfactory supply of private rented accommodation for students in the locality with a number of investors purchasing property specifically for that purpose.

**Kings College London (Institute of Psychiatry)** has discreet local arrangements with a few local landlords and has also enlisted the support of Kings College Hospital nurse accommodation in extreme circumstances. This is an informal local arrangement.

**South Bank University** maintains a list of accommodation agencies but does not in any way endorse or validate the quality of service or accommodation provided by the agents. Students are encouraged to seek independent advice prior to entering into an agreement.

**University of London Housing Services (ULHS) London College of Communication, Camberwell College of Arts and Goldsmiths University** use the services of the University of London Housing Services Private Housing Unit [see below]. Students are referred to this service for housing advice. This provides a range of housing services to around 40,000 students through its partner universities. ULHS private housing unit works with London landlords and letting agents to secure accommodation for higher education students in London.

ULHS Private Housing Unit has a list of over 4,500 landlords and letting agents who have signed up to its Code of Good Practice. This offers students a degree of security and universities are therefore confident to signpost students to this facility. ULHS also markets private halls of residence. One of their projects includes Liberty Fields Halls, Halsmere Road, Camberwell SE5 in Southwark. Click on link for further information on the residence <http://www.libertyliving.co.uk>.

The University of London Accommodation Service keeps data on private rent lettings that are let through its website, and has mapped London rent levels as follows:

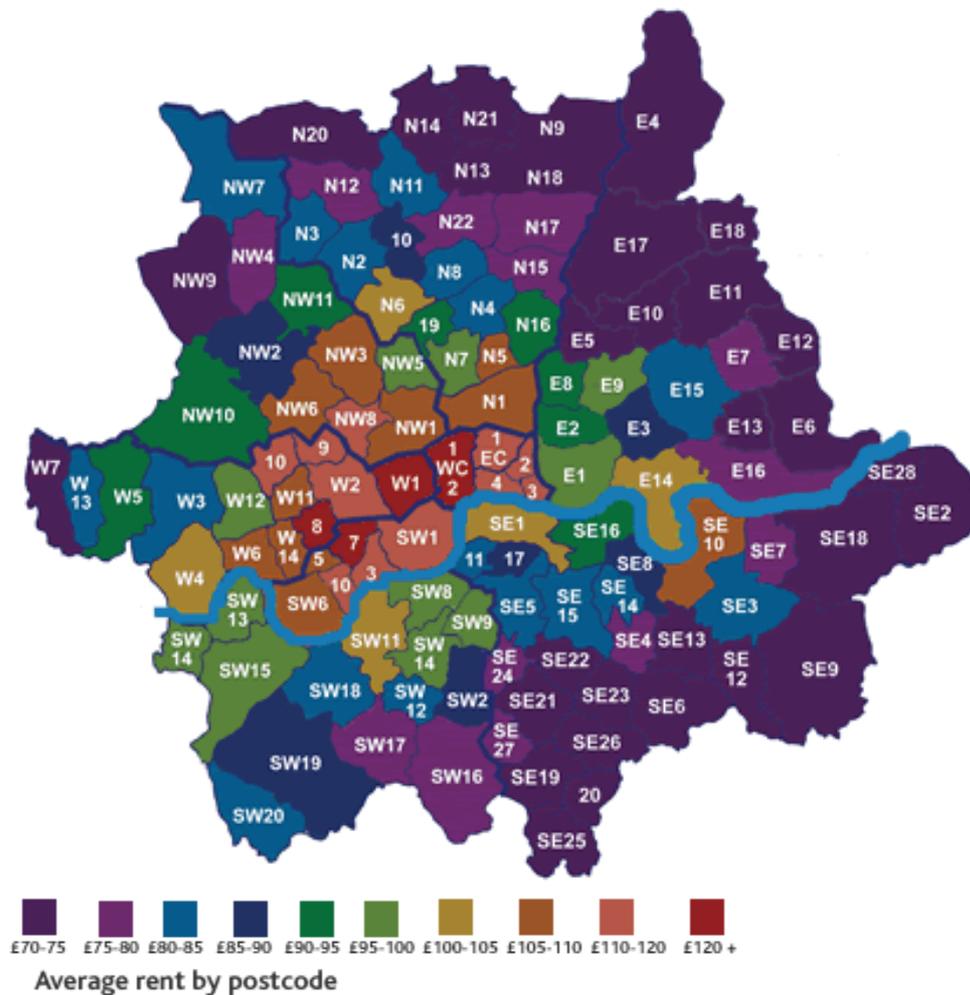
#### **Most Popular Top Ten Postcodes**

1. [NW1](#): Covering Camden and Regents Park
2. [SE1](#): Bermondsey, Borough and London Bridge [**LB Southwark**]
3. [N1](#): Covering Islington and Kings X
4. [WC1](#): Bloomsbury
5. [E1](#): Whitechapel, Tower Hill
6. [N4](#): Finsbury Park, Stroud Green and Green Lanes
7. [E2](#): Bethnal Green and Shoreditch
8. [SE14](#): New Cross
9. [N7](#): Holloway Road/Caledonian Road/Tufnell Park
10. [SE16](#): Surrey Quays/Bermondsey [**LB Southwark**]

#### **Previous Entries in Top Ten**

- [W1](#) West End
- [SE5](#) Camberwell [**LB Southwark**]
- [SE15](#) Peckham/Peckham Rye [**LB Southwark**]

## Postcode map showing rental values



As might be expected, rent levels appear highest in the North of the borough and in inner, rather than outer London.

The internet also provides numerous websites offering students advice and assistance in securing accommodation in the private sector.

## Conclusion

- There is a variety of types of accommodation used by students in Southwark, including studio and cluster flats in specialist student developments to individual and shared private lettings.
- Traditionally, first years, postgraduates and international students all tend to want specialist housing, but second and third year undergraduates tend to prefer to live in shared privately rented homes.
- Southwark currently has more purpose built student accommodation than most other boroughs, both numerically and in relation to the number of students, although this does not necessarily mean that any additional units will not be taken up. Initiatives such as Study London mean that there is likely to be growth in the international market.
- Some types of specialist development are more expensive than others, that is, studios are more expensive than cluster units which have living space shared by several students.
- UK students cannot afford to access specialist housing unless they work and/or receive help from their families, so they are reliant on, and often prefer the private rented sector which is potentially cheaper. This factor also means that UK and London domiciled students are increasingly likely to live at home with their parents during their studies.
- Private rents are higher in the north of the borough

- Private developers see student housing as an untapped commercial opportunity with higher potential for returns than for conventional housing. Most specialist development is aimed at better off students, particularly international ones. Housing for low income students is not considered to be a viable economic proposition by developers.

## Chapter 4 - Provision in Southwark

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### Institutions and locations

Southwark has two universities and a range of other colleges offering higher education courses.

**London South Bank University** is situated in the borough's largest high profile regeneration area, Elephant & Castle, and is within one mile of Westminster. This institution should be a key participant in the regeneration of Elephant & Castle.

**Kings College London**, for the purposes of this research project the Institute of Psychiatry is situated in the south of the borough close to Kings College Hospital. The institute enjoys world wide acclaim and is ranked one of the top 25 universities in the world.

**University of the Arts London** (for the purposes of this study Camberwell College of Arts and the London College of Communication). Camberwell College of Arts is a higher education institution situated in the south of the borough in a locality renowned for its art workshops and studios. The area is diverse and rich in terms of culture, affluence and enterprise. It is within 30 minutes of central London. The Camberwell site was looked at rather than the London College of Communication, but the two institutions are all part of the wider university and share some facilities and halls of residence.

The institutions studied are spread around in the north and south of the borough in Camberwell, Denmark Hill and Borough. They are all established reputable institutions, steeped in history and benefit from notable acclaim.

**Goldsmiths University of London** has been included in the study even though it is located outside Southwark, the justification is that a number of its students reside in Southwark. Goldsmiths is situated in the north of the borough of Lewisham, a vibrant and diverse locality.

The institutions offer their students a range of accommodation in terms of relative affordability, choice, design and location.

### Where Southwark Students are living

The GLA study found that in 2001 most of the Southwark resident students living in communal establishments [such as student halls] were located in Cathedral and Chaucer wards [1,689 & 924 respectively]. They also noted 348 in South Camberwell, 188 in Riverside and 150 in Grange. Only a handful were elsewhere. [see table below]

For those living outside of communal establishments, either alone or in all student-households, the numbers were far more spread out, although Chaucer was still the most popular area, followed by East Walworth and the Grange. [see below] It should be noted that the table is for students aged nineteen or over, so first year students who are still 18 will have been omitted and the actual numbers of full time students in the borough is likely to be slightly higher.

## 2001 Census All students aged 19+ Resident in Southwark

	Living in a household			Living in a Communal Establishment			Total
Ward	Student living Alone	All student group household	Sub-total	Educational Establishment	Other communal establishment	Sub-total	Total
Brunswick Park	60	141	201		3		201
Camberwell Green	115	166	281		29	29	310
Cathedral	71	196	267	1,503	186	1,689	1956
Chaucer	119	401	520	893	31	924	1444
College	35	30	65		3	6	71
East Dulwich	38	110	148				148
East Walworth	87	260	347		3	3	350
Faraday	74	184	258		3		258
Grange	103	218	321	143	8	150	471
Livesey	63	124	187				187
Newington	69	206	275				275
Nunhead	48	155	203			3	206
Peckham	33	124	157				157
Peckham Rye	4 2	8 9	0		9	9	9
Riverside	68	151	219	185		188	407
Rotherhithe	56	212	268				268
South Bermondsey	75	178	253				253
South Camberwell	56	167	223	347		348	571
Surrey Docks	36	194	230				230
The Lane	45	171	216		36	36	252
Village	20	69	89				89
<b>total</b>	<b>1,308</b>	<b>3,547</b>	<b>4,855</b>	<b>3,075</b>	<b>309</b>	<b>3,384</b>	<b>8,239</b>
<b>Students in other household types:</b>							<b>8,956</b>
<b>Total students in Southwark</b>							<b>17,195</b>

Source: GLA Student Housing Requirements Study [2001 Census]

N.B. There are various small errors in the table which have been carried over from the GLA study. Full table is in Appendix 6

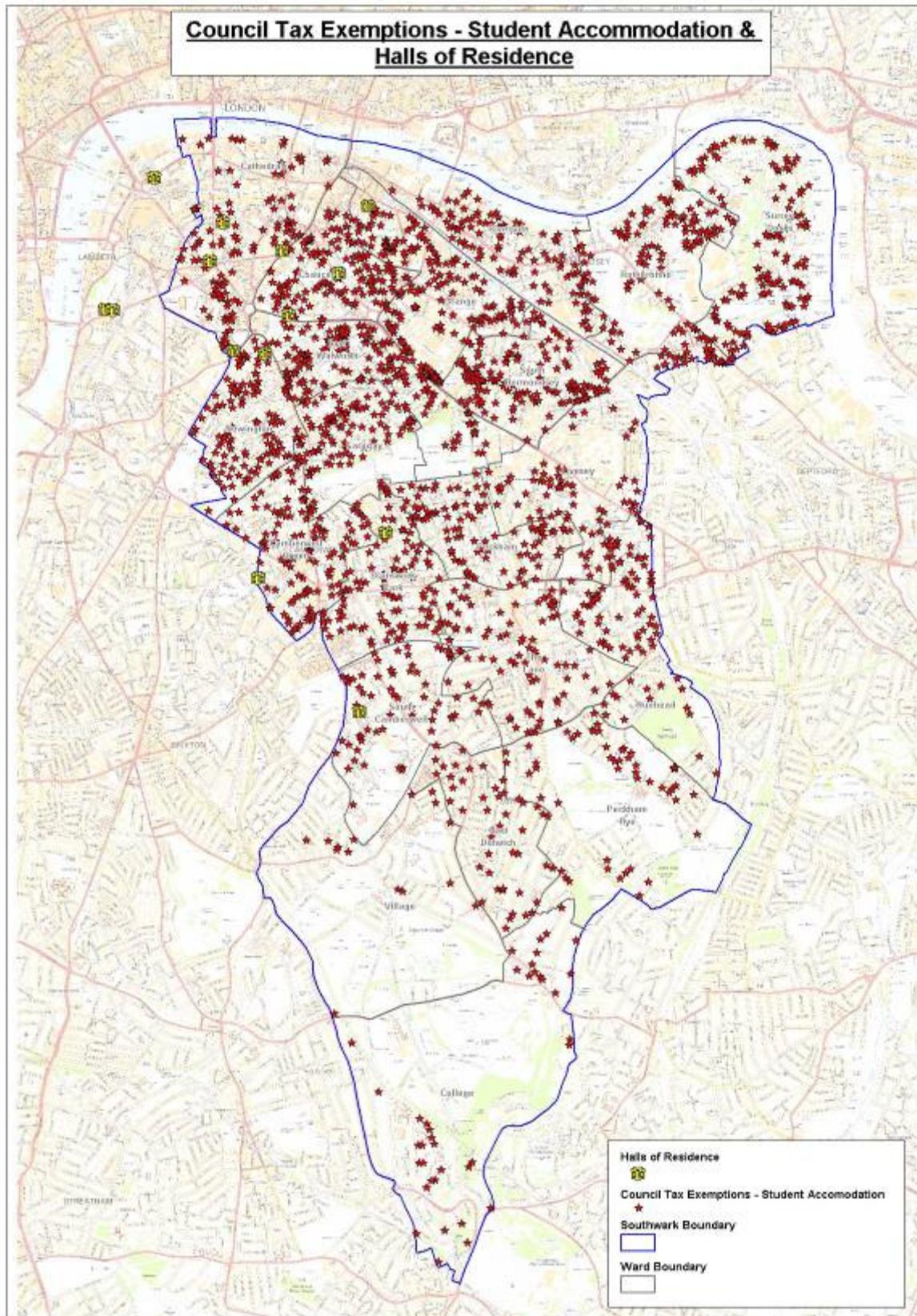
### Council tax exemptions

There are about 2,734 dwellings in Southwark that are exempt from council tax because they are entirely occupied by students. [i.e. in normal self contained accommodation]. Around 2,000 of these are in the private sector and around 734 are council properties.

Information from Southwark's website shows that exemptions are granted on a property that is occupied by full time students and is exempt from council tax payments for as long as the students remain in full time education. An unoccupied property that is left empty by student(s) who are resident elsewhere, during term time is also exempt from council tax. The exemption is indefinite. Evidence of student status, address during term time and corroboration from education establishment is required.

In addition, there are about twenty addresses with exemption because the occupant is away studying outside Southwark.

The following map shows the location of properties where there is a council tax exemption due to the property being fully occupied by students [December 2007]. It can be seen that numbers are more concentrated toward the north of the borough. The map also shows the location of known halls of residence.



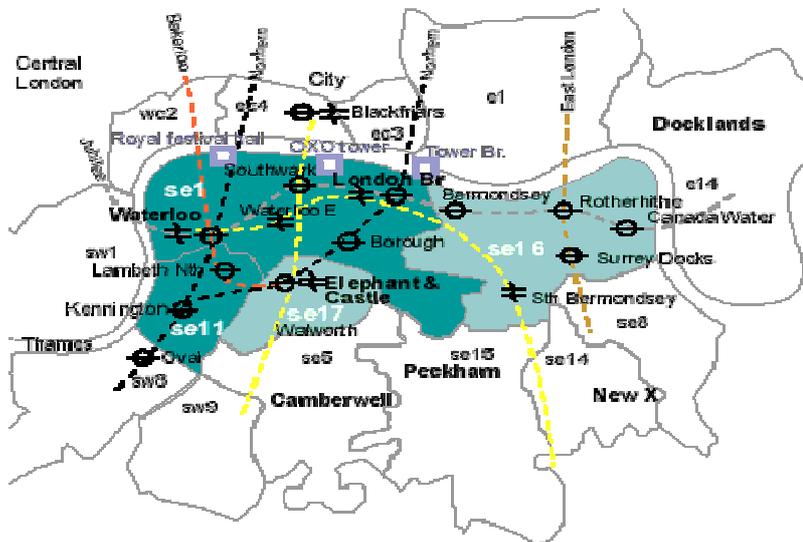
## Private Lettings

The higher education institutions which participated in this study, with the exception of South Bank University, are all members of the University of London, a federation of 19 self governing colleges and 9 institutions. University of London provides a range of services to its members including co-ordination of accommodation for students seeking accommodation in the private rented sector.

As student numbers rise each year universities lack the resources to respond to extra needs for accommodation. Consequently, the private sector absorbs the surplus.

The higher education institutions researched have minimal contact with the private rented sector. Kings College London (Institute of Psychiatry) has arrangements with a few local landlords. South Bank maintains a list of accommodation agencies but does not in any way endorse or validate the quality of service or accommodation provided by the agents. Students are encouraged to seek independent advice prior to entering into an agreement.

Below is a map of the South Bank area, highlighting colour coded rental value indication, desirability of location and therefore price.



Accommodation type & location	Average rent pw / pcm
Double room – Elephant & Castle SE17	£380 - £455 pcm
Double room – Bermondsey SE1 / SE16	£155 pw
Single room – Camberwell SE5	£295 pcm
Single room – Peckham SE15	£350 pcm

[source: ULHS – South East London Letting Agents website]

## Economics of provision

The GLA Higher Education Review, 2002, found that the further and higher education sectors together produced five percent of London's Gross Domestic Product.

According to the 2004/5 Student Income and Expenditure Survey [department of further education and science], UK domiciled students living in London spent, on average:

£6,542	on living expenses, such as food, entertainment, clothes etc;
£2,455	on housing costs
£2,235	on participation costs, such as tuition fees, books, printing etc
£158	on children [low because a fairly low percentage of students have children]
£11,390	in total

It can be seen, therefore, that students have the ability to contribute a substantial amount to the local economy.

It is also worth noting that this expenditure is way above the level of the student loan.

## Studying & Living in Southwark

The student experience in this report is based on discussions with accommodation managers in higher education institutions in Southwark. The commentary is based on managers' day to day contact with students and their observations on how student life, culture, aspirations and experiences have developed over time.

It was clear that the institutions in Southwark have a propensity to attract polarised distinct student types; consequently the student experience can vary considerably from institution to institution.

South Bank University reports that student are typically home grown, indigenous to Southwark and wider London. This therefore means that accommodation is not generally a main concern. The University is centrally located and well served by transport networks and therefore a reasonable commute from most areas in London. It was formerly a polytechnic and has a tendency to attract students from a working class background, although the student population is fairly mixed in terms of affluence, class and ethnicity.

In contrast, this research found that Kings College London (Institution of Psychiatry) attracts a more diverse student type in terms of affluence, culture and class. Associated with this are more complex expectations and aspirations.

Camberwell College of Arts (one of 5 colleges forming the University of Arts London), like Kings, attracts a diverse and eclectic student type. This college purports to have the largest creative network in the world. The five-strong group of colleges has official overseas representatives in a number of countries worldwide including Brazil, China, India, Hong Kong SAR, Canada, USA and Thailand. These colleges have a distinct unique creative background and therefore attract assorted student types.

Goldsmiths University characteristics appear to be similar to both Kings College London (Institution of Psychiatry) and South Bank University. It too attracts local people, however, its international status means that it also attracts a diverse student type.

Institutions in Southwark offer a wide range of courses attracting an eclectic group of students with wide ranging needs, aspirations and expectations in relation to academic attainment, social opportunities and independence.

In spite of the differences there are commonalities amongst the student types in all of the institutions studied: Students in Southwark spend their time in a conventional way, attending lectures, research, part-time work and socialising. Socialising (a key aspect of student life) in the university campus area is evident in areas such as London Bridge, Borough and Camberwell where there are thriving student communities. This is reflected typically by the

number of eateries and bars in the localities. South Bank University reports that the student community in Elephant & Castle area makes an important contribution to the local economy retail sector. The institution also reports that by and large students see themselves as a part of the local community.

The research suggests that students generally find Southwark a reasonable place to live and study because of its excellent transport networks, relatively affordable housing, its diverse communities and reputation for social life.

There are also students who live in Southwark in halls and private rented accommodation whilst studying at other London colleges, for the reasons described.

The institutions, both within and outside Southwark, report that students are generally satisfied with the accommodation and facilities provided by the universities. All residences have access to the internet either in individual rooms or communal areas.

All of the institutions interviewed report that more often than not, first year students reside in halls and therefore generally have high satisfaction levels relating to accommodation. Generally, first year students are settled and do not move about during their first year of study. Any accommodation issues resulting in change are likely to be a result of extenuating personal circumstances.

Good quality affordable housing and high levels of satisfaction on the other hand for second and third year students in Southwark is more difficult to measure as the universities have little or no control over the type of accommodation the student occupies. These students enjoy more choice, autonomy, freedom, as well as less rules and regulations.

Second and third- year students tend to live in HMOs. The problems many of these students encounter can include:

- Poor quality, in particular disrepair
- Lack of cleanliness
- Too expensive
- Too far from campus
- Too cramped
- Limited choice in terms of affordability and type

Both student and universities cite choice in accommodation types for second and third year students and post-graduates as a gap in the student housing market.

Anecdotal evidence suggests that some students are choosing to stay in their study localities after graduation. A key obvious benefit to the community is retaining skilled and professional workforce with relevant expertise for local community business which inevitably supports the local economy and sustainable communities.

### **Studentification**

Some other areas [e.g. Loughborough or Belfast] have reported problems of 'studentification' with large numbers of students being present in private rented dwellings in term time and the same areas being empty in holiday periods. There is no particular reason to suppose that this has happened to any major extent in Southwark up to now, although it might be wise to have regard to this issue when planning further developments. Receptiveness of local communities to increased numbers of students is a real consideration, but this could happen equally by additional student households moving into the private rented sector than by new halls of residence developments. This has been extensively discussed in a recent publication by the Department of Communities & Local Government - [*Evidence Gathering – Houses in Multiple Occupation and possible planning responses*], which looks at issues concerning HMOs in general and as they are affected by students and migrant workers in particular. A brief outline of this document and the Government response to it is in Appendix 3.

## **Current Provision in Southwark**

Research undertaken for this project suggests that Southwark appears to be reasonably well catered for in terms of accommodation provision. This is a crude measure including incorporating the various housing types, halls of residence, private rented sector and commercial halls. Although there is a lack of robust data to, the feedback from the all the institutions is that students find a place to live. There were no reports of students being homeless.

The institutions do not record this kind of information on their student v accommodation ratios, and it is impossible to effectively interrogate the private rented sector to collate and analyse data relating to accommodation that students occupy in the sector. Savills, however, have attempted to assess this ratio with regards to specialist student accommodation. [see page 23, chapter 3 for map]

In the main, higher education institutions in Southwark have maintained the conventional model of developing and managing their own student accommodation. All the institutions interviewed with the exception of Camberwell College of Arts have campus-based halls of residence.

The institutions provide a variety of residences in diverse localities across the borough. There are approximately 4,256 units of purpose built student accommodation in Southwark (excluding Goldsmiths). The units comprise a mix of intercollegiate halls, cluster flats and self contained units. The residences are mainly purpose built cluster flats or apartments with ensuite, shared facilities and communal areas. All the institutions provide internet access, ranging from direct room access to wireless connections in communal areas.

All residences are well served by transport networks and are all within an hour of central London, including Goldsmiths.

Some residences are staffed by resident managers and or supported by staff during office hours or by appointed senior students (usually post graduate).

The University of the Arts (Camberwell College of Arts) has rooms that have been adapted for students with disabilities. These rooms are suitable for wheelchair access, and some have interactive adaptations in the bedrooms, bathrooms and kitchens as an integral part of the alarm system. Other institutions report that they have some rooms that can be used by students with disabilities although they have not been specifically designed for this.

The typical weekly cost in Southwark for single shared facilities halls of residence accommodation is £90 per week, cheaper than other areas in London. Universities contacted say that students generally accept market rents and by and large find accommodation both affordable and good value for money. This may be a result of the limited choice in accommodation available.

## **Summary of the current local provision**

On the following pages there is an account of the institutions contacted for this study.

## London South Bank University (LSBU)



### **Profile**

LSBU has been a part of Southwark's local history and landscape for over a century. It started its life as a polytechnic providing vocational education. In June 1992 it was awarded university status by the Privy Council. It is one of London's oldest higher education establishments.

Positioned south of the River Thames, LSBU marks the one-mile point from Westminster, is just one minute walk from Elephant & Castle Underground station, centrally located near Waterloo and London Bridge, and is well served by transport networks.



South Bank University has four faculties; Arts & Human Sciences. Business, Computing & Information Management, Engineering, Science & the Built Environment.

LSBU has over 23,000 students, of which over 3,000 are international students.

LSBU is in the heart of the Elephant & Castle regeneration area.

<b>Element</b>	<b>Information</b>
<b>Units</b>	<ul style="list-style-type: none"> <li>• 1400 single study bedrooms</li> <li>• Located across 4 residences (David Bomberg Hse Borough, Dante Rd, Kennington, McLaren Hse St Georges Circus, &amp; New Kent Road, Holy Oaks), all within 10 minutes of main campus</li> <li>• Flats accommodating between 2&amp; 9 residents depending upon building</li> <li>• Internet access in 90% of rooms</li> <li>• Managed by South Bank</li> </ul>
<b>Unit types</b>	<ul style="list-style-type: none"> <li>• Halls</li> <li>• Ensuite &amp; shared facilities</li> <li>• Adapted units available for students with disabilities</li> </ul>
<b>Cost</b>	<p>Prices are based on calculation for 08/09 and includes all amenities</p> <ul style="list-style-type: none"> <li>• Ensuite £106pw</li> <li>• Standard £88pw (shared facilities)</li> </ul>

<b>Allocation policy</b>	<ul style="list-style-type: none"> <li>• Broad policy, reviewed annually to respond to change</li> <li>• All first year international students guaranteed a place if application received by 1<sup>st</sup> August</li> <li>• Priority to 1<sup>st</sup> year students</li> <li>• Waiting list maintained, average 60/70 on list. Waiting list manageable</li> </ul>
<b>Letting period</b>	<ul style="list-style-type: none"> <li>• Maximum of 40 weeks</li> </ul>
<b>Stock condition</b>	<ul style="list-style-type: none"> <li>• good quality, mainly new developments</li> </ul>
<b>Student Profile</b>	<ul style="list-style-type: none"> <li>• 18 - 24 years</li> <li>• Lower income students</li> <li>• Diverse community, reflective of community</li> <li>• Local residents</li> <li>• No significant change in student numbers</li> <li>• Notable real growth in international market</li> </ul>
<b>Development plan</b>	<ul style="list-style-type: none"> <li>• Undertaking review of partnerships, outcome will influence future relationships</li> <li>• Key objective, to increase international student population</li> <li>• 60% of students applying for accommodation are international students</li> </ul>
<b>Private rented sector</b>	<ul style="list-style-type: none"> <li>• Area flooded with accommodation. From the private rented sector</li> <li>• Many speculative landlords, offering 1 &amp; 2 bed units and developments</li> </ul>
<b>Specific issues</b>	<ul style="list-style-type: none"> <li>• LSBU has a unique history (polytechnic), therefore attracts London based students, typically housing is not an issue</li> <li>• Has no significant growth in its student population and anticipates a decline in 18 year old entering higher education by 2010- 2011 (census analysis)</li> <li>• Strategic plan – emphasis on increasing international students population, review of development plans</li> <li>• Perception of insufficient / unmet demand for student accommodation is not typical for LSBU.</li> <li>• LSBU have acted as mediators between students and families in the area, owing to a difference in lifestyle. More of an issues in mixed tenure blocks</li> <li>• Mindful of an increase in student accommodation in the area, concerns around creating an imbalance that affects local economy and sustainability of the area. Would not like to see vicinity become a centre for student accommodation</li> </ul>

It is the view of South Bank University that there is adequate accommodation to meet student demand for student housing in the locality. The university states that there is sufficient accommodation in the private sector to absorb any surplus that the university cannot accommodate.

South Bank expressed concerns on the studentification (even though it is not an immediate problem) of the area if specialist accommodation is developed in the locality. It is the university view that due consideration should be given to creating balanced communities. Of all the institutions interviewed South Bank is the only university with this opinion.

## Camberwell Arts College (part of University of the Arts London, along with London College of Communication)



Camberwell Arts College is one of the world's leading art and design institutions. It has received students to Southwark for over a century, many of whom stayed on, making Camberwell a place for artists to live and work.

Camberwell Arts College is located at two sites, with a main centre on Peckham Road, SE15 and the other on Wilson Road, SE5. The college is well served by buses and trains that go to the heart of London within 30 minutes.



Camberwell Arts College has a unique feature in that accommodation is not campus based. It extends from Chelsea, to Oxford Street to Camberwell. Accommodation is clustered, typically small independent houses to traditional halls of residence.

London College of Communication is also part of the University of the Arts, and is located in Southwark, but it was not specifically considered as part of this study. Camberwell College of arts was selected on the basis that it is centrally located in the borough.

Element	Information
Units	<ul style="list-style-type: none"> <li>• 718 single study units</li> <li>• 4 residences in Southwark;</li> <li>• Bernard Myers Hse, SE5 (owned &amp; managed by Unite)</li> <li>• Julian Markham Hse SE17 (owned &amp; managed by Unite)</li> <li>• Manna Ash Hse, SE1 (owned &amp; managed by Shaftesbury Student Housing)</li> <li>• Brooke Hall, SE5 (owned &amp; managed by arts college)</li> <li>• Typically self contained, cluster flats with five or six bedrooms each</li> <li>• Internet access</li> </ul>
Unit types	<ul style="list-style-type: none"> <li>• Several residences are suitable for wheelchair with additional adaptations in the bedroom, bathroom &amp; kitchen</li> <li>• Most units have private shower rooms, the exception is Brooke Hall facilities are shared between five.</li> </ul>
Cost	<ul style="list-style-type: none"> <li>• £95.55pw Brooke Hall</li> <li>• From £117.60pw to £166.60pw</li> </ul>
Allocation policy	<ul style="list-style-type: none"> <li>• Annual review of policy to ensure meets current needs</li> <li>• Special needs</li> <li>• Under 18's</li> <li>• Distance from home to London</li> <li>• 1<sup>st</sup> year students</li> <li>• No waiting list operated</li> </ul>
Letting period	<ul style="list-style-type: none"> <li>• 42 or 51 weeks varies according to landlords agreement</li> </ul>

<b>Stock condition</b>	<ul style="list-style-type: none"> <li>• 3 residences, all privately owned built since 2000, excellent condition</li> <li>• Brooke Hall built 1960, owned by arts college in poor condition in need of modernisation</li> </ul>
<b>Student profile</b>	<ul style="list-style-type: none"> <li>• Typically 18 -22 years</li> <li>• Total number of students 3,500 of which 1,754 are 1<sup>st</sup> year students</li> <li>• Mature students – post graduate courses</li> <li>• No information on demographics or socio-economic status</li> <li>• Notable growth in international student population and expected to increase</li> </ul>
<b>Development plan</b>	<ul style="list-style-type: none"> <li>• over the next five years, 700 new units, some family units all ensuite</li> <li>• future development plans, targeted growth to circa 4000 by 2010/2011</li> <li>• existing partnerships with residential developers Unite, Opal, Sanctuary Housing</li> </ul>
<b>Private Rented Sector</b>	<ul style="list-style-type: none"> <li>• Links to University of London Housing Services (private rented sector)</li> </ul>
<b>Specific issues</b>	<ul style="list-style-type: none"> <li>• Frequent contact with speculative developers</li> <li>• Mediation partnerships to manage relationships between university and developers King Sturge and Savills</li> <li>• Supply of student accommodation across London and in Southwark altogether inadequate. A large amount of student housing need is met by the private rented sector, in particular for 2<sup>nd</sup>, 3rd year and post graduate students.</li> <li>• Affordability does not appear to be an issue, students generally expect to and can afford to pay market rents</li> </ul>

Like most of the institutions interviewed, Camberwell Arts College believes that demand for student accommodation will always outweigh supply. It is the college experience that there is insufficient student accommodation across London. One of its blocks is in poor condition and in need of renovation.

Camberwell Arts College reports that it has been approached by commercial developers concerning future development of student accommodation. It is the view of the college that the relationship between institution and investor would be more productive with the involvement of a mediator.

The college reports that any shortage of accommodation in terms of student halls is absorbed by the private sector.

## Kings College London



Kings College is one of England's oldest and most prestigious universities and is based in the heart of London. Kings College London has nine Schools of Study, providing a broad range of study; Biomedical & Health Sciences; the Dental Institute; Humanities; Law; Medicine; the Florence Nightingale School of Nursing & Midwifery; Physical Sciences & Engineering; the Institute of Psychiatry, and Social Science & Public Policy.

Kings has 19,700 students of whom 6,200 are post graduates. It celebrates world wide success and is ranked one of the top 25 universities in the world.

For the purpose of this research project, the Institute of Psychiatry was consulted on the sufficiency of student accommodation as it is situated in Camberwell, in the south of the borough.

Focus	Information
	<ul style="list-style-type: none"> <li>Mixed accommodation of single &amp; double units, shared &amp; self contained</li> </ul>
<b>Unit types</b>	<p>Halls of Residence</p> <ul style="list-style-type: none"> <li>Brain Creamer Hse, SE1,- provides 69 single bedrooms</li> <li>Kings College Hall, SE5 - offers 456 single bedrooms and some shared accommodation suitable for couples</li> <li>Wolfson Hse, SE1 – provides accommodation for up to 268. number of single rooms grouped in cluster flats for 268 residents (there are 11 flat for couples)</li> <li>The Rectory SE1 - accommodating 24 single students and two twin rooms for couples</li> </ul> <p>Apartments</p> <ul style="list-style-type: none"> <li>Great Dover street SE1 – provides 113 apartments accommodating 769 students in single bedrooms</li> <li>Stamford St SE1 – 89 self catering apartments providing 548 single bedroom and two suitable for couples</li> <li>The above apartments are managed by Kings College London</li> </ul>
<b>Cost</b>	<ul style="list-style-type: none"> <li>£3,948 - £4,768 per annum – single units</li> <li>£5,784 - £6,622 per annum – couple units</li> </ul>
<b>Allocation policy</b>	<ul style="list-style-type: none"> <li>Priority for places in residence 1<sup>st</sup> year intending undergraduate students with no permanent home address inside the M25</li> <li>Quota of places in the residences is allocated to postgraduate students. Priority to intending overseas applicants who have not lived or studied in the UK before and to applicants with exceptional housing needs</li> <li>As far as possible, the College attempts to accommodate students with disabilities in suitable residences</li> <li>Quota of places allocated to returning students. Priority to those entering their final year of undergraduate study having not previously spent a year in residence</li> <li>Waiting list maintained – mid session relinquishment creates vacancies</li> </ul>

<b>Letting period</b>	<ul style="list-style-type: none"> <li>• 40 weeks</li> </ul>
<b>Stock condition</b>	<ul style="list-style-type: none"> <li>• Good</li> <li>• Internet access in bedrooms &amp; common area</li> <li>• Facilities at teaching campuses include gyms, swimming pools and sports ground(a membership fee is charged)</li> </ul>
<b>Student profile</b>	<ul style="list-style-type: none"> <li>• There are approximately 2,138 students in the above college residences</li> </ul> <p>Typical student age range 18 -29 years</p> <ul style="list-style-type: none"> <li>• diverse in terms of ethnicity &amp; economic status</li> <li>• some overseas students</li> </ul>
<b>Development</b>	<ul style="list-style-type: none"> <li>• In final stages of £5 million redevelopment plan of it's estate</li> <li>• Recent projects in this development programme, includes £30 million James Black Centre at King's Denmark Hill Campus, and the £40 million redevelopment of the south range of the main or King's building at the Strand Campus,</li> </ul>
<b>Private Rented Sector</b>	<ul style="list-style-type: none"> <li>• Heavy reliance on the private rented sector</li> <li>• University of London Housing Services-private housing unit &amp; local knowledge of landlords with rooms to let in the locality</li> </ul>
<b>Specific issues</b>	<ul style="list-style-type: none"> <li>• Inadequate supply of student accommodation across the spectrum</li> <li>• Demand outweighs supply</li> <li>• Significant number of international students, a likely result of the subjects of study and international acclaim. Anticipated growth in this student population</li> <li>• Demand for family /couple accommodation difficult to measure, marketing strategy may deter couples / families</li> <li>• Hidden demand - established internal informal arrangement with Kings College Hospital, who occasionally offer student nurse accommodation to Institute of Psychiatry students – severe oversubscription or acute student circumstances</li> </ul>
<b>Further Information</b>	<ul style="list-style-type: none"> <li>• <a href="http://www.kcl.ac.uk">http://www.kcl.ac.uk</a></li> </ul>

Institute of Psychiatry (IoP) faculty reports insufficient student accommodation both in the locality and in the wider London area, consequently the private rented sector provides much needed accommodation.

The Institute of Psychiatry does not report any notable demand for couple or family accommodation. It is of the view that advertising of student accommodation is likely to deter couples and families and it is therefore difficult to gauge true demand. Notwithstanding, it is the view that there is likely to be need for this type of student accommodation.

The Institute observes that there are high student expectations in terms of the facilities.

## Goldsmiths University



Goldsmith University is in the borough of Lewisham, located in the north of the borough in New Cross. Goldsmiths has over 8,000 under graduate and post graduate students.

Goldsmiths' teaching and administration, and most of its residential accommodation, is located on a single campus.

Goldsmiths benefits the local community not only educationally, but also economically. Goldsmiths is a major employer in the area, and an important partner in regeneration. The College's wealth of expertise and collective knowledge is made available to business and the community through contract research and consultancy services, training and development and business networking.

It's an ideal low cost base for studying and socialising, travel card zone 2 with Central London just 15 minutes away by train. New Cross has excellent public transport links, bus, train and Docklands Light Railway [DLR].

Although Goldsmiths is located outside of Southwark's borough boundaries, it was included in the research project because of its close proximity to Southwark and the fact that many of its students live in Southwark and therefore form an integral part of our student community.

Focus	Information
<a href="http://www.goldsmith.ac.uk">http://www.goldsmith.ac.uk</a>	Goldsmiths has around 850 units split across 6 sites. All clustered in the north of the borough of Lewisham, within 20 minute walk of main campus
<b>Unit type</b>	<ul style="list-style-type: none"> <li>•Loring Hall –400 bed spaces all ensuite.</li> <li>• Chesterman Hse –100 bed spaces, all ensuite</li> <li>• Dean Hse – 100 bed spaces , all ensuite</li> <li>• Batavia Mews – 110 bedspaces. standard units</li> <li>• Surrey Hse – mix of standard &amp; ensuite</li> <li>• Raymount Hall 135 bedspaces. All ensuite,</li> <li>•2 adapted units for students with disabilities</li> <li>•Managed by Goldsmiths University</li> </ul> None of the above residences are situated in

	Southwark
<b>Cost</b>	<ul style="list-style-type: none"> <li>• ensuite £103-£113 per wk</li> <li>• Standard £85 – £89 per week (shared facilities)</li> </ul>
<b>Allocation policy</b>	<ul style="list-style-type: none"> <li>• Annual review to respond to fluctuating demands</li> <li>• PGCE students prioritised for housing</li> <li>• Generally 1<sup>st</sup> year students are the highest priority for allocation on campus</li> <li>• Outside London, zone 6 and A-D on the tube</li> <li>• 10% of halls places allocated to returning students, priority in this category to final year students and outside of London</li> <li>• All international students are allocated conditionally on meeting the deadline</li> </ul>
<b>Letting period</b>	<ul style="list-style-type: none"> <li>• Under graduate 39 weeks</li> <li>• Post graduate 50 weeks</li> <li>• Flexible arrangements for international students</li> </ul>
<b>Stock condition</b>	<ul style="list-style-type: none"> <li>• 5 sites developed over the last 10 years</li> <li>• All decent standard</li> <li>• All units have internet access &amp; some communal areas</li> </ul>
<b>Student profile</b>	<ul style="list-style-type: none"> <li>• 18 – 25 years</li> <li>• 25 + post graduate</li> </ul>
<b>Development plans</b>	<ul style="list-style-type: none"> <li>• Development opportunity – disused site in Lewisham, discussions still embryonic</li> </ul>
<b>Private Rented Sector</b>	<ul style="list-style-type: none"> <li>• PRS arrangements through University of London Housing Services – Private Housing Unit <a href="http://www.housing.lon.asc.uk">http://www.housing.lon.asc.uk</a></li> </ul>
<b>Specific issues</b>	<ul style="list-style-type: none"> <li>• Development of family type units</li> <li>• Student accommodation design standards should consider diversity, disability, unit needs – family, carer etc</li> </ul>

Goldsmiths is also of the view that there is insufficient student accommodation in the locality and across London. It is not located in Southwark, but is close to it, and has students who live in private rented accommodation in Southwark.

Goldsmiths thinks there may be hidden demand for couple or family type accommodation and further investigation of the demand for this type of accommodation will provide a useful insight. In addition, Goldsmiths' view is that future design of student accommodation should take into account the increase in diverse needs, i.e. units that accommodate carers, family units, units designed for students with complex disabilities.

## Chapter Conclusions

- Three out of the four institutions visited felt that there is a need for additional specialist accommodation, halls of residence, cluster flats and self contained apartments for students. It was felt that there was a lack of choice of accommodation types for second and third year students and postgraduates. This is a key driver for developing more student housing.
- There was also some feeling that there are types of students who are not adequately catered for, possibly couples and families and students with particular needs.
- One institution mentioned the desire for a mediator to assist them in dealing with potential developers.
- The institutions in Southwark provide around 4,252 bedspaces [an increase of over 1,000 since the 2001 Census]. This provision consists of halls of residence, cluster flats and self contained apartments. The 2001 Census suggested that there were around 8,956 students resident in other types of accommodation in Southwark, such as with families [2,800] and in other mixed households [6,156], plus 309 living in unspecified 'other communal establishments' [possibly private halls]. This figure is out of date, but the Southwark Council Tax register for 2007 indicated around 2,734 student *households* in other accommodation, containing an unspecified number of individual students.
- This study did not look in any detail at stock condition; however, all described the general stock condition as good quality, in one instance excellent. However, Camberwell College of Arts reported that one of its halls, Brooke Hall (owned and managed by the college) built in 1960 is in poor condition and in need of modernisation.
- Large numbers of Southwark students live in the private rented sector. Many of them may prefer this, but if more specialist accommodation were provided it is likely to be filled easily. Students living in the sector study at both Southwark based institutions and others, such as Goldsmith's, which are located in neighbouring areas.
- Universities have noted an increase in accommodation developed and managed by the commercial sector although they currently represent only a small proportion of the student market. This is likely to grow as the market expands.
- Some universities have entered into PFI- style partnerships with commercial developers, others (South Bank) have recognised they need to generate funds from residences and have adopted pricing strategies that reflect the relative quality of the accommodation.
- The sector seems to be going through a new stage of development, university led through strategic plans to develop new accommodation, as well as refurbishment of existing stock. In addition, institutions aim to provide a variety of accommodation to respond to the steady growth in overseas students and secure the institution's long term viability.
- There has been steady growth in the overseas student population and institutions are seeking maximum benefit from this. London is particularly attractive to these students. This trend has influenced the type and profile of any additional student accommodation required.
- International students seek good quality accommodation, are more affluent and therefore capable of paying higher premiums.
- Overseas students bring cultural diversity to a university. They also bring much needed fees and are increasingly becoming an important revenue stream.
- Housing is emerging as one of the main influencers and drivers in student decision making. It is becoming as important to both students and parents as the perception is that 'managed' accommodation, i.e. student halls, offer safety, stability, accountability in terms of landlord responsibilities, as a result parents are willingly to pay for it.

- The following table show numbers of students places on campuses in Southwark. However these universities have campuses at a number of sites throughout London, so this is not indicative of how many students are actually studying in the borough. Figures on how many are based in Southwark are not produced. Of the universities mentioned, only London Southbank University is entirely based in Southwark. Goldsmiths is in Lewisham, near the border with Southwark; Kings is London wide, but has one institute in the borough and the University of Arts London has two of its five colleges in Southwark.

#### Higher Education Students 2006-7

Institution	Total Students	of which:	in higher education	full time post graduate	full time undergraduate	total full time
Goldsmiths	7620		7450	1685	4015	5700
Kings College	21230		21230	3770	11545	15315
University of Arts London	30885		14910	1600	11785	13385
London South Bank University	23215		21770	2060	8985	11045
Total:	82950		65360	9115	36330	45445

Source: HESA

## Chapter 5 - Summary and conclusions

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### Summary

This study has identified some of the main challenges faced when seeking to explore and or develop the student housing sector. Student housing has not in the past been identified as a priority by councils.

The student housing market is a complex one. However, it is entering an innovative phase in the commercial sector with universities recognising the need to develop a more strategic approach to meeting student needs.

Government policy is aimed at an expansion of higher education through an increase in the participation rate of young people. In addition there is an indication that the Government wants to attract more international students.

Regionally there has been the 'Study London' campaign to attract young people from abroad to study in London. To complement this, higher education institutions themselves are working to attract students from abroad, and have offices in other countries where there is likely demand. This is the case, for example, with the University of the Arts London, which has two colleges in Southwark and a number of overseas offices.

Over the last few years the number of higher education students has been steadily increasing, this being especially the case with students from overseas. Overseas students bring both cultural diversity and increased revenue to universities. As regards UK students, increased tuition fees do not appear to have reduced numbers of students entering higher education up until now.

These factors point towards an increasing number of higher education students in the future and a consequent increased need for student accommodation. However, this is at least partly tempered by the forecast decline in the number of young people in the appropriate age groups. There is also the possibility of an increasing proportion of UK students electing to study in their own home towns and remaining living with their families.

Students can be accommodated in a number of ways. Older students often already have their own accommodation, in a variety of tenures. This is less often the case for younger ones. Higher education institutions often aim to accommodate new students in purpose built accommodation for at least their first year. The private rented sector has always accommodated a large proportion of students, and it has taken up the slack in recent years when student numbers have increased.

Southwark has several large higher education institutions located within its boundary, and others in close proximity. There are already large numbers of students living in the borough, in both purpose built and ordinary accommodation. There are a number of university and private halls of residence, although all are currently managed in conjunction with the institutions. Southwark is well provided for in terms of specialist beds per student, and has more purpose built beds than all other London boroughs. However, students from other areas and institutions, such as central London, or Goldsmiths, also live in Southwark.

Of the higher education institutions interviewed, all but one reported an existing need for more accommodation. This does not mean that there are students who are homeless, because most find accommodation in one way or another, but there is a clear demand for more specialist accommodation. They said that demand continues to outstrip supply with an ongoing shortage of affordable good quality student dwellings.

The market has changed and there are a number of large companies who provide student accommodation, either privately or in conjunction with universities. The student accommodation market is an emerging profitable sector which is seen by developers as a lucrative investment, with potentially higher returns than ordinary buy to let. This is because

they can provide more units with less space, to different space standards. Because rent is charged per bed space, income will be higher.

These private developers produce accommodation that is aimed at the higher end of the student market, building dwellings that have facilities such as broadband access and on site security, but which require higher rents to make them sufficiently profitable. There is also a fairly new market for accommodation aimed at recent graduates, which is being exploited by some companies, such as Unite.

Students who are reliant entirely on student loans will not be able to access this accommodation unless they have lucrative part time employment, receive substantial contributions from their families or they take on a large amount of further debt. Low income students will therefore be dependent on the conventional private rented sector if they do not live at home. Rents and living expenses are higher in London than elsewhere. International students are more affluent.

It is therefore clear that any growth in demand for specialist accommodation will come from higher income students, particularly international ones. If there are students currently in the non specialist sector who would prefer specialist accommodation then these will also form part of that market, and these could potentially free up ordinary accommodation for other types of household. There are high levels of housing need in Southwark, so this is a real issue.

Studentification has been an issue in some parts of the country and the lifestyles of many students can be in conflict with host communities. Although Southwark does not experience the levels of 'studentification' as compared with some other towns and cities, the possibility of this effect needs to be remembered when formulating planning policies. There are signs of this, mainly in the north of the borough, where most students currently live, so any new developments need to be carefully situated.

## **Challenges**

1. The challenge is for the Council, institutions and developers to work in partnership to build affordable student housing. With greater social inclusion requirements being placed on universities by the government, they will need to provide accommodation that includes an affordability element to meet diverse needs and perhaps a premium element that subsidises it.
2. In the South Bank area there appears to be enough student accommodation, according to the accommodation manager. The area is attractive to buy-to-let investors who have benefited from student and other sectors; however there are signs of potential oversaturation. Potential conflict between demand for student accommodation and community opposition to students needs to be addressed. The Government is looking at further regulation to give boroughs power to limit numbers of HMOs in areas where they are prolific.
3. Any future growth in demand for specialist student housing depends not only upon increasing numbers of students, but also upon whether there is existing unmet demand from students currently living in privately rented accommodation. The only way to ascertain this would be to carry out specific survey based research of those living in private accommodation. Purpose built student accommodation potentially helps to alleviate the pressure on local housing stock that could be utilised in the general housing market.
4. Shared housing is the primary housing type for students. Consideration needs to be given to how planning restrictions on HMOs might impact on the private rented sector relating to students. In the absence of a real alternative, what will the true impact be on the student housing sector?
5. There is only a limited understanding of diverse needs such as those of students with disabilities or from different cultures, and also of how these needs ought to impact on the design of specialist accommodation.

## Next steps

**Housing and Planning Group:** It is felt that a housing and planning group should convene to consider the policy implications arising from this report. Key officers can meet and look at policy options, requesting more information on specific issues if necessary, and making recommendations for both planning and housing policy.

Some policy options are listed below:

- Southwark could continue to restrict student housing development to schemes carried in partnership with higher education institutions [Southwark based or elsewhere in London based]
- It may be desirable to consider 'zoning' so that student developments are allowed in some districts but not others. The purpose of this would be to prevent over-saturation of students housing in some areas and to promote balanced and mixed communities.
- Southwark might also wish to consider how any proposed schemes will be owned and managed, and to avoid schemes which involve developments being owned by a number of investors.
- Southwark might wish to restrict developments to those companies belonging to accreditation schemes.
- Southwark could look more or less favourably on different sorts of development [i.e. studios or cluster flats because cluster are more affordable, studios are possibly more attractive to international and postgraduate students]
- Consider the need for further research into disability/special needs student housing. This topic has not been looked at in this study. A short piece of further work may be possible.
- Consideration of whether schemes could have an affordable element included, so can be accessed by lower income UK students. However this may conflict with London Plan.
- Design standards: Look at the physical flexibility of schemes, i.e. if growth in student numbers does not materialise, could the buildings be put to alternative uses, with/without physical adaptation [flexible design] - Southwark has recently relaxed its standards, and is now less demanding than some other boroughs. This may increase the attractiveness of the borough to developers. If there is considered to be uncertainty about the future trends in student numbers, then the borough may wish to ensure that flexibility is built into design to allow for future change of use. Cluster flats and dwellings with movable interiors and single ownership may be beneficial in this respect.
- Southwark may wish to consider whether standards for schemes could be developed regionally or sub-regionally, in order to prevent developers going to the boroughs with lowest standards.
- Southwark might wish to commission a survey of students in private rented accommodation, if it is felt that more information is required and if funding is available.
- Consider a specific seminar/event involving local higher education institutions & student representatives, to inform development of strategy and policy [borough & sub-regional, housing & planning]
- Another possible piece of work would be to research policies of other boroughs, to find examples of good practice.

## Conclusion

### Summary of key findings

- There is a lack of data at borough level, making detailed needs assessment difficult. The market for student accommodation is more of a regional or sub-regional issue, because higher education is not organised on borough boundary lines.
- It is difficult to predict how student numbers in Southwark will grow. However if from the base of around 18000 at the time of the 2001 Census, growth runs at the same as the GLA study projected rate for London as a whole, there could be around 24,000 full time students living in Southwark by 2020.

- The current student housing market has significant gaps around choice, affordability, flexibility and meeting greater diversity. There is evidence of growth in the number of post graduate students, therefore potentially increased demand for couple / family accommodation.
- The growth in overseas students cannot be ignored. This group has specific housing needs in terms of services, hospitality and flexibility
- The private rented sector is the next housing solutions for students after halls, it is unclear at this stage how the HMO regulations have impacted on this and what it means in the longer term for students.
- Due to economic and other pressures, the availability of suitable accommodation is likely to become a substantial factor influencing the choice of educational institution.

In conclusion, if the numbers of overseas and postgraduate students continue to grow, then there could be an expansion in the requirement for specialist student accommodation. However some of this is likely to be counterbalanced by decreasing numbers of young people in the home population for the next 10 years or so, although this again could be counterbalanced by an increasing rate of participation in higher education.

The costs of education and maintenance may mean that a higher proportion of students choose to study in their local area and remain living at home with their parents. The GLA concluded that the overall effect would be for numbers in London to grow. However the GLA study was carried out before the 'credit crunch', and if there is worldwide recession then the numbers of international students may not be as high as was predicted.

# Appendices

## Appendix 1

### Bibliography and Weblinks

Source	Information
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London Southbank University	<a href="http://www.lsbu.ac.uk">www.lsbu.ac.uk</a>
University of the Arts London	<a href="http://www.arts.ac.uk">www.arts.ac.uk</a>
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J Rugg & D Rhodes	The Private Rented Sector – its contribution & potential, 2008, University of York, Centre for Housing Policy
Department of Further Education & Science	Student Income and Expenditure Survey 2004/5 Research Report RR725
Unipol/ANUK	Code of Practice for large student developments can be downloaded from: <a href="http://www.anuk.org.uk/LargeCode/Revised%20Ed%20establishment%20Code.pdf">http://www.anuk.org.uk/LargeCode/Revised%20Ed%20establishment%20Code.pdf</a> <a href="http://www.anuk.org.uk/LargeCode/Revised%20Ed%20establishment%20Code.pdf">http://www.anuk.org.uk/LargeCode/Revised%20Ed%20establishment%20Code.pdf</a>

## Appendix 2



### Student Investment Property - High Yields, Cash-Generative and Strong, Growing Rental Demand

#### Student Property Investments - New Build, Houses or Flats – Why you must add some to your portfolio

At Assetz, we look at student property as a long-term investment with high yields (well above those of traditional buy to let) that can typically be cash positive property investments, even in the first year. Student property has such high income that you can often repay a mortgage over around 20 years leaving all of the rental income for the investor at that point. We believe that investing in student property, whether a student house or apartment, is a very wise move. Student numbers have significantly increased over recent years, as A-level results have improved dramatically, meaning more people are attending universities. Whilst university campuses are providing increased levels of in-house accommodation, they are not keeping up with demand; therefore, there is a huge increase in demand for privately-owned [student investment property](#) providing student accommodation.



Student property is a positive, long-term income generator; there is near-guaranteed rental income in all of the best student towns and a constant and growing supply of tenants. Student property is a relatively hassle-free investment; the property is fully managed by an external management agency which takes care of letting, management, services such as electricity and water and all refurbishments, so the investment is virtually hands free. New build student property, as opposed to refurbished houses, is the most hands-off of the two possible types.



The student property that Assetz sources typically achieves between 6% and 7.5% gross yields on purchase price. Many investments tend to be cash positive in the first year after all management costs and mortgage costs - additionally rent is sometimes guaranteed in the first year or the property & may come pre-let with existing or pre-booked tenancies. Unlike the buy to let property market, over the last few years rental levels have been growing consistently due to consistently growing student numbers leading to greater demand than supply. This makes student

investment property an attractive option and has ensured rental incomes have grown consistently.

The student population is a very stable yet growing source of tenant demand, as there will always be students requiring accommodation and Government policies underpin continued student numbers growth. Demand is also less volatile than other property markets, due to the set 'academic year', which predetermines exactly when investors will be receiving an income from their investment. Very reliable data regarding the UK student population is readily available, which allows us to accurately map demand for student property, reducing the investment risk significantly.

These reliable data sources enable us to gain information on up-to-date student property supply and demand which, again, makes the investment much more appealing and less of a risk. The Higher Education Statistics Agency states that there were over 2.25 million higher education students in the UK in 2005. During 2001, the NUS stated that 600,000 students were renting in the private sector in the UK. In 2003/04 British universities provided accommodation for only 21% of potential demand.

Financial pressures mean that universities have very limited capacity to directly increase the supply. This provides opportunity for developers of private student accommodation and investors alike, to become

major players in the development and financing of student accommodation.

Many institutions only provide accommodation for eligible first year students and foreign students, which does not come close to satisfying full demand. As student numbers rise each year, and with universities lacking the resources to keep pace with new requirements, it is becoming increasingly difficult for students to access university-operated accommodation, thus increasing the need for custom-built private student accommodation.



### **Future Market Trends**

Student numbers are set to continue to rise in coming years. The type of student accommodation offered within the UK is set to follow current trends, which is in keeping with the demand pattern we are seeing from students in this day and age. The majority of full time students attending universities in the UK are choosing to live in private rented houses and apartments with an increasing number preferring the benefits of new build student accommodation.

There has been an increase in overseas students attending UK universities in recent years, which is set to continue. An increase in the number of foreign students will place increased pressure upon the current UK student accommodation stock, making demand for private student accommodation higher.

### **Reasons to Invest in Student Property:**

- More students attending university due to Government policy meaning increased demand for property
- Supply of in-house student accommodation is not keeping up with high demand (only 21% of all students have a dedicated en-suite student bedroom available)
- Low risk investment, due to near-guaranteed rental income and access to accurate statistics on student market – market is more stable
- Hands-free investment - fully managed by external agency - particularly low hassle with new build accommodation
- Gross yields of up to 8% achievable due to reliable rental market and high levels of demand – leads to cash positive income in the first year typically, and growing over following years
- Student property rental income increasing at around 4% per annum
- Increase in overseas students is increasing demand for accommodation

### **Focus On New Build Student Property**

We source new-build student property from well-established developers in cities and towns that are popular with students and are undergoing significant student numbers growth. These are on-campus city-living apartments with state-of-the-art facilities including Internet broadband, plasma screens and fully fitted bedrooms, en suite bathrooms and kitchens. Each apartment is designed for occupation of typically 4-6 students with en-suite study bedrooms, internal hall and a large communal kitchen and living area. The apartments are normally fully furnished and the management charges often include all repair costs, furniture renewals. For the hands off investor this can represent a superb investment.

New build student property is a more specialised product for mortgage purposes and [Assetz Finance](#) sources these mortgages for our clients.

### **Reasons to own new-build student investment property:**

- New build property means relatively low maintenance costs
- New build blocks are generally fully managed by a central management company with on-site staff
- High-quality environment leading to a typical 25% premium on rents achieved per week
- Better off students tend to prefer this type of property
- Custom-built property complying with HMO ( housing in multiple occupancy) licensing rules
- Assetz have a steady stream of new build student halls available for investors to purchase individual apartments
- Can be cash flow positive almost immediately - depending upon mortgage chosen

## Appendix 3

www.communities.gov.uk

### New report tackles neighbourhood studentification problem

**Press Release Published** 26 September 2008

A new report that identifies ways to help councils manage high concentrations of Houses in Multiple Occupation (HMOs) was published by Housing and Planning Minister Caroline Flint today.

'Studentification' of university towns is a real concern especially during the summer months when neighbourhoods are left dormant because too many properties (Houses in Multiple Occupation, HMOs) in one area are rented to groups of students. For example students from Queens University, Belfast typically live within a mile of campus and make up more than half of all households in the area with some streets exclusively occupied by students.

The independent research sets out a series of cross cutting measures that could tackle and stop the complex causes and symptoms of concentrated student neighbourhoods. The measures include new planning mechanisms and the widespread adoption of a number of the best common sense local solutions that can be easily adopted.

- Prevent new enclaves by considering changes to the Use Classes Order planning rules allowing for HMOs to be brought under greater council control. This has already been adopted in Northern Ireland.
- Capping and controlling the distribution and the dispersal of HMOs by using the local planning system to set up 'areas of restraint', which have been shown to help balance communities. Nottingham has already established a threshold of 25 per cent per neighbourhood.
- Universities and student unions should develop housing and community strategies that include: community liaison officers; student codes of conduct; neighbourhood helplines; and use of authorised student accommodation agents to help protect students from bad tenancy deals. Many universities have already invested heavily in new student halls which could help ease pressures.
- Councils should target resources such as refuse/letting board collections, street cleansing, fly posting controls at key times in the academic year; establish landlord accreditation schemes; link the demand with regeneration opportunities; work with universities to consider purpose built accommodation; and make better use of their HMO licensing and empty property powers.

Housing and Planning Minister, Caroline Flint said:

"It is not acceptable that current rental practices allow unplanned student enclaves to evolve to such an extent that local communities are left living as ghost towns following the summer student exodus.

"Today's report has identified a series of proven steps councils and universities can take to reduce the dramatic effects of 'studentification' where Houses of Multiple Occupation (HMOs) cluster too closely together.

"I also want to consider further how the planning proposals might help councils change term time only towns into properly planned towns that blend the student populations into well mixed neighbourhoods that are alive all year round."

There are clear economic benefits from student populations. They make a significant contribution to sustaining and regenerating communities. But their dramatic growth in recent years has seen this type of housing problem increase because students typically group together to rent properties.

An over concentration of houses of multiple occupation in one area can have a negative impact on the neighbourhood and local public services. Student turnover is typically high, 52 per cent in Leeds for example, which can affect the sense of community as increasingly student landlords opt to concentrate properties ever closer together in university towns. Cities including Liverpool, Loughborough, Leicester Nottingham, Southampton and Bristol have reported more empty properties during the summer meaning shops, businesses, community facilities and pubs

simply close down creating 'ghost towns'. In addition there can be anti-social behaviour, litter and parking problems during term time.

Minister for Students Baroness Delyth Morgan added:

"We continue to work with universities, student organisations and Communities and Local Government to help the higher education sector address issues related to large concentrations of students living in local communities, where they exist.

"There is good practice in the sector and sharing it amongst institutions will help give students the opportunity to make a positive contribution to the areas in which they live, as well as ensure they have access to good quality accommodation."

The ECOTEC report is part of wider ongoing work, including the independent review of the private rented sector, which is focusing on improving overall standards in the private rented sector and the rights and responsibilities of landlords and tenants. The findings of this report will be taken forward for further consultation that could lead to legislative changes.

Legislation has already been introduced in 2006 to make licensing for certain types of privately rented HMOs mandatory in order to guarantee minimum management standards and property conditions. The new Tenancy Deposit Protection Scheme is also helping tenants keep their deposits secure - almost a billion pounds have been effectively safeguarded in its first year.

## Notes to editors

1. The report: *Evidence Gathering - Housing in Multiple Occupation and possible planning responses* can be found at:

[www.communities.gov.uk/publications/planningandbuilding/evidencegatheringresearch](http://www.communities.gov.uk/publications/planningandbuilding/evidencegatheringresearch).

2. A major review to improve the private rented sector was launched in January by Communities and Local Government. The independent review looks at what problems tenants and landlords face and what works well in the sector and will conclude next month

[www.communities.gov.uk/news/corporate/670940](http://www.communities.gov.uk/news/corporate/670940).

## Appendix 4

### Origins of International Students in London

# International students in London

	2002/03	2003/04	2004/05	2005/06	2006/07
	Students	Students	Students	Students	Students
1	Greece 6,550	China 6,325	China 7,715	China 7,820	China 7,865
2	China 4,645	Greece 6,075	Greece 5,635	United States 5,315	United States 5,615
3	United States 3,990	United States 5,045	United States 5,355	Greece 5,210	India 5,265
4	India 3,535	India 3,900	India 4,340	India 4,320	Greece 4,810
5	Germany 2,815	Germany 3,010	Germany 3,290	Germany 3,360	Germany 3,560
6	Japan 2,355	Hong Kong 2,630	Hong Kong 2,765	Pakistan 3,030	Pakistan 3,145
7	Hong Kong 2,235	Japan 2,415	Pakistan 2,655	France 2,880	France 2,985
8	France 2,115	France 2,325	France 2,535	Nigeria 2,605	Nigeria 2,730
9	Italy 1,865	Irish Republic 2,000	Japan 2,455	Japan 2,515	Hong Kong 2,470
10	Irish Republic 1,820	Italy 1,955	Nigeria 2,345	Hong Kong 2,420	Italy 2,390
11	Malaysia 1,780	Malaysia 1,795	Irish Republic 2,195	Irish Republic 2,260	Irish Republic 2,265
12	Sweden 1,430	Pakistan 1,685	Italy 2,125	Italy 2,220	Cyprus 2,225
13	Nigeria 1,345	Nigeria 1,675	Malaysia 1,900	Cyprus 2,020	Japan 2,225
14	Spain 1,335	Spain 1,440	South Korea 1,665	South Korea 1,815	Poland 2,040
15	Singapore 1,240	Sweden 1,360	Cyprus 1,585	Malaysia 1,720	South Korea 1,985
16	Pakistan 1,240	South Korea 1,345	Spain 1,570	Poland 1,560	Malaysia 1,760
17	Taiwan 1,180	Singapore 1,265	Sweden 1,365	Spain 1,535	Spain 1,570
18	Cyprus 1,150	Cyprus 1,260	Taiwan 1,360	Taiwan 1,430	Taiwan 1,540
19	South Korea 1,095	Taiwan 1,255	Singapore 1,210	Sweden 1,335	Sweden 1,405
20	Thailand 935	Thailand 950	Thailand 1,100	Thailand 1,225	Thailand 1,265
Top 20 Total	44,665	49,700	55,175	56,590	59,120
Grand Total non-UK	65,525	73,405	82,660	85,720	89,955

Source: HESA Student Record. Please note due to rounding of figures, the sum of numbers in each row or column may not match the total shown.

## Appendix 5

### What other boroughs do

**Tower Hamlets** have designated some parts of the borough as preferred locations for student housing. It also looks at sites which were not already set aside for housing, such as former warehouses, service yards etc. Looks at locations within close proximity of HEIs [1 mile radius], with good transport links & safe areas. Has design standards which look at quality of development, mix of studios & clusters, cycle & service parking spaces & standards for room sizes.

**Camden** allow student housing on windfall sites rather than those designated for housing provision.

They request details of use in summer months to prevent usage as a hotel and restrict occupation to students in full or part-time education in London institutions. Units must not be sold separately

## Appendix 6

### Students in Southwark 2001, aged 19+

	Living in a household					Living in a Communal Establishment			Total
Ward	Student living Alone	Living in parent(s) household	All student group household	Other Household	Sub-total	Educational Establishment	Other communal establishment	Sub-total	Total
Brunswick Pk	60	161	141	316	678		3		678
Camberwell Green	115	178	166	370	829		29	29	858
Cathedral	71	110	196	309	686	1,503	186	1,689	2,375
Chaucer	119	129	401	415	1,064	893	31	924	1,988
College	35	131	30	127	323		3	6	329
East Dulwich	38	152	110	219	519				519
East Walworth	87	119	260	395	861		3	3	864
Faraday	74	198	184	339	795		3		795
Grange	103	84	218	345	750	143	8	150	900
Livesey	63	179	124	312	678				678
Newington	69	157	206	368	800				800
Nunhead	48	155	155	235	593			3	596
Peckham	33	207	124	284	648				648
Peckham Rye	42	117	89	210	458		9	9	467
Riverside	68	61	151	238	518	185		188	706
Rotherhithe	56	95	212	332	695				695
South Bermondsey	75	76	178	250	579				579
South Camberwell	56	128	167	334	685	347		348	1,033
Surrey Docks	36	94	194	352	676				676
The Lane	45	155	171	245	616		36	36	652
Village	20	114	69	160	363				363
<b>Southwark Total:</b>	<b>1,308</b>	<b>2,800</b>	<b>3,547</b>	<b>6,156</b>	<b>13,811</b>	<b>3,075</b>	<b>309</b>	<b>3,384</b>	<b>17,195</b>
<b>London Total:</b>	<b>22,160</b>	<b>87,244</b>	<b>57,253</b>	<b>94,965</b>	<b>261,892</b>	<b>20,233</b>	<b>5,410</b>	<b>25,643</b>	<b>287,535</b>

Source: GLA Student Housing Requirements Study [2001 Census]

N.B. There are various small errors in the table which have been carried over from the GLA study

## Appendix 7

Table - permissions granted for Student Accommodation in Southwark since 1993

Site Address	Post code	Permission date	Prop C1 Hal	Prop SG BE
110 Peckham Rd	SE15	21-09-2001		93
1-7 Jamaica Rd	SE15	30-03-2000		28
48 Rushworth St	SE1	28-06-1999		40
282-302 Borough High St.	SE1		253	
8-20 Pocock St	SE1	19-03-1990	293	
Island Site Great Dover St/ Becket St	SE1	07-12-1998		429
Island Site – 165 Great Dover St	SE	08-08-1996		780
National Grid House (Ex Bankside Hse)	SE1	22-11-1994		576
Royal Eye Hospital 1 St Georges Circus	SE1	18-08-1994		620
90-102 Newington Butts	SE11	22-12-1993		106

(C1 & SG class – student of residence usually on campus)

## Appendix 8

### Launch of the new ANUK Code for Large Residential Developments for Students Accommodation managed by Educational Establishments

#### A New Gold Standard for Student Accommodation Management

The new ANUK Code for Educational Establishments was launched on 24th July 2008.

This new Code was the outcome of an in-depth review of the previous Code carried out by a Working Group and responded to concerns from educational establishments that the previous Code was over-proscriptive and failed to recognise the accommodation management culture that was special to universities and colleges.

It is important to see this revision in the light of the very positive experience that has taken place with the previous Codes (which together cover over 110,000 bed spaces throughout the United Kingdom) and those accommodation providers that have joined and supported it.

The review built on the strengths of the previous Code and has eradicated weaknesses identified. In particular, it has built upon the excellent and ground-breaking self assessment and verification procedures of the previous Code and its mission to spread best practice.

The Code's purpose is to ensure that educational institutions manage their accommodation to a transparent set of management standards and are accountable to their consumers for those standards. The Code also aims to improve, and measure, management performance as a basis for continuous self-improvement. Students, and their parents, value the Code as providing them with both peace of mind and offering rights of redress if problems are not dealt with.

The new Code has been written afresh and reflects institutional cultures, introduces a peer-to-peer verification and inspection routines to ensure compliance and allows for benchmarking of management performance and the transmission of good practice between members.

The review has fully involved that National Union of Students (NUS) who have a high sense of ownership of the outcome and that their support has been an essential part of developing the Code.

Many others were also involved in the review including the Association for Student Residential Accommodation (ASRA), the Conference for University Business Officers (CUBO), the Association of Managers of Student Services in Higher Education (AMOSHE), the Accreditation Network UK (ANUK), the Association of Colleges (AOC) and, on behalf of the Government, representatives of Communities and Local Government

In more detail the new Code has:

- removed a number physical standards and concentrated more on management matters
- improved its coverage of matters relating to student care
- built on the self assessment and verification processes so that peer-to-peer review between educational institutions could be undertaken between institutions. Each member institution will have a nominated member of staff responsible for operating and enforcing the Code and that these staff will form a trained cadre of reviewers issuing confidential reports for other institutions producing comparative spider grams of assessment and verification retained the complaints and Tribunal system to maintain accountability and transparency.

This Code builds on the past ANUK experiences over the last 24 months and offers a very real alternative to the existing UUK Code for those institutions wishing to establish a "gold standard" for accommodation management.

[Download the Press release](#) 

[Download the Code](#) 

[Visit the ANUK home page](#)