GARDEN HALLS, CARTWRIGHT GARDENS

Justification for Increased Student Bed-spaces

February 2013

UNIVERSITY OF LONDON

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Executive Summary

The redevelopment proposals to increase the quality and number of student bed-spaces at the University of London's Garden Halls are a direct response to an identified shortfall in purpose built student accommodation supply.

Why more rooms are necessary: London remains the most acutely undersupplied city in the UK for student accommodation, despite recent growth in private provision of student accommodation. The shortfall of purpose built student accommodation is acknowledged in Mayoral policy which takes a cautious estimate of a 18,000 – 27,000 deficit. The University of London's own research demonstrates the shortfall could be excess of 34,000 bed-spaces.

Undersupply leads to the continued proliferation of students in the private rented market housing sector, placing increasing pressure on the already inflated market and taking student management away from higher education institutions, resulting in the negative connotations of studentification.

In 2011/12, approximately 97,605 under-graduate and post-graduate students enrolled within the University of London federation. The availability of high quality, affordable and safe student accommodation is a crucial factor in students' decisions on where to study. However, the University and its affiliated colleges have a total supply of only 16,578 bed-spaces and is unable to provide to all applicants.

How important is the quality of accommodation to attracting students: Alternative accommodation, in the form of private student halls of residence, private rented sector and staying at home, is available. However, there is an identifiable preference, particularly among first year undergraduates, to live in purpose built accommodation provided by institutions due to typically lower rents, shorter tenancy lengths and overall student experience. The average price for University of London en-suite accommodation is approximately £2,400 less expensive per annum. In addition to affordability, issues such as improved cleanliness, maintenance, pastoral care and security, are aspects of university managed purpose built student accommodation which lead to it being favoured over alternative arrangements.

Why Garden Halls: The University of London takes a strategic approach to the management of its intercollegiate hall provision, and recognises the need to provide additional accommodation through a range of options. The redevelopment of its existing student accommodation is one of five routes being pursued.

Over the past ten years, three of the University's eight intercollegiate halls have been refurbished to expand capacity. Feasibility studies are underway in respect to four of the five remaining halls which have not already recently been redeveloped, including Canterbury, Commonwealth and Hughes Parry Halls (which collectively comprise Gardens Halls).

The existing condition, central location and site characteristics of the Garden Halls make it a highly sustainable and viable site for redevelopment. The proposals will contribute towards the University of London's bed-space supply target to enable the University and its affiliated colleges to remain an attractive and affordable option in an increasingly competitive higher education environment.

1.0 Introduction

This note has been prepared to support the case for an increased number of bed-spaces at the University of London ("University") Garden Halls, Cartwright Gardens as part of the redevelopment proposals currently subject to ongoing pre-application discussions.

The proposals, in their present form, propose an increase in student bed-spaces by approximately 228 from 992[1] to approximately 1220[2] (a 23% increase). This is to meet an identified shortage in the University's purpose built student accommodation requirements, as detailed in this note.

The note provides an overview on the University and its intercollegiate halls, including Garden Halls, before addressing:

- London-wide and the University's specific demand for purpose built student accommodation;
- Options to increase the University's Provision; and
- The rationale for Garden Halls.

[1] There are currently 992 student bed-spaces on the site. A further 5 rooms are allocated for staff, including 3 for wardens and 2 for administration staff living on site. 16 rooms comprise rooms for guests associated with the UoL.

[2] The number of bed-spaces proposed is still in the process of being finalised as design evolution continues.

2.0 University of London Intercollegiate Halls

2.1 University of London

The University is a globally recognised federal university. It acts as an umbrella institution for 18 self-governing colleges (including UCL which was ranked 4th best university globally by QS World University Ranking 2012-2013) and 10 other smaller specialist research institutes. 8 of the Institutions[3] are based in the London Borough of Camden.

In 2011/12 the University had a total of approximately 97,605 under-graduate and post-graduate students enrolled (HESA Statistics). In 2010/11 42% of those enrolled[4] comprised overseas students (HESA Statistics).

The University of London's Intercollegiate Halls of Residence form a crucial part of the accommodation provision for students, alongside:

- College Student Hall of Residence;
- Private Student Hall of Residence;
- In a shared flat / house rented from private landlord/ letting agent;
- With a resident landlord;
- Within own home; and
- At home (with parents).

Intercollegiate Halls are open to students at any of the University's colleges and form an important offering to support colleges' needs.

2.2 University of London's Intercollegiate Halls

The University has eight intercollegiate Halls of Residence available to full-time students of the university:

- College Hall;
- Connaught Hall;
- International Hall;
- Lillian Penson Hall;
- Nutford House; and
- The Garden Halls (Commonwealth Hall, Canterbury Hall [including York Hall] and Hughes Parry Hall).

Details and the location of these Halls are shown in Figure 2.1.

[3] Birbeck College, Central School of Speech and Drama, Institute of Education, University of London (Institutes and Activities), London School of Hygiene and Tropical Medicine, The Royal Veterinary College, The School of Oriental and African Studies, University College London (see Appendix 1).

[4] In 2010/11 a total of 86,275 students were enrolled, 36,440 comprised overseas students. The number of overseas students is not currently available for the 2011/12 academic year.

2.0 University of London Intercollegiate Halls

Figure 2.1: Location of the University's Intercollegiate Halls

2.0 University of London Intercollegiate Halls

2.3 The Gardens Halls

The Garden Halls are the largest and most centrally accessible of the University's Intercollegiate Halls (Figure 2.1). In 2012/13, 992[5] student bed-spaces were allocated to students of the University's colleges, with a further 5 specifically reserved for staff and 16 for lecturers and guests.

The bed-spaces are split between three, adjacent but unconnected Halls: Commonwealth Hall, Canterbury Hall (including York Hall) and Hughes Parry Tower (see Table 2.1).

Table 2.1: Garden Halls Overview

Garden Halls	Overview of Hall
Hughes Parry Hall	17 storey tower providing accommodation on 14 floors for 315 students. On each floor there is a bathroom-shower-toilet- block, a drying room and a shared pantry with light cooking facilities.
Canterbury Hall (including York)	Provides 235 single study bedrooms. This includes 26 rooms with private bathrooms, which are mainly offered to postgraduate or final year undergraduate students.
Commonwealth Hall	Up to 10 storey block providing accommodation on 9 floors for 442 students, the majority of which are undergraduates. All floors have a bathroom-shower-toilet block.

In the first instance, students typically apply to their college, providing it has its own halls of residence. Students can apply to intercollegiate halls if: the college does not provide its own halls; there is a specific reason why intercollegiate halls are more suitable; or, most often, because demand outstrips supply for college halls.

Each college is allocated an annual bed-space quota for each of the intercollegiate halls by the University. This is calculated on a basis of the average of their quotas filled over the previous three years. Most colleges take their whole quota each year. For 2012-13, University College London, King's College London and the London School of Economics took the majority of the quota at Garden Hall (804 rooms) (Appendix 2). Further details of demand and supply for University intercollegiate halls and the Garden Halls are provided in the next section.

[5] Whilst 976 rooms were allocated via the college quota system in 2012/13, a further 16 of the total student rooms are for "Senior Members". Senior Members comprise post-graduate students who form part of the pastoral support team and do not pay rent for their residence in the Garden Halls.

3.0 Demand for Purpose Built Student Accommodation

3.1 London-wide demand and shortfall for purpose built student housing

At present purpose built student accommodation ("PBSA") is home to 18 – 22% of university students in London (GLA, 2010[6]). Nevertheless, **London is the most acutely undersupplied city in the UK for student accommodation**. This results in many students turning to private sector rented accommodation through necessity, as oppose to always choice.

There is overwhelming evidence of an undersupply of affordable student accommodation in London. **Mayoral policy recognises that there could be a requirement for 18,000 to 27,000 additional student bed-spaces between 2011 and 2021** (London Plan, July 2012 and Housing SPG, November 2012, Para 3.1.59). Meanwhile, the Greater London Authority's (GLAs) Strategic Housing Land Availability Study identified capacity for 17,000 specialist student accommodation places. It is also a Mayoral objective to make student accommodation more affordable (Para 3.1.26 of Housing SPG).

The above estimates are based on scenario testing using government time series data showing trends in undergraduates and postgraduates tested at an Examination in Public[7]. They take account of demographic changes which might bear on UK students and tests assumptions about changing levels of future overseas students, as a result of various factors including the impact of rising tuition fees.

Research carried out by the University indicates that the shortfall is higher. There are only 67,478 PBSA bed-spaces across London for 292,660 students within all London universities[8] (the University's Accommodation Working Group, 2012). A breakdown of the current provision of 67,478 bed-spaces is set out in Table 3.1.

Table 3.1: Current Supply of PBSA (University of London Accommodation Working Group 2012 derived from Universities UK.ac.uk and ANUK)

University of London Halls,	16,578
UUK Halls external to the University of London	19,697
Accreditation Network UK (ANUK[9]) Halls (Nomination and direct let)	27,576
Charitable and religious non-accredited.	3,627
Total	**67,478**

[6] Based on assessment of types of accommodation which students currently occupy, provided by the University of London, Drivers Jonas Deloitte and King Sturge, which each hold comprehensive data sets of existing provision and pipeline schemes.

[7] The figures have been tested through the London Plan and Housing SPG Examinations in Public (during 2010 – 2012). This is explained in the Mayor of London's Draft Replacement London Plan Examination in Public Housing Technical Paper – see Appendix 4.

[8] This includes all London universities and is not only limited to the University's affiliated higher education institutions. The specific UoL provision is explored in the next section.

[9] ANUK (Accreditation Network UK) Halls comprise other accredited Halls across London.

3.0 Demand for Purpose Built Student Accommodation

By comparison, figures for full-time students in London in 2010 were:

Table 3.2: London Full-Time Student 2010 (HESA and Accommodation Working Group)

	UG	PG	TOTAL
University of London	54,205	32.070	86,275
Non-University of London HEFCE	150,850	38,535	189,385
Others (estimate)[10]	7000	12,000	17,000
			292,660

From the above figures, it can be derived that **there is currently one bed-space per 4.33 students available in PBSA. This reduces to one bed-space per 8 potential applicants when only provision provided directly by higher education institutions is included**. Within the University of London federation, the situation is marginally better with **5.2 applicants per bed-spaces** (see Section 3.2 for further detail on specific University of London shortfall).

It is acknowledged that not all students will require bed-spaces. Based upon previous accommodation applications, if a rate of 50% for full-time postgraduate students and 30% for full-time undergraduate students is assumed, this would equate to demand for 100,000 bed-spaces. A shortfall of over 34,000 bed-spaces results which substantially exceeds figures set out in the London Plan and Housing SPG.

A survey of a number of the University's larger colleges[11] reaffirmed the under supply. **On average there were more than two applications for every bed-space** (23,207 applications against 11,640 bed-spaces) in 2012, notwithstanding that many second and postgraduate students are actively discouraged to apply.

[10] There are a number of US universities and private institutions in London (eg NYU in London, Regents Business College etc) and also a number of Colleges from outside London that are setting up their own London campuses (UEA, Glasgow Caledonian University). An approximate estimate for these figures would be 15,000 full time students.

[11] Goldsmiths, King's College London, London School of Economics and University College London.

3.0 Demand for Purpose Built Student Accommodation

3.2 University of London Demand, Supply and Shortfall for Purpose Built Student Accommodation

In 2011/12 the University had a total of approximately 97,605 undergraduate and postgraduate student enrolled (HESA, 2012). The University and affiliated colleges have a total supply of only 16,578 bed-spaces (Table 3.1).

It is acknowledged that not all students apply to intercollegiate halls. **The average number of applications between 2009 - 12 was approximately 4,450 per annum, whilst the total bed-spaces was approximately 2,800, resulting in a shortfall of approximately 1,650 units**.

In 2012-13 specifically, the University accepted 2,711 students into its Intercollegiate Halls. 407 remained on the waiting list. The figures for the preceding years are set out in Table 3.3. It should be highlighted that these figures represent demand and shortfall following the allocation of college-specific accommodation, given students apply in the first instance to their college and only if unsuccessful, they then apply to the Intercollegiate Halls and may alongside this explore alternative options (such as the private sector purpose built student halls and the private rented sector). Thus, actual demand for the University's intercollegiate accommodation could be substantially higher than the waiting list reveals.

Table 3.3: University of London Intercollegiate Halls Acceptances and Waiting Lists (Academic Years 2012/13 – 2009/10)

Academic Year	Accepted Students	Students on Waiting List
2012/13	2711	407
2011/12	2524	629
2010/11	2699	752
2009/10	2598	939

Table 3.3 sets out that over the past four years, the number of spaces available has increased. As a consequence, the number of students on the waiting list has declined. Nevertheless, **there is still a demonstrable shortfall of University of London student housing and a number of students initially placed on the waiting list are forced to seek private sector accommodation as University PBSA cannot be secured for their arrival.**

Furthermore, the above figures should be interpreted as a lower estimate as many second year students are deterred from re-applying for Halls and turn instead to the private market.

3.3 Preference for and importance of Institutional Student Housing

In recent years, private developers have capitalised on the shortage of purpose built student accommodation resulting in a substantial growth in private provision, both as an absolute figure and comparative to institutional provision. Nevertheless, there is still a strong student preference for institutional-run PBSA both from students and others (including surrounding residents, owners and planning authorities). The reasons for this comprise:

3.0 Demand for Purpose Built Student Accommodation

- *Rent*: rents are typically more affordable in HE purpose built student accommodation, than that provided by private providers and within the private rented sector.
  - **Per annum students in the University's Intercollegiate Halls pay on average £2,335 less than those in private sector accommodation**.
  - This is prior to any additional bills for private accommodation (the University annual costs includes bills, including two meals a day, seven days a week, and internet access). Thus, the living cost associated with private sector rented accommodation is likely to be even higher than the University managed accommodation.

Table 3.4 : Comparison of annual rents between sectors

	Annual Cost of Standard En-Suite Rooms
Average University of London Price (2012-13)	£8,498[12]
Average private rented sector price (University of London / UPP estimate)	£10,833[13]

  - Following the increase in tuition fees value-for-money accommodation is even more important for students. A UPP commissioned survey of 1507 university applicants and students revealed that being able to afford the rent is the aspect of accommodation considered most important (YouthSight, 2012a)[14].
  - A further advantage of PBSA is that when searching for accommodation, fees are all-inclusive (including catering where relevant) giving students a clearer indication of cost at the outset for their budgeting.
- *Length of tenancy*: students typically benefit from shorter tenancies in HE affiliated purpose built student accommodation, by comparison to private sector Halls and private rented accommodation.
  - Within University of London Halls the typical length of tenancy is 38-40 weeks;

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[12] Figures has been derived from an average of the weekly rent for a single en-suite room at the University of London's Intercollegiate Halls, multiplied by 40 weeks (the average tenancy for University of London intercollegiate Halls). Daily and weekly rents for a range of room types at each of the University of London Intercollegiate Halls are included at Appendix 2.

[13] Figures have been derived from an average of the annual rent for 25 private sector student halls (as identified in the table at Appendix 3).

[14] This was followed by issues such as cleanliness and maintenance and good security, which are benefits of purpose built student accommodation managed by institutions and discussed further below

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3.0 Demand for Purpose Built Student Accommodation

- By comparison an analysis undertaken of 37 privately student hall providers in London[15] revealed that the length of tenancy was 50 or 51 weeks, in all except for 4 developments[16] (see Appendix 6 for details of private hall comparisons).
- **The extended tenancy of private rented halls adds to the higher rents in private sector provided accommodation**.

- *Student experience*: programmes to engage students in a range of community activities and support their adjustment to independent living are run in intercollegiate halls contributing to the provision of an overall student life experience.
  - A survey by Youth Sight (2012) revealed that **71% would prefer university halls of resident in their first year of university**. For students at Russell Group and 1994 Group universities this rose to 84% and 82% respectively, whilst students at Million + and Alliance institutions had typically lower response rates (30 and 51% respectively) as more preferred to live at home with their parents.
  - **Overseas students were significantly more likely than home fee payers to say they would live in university halls of residence** (Youth Sight, 2012). The University has a high proportion of overseas students; in 2010/11 42% (36,440) comprised overseas students[17] (HESA Statistics).
  - **Intercollegiate colleges in particular are liked for the opportunity to mix with students from different colleges, disciplines and countries** (University of London Student Survey). Their diverse nature allows overseas students in particular, to integrate into the Capital's student community.
  - As abovementioned, cleanliness, maintenance and security are other important aspect of student accommodation for applicants and students (Youth Sight, 2012b), with cleanliness and maintenance coming second and third behind affordability. It is considered that PBSA, with management arrangements either by the higher education institution or private body, are likely to result in higher level of cleanliness, maintenance and security by virtue of operational contracts.

3.4 Summary

There is an identified gap between the current supply and demand of London's PBSA. Despite the recent growth in private provision of student accommodation, London remains the most acutely undersupplied city in the UK for student accommodation. This leads to the continued proliferation of students in the private rented market housing sector, placing increasing pressure on the already inflated market and taking student management away from higher education institutions. Both Mayoral and Camden policies seek to manage the impact of student accommodation on the private rented sector, both in terms of reducing capacity for normal residential accommodation and the associated impacts of unmanaged studentification.

[15] Including Liberty Living, Nido, Urbanest, Unite and Opal amongst others.

[16] Where it fell below 50 – 51 weeks typical tenancies were between 42 and 44 weeks.

[17] The number of overseas students is not currently available for the 2011/12 academic year.

3.0 Demand for Purpose Built Student Accommodation

The disparity between supply and demand is only exacerbated for institutional providers, as the typically lower rents, shorter tenancy lengths and overall student experience, mean they are favoured over that offered by the private sector. Alongside increasing provision, making student accommodation more affordable is a Mayoral objective (para 3.1.26 of Housing SPG).

In addition, to affordability factors which influence student experience and issues such as improved cleanliness, maintenance, pastoral care and security, are aspects of HE managed purpose built student accommodation which lead to it being favoured over alternative arrangements.

4.0 Increasing the University of London's Provision

It is therefore evident that there is a shortage in supply of affordable bed-spaces that would weaken the University and London's position as one of the leading education institutions in the World. **The University of London Accommodation Working Group was unanimous in agreeing that acquiring no new bed-spaces would entail a significant risk to the Federation as the availability of accommodation, and quality of accommodation services in general, are increasingly important factors in students' decisions of where and how to study**.

Consequently it has undertaken a review of its eight intercollegiate halls within the Bloomsbury and Paddington areas and its overall accommodation strategy. There are a variety of ways in which additional bed-spaces can be sourced:

- **New build/ acquisition of residences** – through the acquisition of existing and new build student accommodation blocks, or new sites on which student housing could be developed. However, the long-term dynamics of the London student accommodation market are extremely favourable to property developers and investors, due to their ability to command high rents. Consequently competition for available sites is high, resulting in inflated land values which price many higher education institutions, such as the University of London out of the market. Furthermore in making decisions on redevelopment of new sites for student housing, planning authorities have to balance the interests of providing conventional dwellings, especially affordable housing, and student housing. In many instances authorities prefer the redevelopment of existing student housing sites (see (2) below).
- **Redevelopment of existing University of London Halls to provide increased bed-spaces** – an alternative option is to increase capacity through the redevelopment of existing University of London Halls. Limited increase can be achieved through internal alteration, although given the historic (and often Statutory Listed) nature of many of the buildings, growth through internal configuration is constrained. Extension and external alteration on the majority of the University;'s sites is often constrained by virtue of their locations within central London and conservation areas, however the University have been evaluating their existing portfolio to investigate feasibility (see Table 5.1).
- **Short-term nominations with private providers** – negotiating preferential rates and terms for blocks of rooms in student residences operated by private developers, for example Unite or Liberty Living. This would lead to above average rents, potentially resulting in low take-up and voids as many private PBSA providers are currently experiencing. The above section has already highlighted students and policy preference for affordable student rents;
- **Headed tenancy** – leasing a property from a landlord to let to students, enabling student's landlord to still be HEI, and making the HEI the tenant of the landlord. Whilst this is a relatively low risk option, provided that appropriate properties and landlords are selected, it can have high costs of administering. Particularly in Central London where private sector landlords can command high rents, reducing the possibility of affordable rent for students. It does however provide flexibility for the University as contracts could be terminated with the landlord on an annual basis.
- **Private landlord accommodation** – the University already operates a landlord registration system which enables approved landlord properties to be promoted to students of the university by a database. Whilst promoting a more independent living, less institutionalised experience, it exposes students to the private market, including high rents and uncertainty. By virtue of the high costs in Central London, most students end up having to travel greater distances. In addition, this option reduces supply of rented

4.0 Increasing the University of London's Provision

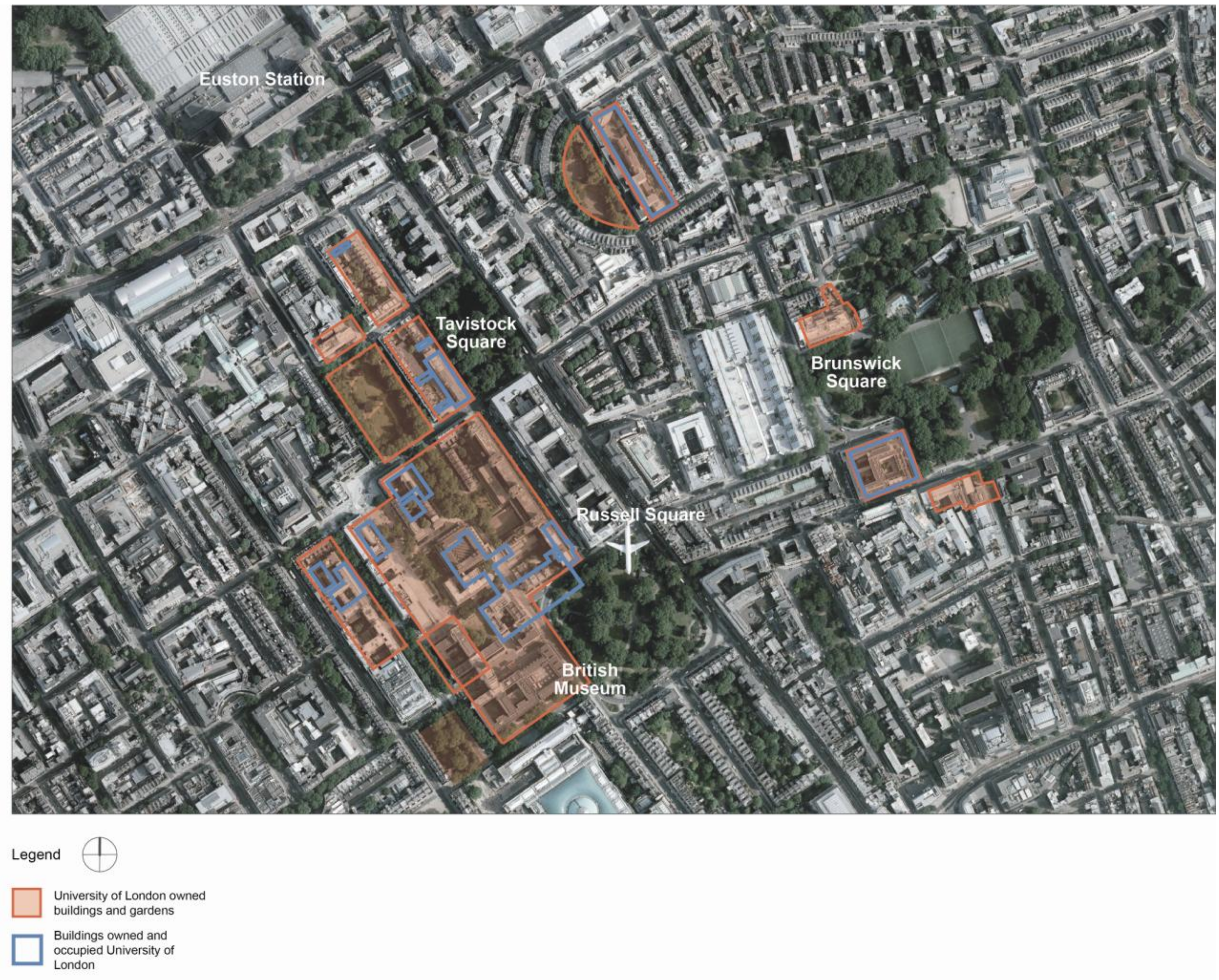
accommodation to the private rental residential market, thus increasing rents throughout London.

From the above, it can be determined that whilst options (3), (4) and (5) represent suitable short to medium term solutions they are not likely to create, sustainable affordable accommodation to provide a longer term solution. Often under such arrangements, rent control and student management, including welfare and behaviour, fall outside the remit of the higher education institution.

Whilst (2), the acquisition of new build residences or of sites suitable for redevelopment for student housing, represents the most favourable option to increase capacity, there is intense competition for available sites and resulting land values which price may higher education institutions out of the market.

As illustrated in Figure 2.1 the University's accommodation is centred around Bloomsbury and caters well for centrally located colleges (Figure 4.1). However, by virtue of financial and planning constraints the University is looking at new sites outside Central London that given new transportation links, such as Crossrail, are becoming increasingly accessible. The University are conducting ongoing research on desirable locations for increased bed-spaces, outside of the inflated Central London market. However, this does not always form the most appropriate solution as it results in student accommodation being provided considerable distances from education institutions.

Figure 4.1: Map of University of London owned buildings



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4.0 Increasing the University of London's Provision

Redevelopment of existing halls of residence (2) provides a unique opportunity for the University to meet a proportion of the demand for modern and secure accommodation and also keep the accommodation affordable. Nevertheless, site constraints and planning restrictions, amongst other factors, limit the potential for redevelopment.

The University are therefore pursing a multi-faceted to increase accommodation provision from their 2012 baseline, including the following target increases:

- Options (1) and (2): 1,500 beds;
- Option (3): 200 plus beds;
- Option (4): 300 plus beds;
- Option (5): unlimited.

In the event that new build residences and potential sites cannot be acquired, and existing sites are not suitable for redevelopment increased pressure will be put on options (3) – (5) to provide additional capacity for the University.

The remainder of this note focuses on the redevelopment of existing University of London Halls to provide increased bed-spaces. It examines the sites available to the University and the rationale for the proposed redevelopment of the Garden Halls. It should also be noted, that PBSA has potential to mitigate pressure on the stock of private rented homes in Camden, an objective of both Camden's Housing and Planning policies.

5.0 Why Garden Hall's

5.1 Redevelopment Potential of University of London Inter-collegiate Halls

The University has undertaken a review of its entire student housing portfolio, including Garden Halls, to seek to increase the number of bed-spaces from new build, acquisition and redevelopment of existing sites by 1,500 bed-spaces. Table 5.1 sets out the position in respect to the University's remaining Intercollegiate Halls (numbers correspondence to those Halls identified in Figure 2.1, whilst 1. Garden Halls is dealt with separately below).

Table 5.1: Summary of Redevelopment Potential

Halls	Location	Current Student Rooms	Rationale
2. Connaught Hall	Tavistock Square, London, WC1H 9EX	212	The partial refurbishment of Connaught Hall took place in 2010 to create an additional 19 rooms. 12 of the rooms were en-suite. The Halls comprise a Grade II* Listed Terrace of ten Georgian townhouses built by Thomas Cubbitt in the 1820s. The Heritage Significance of the buildings limit further redevelopment, beyond the internal alterations consented in 2010 (LPA Ref: 2010/1233/L). Any further increase in capacity would involve external alterations to the Grade II* Listed Terrace.
3. International Hall	Lansdowne Terrace, London, WC1N 1AS	860	International hall was refurbished and extended for re-opening in 2003. The new units sought to increase provision of post-graduate and family units, of which there was greatest shortage at that time. The redevelopment sought to maximise the site's capacity and no further increase is considered achievable at this point in time.
4. College Hall	Malet Street, London, WC1E 7HZ	357	College Hall was refurbished and extended for re-opening in 2007 to increase bed-spaces to 357 (an increase of 87

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5.0 Why Garden Hall's

			spaces). The new units sought to increase provision of single, en-suite rooms. The redevelopment sought to maximise the site's capacity and no further increase is considered achievable at this point in time.
5. Nutford House	Brown Street, London, W1H 5UL (City of Westminster)	227	Nutford House was built in 1916 and acquired by the university in 1946. It currently provides beds for 198 students in 159 single rooms and 21 shared rooms. The existing block comprises a large 6 storey mansion-style block, and five terraced houses in Brown Street. The Halls reflect the scale and form of surrounding buildings within the Portman Estate Conservation Area, and already comprise one of the higher elements in the immediate area. It is considered that the existing arrangements maximise use of the site within the building envelopes. Any proposals to increase rooms would likely result in the need for extension or whole-scale redevelopment of the block which could pose serious challenges on the site in heritage terms.
6. Lillian Penson Hall	Talbot Square, London, W2 1TT (City of Westminster)	320	Lillian Pension is a post-graduate Hall currently providing 213 single rooms, 22 single studios, 6 small flats, 20 shared rooms and a range of 48 rooms and flats for students with partners. The site falls within the Bayswater Conservation Area.

5.0 Why Garden Hall's

			The University are undertaking an initial appraisal of Lillian Penson Hall, with the intention to upgrade and expand existing facilities.

From Table 5.1 it can be seen that the University has explored the potential of its existing sites, in addition to Garden Halls. Partial refurbishment has already taken place at Connaught Hall, International Hall and College Halls, whilst redevelopment at Lillian Pension Halls is currently subject to feasibility analysis. The standard of existing accommodation is also an important consideration in reviewing the feasibility and timing of redevelopment decisions. Whilst a number of the abovementioned Halls have recently been refurbished, Garden Halls are considered to be approaching the end of their economic life and in need of replacement; significant amounts of money are currently required annually to maintain the existing buildings. It is thus seen, that the University are taking an integrated approach to redevelopment; seeking to increase capacity, where feasible across its sites, and having regard to both the quality and quantity of accommodation.

In addition, the University has investigated the possibility of acquiring alternative sites, both with existing Halls and suitable for development to provide new student accommodation. In particular:

A bid has been submitted for the acquisition of a lease to a building (outside Camden) which, if the bid is successful, would be refurbished and reconfigured to provide 215 self-catered en-suite rooms.

Negotiations are also taking place over the acquisition of the freehold to a student hall currently being constructed, which will provide 347 beds, mostly self-contained en-suite rooms and some studios too.

The University is often unable to compete with the private sector in the acquisition of new sites and student residences, although the orientation of planning policy in favour of higher education institutions is helping to boost the case.

Even if these two potential acquisitions were successful, they and the additional numbers at the Garden Halls will, between them, not achieve the target set by the University's Accommodation Working Group.

Redevelopment at the Garden Halls should therefore be seen as part of the University accommodation strategy. The current redevelopment proposals seek to strike an appropriate balance to the University's requirements, within the planning and heritage constraints of the site. The section below provides a brief overview of the benefits of Garden Halls and its ability to accommodate increased students.

5.2 Benefits of Garden Halls

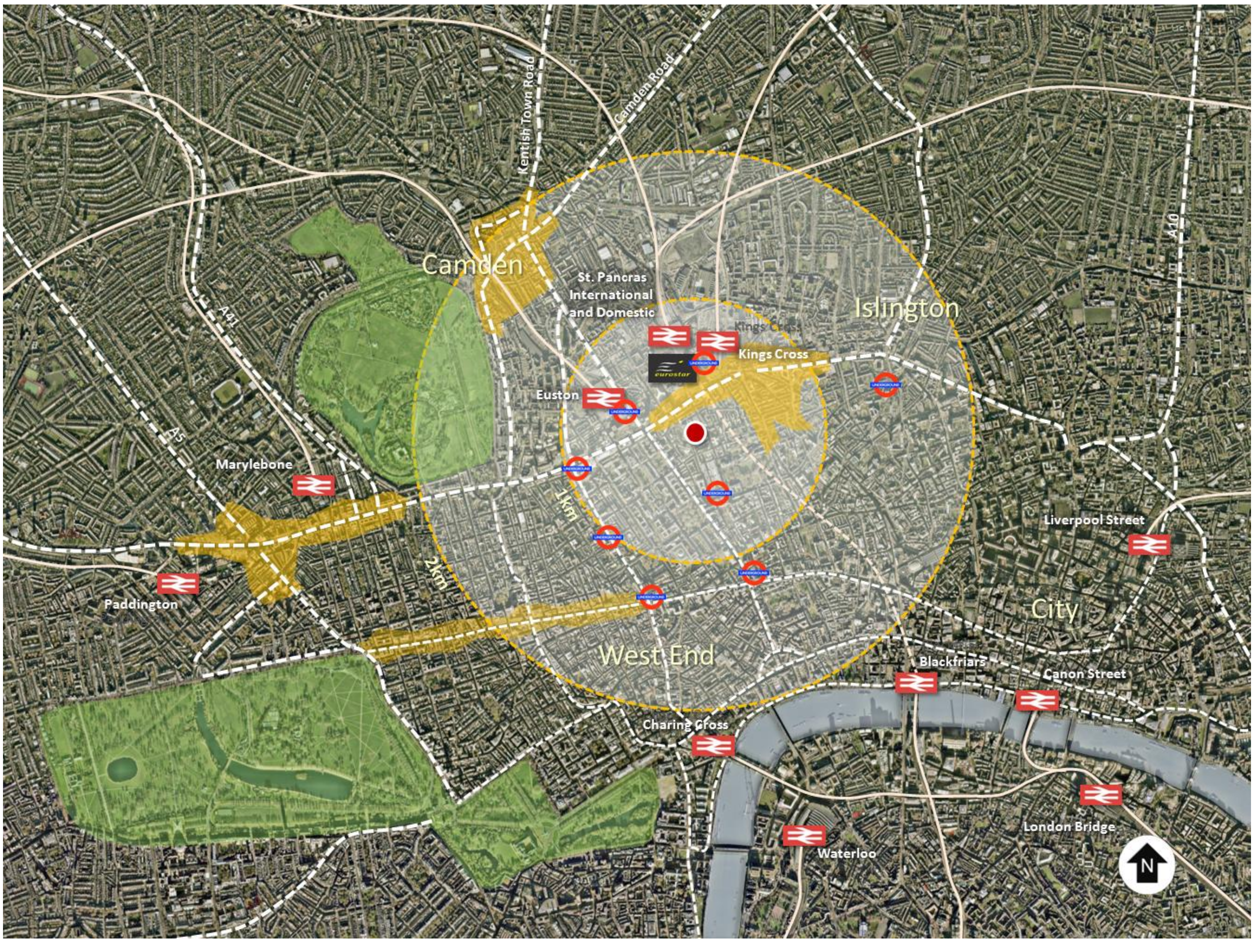
The greatest demand from students is for accommodation at short, preferably walking, distance from their colleges. This accords with Camden Council's policies to locate student housing in locations easily accessible by sustainable transport methods (walking, cycling and public transport).

As illustrated in Figure 4.1, the University's accommodation is centred around Bloomsbury and caters well for centrally located colleges, including the London School of Hygiene and

5.0 Why Garden Hall's

Tropical Medicine, The Royal Veterinary College and University College London amongst others. The majority also benefit from excellent public transport connections; Garden Halls have a public transport accessibility level of 6b (the highest) (see Figure 5.1 for transport links).

Figure 5.1: Public Transport Accessibility Map



Whilst the Garden Halls are located within the Bloomsbury Conservation Area, and Canterbury Hall is identified as a positive contributor, the overall benefits for redevelopment are significant and include opportunities to increase the level of student accommodation whilst enhancing the surroundings through high quality replacement buildings and associated improvements to the public realm. The rear of the site, along Sandwich Street, is underutilised and currently used as a car parking and back of house functions offering space for rationalisation.

The existing internal configuration of the Halls is such that, whilst adjacent, there is no access between the three individual Halls (Hughes Parry, Canterbury and Commonwealth). Proposals that seek to demolish the existing Halls, with the exception of the majority of Hughes Parry Tower, will facilitate a new solution that enables access through the site both for the benefit of students and operation of the building. This will enable consolidation of space required for operation and management of the Halls, and enable more space to be devoted to bed-spaces and communal facilities for the students.

In addition, as abovementioned, the redevelopment of Gardens Halls is timely as the accommodation is reaching the end of its economic life and in need of replacement and

5.0 Why Garden Hall's

refurbishment where it can be undertaken. The redevelopment proposals at the site seek to both enhance the quality and quantity of University's student accommodation.

5.3 Expressions of Interest

Seven colleges have already expressed an interest in taking a quota in any new Halls[18]. An anonymised summary is provided in Table 5.2 for five colleges which have submitted unqualified expressions of interest in a 35 year arrangement. A further two colleges have expressed interest:

- The sixth to take interest in between 600 – 1,000 beds (mostly on 40 week contracts) but wish to explore a range of possible terms;
- The seventh have expressed an interest in around 350 rooms but would be unwilling to commit to a long enough term.

Table 5.2: University of London Confirmed Expressions of Interest in Quotas for redevelopment Gardens Halls

		A	B	C	D	E	Total
Catered	40 weeks	100	40	30	-	-	**170**
Catered	50 weeks	100	20	-	-	-	**120**
Self-Catered	40 weeks	200	20	-	-	30	**250**
Self-Catered	50 weeks	200	20	70	100	25	**415**
Total		**600**	**100**	**100**	**100**	**55**	**955**

5.4 Proposed Rents for redevelopment Halls

In order to fund the long term investment in the Garden Halls and reflect the improved quality of accommodation, it is anticipated that rents on the site will rise. The University is still in the process of agreeing the revised rents for when the refurbished and redevelopment Halls are available (anticipated to be 2014/15 for Hughes Parry Tower and 2015/16 for the remainder of the scheme). Nevertheless, the University has estimated the proposed rent, inclusive of all-fees, to be in the region of:

- Self-catered Halls: £25 per night; and
- Catered Halls: £35 per night.

[18] At present the University of London allocate each collage an annual quotas, on a basis of an average of their % of their quota filled in the preceding 3 years. Most colleges take their whole quota each year.

5.0 Why Garden Hall's

Over an assumed maximum 40 week period this would equate to an annual rent of approximately £7,000 for self-catered and £9,800 for catered. Within the redevelopment proposals it is anticipated that 40% of accommodation will be self-catered and thus available at the lower rate. Thus, **the rents would continue to fall substantially below average private sector rates** of £10,833 as set out in Table 3.4. Thus, **the proposals enable the provisions of increased affordable student bed-spaces with high quality, intercollegiate halls that meet modern standards and requirements, priced below private sector, often unmanaged, accommodation**.

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6.0 Conclusion

In conclusion, this research has demonstrated the gap between current supply and demand of purpose built student accommodation in London, evidence of which has been subject to detailed examination in the London Plan EiP and is acknowledged in Mayoral policy. The London Plan takes a cautious estimate of a 18,000 – 27,000 shortfall in student bed-spaces whilst University of London evidence demonstrates this could be in excess of 34,000 bed-spaces.

Within the University of London federation there is a shortfall in its provision and when colleges' Halls quotas are full, students are eligible to apply for intercollegiate Halls. However, the University is unable to provide for all applicants, including first-years for whom the importance of purpose built student accommodation in their university selection is recognised. Indeed many of the figures presented within this note, do not capture potential demand from returning second and third students who are often deterred from applying by virtue of the known low likelihood of success in applications for intercollegiate halls.

The University takes a strategic approach to the management of its intercollegiate hall provision, and recognises the need to provide additional accommodation through a range of options. The redevelopment of its existing student accommodation is just one option available. A number of the University's Halls have been refurbished to expand capacity over the past ten years, and feasibility studies are underway in respect to those which have not recently been redeveloped.

The Garden Halls is part of an overall strategy to improve provision of affordable, purpose built student accommodation to enable the University and its affiliated colleges to remain an attractive and affordable option in an ever increasing higher education environment.

References

Greater London Authority (GLA)., 2010. Draft Replacement London Plan Examination in Public – Housing Technical Note. (See Appendix 4)

GLA., 2011. London Plan: Spatial Strategy for Greater London.

GLA., 2012. Housing Supplementary Planning Guidance.

Youth Sight (2012) Report for UPP: Student & Applicant Views on Accommodation. (see Appendix 7)

Youth Sight (2012) The Student Experience: A Report Commissioned by UPP. (See Appendix 7).

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APPENDICES

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Appendix 1 – Location of University of London College Campuses

University of London College Campus Locations

College	Main Campus Address	Borough
0127 Birkbeck College	Malet St Bloomsbury, London WC1E 7HX	London Borough of Camden
0188 The Institute of Cancer Research	15 Cotswold Rd Belmont, Sutton, Surrey, SM2 5NG	London Borough of Sutton
0010 Central School of Speech and Drama	Embassy Theatre 62-64 Eton Ave, London, Greater London NW3 3HY	London Borough of Camden
0201 Courtauld Institute of Art	Somerset House Strand, London, Greater London WC2R 0RN	London Borough of Westminster
0131 Goldsmiths College	University of London, New Cross, London, SE14 6NW	London Borough of Lewisham
0205 Heythrop College	University of London Kensington Square London W8 5HN	Royal Borough of Kensington and Chelsea
0133 Institute of Education	20 Bedford Way London WC1H 0AL	London Borough of Camden
0134 King's College London	The Strand, London, WC2R 2LS	London Borough of Westminster
0135 London Business School	26 Sussex Pl, London NW1 4SA	London Borough of Westminster
0151 University of London (Institutes and activities)	Senate House, Malet Street, London WC1E 7HU	London Borough of Camden
0137 London School of Economics and Political Science	Houghton Street, London, WC2A 2AE	London Borough of Westminster
0138 London School of Hygiene and Tropical Medicine	Keppel Street, London, WC1E 7HT	London Borough of Camden
0139 Queen Mary and Westfield College	Mile End Road, London, E1 4NS	London Borough of Tower Hamlets
0033 Royal Academy of Music	Marylebone Road, London, NW1 5HT	London Borough of Westminster
0141 Royal Holloway and Bedford New College	Egham Hill, Egham, Surrey, TW20 0EX	Runnymede Borough Council
0143 The Royal Veterinary College	Royal College Street London, NW1 0TU	London Borough of Camden
0145 St George's Hospital Medical School	Cranmer Terrace, Tooting London, SW17 0RE	London Borough of Wandsworth
0146 The School of Oriental and African Studies	Thornhaugh Street Russell Square, WC1H 0XG	London Borough of Camden
0149 University College London	Gower Street, London WC1E 6BT	London Borough of Camden

Appendix 2 – University of London Intercollegiate Halls College Quota 2012/13

FINAL QUOTA 2012-13

	COLLEGE HALL	CONNAUGHT HALL	GARDENS HALLS	INT HALL SSB	INT HALL SS	INT HALL DS	LILLIAN PENSON HALL	NUTFORD HOUSE	TOTAL
Birkbeck College	6	6	11	12	2	4	12	6	59
The Institute of Cancer Research	0	0	0	0	0	0	0	0	0
Central School of Speech and Drama	0	0	0	5	0	2	6	20	33
Courtauld Institute of Art	4	4	4	4	0	1	0	0	17
Goldsmiths College	0	0	6	4	0	0	0	0	10
Heythrop College	0	0	4	0	0	0	0	22	26
Imperial College London	0	0	1	1	0	0	0	1	3
Institute of Education	0	0	7	0	0	0	13	0	20
King's College London	99	64	289	116	9	43	68	54	742
London Business School	4	0	0	4	0	5	36	0	49
School of Advanced Study - University of London	0	4	0	4	0	1	4	0	13
London School of Economics and Political Science	44	32	158	59	4	20	25	23	365
London School of Hygiene and Tropical Medicine	0	4	0	6	1	2	18	0	31
Queen Mary and Westfield College	11	10	39	15	1	8	30	11	125
Royal Academy of Music	0	0	0	4	0	2	4	20	30
Royal Holloway and Bedford New College	4	0	0	4	0	1	6	0	15
The Royal Veterinary College	6	10	35	18	0	0	0	0	69
St George's Hospital Medical School	0	0	0	0	0	0	0	0	0
The School of Oriental and African Studies	25	20	65	28	2	9	21	0	170
University College London	114	74	357	143	11	50	70	65	884
	317	228	976	427	30	148	313	222	
TOTAL	317	228	976	427	30	148	313	222	2661

Appendix 3 – University of London Response to London Housing SPG EiP (February 2012)

University of London
Senate House
Malet Street
LONDON WC1E 7HU

Tel: +44 (20) 7862 8011
Web: www.london.ac.uk

Andrew Barry-Purssell
Head of London Plan
Greater London Authority
City Hall
More London
The Queen's Walk
London SE1 2AA

23 February 2012

Dear Mr Barry-Purssell,

Draft Housing Supplementary Planning Guidance

I am writing with regard to the draft supplementary planning guidance on behalf of Colleges from the University of London Federation. The University of London consists of 18 self governing Colleges and 10 specialist research Institutes. The combined intake of all constituent Colleges was over 120,000 students in 2011.

A list of Colleges belonging to the Federation is contained in the attached annexe to this letter.

The need for purpose built student accommodation

The draft housing supplementary planning guidance (section: 3.1.48) refers to an estimated need for between 18,000-27,000 additional bed-spaces between now and 2021.

We welcome recognition of the need for universities to provide managed accommodation for their students. Our view is that this is a considerable advance on the previous London Plan. Nevertheless, we consider the figures themselves to be a gross underestimate of actual demand, since they do not take into account the existing shortfall in supply. London is the most acutely undersupplied city in the UK for student accommodation.

Location of new student accommodation

One aim of the London Plan is to reduce pressure on the private rented sector through encouraging the growth of purpose built student accommodation.

> *"New provision may also reduce pressure on other elements of the housing stock currently occupied by students, especially in the private rented sector."*

Policy 3.52, The London Plan

In order for this policy to be effective, provision of new purpose built student accommodation must consider the balance between location and price on where students are currently choosing to live in the HMO rented sector. This does not appear to be taking place when local authorities are drafting their Local Development Frameworks.

In order for this policy to be effective, provision of new purpose built student accommodation must consider the balance between location and price on where students are currently choosing to live in the HMO rented sector. This does not appear to be taking place when local authorities are drafting their Local Development Frameworks

> *"Higher Education institutions need to work with boroughs at the earliest opportunity over planning future developments…. yet (these institutions) have a wider sphere of operation than a single borough."*

Policy 3.107, The London Plan

It is imperative that boroughs follow the existing guidance and take a London wide approach when considering applications for purpose built student housing (rather than simply looking at where Higher Education Institutions are located).

In practice, it appears that many local authorities are not following this guidance. We are especially concerned at restrictive student housing policies in a number of London boroughs. We concur with a University of London Housing Services report that new provision should be within 30 minutes travelling time of the College that students are attending.

The need for affordable purpose built student accommodation

The University of London Housing Services and the Higher Education Institutions (HEIs) named below made submissions to the Examination in Public regarding student housing.

- Imperial College London
- King's College London
- London School of Economics and Political Science
- University College London
- University of the Arts London
- University of Westminster

There was unanimity of support amongst all submissions from the London Higher Education sector (including the NUS), for the original London Plan approach to ensure planning agreements were conditional on occupation agreements with specified educational institutions.

> *"This will ensure that universities are actively involved in the preparation of schemes, to ensure that they are of good quality and can be made available at affordable prices."*

University submission to EiP

It is very disappointing that this policy was withdrawn, leaving universities with very little influence over the housing being built for their students by private developers. With the shortfall in purpose built student accommodation in London being so acute, direct let private developers have been able to benefit from growth in the Higher Education sector by targeting their provision towards the top end of the rentals market.

"The difference in annual rents is even more striking, with the median annual rent within the private sector at £8,849, much higher than the median university rent of £4,549."

DTZ, London student accommodation[1]

By contrast, the aim of the higher education sector is to ensure the provision of sufficient, affordable student housing. Whilst admissions policies vary, most HEIs in London are unable to accommodate all first year undergraduates in their own accommodation. As the costs associated with studying in the UK continue to increase, a lack of affordable accommodation in London could adversely impact on our ability to attract the most able candidates both from within the UK and around the world.

Anecdotal evidence suggests that a high proportion of voids are tolerated in direct let student blocks, as the costs are covered by the higher rents. This may make sense economically but, in planning terms, there seems to be little benefit in provision of student accommodation which remains unoccupied due to the rents being charged. This is particularly so when universities are receiving up to three applications for each available university managed bed-space.

Consequently we do not agree that the provision of affordable student accommodation is best left to the market.

We urge London local authorities and the Mayor's Office to recognise the economic, cultural and social significance of the Higher Education sector to the capital as well as the living costs for students of studying here. London is competing nationally and internationally for the most talented students and an important consideration in their decision on where to study is the affordability of student housing. The current planning framework and the lack of affordable student housing, mean London HE Institutions are being disadvantaged when compared with other cities, both in the UK and internationally.

Student Housing Forum

To enable universities to regain influence over the housing being provided to their students, there needs to be an effective student housing forum. One of its first priorities will be to address issues regarding the affordability and location of new purpose built student accommodation. We also believe that a forum will provide universities with the opportunity to impress on local authorities the current and potential social and economic contribution they make towards local communities and London as a whole.

We welcome the suggested agenda items for the forum contained in the Draft Housing Supplementary Planning Guidance, and note that the Mayor is committed to providing strategic support to this forum.

We have, however, yet to see any concrete proposals as to how this forum will be established or convened coming from the Mayor's Office. Therefore we support the

[1] http://www.dtz.com/UK/Media_Centre/Latest_news/London+student+accommodation

framework being suggested by University of London Housing Services, towards establishing the forum.

We understand that their suggestions are also being supported by the following:

- NUS
- London Higher
- Association of University Directors of Estates, London region
- Cass and Claredale

If you have any queries in relation to the above, please contact Alex Bussey (alex.bussey@london.ac.uk, or 020 7862 8048) in the Vice-Chancellor's Office in the first instance.

Yours sincerely,

Chris Cobb
Chief Operating Officer
chris.cobb@london.ac.uk

Annexe

Colleges and Institutes of the University of London

- Birkbeck, University of London
- The Central School of Speech and Drama
- Courtauld Institute of Art
- Goldsmiths, University of London
- Heythrop College
- The Institute of Cancer Research
- Institute of Education
- King's College London
- London Business School
- The London School of Economics and Political Science
- London School of Hygiene and Tropical Medicine
- Queen Mary, University of London
- Royal Academy of Music
- Royal Holloway, University of London
- The Royal Veterinary College
- St George's, University of London
- School of Advanced Study
- The School of Oriental and African Studies
- UCL

Appendix 4 – Draft Replacement London Plan EiP Housing Technical Note

August 2010

The London Plan
Spatial Development Strategy for Greater London

Draft Replacement London Plan
Examination in Public

Housing Technical Note

Mayor of London

Contents

Part 1 - Introduction to the technical note

1.1 Chapter 3 of the draft replacement London Plan (DRLP) deals, among other things, with a range of matters related to housing. Although these relate to what is perhaps one of the most fundamental questions in town planning – where will people live? – they draw on a great deal of detailed and quite technical background information and evidence set out across a number of technical documents.

1.2 This technical note is intended to assist participants in the DRLP Examination in Public discussions on matters 3B-H by summarising and drawing together the most important aspects of this background material and evidence base in a more accessible format. It provides detail and supporting information for the Mayor's written statements on these matters.

Part 2 – Housing Supply

Introduction

2.1 The Mayor now proposes an annual additional homes target in London of 32,250 between 2011-2021. The target setting was informed by the Strategic Housing Market Assessment (SHMA)[1], which provides a need figure of 32,600 additional homes per annum, and the 2009 Strategic Housing Land Availability Assessment/Housing Capacity Study (SHLAA/HCS) capacity based figure of 37,000 additional homes per year (which has the potential of being over 41,000 additional homes between 2011-2021 if assumed site constraints are overcome and higher densities are implemented).

2.2 This section of the technical paper explains how the results of the SHLAA/HCS have informed the Mayor's decision making on target setting and how the SHLAA/HCS result of 37,000 was translated into the proposed DRLP housing target of 32,250. It also explains the potential additional capacity of 4,000 homes which could be realised over the plan period. The corrections which the Mayor has taken account of in reducing the original proposed target of 33,380 to 32,250 will also be explained.

2.3 This should be read alongside:

- the SHLAA/HCS 2009 report of study[2], particularly what it says about the methodology used and its consistency with PPS3 requirements[3] and its associated guidance on carrying out a SHLAA[4];
- the Mayor's draft Housing SPG 2010[5];
- the Mayor's EiP written statements for housing matters (matters 3B-3H)[6]; and the studies which support the Mayor's approach to setting targets[7].

2.4 This section concludes with a brief discussion of the future spatial pattern of housing in London over the plan period. The geographical distribution of housing targets will be discussed and explored against the wider priorities of the DRLP and existing pattern shown in the 2008 London Plan.

[1] **LD11 -**Mayor of London. Strategic Housing Market Assessment 2008. ORS/GLA 2009
PPS 3 Para 33 required targets to be informed by needs assessments. The London SHMA was carried out rigorously, in line with government guidance. Annex 1 to the present section of this Technical Note shows how the London SHMA addresses national guidance on the preparation of SHMA.
[2] **CD07 -**Mayor of London. Strategic Housing Land Availability Assessment and Housing Capacity Study 2009. GLA, 2009
[3]**GD15 -** Communities and Local Government. Planning Policy Statement 3 Housing. CLG, 2010 Annex C
[4] **GD38-**Communities and Local Government. SHLAA practical guidance. CLG, 2007
[5] Mayor of London. Draft Housing SPG 2010. GLA, 2010
[6] Mayor of London EiP matter written statements 3B-3H
[7] **LD86 –** Atkins/BNP Paribas. Strategic Housing Land Availability Assessment and Housing Capacity Study Viability Assessment. GLA, 2010 and **RD01 -** GVA Grimley. Draft London Housing Design Guide: Cost and Delivery Impact Assessment – Pre Publication Draft. LDA, GLA and HCA, 2010

The Strategic Housing Land Availability Assessment and Housing Capacity Study 2009

2.5 The London Strategic Housing Land Availability Assessment and Housing Capacity Study 2009 (SHLAA/HCS) sought to:

- identify sites in London over 0.25 hectares with a potential for housing; and
- consider their housing potential; and assess when they are likely to be development during the life of the draft replacement London Plan.

It also sought to take account of trends in small housing sites (<0.25ha) and non-self contained accommodation, and made assumptions on the returning of London term vacant properties back into use.

2.6 The SHLAA/HCS was shaped by then current PPS3[8] requirements and associated guidance[9] for undertaking SHLAA. It also drew on London's long experience in carrying out joint strategic/local housing capacity studies which in their last iteration at least, anticipated the previous Government's guidance in PPS3 to a considerable extent .

2.7 To ensure that the most robust outcome was achieved in London's distinct circumstances[10], the SHLAA/HCS (and the SHMA) were undertaken at regional rather than the local or sub regional levels suggested in national guidance. This is because even though there is considerable local variation in the London housing market, it has little regard to borough boundaries[11]. It is therefore most effectively addressed as a single 'sub-region' or 'single housing market area' in the terms of PPS3[12] – a point acknowledged during previous London Plan Examinations in Public[13]. PPS3 is also relevant to London in stressing the need for close stakeholder working to identify capacity to meet future requirements – a position which coincidentally builds on London's long established approach. The SHLAA/HCS was guided by a steering group which included representatives of the house builders, boroughs, government, the National Housing and Planning Advice Unit (NHPAU), Royal Institution of Chartered Surveyors and other stakeholders

2.8 The SHLAA/HCS report of study[14] demonstrates how it refined the national approach[15], to more effectively address London's distinct circumstances while still following PPS3 requirements[16] to:

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[8] **GD15 -** Communities and Local Government. Planning Policy Statement 3 Housing. CLG, 2010
[9] **GD38-**Communities and Local Government. SHLAA practical guidance. CLG, 2007
[10] The preparation of the housing targets effectively addresses London unique circumstances in which the housing market has little regard to boroughs boundaries and unlike the rest of the country, over 96% of housing comes from brownfield sources.
[11] **LD92 -** Draft Early Alterations to the London Plan. Examination in Public 2006. Panel Report. Mayor of London, 2006. See the joint statement on Strategic Housing Market Assessment in London by Government Office for London, the Greater London Authority and London Councils: http://www.london.gov.uk/mayor/planning/docs/shmas.pdf
[12] **GD77 -** CLG Identifying sub-regional housing market areas. Advice Note. CLG, 2007 http://www.communities.gov.uk/documents/planningandbuilding/pdf/323693.pdf
[13] **LD92** op cit, Chapter 1
[14] **CD07 -**Mayor of London. Strategic Housing Land Availability Assessment and Housing Capacity Study 2009. GLA 2009
[15] **GD38-**Communities and Local Government. SHLAA practical guidance. CLG, 2007 Para 15
[16] **GD15 -** Communities and Local Government. Planning Policy Statement 3 Housing. CLG, 2010 Annex 3

1. assess the likely level of housing that could be provided if unimplemented planning permissions were brought into development;

2. assess land availability by identifying areas including previously developed /greenfield land/mixed use development that have development potential;

3. assess the potential level of housing on identified land;

4. where appropriate, evaluate past trends in windfall land and estimated likely future implementation rates;

5. identify constraints that might make sites unavailable/unviable;

6. identify sustainability issues and constraints that might make sites unsuitable; and

7. identify the actions that could overcome constraints.

2.9 The SHLAA/HCS dealt with points 1-3 by identifying the capacity and likely phasing of some 1,300 individual sites of more than 0.25 ha which have unimplemented planning permissions or are allocated for housing in development plans or are otherwise publicly identified by boroughs as having housing potential. These account for 75% of overall provision identified in the DRLP target.

2.10 To address points 2 and 4 more rigorously than is possible in a conventional windfall assessment, 1,200 other sites which might have housing potential were identified. This is particularly important in London because of its uniquely vibrant land market, where 96% of housing capacity comes from brown field sites and where the significant churn in the use of land, especially over the twenty year term of the Plan means that many potential future housing sites are currently in other active uses, sometimes protected by current planning policies. In this context, and to address points 5, 6 and 7, a range of policy criteria e.g. Green Belt, Metropolitan Open Land, Strategic Industrial Land designations, and development constraints e.g. contamination, flood risk, ownership issues, together with an assessment of measures which might address these constraints, were used to estimate their nominal capacity and probability of coming forward for housing in five phases between 2007 - 2031. Individual details of the potential sites have not been published because they were used only to generate an aggregate, probability based estimate of capacity likely to come forward from hitherto unidentified sites. They therefore do not constitute identified capacity in the same way as that published by SHLAAs outside London. They account for 25% of overall provision identified in the DRLP target.

2.11 In line with the requirements of point 2 , both identified and potential sites included previously developed and green field land and mixed-use development, where boroughs felt these sites had a housing potential.

2.12 Point 4 is further addressed by the SHLAA/HCS approach to sites of less than 0.25 ha.

2.13 Initial aggregated output for both small and individual large sites was generated by the agreed SHLAA/HCS methodology and then, in line with PPS 3 requirements, tested by the GLA and individual boroughs. Issues of principle were resolved through the study steering group. Though the results of the SHLAA/HCS are also designed to be used by boroughs in addressing their own requirements, for the purposes of deriving the DRLP housing targets, the methodology's 'point in time' principle has been followed i.e. changes proposed after August 2009 have not been accepted unless they could be rigorously justified. The only exceptions to this principle were changes made to correct technical errors and inaccuracies in the sites database (See Para 2.20).

The SHLAA/HCS 2009 outputs, supporting studies and relationship with housing need

2.14 The SHLAA/HCS 2009 evidence base suggests that London may have the theoretical potential housing capacity of over 41,000 homes per annum[17]. While this is based on overcoming assumed site constraints and implementing densities at ¾ to the top of London Plan density matrix, the more rigorous and conservative approach taken in the SHLAA/HCS methodology suggested that 37,000 per annum was a prudent starting point.

2.15 The potential theoretical capacity of at least 4,000 additional homes per annum beyond the 37,000 starting point can be assumed from two main sources: Firstly, 2,000 to 2,500 units per annum could be realised from the difference between the 'constrained' and 'unconstrained' capacities over the 10-year period to 2021. This difference takes account of reducing site constraints through the development process (including the benefits of larger scale development and planning frameworks, and the potential to absorb the costs of mitigating constraints). Secondly, higher densities could be assumed on sites over and above the SHLAA/HCS's density assumptions (which is based on the mid point of the London Plan density matrix). Using the results of the scenario testing in Annex 4 of the SHLAA/HCS report of study, around 4,000[18] additional units per annum could be realised by adjusting the densities of all potential housing sites to the top of the relevant range. However, taking account of the Mayor's aspiration in Policy 3.4 of the DRLP to optimising housing potential and a consideration of historical average densities across London, it would not be prudent to assume higher densities across the broad. Therefore, a rough assumption was made that assumes no more than 50% of the potential sites assessed in the SHLAA/HCS may come forward with densities at the upper end of the density matrix, which could yield additional capacity of up to 2,000 units per annum.

[17] **LD86 –** Atkins/BNP Paribas. Strategic Housing Land Availability Assessment and Housing Capacity Study Viability Assessment. GLA, 2010 and **RD01 -** GVA Grimley. Draft London Housing Design Guide: Cost and Delivery Impact Assessment – Pre Publication Draft. LDA, GLA and HCA, 2010.
[18] The difference between 37,000 and the 41,154 that was derived in Scenario H of Annex 4 of the SHLAA/HCS report of study - **CD07 –**Op Cit

2.16 The capacity to accommodate an average of some 37,000 additional homes per annum from 2011-2021 is based on the constraints based probability model[19] which applied a full range of policy and physical development constraints identified in the study and took a consistent approach in taking the mid point of relevant density ranges of the London Plan density matrix for potential sites. The potential for over 4,000 units per annum in addition to this was never intended to be considered on a site by site basis, but is intended to provide an indication of the potential capacity 'buffer' should sites in the SHLAA/HCS not come forward as identified, and to take account of future impacts on housing delivery (including changes in policy priorities and market uncertainties). .

2.17 The annual 37,000 capacity figure was in fact reduced by 1,074 units[20] through the SHLAA/HCS process to take account of the Mayor's commitment to supporting boroughs in protecting the loss of garden land through the development process, where local evidence shows this can be justified. This reduction, which is based upon reducing 90% of total garden land development from 2004-2007 for all boroughs, is supported by Government's recent changes to classification of previously development land[21]. The pan London capacity figure of 37,136 was thus reduced to 36,062. Further refinement was made to help inform target setting in view of concerns that the past trends used to derive small sites estimates represented a period of particular buoyancy in the London housing market. With this in mind, the trend was extended to cover a longer period (2000 – 2007) rather than the original trend of 2004-2007. The effect of this was a reduction in assumed capacity to 33,380 additional homes per year as a basis to underpin the Mayor's housing provision targets.

2.18 Given the market uncertainties that have existed since 2008, consideration was also given to government's suggestion that the level of regional housing provision should be 'broadly illustrated in a housing delivery trajectory[22]'. However, as the SHLAA/HCS study report notes[23] this approach "could produce an outcome of such complexity and uncertainty that it might compromise the basic purpose of government and the Mayor in setting targets to increase housing output to meet Londoners' housing needs'.

2.19 This basic purpose was much better served by taking housing need (some 33,000 pa) as the benchmark for setting the target as outlined in PPS3[24]. After

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[19] **CD07 -**Mayor of London. Strategic Housing Land Availability Assessment and Housing Capacity Study 2009. GLA 2009 Section 3 and Para 3.28 - the study system is designed to generate a housing probability based on the number of constraints that might affect a site being developed for housing. The system then combines the calculated capacity with the probability of site being developed for housing, to generate the assumed 'Constrained' housing capacity for the site. On aggregate these identified constrained capacities provide estimates of large site housing capacity at borough, sub-regional and regional levels.

[20] **CD07 -**Mayor of London. Strategic Housing Land Availability Assessment and Housing Capacity Study 2009. GLA, 2009 Section 3 and Para 3.53

[21] On 9 June, the Department of Communities and Local Government announced two changes to PPS3 - both with immediate effect. The first of these is the redesignation of domestic garden land so that it is no longer regarded as previously developed land (brownfield land or PDL). The second is the scrapping of the minimum density target.

[22]**GD15 -** Communities and Local Government. Planning Policy Statement 3 Housing. CLG, 2010 Para 34

[23] **CD07 -**Mayor of London. Strategic Housing Land Availability Assessment and Housing Capacity Study 2009. GLA, 2009 Para 7.11

[24] **GD15 -** Communities and Local Government. Planning Policy Statement 3 Housing. CLG, 2010 Para 33

factoring in the uncertainties of identifying capacity beyond 10 years in London's unique circumstances, this figure approximated to that produced by a broad translation of the SHLAA/HCS capacity ranges to a robust strategic provision target. In light of the uncertainties around deliverability and the emphasis which both government[25] and the Mayor place on meeting need, together with his concerns to secure quality of output, it provides a prudent and realistic basis for setting borough housing provision targets.

2.20 The Mayor was conscious that at the time of finalising the target for consultation, full account might not have been taken of the possible impact of his proposed new housing standards on this figure, or of the results of a different approach to that used to assess viability in the SHLAA/HCS. Independent assessments of these were therefore undertaken to test the robustness of the SHLAA/HCS. These were based on actual proposed developments, and were therefore drawn from housing proposals which may not be directly comparable with the conservative site assumptions made in the SHLAA/HCS (i.e. these proposals may not have passed the theoretical SHLAA/HCS policy and physical constraints tests for 'potential' sites.). It was therefore deemed more appropriate for the results of these assessments to be applied to the 'unconstrained' capacity figure of at least 41,000 rather than the 37,000 'constrained' figure. The site viability assessment (which also incorporated the potential results of the proposed housing standards cost and delivery impact assessment[26]) suggested that output might be reduced by some 3,692 to 7,008 pa - a reduction which, fell within the aggregate of the reductions already taken into account in reaching the 32,250 proposed London wide target, with the expectation that any viability issues could be addressed through site by site implementation (either overcoming some of the site constraints identified in the SHLAA/HCS or by increasing density within the relevant range outlined in the London Plan density matrix).

Target setting - from 33,380 to 32,250 additional homes per annum - and a commitment to review

2.21 Since the publication of the proposed housing targets in the draft replacement London Plan, a small number of errors and inaccuracies have been identified by some boroughs through the draft replacement Plan consultation. The SHLAA/HCS 2009 provides the necessary flexibility to take account of errors and inaccuracies where boroughs have identified them, providing the borough justifies an amendment to the housing targets with specific evidence. The Mayor has agreed that the EiP Panel should be asked to recommend that the relevant individual borough targets should be amended as appropriate. The result of this is a proposed pan London housing target of 32,250 additional homes per annum which is considered realistic, deliverable, robust and achievable. Table 2.1 below shows how the inaccuracies and errors have affected the housing targets as proposed in Table 3.1 of the DRLP.

[25]**GD15 -** Communities and Local Government. Planning Policy Statement 3 Housing. CLG, 2010 Para 33
[26] To minimise double counting the viability assessment took into account implementation of the design standards

2.22 The announcement on the 6th July 2010 from the Secretary of State[27] and the subsequent statement presented at the Examination in Public[28] - removing the requirement set out in PPS3 for the Mayor to set housing target for London boroughs - have given the Mayor the necessary flexibility to consider more carefully the comments from boroughs and other respondents to the plan on the appropriateness of setting housing targets. Coupled with other policies rather than as an end in themselves, targets are a valuable part of the Mayor's armoury to address need in a city as large and complex as London. That does not mean that he considers the current methodology for developing the targets to be the most effective way forward for the future – this methodology reflects historic, blanket, national guidance which in several instances constrained boroughs and the GLA from taking proper account of London's unique circumstances. The Mayor is therefore committed to working with boroughs and other stakeholders to develop a more effective methodology which will respect these distinct circumstances and produce output for a new target which will better help London tackle its housing needs through a future alteration to the London Plan. The Mayor commits to a review of the housing targets which will be brought forward as an early alteration to the London Plan.

Table 2.1 - Amended DRLP proposed housing provision targets[29]

Borough target	Minimum ten year target	Annual monitoring
Barking and Dagenham	**10,650 ~~15,100~~**	**1,065 ~~1,510~~**
Barnet	22,550	2,255
Bexley	3,350	335
Brent	10,650	1,065
Bromley	**5,000 ~~5,650~~**	**500 ~~565~~**
Camden	6,650	665
City of London	1,100	110
Croydon	13,300	1,330
Ealing	8,900	890
Enfield	5,600	560
Greenwich	25,950	2,595
Hackney	11,600	1,160
Hammersmith and Fulham	6,150	615
Haringey	8,200	820
Harrow	3,500	350
Havering	**9,700 ~~12,350~~**	**970 ~~1,235~~**
Hillingdon	**4,700 ~~6,200~~**	**470 ~~620~~**
Hounslow	4,750	470
Islington	11,700	1,170
Kensington and Chelsea	5,850	585

[27] **ED02** - Letter from Rt. Hon. Eric Pickles regarding abolition of Regional Strategies.
[28] **ED43 –** Statement to the EiP from Rt Hon Eric Pickles MP
[29] This will appear in a new Schedule of changes to inform the second part of the examination.

Kingston	3,750		375	
Lambeth	**11,950**	~~**12,550**~~	**1,195**	~~**1,255**~~
Lewisham	11,050		1,105	
Merton	3,200		320	
Newham	25,000		2,500	
Redbridge	7,600		760	
Richmond	2,450		245	
Southwark	20,050		2,005	
Sutton	2,100		210	
Tower Hamlets	28,850		2,885	
Waltham Forest	7,600		760	
Wandsworth	**11,450**	~~**12,800**~~	**1,145**	~~**1,280**~~
Westminster	7,700		770	
London Total	**322,500**	~~**333,800**~~	**32,250**	~~**33,380**~~

The distribution of London's future housing supply

2.23 The geographical distribution of housing targets at both broad structural and individual borough levels is not dissimilar to that shown in the 2008 London Plan.

2.24 The distribution and incremental changes at structural level reflect broad policy objectives. Thus, the contribution of inner and outer London is expected to remain the same as the current contribution in the 2008 London Plan.

2.25 Table 2.2 below shows the sub regional distribution of new provision:

Table 2.2 – Percentage share of the housing target by sub region

Sub region	% Share of New proposed Housing target
North	11
South	12
East	43
West	12
Central	20

2.26 The substantial contribution from East London reflects both its development potential and the priority that the Mayor and government attach to its regeneration. The challenge will be to ensure that the social, environmental and physical infrastructure proposed in this Plan is brought forward to ensure that growth of this scale is sustainable in the broadest sense. The SHLAA/HCS shows that 42% of London's larger sites (with capacity for more than 200) are concentrated here, providing not just opportunities for innovative design to create new lifetime neighbourhoods but also careful integration with established and sometimes deprived communities

2.27 Accommodating growth in the remaining 'outer' sub-regions does of course require supporting infrastructure but relative to the Thames Gateway parts of East London it can also raise a different set of local planning issues. Not only is growth limited by extensive 'green' designations and an often constrained stock of surplus industrial and institutional land, but development opportunities are generally on a smaller scale. Part may be accommodated close to established, relatively low-density areas, requiring particularly sensitive local planning and community engagement. This underscores the importance of meeting housing needs in and around town centres where there is scope for higher density development to meet housing need. The Plan's flexible approach to optimising development at the appropriate density will be essential to this.

2.28 Central London continues to be a significant contributor to overall provision. As well as the need for supporting infrastructure, a key issue here is managing growth in what is already London's most densely developed sub region and one which is home to some of London's most excluded communities. The Plan's environmental and housing quality policies will be crucial to this and to ensuring that existing residents benefit from the area's growth. As the Plan acknowledges, in 2008 2,100 homes were completed in the CAZ.

2.29 At borough level Tower Hamlets, Greenwich, Newham and Barnet continue to have the highest level of anticipated growth, with large sites making a particularly significant contribution. This underscores the importance of preparing effective planning and opportunity frameworks to ensure that it produces truly sustainable new neighbourhoods. At the other end of the scale the City of London, Richmond, Sutton and Merton are expected to have the lowest level of provision. The Plan recognises the distinct issues facing housing provision in the City but provides more generic policies to enable the other, lower density boroughs to optimise development in light of their local circumstances.

Annex 1

Excerpt from London SHMA on conformance with government guidance

What Is A Strategic Housing Market Assessment?

1.1 Strategic Housing Market Assessments (SHMAs) are a crucial part of the evidence base informing policy and contributing to shaping strategic thinking in housing and planning. They were introduced as the required evidence base to support policies within the framework introduced by Planning Policy Statement 3 (PPS3) in November 2006.

> *Strategic Housing Market Assessments and Strategic Land Availability Assessments are an important part of the policy process. They provide information on the level of need and demand for housing and the opportunities that exist to meet it*

1.2 SHMAs work at three levels of planning:

Regional

- Developing an evidence base for regional housing policy.
- Informing Regional Housing Strategy reviews.
- Assisting with reviews of Regional Spatial Strategies (Spatial Development Strategy in London).

Sub regional

- Deepening understanding of housing markets at the strategic (usually sub regional) level.
- Developing an evidence base for sub regional housing strategy.

Local

- Developing an evidence base for planning expressed in Local Development Documents.
- Assisting with production of Core Strategies at local level.

1.3 Alongside PPS3, Practice Guidance for undertaking Strategic Housing Market Assessments was published by the Department for Communities and Local Government (CLG) in March 2007 and subsequently updated with a minor revision in August 2007.

1.4 The Guidance gives advice regarding the SHMA process and sets out key process checklist items for SHMA Partnerships to follow. These checklist items are important, especially in the context of supporting the soundness of any Development Plan Document:

> *In line with PPS12, for the purposes of the independent examination into the soundness of a Development Plan Document, **a strategic housing market***

***assessment should be considered robust and credible if, as a minimum, it provides all of the core outputs and meets the requirements of all of the process criteria in figures 1.1 and 1.2**. (Page 9)*

1.5 The core outputs and process checklist required of an SHMA to demonstrate robustness are detailed below.

Figure 1
CLG SHMA Practice Guidance Figure 1.1 – Core Outputs

	Core Outputs
1	Estimates of current dwellings in terms of size, type, condition, tenure
2	Analysis of past and current housing market trends, including balance between supply and demand in different housing sectors and price/affordability. Description of key drivers underpinning the housing market
3	Estimate of total future number of households, broken down by age and type where possible
4	Estimate of current number of households in housing need
5	Estimate of future households that will require affordable housing
6	Estimate of future households requiring market housing
7	Estimate of the size of affordable housing required
8	Estimate of household groups who have particular housing requirements e.g. families, older people, key workers, black and minority ethnic groups, disabled people, young people

Figure 2
CLG SHMA Practice Guidance Figure 1.2 – Process Checklist

	Process Checklist
1	Approach to identifying housing market area(s) is consistent with other approaches to identifying housing market areas within the region
2	Housing market conditions are assessed within the context of the housing market area
3	Involves key stakeholders, including house builders
4	Contains a full technical explanation of the methods employed, with any limitations noted
5	Assumptions, judgements and findings are fully justified and presented in an open and transparent manner
6	Uses and reports upon effective quality control mechanisms
7	Explains how the assessment findings have been monitored and updated (where appropriate) since it was originally undertaken

1.6 The following sections describe the process undertaken in delivering the Greater London study and identify where the required core outputs are provided within the study report.

Satisfying the Process Checklist

1. Approach to identifying housing market area(s) is consistent with other approaches to identifying housing market areas within the region.

1.7 Having regard to PPS3 and the CLG advice note on identifying sub-regional housing market areas, the Government Office for London (GOL), the Greater London Authority (GLA) and London Councils agreed in a joint statement in March 2008 that the London region represents an appropriate spatial level of analysis for understanding housing markets as well as enabling a co-ordinated approach to evidence base work and policy-making across the region.

1.8 The Greater London SHMA was commissioned with reference to the administrative boundaries of the region – but through the use of a range of secondary data sources, provided an appropriate context for the region's data in relation to the rest of England. The key focus of the study is to estimate the overall level and mix of housing required, while setting the London housing market in the context of other UK regions.

1.9 It is recognised that the region-wide SHMA is unlikely to provide the necessary focus on local issues that may be required for developing housing policies in individual boroughs. Therefore, in parallel with the regional work, there is an expectation that the housing sub-regions will each produce their own HMA at a sub-regional level.

2. Housing market conditions are assessed within the context of the housing market area.

1.10 The contextual information about housing market conditions presented in this report focuses on the administrative boundary for the region – but is generally considered within the context of the national position, and alongside information for the London Boroughs and the London sub-regions.

1.11 Given that it is possible to define the housing market area at different levels – from very localised housing markets that operate within individual borough administrative boundary ranging up to the Greater London Housing Market (which can be defined as operating within or beyond the region's boundary) – it is appropriate for this SHMA to assess the housing market context in this way.

3. Involves key stakeholders, including house builders.

1.12 A clear project management approach was used throughout the lifetime of the Project to oversee the development of the SHMA, as described below:

- **Project Group** – planning and housing officers of the Greater London Authority. It oversaw the progress of the work and dealt with the day to day enquiries and issues. It was responsible for seeing that the SHMA was a soundly based and agreed document and has overall responsibility for decision making for the project.

- **Stakeholder Group** – representatives from a wide range of national and regional organisations. It acts as a sounding board for the Project Group. Members comment on the development of the work programme and on the emerging findings. They provide insights on all policy areas that are relevant to housing, and included representatives from the following organisations:
  - English Partnerships
  - Government Office for London
  - Home Builders Federation
  - Housing Corporation
  - London Councils
  - London Development Agency
  - London Development Research
  - London Forum of Civic and Amenity Societies
  - London Housing Federation
  - London Sub-regional Housing Partnerships
  - London Tenants Federation
  - National Housing and Planning Advice Unit
  - National Housing Federation
  - Shelter
- **Consultant Team** – Opinion Research Services (ORS) provided the necessary contextual and analytical data to inform a full SHMA for the region using both primary and secondary data, which sets out the information in an accessible form and considers the implications of that information for the region.

4. Contains a full technical explanation of the methods employed, with any limitations noted.
5. Assumptions, judgements and findings are fully justified and presented in an open and transparent manner.

1.13 Many aspects of the SHMA simply collate the range of available evidence in order for it to be considered within the local context – and a detailed technical explanation of such stages is therefore not normally necessary, and no assumptions or judgements have been taken. Nevertheless, some of the outputs from the study are dependent on more analytical work that does require a more technical explanation and are based on a series of assumptions.

1.14 The assessment of household affordability is a critical stage of the analysis that fundamentally underwrites the assessment of housing need – insofar as it determines the financial resources required to be able to access market housing. The methodology employed for this analysis is clearly set out in chapter 4 under the heading "Assessing Affordability". Once again, a number of assumptions have been made – but the methodology and assumptions are clearly set out as required by the CLG Practice Guidance (2007).

1.15 Other assumptions relating to the modelling analysis are clearly set out in chapter 5 of the report.

6. Uses and reports upon effective quality control mechanisms.

1.16 The quality of the SHMA outputs are fundamentally underwritten by the robustness of the analysis methodology employed, coupled with the quality of the data that underwrites that analysis process.

1.17 The primary source for many of the Core Outputs for the Greater London SHMA is the ORS Housing Market Model, which was developed in partnership with a wide range of organisations and has been adopted as the basis of a number of key studies, including the Greater London Housing Requirements Study (2004) and Strategic Housing Market Assessments for Exeter and Torbay sub-region (2007) and Birmingham City (2008). The model has also provided the evidence base for Greater Norwich (2007) and West Cornwall (2008) Strategic Housing Market Assessments.

1.18 A significant amount of the development time for the model was undertaken during work for English Partnerships and Milton Keynes Council, and was independently scrutinised by Three Dragons (a consultancy specialising in affordable housing policy) throughout the development process.

1.19 Results from the model have withstood scrutiny by Inspectors at numerous Local Plan Inquiries, and this independent scrutiny provides the necessary quality control in relation to the analysis methodology.

1.20 In terms of the quality of the adopted data sources, wherever possible information has been triangulated between the available information sources to identify any anomalies and avoid any dependency on erroneous data or erratic results attributable to small sample sizes.

7. Explains how the assessment findings have been monitored and updated (where appropriate) since it was originally undertaken.

1.21 Chapter 5 of this report clearly presents how the results from this SHMA relate to and update the previous analysis produced for the Greater London Housing Requirements Study 2004.

1.22 Furthermore, the report effectively reconciles the earlier modelled results with actual delivery across the region since the original analysis, and demonstrates how the shortfalls in delivery have impacted upon the need for short-term and temporary solutions such as the use of Private Sector Leased (PSL) housing and dependency on Housing Benefit in the private rented sector.

Providing the Core Outputs

1.23 Figure 3 (below) provides the relevant references for each of the Core Outputs required by the SHMA Practice Guidance in the context of this report.

Figure 3
Referencing the SHMA Core Outputs

	Core Outputs	References within the Report
1	Estimates of current dwellings in terms of size, type, condition, tenure	*Chapter 4 profiles the Existing Housing Stock* *More specifically:* – *Figure 28 gives a breakdown of property type; and* – *Figure 29 and Figure 30 give a breakdown of tenure*
2	Analysis of past and current housing market trends, including balance between supply and demand in different housing sectors and price/affordability. Description of key drivers underpinning the housing market	*The study provides a wide range of information about trends within the housing market, with references throughout chapters 3, 4 and 5.* *More specifically:* – *Figure 5 provides details on the overall population;* – *Figure 7 shows the age profile of the area;* – *Figure 10 and Figure 11 detail UK migration rates year-on-year;* – *Figure 15 shows details on asylum seekers;* – *Figure 16 provides information on unemployment rates;* – *Figure 21 shows annual VAT registrations and de-registrations;* – *Figure 18 and Figure 19 and Figure 20 detail earnings for the region;* – *Figure 34 and Figure 36, provide detail on the changing cost of housing in the region;* – *Figure 38 shows the volume of sales;* – *Figure 35 shows the changing earnings to house price ratio;* – *Figure 29 and Figure 30 show the change in tenure distribution across the stock.*
3	Estimate of total future number of households, broken	*The GLA 2007 Round Population forecasts provide*

	Core Outputs	References within the Report
	down by age and type where possible	*overall household estimates for the region, and these are referred to throughout the report. The ORS Housing Market Model also identifies the flows of households into and out of the area Figure 53 and Figure 54 show the projected number of additional households for the next 10-year period*
4	Estimate of current number of households in housing need	*An estimate of the overall current number of households in housing need is detailed in Figure 52*
5	Estimate of future households that will require affordable housing	*The gross housing requirement for Social Rented and Intermediate Affordable Housing and for Market Housing, together with the size mix of housing required by all households seeking housing (broken down by housing type) is comprehensively detailed in Chapter 5 of the report, where the outcomes of two particular scenarios are detailed in Figure 63 and Figure 65* *Full technical details on the modelling analysis are detailed in Appendix A and both scenarios described are further sensitivity tested in Appendix C*
6	Estimate of future households requiring market housing	
7	Estimate of the size of affordable housing required	
8	Estimate of household groups who have particular housing requirements e.g. families, older people, key workers, black and minority ethnic groups, disabled people, young people	*Chapter 6 of the report considers the needs of various sub-groups of the population, including:* – *Families* – *Older People* – *Black and Minority Ethnic Groups* – *Disabled People* – *Young People* – *Students* – *Key Workers*

Part 3: Space Standards

3.1. The key evidence base supporting the Mayor's proposed space standards in Policy 3.5 of the DRLP has been summarised in a report to help inform the DRLP Examination in Public[30]. This report provides useful background regarding why space standards are an issue in London (and the UK) and an outline of the origins of the Mayor's proposed approach for London.

3.2. Evidence indicates that Britain currently has some of the lowest dwelling sizes and average room sizes in Europe[31]. It also shows that there is a tendency to build smaller dwellings in London. Recent trends show the increasing provision of flats (making up 90% of total output in 2008/09), and the particular increase in the provision of two-bedroom dwellings (64% of total output in 2008/09)[32]. In addition, according to London Residential Research, the average one-bed flat has shrunk in size by 13% since 2000[33]. The Housing Space Standards report commissioned by the GLA in 2006[34] outlines that in the absence of controls, studies have shown that developers will tend to reduce the size of dwellings.

3.3. Evidence also points towards a growing demand for space, regardless of household size[35]. Although it is sometimes argued that the expected growth in one-person households in London points to the need for smaller flats - particularly for young, first-time buyers - these single households do not directly equate to small dwellings and demand for less space. GLA statistics[36] show that the major growth in one-person households is expected to be in the middle aged demographic, many being divorced or former co-habitees who may have children living with a former partner and may need more space to 'share' children between homes. Consumer research shows that space is high on the list of priorities of the increasing number of one-person households[37], and that criticism about lack of space was expressed by all groups of home buyers with singles just as vociferous as families[38].

3.4. A recent survey for CABE[39] sought to investigate residents' satisfaction with the space in their home with newly-developed dwellings, specifically in London and the Southeast. The results of the survey found that recent occupiers do indeed appear to be the most satisfied, whilst those who have lived in the home for more than 2 years are significantly less satisfied. Overall, the survey found that 54% of respondents said the amount of space in the home was very important and 39% said it was fairly important to them (totalling 93%) when choosing where to live.

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[30] Housing Design Standards: Evidence Summary. D. Mathieson for the Mayor of London, 2010
[31] MIIR, *Housing Statistics in the EU 2005/06.*
[32] CLG Housing Statistics, Live Tables on House Building, Table 254: Permanent dwellings completed, by house and flat, number of bedroom and tenure, London.
[33] Quoted in P Bill, 'Size matters to Boris when it comes to flats', Evening Standard, 27 June 2008
[34] Housing Space Standards, HATC for the Mayor of London, 2006.
[35] See J Stewart, *Room to move? Reconciling Housing Consumption Aspirations and Land-use Planning*, HBF, 2005; and C Whitehead, 2008 op cit.
[36] GLA data, based on CLG 2006-based household projects for London.
[37] Bartlett K et al, *Consumer Choice in Housing: The beginnings of a house buyer revolt*, Joseph Rowntree Foundation, 2002.
[38] CABE, *What Home Buyers Want: Attitudes and decision making among consumers*, 2005.
[39] Resident Satisfaction with Space in the Home. HATC/Ipsos MORI for CABE, 2009. Also see the executive summary by CABE, *Space in new homes: what residents think*, 2009.

However, the findings indicate that many residents in new private homes do not have sufficient space for basic daily activities and needs. Key findings include:

- 72% of all respondents say that there is not enough space in their kitchen for recycling bins;
- 47% of all respondents, and 58% of those in fully occupied homes do not have enough space for all the furniture they own, or would like to have;
- 51% of all respondents and 65% of those in fully occupied homes say that the amount of space in their homes limited the choice of furniture layout in rooms;
- 57% of all respondents and 69% of fully occupied households do not have sufficient storage to accommodate everything they need to store;
- There is often inadequate space for children and adults to socialise, and many people cannot find a quiet or private place to relax particularly in more fully occupied homes;
- 90% of new homes surveyed had spare bedroom space, which CABE argues 'adds extra weight to the problems uncovered by this research… even a spare room does not guarantee enough space to meet household needs[40];
- Higher satisfaction levels with the space in homes of residents living outside London compared with those living in London, supporting anecdotal evidence that pressures on dwelling sizes have been greatest in London.

3.5. The Mayor's proposed space standards are mainly a response to these concerns and an attempt to ensure new homes provide adequate space for living. The proposals were extensively developed through the work of Mae Architects as part of the development of the Mayor's draft London Housing Design Guide (LHDG), which was published in July 2009, and are largely based on existing requirements and good practice.

3.6. The approach taken in developing the standards was to establish a new basis, taking a functional approach to calculate the minimum space required for each room (based on occupancy) to meet the Lifetime Homes standard and to accommodate a basic inventory of furniture that is commonly required in particular rooms relative to occupancy, as well as allowing adequate access and activity space. Additional circulation space needed in dwellings above one storey was also taken into account.

3.7. The proposed space standards build on the furniture and activity requirements first expressed in the Guide to Standards and Quality developed by the National Housing Federation with the Joseph Rowntree Foundation (1998) and later incorporated in the Housing Quality Indicators, last updated by the Housing Corporation (now part of the HCA) in 2008 as part of their affordable housing grant funding requirements. These represent a basic level of furniture provision to meet day-to-day needs relative to specific numbers of occupants, i.e. 2 residents require dining space for 2, a double bed or two single beds, living room seating for 2, etc along with associated space for circulation and activity zones. See Appendices 1 and 2 of the London Housing Design Guide (August

[40] CABE, *Space in New Homes: What residents think*, p.7.

2010) which presents the outcomes of the space standards study and the furniture schedule that underpin the proposed space standards.

3.8. The standards are expressed as Gross Internal Floor Areas (GIA). GIA is defined by the RICS Guidance Note 'Code of Measuring Practice' 6th Edition as the area of the building measured to the internal face of the perimeter walls at each floor, including space taken up by partitions and circulation areas. An additional measure was added to the cumulative total for room areas to allow for circulation and internal partitions. Partitions have been calculated at 5% of the Net Internal Area, which is a consistent percentage observed in a range of completed schemes that were reviewed and measured by Mae Architects.

Table 1 – The Mayor's proposed space standards for new development.

	Dwelling type (bedroom/persons)	Essential GIA (sq.m)	**Required alignment with HCA proposals**
Flats	1b2p	50	**48**
	2b3p	61	
	2b4p	70	
	3b4p	74	
	3b5p	86	
	3b6p	95	
	4b5p	90	
	4b6p	99	
2 storey houses	2b4p	83	
	3b4p	87	
	3b5p	96	
	4b5p	100	
	4b6p	107	**109**
3 storey houses	3b5p	102	**101**
	4b5p	106	**105**
	4b6p	113	**114**

3.9. Space standards have also been proposed by the Homes and Communities Agency (HCA) in their draft core national housing standards[41] (published for consultation in March 2010 after the Draft Replacement London Plan was published). The HCA has prioritised space in its proposed national housing standards for publicly funded homes, and confirmed the approach to require space standards at the national level. The HCA have also prepared an evidence base to support their proposals which is of relevance to the Mayor's proposals[42].

3.10. The Mayor's space standards do vary slightly from those proposed by the HCA, and it is believed the allowance for circulation accounts for the minor differences between the two sets of standards (see table 1 above). The Mayor and the HCA are committed to aligning space standards in London, and this will

[41] HCA Proposed Core Housing Design and Sustainability Standards Consultation, Homes and Communities Agency March 2010.
[42] Please see: http://www.homesandcommunities.co.uk/public/documents/Consultation_Evidence_Base.pdf

be taken forward following consideration of the responses to the HCA's consultation process.

3.11. One of the biggest contributors to the quality and utility of a home is space, though measures to ensure adequate provision do not currently appear in national regulation or planning policy. Not only does the Mayor consider the space standards are to be of strategic importance for London (in accordance with paragraphs 2.3 and 2.11-2.14 of GOL Circular 1/2008), but the Homes and Communities Agency also considers that they are nationally significant including minimum space standards in its proposed national core housing standards. Countries and cities elsewhere in Europe - such as Dublin[43], have incorporated minimum space standards within planning policy, citing that 'the floor area of an apartment is the critical measure of its liveability'[44]. They have not found these standards a significant constraint on housing supply.

3.12. In London, a majority of boroughs have planning policy or supplementary guidance encompassing housing standards[45], and these have complemented standards that have been put forward by the Housing Corporation and English Partnerships in the past. The Mayor's proposed space standards compare well to others, however, some differences exist due to the considerations of circulation space which have been incorporated into the Mayor's proposals.

3.13. Most standards are largely confined to advice notes and planning guidance, to which it is not always possible to attach significant weight in terms of planning decisions, in planning appeals or in the planning enforcement process. It is expected that giving space standards the weight of development plan status will help mainstream this important issue and will assist implementation at the borough level. This is also supported by CABE who state it is important that standards are made mandatory to allow the market to adjust and implement effectively[46].

[43] Please see D. Mathieson, op cit for further examples.
[44] Dublin City Council, Achieving Liveable Sustainable New Apartment Homes, Variation (No. 21) of the Dublin City Development Plan 2005-2011.
[45] HATC 2006, op cit.
[46] Improving the quality of new housing - technical background paper. CABE, 2010.

Part 4 - Intermediate Housing Upper Income Threshold

4.1 This section sets out the technical background to the annual income thresholds for eligibility for intermediate housing proposed in Policy 3.11 and paragraphs 3.44 and 3.55 of the draft replacement London Plan (DRLP).

4.2 The eligible income limit for intermediate housing is currently the same - £60,000 a year - for all intermediate purchasers, regardless of where in the country they live or the size of home they need. The Mayor's draft statutory London Housing Strategy and draft replacement London Plan seek to extend this to £74,000, for families in London.

4.3 The reasons for this policy change are as follows:

- To meet the need for additional family-sized intermediate homes.
- To reduce the necessity for low and middle-income families to move away from London.
- To ensure more mixed communities in new housing developments.
- To contribute to reducing overcrowding.
- To address the relative unsuitability of the private rented sector as an alternative option for families.
- To make family-sized intermediate homes more financially viable

4.4 These reasons for extending the cap are all briefly explored in this section of the technical paper. The rationale for setting the new cap at £74,000 is set out in the concluding paragraphs of this section (4.29 – 4.32), including the estimated impact of this change.

Integrated London Housing Strategy/DRLP approach

The draft London Housing Strategy

4.5 The Mayor's London Housing Strategy states:

"Policy 1.2.1C The top of the income range for intermediate housing in London should increase, for families, to £74,000".

The upper income threshold for intermediate housing should be increased to £74,000 for households with dependents. This is intended to reflect the higher cost of both developing and buying family-sized homes in London, and will provide new opportunities for households with dependents to take up intermediate housing in the capital.

The income threshold for intermediate housing is currently set at slightly different levels for the purposes of housing investment and planning. Under HCA investment criteria, intermediate housing has only been available to first time buyers with an annual household income of up to £60,000, and the effect of Policy 1.2.1C is to

raise this investment ceiling for households with dependents (but to leave the £60,000 unchanged for all others).
For planning purposes, the *draft London Plan* specifies that for new homes to be counted as intermediate, they must be affordable to households in the income range £18,100 to £61,400, with the aim that the average of all new intermediate housing should be at the midpoint of this range. However, for family-sized homes with three or more bedrooms, it increases the top of the intermediate income range by 20 per cent, giving a new upper limit of £74,000 (rounded to the nearest £1,000).

'Families' comprise households with children, and those that include an adult for whom a member of the household has caring responsibilities.

The draft London Plan

4.6 Policy 3.11 of the DRLP, which sets out the definition of affordable housing, states that:

"Affordable housing includes social rented and intermediate housing (see Para 4.10), provided to specified eligible households whose needs are not met by the market and must:

- meet the needs of eligible households including availability at a cost low enough for them to afford, determined with regard to local incomes and local house prices
- include provisions for the home to remain at an affordable price for future eligible households
- provide for the subsidy to be recycled for alternative affordable housing provision if these restrictions are lifted.

4.7 The definition of affordable housing set out above applies national guidance to the circumstances of the capital and should be used for planning purposes in London. Within this overarching definition:

- ***social rented housing*** should meet the criteria outlined Policy 3.11 and be rented housing owned and managed by local authorities or registered social landlords, or be provided by other bodies under equivalent rental arrangements agreed with them as a condition of public sector investment grant, and for which guideline target rents are determined through the national rent regime
- ***intermediate housing*** should meet the criteria outlined in Policy 3.11 and be available at prices and rents above those of social rent, but below market prices or rents. New intermediate homes should be affordable to households whose annual income is in the range £18,100–£61,400. For homes with more than two bedrooms, which are particularly suitable for families, the upper end of this range will be extended to £74,000. These figures will be updated annually in the Annual Monitoring Report.

Policy justification - housing need

4.8 The GLA's 2008 Strategic Housing Market Assessment (SHMA) calculated the need for intermediate housing, in line with the provisions of PPS3. This showed that 86% of the need for intermediate housing in the capital between 2007 and

2017 is for homes with three bedrooms or more, with over half of that being for four bedroom homes.

2008 SHMA intermediate needs

1 bedroom	nil
2 bedroom	5,300
3 bedroom	12,000
4+ bedroom	19,300
Total	**36,500**

4.9 These findings are very similar to those in the 2004 Housing Requirements Study that underpinned the 2008 London Plan and the Housing Strategy of the previous Mayor. They show that, while there is no shortage of evidence that there is large-scale demand for one and two bedroom intermediate housing, there is very little demonstrable need to provide such homes. This difference between need and demand is an important distinction in policy terms.

4.10 Simply stated, the demand for intermediate demand arises from those within the set criteria (e.g. key workers, households with income below £60,000) who have the financial means to access intermediate products, and a desire to access low cost home ownership – whether or not they are currently in 'housing need'. There is clear evidence that this demand has outstripped supply (see Paras 4.29 – 4.32).

4.11 Housing need is defined in terms of households that are not currently in a home that is affordable to them, of an appropriate size for the household or of a decent quality. In these terms, the need for market (owner occupied or private rented) and social rented housing is fairly straightforward to define.

4.12 Assessing the need for intermediate homes is a little more complex. It is defined in the SHMA as households with incomes that mean they can afford to pay above a social housing rent, but which do not enable them to access lower quartile owner occupation (the normal entry level for first time buyers) or lower quartile private renting. The top of the London Plan income range is based on those who cannot afford to access owner occupation (i.e. 3.5 x the lower quartile house price for all homes).

4.13 For most households in this income range requiring one or two bedroom homes, this need can be met through the private rented sector. However, for households that require family sized housing, the private rented sector does not provide sufficient numbers of homes to rent at a price that is affordable.

4.14 This does not mean that there is no policy justification for providing one and two bedroom intermediate homes. Current national and Mayoral policy is to tackle the problems of affordability, and the declining proportion of households in London that are homeowners, by providing one and two bedroom low cost homes to buy. However, it should be recognised that the provision of these smaller homes is primarily about meeting aspirations and wider policy goals, not about meeting housing need as such.

4.15 In light of this need to balance need and demand, the target agreed with the previous Government for the current London Housing Strategy was to try to raise the level of intermediate family sized homes from only 4% of all new intermediate homes delivered in 2004-6, to 16% by the end of 2008-11. This would bring the family sized intermediate supply in line with the supply of new family sized market homes. However, this target is now very unlikely to be met. At present delivery is around 7%, with much of that to date being from Open Market Homebuy, a scheme in which 44% of homes purchased in London were three bedroom or larger.

Policy justification – wider housing issues

4.16 The balancing of need and demand set out in the previous section is articulated at a local level in most London boroughs' Local Development Frameworks and/or housing strategies and policies. Most set out the policy justification for more low cost home ownership, often expressed in a policy aim to preventing low and middle income families being effectively forced from the local area when they wish to move into home ownership. These policy justifications set out the damaging effect on the local communities of people being forced to leave the borough when they wish to move into home ownership, due to the unaffordability of home ownership within the local area.

4.17 This has a particular impact on new housing developments. Because only a relatively small percentage of the market homes on new mixed tenure developments are family-sized homes, and a much smaller percentage still of the intermediate homes are family-sized, this means that most, if not nearly all, of the children on new developments are likely to be in families in social housing. Further, as it is not possible to influence who moves in to the larger market homes, many of these are occupied by privately rented flat shares or households with no children looking for additional space. In contrast, intermediate housing, like social housing, has a form of allocations policy that would enable boroughs to ensure that family-sized homes were occupied by families.

4.18 The provision of family sized intermediate housing could also contribute to other housing policy aims. By providing the sort of family accommodation that is more attractive to families in social rented housing wishing to move into home ownership, it could free up behind it family-sized social rented housing. This could have a knock on effect on reducing the numbers of families in temporary accommodation and could also help reduce overcrowding.

4.19 Where boroughs have assessed actual demand for intermediate homes, there is evidence of the demand for larger homes. For example, in Wandsworth, a borough that keeps a waiting list for intermediate housing, one in ten of those registered want three or more bedrooms, rising to one in five among black and minority ethnic households.

4.20 An important consideration, in terms of moving more towards meeting need than meeting demand, is the role that the private rented sector can play and the justification for intervening to help people buy a home.

4.21 The private rented sector is generally a less suitable and desirable option for families than for households without children. In need terms, this is because there is very little supply of appropriately sized private rented housing in London available to families in this income band. But it is also because it is at the stage that people start a family that they also start to consider settling more permanently in a given area. They wish to be less mobile as their children go into nursery and school and parents also start to consider and plan their longer term financial position. These are compelling reasons for many, although by no means all, of these households to want to move into home ownership. With a policy of encouraging home ownership, there is therefore a strong case for public intervention to help people buy a home, targeting help on these households.

4.22 There is then a question whether there is a similarly compelling case for assisting single people into home ownership in this way. In contrast to family sized private rented accommodation, there is a plentiful supply of one and two bed private rented homes.

4.23 London's vibrant and growing private rented market is a significant factor in its economic vitality. The private rented sector supports a more flexible workforce; enabling people not just to move into London but to move about it as circumstances and employment changes. To move these people in to owner occupation may not be in the overall best economic interests of London's economy. In contrast, families would generally be seeking to settle into owner occupation in any case and, if they cannot do so in their local area, would seek to do so in a cheaper area. This ripple of families out from the central London area – to outer London and then the surrounding regions – is part of the cause of the house price growth across the wider South East.

4.24 A further justification for the proposed thresholds is the extent to which increasing the cap, both for planning and housing investment purposes, will make family sized intermediate homes more viable to deliver. The most compelling reason that so few family-sized intermediate homes are delivered on new developments (around a quarter to a third of the number of family-sized market homes) is the cost of delivering these homes. The primary issue is the level of grant needed, which would need to be addressed if a target for the number of family sized intermediate homes is to be set and delivered. But raising the cap, of itself, will make some contribution to making these homes more viable to deliver, how ever targets and grant rates are set.

4.25 Notwithstanding the proposed shift towards helping families, there is a case for uprating the threshold, as it has been unchanged for years, despite declining affordability. Government has not changed the £60k threshold since it was introduced in 2004. This effectively means that the investment and access criteria have become less generous over time, despite the affordability gap for first time buyers having widened. If the threshold had been uprated in line with house prices, as the London Plan intermediate housing income band has been, it would now be £78,000. There is also to some degree a precedent for London having a different income range to the rest of England, as the London Plan income range has never been identical to government policy.

Deriving the £74,000 income upper threshold

4.26 Setting the income ceiling at £74,000 reflects the higher cost of family-sized housing in London compared to other regions. But there is no simple way of deriving a 'London family homes premium'. The average costs of three bedroom and four bedroom homes purchased by first time buyers in London are £250,00 and £357,000 respectively, compared with £144,000 and £215,000 in the rest of England[47]. First time buyer (FTB) prices tend to be broadly in line with lower quartile prices in each region.

4.27 These higher costs are, of course, offset by higher incomes in the capital, with CLG figures showing that the affordability gap (lower quartile price to income ratios) is 9.14 in London, some 26% higher than the figure of 7.25 nationally. However, those falling within the income definition for intermediate housing do not, by definition, benefit from these higher incomes in London.

4.28 Looking instead at purchasing power, the existing income ceiling of £60,000 would imply purchasing power of £210,000, if it is assumed a mortgage of 3.5 times income is obtained. Raising the limit to £74,000 would increase this to £259,000, just above average FTB purchase price for a three bedroom home in London. The extra cost in London of a third or fourth bedroom is so large that it could push the upper limit over £100,000. The table below summarises some of the possible ways of calculating the new upper limit (with all figures rounded to the nearest £1,000).

4.29 Clearly, some of the options in the table would give too high a figure to justify in terms of a 'middle market' offer, even in London. Therefore, the option that has been adopted is to take the existing London Plan range – currently £61,400 – and uprate it by a flat amount of 20%, giving a new upper threshold of £74,000. Although it is in some ways an arbitrary number, it can be justified and balances the need to adjust for family homes with the need to be fair to those on lower incomes by not extending the range too far. It also has the virtue of simplicity and would automatically update with house prices every year, alongside the London Plan updating of the intermediate housing income range.

Based on 3 bed average FTB house price, assuming a mortgage at 3.5 x income	£71,000
Based on 4 bed average FTB house price, assuming a mortgage at 3.5 x income	£102,000
Mid-point of 3 bed and 4 bed average FTB house prices, assuming a mortgage at 3.5 x income	£87,000
£60,000 current ceiling adjusted in line with London FTB house prices compared with rest of England average (72% premium)	£103,000
£60,000 current ceiling adjusted in line with London's larger affordability gap (26% premium)	£75,600
London Plan upper limit (£61,400) plus 20%	**£74,000**

[47] CLG analysis commissioned from the Regulated Mortgage Survey, 2009

Part 5 – Student accommodation requirements

Introduction

5.1 Providing high quality student accommodation, at sustainable levels and in the right locations is essential to maintaining London's role as a world centre for higher and further education and, indirectly, the wider contribution the sector makes to the London economy and its labour market. DRLP Policy 3.8 recognises this and seeks to ensure that "strategic and local requirements for student housing are addressed by working closely with higher and further education agencies, and without compromising capacity for conventional homes".

5.2 Research into the nature and scope of long term demand for student accommodation is limited. Most commercial property consultants[48] and umbrella organisations and agencies[49] representing the universities have tended to focus on the short to medium term. While this has informed development of the DRLPs position on student requirements of students, understanding longer term trends has been hampered by limited information.

5.3 To extend this context for Policy 3.8, possible levels of future growth in London student numbers have been projected using government statistics. The views of a range of stakeholders, complemented by transparent assumptions described in this report, have been applied to these projections to produce scenarios illustrating possible future student accommodation requirements for the decade to 2021, and in particular the need for purpose built accommodation. It is anticipated that this may be provided by the universities themselves or by the private sector. Though purpose built private sector provision is still small relative to the total purpose built stock, it has been growing rapidly in recent years.

5.4 DRLP consultation showed that there is a wide range of constituencies of interest in this sector of the housing market and this diversity reinforced a central message from the consultation process: there appears to be considerable uncertainty as to future, long term trends. A range of factors make projecting them technically challenging.

5.5 These factors include:

- the forecast demographic 'dip' in the potential UK student market as a whole;
- whether the 'London factor' will mitigate or exacerbate this and associated accommodation demand e.g. the effect of the 'buzz' and prestige of studying in London relative to the cost of living here;
- the future role of purpose built student accommodation in meeting need including the relative roles of universities themselves in providing it, of private sector providers and of the emerging 'affordable' accommodation providers;

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[48] Commercial property consultancies include Savills, King Sturge, Drivers Jonas Deloitte, and BBP Regeneration.

[49] The UK higher education agencies and organisations include Universities UK, British Council, Higher Education Statistics Agency (HESA), London Higher, University of London, and National Union of Students (NUS).

- the attractions to students of sharing conventional private rented homes relative to purpose built accommodation and the implications this may have for other elements of the mainstream private rented market;
- the very varied accommodation offers of different parts of London relative to its 43 universities; and
- the future funding and organisational arrangements of the universities themselves and broader government policy on higher education.

5.6 One particular factor which exercised almost all stakeholders was whether and how students from beyond Europe would continue to drive demand for places at London universities – this itself is subject to a range of uncertainties including:

- global competition between universities;
- the emergence of domestic competition in countries which have hitherto been a source of students, not least in terms of relative cost and quality;
- political and 'fashion' trends;
- the long term importance of 'English' English relative to 'globish' English[50], as well as
- wider globalisation trends..

5.7 It is clearly not possible to construct a model which can combine the effects of these uncertainties on London student accommodation requirements through to 2021, much less 2031. Instead, it has been assumed that broad, evidenced based history is probably the most robust starting point for thinking about future requirements, and then to apply a selection of transparent, reasonably based assumptions to 'history' based projections or scenarios to provide a 'best fit' range of requirements

5.8 Of particular value in this process have been the assessments of the types of accommodation which students currently occupy, provided by the University of London, Drivers Jonas Deloitte, and King Sturge, which each hold comprehensive data sets on existing provision and pipeline schemes. All three show that purpose built student accommodation is home to 18% to 22% of university students in London[51] - a key baseline when considering future needs.

5.9 The scenarios used in policy development drew more generally on the longest available government time series showing trends in under graduates and post graduates and distinguishing between those who are London domiciled on registration, those who are domiciled in the rest of the UK, in the rest of Europe and elsewhere in the world. They seek to take account of demographic changes which may bear on UK domiciled students and, tests assumptions on changing levels of future overseas students. It is intended that this data base will be developed by the Mayor's proposed 'academic forum' to explore broader issues e.g. changes in the relationship between the roles of conventional private rented accommodation and purpose built student accommodation in meeting student demand.

5.10 The findings of this research are summarised below:

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[50] Economist. Foreign University Students: will they still come? 7.8.10

[51] The figure of total student population is only for full time students (postgraduates and undergraduates) in the academic year 2008/09. Source: Higher Education Statistics Agency (HESA)

Summary of results

Current demand structure

- In 2007/08 there were 260,000 full time undergraduate and postgraduate students in London universities, compared with 184,000 in 1995/6.
- Some 55% of those registering in London universities between 2002/3 and 2007/8 were not London domiciled.
- Of these, 52% had a UK address, 15% had an EU address and 33% were domiciled elsewhere in the world.
- Since 1995/6 those domiciled elsewhere in the world have accounted for 47% of overall London student growth; a simple average increase of 3,000 pa.

Scenarios

- Three different sets of demand scenarios are set out below based on the simple average increase in student numbers; variant projections of the rolling average historical increase; and variant projections derived from the British Council overseas postgraduate growth assumptions. They indicate that:
  - 'Simple annual average historic growth' approximates to a total of 6,000 students pa
  - The 'best fit' among the range of projected growth trends approximates to a total of 9,400 students pa
  - Growth rate sensitivities around this figure suggest that it should be set in the range 9000 – 13,000 pa
  - An alternative approach might focus on students with the greatest propensity to require purpose built accommodation i.e. only overseas and non-London domiciled. Based on the above range this group could increase by 5,200 – 7,200 students pa.

- If a fifth of all student continues to be housed in university and/or private sector purpose built accommodation and this assumption is applied to the above growth range, then London may require 1,800 – 2,700 purpose built student bed spaces per annum – but only 700 pa on the basis of a simple average growth assumption.
- On the basis of the current housing preferences only of overseas and non-London domiciled students, of whom 27% currently live in purpose built accommodation (the Alternative approach outlined above), this group might require 1,400 – 1,900 additional bed spaces pa

Conclusion

- In light of the intent of DRLP Policy 3.8 it should be noted that:
  - The 'simple average growth' scenario does not fully reflect the 'direction of travel' of the underlying trend in student numbers
  - Of the other scenarios, some produce growth rates lower than the simple historic trend. It would currently seem imprudent to adopt these when policy seeks to encourage growth in student accommodation.
  - Others suggest a high growth rate which, on the basis of the patterns associated with general, historic economic trends, would not appear sustainable in the long term.
  - There is considerable overlap among the ranges produced by the scenarios.
- Given the direction of travel in the Policy and uncertainties in the student housing market (see above) it is proposed that the 9,000 –13,000 more students pa be used as a range to inform monitoring. This approximates to 1,800 – 2,700 purpose built

student places pa.

- It should be noted that:
  - The bottom end of this range approximates to the initial historic provision based capacity estimate identified by the SHLAA/HCS, subsequently refined to 1,700 places pa shown in the monitoring benchmarks in DRLP Annex 4.
  - This range also spans the 2,000 – 2,500 pa overseas student based growth assumption cited as background to DRLP Policy 3.8.

Wider considerations

As noted above, these scenarios do not cover all factors likely to bear on long term future demand for student accommodation in London. In particular:

- They do not take account of potential shifts in the existing patterns of provision between different types of accommodation e.g. from living at home to purpose built student accommodation, or from purpose built student accommodation to renting conventional dwellings. However, the scenarios do provide wide ranges in which at least some of these changes might take place.
- The assumption that 55% of students will not be domiciled in London is based on a relatively short run data set (2002-2008) spanning a time of significant increase in overseas students..
- Account has not been taken of the effects of the relative costs of renting purpose built accommodation and sharing conventional private rented property.
- The assumption for international postgraduate students (4.7%) derived from the British Council's findings[52] is substantially less than the historic trend recorded in London, but it is not clear how far it has factored in the effects of increasing competition from other growth markets such as the Emirates and Australia and the recent and possibly sustained decline in Chinese student numbers

'Rolling average' growth scenarios

5.11 This scenario applies to all postgraduate and undergraduates – including international students from beyond the EC. Using the longest available Higher Education Statistics Agency time series on all full time under graduate and post graduatent students in London (1995-2008), the GLA Data Management and Analysis Group (DMAG)[53] undertook projections of the student population to 2021. The main assumption underlying these projections is that the historical trend will continue over the next 10 year period. This approach was based on a 'rolling average' of the the historic trend and produced 'high' and 'low' scenarios +3/-3% either side of the actual rolling average ('medium') scenario.

5.12 A rolling average (also called 'moving average') is used within time series to smooth out short-term fluctuations and highlight longer-term trends or cycles. This is a common method for summarising trends embedded in past historical data. Part-time students have not been included in the time series projections. This is because many of them often study and work at the same time and their

[52] British Council, Universities UK, IDP, Education UK. Vision 2020. Forecasting international student mobility: a UK perspective. British Council, 2004.
[53] DMAG. GLA Data Management and Analysis Group (DMAG), Education Unit

accommodation requirements may be addressed in the wider housing market rather than in purpose built student accommodation.

5.13 Annex 1 provides details of the historical data and projections on full time undergraduate student numbers (Table A1.1 & A1.2) and postgraduate student numbers (Table A1.3 & A1.4).

5.14 The dominant component of full time undergraduate students in London is generated by those who are UK domiciled. This component accounts for 83%[54] of the total undergraduate student population. Recent demographic evidence[55] suggests that there could be some decline among young adults (18-20 year olds) as a whole in the UK between 2009 and 2020[56] and this may have a negative impact on the growth of UK domiciled undergraduates. Stakeholder engagement suggested that while this may affect some universities elsewhere in the UK[57], London, as an attractive place to live and study, may be less susceptible to it[58]. However, this view should be set in the context of the possible effects of the higher costs of living in London. The use of three growth scenarios helps to illuminate the possible consequences of this demographic trend, with the 'low' scenario being most likely to demonstrate its negative impact. Details of these scenarios are outlined in Table 5.1 below:

Table 5.1: 'Rolling average' total full time UK domiciled students[59] to 2021:

Academic year	**Rolling average ratio projections based on historical data (Medium scenario)**	**High rolling average ratio projection based on historical data (High scenario)**	**Low rolling average ratio projections based on historical data (Low scenario)**
2010/2011	202,899	208,585	195,716
2011/12	207,116	214,933	197,391
2012/13	211,422	221,499	199,080
2013/14	215,822	228,292	200,784
2014/15	220,317	235,323	202,503
2015/16	224,908	242,601	204,236
2016/17	229,599	250,135	205,984
2017/18	234,390	257,936	207,747
2018/19	239,286	266,016	209,526

[54] GLA projections used in this Note
[55] Recent research includes 'The future size and shape of the higher education sector in the UK: demographic projections (Universities UK, 2008)', 'Student demographic changes in London predictions for 2009 – 2027 (London Higher, 2009)', 'London Student Housing Requirements Study, Chapter 5 (BBP Regeneration/London Development Agency, 2007).
[56] Source: Office for National Statistics (ONS) population pyramid http://www.statistics.gov.uk/populationestimates/flash_pyramid/EW-pyramid/pyramid6_30.html
[57] Page 7, Table 1 'percentage change in the 18-20 year old population 2006 and 2027 for the UK, its constituent countries and the rest of the EU' – 'The future size and shape of the higher education sector in the UK: demographic projections'.
[58] Consultation response from London HE stakeholders.
[59] Full time UK domiciled students refer to all postgraduate and undergraduate students who are domiciled in the UK.

2019/20	244,288	274,385	211,319
2020/21	249,398	283,057	213,128
Total increase over the 10 year period	**46,499**	**74,472**	**17,412**
Increase per annum	**4,649**	**7,447**	**1,741**
% of growth since 2010	**23%**	**35%**	**9%**

'British Council' amended postgraduate growth scenarios

5.15 An alternative set of scenarios sought to take particular and independent account of a key driver of change in student growth – the increase in international students from beyond the EU and in particular that associated with international postgraduate students. In 2004 the British Council estimated that the number of international postgraduates might grow at 5.7% per annum to 2020, though international undergraduates were expected to grow at only 3.5% ie close to the 'rolling average' growth range.

5.16 Since 2004 there may have been changes to the trends which informed the British Councils assumptions. For example, the substantial growth in Chinese students 2001- 2004 many not be sustained into the future[60] - since 2005 their numbers have been static and have even declined slightly in London. The Chinese Government has been building up its capacity in universities since early 2000s and the opportunity for more students to remain in China has grown. There are also other competing university offers for international students, such as the Emirates and Australia.

5.17 In light of this, rather than using the British Council's 5.7% international postgraduate growth assumption one of 4.7% has been used in this amendment to the 'rolling average' scenario. The 4.7% figure is drawn from the British Council's figure for both international undergraduates and post graduates. This is shown in red in Table 5.2 below.

[60] Consultation response from HE stakeholders

Table 5.2: 'Rolling average' and 'British Council' amended projections of full time overseas postgraduates to 2021:

Academic year	Rolling average ratio projections based on historical data for overseas postgraduates (Medium Scenario)	Amended figures with an annual growth rate of 4.7% in overseas postgraduates (Medium Scenario)	High rolling average ratio projection based on historical data for overseas postgraduates (High Scenario)	Amended figures with an annual growth rate of 4.7 in overseas postgraduates (High Scenario)	Low rolling average ratio projections based on historical data for overseas postgraduates (Low Scenario)	Amended figures with an annual growth rate of 4.7% in overseas postgraduates (Low Scenario)
2010/11	43,570	43,570	48,554	48,554	38,744	38,744
2011/12	47,762	45,618	55,183	50,836	40,842	40,565
2012/13	52,357	47,762	62,717	53,225	43,053	42,472
2013/14	57,394	50,007	71,278	55,727	45,384	44,468
2014/15	62,916	52,357	81,009	58,346	47,841	46,558
2015/16	68,970	54,818	92,069	61,088	50,432	48,746
2016/17	75,605	57,394	104,638	63,960	53,163	51,037
2017/18	82,879	60,092	118,923	66,966	56,041	53,436
2018/19	90,854	62,916	135,158	70,113	59,076	55,947
2019/20	99,595	65,873	153,609	73,408	62,274	58,577
2020/21	109,177	68,969	174,580	76,858	65,646	61,330
Total increase over the 10 year period	65,607	25,399	126,026	28,304	26,902	22,586
Increase per annum	6,560	2,539	12,602	2,830	2,690	2,258
% of growth since 2010	150%	58%	260%	58%	69%	58%

Total students scenarios

5.18 As noted above, the 'rolling average' scenarios for the London resident student population are based on the last 13 years of real data (1995 – 2007). These were refined in variant projections to reflect separate figures for international post graduate students derived from the British Council's 2004 assessment. Both sets of scenarios in Table 5.3 cover full time undergraduates and postgraduates.

5.19 The scenarios with a British Council component (in red) indicate that London student numbers[61] could grow at between 15% to 50% annually, which largely falls within the range between the low (16%) scenario and medium (45%) scenario of the historical, 'rolling average' projection (in black). To reconcile these two sets of scenarios, the midpoint of this range (32.5%)[62] has been used

[61] London student number refers to the total population of full time undergraduate and postgraduate students who are domiciled both from the UK and overseas.

[62] Over the next 10 years full time student numbers in London is expected to grow 32.5% to 380,000 (best fit trend). Savills's independent research 'Spotlight on … student housing (June 2010)' shows that London has witnessed growth in full-time student numbers of over 18% during the past five years, and an increase of 35% over the past decade'. The best fit of estimated growth rate is close to what has happened in the past 10 years.

to suggest the 'best fit' trend to illustrate future growth in the student population. The mid point suggests that London might have an additional 94,000 full time student numbers over the 10-year period, equivalent to an additional 9,400 student numbers each year. To take robust account of potential future changes, this 'best fit' figure is set in a 30% - 45% sensitivity growth range indicating that London's student population might grow by 9,000 to 13,000 per annum over the decade to 2021. This range maybe set against the more static benchmark provided by the simple, average annualised increase in student numbers 1995 – 2008: some 6,000 pa.

Table 5.3: The GLA projections for numbers of London students to 2021

Academic year	Rolling average ratio projections based on historical data (Medium Scenario)	Amended figures with an annual growth rate of 4.7% in overseas postgraduate numbers (Medium Scenario)	High rolling average ratio projection based on historical data (High Scenario)	Amended figures with an annual growth rate of 4.7% in overseas postgraduate numbers (High Scenario)	Low rolling average ratio projections based on historical data (Low Scenario)	Amended figures with an annual growth rate of 4.7% in overseas postgraduate numbers (Low Scenario)
2010/11	289,402		289,402		289,402	
2011/12	299,544	297,401	318,707	314,360	277,808	277,532
2012/13	310,250	305,655	335,845	326,354	282,081	281,499
2013/14	321,564	314,177	354,429	338,877	286,491	285,574
2014/15	333,533	322,974	374,620	351,957	291,045	289,761
2015/16	346,210	332,058	396,601	365,621	295,751	294,064
2016/17	359,649	341,438	420,576	379,898	300,615	298,489
2017/18	373,914	351,127	446,776	394,819	305,646	303,040
2018/19	389,072	361,134	475,463	410,418	310,851	307,723
2019/20	405,195	371,473	506,928	426,728	316,239	312,542
2020/21	422,363	382,155	541,506	443,785	321,820	317,504
Total increase over the 10 year period	**132,961**	**92,753**	**238,634**	**140,913**	**48,152**	**43,836**
% of growth since 2010	**45%**	**32%**	**82%**	**49%**	**16%**	**15%**
Increase per annum	**13,296**	**9,275**	**23,863**	**14,091**	**4815**	**4,383**

Purpose built student accommodation requirement scenarios

5.20 Tables 5.5 – 5.7 illustrate the types of accommodation in which students currently live. The average of these has been applied to the student growth scenarios above to generate scenarios illustrating requirements for purpose built student accommodation. Two approaches have been used in this process to provide 'double checks' on each other.

5.21 The first method draws simply on the Tables below. These suggest that on average 20% of total students live in purpose built student accommodation. Applied to the suggested total growth range for student numbers (9,000 – 13,000), they indicate if this pattern continues, London may require 1,800 – 2,700 additional student bed spaces per annum over the decade.

5.22 The alternative approach seeks to identify those students with the greatest propensity to require purpose built accommodation. These are likely to have a permanent addresses outside London at the time of registering with a London university, including international students from beyond the EU. Historic growth trends in student numbers from 2002-2008 show that 55% of the annual increase in students is generated by those who are non-London domiciled ie within this group. Applied to the best estimate (9,400 pa), this would suggest that the group might increase by 5,200 pa between 2011 and 2021. Their current living arrangements differ from those of students as whole (few are likely to be living in the parental home). On the basis of Table 5.9, 27% are currently in hall/private purpose built and 72% in the private conventional rental sector, and if this pattern is maintained for the future this group may generate demand for 1,400 to 1,900 additional bed spaces per year. This is at the lower end of the demand range suggested by the first method (1,800 – 2,700).

Conclusions

5.23 Neither of these approaches take account of the wider uncertainties which bear on the student accommodation market. Some of the factors underlying them suggest that demand for purpose built accommodation may increase while others imply it might not maintain its historic momentum. For example, account is not taken of potential shifts in the existing patterns of provision between different types of accommodation e.g. from living at home to purpose built student accommodation, or, conversely, from purpose built student accommodation to renting conventional dwellings.

5.24 The assumption that 55% of growth in total student numbers will be generated by non-London domiciled students, which include a substantial number from beyond the EU, has been sourced from a short run data set (2002-2008), possibly reflecting trends which may not be sustainable in the longer term. Against this must be set the projections' use of a relatively prudent assumption on underlying growth among this group, though whether this is sufficiently so to take account of emerging changes in this element of the market is unclear e.g. how far it reflects competition from other global university 'players', such as the Emirates and Australia, and/or the recent reduction in demand from Chinese students. Conversely, if this international student assumption is too generous, it might nevertheless be off-set by London's continuing attractions for UK domiciled students despite the demographic downturn in their numbers nationally. On the other hand, this UK domiciled group might be negatively affected by the general costs of living in London, or by the costs of renting purpose built accommodation relative to conventional private rented property. The Mayor's DRLP commitment to establishing an 'academic forum' will provide an opportunity to test the implications of these uncertainties for future provision, drawing on the information presented here as one benchmark.

5.25 A 'best estimate' range of student accommodation requirements has been drawn from a spectrum of scenarios. The rationale for selecting this range is outlined above. Particular emphasis has been placed on the need for prudence to avoid constraining possible growth in the purpose built student accommodation market. However, it is recognized that in reality the recommended range may be tempered by the realities of the London land market and in the context of wider planning policies, not least those for conventional housing.

Table 5.4 - Total number and percentage of Postgraduates and Undergraduates not domiciled in London 2002 – 2008

Year	Total number FT UG and PG students in London	Number not London domiciled	Number London domiciled	% of all undergraduates and postgraduates, including overseas students who were not London domiciled	% of all undergraduates and postgraduates, including overseas students,who were London domiciled
2002/03	226,890	123,120	103,770	54	46
2003/04	232,665	126,185	106,480	54	46
2004/05	241,260	131,520	109,740	55	45
2005/06	251,785	136,925	114,860	54	46
2006/07	255,120	140,155	114,965	55	45
2007/08	261,940	146,300	115,640	56	44
Average	244,943	134,034	110,909	55	45

Source: Annual HESA report 'Students in Higher Education Institutions (2002/03 to 2007/08)

Table 5.5: Estimates from University of London[63] of the current structure of students by accommodation type and proportion of students in London – *The base year for this data is 2008/09 (total student numbers in London 268,085)*

	Accommodation (bed spaces)	Proportion of students
Non accredited charitable halls	3,808	1%
Private sector purpose built	16,944	6%
University accommodation	35,464	13%
Parental homes		24%
Others (HMOs or shared of houses/flats)		56%
Total purpose built accommodation: 20%		

Table 5.6: Estimates from Savills[64] of the current structure of students by accommodation type and proportion of students in London – *The base year for this data is 2008/09 (total student numbers in London 268,085)*

	Accommodation (bed spaces)	Proportion of students

[63] University of London's estimates for current structure of student accommodation are based on the 2008/09 student numbers (268,085) derived from the HESA.
[64] These estimates are sourced from Savills 'Student Housing' report (2008) and that were based on full time student numbers of 241,318.

Private halls	8,773	4%
University accommodation	44,298	18%
Parental homes	55,699	23%
Others (HMOs or shared of houses/flats)	100,731	42%
Total purpose built accommodation: 22%		

Table 5.7: Estimates from King Sturge[65] of the current structure of students by accommodation type and proportion of students in London – ***The base year for this data is 2008/09 (total student numbers in London 268,085)***

	Accommodation (bed spaces)	Proportion of Students
London Universities	46,589	17%
Direct Let Private Sector Operators	10,105	4%
Other (Students Resident "at home" or in HMOs)	211,391	79%
Total purpose built accommodation: 21%		

Table 5.8: Estimates from Drivers Jonas Deloitte[66] of the current structure of students by accommodation type and proportion of students in London – ***The base year for this data is 2008/09 (total student numbers in London 268,085***

	Accommodation (bed spaces)	Proportion of Students
Total purpose built student accommodation (university owned and private sector accommodation)	50,959	19%
Total purpose built accommodation: 19%		

Table 5.9: Estimates from the University of London[67] - proportion of total provision in London by accommodation type – ***The base year for this data is 2008/09 (total student numbers in London – not including those living at home – 206,343)***

	Accommodation (bed space)	Proportion of total provision
Purpose built accommodation	53,216	27%
Other accommodation	150,127	23%
Total (not including living at home)	206,343	

Source: Uni of London

[65] These estimates are sourced from King Sturge report 'London Student Accommodation Market (2010)' and based on the 2008/09 student numbers (268,085) derived from the HESA.
[66] These estimates are sourced from Drivers Jonas Deloitte report 'Crane Survey- London student housing 2010' and based on the 2008/09 student numbers (268,085) derived from the HESA.
[67] University of London's estimates for current structure of student accommodation are based on the 2008/09 student numbers (268,085) derived from the HESA.

Annex 1

Table A1.1 Actual and projected numbers of UK domiciled full-time undergraduates attending Higher Education institutions in London

	Academic year	Rolling average ratio projections	High rolling average ratio projection	Low rolling average ratio projections
London actual totals	1995/96	131,767	131,767	131,767
London actual totals	1996/97	129,800	129,800	129,800
London actual totals	1997/98	132,061	132,061	132,061
London actual totals	1998/99	140,977	140,977	140,977
London actual totals	1999/2000	135,990	135,990	135,990
London actual totals	2000/01	143,530	143,530	143,530
London actual totals	2001/02	144,060	144,060	144,060
London actual totals	2002/03	149,110	149,110	149,110
London actual totals	2003/04	149,340	149,340	149,340
London actual totals	2004/05	153,700	153,700	153,700
London actual totals	2005/06	160,040	160,040	160,040
London actual totals	2006/07	161,440	161,440	161,440
London actual totals	2007/08	165,360	165,360	165,360
London projected totals	2008/09	168,540	169,638	166,792
London projected totals	2009/10	171,780	174,026	168,236
London projected totals	2010/11	175,084	178,528	169,692
London projected totals	2011/12	178,450	183,146	171,161
London projected totals	2012/13	181,881	187,884	172,643
London projected totals	2013/14	185,379	192,744	174,138
London projected totals	2014/15	188,943	197,730	175,646
London projected totals	2015/16	192,577	202,845	177,166
London projected totals	2016/17	196,280	208,092	178,700
London projected totals	2017/18	200,054	213,475	180,247
London projected totals	2018/19	203,900	218,997	181,808
London projected totals	2019/20	207,821	224,662	183,382
London projected totals	2020/21	211,817	230,474	184,970
Source: DMAG Education projections from Higher Education Statistics Agency (HESA), annual reference volumes 'Students in Higher Education Institutions, 1995/96 to 2007/08'				

Table A1.2 Actual and projected numbers of overseas domiciled full-time undergraduates attending Higher Education institutions in London

	Academic year	Rolling average ratio projections	High rolling average ratio projection	Low rolling average ratio projections
London actual totals	1995/96	24,030	24,030	24,030
London actual totals	1996/97	26,032	26,032	26,032
London actual totals	1997/98	28,160	28,160	28,160
London actual totals	1998/99	28,764	28,764	28,764
London actual totals	1999/2000	28,810	28,810	28,810
London actual totals	2000/01	27,010	27,010	27,010

London actual totals	2001/02	28,035	28,035	28,035
London actual totals	2002/03	29,730	29,730	29,730
London actual totals	2003/04	31,880	31,880	31,880
London actual totals	2004/05	34,410	34,410	34,410
London actual totals	2005/06	36,175	36,175	36,175
London actual totals	2006/07	37,360	37,360	37,360
London actual totals	2007/08	38,125	38,125	38,125
London projected totals	2008/09	39,665	40,509	38,483
London projected totals	2009/10	41,267	43,041	38,844
London projected totals	2010/11	42,933	45,732	39,208
London projected totals	2011/12	44,667	48,592	39,576
London projected totals	2012/13	46,471	51,630	39,947
London projected totals	2013/14	48,348	54,858	40,322
London projected totals	2014/15	50,301	58,287	40,701
London projected totals	2015/16	52,332	61,932	41,082
London projected totals	2016/17	54,446	65,804	41,468
London projected totals	2017/18	56,645	69,918	41,857
London projected totals	2018/19	58,932	74,289	42,250
London projected totals	2019/20	61,312	78,934	42,646
London projected totals	2020/21	63,788	83,869	43,046
Source: DMAG Education projections from Higher Education Statistics Agency (HESA), annual reference volumes 'Students in Higher Education Institutions, 1995/96 to 2007/08'				

Table A1.3 Actual and projected numbers of UK domiciled full-time postgraduates attending Higher Education institutions in London

	Academic year	Rolling average ratio projections	High rolling average ratio projection	Low rolling average ratio projections
London actual totals	1995/96	17,572	17,572	17,572
London actual totals	1996/97	18,401	18,401	18,401
London actual totals	1997/98	18,765	18,765	18,765
London actual totals	1998/99	18,920	18,920	18,920
London actual totals	1999/2000	19,530	19,530	19,530
London actual totals	2000/01	22,025	22,025	22,025
London actual totals	2001/02	22,665	22,665	22,665
London actual totals	2002/03	23,595	23,595	23,595
London actual totals	2003/04	24,650	24,650	24,650
London actual totals	2004/05	24,190	24,190	24,190
London actual totals	2005/06	25,205	25,205	25,205
London actual totals	2006/07	25,125	25,125	25,125
London actual totals	2007/08	25,415	25,415	25,415
London projected totals	2008/09	26,191	26,877	25,616
London projected totals	2009/10	26,991	28,423	25,819
London projected totals	2010/11	27,816	30,058	26,023
London projected totals	2011/12	28,665	31,787	26,229
London projected totals	2012/13	29,541	33,615	26,437
London projected totals	2013/14	30,443	35,549	26,646

London projected totals	2014/15	31,373	37,594	26,857
London projected totals	2015/16	32,331	39,756	27,070
London projected totals	2016/17	33,319	42,043	27,284
London projected totals	2017/18	34,337	44,461	27,500
London projected totals	2018/19	35,386	47,018	27,718
London projected totals	2019/20	36,466	49,723	27,937
London projected totals	2020/21	37,580	52,583	28,159
Source: DMAG Education projections from Higher Education Statistics Agency (HESA), annual reference volumes 'Students in Higher Education Institutions, 1995/96 to 2007/08'				

Table A1.4 Actual and projected numbers of overseas domiciled full-time postgraduates attending Higher Education institutions in London

	Academic year	Rolling average ratio projections	High rolling average ratio projection	Low rolling average ratio projections
London actual totals	1995/96	11,000	11,000	11,000
London actual totals	1996/97	12,418	12,418	12,418
London actual totals	1997/98	13,771	13,771	13,771
London actual totals	1998/99	14,669	14,669	14,669
London actual totals	1999/2000	16,200	16,200	16,200
London actual totals	2000/01	19,020	19,020	19,020
London actual totals	2001/02	21,110	21,110	21,110
London actual totals	2002/03	24,440	24,440	24,440
London actual totals	2003/04	26,805	26,805	26,805
London actual totals	2004/05	28,970	28,970	28,970
London actual totals	2005/06	30,365	30,365	30,365
London actual totals	2006/07	31,140	31,140	31,140
London actual totals	2007/08	33,075	33,075	33,075
London projected totals	2008/09	36,257	37,590	34,866
London projected totals	2009/10	39,746	42,722	36,754
London projected totals	2010/11	43,570	48,554	38,744
London projected totals	2011/12	47,762	55,183	40,842
London projected totals	2012/13	52,357	62,717	43,053
London projected totals	2013/14	57,394	71,278	45,384
London projected totals	2014/15	62,916	81,009	47,841
London projected totals	2015/16	68,970	92,069	50,432
London projected totals	2016/17	75,605	104,638	53,163
London projected totals	2017/18	82,879	118,923	56,041
London projected totals	2018/19	90,854	135,158	59,076
London projected totals	2019/20	99,595	153,609	62,274
London projected totals	2020/21	109,177	174,580	65,646
Source: DMAG Education projections from Higher Education Statistics Agency (HESA), annual reference volumes 'Students in Higher Education Institutions, 1995/96 to 2007/08'				

Appendix 5 – Typical University of London Rents (2012/13)

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	Daily Rate 2012/13	Weekly Rate 12/13
College Hall		
Single Study Bedroom (shared bathroom)	£27.25	£190.75
Single Ensuite	£32.75	£229.25
Double Ensuite	£39.50	£276.50
Connaught Hall		
Single Study Bedroom (shared bathroom)	£25.50	£178.50
Single Ensuite	£30.50	£213.50
Standard Twin (shared bathroom)	£19.00	£133.00
Large Twin (shared bathroom)	£20.50	£143.50
Double Studio (self catered)	£35.50	£248.50
Gardens Halls		
Hughes Parry Hall		
Single Study Bedroom (shared bathroom)	£24.75	£173.25
Twin (shared bathroom)	£18.50	£129.50
Large Single (shared bathroom)	£26.50	£185.50
Large Ensuite Single	£32.85	£229.95
Canterbury Hall		
York Single (shared bathroom)	£24.75	£173.25
Single Study Bedroom (bathroom shared between 2 residents)	£27.25	£190.75
Single Ensuite	£29.25	£204.75
Commonwealth Hall		
Single Study Bedroom (shared bathroom)	£24.75	£173.25
Twin (shared bathroom)	£23.75	£166.25
Large Single (shared bathroom)	£26.50	£185.50
Single Ensuite	£29.25	£204.75
International Hall		
Single Study Bedroom (shared bathroom)	£26.00	£182.00
Single Studio (self catered)	£31.25	£218.75
Double Studio (self catered)	£35.00	£245.00
Nutford House		
Single Study Bedroom (shared bathroom)	£23.00	£161.00
Large Single (shared bathroom)	£25.50	£178.50
Twin (shared bathroom)	£17.70	£123.90
Lillian Penson Hall		
Single Ensuite	£27.50	£192.50
Twin Ensuite	£18.50	£129.50
Double Ensuite	£35.00	£245.00
Single Studio (self catered)	£28.00	£196.00

Sum of all the six circled weekly costs = £1274.70

× 40 weeks ≈ £50,988

÷ 6 = £8498.

Appendix 6 - London Private Sector Student Halls Comparables (2012/13)

London Map Overview: Private Student Halls of Residence

Provider	Hall	Postcode	Map Ref	Total Rooms	Room type	Weekly Rent	Weeks	Annual Rent	Web link	Notes
Liberty Living	Liberty Fields	SE5 9LN	not shown	127						
					Single studio	£245.00	42	£10,290	http://www.libertyliving.co.uk/student-accommodation/london/liberty-fields/residence-information	
					Single studio	£235.00	51	£11,985		
					Single studio	£235.00	52	£12,220		
					standard studio	£250.00	41	£10,250		
					studio premium	£275.00	42	£11,550		
					standard studio	£245.00	51	£12,495		
	Liberty House	EC1V 0HF	s	188	en suite	£215.00	50	£10,750	http://www.libertyliving.co.uk/student-accommodation/london/liberty-house-sebastian-	
					small studio	£245.00	44	£10,780		
					small studio	£245.00	50	£12,250		
					studio	£269.50	43	£11,589		
					studio	£269.50	44	£11,858		
					studio	£269.50	50	£13,475		
	London Liberty House	EC1V 4AT	t	155	small studio	£245.00	44	£10,780	http://www.libertyliving.co.uk/student-accommodation/london/liberty-house-st-john-	
					small studio	£245.00	50	£10,780		
	EC1V 4AT				studio	£269.50	43	£10,780		
	2012/13				studio	£269.50	44	£10,780		
	Price from				studio	£269.50	50	£10,780		
	245				premium studio	£300.00	44	£10,780		
					premium studio	£300.00	50	£10,780		
					twin studio	£355.00	44	£10,780		
					twin studio	£355.00	50	£10,780		
Victoria Hall	Wembley Victoria Hall	HA9 0UU	not shown	435	en suite	£178.00	42	£7,476	http://www.victoriahall.com/london-wembley.html	
					studio	£218.00	42	£9,156		
					penthouse studio	£238.00	42	£9,996		
Nido	King's Cross	N1 1JP	u	1,045	single studio min	£260.00	51	£13,260	http://www.nidostudentliving.com/locations/kings-cross.aspx	
					single studio max	£315.00	51	£16,065		
					single studio min	£270.00	43	£11,610		
					single studio max	£325.00	43	£13,975		
	Spitalfields	E1 7HS	v	1,200	single studio min	£300.00	51	£15,300	http://www.nidostudentliving.com/locations/spitalfields.aspx	
					single studio max	£370.00	51	£18,870		
					single studio min	£310.00	43	£13,330		
					single studio max	£380.00	43	£16,340		
					twin studio min	£225.00	51	£11,475		
					twin studio max	£275.00	51	£14,025		
					twin bedroom studio min	£255.00	51	£13,005		
					twin bedroom studio max	£295.00	51	£15,045		
iQ	iQ Hoxton	E2 8AG	w	257	en suite min	£225.00	50	£11,250	http://www.iq-student-accommodation.com/student-accommodation/hoxton	
					en suite max	£255.00	50	£12,750		
					studio min	£270.00	50	£13,500		
					studio max	£320.00	50	£16,000		
iQ	iQ Shoreditch	N1 6AZ	ac	673	studio min	£255.00	50	£12,750	http://www.iq-student-accommodation.com/student-accommodation/shoreditch	
					studio max	£320.00	50	£16,000		
Urbanest	Urbanest Hoxton	N1 6AA	y	220	en suite	£239.00	50	£11,950	http://www.urbanest.co.uk/home/accommodation/london/hoxton.aspx	
					studio large	£299.00	50	£14,950		
					2 person flat	£218.50	50	£10,925		
Urbanest	Urbanest Tower Bridge	EC3N 1JA	z	150+	en suite	£199.00	50	£9,950	http://www.urbanest.co.uk/home/accommodation/london/tower-bridge.aspx	150 rooms reserved for LSE students
					studio	£299.00	50	£14,950		
Goodenough College	Goodenough College	WC1N 2AB	aa	268	standard	£159.00	50	£7,950	http://www.goodenough.ac.uk/home.html	accommodation for Postgraduates only
				161	en suite	£203.00	50	£10,150		472 single study (156 en suite)
				47	1 bed flats	£308.00	50	£15,400		76 couples & 33 families
				17	studio large	£259.00	50	£12,950		
				6	studio	£245.00	50	£12,250		
ISH	International Student House	W1B 1SH	ab	460+	en suite	£174.43	40	£6,977	http://www.ish.org.uk/accommodation/longstay-accommodation	long lets between 40 and 50 weeks
					standard	£160.31	40	£6,413		for international students
					twin en suite	£129.77	40	£5,191		states that provides 700 rooms but two
					twin standard	£115.02	40	£4,601		main hubs provide 460 long stay rooms
Student Housing Co.	Magenta House	E1 1DU	ad	187	en suite min	£199.00	51	£10,149	http://www.thestudenthousingcompany.com/Magenta-House/student-accommodation-in-	
					en suite max	£225.00	51	£11,475	london.html	
					studio	£250.00	51	£12,750		
Touchstone	Therese House	EC1A 4JN	ae		en suite	£210.00	51	£10,710	http://www.touchstonestudentliving.co.uk/accommodation/london/therese-house	
					en suite large	£215.00	51	£10,965		
					studio min	£230.00	51	£11,730		
					studio max	£305.00	51	£15,555		
Brittania Travel	Britannia City Student Living	SE16 2XG	af	77	standard min	£155.00			http://www.britanniatravel.com/halls.html	lets vary - minimum one semester
					standard max	£165.00				
					standard double (Single occ)	£175.00				
					standard twin (Single occ)	£185.00				
Fresh Student Living	Dashwood Studios	SE17 1JL	ag	232	studio min	£240.00	51	£12,240	http://www.freshstudentliving.co.uk/dashwood	
					studio max	£300.00	51	£15,300		

*amended to include internet cost

**rent refers to the instalment price

***electricity charge is not included

+ Quintain -

London Map Overview: Private Student Halls of Residence

Private Student Halls of Residence: Rents 2012/13

(the excel spreadsheets for the data below contain operational weblinks)

Provider	Hall	Postcode	Map Ref	Total Rooms	Room type	Weekly Rent	Weeks	Annual Rent	Web link	Notes
Unite	Canto Court	EC1V 9BD	a	164	studio	£299.00	51	£15,249	http://www.unite-students.co.uk/student-accommodation/london/canto-court?	
	Barthlomew Road	NW5 2BJ	b	54	studio	£249.00	50	£12,450	http://www.unite-students.co.uk/student-accommodation/london/bartholomew-road?	
					1 bed flat	£279.00	50	£13,950		
	Beaumont Court	NW1 0RW	c	232	en suite	£229.00	51	£11,679	http://www.unite-students.co.uk/student-accommodation/london/beaumont-court?	
					studio	£299.00	51	£15,249		
	Blithehale Court	E2 6FG	d	243	en suite	£219.00	50	£10,950	http://www.unite-students.co.uk/student-accommodation/london/blithehale-court?	
				63	studio	£269.00	50	£13,450		
	Charles Morton Court	N16 9BS	e	92	en suite	£199.00	51	£10,149	http://www.unite-students.co.uk/student-accommodation/london/charles-morton-court?	
					studio	£249.00	51	£12,699		
	East Central House	EC1V 3RH	f	246	en suite	£225.00	51	£11,475	http://www.unite-students.co.uk/student-accommodation/london/east-central-house?	
					studio	£299.00	51	£15,249		
	Kirby Street	EC1N 8TE	g	128	studio	£349.00	51	£17,799		
	Woodland Court	N7 9AW	h	499	en suite	£219.00	51	£11,169	http://www.unite-students.co.uk/student-accommodation/london/woodland-court?	
				74	studio	£259.00	51	£13,209		
	Great Suffolk Street	SE1 0NS	i	72	en suite	£269.00	51	£13,719	https://www.unite-students.com/student-accommodation/london/Great-suffolk-street?	
					1 bed flat	£499.00	51	£25,449		
				158	studio	£299.00	51	£15,249		
					2 bed flat	£269.00	51	£13,719		
	Woburn Place	WC1H 0AQ	j	458	1 bed flat	£549.00	51	£27,999	https://www.unite-students.com/student-accommodation/london/woburn-place?	
					studio	£389.00	51	£19,839		
					studio bed deck	£349.00	51	£17,799		
					2 bed flat	£299.00	51	£15,249		
	Elizabeth Croll House	WC1X 9AX	k	102	studio	£309.00	51	£15,759	http://www.unite-students.co.uk/student-accommodation/london/elizabeth-croll-house?	base prices for studios are from £309
					2 bed flat	£249.00	51	£12,699		
	Newington Court	N16 9DE	l	87	en suite	£205.00	51	£10,455		
					studio	£239.00	51	£12,189		
	Somerset Court	NW1 1AS	m	148	en suite	£239.00	50	£11,950	https://www.unite-students.com/student-accommodation/london/somerset-court?	
				20	1 bed flat	£399.00	50	£19,950		
					studio	£365.00	50	£18,250		
	Emily Bowes Court	N17 9FD	not shown	687	en suite	£165.00	50	£8,250	https://www.unite-students.com/student-accommodation/london/emily-bowes-court?	
					studio	£249.00	50	£12,450		
	Pacific Court	N15 4NU	not shown	142	en suite	£205.00	51	£10,455	http://www.unite-students.co.uk/student-accommodation/london/pacific-court?	
					studio	£259.00	51	£13,209		
	Quantum Court	E1 0DY	n	132	en suite	£199.00	51	£10,149	https://www.unite-students.com/student-accommodation/london/quantum-court?	
					studio	£249.00	51	£12,699		
	Julian Markham House	SE17 1JL	x	232	en suite	£179.00	50	£8,950	http://www.unite-students.co.uk/unite-	
	Rahere Court	E1 4DW	o	149	en suite	£199.00	50	£9,950		
				37	studio	£229.00	50	£11,450		
Derwent	Derwent Point*	EC1V 7LL	p	136	studio	£240.18	51	£12,249	http://www.derwentstudents.com/student-accommodation/London/Derwent_Point/	
					studio	£245.92	51	£12,542		
					studio	£247.83	51	£12,639		
Opal	Opal 3 The Arcade**	N7 0RY	q	365	standard	£179.50	51	£9,155	http://www.opalstudents.com/student-accommodation/london/the-arcade/features/	
					premium standard	£189.50	51	£9,665		
					standard plus	£194.50	51	£9,920		
	Opal 4 Tufnell Park**	N7 0EG	r	700	en suite	£205.00	51	£10,455	http://www.opalstudents.com/student-accommodation/london/opal-4-london-tufnell-park-	
					en suite plus	£215.00	51	£10,965	ofl/features/	
					deluxe en suite	£225.00	51	£11,475		
					studio	£249.00	51	£12,699		
					1 bed flat	£310.00	51	£15,810		
	Opal 2 McMillan**	SE8 3BU	not shown	824	studio min	£175.21	51	£8,936	http://www.opalstudents.com/student-accommodation/london/opal-2-mcmillan-student-village-	
					studio max	£223.02	51	£11,374	rmh/features/	

Sum of the 25 circled annual costs = £270,819

270 819 ÷ 25 = av £10832.76

Highest 269/week

Appendix 7 – Youth Insights Surveys on Student Experience

The student experience:
A report commissioned by UPP

Prepared by: Mia Lorenz & Louise Stacey
Date: 07.06.2012

Contents

Preface

The higher education sector is about to undergo it's most dramatic change in recent history. The increase of undergraduate tuition fees for home and EU students to £9,000 per year in England, coupled with a significant cut to the teaching grant for universities, heralds a new era for the university sector. This new era will be most pressing for students themselves; with the on-going economic difficulties and a bleak jobs market, students will be placing more emphasis on their higher education experience.

Whilst the furore and protests over the decision to raise tuition fees appear to have died down, the consequences of the reforms and what these mean for students are only just starting to emerge. Application figures through the Universities and Colleges Admissions Service (UCAS) for the first cohort paying the higher fees saw a drop in applications from the previous academic year. This is set against a trend of increasing growth over the last decade. The fall in applications takes place alongside the introduction of new competition for student places introduced by government which frees the ability for universities to recruit students with grades of AAB+, but also means that previous student number allocations for all universities have been reduced. This has led to suggestions from some universities that it could see the re-emergence of a two-tier system or a new 'squeezed middle' of institutions, but the intention from government is to extend choice to students and increase quality by competitive pressures on universities.

The student experience has of course always been an important, and indeed distinctive, part of UK higher education. Relatively high overall levels of satisfaction since the introduction of the National Student Survey, coupled with the rich history of students' unions and student-led volunteering, have been a hallmark of provision in the UK and have added to the reasons why it is held such high international regard. This will continue to be just as important in this more volatile environment.

For students themselves, it has been widely acknowledged that they will be arriving into higher education with increased expectations. A growing sense that a qualification itself will not be a guarantee of employment, but wider expectations of a top quality experience across the board from accommodation, to facilities and learning spaces.

This study places an equal emphasis on understanding the current experiences of students across their academic and broader experience, whilst also delving into the views of applicants intending to enter higher education in September 2012. Comparing the views and expectations of prospective and current students will be crucial in helping institutions to meet the demands of students in a new era. And provides a helpful pointer toward aspects of the learning and teaching, accommodation, student support, students' union and broader social experience that students consider as important and, crucially, which can still be improved. The findings clearly point to the importance of increased personalisation, support and emphasis on employability but also to high quality facilities on and off campus.

Although the broader higher education landscape remains fraught with unknowns and unresolved questions, this research will be a helpful contribution to institutions in helping them to deliver and improve the experience of current and future students.

Aaron Porter
Higher Education consultant

Introduction

The University Partnership Programme (UPP) was established in 1998 with the express intention of supporting universities in improving the quality of their physical infrastructure. The UPP approach involves the establishment of long term partnerships for the design, development, funding and operation of that infrastructure, and over the last 14 years UPP has procured £1.4bn of investment for university campuses. This has provided institutions with much needed residential, academic, administrative and social facilities during a period when improving the quality of services to students has become one of the foundations of many university strategies.

During that time UPP have housed more than 160,000 students across the UK and each year we ask for their opinions on all aspects of residential life. We undertake in-house online quantitative sampling as well as focus-group work to gain a detailed insight into how students think we are performing and what more we could be doing to improve their time in residence.

For UPP it was clear that as tuition fees increased so would the expectations of students across the whole range of university services. UPP has therefore commissioned YouthSight – with its expertise in student, youth & young professional research – to undertake an annual, independent focus group and survey exercise to investigate and compare the views of students enrolled at UK universities with current applicants for study. Focusing on both academic and social aspects of university life, it is our hope that this will ensure a better understanding of the gaps between expectations and current delivery.

Jon Wakeford
Director of Strategy and Communication
UPP Group Ltd

Research objectives & methodology

Research objectives

The aims of this phase were to explore in depth the student experience, both in terms of the academic aspects but more importantly, the social aspects, and in particular, views and requirements in terms of accommodation.

Specific objectives were to explore and understand:

- Why young people go to university
- What they most look forward to
- How they define the 'student experience'
- Their expectations in terms of the academic part of the student experience
- Their expectations in terms of the non-academic part of the student experience (the 'living' or social side)
- Their expectations around accommodation.

Brief overview of methodology

We conducted two focus groups, one with university students and one with applicants due to start their course in September 2012. The findings from these groups supported the development of a survey designed to explore every aspect of the university experience. The survey was carried out with 1,507 respondents divided almost equally between applicants and students.

A full description of the methodology can be found in Appendix 1.

Significant differences in tables and charts

In this report, statistically significant differences in data shown in tables are indicated by the colour of the table cell. A blue background indicates that the figure in that cell is significantly higher than any figure in the same row.

Where data is shown in charts, significant differences are highlighted by orange stars.

Executive summary

Introduction

The broad aim of this study was to explore in depth the student experience, both in terms of the academic and social/lifestyle aspects, as well as views and requirements in terms of campus facilities and accommodation. The report is split into four sections: motivations for going to university, the academic experience, the social/ lifestyle experience and campus facilities. This summary provides an overview of key themes that emerged across the findings.

Motivations for going to university are changing

The main reason young people are going to university is to improve their job prospects. It is likely that this is being fuelled by a poor economic situation with high unemployment, particularly amongst young people. Coupled with a greater personal responsibility for tuition fees, it seems to students are increasingly focused on a return on their investment in higher education. Nevertheless, what they most look forward to is the challenge of learning about their subject and a transformative experience that offers independence, new social connections and personal growth.

A reputation for academic excellence is crucial

There are no surprises in terms of what students initially look for when choosing a university. Top of the list is reputation for academic excellence, followed by reputation for a positive student experience.

The key expectations from the academic experience are that the subject will be interesting and that they'll have good lecturers and tutors. There's also considerable emphasis on the experience being challenging, flexible and supportive.

Concerns about the academic experience typically don't centre around the provision of portfolio or service so much as they do on a fear of not succeeding or finding things too difficult. Crucially therefore these young people need to be supported and given quality feedback to help them succeed and realise their potential.

Students and applicants define a positive academic experience as one where the subject is interesting and they have access to good quality lecturers and tutors. Concerns about this side of university life do not tend to focus on the university's ability to deliver these things, but rather on young people's confidence that they'll be able to achieve their academic goals. The things that are important to a good academic experience - quality of teaching, course content and structure, and quality of feedback - are however likely to help them build confidence and fulfil their potential. Unfortunately it is the quality of feedback that students are most dissatisfied with.

Expectations around employability support are high

Considering the pressure they're under, it's no surprise that young people actively expect universities to help them increase their employability. They're very aware that employers want work experience in addition to a degree these days, and are keen for universities to help them gain this experience. And while they want careers advice, CV clinics and so forth, they also expect universities to help them apply for jobs. Finally, a good many expect universities to find out what employers want and to teach these skills, indicating that employability is no longer the domain only of the university careers service. The challenge will be for universities to meet these expectations.

Making friends is essential to the university experience

Making friends, broadening horizons and 'growing up' are still essential elements of the student experience. While the study shows a more serious side to students and applicants there is undeniably still an interest in having a social life at university, but less so in hard partying. Is this dampened interest in having a vibrant social life a reality? Or are students less keen on being seen to express an interest in the social side of university life when the personal financial commitments have been significant? Only time will tell.

What young people say they're interested in is meeting people who share similar interests, as well as people from more diverse backgrounds or with different points of view. It is therefore very positive that the thing students are most satisfied with is "the friends they've met". On the downside, there are fairly high levels of dissatisfaction with the provision of places to socialise in and reasonable prices at these venues.

Young people's concerns about the non-academic side of university life typically revolve around affordability of the social scene, as well as fitting in. It is thus somewhat alarming that nearly a fifth (18%) of students don't feel supported with the non-academic side of student life.

Getting campus facilities right

The fact that the quality of academic facilities was not top of mind for most students and applicants when they were asked about what constitutes a positive academic experience might suggest that these are typically viewed as hygiene factors. Facilities are something that universities are simply expected to deliver on, which is evident from the fact that when there are no trade-off of factors involved, nearly every type of academic facility is deemed as important. Libraries are seen to be of prime importance, and while they're viewed reasonably well in terms of opening hours and location, they don't fare so well on size or staffing levels. Study areas, including those in libraries, are also very important.

In terms of non-academic facilities, accommodation is most important, followed by food and dining venues and the Student Union. Satisfaction with these could certainly be higher, indicating that there's room for improvement in each of these areas.

Conclusions and recommendations

Of the many insights to emerge from this report, one of the most interesting is the notion that **young people going to university are rather serious these days**. They're typically entering higher education to improve their job prospects and learn about their subject, and place less emphasis on partying. University is a significant personal financial investment for many, giving rise to a strong desire to ensure a return on that investment. Wider environmental factors such as high graduate unemployment and a country in a double-dip recession create even greater pressure to achieve a good degree. And given this pressure, **expectations about what universities will do to increase graduate employability are high**. The considerable pressures and challenges that students face will in turn impact the debate on how higher education is best delivered. This report addresses this debate.

The big question is, **how does the "study-life" balance work for today's students**? Financial pressure and for some, the need to work part-time work, means there may be less time available to socialise. Yet making friends, broadening horizons and gaining independence are fundamental to the university experience. What does this mean for provision of the non-academic side of university life? Satisfaction with provision in areas such as the Student Union and food venues is not as high as it could be, indicating a need for institutions to raise their game.

Academically the results tell us that **students want value good teaching and feedback on their progress**. This latter aspect is perhaps a marker for them to determine their ability to get a good degree and reach the end goal. We would suggest that more can be done in this area, as satisfaction with feedback is not especially high.

Many young people, and especially young women, are concerned about not being able to cope and finding things too difficult, as well as not fitting in and being able to make friends, which means that **pastoral support will also be increasingly important**. Although it isn't considered as overtly important, personalised support appears to be an underlying expectation for all aspects of university life, from academic support and assistance in the library to support with accommodation issues or finding work placements.

Students have always been cost-conscious, and our findings suggest that students, and especially applicants, place great emphasis on **cost and prices.** There's demand for bars, clubs, dining and entertainment venues to offer subsidised prices, but even more tellingly, young people desire chill-out areas where there's no obligation to make a purchase. How will institutions balance this with the increased need to monetise activities and balance institutional budgets?

Overseas students in particular desire to fit in and make new connections, and are especially unhappy with food and dining venues. With strong competition on an international level, institutions will need to ensure they're fully catering for these young people's needs.

What hasn't changed is that reputation is key to attracting students to a university in the first place. Students' needs in this area are quality lecturers and tutors, as well as an interesting and flexible course structure with clarity around the support provided and the feedback mechanisms in place.

Universities will want consider **investing in libraries and study areas** with sufficient space and staff, and improving feedback, and on the non-academic side, in **accommodation** and **social spaces** that make it easy, cheap and fun for young people to relax and socialise.

1: Motivations for going to university

Chapter overview

This chapter considers the following:

- Why young people go to university
- What they most look forward to

Reasons for going to university

We asked applicants and current students to identify the three main reasons they decided to go to university, and one of the most interesting findings in this study is the overwhelmingly high proportion of respondents who said that they are doing so to improve their job prospects. As illustrated in figure 1, almost 9 in 10 (88%) said this, with significantly fewer (57%) saying the main reason was to learn more about their subject.

Figure 1: Reasons for going to university

Base: All respondents, n=1507
QA1. What are the main reasons you decided to go to university? Please tick UP TO THREE answers that apply best.

This strong emphasis on career prospects will undoubtedly be a consequence of both wider environmental influences such as a weaker economy, and correspondingly tough employment prospects, as well as the changing higher education fee structure. It's likely that these pressures are increasingly causing students to seek a clearer return on their investment, as evidenced in YouthSight's February *2012 Applicant Survey*[1], which found that applicants are responding to higher fees primarily by seeking out higher quality. Other research by YouthSight[2] has shown the growing

"Pretty much for better job prospects and to meet new people, I'm looking forward to the social side" ***(Imogen, applicant)***

"I really like the subjects I do at school and would like to continue them, and eventually I'd like to be an English teacher, plus I'm looking forward to meeting new people and moving away from home" ***(Harriet, applicant)***

"It was kind of expected of me to go to uni" ***(Mussa, student)***

"Gaining the independence I've been desperate for and learning exactly what i want to" ***(Harriet, applicant)***

"Meeting new people, learning new skills and getting to know yourself better, being independent" ***(Mussa, student)***

"The social aspect and improving my knowledge of the subject" ***(Oli, applicant)***

[1] YouthSight (2012) *The Applicant Survey.* http://www.youthsight.com/media-centre/announcements/how-have-higher-tuition-fees-affected-the-decision-making-process-of-2012-applicants/

[2] http://www.youthsight.com/media-centre/research/roi-increasingly-driving-student-choice-even-among-the-aabs/

influence of employability factors. Our large annual survey of new starters at university, for example, has shown that, compared to previous years, the latest cohort of students were significantly more influenced by the prospect of future employability and earning potential than their peers in the previous four cohorts of new starters.

This desire to go to university to improve job prospects is paired with a relatively low interest in having fun (22%) and socialising (11%). Overseas fee payers are even less intent on these 'social' goals than their home fee paying counterparts, with half as many (12%) saying that having fun is one of their three main reasons for going to university. That said, they do seem equally interested in the opportunity to meet people and build social contacts.

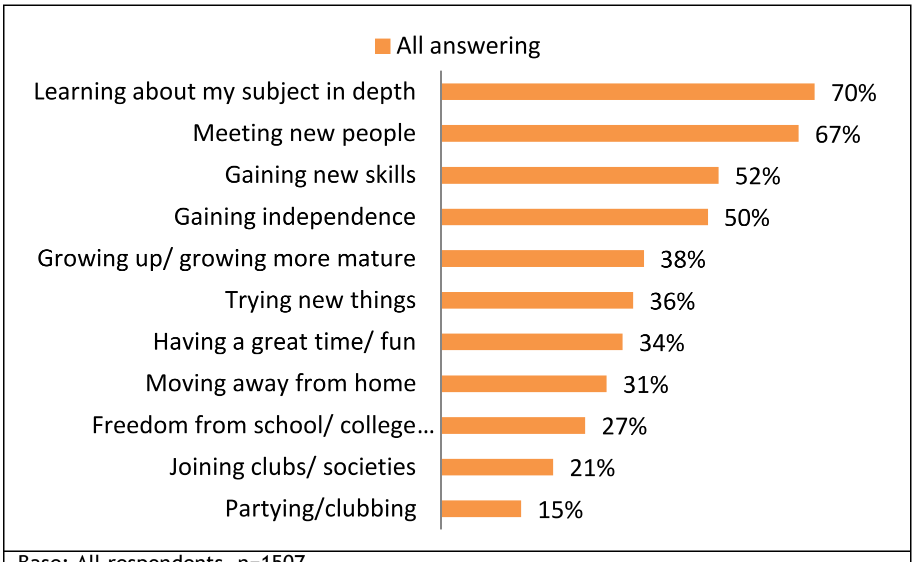
Young people also saw university as a time for personal growth and development with nearly two fifths each saying that they will gain independence (37%) and that it will be a life-changing experience (39%).

A significant minority (19%) said that their reasons for choosing higher education were because it was expected of them, suggesting it can still be a default option for some. Students at Russell Group universities were significantly more likely to say this (36%). This view was also more typical among overseas fees payers where one quarter of these students (26%) said this.

What young people most look forward to at university

Four key themes emerged when we asked young people what they most look forward to about university: exploration of their subject in depth (70%), sociability and meeting new people (67%), gaining new skills (52%) and independence (50%).

Figure 2: What young people MOST look forward to at university



Base: All respondents, n=1507
QA2 What were/are you most looking forward about going to university? Please tick UP TO FIVE answers that apply best.

Wanting to be in control and take responsibility for their own destiny was a recurring theme substantiated by nearly two fifths (38%) saying they relished growing up and becoming more mature, close to one third (31%) saying it was about moving away from home (31%) and more than a quarter (27%) saying they look forward to escaping school and college routines.

There seemed to be a sense of excitement about what lay ahead, a feeling perhaps that there was new territory to be explored. One third (36%) said they looked forward to trying new things. A similar proportion (34%) said that they expected it to be a great time and that they would have lots of fun. It would seem that there is a slightly greater emphasis on building social relationships through joining clubs and societies (21%) rather than partying and clubbing (15%).

Generally speaking, overseas fee payers and home fee payers said they looked forward to very similar things, the only difference being that overseas students placed more emphasis on learning new things (47% compared to 35% of home payers). This might in part be due to these students anticipating different cultural experiences, as well as educational ones.

Conclusion

These findings suggest that the strongest driver for entering higher education is improved job prospects. However young people also want to learn more about their subject, which suggests they want to be intellectually stimulated and challenged on their educational journey. And finally, they're looking forward to a transformative experience that offers independence, new social connections and personal growth.

The emphasis on job prospects is likely to be a by-product of wider environmental conditions including poor graduate employability and economic uncertainty. Combined with the changing fee structure for higher education, where repayment responsibilities will rest with students and their parents, and we seem to get a rather serious student who is intent on seeing a return on their investment. Alongside this change in motivations comes changing needs which for some universities might mean adapting offers to ensure these needs are met. In subsequent sections we explore these changing needs.

2: The academic experience

Chapter overview

This chapter considers the following:

- Factors that influence university choice
- Positive expectations about academic side of the university experience
- Concerns regarding the academic experience
- Defining a good academic experience
- Satisfaction with the academic experience
- How young people expect universities to boost their employability

Factors influencing university choice

Table 1 below illustrates the factors that young people said were important to their decision about which university to attend, split by students and applicants.

Table 1: Relative importance of factors influencing institution choice

	Reputation for academic excellence			League table ranking			Reputation for a good student experience			Reputation for a vibrant social life		
	Total	Applicant	Student	Total	Applicant	Student	Total	Applicant	Student	Total	Applicant	Student
	1507	*751*	*756*	*1507*	*751*	*756*	*1507*	*751*	*756*	*1507*	*751*	*756*
Very important	62%	66%	58%	28%	28%	27%	46%	52%	39%	14%	16%	12%
Quite important	34%	31%	37%	46%	49%	44%	46%	42%	50%	45%	48%	42%
NET important	96%	97%	95%	74%	77%	71%	92%	94%	89%	59%	65%	54%
Not very important	3%	2%	4%	19%	18%	21%	6%	5%	7%	29%	27%	31%
Not at all important	*%	*%	1%	5%	3%	7%	2%	*%	3%	11%	8%	14%
Don't know	*%	*%	*%	1%	1%	1%	*%	*	1%	1%	*	1%

Base: All respondents; applicants n=751, students n=756.

QA8. To what extent were/ are the following important or unimportant to you in deciding which university to study at?

Statistically significant differences highlighted by blue shading

Both students and applicants said it was the **university's reputation for its academic excellence, as well as its reputation for a positive student experience, that were the most important factors** when choosing which university to go to. Clearly academic excellence is the key measure, with virtually all (96%) students and applicants saying it was important, and more than three fifths (62%) saying it was very important. The majority of young people (92%) said a university's reputation for a good student experience was important, with close to half (46%) saying it was very important. Applicants hold stronger views about this than do students, with over half (52%) of applicants saying a good student experience was very important compared to two in five students (39%).

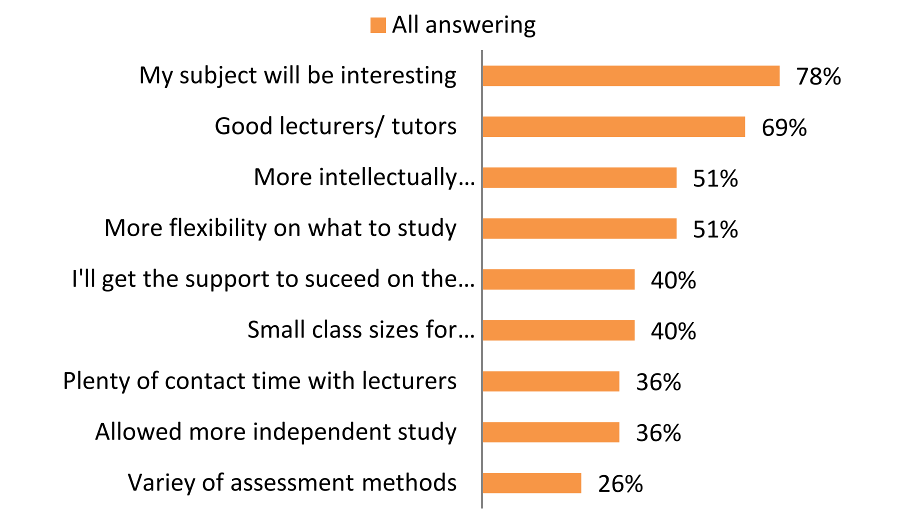
While fewer young people said league tables were important in making the decision regarding university choice, nearly three quarters (74%) regarded it as an important influence, with more than a quarter (28%) saying it's very important. Furthermore, while some might not overtly acknowledge that they place importance on league tables, a university's reputation for academic excellence is nevertheless affected by league table rankings.

Earlier we reported that a strong driver for young people to attend university is to improve their job prospects; it is therefore not surprising to find that reputation for a vibrant social life is of less importance. Only three fifths said this was important, with as many as 40% saying it was not important. What does this mean for universities in terms of social activities offered? Surely university life can't be all work and no play? One possible interpretation of these results is that there may be some unwillingness amongst students and applicants to explicitly claim to want to have lots of fun when both they (and their parents) are making a significant personal financial investment, and the return is yet to be realised.

Positive expectations about the academic experience

To help define what constitutes the optimum academic experience, respondents were asked to pick five priorities from a list of positive expectations about the academic side of the university experience.

Figure 3: Positive expectations about the academic experience



Base: All respondents, n =1507.
QB1.What were/are your positive expectations about the ACADEMIC side of the university experience? Please tick UP TO FIVE answers that apply best.

The **top five positive academic expectations** are that the subject will be interesting (78%), there will be good lecturers/tutors (69%), that it will be more intellectually challenging than school/college (51%), there will be more flexibility on what to study (51%) and that there will be support to succeed on the course (40%).

There are a few differences between applicants and students here, with students placing more emphasis on good lecturers/tutors (74% v 65%) and it being intellectually challenging/stimulating (55% v 48%). Applicants were significantly more likely than students to say they wanted flexibility on what to study (57% v 44%) and get the support needed to succeed (45% v 36%). Can these differences perhaps be attributed to students' views changing because of their experiences to date in university life, or is it that applicants have a different focus based on the changing HE landscape? For this only time will tell.

"A good academic experience has to be quite varied... with different modules and examination methods"
(Harriet, applicant)

"A good academic experience for me would be to not feel as though I learnt everything just to pass an exam - the lecturers should cover a broad range of topics but try to ignite enthusiasm at the same time"
(Will, student)

"Help and support if I find a particular subject difficult"
(Oli, applicant)

"[I want support from] tutors/lecturers so that you develop a working relationship with them so they know your strengths and weaknesses and can help you improve"
(Harriet, applicant)

"[Lecturers] should be there for you - they should be accessible when you need them either by mail or face to face"
(Mussa, student)

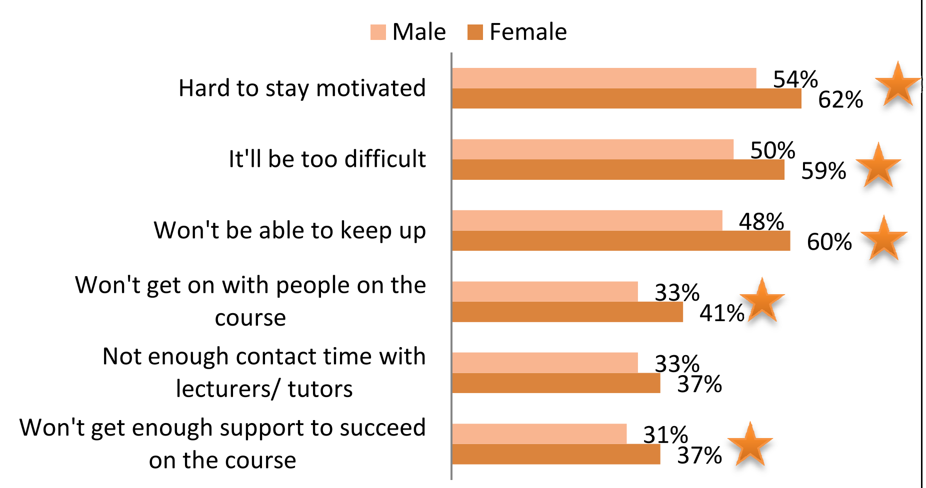
YouthSight

Concerns about the academic side of the university experience

It is interesting that the **key concerns** that students and applicants have about the academic side of the university experience were not typically linked to the university provision service or portfolio, but rather related to young people's ability to achieve success. This may suggest that they're lacking in confidence, which is possibly exacerbated by the looming pressures to get a good degree to help secure employment.

The top five concerns were: it being hard to stay motivated for independent study (58%), it being too difficult (55%), not being able to keep up (55%), not getting on with people on the course (37%), and not enough contact time with lecturers/tutors (35%). Interestingly, while there were no significant differences between students and applicants, in all cases, young women expressed much higher levels of concern compared to young men, as illustrated in figure 4.

Figure 4: Concerns about the academic side of the university experience, by gender

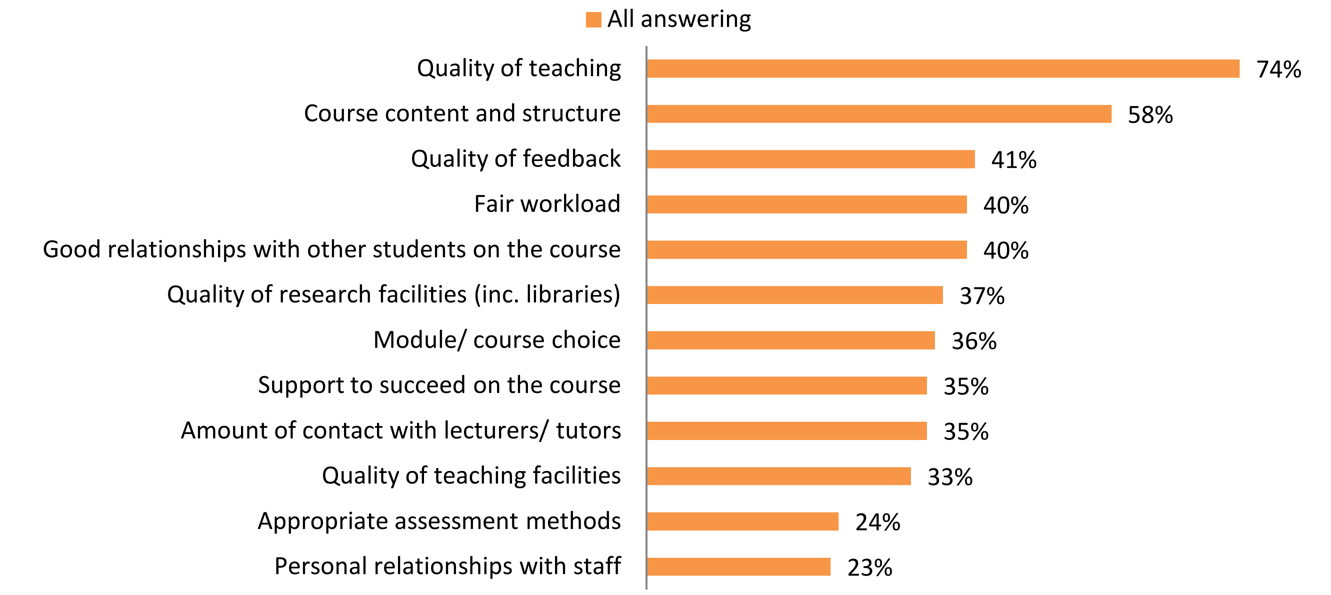


Base: All respondents; male n=678, female n=829.
QB2. What were/ are your biggest concerns about the academic side of the university experience? Please tick UP TO FIVE answers that apply best.
Statistically significant differences: Indicated by orange stars.

The definition of a good academic experience

To understand what makes a good academic experience, respondents were shown a list of criteria and asked which five criteria they felt were important.

Figure 5: Defining a good academic experience



Base: All respondents, n =1507.
QB3.Some young people like you have told us what they consider to be a good academic experience at university. How important are these things to you? Please tick UP TO FIVE things that you consider most important.

Top of the list was the **quality of teaching** with three quarters (74%) saying it is important. This aspect was explored in detail in the focus groups, where young people described good quality university teaching as a combination of the lecturer's personality and ability to structure and deliver the content well, using a range of different teaching methods. It was also evident that their appreciation of the range and usefulness of teaching methods was quite sophisticated – for instance they understand that different people learn better in different ways. Contact time, especially in small group and 1:1 settings, was seen as highly desirable.

For nearly three fifths (58%) the **course content and structure** were important elements of the academic experience. More in-depth discussions in the focus groups revealed that in terms of content, young people want the subject made interesting, with a range of topics covered. On the other hand in terms of structure, they wanted to know where they were going - a logical flow of content, modules that build on one another - and a good mix of content. For combined courses there's strong demand for a "true combination", not just modules that are studied separately from one another. They also wanted choice in topics and modules.

Roughly two fifths mentioned **the quality of feedback** (41%), a fair workload (40%), good relationships with other students on the course (40%), the quality of research facilities (including libraries) (37%) and the module/course choice (36%) as important ingredients in good academic experience.

There were significant differences between students and applicants, with students placing greater emphasis on course content and structure (61% v 55%) and on quality of feedback (45% v 36%) than applicants. Applicants on the other hand prioritised good relationships with other students on the course (43% v 36%) and being supported to succeed on the course (41% v

"Sense of humour, voice which doesn't send you to sleep, some kind of expression/movement"
(Luke, student)

"Involves everyone, seems passionate about the subject, helps develop students' passions and improve"
(Jamie, applicant)

"Good quality lecturers that are knowledgeable in the subject and willing to help outside of hours, seminars that delve into the subject deeper so you understand more"

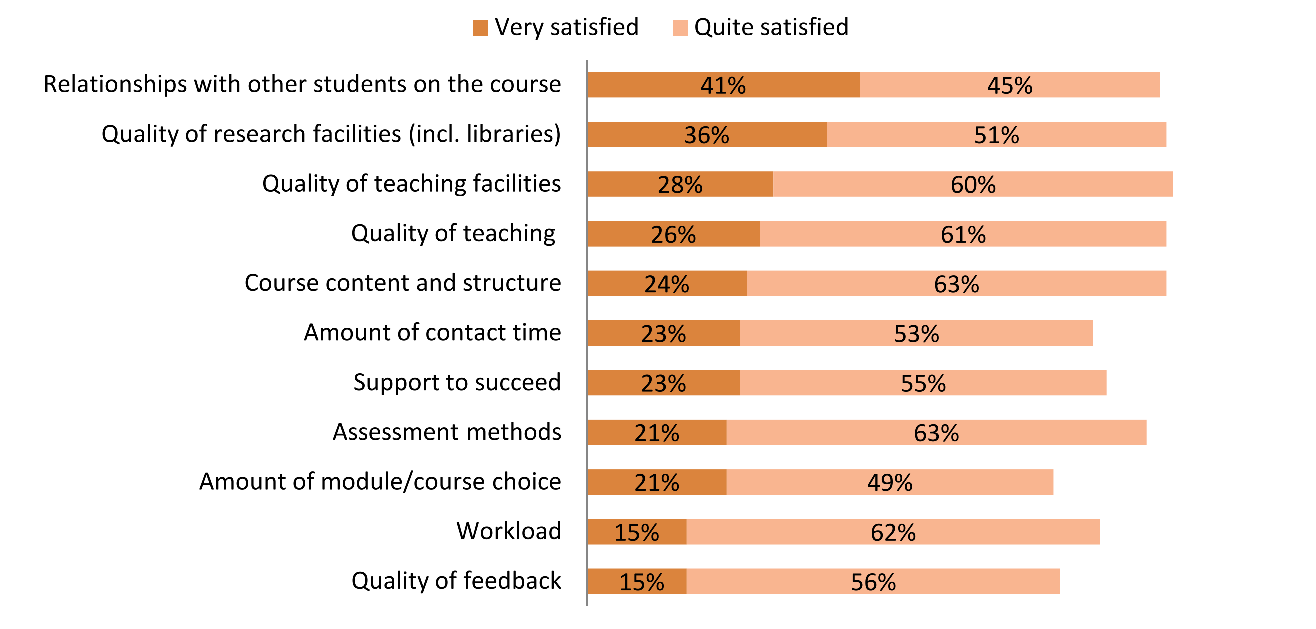
(Benitia, student)

29%). This difference is possibly driven by students' actual experiences of higher educations. There were no significant gender differences.

Satisfaction with the academic experience (students)

While overall 'net' satisfaction levels (i.e. very satisfied plus quite satisfied) are high, there's quite a bit of discrepancy across satisfaction measures in terms of the proportion of respondents giving a top box ("very satisfied") rating. Those areas not achieving a high top box rating can be considered as areas where improvement is needed. It is also useful to consider these levels of satisfaction in line with those areas that students referenced as being key ingredients in a good academic experience.

Figure 6: Satisfaction with various elements of the academic experience



Base: All students, n=756.
QB4.How satisfied are you with the academic experience so far?

Quality of teaching, course structure and content, and quality of feedback were the top 3 areas are important to a good academic experience. Overall satisfaction is high in terms of the quality of teaching and quality of course content/structure, with 87% of students saying they were satisfied with each of these areas. However, there is some room for improvement as only one quarter said they were "very satisfied". More critically these results would suggest that the quality of feedback needs to be addressed as it had the lowest overall level of satisfaction at 71%, with only 15% saying they were "very satisfied".

Employability

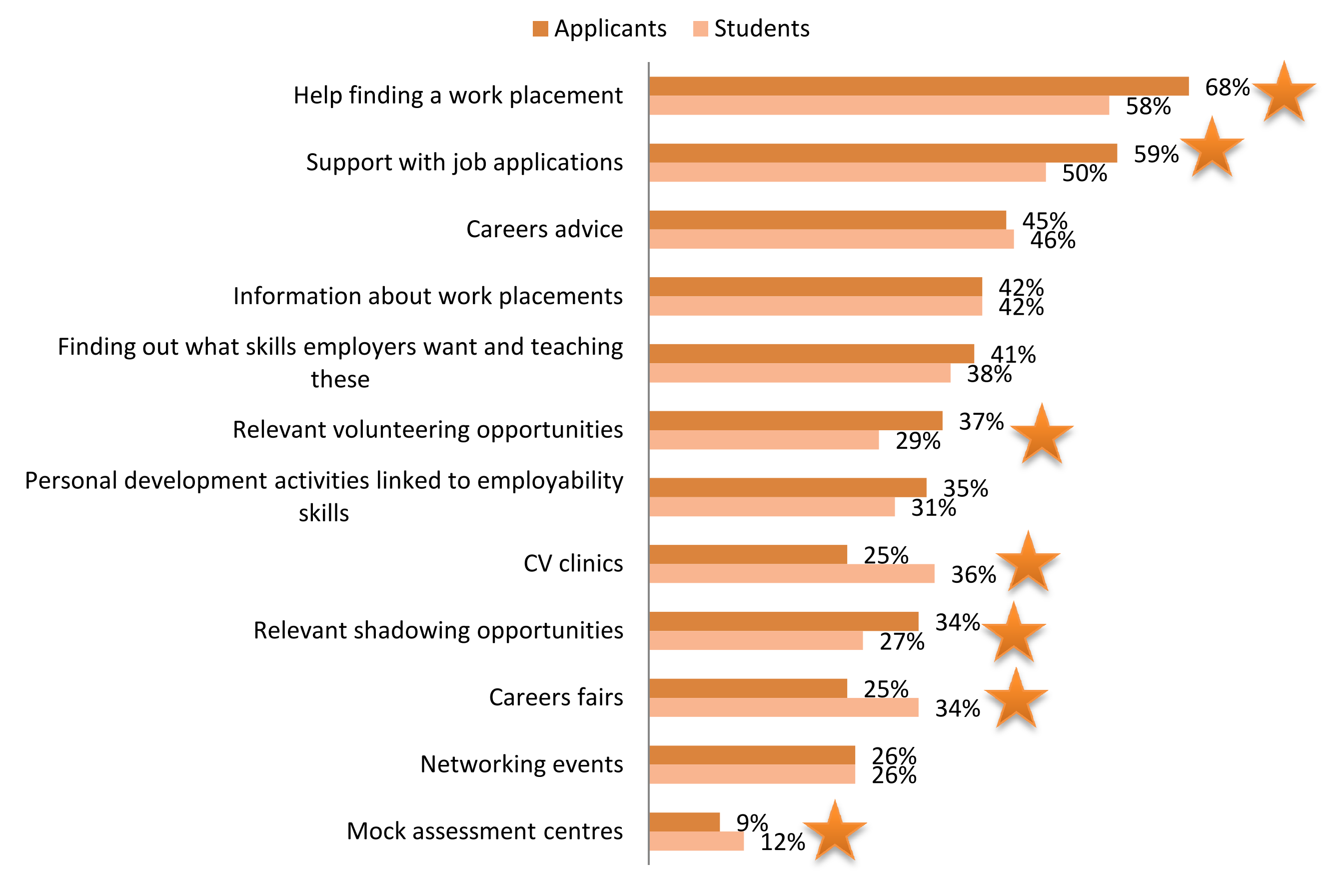
The focus groups we conducted prior to developing the questionnaire for the survey indicated that boosting employability seems to cut across the academic and pastoral domains, in the sense that young people expect universities to find out what employers want and transmit those skills, and that they're aware that employers want work experience in addition to a degree. However they also wanted traditional things like careers advice and CV clinics.

"They should find out and teach the skills that employers are looking for"
(Will, student)

"Helps you find relevant work experience and helps when you leave… doesn't just say 'Bye!' once you have your degree"
(Tayla, applicant)

In the survey, young people laid the most emphasis on work placements and other ways of gaining on-the-job experience, including help finding a placement (63%), information about placements (42%), relevant volunteering opportunities (33%) and relevant shadowing opportunities (30%). Applicants valued these activities even more than students did, as illustrated in figure 7.

Figure 7: What young people expect from universities to boost their employability



Base: All respondents; applicants n=756, students n=751.
Thinking about the things universities can do to improve your EMPLOYABILITY PROSPECTS, which are most important to you? Please tick UP TO FIVE things that you consider most important
Statistically significant differences: Indicated by orange stars.

Another area of emphasis was on what might be termed more traditional careers support, but with the added twist that universities should help with job applications (55%) in addition to providing careers advice (45%), personal development activities tied to employability skills (33%), CV clinics (31%), careers fairs (30%) and mock assessment centres (10%). Students were significantly more interested than applicants in some of these more traditional areas, such as CV clinics and careers fairs. It may be the case that their expectations are tempered by what is actually on offer, whereas applicants are hoping for more personalised support.

There were few differences between home and overseas fee payers, or by mission group.

Conclusions

A reputation for academic excellence trumps other choice factors, and especially social life, again reinforcing the finding that these young people are primarily viewing their time at university in instrumental terms, as a means to an end (a better job, higher salary, etc). In terms of the academic experience, expectations are high, especially of lecturers and tutors, but also in terms of flexibility when studying and getting enough support to succeed.

While we have seen the key ingredients to a good academic experience typically relate to service delivery in terms of the quality of staff delivering tutorials and seminars, being kept interested and being stimulated by the subject, the key concerns tend to centre on how the student or applicant is feeling personally, and they express fears about being able to keep up and stay motivated. These are indications of young people lacking confidence in their abilities, more typically the case for female respondents. This is possibly being exacerbated by the looming pressures to get a good degree to help secure employment, and the high personal financial commitment.

Considering the pressure they're under, it's no surprise that young people actively expect universities to help them increase their employability. They're very aware that employers want work experience in addition to a degree these days, and are keen for universities to help them gain this experience. And while they want careers advice, CV clinics and so forth, they also expect universities to help them apply for jobs. Finally, a good many expect universities to find out what employers want and to teach these skills, showing that employability is no longer considered the domain only of the university careers service. The challenge will be for universities to meet these expectations.

Young people tended to see the key ingredients of a good academic experience as quality of teaching, the course content and structure and quality of feedback. It is the latter that seems to be in most need of improvement.

3: The social/lifestyle experience

Chapter overview

This chapter considers the following:

- Positive expectations about the non-academic side of the university experience
- Concerns regarding the non-academic experience
- Defining a good non-academic experience
- Satisfaction with the non-academic experience

Positive academic expectations of the university experience

Earlier we reported a more serious side to students and applicants, who while undeniably interested in the social side of university life seem more intent on learning and less so on partying. This section of the report looks to define the optimum non-academic experience, and to help elicit this information, respondents were asked to pick five items from a list of positive expectations about the non-academic side of the university experience.

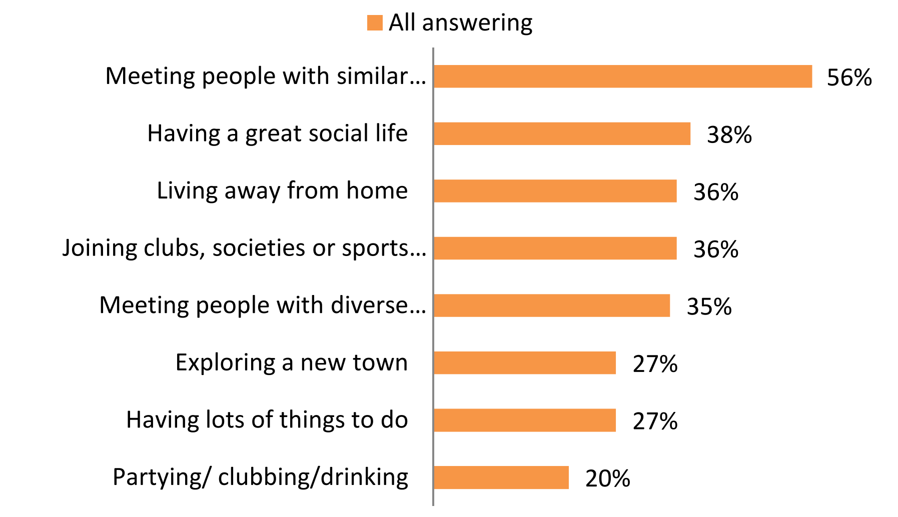
"Meeting people from a variety of backgrounds" *(Tayla, applicant)*

"Having lots of things to do, like societies, and events that come with living in a bigger city" *(Luke, student)*

"Have a good time without the need for alcohol (except occasionally ;))" *(Will, student)*

"Living with people who do all sorts of courses" *(Harriet, applicant)*

Figure 8: Positive expectations about the non-academic experience



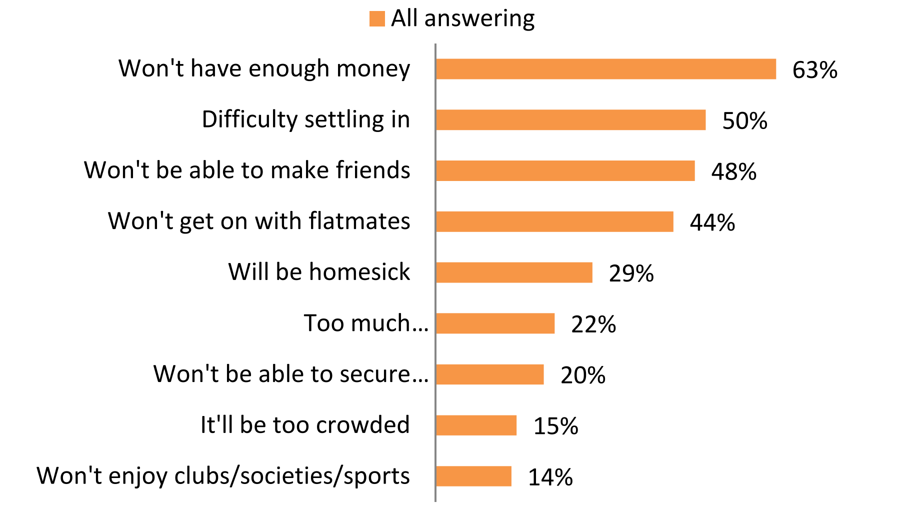
Base: All respondents, n =1507.
QC1.What were/are you positive expectations about the NON- ACADEMIC side of the university experience? Please tick UP TO THREE answers that apply best.

The top five positive non-academic expectations are meeting people with similar interests (56%), having a great social life (38%), living away from home (36%), joining clubs, societies or sports teams (36%) and meeting people with diverse backgrounds or points of view (35%). This desire to meet both like-minded people *as well as* people with diverse backgrounds was also voiced quite strongly within the focus groups, and appears to be an essential element to the horizon-widening aspect of the university experience. Partying/clubbing/drinking are bottom of the list, with only 20% saying these were among their top 5 expectations.

Some differences are evident by the type of university attended. Students at Million+ universities were significantly less likely than others to say that living away from home was amongst their top 5 positive expectations (only one quarter said this, compared to 36% of students as a whole, reflecting the higher proportion of students at modern universities who live at home). Students at 1994 Group and especially Russell Group universities were significantly more likely to count joining clubs and societies amongst their top five expectations.

The greatest concern amongst students and applicants was that they would not have enough money. More than three fifths (63%) expressed this concern, with applicants significantly more concerned than students (68% v 58%). Students at Million+ and Alliance universities were also more concerned than others (64% and 67% respectively).

Figure 9: Concerns about the academic side of the university experience



Base: All respondents, n =1507.
QC2.What are/were your biggest concerns about the NON-ACADEMIC side of the university experience? Please tick UP TO FIVE answers that apply best.

> **"I am worried into getting pushed into getting drunk" *(Stephanie, applicant)***
>
> **"I was scared I wouldn't make friends but that quickly went away when I got here, my housemates were amazing" *(Callum, student)***

Half of respondents (50%) had fears about settling in, and a similar proportion (48%) worried about not being able to make friends and not getting on with their flatmates (44%).

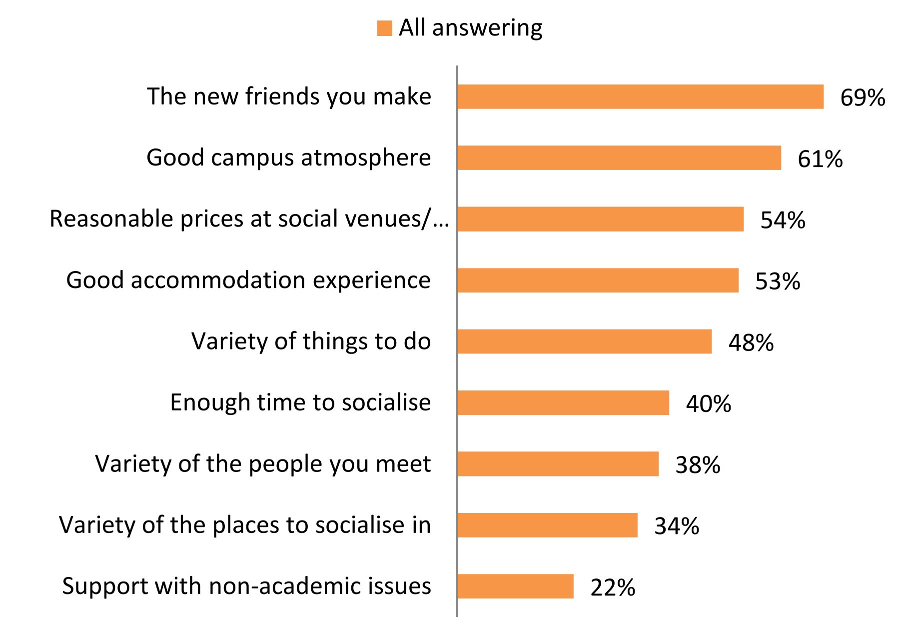
We reported earlier that female respondents were more anxious about some of the academic aspects than their male counterparts. Here too young women are seen to be more worried about the difficulties they might have settling in (53% v 45%), being able to make friends (54% v 41%), inability to get on with flatmates (47% v 41%), and being homesick (35% v 22%).

Although these are not among the top five concerns, too much partying/drinking and pressure to drink were chosen by more than one fifth of students as a top concern (22% each). While there are no significant differences by gender, there are elevated levels of concern amongst students at Russell Group universities, with 30% concerned about too much partying and drinking compared to 22% of students overall, and 27% worried about being pressured to drink compared to 20% of students overall. On both these measures Million+ students were least concerned (16% and 11% respectively).

The definition of a good non-academic experience

To understand what makes a good non-academic experience, respondents were shown a list of criteria and asked which five they felt were most important.

Figure 10: Things important for a good non-academic experience



Base: All respondents, n =1507.
QC3.Some young people like you have told us what they consider to be a good NON-ACADEMIC experience at university. How important are these things to you? Please tick UP TO FIVE things that you consider most important.

Young people defined the top five ingredients in a good non-academic as the new friends you make (69%), a good campus atmosphere (61%), reasonable prices at social venues/affordable social activities (54%), a good accommodation experience (53%) and a variety of things to do (48%).

Again we see most importance socially being on meeting people and forming relationships, with young women placing more emphasis on this aspect than young men (72% v 65%).

Applicants were significantly more likely to emphasise a good campus atmosphere, reasonable prices and a good accommodation experience - again pointing to potentially higher price sensitivities on their part.

Compared to all students, those at Russell Group and 1994 Group universities placed greater importance on a good accommodation experience and having enough time to socialise. 52% of Russell Group students and 62% of 1994 students said a good accommodation experience was important compared to 47% overall. Around half of Russell Group students (48%) and 1994 students (52%) felt it important to have enough time to socialise, compared to 39% of all students.

These results indicate that finding a balance between study and a social life may be difficult for students of the future, particularly as some may also need to resort to part-time jobs to help pay their way.

Although support with non-academic issues comes bottom of the list in terms of importance, given the concerns expressed by applicants and students plus the pressures they're putting themselves under to reach their goals, this support needs to be in place, and accessible to students. Our focus group work indicates that support to succeed is almost taken for granted.

Interesting too, pastoral support does not arise spontaneously in the focus groups as part of the 'social/living' experience; like campus safety, it's a

"[You need support because] you're away from home, so lacking the parental support and guidance" ***(Jamie, applicant)***

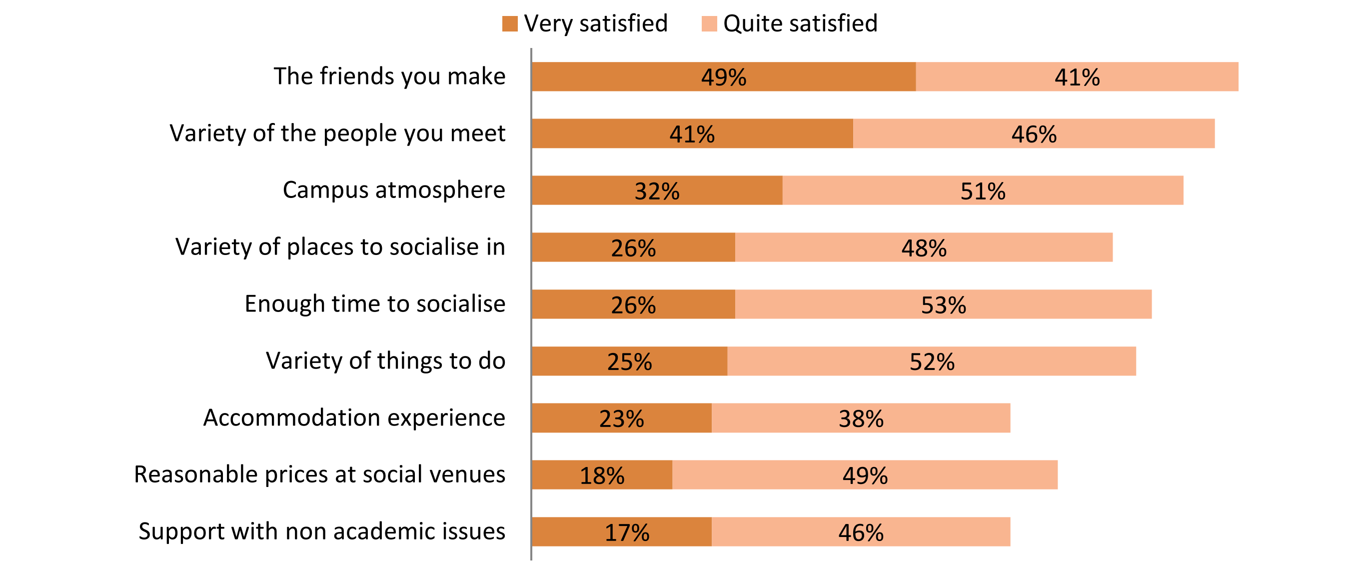
"A personal tutor that you can talk to about anything" ***(Imogen, applicant)***

utility they simply expect institutions to provide. They do not necessarily differentiate non-academic and academic support. What we have found is that they want personalised support with *any* issue that arises, regardless of what it is. Personal tutors are seen as the key contact point - and the desire is for tutors who you feel comfortable enough with to discuss any issue, and who have the patience even for trivial issue.

Satisfaction with the non-academic experience (students)

Students reported most satisfaction with new friends they've made (90%), the variety of the people they've met (87%) and the campus atmosphere (83%). Encouragingly, the first two of these are also considered key elements of a good non-academic experience.

Figure 11: Satisfaction with various elements of the non-academic experience



Base: All students, n=756.
QC4. How satisfied are you with the non-academic experience so far?

However, as many as one quarter (25%) of students were dissatisfied with the availability of reasonable prices at social venues, and affordable social activities. This cut across students from all universities.

In the focus groups too, respondents expressed a need for affordable social venues. They'd particularly like social/chill-out areas that don't require them to make a purchase in order to use the facility. As with other facilities, the top priority is cleanliness, followed by sufficient space to prevent crowding, a casual and comfortable atmosphere, modern décor and reasonable noise levels. For venues that sell things, young people want prices that are cheaper than the high street but can compete in terms of quality

> **"If alcohol prices were lower in bars and clubs, then people wouldn't constantly have to drink at home before going, which can lead to ruining the night :/" *(Will, student)***
>
> **"Somewhere you can go to just sit and not feel like you have to buy something" *(Benitia, student)***

One fifth (21%) were disappointed by the provision of places to socialise in. Given the levels of concern about interpersonal relationships, and the ability to form these and fit it, it is perhaps worrying to see that as many as one fifth (18%) of students do not feel supported with non-academic issues. Male and female students felt equally unsupported. The same proportion (18%) also said they were disappointed with their accommodation experience. Dissatisfaction was consistent across students from all types of university attended.

Conclusions

In summary the key ingredient of a good the non-academic experience is the people. The campus facilities, atmosphere and being able to afford a social life also play an important role.

Young people are clear that the people you meet and connect with are critical for the enjoyment of the social side of university life, and it is reassuring that, by and large, this is an area that students are contented with.

However, there was criticism of the high and unaffordable prices at some of the social venues which in our view could potentially hinder social scenes and hence the building of networks and relationships.

Key concerns tended to centre on the ability to form relationships and fit in, and are possibly linked to confidence as well as self-belief or self-esteem issues (and were much more prevalent amongst females). Unfortunately, the biggest area of dissatisfaction was support with non-academic issues, suggesting that there is a mismatch in terms of students' current needs and how well they're being met.

4: Campus facilities

Chapter overview

This chapter considers the following:

- Preferences regarding campus style and location
- How important the quality of campus facilities is
- How students rate their academic facilities
- Which kinds of facilities are most important to having a great time at university
- What is important in terms of campus atmosphere
- Satisfaction with campus facilities
- Accommodation preferences

Preferences for campus or non campus style universities

Nearly half (47%) of respondents said they prefer a campus-style university and a further 42% were happy with either setting, equating to nearly 9 in 10 who are potentially interested overall in a campus-style setting. Only 7% said they wanted to go specifically to a "non-campus" setting but when combined with those who are happy with either, half of respondents are potentially interested in a "non-campus" environment. Students at 1994 Group universities are far more interested in a campus setting (58% v 47% of all students).

Among those who said they prefer a campus setting, there's a fairly even split between those who said they prefer a self-contained campus (45%) and those who prefer a city-based campus (47%). Our focus group work confirms this: there was no definite preference for strictly city or strictly campus style universities – some prefer one, some the other.

However, quite a few prefer a campus structure and feel *within* a city.
City universities are typically preferred by those who want immediate access to non-university life, who wanted to get away from a small-town atmosphere, don't want to be constrained by transport considerations and dislike student-dominated towns. Campus universities are preferred for easy access to all university facilities, tranquillity and lack of crowds.

"I want a uni where all the buildings are close (walkable from each other) but in a city" ***(Imogen, applicant)***

"I wanted a city university with a campus sort of feel" ***(Callum, student)***

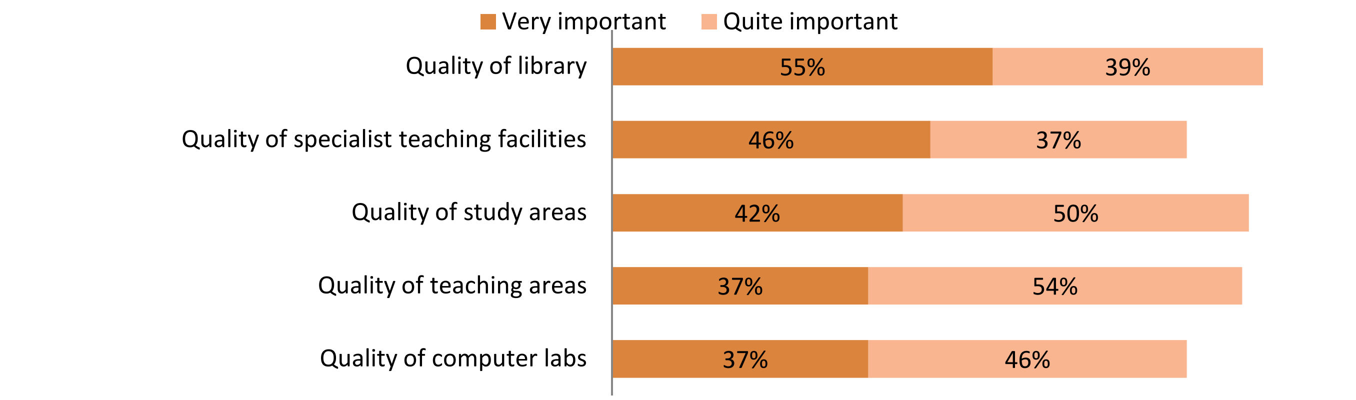
"I chose Kent [because it's] a massive single campus" ***(Mantas, student)***

"City is really important to me because I live in a tiny village and it gets so boring, I want that dramatic change!" ***(Harriet, applicant)***

Quality of academic facilities

In section 2, the quality of academic facilities was not seen as a priority in terms of delivering a good academic experience. However, when specifically questioned about the importance of various academic facilities, a significant proportion believed each of these to be either very or quite important. This is in part down to the question style: in defining a good academic experience, we asked respondents are asked to identify the five most important elements. Here there was no such trade-off, and respondents were able to simply assign an importance score to each type of facility. It is important to bear this in mind when viewing the chart below.

Figure 12: Importance of the quality of various campus facilities (academic)



Base: All respondents, n=1507
QB5.Thinking about your academic experience, how important do you think the quality of the campus facilities is/will be?

It is the quality of the library that respondents feel most strongly about, with over half saying it is "very important". Broadly speaking, applicants and students have similar views on what is important.

Earlier we reported that female respondents worried more about being able keep up, finding the academic work too difficult and their motivation levels. It is interesting too that they place more importance on some of the tools required to help them succeed. For instance they're significantly more likely than male respondents to say that the quality of the library is "very important" (61% v 48%) and that the quality of study areas is "very important" (44% v 39%). Male respondents on the other hand were more likely to say the quality of computer labs is "very important" (41% v 35%).

There are a few differences by the type of university students attend. Million + and Alliance students were more inclined to say that the quality of the computer labs was "very important" compared to other students (51% and 49% respectively, compared to 41% on average). Students at Guild HE institutions placed greater importance on the quality of specialist teaching facilities (60% said this was very important" v 42% on average).

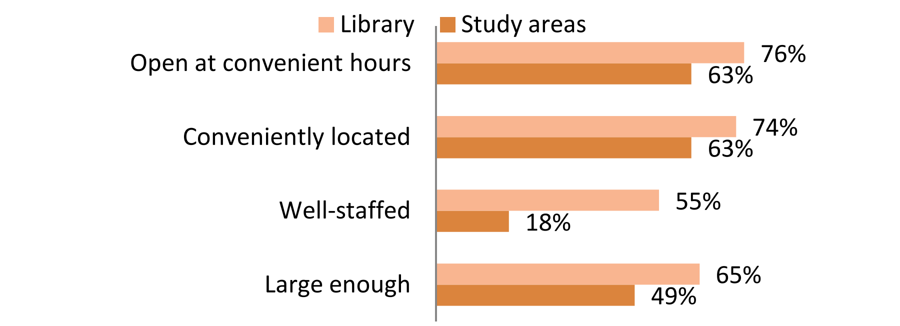
We also asked current students to rate their academic facilities on a range of attributes such as convenience and staffing levels. Figure 13 illustrates these ratings for two of the most important academic facilities, i.e. the library and study areas.

"Libraries are important, I find it harder to study in my house/room as I get distracted easily" *(Imogen, applicant)*

"Enough equipment like computers and a good environment to work in" *(Alexandra, student)*

"The college I'm at at the moment is ancient with rubbish facilities, but everyone is so lovely and helpful and I think that's the most important thing" *(Jamie, applicant)*

Figure 13: How students rate their libraries and study areas



Base: All students, n =756
QB6.How would you describe your academic facilities? Library is… Study areas are…

While students rated libraries reasonably well on being open at convenient hours and conveniently located (76% and 74% respectively), only two thirds (65%) felt they were large enough and just over half said their library is (55%) well-staffed.

Study areas fared reasonably well on being open at convenient hours (63%) and conveniently located (63%) but only half (49%) felt that they were large enough and not quite one fifth (18%) felt they were well staffed. The low proportion for the latter point might be to do with some study areas not needing to be staffed full-time.

In the focus groups we had a more in-depth look at what students want from libraries and study areas. Many of the things that apply to academic facilities generally also apply to libraries and study areas: they should be clean, well-maintained, well-lit, spacious, up-to-date and pleasant to spend time in. However in this case they should also not be too loud or crowded.

Study areas tended to be discussed together with libraries and are seen as an essential part of a library; however, study areas in halls are also a popular concept. Young people very much want a mix of study areas to cater to different kinds of study (solo, in groups), and they very much appreciate these when they have them. In terms of the equipment required in study areas, they should include power points for laptops as well as computers and printers. The library should be well-stocked with books, journals & archives, and should provide printing facilities. Finally, young people expect friendly and helpful library staff who provide lots of personalised support. This reinforces once again the finding that personalised support is expected in almost every university context.

"Facilities do have to be good enough to compete with what else is out there"
(Imogen, applicant)

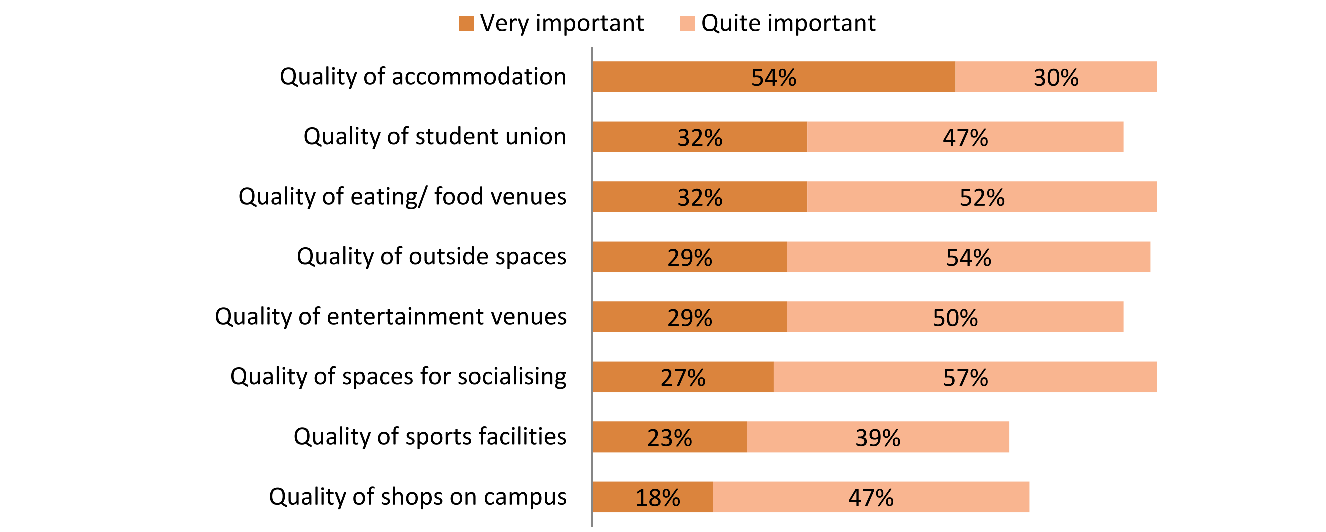
"I think cafes, eating facilities is a must but also somewhere you can go to just sit and not feel like you have to buy something"
(Benitia, student)

"Where you can eat and talk without really loud music which makes it hard to talk"
(Mantas, student)

Quality of non-academic facilities

As with academic facilities, importance ratings for non-academic facilities rise when no trade-offs are involved, as illustrated in figure 14.

Figure 14: Importance of the quality of various campus facilities (non-academic)



Base: All respondents, n=1507.
QC5.Thinking about your non-academic experience, how important do you think the quality of the campus facilities is/will be?

Accommodation is clearly of prime importance with more than half rating it as very important, which rises to 61% among applicants compared to 48% among students. Beyond this, the quality of the Student Union, eating/food venues and outside spaces are also important.

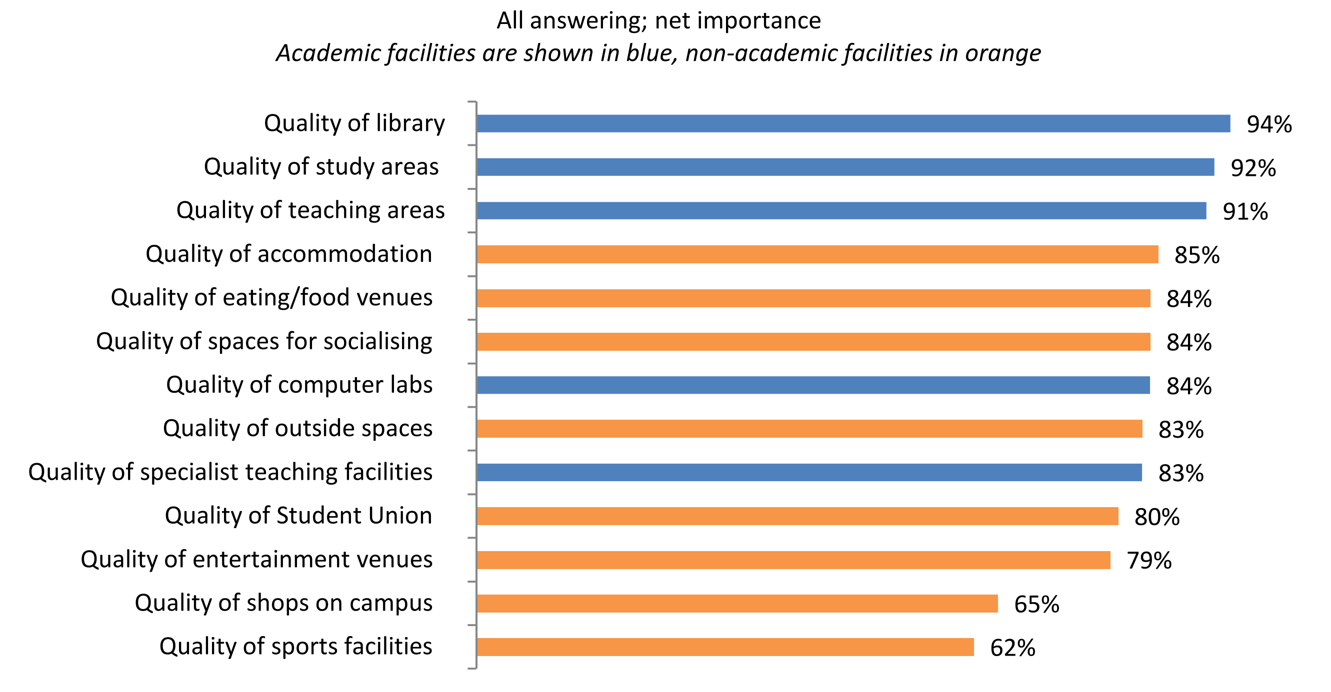
Some gender differences are evident. In terms of net importance (very plus quite important), young women placed more importance on the quality of shops on campus (69% v 60% of men), quality of the Student Union (82% v 77%) and the quality of food/eating venues (86% v 81%).

Those at Russell and 1994 Group universities were even more likely to say accommodation is important (90% and 92% respectively, compared to 85% on average). 1994 Group students were also more likely to say that the "quality of shops on campus" and the "quality of entertainment venues" are important (71% and 82% respectively).

Overseas fee payers also placed greater important on the quality of food and eating venues, the Student Union and the quality of on campus shops than home fee payers. In terms of food and eating venues, and co-incidentally the quality of the Student Union, close to half felt this aspect was very important (46%) compared to less than one third (31%) of home fee payers. 30% felt the quality of shops was very important with just 19% of home fee payers saying this.

It is however interesting to note that 'net' importance ratings are lower across the board for non-academic facilities than for academic ones, as illustrated in figure 15. This reinforces the somewhat lower emphasis on having fun described previously.

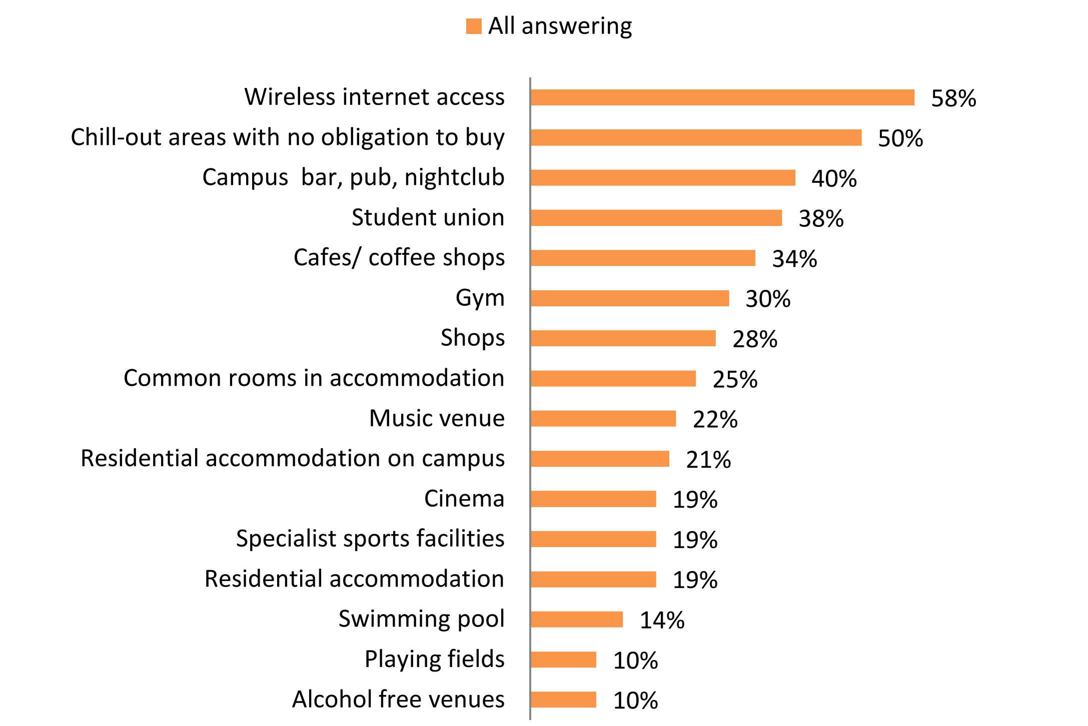
Figure 15: Relative importance of the quality of academic and non-academic campus facilities



Base: All respondents, n=1507.
QC5.Thinking about your non-academic experience, how important do you think the quality of the campus facilities is/will be?
QB5. Thinking about your academic experience, how important do you think the quality of the campus facilities is/will be?

Respondents were also shown a list of different facilities and asked to choose up to five that are important to having a great time at university; these are shown in figure 16.

Figure 16: Facilities important to having a great time at university



Base: All respondents, n=1507.
QC7. Thinking about the kinds of facilities available at university, which are most important to having a great time at university? Please tick UP TO FIVE things that you consider most important.

Wireless internet access being seen as the facility most important to having a great time suggests that students and applicants rely fairly heavily on their mobile devices. Applicants were more likely to feel that wireless internet access was important (62% v 55%), as were female respondents (again 62% v 55% of male respondents).

Unsurprisingly we see more evidence of the cost consciousness here, with the second most popular facility being places to chill out without the obligation to spend money. The most cost conscious seem to be women and students at Million+ universities: 54% of female respondents felt this aspect was important compared to 45% of male students, and 58% of Million+ students chose this compared to 50% of all students.

Appearing third on the list was the campus bar, pub or nightclub. For two fifths overall this was important, but fewer overseas paying students deemed it to be important (only 24% compared to 41% of home payers).

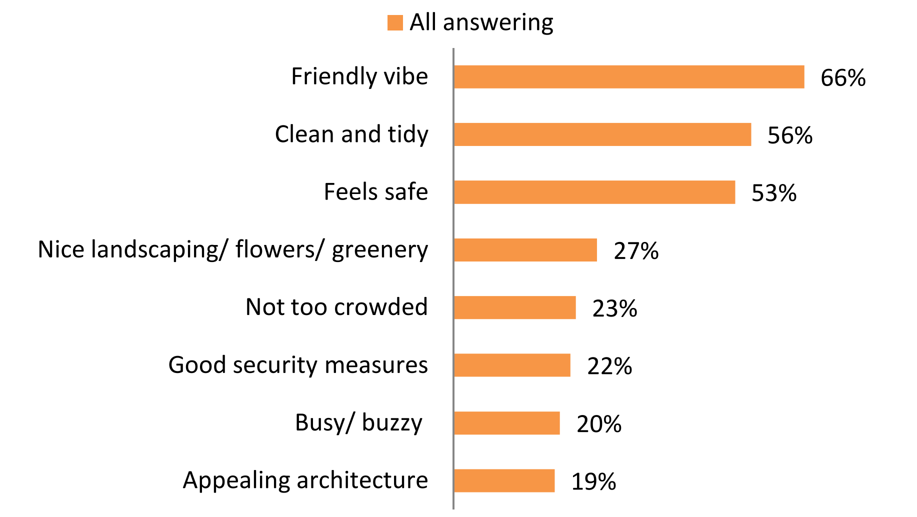
Students at 1994 Group universities are seemingly more social, with high numbers saying that the campus, bar or nightclub (56% compared to 41% overall) is a key ingredient to having a good time. They also felt this way about the student union (47% v 38%).

It is also interesting to note which facilities students and applicant *don't* necessarily feel contribute to a having great time, with alcohol free venues, playing fields and a swimming pool being bottom of the list. That said there was more interest in alcohol free venues among overseas fee payers (15% compared to 9% of home payers). Male respondents placed more emphasis on playing fields than did female ones (15% v 6%) and on specialist sports facilities (25v 14%).

Campus atmosphere

We also asked students and applicants which three things are most important to them in terms of the campus atmosphere.

Figure 17: Elements of a good campus atmosphere



Base: All respondents, n =1507.
QC8. Thinking about the campus atmosphere, what is most important to you? Please tick UP TO THREE things that you consider most important.

By far the most important elements in a good campus atmosphere are a friendly vibe (66%), the campus being clean and tidy (56%) and feeling safe on campus (53%).

Applicants were especially concerned with having a friendly vibe (72% v 60% of students), while female respondents placed more emphasis on feeling safe (60% compared to 44% of men) and having good security measures (24% v 19%).

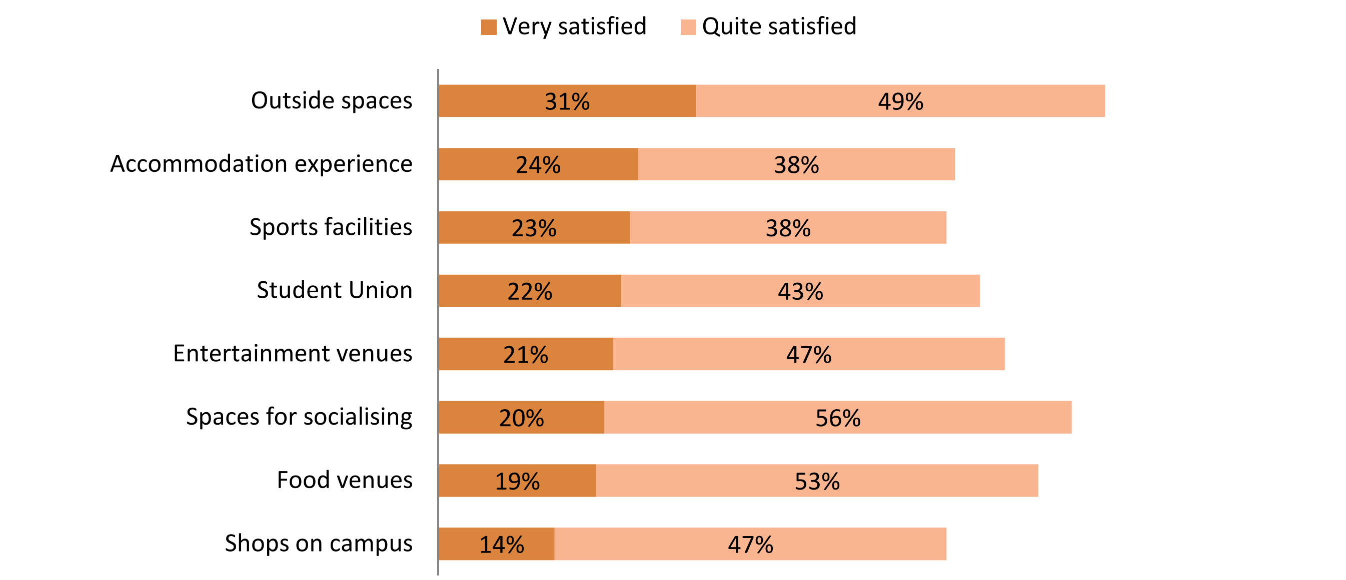
> "I get stressed out with university work so it's nice to be in a calm environment" *(Alexandra, applicant)*

> "I guess a campus should feel almost like your own little 'uni world' where you know that it's mostly just students around" *(Will, student)*

Satisfaction with campus facilities

Broadly speaking, satisfaction is lower than the importance attached to these facilities would warrant.

Figure 18: Satisfaction with campus facilities



Base: All students, n=756.
QC6.How satisfied are you with your campus facilities?

Satisfaction is high with outdoor spaces at as well as spaces for socialising. However, around a quarter of all students are dissatisfied with shops on campus, the Student Union and food venues.

In terms of net scores for dissatisfaction ("not very satisfied" plus "not at all satisfied"), shops on campus, the Student Union and dining and food venues fared worst, with roughly one quarter of students dissatisfied with each of these.

While 29% said they were dissatisfied with shops on campus, some comfort can perhaps be taken from the fact it is not top of the list either in terms of importance or being the kind of facility which contributes to having a great time. There were no differences by gender, but students at Million+ universities were more unhappy with this than average (38% v 29%) while those at 1994 Group institutions report above average satisfaction (73% v 60% on average).

Decent food and eating venues are high the list in terms of importance, so it is perhaps more alarming to find that 23% of students are dissatisfied with these. Overseas students clearly felt they're being less well catered for, with 36% dissatisfied compared to 21% of home fee payers. Again Million+ students reported high levels of dissatisfaction at 30% (v 23% on average), while those at Russell Group universities are most satisfied (79% v 72% on average).

The Student Union was placed 2nd in the list in terms of being 'very important' and 4th in the list in terms of contributing to having a great time at university. Having one quarter of students not happy with such a key part of university life would suggest that something needs to change. Interestingly, male students were less satisfied in this respect than female ones (29% v 21%). Students at 1994 Group universities were by far the most satisfied with their Student Unions (82% v 65% on average).

Accommodation is the non-academic facility identified as being of prime importance, and reassuringly, it fared reasonably well in terms of satisfaction, with three fifths of students (62%) saying they're either very or quite satisfied. However, a significant minority were not happy (16%). It is interesting to note that male students are significantly more satisfied with their accommodation experience (67% v 58% of female students). In terms of institution type, students at Russell and 1994 Group universities are far more satisfied than others (77% and 84% respectively, v 62% overall).

Accommodation preferences and arrangements

We asked young people what kind of accommodation they'd prefer during their first year at university, and the clear winner is university halls of residence. Applicants are even more likely to state this preference than students (71% v 62%).

"Internet connection included in your rent" *(Oli, applicant)*

"Clean, things not breaking all the time" *(Benitia, student)*

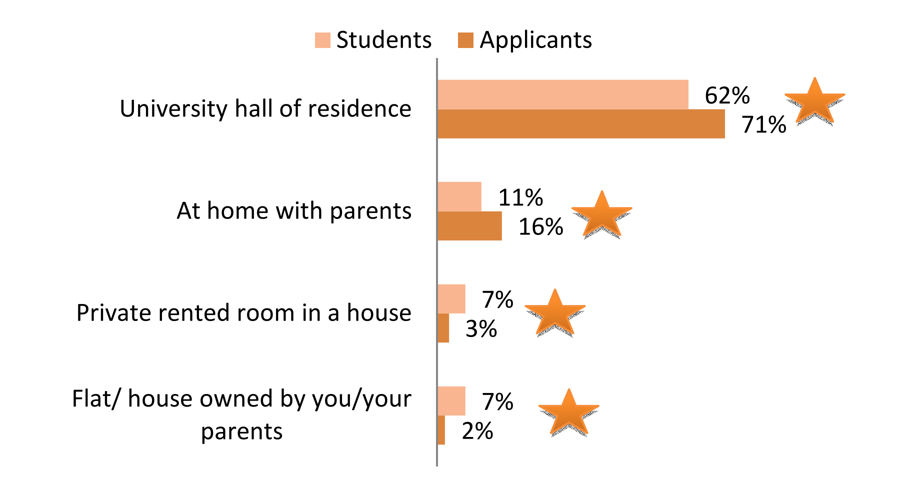
"Social comes above living however, good living experience would put you in a better mood to socialise so they kind of work together" *(Oli, applicant)*

"As long as it's secure and clean with enough space, i don't mind if it's a bit on the weathered side cos i guess that's part of the uni experience" *(Harriet, applicant)*

"Affordable, not too cramped, some king of communal/shared room for being together" *(Imogen, applicant)*

"[Customisation is] important to make it feel like home" *(Oli, applicant)*

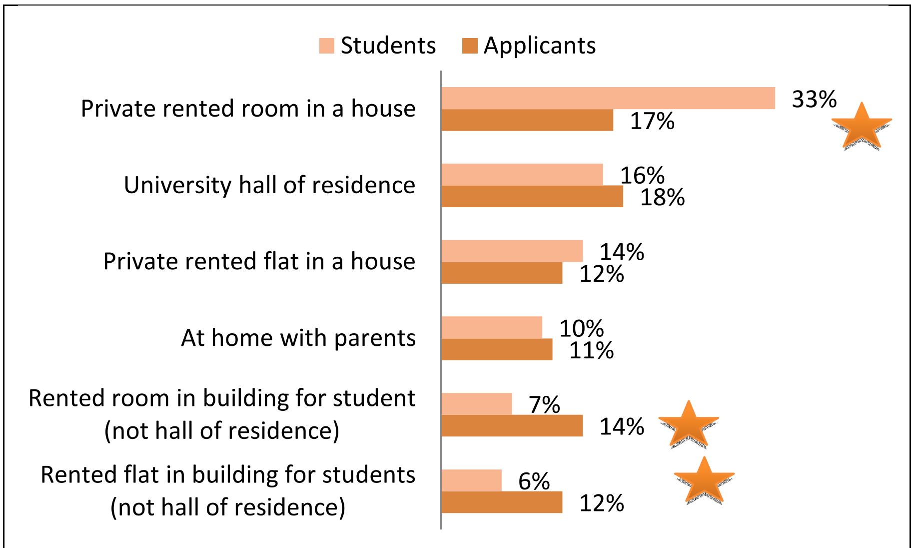
Figure 19: Preferences for first year accommodation



Base: All respondents; applicants n=751, students n=756.
QD2.Which of these best describes where you'd like to live/would have liked to live during term time in your FIRST YEAR of university?

Students at Russell and 1994 Group universities had a stronger preference for university halls of residence (84% and 82% respectively) to those at Million + and Alliance institutions (39% and 51%), more of whom say they prefer to live at home with their parents (21% and 15% respectively). Overseas students' preferences for first year accommodation were broadly in line with the student population as a whole.

Figure 20: Preferences for post-first year accommodation



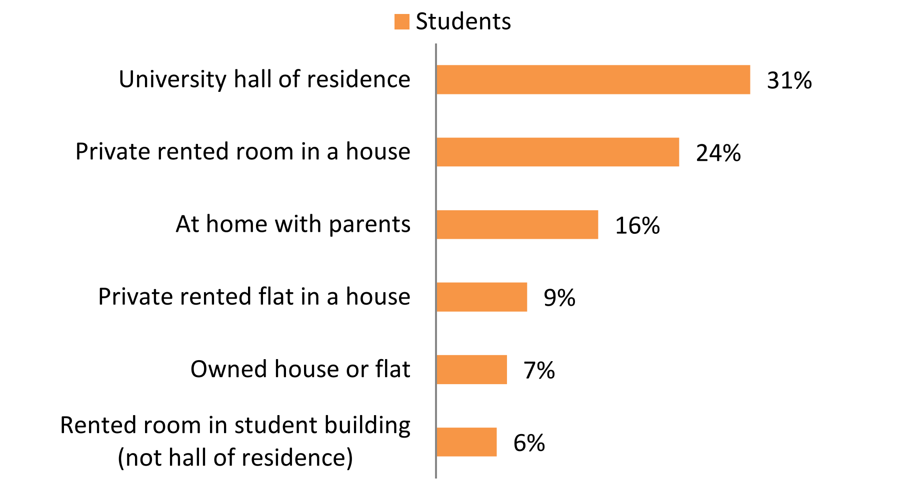
Base: All respondents; applicants n=751, students n=756.
QD3.Which of these best describes where you'd like to live/would have liked to live during term time in your after FIRST YEAR of university?

After their first year both students and applicants alike demonstrate a desire for much more independence in their living choices, with students even more keen to cut the ties to university than applicants.

Overseas students were significantly more likely than home fee payers to say they would like to live in university hall of residence (25% v 16%).

The reality of where students are currently living is most closely aligned to where they say they would like to be after first year. Almost a third live in a university hall of residence, and one quarter in a privately rented room in a house.

Figure 21: Current accommodation arrangements (students)



Base: All students, n=756.
QD1.Which of these best describes where you live during term time?

Conclusions

In terms of campus style and location preferences, there is a preference for campus-style universities. Respondents are equally divided on whether it's better to study in or at an out of town location.

While the quality of the academic facilities aren't top of mind for most when they're asked what constitutes a good academic experience, facilities undoubtedly do have a role to play. Libraries in particular are critical, and there's room for improvement in terms of size and staffing levels. Study areas are also important.

Students and applicants emphasise less the importance of the non-academic facilities compared to the academic facilities which is again indicative of the more serious intent of students to achieve their learning goals, possibly at the expense of some of social parts of university life.

That said, the core non-academic facilities are accommodation, the Student Union and food and eating places. Food venues need to cater better for overseas students. The Student Union is not currently meeting the demands of one quarter of students strongly suggesting that this needs an overhaul.

Other critical ingredients to students' enjoyment of university are wireless internet access, chill out areas with no obligation to buy and the campus bar and nightclub. Not surprisingly given the financial academic outlay that students find themselves restricted financially in non-academic pursuits. We saw too in the focus groups affordability being key for accommodation.

Young women have somewhat different expectations than young men regarding the quality of shops on campus, quality of libraries and study areas, as well as safety and security of accommodation.

For first year applicants and students are keen to live for their first year of university life in halls of residence. Those who don't will typically live at home. After that time, students and applicants are much more open to the range of options on offer. We believe that the key pull here will be affordability.

Appendix 1: Methodology

YouthSight conducted a full service research project on behalf of UPP. This project used a mixed methods methodology incorporating both qualitative and quantitative elements, divided into two separate phases:

- **Phase one** consisted of two 90-minute online focus groups with university applicants due to start in academic year 2012/13 and current university students. Participants had either applied to, or currently attended, a university served by UPP. The focus of this phase was to explore in depth the student experience in terms of the academic aspect and more importantly, from a social and facilities point of view. Crucially for UPP, the non-academic aspect of the student experience discussion gathered views and requirements in regard to accommodation.

  Deliverables: Transcripts from both focus groups and a full report based on the focus group findings.

- **Phase two** aimed to quantify applicant and students' expectations of university, and students' current satisfaction with their experience at university. An online survey of a total of 1,507 applicants and students took part.

  Deliverables: Customised tables, an Excel file of the verbatim from any open questions and "Other" answer categories. A full report based on the findings was also delivered.

Sample size and composition

Phase one: All participants were recruited from YouthSight's OpinionPanel Community. In total, 17 respondents took part in the two focus groups:

- Group 1: Students (9 respondents)
- Group 2: Applicants (8 respondents)

Participants in both groups were either currently studying at, or had applied to, one of the twelve universities served by UPP. These include:

- Exeter, The University of
- Imperial College of Science, Technology and Medicine
- Kent, The University of
- Lancaster, The University of
- Leeds Metropolitan University
- Loughborough University
- Nottingham, The University of
- Nottingham Trent University
- Oxford Brookes University
- Plymouth, The University of
- Reading, The University of
- York, The University of

Quotas were set to achieve sample from only the 12 specified universities and to achieve a roughly equal gender mix in both groups.

Any questions…

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Phase two: A total of 1,511 respondents participated in the survey. However, four respondents were removed from the dataset as part of our quality assurance process, resulting in a dataset based on 1,507 respondents. Of these 1,507 respondents, 751 were applicants and 756 were students. Applicants were recruited from YouthSight's Applicant Panel, while students were recruited from our Student Panel.

Quotas were set to achieve 750 completed interviews with applicants and 750 interviews with students.

Incentives

Phase one: Participants were incentivised with £20 in Amazon or Bonusbond vouchers for participating in the group. Bonusbond vouchers can be spent like cash at a wide range of high street shops.

Phase two: Participants were incentivised with £1 in Amazon or Bonusbond vouchers for completing the survey.

Questionnaire/discussion guide

Phase one: The discussion guide was designed by YouthSight in conjunction with UPP and ARP Consulting.

Phase two: Insights from phase one of the project were incorporated into this questionnaire which was designed and developed by YouthSight in conjunction with UPP and ARP Consulting.

Fieldwork timing

Phase one: The student focus group was held on March 13th 2012. The applicant focus group was held on March 14th 2012.

Phase two: Fieldwork ran from 16th to 27th April 2012.

Data processing

Data processing is carried out in-house by our team of DP and IT professionals. Data is checked for consistency using automated logic checks during collection on the web. At the analysis stage, the data is again checked using both industry-standard automated methods and by employing manual, visual and sense checks. Client deliverables are thoroughly compared to raw data toplines to ensure they reflect the collected data.

Data analysis

Phase one: Transcripts from the online groups were analysed using a classic content analysis approach. Verbatim quotes from the groups are included in the report to bring the research to life and illustrate the way young people talk about the issues involved. Counts were also used to understand to how frequently issues were mentioned.

Phase two: YouthSight processed the data to produce a set of data tables with analysis breaks by:

- Academic status (applicant, student)
- Gender (male, female)
- Fee status (pay home fees, pay overseas fees)
- University campus preference (campus, not a campus, either/don't know)
- Region (Northern England, Midlands, South East, Scotland, Northern Ireland, Wales)
- Current accommodation (only asked of students) (student-specific, not student specific)

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Report for UPP:

Student & applicant views on accommodation

Prepared by: Mia Lorenz & Louise Stacey

Date: 13.07.2012

Contents

Background & introduction

Background

UPP provide student accommodation, and increasingly, facilities management to higher education institutions in the UK. This primarily takes the form of very long term contracts with institutions. Because UPP's success is aligned with that of its clients; namely continuing to be successful at attracting and retaining students, UPP has long had a keen interest in the concept of the student experience. UPP has surveyed its student audience for more than a decade to find out how satisfied students are with its products and services, and has also developed a student experience policy.

UPP now wishes to deepen its understanding of the student experience, and to understand how changes in the higher education (HE) fees landscape affect student expectations of and satisfaction with their experience at university. It therefore commissioned research into these matters, to be conducted on an annual basis.

The findings from this research will flow directly into UPP's student experience policy, keeping it at the forefront of what students want, and will influence strategic decisions on new product development in response to changes in student expectations.

Research objectives

The study in its entirety was commissioned to explore in depth the student experience, both in terms of the academic aspects but just as importantly, the social aspects, and in particular, views and requirements in terms of accommodation.

Specific objectives were to explore and understand:

- Why young people go to university
- What they most look forward to
- How they define the 'student experience'
- Their expectations in terms of the academic part of the student experience
- Their expectations in terms of the non-academic part of the student experience (the 'living' or social side)
- Their expectations of their accommodation and other facilities.

Brief overview of methodology

The first phase of this project was a qualitative study that involved two online focus groups, one with applicants and one with students. The second phase quantified findings emerging from the first phase. A full description of the methodology can be found in Appendix 1.

About this report

This report details the findings from survey questions and focus group discussions on accommodation preferences and reactions to a set of accommodation concepts devised by UPP. It accompanies a separate report that covers students' expectations and experiences of higher education, which is publicly available.

Significant differences in tables and charts

In this report, statistically significant differences in data shown in tables are indicated by the colour of the table cell. A blue background indicates that the figure in that cell is significantly higher than any figure in the same row.

Where data is shown in charts, significant differences are highlighted by orange stars.

Executive summary

Introduction

The broad aim of this report is to present detailed findings on students' preferences, needs, experiences and satisfaction.

University halls of residence are popular, but affordability increasingly exerts a pull

University applicants and first-year students are generally keen to experience university life in halls of residence or other student-specific accommodation. It's likely that this option is so popular because it furthers some of the primary non-academic expectations that young people have of the university experience: making new friends, broadening their horizons and gaining independence and maturity. Students at Russell and 1994 Group institutions are far more likely to prefer halls accommodation. Those who prefer not to live in halls typically choose to live at home. Million+ and Alliance students are most likely to choose this option.

It is possible that this is reflection of the socio-economic composition of the universities forming each Mission Group and their very different national and regional roles. However, from the perspective of UPP it does suggest a more nuanced approach be sought - with the analysis of the composition of each new partner institution feeding into the product offer and its development.

The research also suggests that after the first year, young people are much more open to the range of accommodation options on offer. We believe that a key pull here will be affordability, both in terms of experiencing housing in the private rented sector, and also because the research suggests that more students are living at home than their stated preferences indicate would be the case.

For UPP a core element of its business model is that the accommodation it develops is aimed primarily at first year students - in the majority undergraduates, but also taught postgraduates. However, where cost pressures on students are increasing many universities will need to market more to returners, unable to assume that new student demand will be sufficient to secure 100% occupancy. The research suggests that UPP needs to be engaging ever more with its partners to open up this market.

Affordability is the most important aspect of accommodation

Given the significant personal financial commitments that young people are making to pay for university, they're extremely cost conscious and increasingly looking for ways to make savings. Unsurprisingly therefore when asked what their priorities were from accommodation the top answer was affordable rent, followed by clean, generous and well maintained spaces.

Within bedrooms the key priorities are for wireless internet connection, as well as enough space in the room, enough desk space and storage space.

Any questions....

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In kitchen and shared dining areas the aspects of most importance were the level of equipment provided, not sharing with too many people, the provision of enough space for dining and the size of the kitchen.

In terms of satisfaction among current students, satisfaction with cleanliness, staff and décor is high, but rental prices and the size and configuration of shared spaces perform badly.

Security is essential but not always top of mind for young people

Safety and security isn't always at the forefront of young people's minds but we know from other research that it certainly is for their parents. Among young people there's a sense that it is a given, and not something they need to concern themselves with too much. What they most expect to see in terms of security is CCTV, outside doors that lock automatically and smart card entry system. Young women have higher expectations of security and are significantly more likely to want CCTV, external locking doors, 24/7 wardens and panic buttons. Encouragingly there were high levels of satisfaction with the security of university accommodation, and it was similarly high for young women and men.

Generally speaking, when there are issues students and applicants will turn to maintenance staff and wardens/residential advisors.

There's scope for a range of accommodation solutions at different price points, but affordability is increasingly key

We tested four accommodation concepts in this study, initially without prices and then with relative prices revealed. Initially, before prices were revealed, the en-suite cluster flat was the most popular choice, followed by the studio flat.

Once prices were introduced the popularity of the en-suite bedroom declined but only slightly, whereas the drop was more significant for the studio flat. This meant that the en-suite cluster flat remained the most popular arrangement for students. With prices revealed, both the townhouse and economy rooms gained in popularity, primarily at the expense of the studio flat.

These findings suggest that there remains a market for en-suite solutions, but they also indicate that studio accommodation is more of a niche product requiring more demonstrable demand from each institution. Given that students are very cost-conscious, and that many are dissatisfied with the pricing of their current accommodation, the findings also suggest that there's demand for the cheaper options, including standard single rooms (i.e. economy) for the first year at university, with the townhouse concept for more suited to returners.

Conclusions and recommendations

It appears to be the case that accommodation choices are complex and are driven by a range of factors: choices are based in part on what young people are familiar with and what might help to alleviate the concerns or fears they have about going to university, but are also driven by the need for an environment that helps them to achieve their learning goals *and* their social goals (such as making new friends).

There is greater interest in purpose-built student accommodation in the first year and a tendency to favour more independent options in subsequent years. This pattern may be explained by university starters looking for home comforts, for what has worked for siblings in the past, or for a sociable environment. For those with their first year behind them it might be about being less cautious and taking braver steps, but also following in the footsteps of what others have done, i.e. conforming to the norm.

The critical needs in terms of bedrooms in accommodation tend to revolve around having a degree of private space that affords the opportunity for learning. Recreational needs, on the other hand, by and large met through shared spaces in the accommodation, and here the expectation is that these spaces are large and well-equipped enough to facilitate socialising, and this clearly includes WiFi connectivity as a matter of course. Consideration will therefore need to be given to how well existing accommodation configurations work in these respects.

Given that students are highly sensitive to costs, it isn't surprising that an affordable rent is the accommodation attribute that young people were most interested in. It is clear that UPP can continue to win market share with its existing range of products, however, it needs to recognise how changes across the sector are likely to impact on the risk behaviour of students and in turn their expectations. Product design would therefore do well to reflect more sensitively the unique demand characteristic of each institution, with facilities that reflect the student's ability to pay and that encourage both learning and socialising.

1: Accommocation arrangements and preferences

Chapter overview

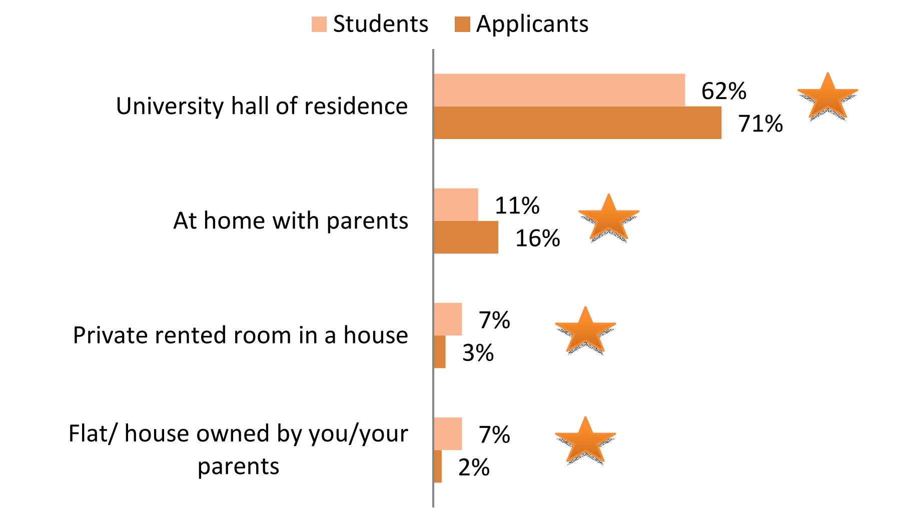
This chapter considers the following:

- Preferences for first year accommodation
- Preferences for accommodation after the first year
- Current accommodation arrangements

Preferences for first year accommodation

We asked young people what kind of accommodation they'd prefer during their first year at university, and the clear winner is university halls of residence. Applicants are even more likely to state this preference than students (71% v 62%).

Figure 1: Preferences for first year accommodation, by study status



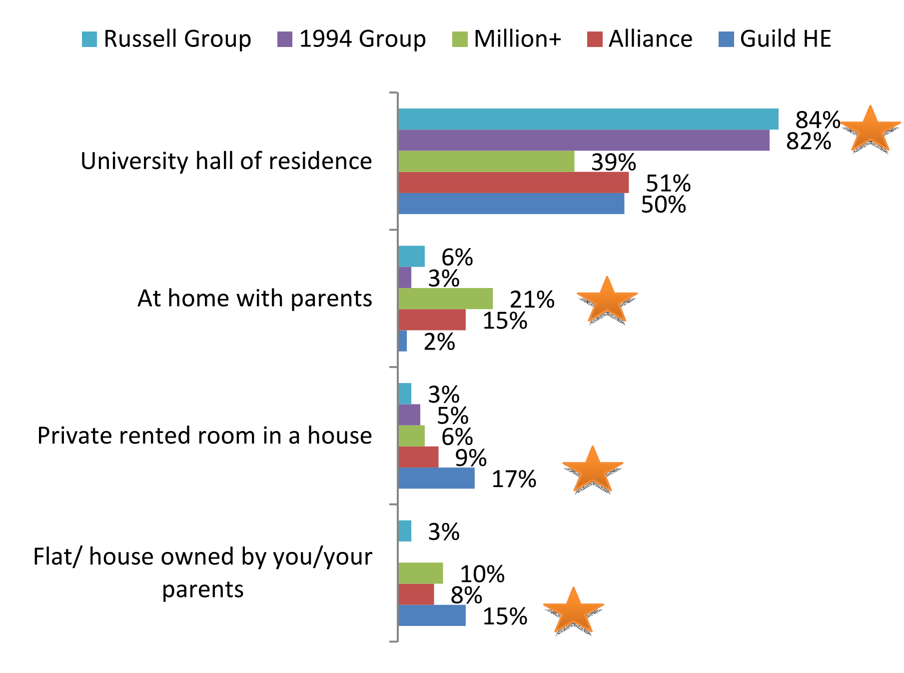
Base: All respondents; applicants n=751, students n=756.

QD2.Which of these best describes where you'd like to live/would have liked to live during term time in your FIRST YEAR of university?

Young women were more likely than young men to say they prefer to live at home with their parents during their first year (15% v 11%). Overseas students' preferences for first year accommodation were broadly in line with the student population as a whole.

As illustrated in figure 2, students at Russell and 1994 Group universities had a far stronger preference for university halls of residence than those at Million+, Guild HE and Alliance institutions. Students at Million+ and Alliance institutions, on the other hand, were significantly more likely to say they prefer living at home with their parents.

Figure 2: Preferences for first year accommodation, by mission group



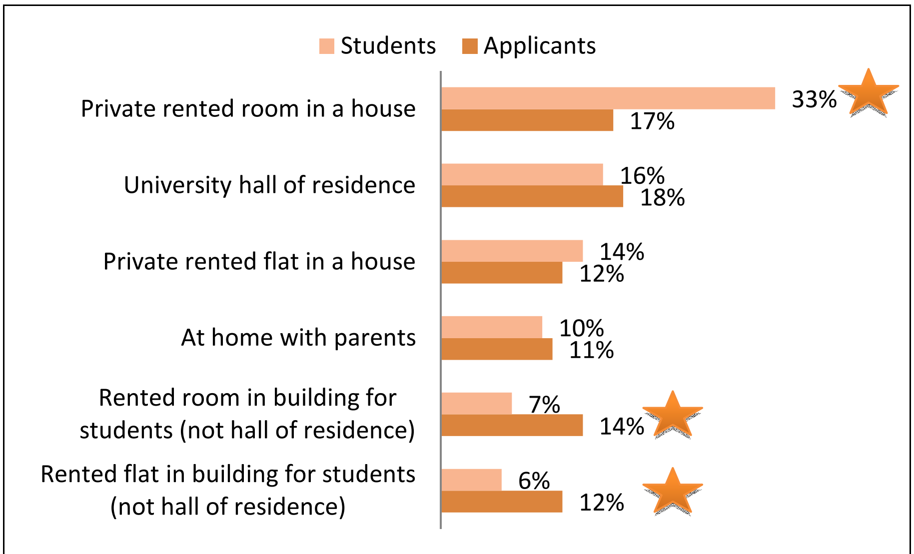
Base: All students, n=756.

QD2.Which of these best describes where you'd like to live/would have liked to live during term time in your FIRST YEAR of university?

Accommodation preferences after first year

Both students and applicants alike demonstrate a desire for much more independence in their living choices after their first year, with students even more keen to live independently of the university than applicants, with private rented accommodation a popular choice.

Figure 3: Preferences for post-first year accommodation

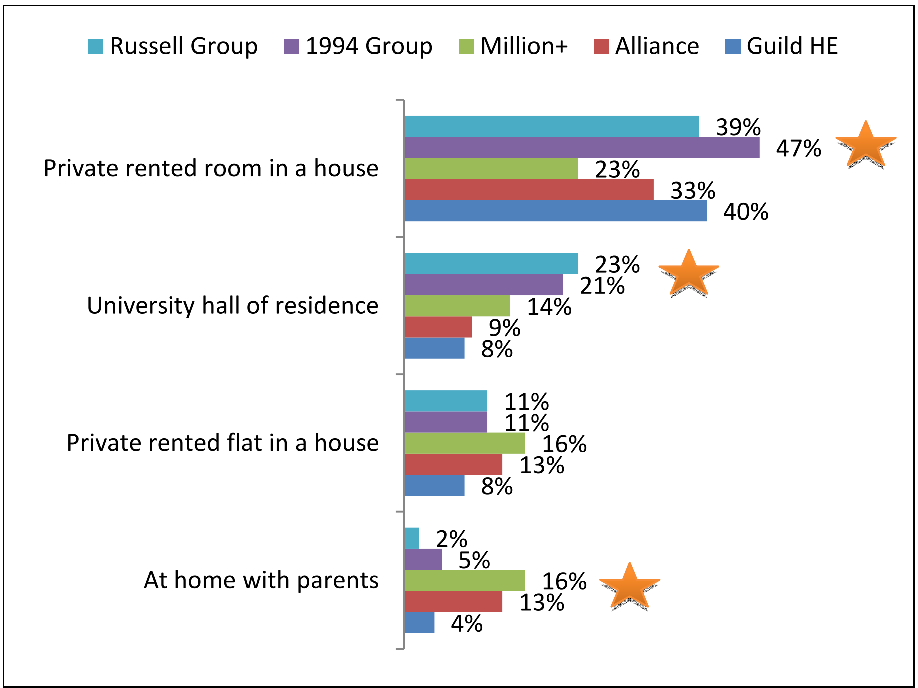


Base: All respondents; applicants n=751, students n=756.

QD3.Which of these best describes where you'd like to live/would have liked to live during term time after your FIRST YEAR at university?

The preference among young women for living at home continued, with 12% preferring this compared with 8% of young men. Overseas students were significantly more likely than home fee payers to say they would like to live in university hall of residence (25% v16%).

Figure 4: Preferences for post-first year accommodation, by mission group



Base: All students, n=756.

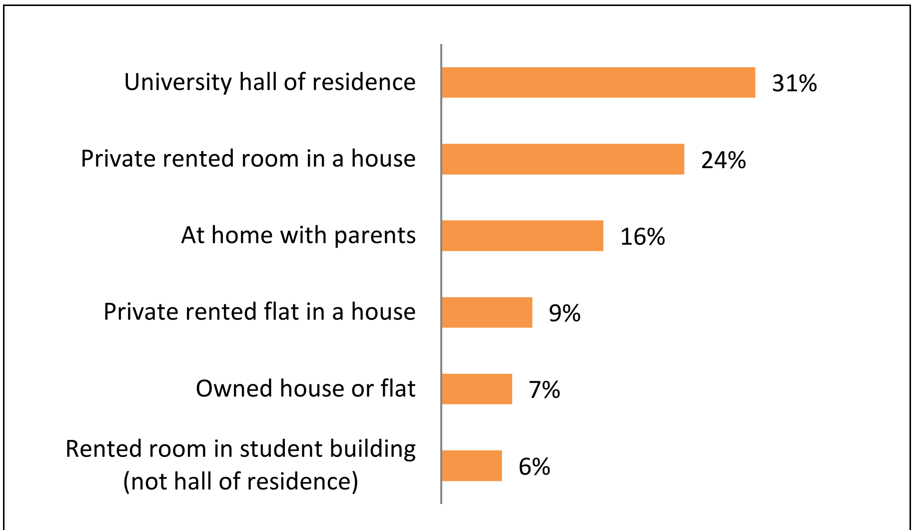
QD2.Which of these best describes where you'd like to live/would have liked to live during term time after your FIRST YEAR of university?

Although the preference for university halls of residence is much lower after the first year, it is Russell and 1994 Group students who remain most interested in this option. Russell Group, 1994 Group and Guild HE students are far more likely to prefer a private rented room. Million+ and Alliance students continue to have the strongest preference for living at home.

Current accommodation arrangements

The reality of where students are currently living is most closely aligned to where they say they would like to be after first year. Almost a third live in a university hall of residence, and one quarter in a privately rented room in a house.

Figure 5: Current accommodation arrangements (students)



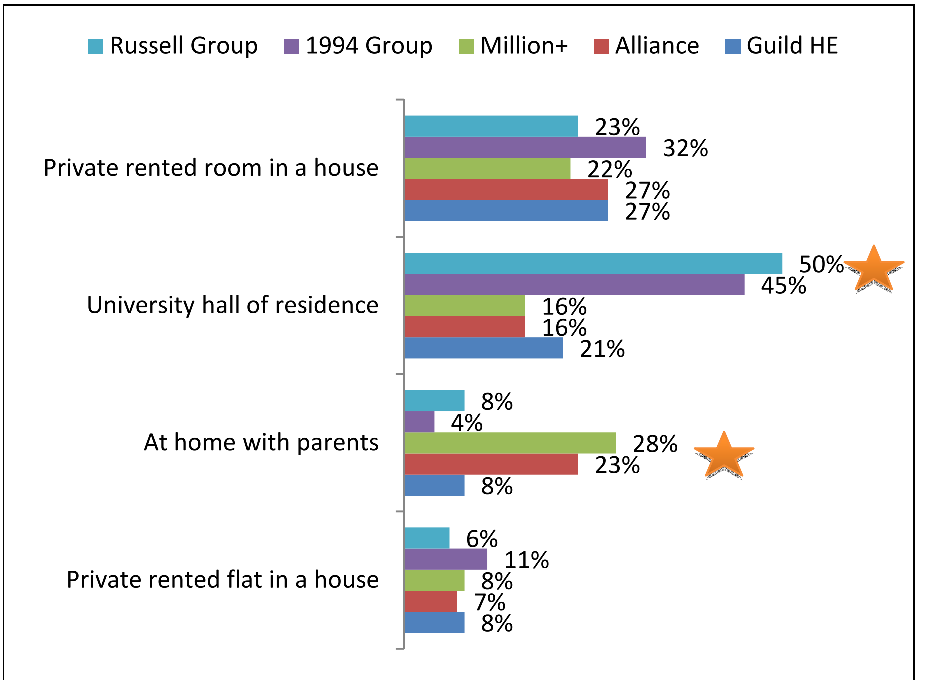
Base: All students, n=756.

QD1.Which of these best describes where you live during term time?

Despite their stated preferences, young men are almost equally likely to live at home with their parents as young women (15% v 17%), but they are in fact twice as likely to live in a private rented flat in a house (12% v 6%). Overseas students' accommodation arrangements are in line with the general student population.

Accommodation preferences among students at different mission group institutions are borne out by their actual living arrangements: around half of all Russell and 1994 Group students live halls of residence, and around a quarter of Million+ and Alliance students live at home with their parents.

Figure 6: Current accommodation arrangements (students), by mission group



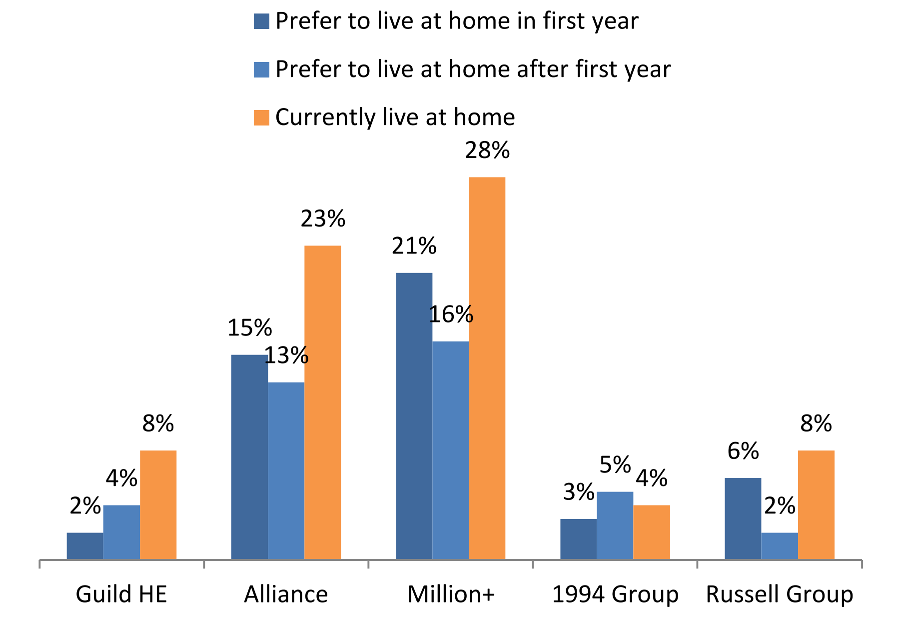
Base: All students, n=756.

QD1.Which of these best describes where you live during term time?

It is interesting to note the discrepancy between stated preference and reality in terms of living at home, especially for Million+ and Alliance students. This is illustrated in figure 7. The implication is living at home is not a 'preferred' choice for some, but rather a necessity arising from financial pressures or family obligations.

For UPP and its partners this suggests that affordability is forcing some students to live at home. It also implies that a proportion of students who live at home would actually prefer to live in university accommodation, but at the right price. For those institutions demonstrating fee price elasticity of demand there is a clear case for sensitive price point analyses - supporting each partner in encouraging its students to study and live at the university rather than at home.

Figure 7: Stated preference for vs. actual rates of living at home, by mission group



Base: All students, n=756.

QD2.Which of these best describes where you'd like to live/would have liked to live during term time in your FIRST YEAR of university?

Conclusions

Young people, and especially those at Russell and 1994 Group institutions, are generally keen to live university life in purpose built accommodation during their first year. Those who don't live in halls typically say they prefer to live at home.

After the first year, young people are much more open to the range of options on offer, though those at Russell and 1994 Group institutions continue to prefer halls and Million+ and Alliance students continue to favour living at home. We believe that the key pull here is affordability. This is borne out by the finding that more students actually live at home than their expressed preference would indicate should be the case, implying that financial and family obligations get in the way of hopes and expectations.

2: Relative importance of accommodation aspects

Chapter overview

This chapter considers the following:

- What's important overall from accommodation
- What's important from bedrooms
- What's important from shared dining facilities/ kitchens
- Satisfaction with accommodation

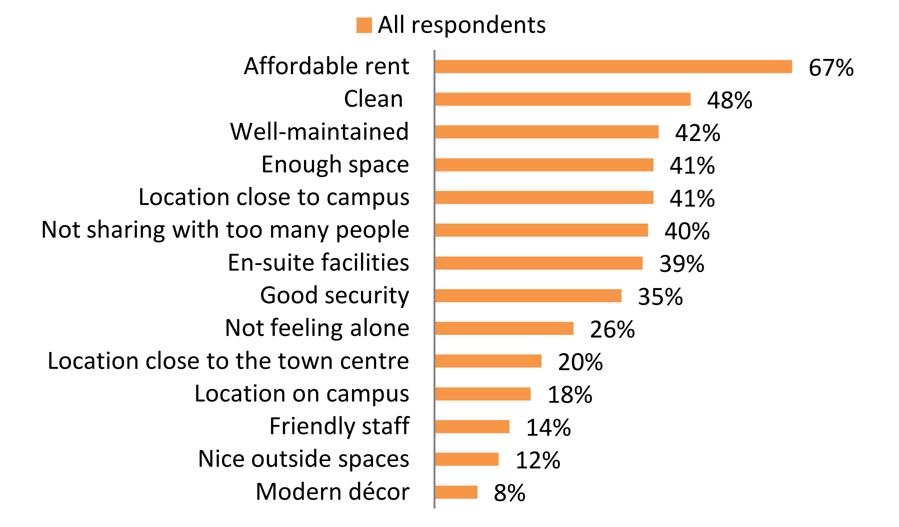
Most important factors overall

Focus group participants spontaneously expressed the view that **good accommodation is the right facilities at the right price**. Other unprompted issues mentioned were good maintenance and hygiene, the ability to control and customise the space within reason, a good level of ambience and adequate décor (preferably modern). In the groups, by far the most discussed aspect was the actual facilities and the equipment provided; especially internet access but also cleanliness and maintenance.

> "Affordable, not too cramped, some kind of communal/shared room for being together"
> *(Imogen, applicant)*
>
> "Cheap, en-suite, clean, nothing should break, if it does should have someone fix it"
> *(Mussa, student)*
>
> "As long as it's secure and clean with enough space, i don't mind if it's a bit on the weathered side cos i guess that's part of the uni experience"
> *(Harriet, applicant)*
>
> Space for social areas should be a priority, as that's where larger spaces are needed"
> *(Luke, student)*

The survey data confirms that **being able to afford the rent** is the aspect of accommodation considered **most important** by applicants and students alike. This is unsurprising given that many have made a significant personal financial commitment to go to university. This concern was also voiced in the focus groups, and extended into affordability in other areas such as social activities, nightlife, food and drink etc.

Figure 8: Most important aspects of student accommodation



Base: All respondents, n =1507.
QD13.Thinking about student accommodation overall, what is most important to you?

The findings from the online survey also support the spontaneously expressed focus group views on cleanliness and maintenance, as these are the second and third most important aspects of accommodation. Also important are the size of accommodation, both in terms of the having a large enough space (41%) and not sharing with too many people (40%). In the focus groups shared space was almost seen as equally if not more important than cost. Participants were keen for spacious accommodation with some outdoor space and a diner or lounge, and for it to be clean, well-equipped and nice to spend time in.

The importance of location is stressed repeatedly, most commonly in terms of close proximity to campus (41%) and proximity to the town centre (20%). A similar proportion (18%) was keen to have accommodation on campus.

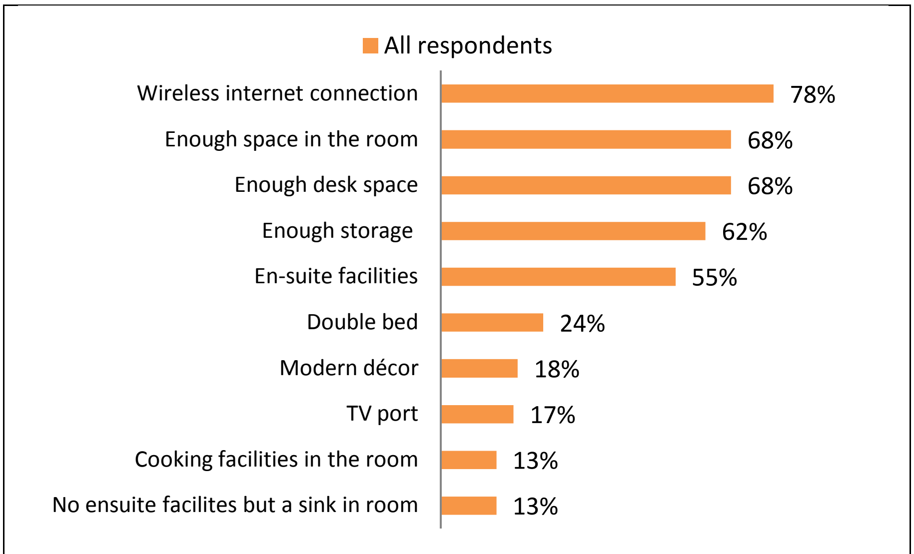
Broadly speaking, applicants and students held similar views on what was important. However, applicants were much more likely to cite en-suite facilities (45% v 34%), friendly staff (17% v 12%) and modern décor (10% v 6%). These differences are quite probably due to students' real-life experience having led to them overcome worries about meeting new people and their ability to get along with them in a shared space.

It is worth highlighting the importance of **security and differences by gender**. Firstly, expectations of security are high but they are not necessarily mentioned spontaneously as we saw in the focus groups. Although it comes 8th on the list in terms of importance, it is nevertheless important to more than one third of students (35%), rising to nearly two fifths of female students (38% of whom consider it important compared to 31% of male students). Other aspects of greater significance to female students include the location being close to campus (43% v 37%) and not feeling alone (38% v 31%). Reassuringly, the accommodation security scores highly in terms of satisfaction, as illustrated in figure 16. Home and overseas fee payers were similar in their views, and on the whole, there were few noteworthy differences by mission group.

Most important requirements from bedrooms

As illustrated in figure 9 below, young people say that wireless connection, enough space in the room and enough desk space are most important.

Figure 9: Most important requirements from bedrooms



Base: All respondents, n =1507.

QD4.Thinking about bedrooms in student accommodation, what is most important to you? Please tick up to five things that you consider most important?

The high level of importance placed on wireless connectivity could simply be a consequence of young people being likely to have wireless devices that enable communication with families and friends. It also echoes findings in the overall Student Experience report that wireless internet access is an important ingredient in having a great time at university. It is perhaps indicative of recent developments in technology that the proportion saying a TV port is among the five most important aspects is quite low at 17% (compared to 78% for wireless access).

I'm praying for en-suite… and want a fair size room, not a little box”
(Tayla, applicant)

“Internet connection included in your rent”
(Oli, applicant)

“Able to do what you want within reason”
(Imogen, applicant)

“[Customisation is] important to make it feel like home”
(Oli, applicant)

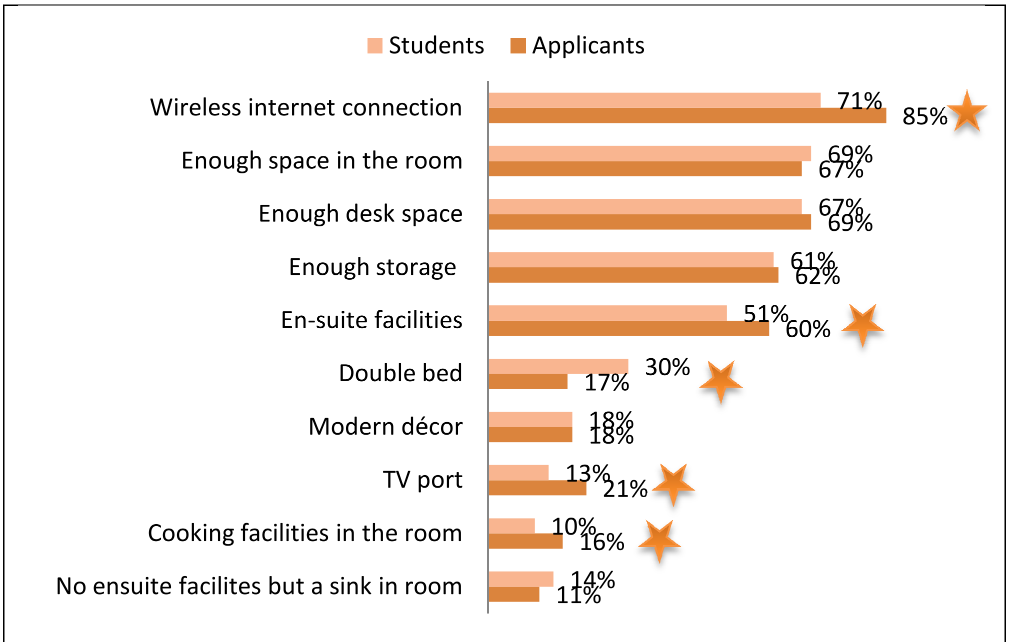
The finding that having sufficient space in the room, enough desk space and enough storage, are the second, third and fourth most important aspects of the bedroom suggests that the spaciousness of accommodation, when these factors are taken together, is actually more important than wireless access.

It's also worth considering that the top three needs are at least partially tied to helping provide a good learning experience. We know from the overall Student Experience report published as part of this research that students are focussed on education being a route to employability. This suggests that the needs of young people with respect to accommodation are aligned to their learning goals. However our focus group work indicates that not all students prefer to study in their bedrooms, with reasons for this ranging from wanting to separate study and social life, and finding it too easy to get distracted on their own.

En-suite facilities are important to over half (55%) of all respondents, more so than merely having sink in a room without en-suite facilities (13%).

There are some differences between student and applicant priorities, as illustrated in figure 10, which are undoubtedly due to students having had the benefit of experience.

Figure 10: Most important requirements from bedrooms, students versus applicants



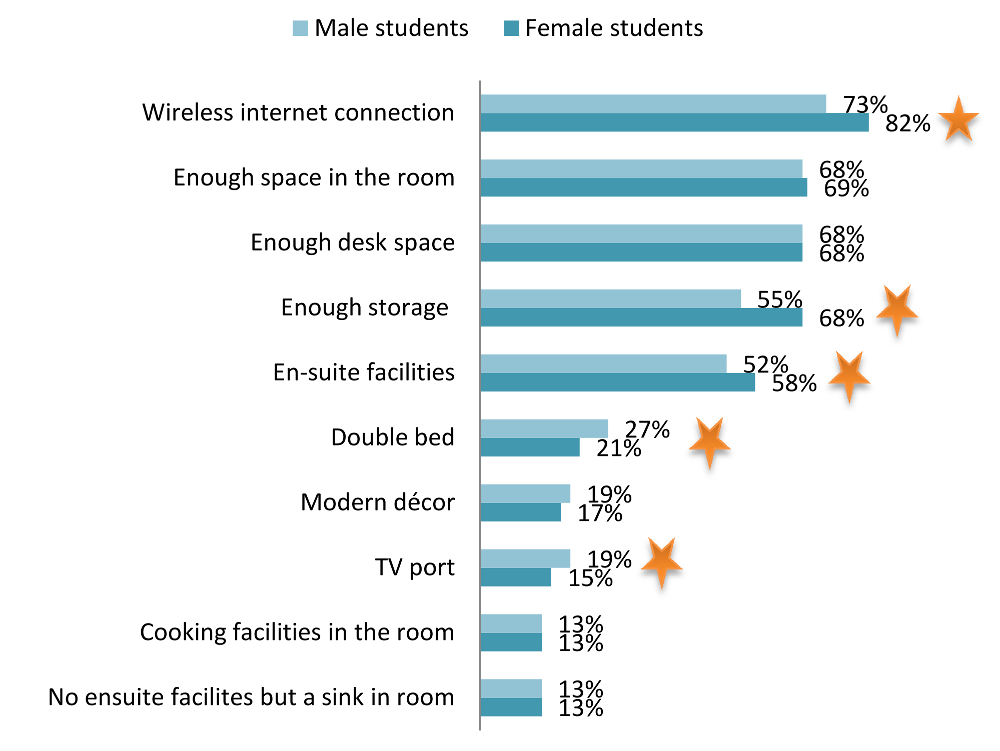
Base: All respondents; applicants, n= 751, students, n=756.

QD4.Thinking about bedrooms in student accommodation, what is most important to you? Please tick up to five things that you consider most important?

Applicants were significantly more likely than students to say wireless internet connection, en-suite facilities, a TV port and cooking facilities in their room are important. These responses might be seen to give us some insight into the insecurity that applicants are perhaps feeling, and a stronger desire than students to have privacy if it all becomes too overwhelming. On the other hand, current students seem to be less phased by the communal nature of student lifestyle – indeed they are almost twice as likely to cite a double bed as important (30% compared to 17% of applicants)!

As illustrated in figure 11 young women placed more importance on wireless connectivity, storage and en-suite facilities than young men. Having a double bed and a TV port was more important to young men.

Figure 11: Most important requirements from bedrooms, by gender

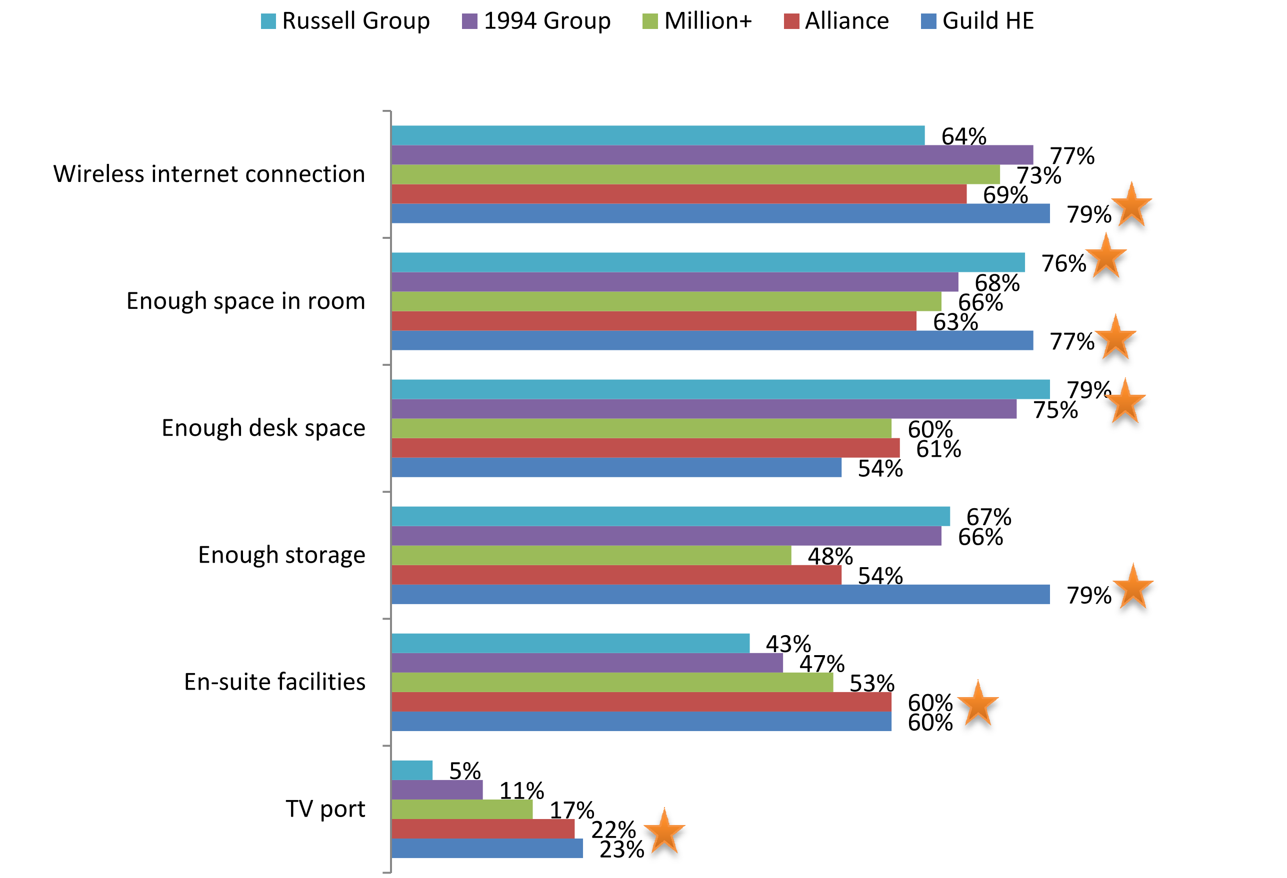


Base: All respondents; male, n= 678, female, n=829.

QD4.Thinking about bedrooms in student accommodation, what is most important to you? Please tick up to five things that you consider most important?

Overseas fee payers were in line with the average in terms of their bedroom requirements. There were, however, significant differences by mission group. Students at Russell Group universities placed much greater emphasis than students from other universities on the provision of space (general space and desk space) in their bedrooms so much so that wireless internet connection was came in 4th for them. Guild HE students were particularly keen on storage space and wireless connectivity (these two items shared the number one slot for them). Students at Guild HE and Alliance universities were also keener on en-suite facilities and TV ports than other students, especially those at Russell Group institutions. 1994 Group students placed greatest importance on wireless connectivity, and were keener on having enough desk space.

Figure 12: Most important requirements from bedrooms, by mission group



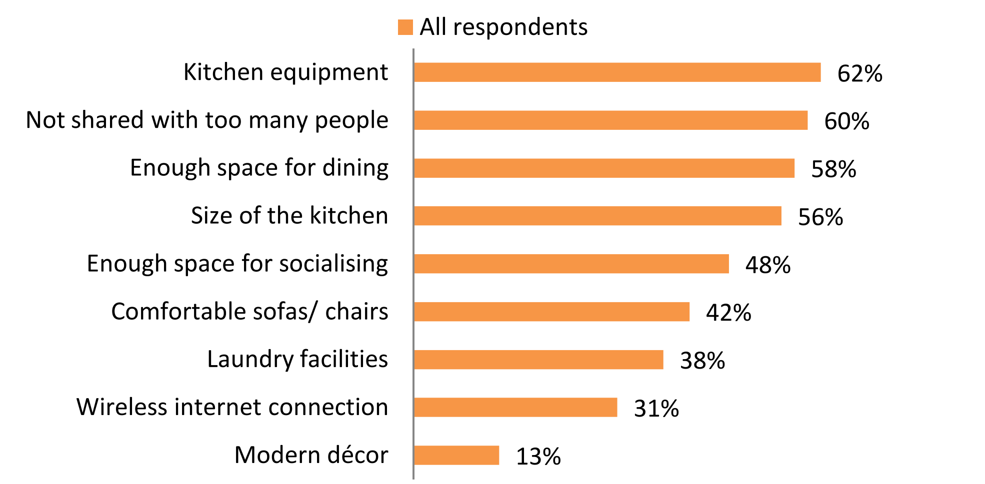
Base: all students, n=756

QD4. Thinking about the BEDROOMS in student accommodation, what is most important to you?

Most important requirements from kitchens

We also asked respondents to select the three things that are most important in a shared kitchen/dining area. In the event, four areas emerged as important: kitchen equipment, not sharing with too many people, enough space for dining and size and configuration of the kitchen.

Figure 13: Most important requirements from kitchens



Base: All respondents, n=1507.

QD5. Thinking about the shared kitchen/dining areas in student accommodation, what is most important to you?

With having enough space to socialise coming in 5th place, it is clear that spaciousness once again is a key issue, and that having enough space clearly trumps many other considerations including comfort and décor.

While the overall pattern of results is similar for applicants and students, applicants were significantly more likely than students to cite kitchen equipment (64% v 59%), wireless connectivity (35% v 28%) and modern décor (15% v 11%).

Young women placed more emphasis than did young men on not sharing with too many people (63% v 55%), having enough dining space (61% v 54%), and laundry facilities (41% v 35%).

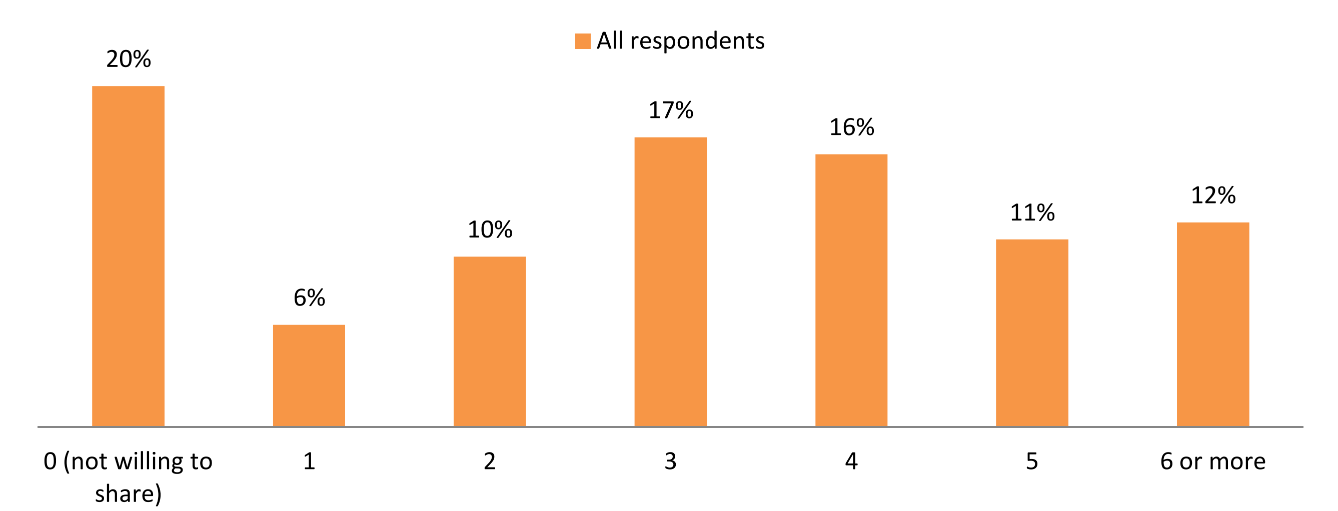
Maximum numbers for sharing a bathroom

In the focus groups, young people told us that they're eager to share (so as to facilitate their social life) but they don't want to share specific facilities with *too many* others. We therefore sought to quantify where those limits are in the survey.

Overall, respondents said they'd be willing to share a bathroom with 3.1 others on average. Young men and students were willing to share with a slightly larger number of people (3.3 in both cases) than were young women and applicants (2.9 in both cases), and those in student-specific accommodation were willing to share with an even higher number (3.8 v 2.9). Overseas and home fee payers held very similar views.

These averages, however, mask the fact that there's a hard core of 20% who are unwilling to share a bathroom with anyone, and that fully 12% are willing to share with 6 or more people. This is illustrated in figure 14. It thus appears that there will always be a market for en-suite facilities, but also that many young people are willing to share with quite a number of others (usually 3 or 4 others, but sometimes more).

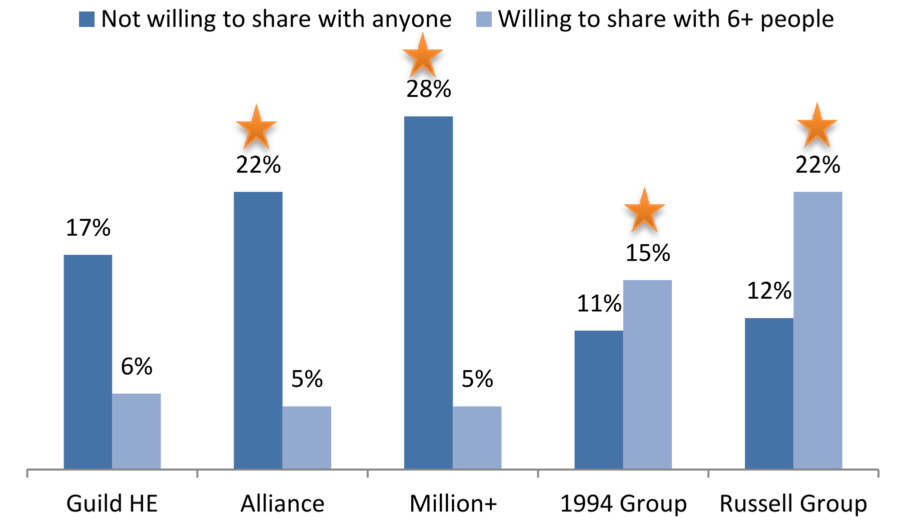
Figure 14: Bathroom sharing preference



Base: All respondents, n=1507.
QD6 What is the maximum number of people you'd be willing to share a bathroom with in student accommodation?

Those in student-specific accommodation are especially likely to say they'll share with a larger number, with 18% saying they're prepared to share with 6 or more people (compared to 7% of those not in student-specific accommodation). It is also interesting to note that students at Alliance and Million+ institutions are far less willing to share with anyone than those at Russell and 1994 Group institutions. For UPP this is an informative finding and might suggest that UPP consider tailoring its product offer accordingly.

Figure 15: Bathroom sharing, by mission group



Base: All students, n=756.
QD6. What is the maximum number of people you'd be willing to share a bathroom with in student accommodation?

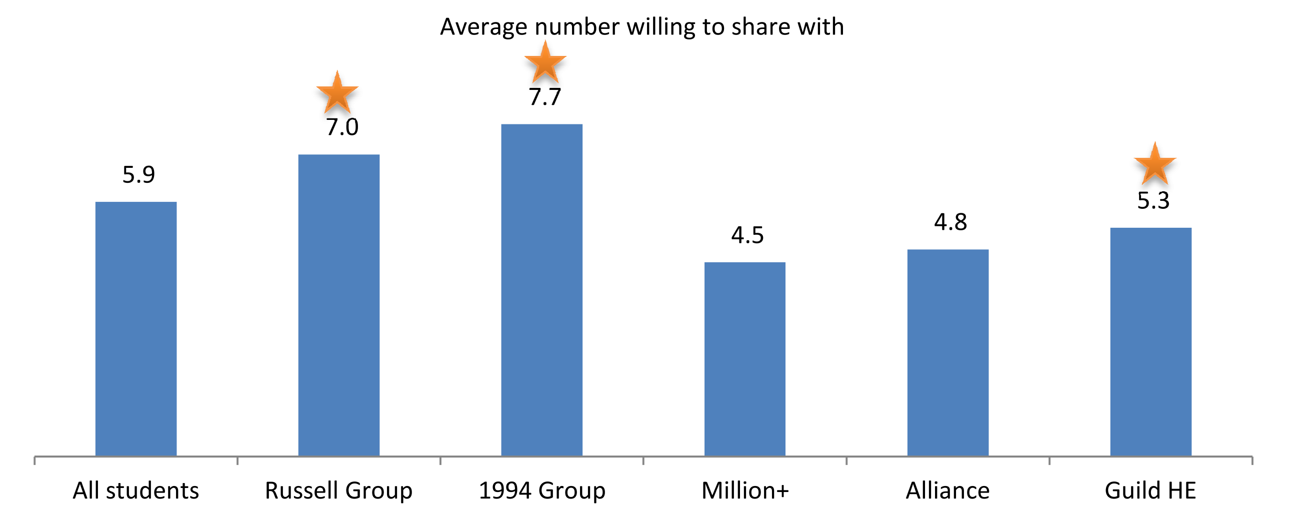
Maximum numbers for sharing a kitchen

As would be expected, respondents are willing to share the kitchen with a larger number of people; 6 on average. It was extremely rare for respondents to say they'd be unwilling to share a kitchen with anyone else, with only 2% saying so.

Young men were again prepared to share with a slightly higher number of people than were young women (6.2 v 5.8), and those in student-specific accommodation tolerated higher numbers than those in other kinds of accommodation (6.9 v 5.1). Overseas fee payers are again in line with the average.

There were again significant differences by mission group, as illustrated in figure 16. Students from 1994 Group and Russell Group institutions are willing to share a kitchen with a much higher number of others than those at Million+ and Alliance institutions.

Figure 16: Kitchen sharing, by mission group



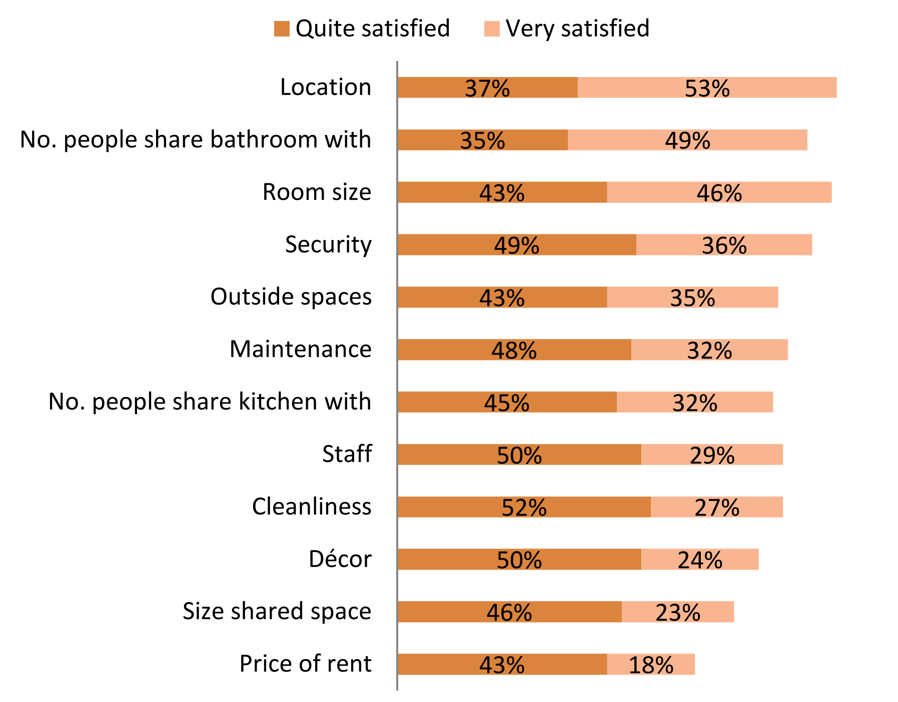
Base: All students, n=756.
QD7. What is the maximum number of people you'd be willing to share a kitchen with in student accommodation?

Satisfaction with accommodation

The overall 'net' satisfaction scores (i.e. very satisfied plus quite satisfied) are encouraging on most measures as the majority saying they're satisfied. There is, however, more variation in satisfaction in terms of the proportion students giving a top box ("very satisfied") rating, as illustrated in figure 17.

On 10 out of the 12 measures roughly three quarters or more were satisfied (on a net basis). What seems to be working really well for students is location (90% satisfied), the size of their room (89%), security (86%) and the number of people they share a bathroom with (84%). Furthermore, an area that is key to get right is cleanliness and this hold the highest top box rating with over half saying they are "very satisfied".

Figure 17: Satisfaction with student-specific accommodation



Base: Students who live in student-specific accommodation (i.e. a university hall of residence, rented room in building for students that isn't a university hall of residence, or rented flat in building for students that isn't a university hall of residence), n=305.
QD14 How satisfied are you with your accommodation?

Satisfaction with the other two measures, price of rent and size of the shared space was much lower (61% and 69% net satisfaction respectively). What is more, as many as **two fifths** (38%) were **dissatisfied with the price of the rent**, and **close to one third** (30%) were **dissatisfied** with the **size of the shared space**. As affordable rent is top of the list in terms of what students want from accommodation this is an area that probably needs to be addressed. Space, and in particular the configuration of communal areas, also is a priority, and the level of dissatisfaction would suggest considerable improvement is needed in this area too.

There were no significant differences by gender, and it is encouraging to see that satisfaction with security is similar for young women, who place greater importance on it than young men.

As these results are based on students who live in student specific accommodation, there are limitations to analysing the data by sub groups and in particular the base sizes are too small to report these results by university type.

Conclusions

The key to successful accommodation is, as our focus groups participants put it, the right accommodation at the right price. Young people are very price sensitive, and overall, the price of accommodation outweighs other factors. Beyond this, hygiene, maintenance and having sufficient, well configured space are also important, as is location, but issues such as staffing and décor are downplayed considerably.

In terms of what students expect from bedrooms in their accommodation, wireless internet access and having enough space, especially to study, top the list. En-suite facilities are also considered important, but on further investigation of sharing, we found that there's really only a hard core of about 1 in 5 young people who really are unwilling to share a bathroom. On average though, young people are willing to share a bathroom with 3 other people and a kitchen with 6 other people.

In terms of communal kitchens/dining areas, the key requirements are adequate equipment, and enough space for cooking, dining and socialising. In terms of current provision, this may suggest a requirement for UPP to look at the design of these areas to include defined kitchen/dining and lounge space. These areas of provision were prioritised by respondents ahead of, for instance, comfort, wireless access and décor.

Students at Russell and 1994 Group universities have slightly different attitudes, which may be partially explained by the fact that more of them live in student-specific accommodation and are used to sharing. They place greater emphasis on having enough space in their bedroom, but are willing to share a bathroom and kitchen with a considerably larger number of other people.

Among those living in purpose built accommodation, overall satisfaction is high on most measures, including location, size of room, security and number of people the bathroom is shared with. Unfortunately satisfaction is low in two of the most important areas: price of rent and amount of shared space. This once again highlights price-sensitivity and the central role that shared spaces play in the socialisation aspect of accommodation.

3: Accommodation support

Chapter overview

This chapter considers the following:

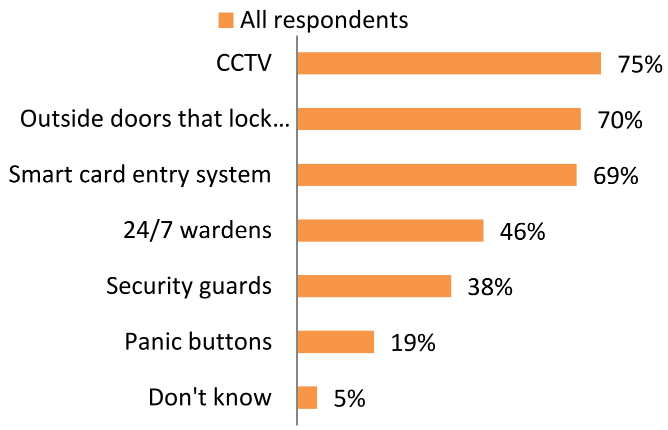
- Expectations from security measures
- Which staff are important in helping when issues arise
- Preferred ways of contacting accommodation staff

Expectations from security measures

We know from other research we have undertaken that students' safety is at the forefront of parents' minds but something that is very much under the radar for students and applicants themselves. There seems to be a sense that good security provision is a given, and not something students need to concern themselves with too much.

As illustrated below, the measures that students were most likely to expect to see in place were CCTV, outside doors that lock automatically and a smart card entry system. They were least likely to expect to see panic buttons.

Figure 18: Expectations about security measures in student accommodation

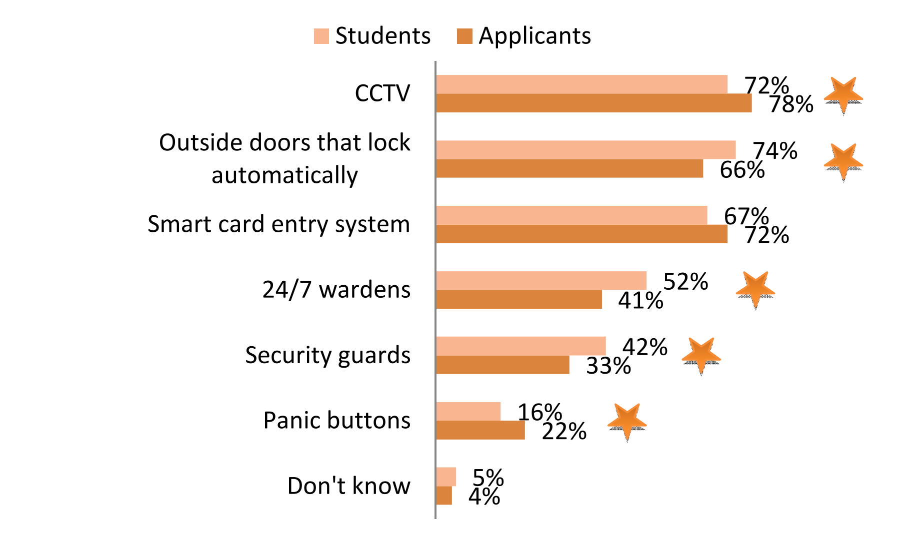


Base: All respondents, n =1507

QD8.Which of the following security measures would you expect in student accommodation, if any?

Generally speaking applicants seem to have higher expectations of security measures than students, which might be attributed to them feeling more anxious as university life is totally new territory. On the other hand, students gave answers based on real-life experience and actual awareness of the security measures they see are in place.

Figure 19: Expectations about security measures, by students vs. applicants



Base: All respondents; applicants, n= 751, students, n=756.

QD8.Which of the following security measures would you expect in student accommodation, if any?

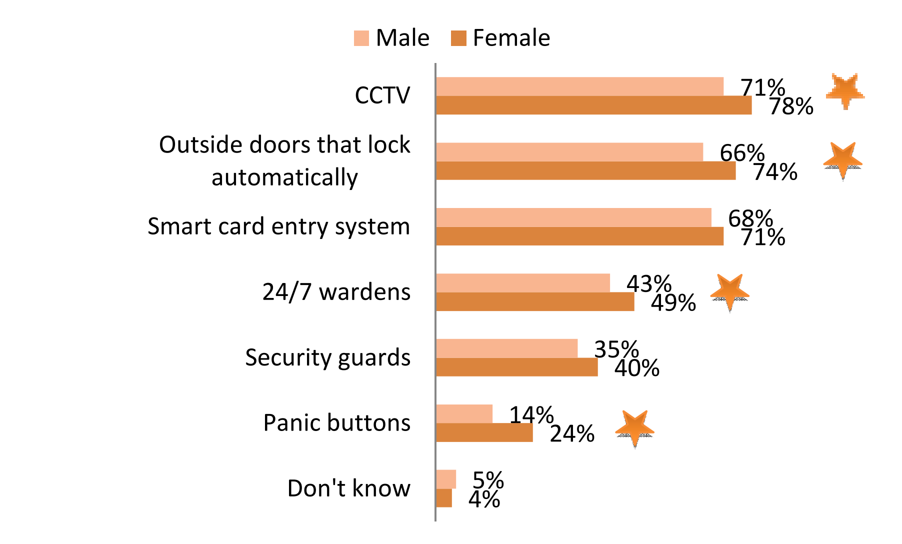
"Listen to issues no matter how small, deal with them quickly and efficiently"
(Imogen, applicant)

"You can always contact them, but you don't see them much, but I think it's better that they're not always in your flats"
(Benitia, student)

"I'd expect them to not be intrusive but to be there if issues did arise"
(Harriet, applicant)

Young women expect to see more security measures than young men, as illustrated in figure 20 below. More young women mentioned CCTV, outside doors that lock automatically, 24/7 wardens and panic buttons.

Figure 20: Expectations about security measures, by gender



Base: All respondents, n =1507, all male respondents, n= 678, all female respondents, n=829

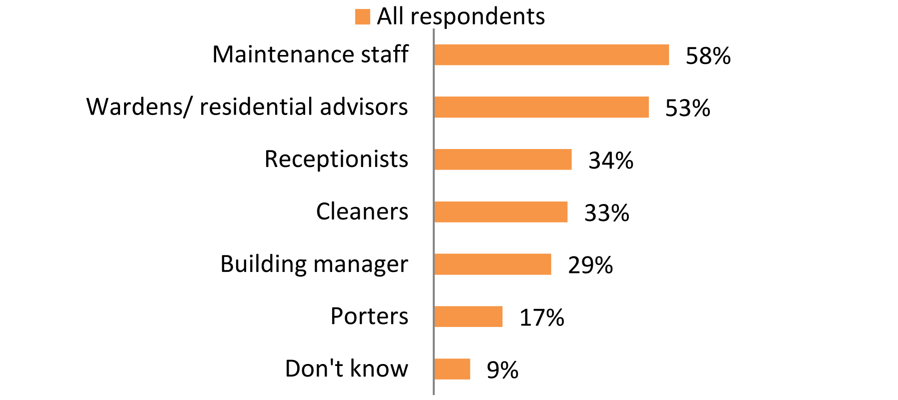
QD8.Which of the following security measures would you expect in student accommodation, if any?

There were higher expectations of security guards being present among overseas students - 50% expected this compared to only 36% of home fee payers.

Staff important in resolving accommodation issues

Respondents saw maintenance staff, followed by wardens and residential advisors, as the key figures to turn to when issues in accommodation arise.

Figure 21: Staff important in resolving accommodation issues

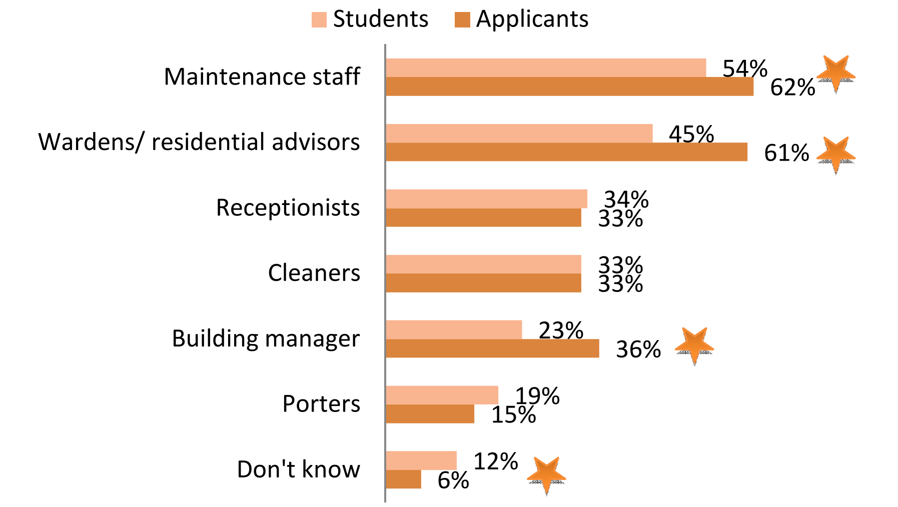


Base: All respondents, n =1507, all applicants, n= 751, all students, n=756

QD9.Who are the important staff in terms of helping you with issues that arise in your accommodation?

Applicants have not experienced university life and to some extent their answers in this area are guesswork. This might explain why applicants are more likely to mention a range of staff than are students. It's worth noting that 12% of students gave the answer "don't know". This could conceivably mean they haven't experienced any problems, and not they that they don't know where to turn to.

Figure 22: Staff important in resolving issues, by students vs. applicants



Base: All respondents, n =150, all applicants, n= 751, all students, n=756

QD9.Who are the important staff in terms of helping you with issues that arise in your accommodation?

The pattern of results by gender and fee paying status is fairly consistent. Students at Russell Group universities were significantly more likely than other students to cite cleaners and porters as most important in helping with accommodation issues.

"Listen to issues no matter how small, deal with them quickly and efficiently"
(Imogen, applicant)

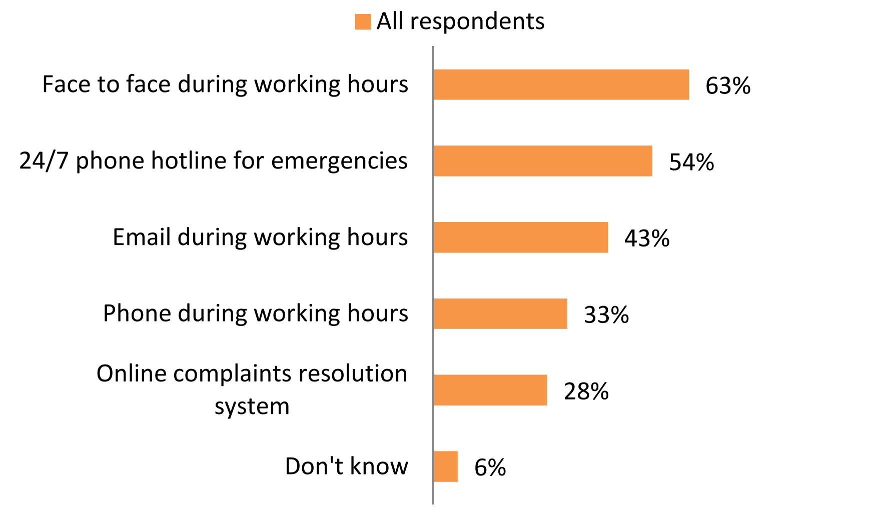
"You can always contact them, but you don't see them much, but I think it's better that they're not always in your flats"
(Benitia, student)

"I'd expect them to not be intrusive but to be there if issues did arise"
(Harriet, applicant)

Preferred ways of contacting accommodation staff

Face to face contact is the preferred method for contact, with a 24/7 phone hotline for emergencies. A 24/7 phone hotline was the second most popular method of contact for over half of respondents, and significantly higher for young women (58% compared to 48% of young men). There were no other significant gender differences.

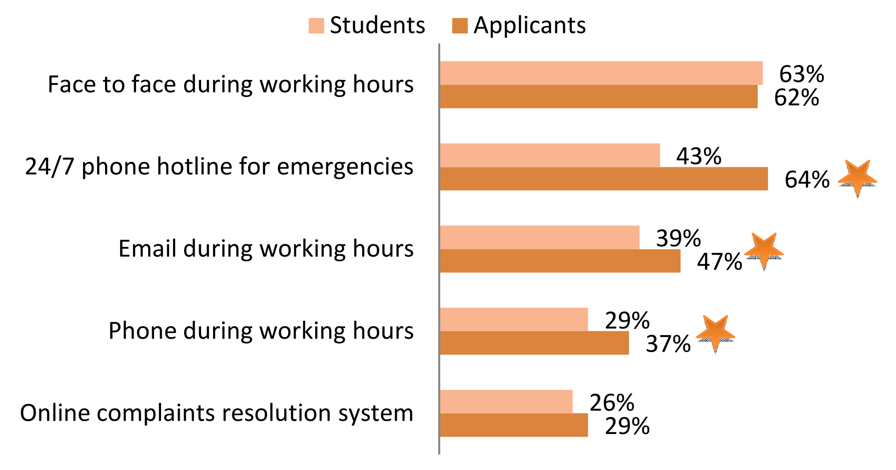
Figure 23: Preferred ways of contacting accommodation staff



Base: All respondents, n =1507.
QD10. What are your preferred ways of contacting accommodation staff?

Here again applicants selected a wider range of contact options than students, which might again be because their answers are based on assumptions, while students' answers are grounded in actual experience.

Figure 24: Preferred ways of contacting staff, by applicants vs. students



Base: All respondents, n =1507, all applicants, n= 751, all students, n=756
QD10.What are your preferred ways of contacting accommodation staff?

Russell Group students were much more likely than the average student to say that they would prefer to contact staff face to face (71% compared to 63%) and also by email during working hours (48% compared to 43%).

Conclusions

A key point to draw from this section is the importance placed on security, and especially the heightened expectations of young women. In terms of security preferences the most important elements of provision were CCTV, outside doors that lock automatically and a smart card entry system. Encouragingly the security measures that are currently in place in university accommodation seem to be effective as there were high levels of satisfaction with this aspect.

Respondents saw maintenance staff, followed by wardens and residential advisors, as the key figures to turn to when issues in accommodation arise. Face to face contact is the preferred method for contact, with a 24/7 phone hotline for emergencies.

4: Accommodation concepts

Chapter overview

This chapter considers the following:

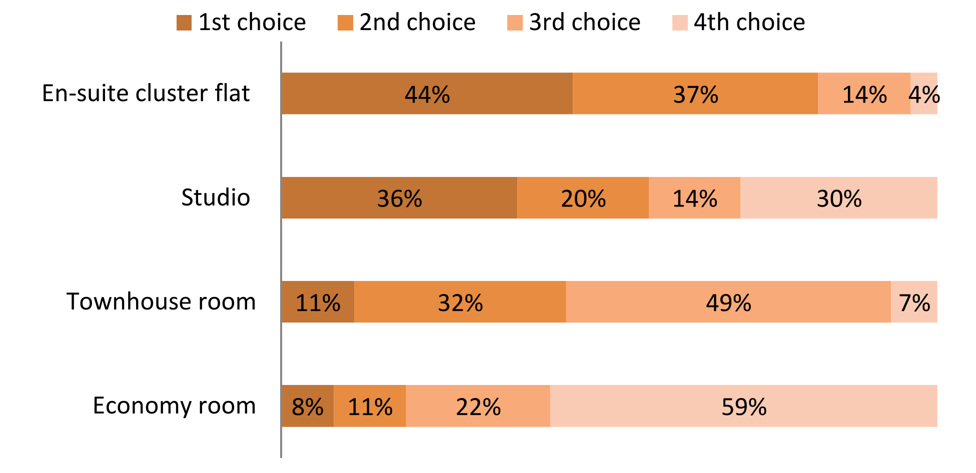
- Level of interest expressed in four accommodation concepts developed by UPP
- Impact of cost on interest in each of the accommodation styles

Accommodation concepts considered

This study explored reactions to four accommodation concepts developed by UPP. Spontaneous likes and dislikes with regard to each of the concepts were explored in detail in the focus groups. This was followed by quantification of the level of interest in each concept, firstly without pricing and then with relative pricing revealed.

As illustrated in figure 25, the **en-suite cluster flat** was the most popular choice with 44% of respondents putting it in first place, and 37% putting it in second place.

Figure 25: Accommodation concept preferences, without pricing



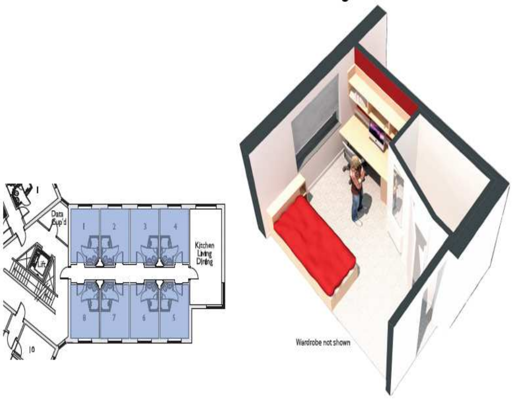
Base: All respondents, n =1507.

QD11.Which of these types of accommodation would you most like to live in?

Young people also reacted positively to this style in the focus groups as they were keen to have social/sharing areas, liked its more luxurious nature, and felt it provided more space than the economy room. However, there were some doubts about the en-suite arrangement being cost effective and a feeling that this would add to the cost.

En-suite cluster flat

Larger single study bedroom with en-suite facilities (shower, hand-basin & toilet). Each cluster flat has 6-8 bedrooms. All the flat-mates share a kitchen with dining area.



Would let me get to know people" *(Stephanie, applicant)*

"I like that you have your own bathroom" *(Callum, student)*

"I don't mind sharing the bathroom, it's just better to have your own" *(Will, student)*

"En-suite costs more" *(Imogen, applicant)*

"From what I've seen/read, sharing with more people tends to be cheaper" *(Harriet, applicant)*

The **studio flat** was the first choice for 36% of respondents and second choice for 20%. In the focus groups, the contemporary and luxurious look and feel appealed initially, but this appeal was almost immediately displaced by concerns about the lack of social areas and the cost implications. Another perceived drawback was that it seemed isolating, playing on fears of being lonely at university.

Studio flat

A large self-contained flat that includes a queen-sized bed, a galley kitchen and en-suite facilities (shower, basin & toilet). The kitchen includes a sink, hotplate, combination microwave, fridge-freezer and storage cupboards, plus dining table and chairs.

"I want this one! You have more freedom…and no worries about facilities being left in a mess…a definite motivation for me to carry on saving [for nice accommodation]!" *(Hannah, applicant)*

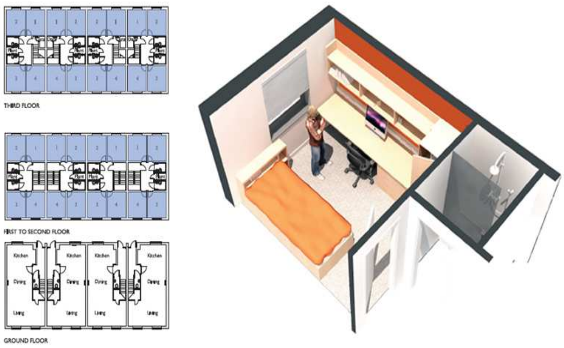
"Wouldn't provide the social side that I'm looking for from uni!" *(Oliver, applicant)*

"A bit more luxurious, but luxurious does not fit with the 'student experience' for me." (Harriet, applicant)

Conceptually, there was fairly dampened interest in the **townhouse accommodation**. Only 11% nominated it in 1st place, and one third put it in 2nd place (32%). It also generated the least buzz amongst respondents in the focus groups. They felt this option was restrictive for social opportunities and that eight housemates sharing a kitchen was too many. It was seen to be least suited to first year students, but better for second or third year students who have ready formed friendship groups.

Townhouse accommodation

Standard single study bedroom; 8 rooms in total over 2 floors. Shower, handbasin & toilet are shared with one other student. All the housemates share a kitchen/diner and lounge area on the ground floor.



"The kitchen is good for people who want to socialise, but the room isn't big enough for 8 people"
(Mantas, student)

"As a fresher I'd prefer to move into halls, as you can socialise more"
(Benitia, student)

"It'd be comfortable but I'd prefer to be in accommodation with lots of people around me"
(Harriet, applicant)

"I'd like this type of accommodation if I could move in with a group of friends" ***(Luke, student)***

Being able to afford university life is a theme throughout both this report and the fuller report published as part of this research. It therefore comes as no surprise to hear that the **economy concept** was given an initial warm welcome in the focus groups even though the very word "economy" has negative connotations. But there are other qualities that are important to students and applicants when choosing accommodation, namely cleanliness, good maintenance and having space, and as the economy concept suggests being busy, this in turn rings alarm bells about messiness and the ability to maintain the space in good condition. In the survey this view was vindicated with quite low levels of interest in this option (in the absence of costs being assigned) - 8% put it in first place, and 11% in second place.

Economy room

Standard single study bedroom in a corridor; 10-12 rooms in total. Each shares a bathroom and toilet facilities with 2 other students. All the flatmates share a kitchen/diner.

"Seems like a lot of people to share a kitchen so there would have to be enough facilities"
(Benitia, student)

"At the moment I live somewhere similar but we just share 6 to a kitchen about that size"
(Luke, student)

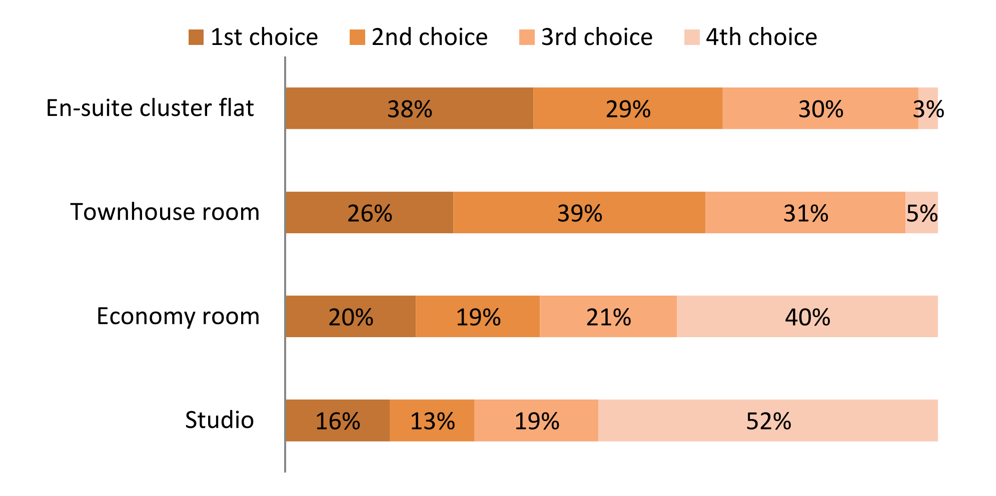
"Looks like what I'd expect really - basic but comfortable student accommodation"
(Harriet, applicant)

"I would not want to share a bathroom"
(Alexandra, student)

Preferred accommodation styles (costs assigned)

Figure 26 below shows the impact of assigning a relative cost on preferences for each of the four accommodation concepts.

Figure 26: Accommodation concept preferences, with price revealed

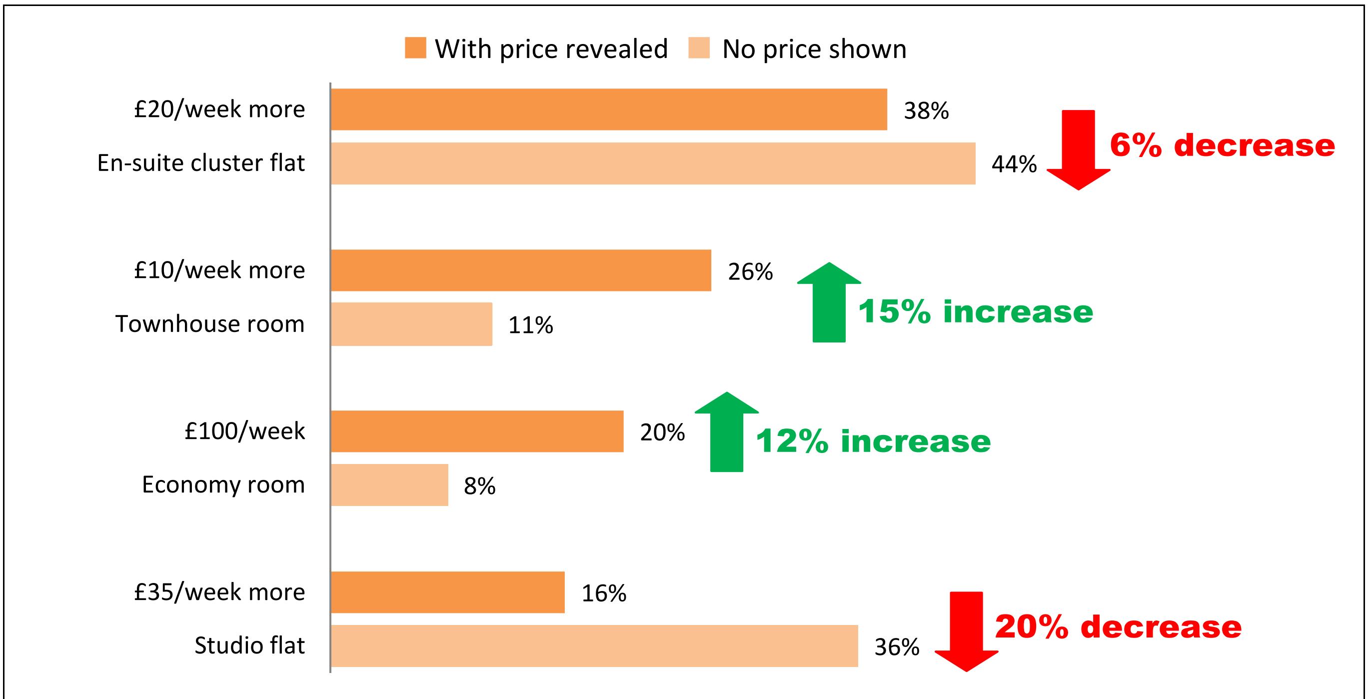


Base: All respondents, n =1507.

QD12 Given the cost of each option, which of these kinds of accommodation would you most like to live in?

To illustrate the full impact, figure 27 illustrates the increase and decrease in first choice preference for each of the concepts, before and after the price was revealed.

Figure 27: Impact of price on first choice preference



Base: All respondents, n =1507.

QD11 Which of these types of accommodation would you most like to live in?

QD12 Given the cost of each option, which of these kinds of accommodation would you most like to live in?

The **en-suite cluster flat** was the most popular 'first choice' before the price was revealed (44% selected it as first choice), and while it costs £20 more per week than the cheapest option, it remained the most popular 'first choice', with 38% saying it was their first choice once the price was revealed. The modest weakening in preference (6%) was due to increased preference for the townhouse and economy rooms.

The **townhouse concept,** which was the 3rd most popular 'first choice' prior to prices being revealed, saw the largest (15%) increase in popularity once prices were revealed and became the 2nd most popular 'first choice' concept. At only £10 more per week than the economy room, it gained in popularity at the expense of the en-suite cluster flat and the studio flat.

Interestingly, while the **economy** room was in the weakest position before pricing was revealed, its popularity grew significantly (12%) as it became clear that this was the most affordable solution.

The **studio flat** took the most significant hit in terms of popularity, moving from second to fourth place as a 'first choice'. When it was revealed to cost £35 more than the economy room, only 16% made it their first choice compared to 36% previously, a drop of 20%.

The impact of cost is evident across students from all types of universities.

Conclusions

Prior to prices being assigned the en-suite cluster was the most popular choice, followed by the studio flat. Once prices were introduced the popularity of the en-suite facility declined but only marginally, whereas the drop was more significant for the studio flat. This meant that the six to eight bed en-suite cluster flat maintained its top position in terms of popularity. With prices revealed, both the townhouse and economy rooms gained in popularity, primarily at the expense of the studio flat.

These findings suggest that there is a market for both the more luxurious solutions such as the en-suite cluster flat, and to a far more limited extent, the studio flat. However given that students are very cost-conscious, and that many are dissatisfied with the pricing of their current accommodation, the findings also suggest that there's demand for the cheaper options, including the standard halls of residence (i.e. economy) model for the first year at university and the townhouse concept for subsequent years.

Appendix 1: Methodology

YouthSight conducted a full service research project on behalf of UPP. This project used a mixed methods methodology incorporating both qualitative and quantitative elements, divided into two separate phases:

- **Phase one** consisted of two 90-minute online focus groups with university applicants due to start in academic year 2012/13 and current university students. Participants had either applied to, or currently attended, a university served by UPP. The focus of this phase was to explore in depth the student experience in terms of the academic aspect and more importantly, from a social and facilities point of view. Crucially for UPP, the non-academic aspect of the student experience discussion gathered views and requirements in regard to accommodation.

  Deliverables: Transcripts from both focus groups and a full report based on the focus group findings.

- **Phase two** aimed to quantify applicant and students' expectations of university, and students' current satisfaction with their experience at university. An online survey of a total of 1,507 applicants and students took part.

  Deliverables: Customised tables, an Excel file of the verbatim from any open questions and "Other" answer categories. A full report based on the findings was also delivered.

Sample size and composition

Phase one: All participants were recruited from YouthSight's OpinionPanel Community. In total, 17 respondents took part in the two focus groups:

- Group 1: Students (9 respondents)
- Group 2: Applicants (8 respondents)

Participants in both groups were either currently studying at, or had applied to, one of the twelve universities served by UPP. These include:

- Exeter, The University of
- Imperial College of Science, Technology and Medicine
- Kent, The University of
- Lancaster, The University of
- Leeds Metropolitan University
- Loughborough University
- Nottingham, The University of
- Nottingham Trent University
- Oxford Brookes University
- Plymouth, The University of
- Reading, The University of
- York, The University of

Any questions...

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Quotas were set to achieve sample from only the 12 specified universities and to achieve a roughly equal gender mix in both groups.

Phase two: A total of 1,511 respondents participated in the survey. However, four respondents were removed from the dataset as part of our quality assurance process, resulting in a dataset based on 1,507 respondents. Of these 1,507 respondents, 751 were applicants and 756 were students. Applicants were recruited from YouthSight's Applicant Panel, while students were recruited from our Student Panel.

Quotas were set to achieve 750 completed interviews with applicants and 750 interviews with students.

Incentives

Phase one: Participants were incentivised with £20 in Amazon or Bonusbond vouchers for participating in the group. Bonusbond vouchers can be spent like cash at a wide range of high street shops.

Phase two: Participants were incentivised with £1 in Amazon or Bonusbond vouchers for completing the survey.

Questionnaire/discussion guide

Phase one: The discussion guide was designed by YouthSight in conjunction with UPP and ARP Consulting.

Phase two: Insights from phase one of the project were incorporated into this questionnaire which was designed and developed by YouthSight in conjunction with UPP and ARP Consulting.

The discussion guide and questionnaire are provided as a separate appendix.

Fieldwork timing

Phase one: The student focus group was held on March 13th 2012. The applicant focus group was held on March 14th 2012.

Phase two: Fieldwork ran from 16th to 27th April 2012.

Data processing

Data processing is carried out in-house by our team of DP and IT professionals. Data is checked for consistency using automated logic checks during collection on the web. At the analysis stage, the data is again checked using both industry-standard automated methods and by employing manual, visual and sense checks. Client deliverables are thoroughly compared to raw data toplines to ensure they reflect the collected data.

Data analysis

Phase one: Transcripts from the online groups were analysed using a classic content analysis approach. Verbatim quotes from the groups are included in the report to bring the research to life and illustrate the way young people talk about the issues involved. Counts were also used to understand to how frequently issues were mentioned.

Phase two: YouthSight processed the data to produce a set of data tables with analysis breaks by:

- Academic status (applicant, student)
- Gender (male, female)
- Fee status (pay home fees, pay overseas fees)
- University campus preference (campus, not a campus, either/don't know)
- Region (Northern England, Midlands, South East, Scotland, Northern Ireland, Wales)
- Current accommodation (only asked of students) (student-specific, not student specific)

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