



London Borough of Lambeth

Student Housing Assessment
November 2013

1. Higher education provision in Lambeth

- 1.1 There are 41 higher education institutions in London funded by the Higher Education Funding Council for England (HEFCE): 12 universities, nine higher education colleges, and 20 colleges and schools of the University of London (including the University of London itself).
- 1.2 In addition there are 39 further education colleges (FECs) offering higher education courses, of which 15 are funded directly by the HEFCE and all but one teach students registered at higher education institutions.
- 1.3 London's higher education student population is 425,245 students, equating to 317,265 full time equivalent students (FTEs)¹.
- 1.4 There are two known providers of higher education in Lambeth: King's College London, which is a higher education institution funded by the HEFCE; and Lambeth College, a further education college which offers higher education courses. London South Bank University is also located close to the borough boundary, within LB Southwark.
- 1.5 There were 21,388 full time equivalent students studying at King's College London in 2012/13, across five campuses. Two of these campuses are located wholly in Lambeth: Waterloo and St Thomas' campuses; and a further campus, Denmark Hill, is located partially in Lambeth and partially in LB Southwark. The Waterloo Campus provides facilities for the Florence Nightingale School of Nursing and Midwifery, School of Biomedical Sciences, School of Social Science and Public Policy, and London Dental Education Centre, part of the Dental Institute. The St Thomas' Campus is the home of continuing medical and dental teaching. The Denmark Hill campus provides facilities for the School of Medicine, the Dental Institute, and is the home of the Institute of Psychiatry.
- 1.6 King's College provides accommodation for students in halls of residence close to its teaching campuses in Waterloo and St Thomas'. These facilities are listed in table 1 below. There are also places available to King's students in the Intercollegiate Halls of Residence.
- 1.7 Lambeth College is a general further education college with two main centres in Clapham and Vauxhall and a smaller centre close to Brixton. The college has approximately 7,100 students (FTEs, 2011/12), the majority of which are 19 years or over, with a significant proportion of students studying at entry and lower levels.

2. Purpose-built student accommodation in Lambeth

- 2.1 This section of the report provides a snapshot of student accommodation provision in Lambeth as at November 2013. Student accommodation is accounted for and monitored annually as part of overall housing provision. However, the council will in future monitor student accommodation separately, recognising that student housing meets distinct needs.

¹ Regional profiles of higher education March 2012, Higher Education Funding Council for England

Existing provision

- 2.2 There are four university owned and operated student residences located in Lambeth – one of which is operated by the University of Westminster and three operated by King's College London. A further five residences provide privately owned and operated accommodation, which is let directly to students. One residence, the Glassyard Building in Stockwell Green, is operated privately but has a nomination agreement in place which means that 258 of the 328 rooms are reserved for students at the University of Arts.
- 2.3 This existing purpose-built accommodation provides 1,573² bedspaces for students at nine locations in Lambeth, as set out in table 1. Most of these residences are concentrated in the north of the borough.

Table 1 Student accommodation developments: existing (November 2013)

| Institution / operator | Residence | Bedspaces | Address |
|---------------------------|----------------------------|--------------------|--|
| Kings College London | Brian Creamer House | 69 | Lambeth Road, London SE1 7JY |
| | The Rectory | 28 | Lambeth Road, London SE1 7JY |
| | Stamford Street Apartments | 552 | 127 Stamford Street, London SE1 9NQ |
| University of Westminster | International House | 83 | 1-5 Lambeth Road, London SE1 7DQ |
| Liberty Living | Liberty Fields | 79* | 10 Halmere Road, London SE5 9LN |
| Mansion Student | Mansion Tower | 229* | 60 Courland Grove London SW8 2PX |
| Horizons | Durand House | 44* | Hackford Road, off Liberty Street, London SW9 0RD |
| Collegiate AC | Academic House | 69 | Herne Hill, London SE24 9QH |
| Mansion Student | Mansion Hub | 92* | 21-25 South Lambeth Road, Vauxhall, London SW8 1SU |
| Fresh Student Living | Glassyard Building | 328 | 7a Stockwell Green, London SW9 9JF |
| Total | | 1,573 ³ | |

* A proportion of rooms have capacity to be single or multiple occupancy (ie twin rooms) and therefore the number of bedspaces within these facilities will vary year on year.

Lambeth's student accommodation pipeline

- 2.4 Three student housing developments were completed in 2013/14, resulting in an increase in purpose-built bedspaces in the borough from 1,084 to 1,573.
- 2.5 Academic House, Mansion Hub and the Glassyard Building are new-build student residences completed in 2012/13. Mansion Tower was acquired by Mansion Student in 2011 and converted to student accommodation in 2012.

² This is a conservative estimate, taking account of rooms with multiple occupancy only where known.

³ As above.

- 2.6 In November 2013 there were two large student accommodation schemes under construction, providing 1,495 bedspaces. When completed, York House 199 Westminster Bridge Road will be the largest purpose-built student residence in Lambeth, providing 1,093 rooms. These schemes are detailed in table 2 below.
- 2.7 There are a further five student housing schemes with extant planning permissions, that would, if implemented, collectively provide a further 1,085 student rooms. These schemes are detailed in table 3.

3. The London context

- 3.1 Drivers Jonas Deloitte first undertook a Crane Survey specialising in London student housing in 2009. The latest annual update was published in October 2012. The survey details student housing schemes with over 50 bedspaces completed, under construction or with unimplemented planning permission across London as at the end of June 2012.
- 3.2 The survey highlights an increase in student numbers in 2012 over the previous academic year by approximately 2.3 per cent, to 289,905 (Higher Education Statistics Authority data). It advises that at the time the research was carried out there were around 59,000 purpose-built student bedspaces across London, providing for 20 per cent of students; an increase from 18 per cent in their 2009 survey. Although there was no Crane Survey published in 2013, separate research published by Deloitte Real Estate in 2013 reports that the number of students in London rose to 294,555 in 2013/14 and the number of purpose-built student bedspaces rose to 66,787.
- 3.3 The 2011 Crane Survey reported a significant rise in the number of student housing schemes under construction in London since the previous year, resulting in an increase in bedspaces by almost 90%, from 4,078 to 7,744. The research indicates that the pace of student housing development across London has been maintained in 2012, with almost 2,800 bedspaces (22 schemes) under construction in June 2012, and a further 29 schemes collectively providing 9,670 bedspaces with planning permission yet to commence construction.
- 3.4 The survey also highlights a significant pick up in the number of schemes completing – with 14 schemes completed since the last survey, delivering 3,862 bedspaces across London and representing a 45 per cent increase compared with the 2011 findings.
- 3.5 The survey identifies that in June 2012 Lambeth had the 9th largest supply pipeline of the 33 London boroughs, with close to 1,400 bedspaces at application stage, with planning permission or under construction. At that time, Lambeth had the highest number of bedspaces at application stage.

Table 2 Purpose-built student accommodation: under construction (November 2013)

| Address | Ward | Planning ref. | Status | Decision date | Bedspaces | Type | Other uses provided | Link to University |
|---|---------|---------------|----------|---------------|-----------|---------------------------|---|---|
| 2-16 Tinworth Street, 92-112 Vauxhall Walk and pavement in front of 5 and 7 Glasshouse Walk | Princes | 11/04510/FUL | Approved | 14.08.2012 | 402 | Studios and cluster units | C1 hotel (120 bedrooms); A1 retail; B1 small business units; D1 community centre; associated student welfare and community facilities including: laundry, games room, lounge, cinema room, study area, gym, reception area. | None specified |
| York House 199 Westminster Bridge Road London | Bishops | 12/04421/FUL | Approved | 06.03.2013 | 1,093 | Studios and cluster units | D1 college; B1 affordable workspace. | Agreements with DLD College (200 bedspaces) and LSE (450 bedspaces) |
| Total | | | | | 1,495 | | | |

Table 3 Purpose-built student accommodation: unimplemented planning permission (November 2013)

| Address | Ward | Planning ref. | Status | Decision date | Bedspaces | Type | Other uses provided | Link to University |
|---|-------------|---------------|----------|---------------|-----------|---------|---|--------------------|
| 441-447 Brixton Road and 2-4 Electric Avenue | Coldharbour | 11/00969/FUL | Approved | 12.01.2012 | 24 | Studios | A1 retail at ground and first floors. | None specified |
| 379 – 381 Brixton Road London | Coldharbour | 11/04146/FUL | Approved | 25.06.2012 | 30 | Studios | A1 retail unit retained at ground-floor. | None specified |
| Land bounded by Wandsworth Road to the west, Parry Street to the north and Bondway and Railway line to the east, London | Oval | 11/04428/FUL | Approved | 02.07.2013 | 359 | Studios | C3 residential (604 dwellings); B1 office (14,722sqm GIA); A1-A5 (3047sqm); C1 hotel (438 bedrooms); sui generis hostel (40 bedroom replacement homeless hostel); D2 cinema; D2 | None specified |

Lambeth Student Housing Assessment November 2013

| Address | Ward | Planning ref. | Status | Decision date | Bedspaces | Type | Other uses provided | Link to University |
|--|---------|---------------|----------|---------------|-----------|---------------|--|--------------------|
| | | | | | | | gym; new public square and children's play area. | |
| 30-60 South Lambeth Road London SW8 | Oval | 11/04181/FUL | Approved | 04.03.2013 | 572 | Cluster units | D2 leisure uses (swimming pool and gymnasium) | None specified |
| Land adjacent to 202 Lambeth Road London SE1 | Bishops | 13/01343/FUL | Approved | 30.08.2013 | 100 | Studios | A1, B1 and D1 (143sqm commercial unit; A1, B1 and D1 (refurbishment of three existing railway arches to accommodate two commercial units totalling 210sqm) | None specified |
| Total | | | | | 1,085 | | | |

4. Rents

- 4.1 Table 4 gives a summary of the room types and comparative rental costs of purpose-built student accommodation in Lambeth.
- 4.2 Rents, not unexpectedly, vary depending on the type of unit provided and the location, ranging from £98.70 per person per week for cluster accommodation at International House (operated by the University of Westminster) to £342.00 per person per week for a self-contained studio at the newly completed Mansion Hub in Vauxhall. In all cases the accommodation provided by the Universities themselves is cheaper than privately operated direct let units.
- 4.3 In comparison, the median rent for a room in the private rented sector across Lambeth is £115 per week and for a studio £185 (GLA London Rents Map).
- 4.4 Drivers Jonas Deloitte's Crane Survey 2012 records the average rent for student housing in London to have risen from £134 per week per bedspace in 2010, to £170 in 2012⁴. This is 67 per cent higher than rents across the UK as a whole, which averaged £102 per week for 2012/13. The 2011 survey recorded rents in London as 55 per cent higher than across the UK as a whole, suggesting that this gap is increasing.
- 4.5 Within London, the average direct let rent across all unit types reported in the Crane Survey 2012 was £231 per week, a 2.2 per cent increase on the £226 per week recorded in the previous academic year and 70 per cent higher than the university average rent of £135 per week. This can be partly explained by the fact that almost half of the direct let bedspaces are private flats and studios, which command a higher weekly rent than the standard cluster accommodation in the majority of the university stock. The research shows that rents for the very best direct let studios now stand at around £330 per week – but in some cases can reach in excess of £500 per week.

⁴ Deloitte Real Estate reports that this figure rose to £177 per week in 2013 (Student Housing 2013 The evolving market, Deloitte Real Estate).

Table 4 The range of rental levels in existing purpose-built student accommodation in Lambeth (November 2013)

| Address | Postcode | Bedspaces | Type | Universities | Rent p/w single use | | Tenancy | Developer / owner |
|---|----------|-----------|--|--|---------------------|---------|-------------------------------|---------------------------|
| | | | | | min | max | | |
| International House, 1-5 Lambeth Road, London | SE1 7DQ | 83 | Cluster flats, shared bathrooms and kitchens | University of Westminster | £98.70 | £114.80 | 37 weeks | University of Westminster |
| Liberty Fields, 10 Halsmere Road, London | SE5 9LN | 79 | Studio flats and twin studios | All | £245.00 | £280.00 | 42 or 51 weeks | Liberty Living |
| Glassyard Building, 7a Stockwell Green, London | SW9 9JF | 328 | Studios and cluster flats | All, 258 rooms reserved for University of Arts | £235.00 | £275.00 | 51 weeks | Fresh Student Living |
| Mansion Hub, 21-25 South Lambeth Road, London, | SW8 1SU | 92 | Studios (single and twin occupancy) | All | £237.00 | £342.00 | 42 or 51 weeks (+ short lets) | Mansion Student |
| Mansion Tower, 60 Courland Grove, London | SW8 2PX | 229 | Studios (single and twin occupancy) | All | £278.00 | £315.00 | 42 or 51 weeks (+ short lets) | Mansion Student |
| Brian Creamer House, Lambeth Road, London | SE1 7JY | 69 | Cluster flats, shared bathrooms and kitchens | Kings College London | £127.54 | £127.54 | 40 weeks | Kings College London |
| The Rectory, Lambeth Road, London | SE1 7JY | 28 | Cluster flats, shared bathrooms and kitchens | Kings College London | £127.54 | £127.54 | 40 weeks | Kings College London |
| Stamford Street Apartments, 127 Stamford Street, London | SE1 9NQ | 552 | Cluster flats, shared bathrooms and kitchens | Kings College London | £151.76 | £168.49 | 40 weeks | Kings College London |
| Academic House, Herne Hill, London | SE24 9QH | 69 | Studios and cluster flats | All | £179.50 | £250.00 | 51 weeks or 44 weeks | Collegiate AC |
| Durand House, Hackford Road, off Liberty Street, London | SW9 0RD | 44 | Studios and cluster flats | All | £210.00 | £245.00 | Variable | Horizons |

5. Summary

- 5.1 The analysis of existing purpose-built student accommodation in Lambeth and the development pipeline is summarised in table 5 below. This identifies 1,573 existing bedspaces in the borough, two schemes currently under construction (providing 1,495 bedspaces), and five schemes with planning permission (providing 1,085 bedspaces). At the time of writing there were no planning applications proposing student accommodation pending decisions.

Table 5: Summary of purpose-built student accommodation in Lambeth

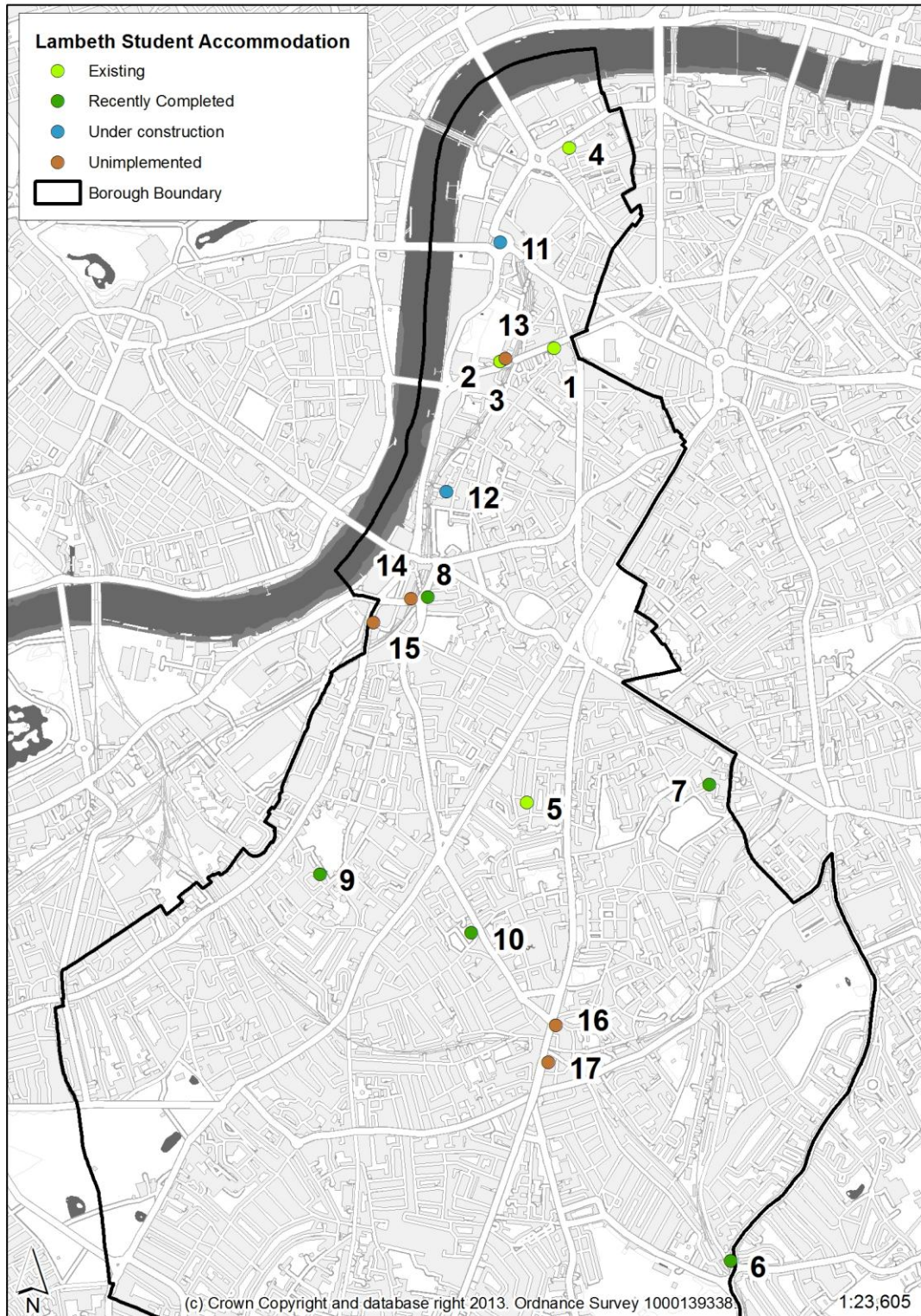
| | No. of bedspaces ⁵ |
|--|-------------------------------|
| Total existing | 1,573 |
| Total pipeline | 2,580 |
| Under construction | (1,495) |
| Schemes with planning permission | (1,085) |
| Planning applications with decisions pending | 0 |

- 5.2 There has been a significant increase in student accommodation provision in Lambeth over the past five years. The number of existing student bedspaces in the borough has increased by 84 per cent since 2011 – from 885 bedspaces to 1,573. This has arisen through the conversion of a large block, formerly providing hostel accommodation, to 229 student rooms in 2012, and the completion of three new-build developments in 2013/14, which provided a further 489 bedspaces. As can be seen above, the development pipeline remains healthy, with two schemes currently under construction and a further five with planning permission yet to commence construction.
- 5.3 The 2012 Crane Survey published by Drivers Jonas Deloitte comments that the impact of more restrictive planning policies in boroughs which have delivered the most student accommodation development in recent years (eg Camden, Islington and Southwark), has been to encourage developers to look at other boroughs, such as Lambeth. The concern for Lambeth is that if the growth in student accommodation continues at current levels, capacity to meet the need for conventional dwellings, especially affordable homes, is likely to be compromised. The concentration of student accommodation in particular locations also has the potential to undermine policy to secure mixed and balanced communities.
- 5.4 The London Plan sets a monitoring target for overall housing provision for the period 2011-2021; Lambeth's target is 11,950 (an annual target of 1,195). The housing targets are derived from the London Strategic Housing Land Availability Assessment 2009 (SHLAA). There is no strategic requirement for boroughs to identify sites for student housing, and no specific top down targets (unlike for affordable housing). However, total housing capacity includes a component from non self-contained units which is calculated using the development trend of residential units which do not fall within the C3 planning use class. Ninety per cent of all non self-contained development in London is student accommodation. The other 10 per cent is hostel accommodation.

⁵ This is a conservative estimate, taking account of rooms with multiple occupancy only where known.

- 5.5 The disaggregated monitoring benchmark for non-self contained accommodation in Lambeth is 9 units per annum between 2011/12 and 2020/21 (see London Plan 2011 Table A4.1). That equates to 90 units in total over the 10 year period, 90 per cent of which is 81. As illustrated in table 5, Lambeth has far exceeded the estimated component of non self-contained housing.
- 5.6 While it is accounted as part of overall housing provision, the council will continue to monitor student housing provision separately, recognising that this type of accommodation meets a distinct need.
- 5.7 Average rents have continued to rise such that in London, and in Lambeth, rents for purpose-built student accommodation are significantly higher than for conventional housing in the private rented sector, though it is acknowledged that this does not necessary include the quality of accommodation, services or levels of privacy that private halls of residence provide.

Appendix 1 – Lambeth Student Accommodation



| Number | Address | Status | No. of bedspaces |
|---------------|---|--------------------|-------------------------|
| 1 | International House, 1-5 Lambeth Road, London SE1 7DQ | Existing | 83 |
| 2 | Brian Creamer House, Lambeth Road, London SE1 7JY | Existing | 69 |
| 3 | The Rectory, Lambeth Road, London SE1 7JY | Existing | 28 |
| 4 | Stamford Street Apartments, 127 Stamford Street, London SE1 9NQ | Existing | 552 |
| 5 | Durand House, Hackford Road, off Liberty Street, London SW9 0RD | Existing | 44 |
| 6 | Academic House, 128 Herne Hill, London SE24 9QH | Recently Completed | 69 |
| 7 | Liberty Fields, 10 Halmere Road, London SE5 9LN | Recently Completed | 79 |
| 8 | Mansion Hub, 21-25 South Lambeth Road, London SW8 1SU | Recently Completed | 92 |
| 9 | Mansion Tower, 60 Courland Grove, London SW8 2PX | Recently Completed | 229 |
| 10 | Glassyard Building, 7a Stockwell Green, London SW9 9JF | Recently Completed | 328 |
| 11 | York House, 199 Westminster Bridge Road, London | Under construction | 1093 |
| 12 | 2-16 Tinworth Street, 92-112 Vauxhall Walk and pavement in front of 5 and 7 Glasshouse Walk, London | Under construction | 402 |
| 13 | Land adjacent to 202 Lambeth Road, London | Unimplemented | 100 |
| 14 | 30-60 South Lambeth Road, London | Unimplemented | 572 |
| 15 | Land bounded by Wandsworth Road to the west, Parry Street to the north and Bondway and Railway line to the east, London | Unimplemented | 359 |
| 16 | 379 – 381 Brixton Road, London | Unimplemented | 30 |
| 17 | 441-447 Brixton Road and 2-4 Electric Avenue, London | Unimplemented | 24 |