

09 October 2020

Delivered by email

Carmel Edwards
c/o the Planning Policy Team
London Borough of Lambeth
PO Box 734
Winchester
SO23 5DG

Dear Carmel,

EXAMINATION OF DRAFT REVISED LAMBETH LOCAL PLAN PROPOSED SUBMISSION VERSION 2020-2035

On behalf of our client, Alumno Group, we hereby submit further representations in relation to the Draft Revised Lambeth Local Plan.

INSPECTOR'S MATTERS, ISSUES AND QUESTIONS (MIQ) DISCUSSION NOTE

The Inspector's Matters, Issues and Questions was issued on 14 September 2020 ahead of the Examination Hearings which will commence on 27 October 2020. Paragraph 3.6 relating to Matter 3 (Housing) proposed the following discussion:

Student housing: Is policy H7 justified? What is the evidence to state that two student housing units within 500m of each other has an unacceptable impact on residential amenity?

For the avoidance of doubt, we would like to clarify that our representations submitted on 13 March 2020 (RO59 – Turley for Alumno Group) did not raise issues with matters relating to Policy H7 Part A (i), (iii), or the requirement for 10% wheelchair accessible units as stipulated in LB Lambeth's Regulation 22 Consultation Statement (May 2020).

WHAT PART OF THE DOCUMENT IS UNSOUND?

Part A (iv) of Policy H7 (Student Housing) of the Draft Revised Lambeth Local Plan. We do not consider this policy to be sound and compliant with National Policy on the basis that certain parts of this policy preclude development due to its current wording and evidence.

8th Floor
Lacon House
84 Theobald's Road
London
WC1X 8NL

T 020 7851 4010 turley.co.uk

WHICH SOUNDNESS TEST(S) DOES IT FAIL?

We do not consider Part A (iv) Policy H7, in its current form, to be positively prepared, justified, effective or consistent with national policy as per test of soundness in Paragraph 35 of the National Planning Policy Framework (2019).

WHY DOES IT FAIL?

What is the evidence to state that two student housing units within 500m of each other has an unacceptable impact on residential amenity?

Turning to the consideration of unacceptable impact, purpose built student accommodation (PBSA) schemes are designed and managed to avoid detrimentally affecting the amenity of local residents. The developers of such a product are long-term key stakeholders, including our client Alumno, who have a substantial portfolio of successful PBSA schemes across the UK. Their reputation is dependent upon the responsible management of the student accommodation premises to ensure the amenity of neighbouring properties is not adversely affected and the proposals will positively integrate within the local community. It is an established practice for PBSA developers to prepare and submit a Student Management Plan which addresses matters of noise, disturbance and anti-social behaviour as well as setting up regular meetings with local resident and business groups, and also providing contact points for neighbouring occupiers to alleviate these concerns. Local planning authorities are able to use conditions and planning obligations to limit unacceptable impact, so long as there is a clear justification and all of the relevant tests for their use are met. PBSA currently through legal agreements, CIL and on site facilities support and help deliver these important elements of a mixed and collaborative community to mitigate potential impacts on residential amenity.

The student population should be afforded an equal standing as provided to residents given that they contribute significantly to the local and wider economy as well as local and regional housing targets. In addition, the provision of PBSA alleviates pressure on housing land supply in the same respect as a new residential development and therefore reduces pressure on other elements of the housing stock which would typically be occupied by students in the private rented sector. It could also be argued that the student population put less strain on local infrastructure than typical residents given that they are subject to a building management system that control waste and servicing and student's time is often split between the HEI campuses or within the PBSA which offer a level of amenity catered towards students.

The draft new London Plan acknowledges that Town Centres are suitable to accommodate a diverse range of housing which should be considered and encouraged, including student accommodation. PBSA providers and higher education institutions (HEI) are encouraged to develop student accommodation in locations well-connected to local services by walking, cycling and public transport, as part of mixed-use regeneration and redevelopment schemes that therefore have the existing infrastructure and capacity to absorb such uses. Topic Paper 9 (Particular Types of Housing, January 2020) fails to justify or evidence why two student housing units within a 500 metre radius or indeed schemes of this nature are considered to adversely affect the mix and balance of population in a neighbourhood. Surely the proposal of two different products in itself aids to a mixed and balanced community (with LSPBSL not being PBSA). Topic Paper 9 makes reference to the approach and thresholds of PBSA implemented in other London Boroughs however it does not draw a substantive conclusion to this but rather that the mix and balance of any particular community is context-specific and is assessed on a case by case basis which is in contrast to this current assessment.

The delivery of PBSA in areas such as Vauxhall are discouraged due to a perceived overconcentration yet contradictory to this, when discussing schemes of this nature (large scale purpose built shared living (LSPBSL)), these development proposals are supported. Topic Paper 9 describes the likes of Vauxhall and Waterloo to be appropriate locations because of their high levels of public transport access, central location, existing high density uses and access to a range of services and facilities available within the neighbourhoods. More importantly, it notes that very high density living for this demographic places demands on communal public and open spaces because of the limited provision of external amenity space within the development, and it is appropriate for this to be met in central London spaces already used by large numbers of workers and tourists. For these reasons, it is considered more appropriate to locate LSPBSL in higher-density centrally located mixed use areas such as Waterloo and Vauxhall, rather than lower density residential areas where there will be a greater contrast between the types of accommodation and lifestyles of the new and existing residents could cause greater harm to the mix and balance of the community. For the same reasons set out above and justified by LB Lambeth, it is integral that the development of PBSA is not precluded in appropriate locations and not be subject to the overconcentration considerations of Part A (iv) of Policy H7 which is intrinsically linked to the assessment of schemes within a 500m radius.

Against this background, we question how the arbitrary distance of having similar uses within 500 metres of each other equates to over-concentration and therefore result in unacceptable impact on residential amenity especially given the suitability of certain locations for such developments. Applications made, specifically in relation to Policy H7, should be assessed on a case by case basis having regard to the location of the site, local circumstances, availability, suitability and likely economic viability (NPPF Para. 67). It is unclear how the notion of 500 metres was derived and why this would be considered over concentration and this is not consistent with national policy.

Is policy H7 justified?

We acknowledge that the London Plan in its adopted and drafted form note that meeting the requirement for purpose built student accommodation (PBSA) should not undermine policy to secure mixed, balanced and inclusive communities. This is discussed as being a key planning consideration in considering the matter of overconcentration as outlined in Topic Paper 9. The London Plan sets out that mixed and balanced communities (Policy 3.9) refers to the need for mixed tenures, social diversity and to redress segregation. The draft new London Plan good growth objectives (GG4 - Delivering the homes Londoners need) similarly refers to creating mixed and inclusive communities, with good quality homes that provide for identified needs, including specialist housing. At a local level the Proposed Submission Version of the Revised Lambeth Local Plan does not define this per se but refers to a mixed and balanced community being the provision of a choice of housing be it through mix, tenure and type of housing. When considering this in respect to Policy H7 it is apparent that PBSA contributes to social diversity and achieving a mixed and balanced community. This should be further considered and justified within the Local Plan given the ambiguity surrounding this. It is considered that the use of an over-concentration test is neither justified, positively prepared nor consistent with national policy in relation to Policy H7 and therefore PBSA.

LB Lambeth's Topic Paper 9 rightfully addresses that the principle of assessing PBSA in relation to mixed and balanced communities was established in the adopted London Plan and whilst reference is made to Paragraph 3.35 and 3.53 regarding the encouragement of a more dispersed distribution of future provision of PBSA away from areas of greatest concentration, this sentiment is not applied in the draft new London Plan. Given the advanced stage of this plan, policies contained in the Intend to Publish London Plan (December 2019) carry weight in decision and plan making, as such these paragraphs should not be relevant in the consideration and justification for Policy H7 of the Revised Lambeth Local Plan.

The Mayor established a forum for HEI's and further education establishments to work with boroughs and other stakeholders to plan future developments, including student accommodation, in locations which are well-connected to public transport. The latest set of meeting notes from the Mayor's Academic Forum (July 2017) to discuss the development of the new PBSA policy for the draft new London Plan highlights that members discussed the development of PBSA in locations well connected to local services by walking, cycling and public transport but away from existing concentrations in central London however they considered that proximity of the PBSA to the HEI was important. Extra travel costs and increased travel times are considered to cause negative impacts on student's well-being, as well as the potential for students to feel isolated if they are too far away from campus. In addition to further representations received from HEI's and key stakeholders, the point relating to existing concentrations was subsequently removed from the draft new London Plan policy pertaining to PBSA (Policy H15, formerly Policy H17). This is no longer relevant and LB Lambeth's local policies should reflect this to ensure that there is sufficient flexibility to allow developers to cater for demand. Similarly, this should subsequently be removed from the supporting text at Paragraph 5.69 which states that in order to be positively prepared. With reference to Vauxhall, it remains one of the most accessible locations and is within a 10-20 minute journey by public transportation to 22 HEI's in the central sub-region which is home to 179,000 of the capital's 309,000 full-time students (58%)¹. It is noted that PBSA, both existing and proposed, is typically located in the north of the borough, however it is recognised that this is in part due the location of HEI's and excellent public transport connections, particularly from Vauxhall and Waterloo.

Despite the unprecedented circumstances (COVID-19), significant growth is envisaged in full-time student numbers in London. The Mayor's Academic Forum estimated that full-time student numbers might increase to between 458,000 and 486,000 by 2026/27, representing a rise of more than 150,000 students. An independent review of the Student Needs across London (Jeremy Leach Research Ltd, January 2020) highlights that the current levels of provision allow 28.7% of those in need of accommodation at the 22 central sub-region HEI's identified as part of this assessment to have their accommodation needs met by PBSA. The overall strategic requirement for PBSA in London has been established within the Mayor's Academic Forum for 3,500 PBSA bed spaces to be provided annually and despite the recent development of PBSA schemes within LB Lambeth, in particular Vauxhall, these is a demonstrable need and gap identified for this type of accommodation. In spite of recent growth in PBSA within the north of the borough, in comparison to other central sub-region boroughs, the volume of PBSA in LB Lambeth will remain relatively low. There are more than 10,000 PBSA beds in use in the London Borough of Camden and Islington, almost 7,000 beds in the London Borough of Southwark and more than 3,000 beds in Westminster City Council and the Royal Borough of Kensington & Chelsea.

The Topic Paper (9) draws to a conclusion that Vauxhall will be the location of 44% of Lambeth's PBSA and against this basis, limits further student development in the Vauxhall area to maintain the balance of uses by allowing other uses to function and develop. Vauxhall's context is rapidly evolving due to its opportunity area designation which forms part of the largest regeneration zone in central London. It also forms part of London's central activities zone (CAZ). Vauxhall and the wider area are earmarked for significant intensification to deliver 18,500 new homes and 18,500 new jobs (draft new London Plan, 2019) with the capacity to support high density mixed use development. Given the level of development that has been carried out or is in the pipeline within the opportunity area, it is essential that the proportion of uses such as student housing is considered as a whole against the level of overall uses in the area rather than the number of PBSA schemes located here when evaluating concentration and mixed and balanced communities. We do not consider the evidence provided in Topic Paper 9 to justify the need for a prescriptive approach to developments such as PBSA.

¹ Jeremy Leach Research Ltd, January 2020

HOW COULD THE DOCUMENT BE MADE SOUND? WHAT IS THE PRECISE CHANGE THAT IS SOUGHT?

Overall, we do not consider Part A (iv) and supporting text for Policy H7 of the Draft Lambeth Local Plan to be justified and consider that further amendments need to be made in order to enable potential sites to be both developable and deliverable as defined by the NPPF, to ensure that a viable development can be brought forward within the market context and still contribute to place-making. The Local Plan is intended to guide development of the borough over the next 15 years and to preclude development on this basis may result in sites not coming forward for their optimal viable use which would be more sustainable long term and could potentially result in sites being laid vacant. Change is a fundamental characteristic of London and policies should allow for flexibility to respond to this. The London Plan (Para 3.52) highlights that London's universities make a significant contribution to its economy and labour market and that it is important that their attractiveness and potential growth are not compromised by inadequate provision for new student accommodation.

The NPPG (Paragraph 002 Reference ID: 10-002-20190509) clearly states that it is the responsibility of plan makers in collaboration with the local community, developers and other stakeholders, to create realistic, deliverable policies. In order for Policy H7 to be both realistic, deliverable and sound it is considered the following changes are necessary. Specifically the following changes are sought:

In order for Part A (iv) of Policy H7 to be sound it is considered that it should reflect the ambitions in the London Plan. Consequently it is suggested the policy is reworded as followed:

*"iv) would not lead to ~~an over-concentration of similar uses which may be~~ **an unacceptable detrimental impact** to residential amenity ~~or the balance and mix of uses in the area or place~~ undue pressure on local infrastructure;"*

The supporting paragraphs to this Policy should also be amended to reflect the matters discussed above.

Paragraph 5.69 Paragraph 5.69 should also be amended to enable schemes to be considered on a site-by-site basis and not impede on development of this kind in certain areas of the Borough as amended in the Intend to Public London Plan. Consequently it is suggested the policy is reworded as followed:

"When considering the concentrations of students in a single area, the council will have regard to the character of the area, the existing mix of uses, and the particular impact on any permanent residential occupiers. Schemes will be considered on a site-by-site basis having regard to their scale and any existing concentrations (including any sites with extant planning permissions). ~~Given the existing concentration, quantum and pipeline of this type of accommodation in Vauxhall, additional purpose built student accommodation in the Vauxhall part of the NEV Opportunity Area is unlikely to be supported. The London Plan encourages new student accommodation away from existing concentrations in central London.~~"

In relation to over-concentration and how this is defined within the Local Plan, Paragraph 5.126 should also then be amended to reflect this, as follows:

*5.126. ~~Several Schemes of this nature in close proximity, and/or in proximity with student housing schemes, could adversely affect the mix and balance of population in a neighbourhood or result in particular local pressures on services and infrastructure given their very high-density characteristics. The policy therefore would not support proposals~~ **which have been demonstrated to cause an unacceptable impact upon the amenity of nearby residential uses, or upon local services or infrastructure.** ~~with potential to result in an overconcentration of such uses in a neighbourhood. Over-concentration, including purpose-built student accommodation, **This** will be~~*

assessed on a case by case basis, having regard to the location of the site and local circumstances. ~~Generally two uses of this nature, including purpose built student accommodation, will not be permitted on adjacent sites; and there should be no more than two such uses within any given 500m~~

We trust that you will consider our comments and respond accordingly. If you have any queries, please do not hesitate to contact me or my colleague, Rachel Hearn, at this office.

Yours sincerely,



Catriona Fraser
Director

catriona.fraser@turley.co.uk

Appendix 1: Student Needs Assessment

Student Accommodation – Bondway, Vauxhall

Alumno Group Ltd

Study of Need



28th January 2020

Report by:
Jeremy Leach Research Ltd
28 Sutherland Square
London SE17 3EQ
Tel: 020-7701-6283/07415-243015
Email: jeremyleach@posteo.net

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1. Executive Summary

- The numbers of full-time students have been increasing steadily in London following the decline that occurred with the introduction of higher tuition fees in 2011/12 and currently (2018/19) total 308,605, a level that is 51% higher than in 2000/01. Full-time student numbers in London have seen steady growth in the last few years with an average 2.6% rise over the last four years. Between 2017/18 and 2018/19, the most recent year, numbers rose by 2.1%. Demographic factors in terms of the number of 18-year-olds in the UK population are likely to underpin sharp growth in demand for Higher Education over the next 20 years and in particular over the next decade.
- Growth has been particularly strong in the Central sub-region (in which LB Lambeth and the Vauxhall site sit). Since 2009/10, full-time student numbers have increased by 19% compared to the UK average of 15% and 12% across all of the London Higher Education Institutions (HEIs). A number of the larger central London HEIs have seen exceptionally high growth rates over this period with University College London increasing full-time student numbers by 74%, King's College London 48%, City, University of London 33% and Imperial College, the LSE and UAL all by more than 20%.
- Numbers of overseas students (who are markedly more likely to live in purpose-built student accommodation (PBSA) than UK domiciled students) have risen sharply in recent years in London and currently stand at 119,305, a level that is 85% higher than the figure in 2002/03. In the light of this growth and, in spite of the continuing uncertainty as to the full impact of the decision to leave the EU is as yet unclear, many of the major universities in London are undertaking heavy investment including the development of new campuses.
- Overall the growth in full-time student numbers in recent years in London has not been matched by an increase in provision of accommodation by the universities. In London, 17% of students who are in need of accommodation (ie not living at home) are estimated to be housed in university-maintained accommodation compared to the UK-wide figure of 25%. Although private sector developers have moved in to fill this gap, even when the provision of bedspaces by private sector developers is added to the university maintained accommodation, the resulting levels of provision of PBSA (ie university maintained and private sector combined) of those in need of accommodation is 39% in London compared to the UK average of 43%. Levels of provision across the 22 Central London sub-region HEIs are lower still with just 29% of full-time students in need of accommodation being housed in PBSA. For the three major HEIs with campuses within a 2-mile radius of the Bondway site (KCL, UAL and LSBU), the level of provision is lower still with 21% of students in need of accommodation living in PBSA.
- The planning pipeline for student accommodation is currently relatively modest both across London and in the Central sub-region. In total there are some 2,000 rooms under construction across the sub-region with a further 3,000 having received planning consent and just over 2,000 at the application stage.
- The numbers of student accommodation beds have increased significantly in recent years in the Vauxhall area and across Lambeth. There is now a total of 3,774 PBSA beds in use in Lambeth. With the completion of the two developments that are currently under construction in the borough, the total number of beds will rise to 4,748 of which 2,335 will be in Vauxhall.
- In spite of this growth, and in comparison to other Central sub-region boroughs, the volume of PBSA in Lambeth will remain relatively low. There are more than 10,000 PBSA beds in use in

Camden and Islington, almost 7,000 beds in Southwark and more than 3,000 beds in Westminster and Kensington & Chelsea.

- Although care is needed in making use of 2011 Census data, there is evidence of large numbers of full-time students aged 18+ living in the north Lambeth wards who are not housed in PBSA; at the time of the census more than 1,000 students were living in each of the wards north of Clapham Town. The Bondway development offers the opportunity to free up properties currently occupied by students for use by local residents.
- In recent years there has been a trend of development of student accommodation towards well connected transport hubs and there are examples of significantly greater development of PBSA than is occurring in Vauxhall. At Stratford 2,854 bedspaces are in use and at Wembley, either in development or in use, there are 4,488 beds. This compares to the 2,335 bedspaces in Vauxhall which will be in use once the Miles Street development has been completed in September 2021.
- The Bondway site is within 30-minutes journey time of the 22 Higher Education Institutions (HEIs) in the Central sub-region which is home to 179,000 of the capital's 309,000 full-time students (58%).
- The site is exceptionally well located with a PTAL rating of 6b which is the highest rating level. The site is immediately adjacent to the Vauxhall bus, tube and train interchange and offers fast public transport access across the Capital.
- Vauxhall is under 10 minutes journey by public transport from the KCL Waterloo and St Thomas' campuses and the UAL Chelsea College of Arts. It is also under 20 minutes journey to a number of major universities including the LSE, LSBU, Imperial College, the KCL Strand campus and UCL.

2. Detailed Summary

Universities and Student Numbers

- There is a total of 37 Higher Education Institutions (HEIs) in London. For the purpose of analysis, the city tends to be divided into five sub-regions, Central, North, East, West and South. Well over half of all full-time students (58%) study at the 22 HEIs which are based in the Central sub-region.
- The number of students in Higher Education (HE) in the UK has increased sharply since the turn of the century rising by more than 55% from 1.2 million in 2000/01 to the current 2018/19 level of almost 1.9 million. Numbers of full-time students in London have increased at almost exactly the same rate as in the rest of the UK and currently stand at 308,605. This figure represents just under a fifth of all full-time HE students in the UK. Full-time student numbers in London have seen steady growth in the last few years with an average 2.6% rise over the last four years. Between 2017/18 and 2018/19, the most recent year, numbers rose by 2.1%.
- A sharp increase in the number of 18-year-olds in the UK population is likely to prompt significant growth in the demand for Higher Education over the next 20 years and in particular over the next decade. Numbers are projected to rise from the current figure of 598,000 to 749,000 in 2030 before settling back to around an average of 730,000 throughout the 2030s.
- The number of overseas students in full-time study in London has grown significantly. Overseas students now make up 32% of the student body in London compared to just 19% in 2000/01. Overseas students have a particular significance in relation to student accommodation as they are markedly more likely to make use of purpose-built student accommodation than UK domiciled students.
- While overall levels of growth in full-time student numbers across London largely mirror those of the rest of the UK, there are variations amongst the five sub-regions and the individual HEIs. Since 2009/10, full-time student numbers in the Central sub-region have increased by 19% compared to the UK average of 15% and 12% across all of the London HEIs. A number of the larger central London HEIs have grown at far higher rates than the Central sub-region average over this period with University College London increasing full-time student numbers by 74%, King's College London 48%, City, University of London 33% and Imperial College, the LSE and UAL all by more than 20%.
- In the longer term, significant growth is envisaged in full-time student numbers in London. The Mayor's Academic Forum estimated that full-time student numbers might increase to between 458,000 and 486,000 by 2026/27. This represents a rise of more than 150,000 students.
- It remains the case that the HEIs themselves are investing heavily in order to maximise the opportunities that they feel are on offer as Higher Education providers in a global city such as London. Examples include the development by UCL of a large new campus in East London at the Olympic Park, KCL creating a new campus as part of the Canada Water masterplan and Imperial College building its new Imperial West campus at White City. In addition, UAL is making a number of significant campus developments such as the relocation of Central Saint Martins to Granary Square, the London College of Fashion moving to the Olympic Park and the London College of Communication moving to a purpose-built campus within the new Elephant & Castle town centre which will also become the headquarters of the University.

- Two HEIs (LSBU and The University College of Osteopathy) are based within a 2-mile radius of the Bondway site and three others (KCL, UAL and the RCA) have significant campuses also within this distance of the site. Three of the KCL campuses are sited wholly or partly in Lambeth. The Waterloo and St Thomas' campuses are wholly within the borough and the Denmark Hill campus is shared with Southwark. The remaining KCL campuses (Strand and Guy's) are both within a 2-mile radius of the Bondway site. Three of the six UAL campuses are within a 2-mile radius of the Bondway site – Chelsea College of Arts, Camberwell College of Arts and the London College of Communication (LCC). Both Camberwell College of Arts and LCC have undergone or are about to undergo significant expansion and investment. As we have noted, the LCC is moving to a new and custom-built site as part of the forthcoming redevelopment at the Elephant & Castle. The RCA is developing a major new building at the heart of its Battersea campus and this is due to open in autumn 2021.

The Provision of Student Accommodation

- The Bondway site is adjacent to the Vauxhall transport interchange which combines a tube and railway station with a bus station as well as protected cycle routes. The site is within a 30-minute journey by public transport of all of the HEI campuses within the Central sub-region area. As we have seen these are home currently to more than 175,000 full-time students. This report bases its comparisons of the provision of student accommodation in terms of the UK and London overall and a) the HEIs in the Central sub-region (that are all within a 30-minute journey of the Bondway site) and b) the four HEIs that have a significant campus presence within a 2-mile radius of the site.
- The overall requirement for student accommodation is affected by the proportion of full-time students who live in the parental home. In London, the proportion of full-time students in Higher Education who are living at home (24.9%) is higher than the UK average (19.8%). For those studying in the Central sub-region, however, the proportion is somewhat lower (19.7%) partly owing to the higher proportion of overseas students studying at the central London HEIs.
- The proportion of those students in need of accommodation (i.e. the total number of full-time students less those who live at home) who are housed in purpose-built student accommodation (PBSA) is lower than is the case across both the UK and the Capital as a whole a) amongst the Central sub-region HEIs and b) amongst the three main HEIs that have campuses within a 2-mile radius of the Bondway site (KCL, UAL and LSBU).
- Current levels of provision allow 28.7% of those in need of accommodation at the 22 Central sub-regions HEIs to have their accommodation needs met by PBSA and 21.4% of those who are studying at the three principal HEIs with campuses neighbouring the Bondway site.

	UK	London	Central Sub-region	HEIs with campuses neighbouring Bondway
A. Total full-time students (HESA 18/19)	1,883,185	308,605	178,845	55,070
B. Number of students who live at home (HESA)	372,415	76,933	33,981	8,249
C. Total in need of accommodation (A-B)	1,510,770	231,672	144,864	46,821
D. Current Estimated PBSA (Institution Managed/Owned+Private Sector)	650,500	89,088	41,606	10,029
E. Current Gap – Number (C-D)	860,270	142,584	103,258	36,792
F. (%) Level of Provision (D/C)	43.1%	38.5%	28.7%	21.4%

- If we look in more detail at the demand for and supply of accommodation for the three main HEIs within a 2-mile radius of the Bondway site, we can see that provision of PBSA for students at KCL (30.5%) and UAL (30.1%) is close to the Central sub-region average (28.7%) while the level is lower for LSBU (15.1%).
- The table below provides a summary of the structure of student accommodation for the HEIs that have significant campuses within a 2-mile radius of the Bondway site and comparison is made with the Central sub-region average.

	Central Sub-Region	KCL	UAL	LSBU
A. Total full-time students (HESA 18/19)	178,845	26,635	18,395	10,040
B. Number of students who live at home (HESA)	33,981	5,157	2,789	576
C. Total in need of accommodation (A-B)	144,864	21,478	15,606	9,464
D. Usage of PBSA (Institution Managed + Private Sector nomination agreements + estimated usage of private sector PBSA)	41,606	6,542	4,702	1,425
E. Current Gap – Number (C-D)	103,258	14,936	10,904	8,039
F. (%) Level of Provision (D/C)	28.7%	30.5%	30.1%	15.1%

- At the time of the 2011 Census, more than 1,000 full-time students aged 18+ who were not housed in PBSA were living in each of the Lambeth wards north of Clapham Town with 1,234 students living in Oval ward. Clearly care needs to be taken with this data owing to its age and the fact that there have been a number of student housing developments in Vauxhall during that period coupled with the sharp increases that have occurred in student numbers across London. It remains evident, however, that there are substantial numbers of students living in principally private rented accommodation across north Lambeth and that the Bondway development offers opportunities to reduce pressure on local housing by freeing up properties that are currently occupied by students and returning them to occupation by local residents.
- The provision of student accommodation has increased significantly in recent years in the Vauxhall area and across Lambeth. There is now a total of 3,774 PBSA beds in use in Lambeth of which 1,494 are sited in Vauxhall (Spring Mews 378 beds; The Hub 92; Urbanest Vauxhall 454 and The Atlas 570). With the completion of the two developments that are currently under construction in Lambeth (Marinus Studios 133 beds and Miles Street 841), the total number of beds in the borough will rise to 4,748 of which 2,335 will be in Vauxhall.
- In comparison with other Central sub-region boroughs the amount of PBSA in Lambeth will remain relatively low (even after the completion of Miles Street in September 2021). There are two distinct layers of provision in the Central sub-region with:
 - More than 10,000 PBSA beds in Camden (12,728) and Islington (10,012).
 - More than 3,000 beds in Southwark (6,904), Westminster (3,857), Kensington & Chelsea (3,881) and Lambeth (currently 3,774 rising to 4,748).

Based on current applications and consented schemes there is also the potential for significant growth in PBSA provision in neighbouring Central sub-region boroughs with a further 2,202 bedspaces currently consented in Southwark (most notably Capital House (905 beds) and Mulberry Business Park (KCL – 770)) and a further 1,443 under consideration across six planning applications.

- There has been a discernible trend for the development of student accommodation towards transport hubs with exceptionally good connections principally into and across Central London.

Examples of this can be seen at Vauxhall and the Elephant & Castle in Zone 1 and further out of the capital in Stratford, Wembley, along with Tottenham Hale and Blackhorse Road (with their Victoria Line connections).

- While some of these developments are smaller than at Vauxhall, others are comparable or are larger. At the Elephant & Castle, a total of 2,082 beds have been developed, at Stratford 2,854; at Wembley there are 4,488 beds either in development or in use and there is the potential under the Wembley Growth Area plans for a further 1,241 beds to be delivered.
- **Planning Pipeline.** There is a general acceptance that the planning pipeline for student accommodation is relatively modest at present with a particular squeeze on developments of purpose-built student accommodation in the Central sub-region; latterly the emphasis has been on new development around transport hubs in Zones 2 and 3 (such as Stratford and Wembley). Relative to the numbers of students and the higher levels of growth in student numbers that the leading central London HEIs have experienced, the amount of student accommodation being developed is low and has been declining in recent years.
- The planning pipeline for student accommodation in London totals almost 12,500 bedspaces which is made up of 3,250 bedspaces which are currently under construction, 6,750 bedspaces in schemes which have been consented and 2,500 bedspaces in schemes which are at the application stage.

Status	Central	East	North	South	West	Total
Under Consideration	1,167	389			880	2,436
Consented	3,225	1,416	383	75	1,660	6,759
Under Construction	1,628	534			1,066	3,228
Total - Planning Pipeline	6,020	2,339	383	75	3,606	12,423

- In Lambeth there are a number of schemes in the planning pipeline. These are:
 - **Under Construction – 974 rooms** made up of:
 - Downing Students - Miles Street: Rudolf Place SW8 1RP – 841 rooms due to be completed September 2021.
 - Downing Students - Marinus Studios: 200A Lambeth Road, SE1 7LR – 133 rooms scheduled to be completed September 2020.
 - **Application Made – 272 rooms.** At the application stage is the proposed redevelopment of Lambeth College Vauxhall Centre on Belmore Street SW8 2JY which includes 272 rooms of student housing.

The Bondway Site

- The Bondway site is exceptionally well located with a PTAL rating of 6b which is the highest rating level. The site is immediately adjacent to the Vauxhall bus, tube and train interchange and offers fast public transport access into and across the Capital.
- The site is under 10 minutes journey by public transport from the KCL Waterloo and St Thomas' campuses and the UAL Chelsea College of Arts. It is also under 20 minutes journey to a number of major universities including the LSE, LSBU, Imperial College, the KCL Strand campus and UCL.

3. Background

- This report assesses the need for student accommodation at 35-43 Bondway Vauxhall SW8 where a 276 bedspace development is proposed.
- The report analyses the role that the proposed development can play in relation to the accommodation requirements of full-time students studying at Higher Education Institutions (HEIs) in Central London and in particular the Central sub-region. To provide a suitable context, these accommodation requirements are assessed in terms of the needs of students studying at campuses within a 30-minute journey time of the Bondway site.
- The report also looks at current and planned levels of provision of student accommodation by universities and private sector providers.
- The total number of students that has been used in this report varies from that used in the Economic Benefits report. The Economic Benefits report seeks to assess the overall contribution of students (full-time and part-time) in Higher Education whereas this Study of Need focuses on the accommodation needs of full-time students.
- A number of sources of data are widely used throughout this report and these include:
 - The Higher Education Statistics Authority (HESA)¹
 - The Universities & Colleges Admissions Service (UCAS)²
- The most accurate data on students in relation to where they are studying in terms of institutions and campuses, how those numbers have changed over time and the structure of the student body in terms of full-time/part-time, undergraduate and postgraduate and home/overseas comes from the HESA data and, where appropriate, this has been used.
- All other data sources are referenced as footnotes throughout the report.

¹ <https://www.hesa.ac.uk/data-and-analysis>

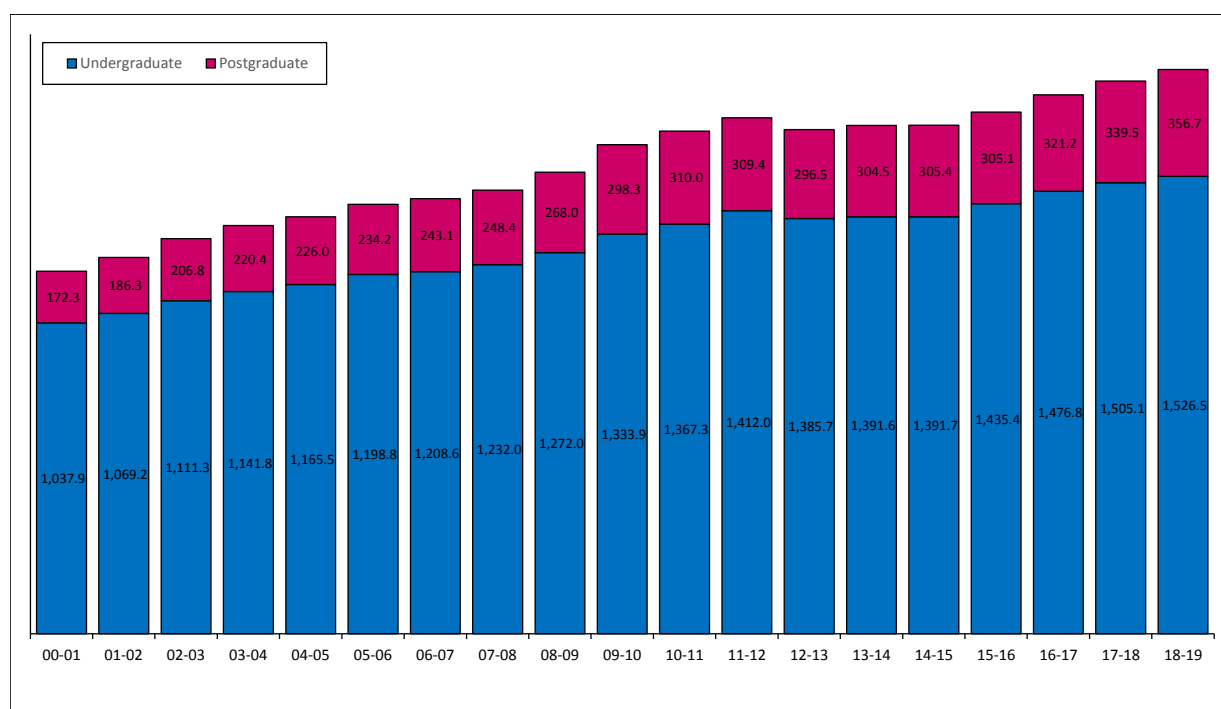
² <https://www.ucas.com/corporate/data-and-analysis>

4. Students in Full-time Higher Education

4.1 Students in Full-time Higher Education at UK HEIs

- Full-time student numbers in the United Kingdom have increased by more than 55% since the turn of the century rising from just over 1.2 million in 2000/01 to almost 1.9 million in 2018/19. Numbers of postgraduate students have risen at a faster rate than undergraduate students. Both undergraduate and postgraduate full-time student numbers are at their highest recorded levels and total full-time student numbers now exceed the previous peak that they reached in 2011/12 ahead of the introduction of the higher rate tuition fees; they are now (2018/19) 9.4% above that earlier peak.
- Full-time student numbers have also seen steady growth in the last few years with an average 2.7% rise over the last four years. Between 2017/18 and 2018/19, the most recent year, numbers rose by 2.1%.

Chart 1. Total numbers of full-time students at United Kingdom HEIs ('000s) (HESA)



Total Full-time Students – United Kingdom HEIs ('000s)

00-01	01-02	02-03	03-04	04-05	05-06	06-07	07-08	08-09	09-10	10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19
1,210.1	1,255.5	1,318.1	1,362.2	1,391.5	1,433.0	1,451.7	1,480.4	1,540.0	1,632.2	1,677.3	1,721.4	1,682.2	1,696.0	1,697.2	1,740.5	1,798.1	1,844.5	1,883.2

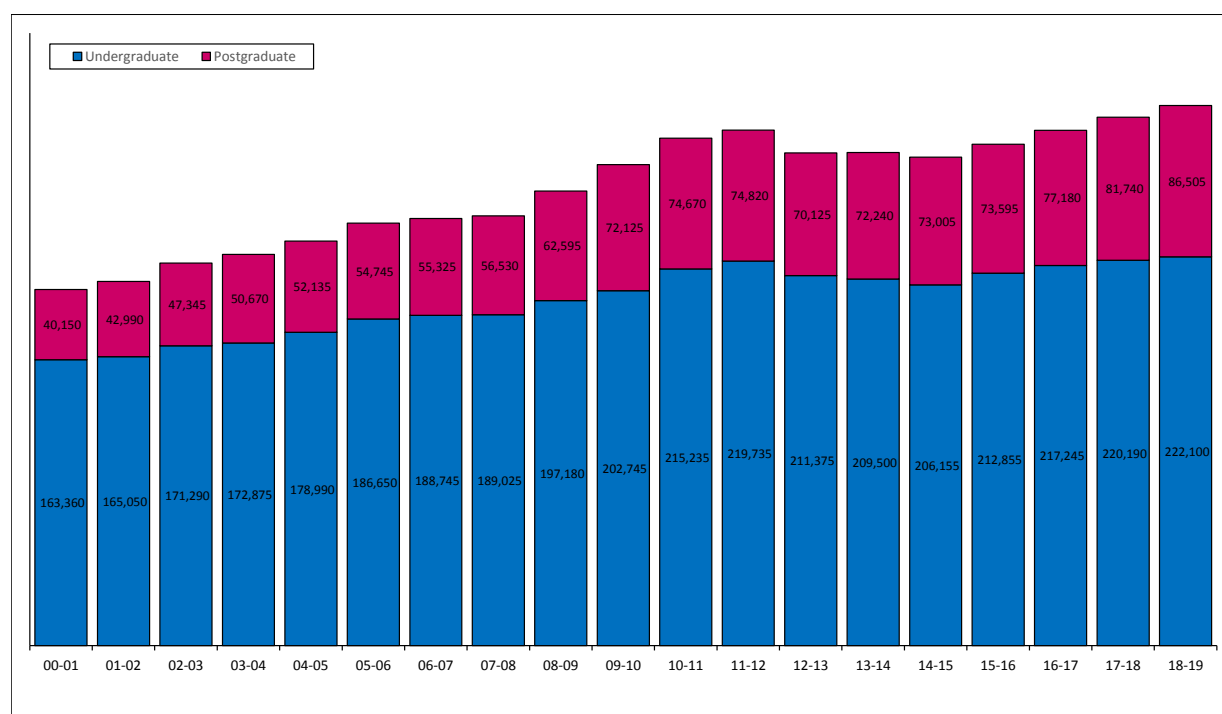
Year-on-year Change

	3.8%	5.0%	3.3%	2.1%	3.0%	1.3%	2.0%	4.0%	6.0%	2.8%	2.6%	-2.3%	0.8%	0.1%	2.6%	3.3%	2.6%	2.1%
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4.2. Students in Full-time Higher Education – London HEIs

- The change in the numbers of full-time students at Higher Education Institutions (HEIs) in London has largely mirrored the rest of the UK. The number of full-time students in London has increased significantly since the Millennium rising by 52% from 203,500 in 2000/01 to 308,605 in 2018/19. Postgraduate students have become more significant as a proportion of all full-time students rising from 19.7% in 2000/01 to 28.0% in 2018/19.
- The impact of the increase in tuition fees was more marked in London than across the rest of the UK with total numbers of full-time students falling for three successive years from 2012/13 to 2014/15 and declining by 5% over that period. By contrast, the growth in the past four years has been significant averaging 2.5% per year; there was growth of 2.2% in the most recent year 2017/18 to 2018/19. Total full-time student numbers now exceed the 2011/12 peak by 4.8%.

Chart 2. Total numbers of full-time students at London HEIs (HESA)



Total Full-time Students – London HEIs

00-01	01-02	02-03	03-04	04-05	05-06	06-07	07-08	08-09	09-10	10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19
203,510	208,040	218,635	223,545	231,125	241,395	244,070	245,555	259,775	274,870	289,905	294,555	281,500	281,740	279,160	286,450	294,425	301,930	308,605

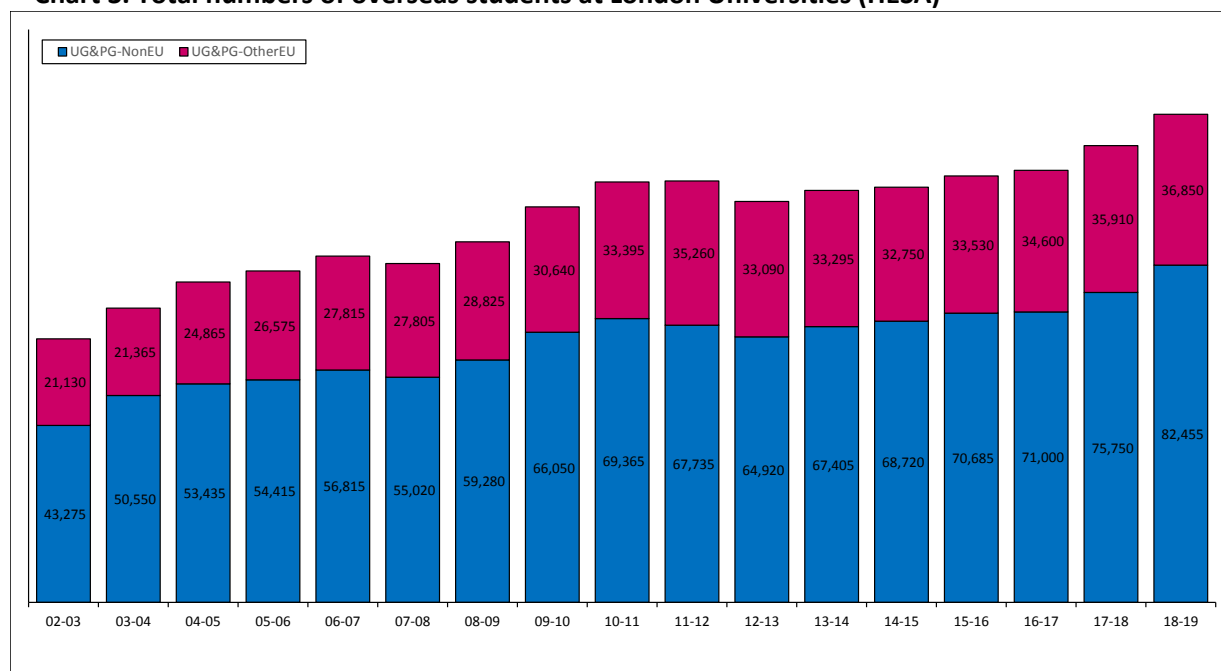
Year-on-year Change

	2.2%	5.1%	2.2%	3.4%	4.4%	1.1%	0.6%	5.8%	5.8%	5.5%	1.6%	-4.4%	0.1%	-0.9%	2.6%	2.8%	2.5%	2.2%
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4.3. Overseas Students

- Students from overseas are significantly more likely to make use of purpose-built accommodation than UK domiciled students. HESA data shows that two-fifths (40%) of non-UK domiciled full-time students live in purpose-built student accommodation compared to a quarter (25%) of those who are UK domiciled.
- The number of overseas students has increased significantly in recent years with the total studying at UK HEIs rising by 76% from 275,000 in 2002/03 to 485,625 in 2018/19. The level of increase in London has been higher than the national average with numbers rising by 85% from 64,500 in 2002/03 to 119,305 in 2018/19.

Chart 3. Total numbers of overseas students at London Universities (HESA)



Total Numbers of Overseas Students – London HEIs

02-03	03-04	04-05	05-06	06-07	07-08	08-09	09-10	10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19
64,405	71,915	78,300	80,990	84,630	82,825	88,105	96,690	102,760	102,995	98,010	100,700	101,470	104,215	105,600	111,660	119,305

Overseas Students as a proportion of all students in Higher Education in London

18.6%	20.3%	21.6%	21.5%	22.4%	22.9%	23.2%	24.7%	25.5%	25.6%	26.3%	27.5%	28.2%	28.8%	28.8%	30.1%	31.8%
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- Almost three-quarters (73%) of all overseas students in London are studying at HEIs in the Central sub-region where they make up almost two-fifths of the student body. Levels of overseas students make up a far lower proportion of the HE student body in the other sub-regions.

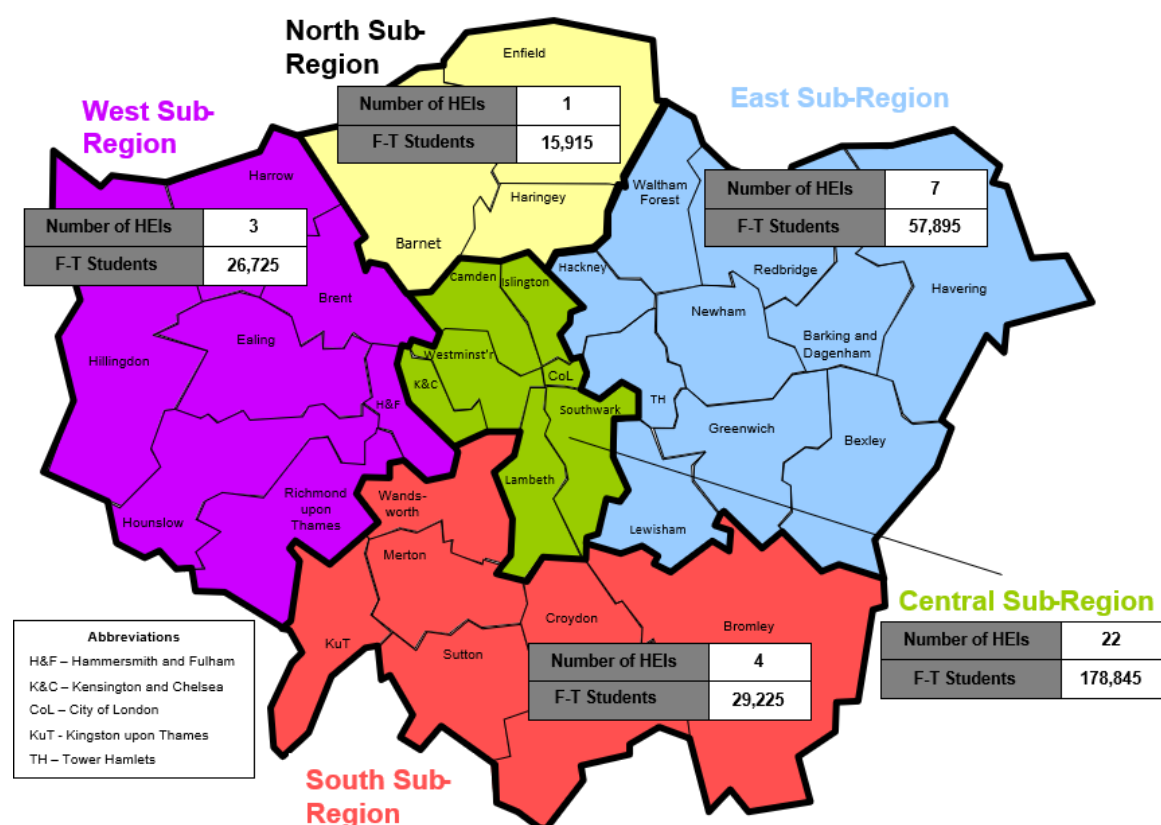
Table 1. Numbers of overseas students and presence in the HE student body in London by sub-region

	Central	East	North	South	West	Total
Total overseas students	86,685	16,595	4,580	4,935	6,510	119,305
Overseas students as % all HE students (F-T & P-T)	39.1%	24.5%	23.3%	14.3%	20.8%	31.8%

4.4. Students in Full-time Higher Education – London Sub-Regions

- The Greater London Authority (GLA) views London as being divided into a total of 5 sub-regions each covering a number of the London boroughs. London's Higher Education Institutions are focused in the Central sub-region which is home to 22 of the 38 London HEIs. These 22 HEIs cater for 58% of all students in full-time HE study in London.

Map 1. Overview of the relationship of the London boroughs to the sub-regions



- Growth in student numbers in the Central sub-region has been above the London average. This is significant as the Central sub-region is home to more than half of all full-time students in London. Full-time student numbers have grown at above average levels both in the period since the Millennium and over the past decade.

Table 2. Change over time in full-time student numbers by sub-region

	Central	East	North	South	West	Total-London
2000-01	113,735	40,115	17,250	19,805	12,605	203,510
2009-10	150,230	60,115	16,220	30,770	17,535	274,870
2018-19	178,845	57,895	15,915	29,225	26,725	308,605
% Change 00/01 to 18/19	57.2%	44.3%	-7.7%	47.6%	112.0%	51.6%
% Change 09/10 to 18/19	19.0%	-3.7%	-1.9%	-5.0%	52.4%	12.3%

4.5. Central sub-region by Institution

- The universities which make up the Central sub-region are shown below. As we have seen they make up 58% of full-time student numbers across London. Some of these have seen very high levels of growth in the past decade with six of the largest eight HEIs (more than 10,000 full-time students) growing by more than 20% since 2009/10.
- Of the HEIs with a campus presence near to the Bondway site (within a 2-mile radius), KCL has grown by almost half since 2009/10 and currently has more than 26,500 full-time students. UAL has more than 18,000 full-time students. Full-time student numbers at LSBU have declined in recent years but the university has more than 10,000 full-time students and has seen a small increase in the past year. The University College of Osteopathy has only recently gained university college status and has 250 full-time students. The RCA which has a campus at Battersea has seen full-time student numbers almost double to 2,300 in 2018/19.

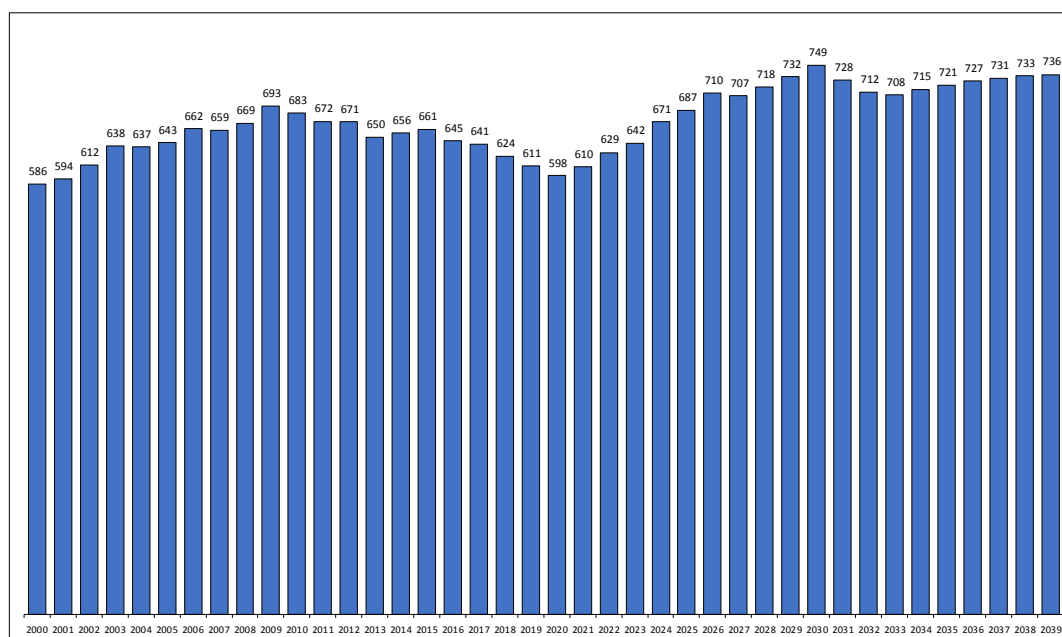
Table 3. Universities and HEIs in the Central sub-region: full-time student numbers (HEIs with campuses within a 2-mile radius of the Bondway site are shown in red)

Institution/University	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	% Change 09/10 to 18/19
University College London	19,560	20,690	21,550	22,345	24,380	28,145	29,710	30,640	32,700	34,005	73.8%
King's College London	17,980	18,135	19,215	19,495	19,855	20,775	22,615	24,090	25,570	26,635	48.1%
University of the Arts, London	15,120	15,425	15,715	15,875	16,110	16,505	17,215	17,335	18,185	18,395	21.7%
Imperial College of Science, Technology and Medicine	13,530	13,810	14,495	14,435	14,780	15,270	15,665	16,345	16,930	17,485	29.2%
City, University of London	12,375	12,725	14,360	12,120	14,150	14,560	15,585	15,925	16,265	16,495	33.3%
The University of Westminster	15,450	15,890	15,460	14,505	14,940	15,375	15,340	15,115	14,720	14,920	-3.4%
London School of Economics and Political Science	8,935	8,925	9,180	9,290	9,475	10,100	9,985	10,730	11,190	11,455	28.2%
London South Bank University	12,565	13,325	13,190	12,210	11,220	10,485	10,370	10,515	9,915	10,040	-20.1%
London Metropolitan University	15,980	15,875	17,315	14,275	12,955	10,830	9,865	9,250	7,865	7,375	-53.8%
SOAS University of London	4,580	4,570	4,820	4,795	4,750	4,900	4,865	5,200	5,135	4,590	0.2%
Birkbeck College	880	1,445	1,680	1,975	2,755	3,370	3,815	4,285	4,300	4,550	417.0%
Royal College of Art	1,155	1,190	1,270	1,400	1,590	1,355	1,500	1,750	2,040	2,300	99.1%
The Royal Veterinary College	1,720	1,700	1,730	1,765	1,750	1,795	1,920	2,045	2,180	2,225	29.4%
London Business School	1,115	1,190	1,195	1,380	1,415	1,320	1,495	1,565	1,490	1,625	45.7%
Conservatoire for Dance and Drama	1,130	1,140	1,210	1,225	1,270	1,245	1,275	1,240	1,275	1,340	18.6%
Guildhall School of Music and Drama	705	800	730	755	815	840	865	955	980	1,005	42.6%
The Royal Central School of Speech and Drama	820	855	925	940	910	915	955	1,030	1,025	995	21.3%
Royal Academy of Music	715	745	755	755	750	770	755	820	845	885	23.8%
Royal College of Music	650	700	700	700	755	780	760	765	800	775	19.2%
London School of Hygiene and Tropical Medicine	750	765	740	640	730	690	660	790	700	765	2.0%
Courtauld Institute of Art	380	405	420	420	440	450	495	485	495	490	28.9%
The University College of Osteopathy								255	250	255	
University of London (Institutes and activities)	265	265	285	150	145	145	120	130	120	240	-9.4%
Others (now closed)	3,870	3,530	3,705	2,480	2,750	410	290	225	100		
Total	150,230	154,100	160,645	153,930	158,690	161,030	166,120	171,485	175,075	178,845	19.0%

4.6. Demand for Higher Education

- The total numbers of young people (typically identified as those aged 18) who are available to enter Higher Education is a significant factor in terms of the demand for full-time study.
- The chart below shows that, in England, after the sharp rise in the numbers of 18-year olds that occurred following the Millennium, there has been a steady decline from 2009 onwards which is projected to end in the next couple of years.
- After that time the numbers will rise sharply to a level well above the previous peak of 2009 before settling down to a level which is consistently well above 700,000 18-year olds in the population. Overall this is likely to underpin strong demand for and growth in Higher Education.

Chart 4. Numbers of 18-year olds ('000s) in the population (England) – 2000 to 2039 (estimates to 2015; projections from 2016)³



³ Population estimates (2000-2015)

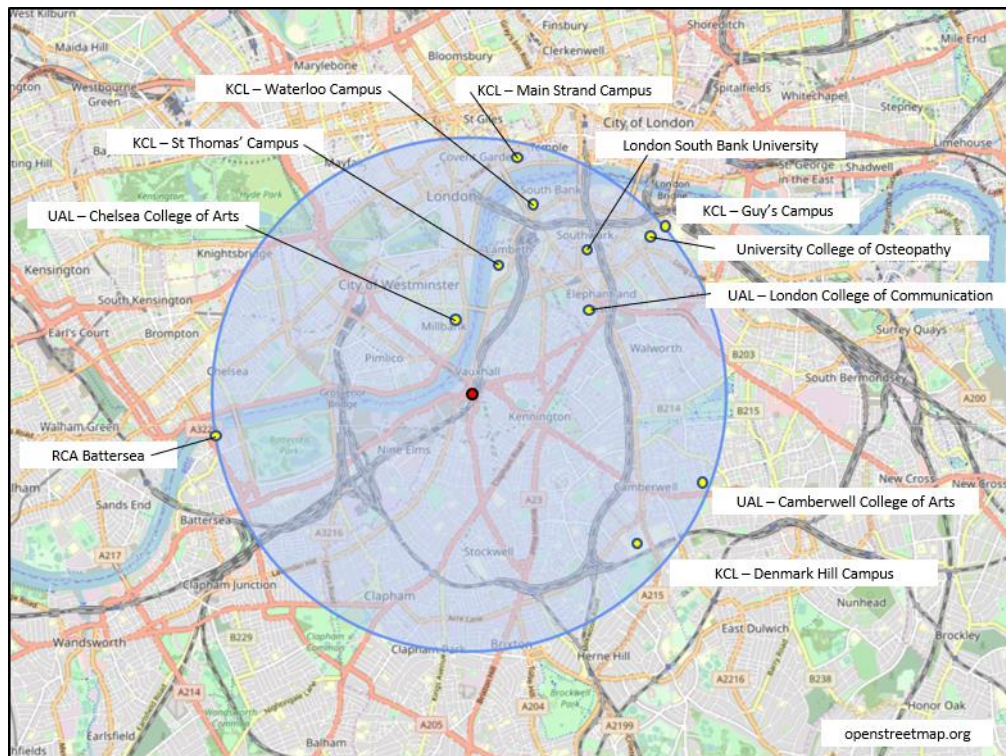
<https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=2002>; population projections (2016-2039) <https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=2006>

5. Higher Education Institutions

5.1. Nearby Higher Education Institutions

- There are a number of HEI campuses within a 2-mile radius of the Bondway site. One university, King's College London, has a presence in Lambeth with campuses at Waterloo and St Thomas'. A third campus at Denmark Hill is shared between Lambeth and Southwark.
- Four universities are based in or have a significant campus presence in Southwark:
 - London South Bank University (LSBU).
 - University of the Arts London (UAL): London College of Communications (Elephant & Castle) and Camberwell College of Arts.
 - King's College London (KCL): the Guy's and Denmark Hill campuses.
 - University College of Osteopathy (UCO).
 - RCA Battersea.
- Just across the river in the City of Westminster, the University of the Arts London has the Chelsea College of Arts which is located by Tate Britain in John Islip St.

Map 2. HEIs and HEI campuses within a 2-mile radius of the Bondway site⁴



⁴ <https://jopf.re/osmaps-radius/>

- The details of the HEIs which are based or have campuses close to the Bondway site are as follows:

Table 4. HEIs/universities with campuses within a 2-mile radius of the Bondway site

University (& website)	Administrative Base	Founded	Total Students (F-T&P-T) 18/19
King's College London (KCL) (www.kcl.ac.uk)	Strand WC2	1829	32,890
University of the Arts London (UAL) (http://www.arts.ac.uk)	High Holborn WC1	1986	19,095
London South Bank University (LSBU) (www.lsbu.ac.uk)	Borough Road, Elephant & Castle SE1	1892	17,120
Royal College of Arts (RCA) (https://www.rca.ac.uk)	Kensington Gore, South Kensington, SW7 2EU	1837	2,405
University College of Osteopathy (https://www.uco.ac.uk)	275 Borough High Street, SE1 1JE	1917	495

Below are the core details of each of these four HEIs:

1. King's College London (KCL) has a total of six campuses. St Thomas' and Waterloo campuses are based in Lambeth, the Denmark Hill campus is shared between Lambeth and Southwark and the Guy's campus is based in Southwark.

The Guy's campus on St Thomas St houses an estimated 750 students in its dental and medical teaching and research facilities in and around Guy's Hospital. Of these 550 are estimated to be studying on a full-time basis.

King's Faculty of Life Sciences & Medicine is home to some 5,000 students⁵ and is located across three campuses including the Guy's Hospital campus at London Bridge and the Denmark Hill campus.

2. University of the Arts London (UAL) is made up of six colleges of which three are based locally (Camberwell and Chelsea Colleges of Arts and the London College of Communication). Of its total of 19,095 students in 2018/19, 18,395 are studying full-time and 700 on a part-time basis. Just under a half of all UAL full-time students are studying at campuses within a 2-mile radius of the Bondway site.

Table 5. UAL – Structure of the Colleges

College	Location ((Principal) Borough & Area)	Total Students F-T 18/19 ⁶
Camberwell College of Arts (CCA)	Southwark – Peckham Rd/Wilson SE5	1,800
Central Saint Martins College of Arts and Design (CSM)	Camden – King's Cross N1 (and small campus in EC1)	4,400
Chelsea College of Art & Design	Westminster - John Islip Street SW1	1,400
London College of Communication (LCC)	Southwark – Elephant & Castle SE1	4,400
London College of Fashion (LCF)	Various across Hammersmith & Fulham, Westminster, Camden, Islington and Hackney	5,500
Wimbledon College of Art	Merton – sites in Wimbledon and Merton SW19	800

⁵ <https://www.kcl.ac.uk/lsm/about/index.aspx>

⁶ Number derived (and rounded to nearest hundred) from an apportionment of F-T numbers by UAL colleges based on HESA 18/19 data for total F-T students in HE at UAL (18,395) across student numbers by college as set out in the UAL 15/16 financial report https://www.arts.ac.uk/_data/assets/pdf_file/0020/12881/Financial-report-2016_Signed-final.pdf

- **London College of Communication (LCC)** has a total of 4,400 students who are studying full-time. The college is based at the Elephant & Castle and offers “undergraduate and postgraduate courses in subjects such as journalism, advertising, PR and publishing, photography, film, television and sound, graphic communication, illustration and visual communication, animation, games, design management, branded spaces and interactive and information design”⁷.
- **Camberwell College of the Arts (Camberwell CA)** has a total of c1,800 full-time students and is based on Peckham Road SE5 with a focus on qualifications in arts and design. The College works in a 3-college partnership with Chelsea College of Arts and Wimbledon College of Art to form CCW. The Foundation courses for all 3 CCW colleges are held at Wilson Rd SE5 which is to the west of the main Peckham Road site. This is the base for 600 full-time students.
- **Chelsea College of Arts (Chelsea CA)** is home to some 1,400 full-time students and is based opposite Tate Britain on Millbank. Chelsea offers courses in curating, fine art, graphic design communication, textile, product and interior design.

3. London South Bank University (LSBU) is based at the Elephant & Castle with its principal campus running along the spine of Keyworth St. In addition to the main campus, LSBU has a small campus in the London Borough of Havering at Harold Wood. Of the 17,125 students in Higher Education in 2018/19, 10,040 are studying full-time and 7,085 on a part-time basis.

4. Royal College of Arts (RCA). The RCA was founded in 1837 and is based at its main campus in South Kensington with additional campuses at White City and Battersea. The campus at Battersea was developed in the early part of the 21st Century and its existing six buildings will be augmented by a new flagship building for postgraduate students and entrepreneurs which is scheduled to open in autumn 2021⁸. In 2018/19 the RCA had a total of 2,405 students in Higher Education which was made up to 2,300 full-time and 105 part-time students.

5. University College of Osteopathy (UCO). Originally established in 1917 as the British School of Osteopathy, the UCO was granted degree awarding powers in October 2015. It was given University College status in September 2017. The only osteopathic institution in Europe granted the power to award its own degrees, UCO has an administrative base in Borough High Street and a clinic nearby on Southwark Bridge Road. In 2018/19 it had a total of 495 students of which 255 were studying on a full-time and 235 on a part-time basis.

⁷ <http://www.arts.ac.uk/lcc/about-lcc/>

⁸ <https://www.rca.ac.uk/more/building-battersea/>

5.2. The Strategies of Universities in the Surrounding Area

- The principal HEIs that sit within the vicinity of the Bondway site have strategies that envisage significant growth in the longer term.

a. King's College London

- THE World University Rankings 2020⁹ = 36=
- QS World University Rankings 2020¹⁰ = 33=

King's College London launched its King's Strategic Vision 2029¹¹ in January 2017. KCL envisages that there will be significant growth planned in the King's College Estate¹² through:

- The leasing of four refurbished Bush House buildings (initially for 50 years) including Bush House, Strand House and King House from September 2016 and adjacent Melbourne House from 2025.
- The development of the Mulberry site at Canada Water. This was consented to include 770 new student rooms, office space, affordable housing, retail units, a health care centre and landscaped public space. The development of the recently consented Canada Water site by British Land offers the opportunity to KCL to encompass the creation of a new campus for the college with new student accommodation combined with teaching and research facilities¹³.
- The Science Gallery London project (at the Guy's campus in Southwark).



KCL Guy's campus

- St Thomas' campus project involves the refurbishment and redevelopment of Block 9 and the Prideaux Building on Lambeth Palace Road as part of St Thomas' Hospital. Included in the project is a state of the art 300+ seater multi-purpose auditorium space and modern, flexible workspace for the benefit of health education and training.



St Thomas' Hospital (site of KCL St Thomas' campus)

⁹ <https://www.timeshighereducation.com/world-university-rankings/2020/world-ranking>

¹⁰ <https://www.topuniversities.com/qs-world-university-rankings>

¹¹ <https://www.kcl.ac.uk/aboutkings/strategy/Kings-strategic-vision-2029.pdf>

¹² <http://www.kcl.ac.uk/aboutkings/orgstructure/ps/estates/index.aspx>

¹³ <http://www.homesandproperty.co.uk/property-news/canada-water-2-billion-masterplan-set-to-create-major-new-urban-centre-in-docklands-a99791.html>

b. University of the Arts, London

- QS World University Rankings 2019 (Art & Design) = 2

UAL has already undergone significant change and growth with its consolidation of Central Saint Martins into the King's Cross site in 2011. The strategy for 2015 to 2022¹⁴ sets out further change with new and enhanced buildings for London College of Communication, London College of Fashion and Camberwell College of Arts.

Recent improvements to the Camberwell College of Arts have included:

- 6,470m² 6-storey academic extension building for Camberwell College of Art.
- A new part-5 and part-10 storey 264-bed Halls of Residence building incorporating a new Learning Zone.
- The reconfiguration and refurbishment of much of the 1960s' college building to create a new college main entrance from Peckham Road, extensive front entrance landscaping works and the creation of a new internal open courtyard, a new art gallery, student centre and workshops.



Reconfigured Peckham Rd frontage of Camberwell CA

As part of the redevelopment of the Elephant & Castle as a town centre, the London College of Communication will move across Newington Butts to a new purpose-built campus as part of the shopping centre redevelopment before its current site is redeveloped as a mix of commercial, residential and leisure/entertainment uses. In addition, the site will become a new centre for UAL's core university services relocating over 6,000m² of office space and over 500 jobs from other sites¹⁵.



London College of Communication

The London College of Fashion will move to the Olympic Park in Stratford by 2021.

¹⁴ <http://www.arts.ac.uk/media/arts/about-ual/strategy-and-governance/documents/university-strategy/UAL-Strategy-2015-22.pdf>

¹⁵ <http://www.elephantandcastletowncentre.co.uk/exhibition.htm>

c. London South Bank University

- THE World University Rankings 2020 = 1001+

London South Bank University (LSBU). The current focus of the LSBU estates strategy is on the St George's Quarter which seeks to redevelop the north-western corner of LSBU's Southwark campus (shown below).

The intention is to for the site to become a "new civic heart" for the Southwark Campus, which comprises:

- A central concourse which will provide an all-weather setting for 24/7 social interaction, study and events such as Welcome Week fairs, graduation ceremonies, food markets and performing arts.
- A new Learning Centre which will include a range of study spaces, a central point for student enquiries and an Automatic Book Storage and Retrieval System.
- A Performing Arts Centre, including a 200-seat theatre for teaching and public performances, a smaller 60-seat studio theatre and rehearsal space.
- Improvements to Keyworth St to create a more pedestrian friendly environment through planting, tactile paving, and creating places to sit and park bicycles.

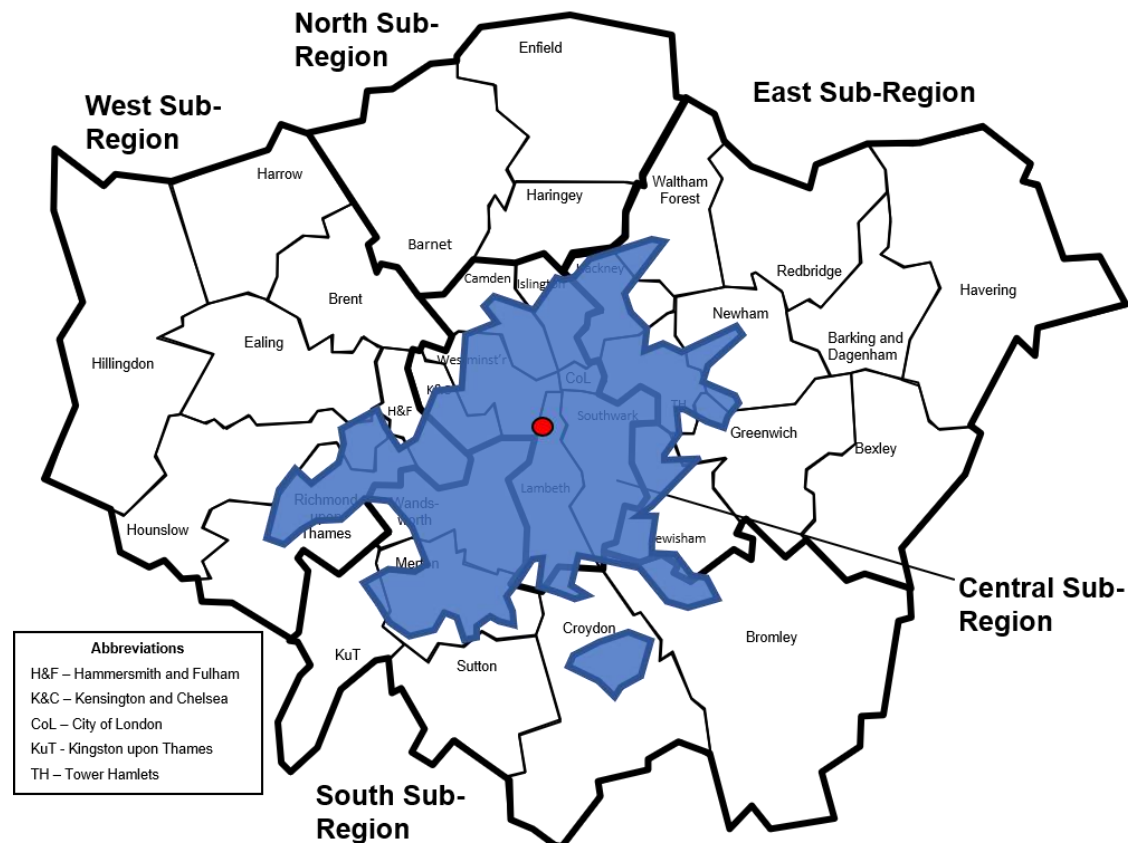


The St George's Quarter site at LSBU

5.3. Students at the Central sub-region

- The map below shows the overlap between the five London sub-regions and the map of journeys that can be made by public transport in 30 minutes and under from the Bondway site. The site is within the journey time of all of the institutions in the Central sub-region.
- As a result, the focus of this report will be the capacity of the Bondway site to meet the residence needs of students in the Central sub-region.

Map 3. Relationship of the London boroughs and the sub-regions to the Bondway site and journey times of up to 30 minutes by public transport (blue shaded area) - Mapnificent¹⁶



¹⁶ <https://www.mapnificent.net/london/>

6. The Provision of Student Accommodation

6.1. Student Accommodation: Development of Policy

6.1.1. London-wide

- The draft New London Plan is approaching adoption having undergone examination in public and following receipt of the inspector's report. Policy in relation to the development of purpose-built student accommodation is covered by Policy H17¹⁷ which notes that:
 - London's higher education institutions make a significant contribution to its economy and labour market. It is important that their attractiveness and potential growth are not compromised by inadequate provision for new student accommodation.
 - The overall strategic requirement for PBSA in London has been established through the work of the Mayor's Academic Forum, and a requirement for 3,500 PBSA bed spaces to be provided annually over the Plan period has been identified. Meeting the requirement for PBSA should not undermine policy to secure mixed and inclusive neighbourhoods.
 - To demonstrate there is a local need for a new PBSA development and ensure the accommodation will be supporting London's higher education institutions, the student accommodation must either be operated directly by a higher education institution or the development must have an undertaking in place from initial occupation, to provide housing for students at one or more specified higher education institutions, for as long as the development is used for student accommodation.
- The policy itself states that:
 - Boroughs should seek to ensure that local and strategic need for purpose-built student accommodation is addressed, provided that:
 - at the neighbourhood level, the development contributes to a mixed and inclusive neighbourhood
 - the use of the accommodation is secured for students
 - the accommodation is secured for occupation by members of one or more specified higher education institutions
 - at least 35 per cent of the accommodation is secured as affordable student accommodation as defined through the London Plan and associated guidance
 - the accommodation provides adequate functional living space and layout.
 - Boroughs, student accommodation providers and higher education institutions are encouraged to develop student accommodation in locations well-connected to local services by walking, cycling and public transport, but away from existing concentrations in central London as part of mixed-use regeneration and redevelopment schemes.

¹⁷ <https://www.london.gov.uk/what-we-do/planning/london-plan/new-london-plan/draft-new-london-plan/chapter-4-housing/policy-h17-purpose-built-student-accommodation>

6.1.2. Policy in Lambeth

- The emerging Lambeth Local Plan¹⁸ covers the provision at policy H7. It notes that:
 - that provision for specialist student accommodation is needed to support the growth of London's higher education institutions
 - To be sustainable, sites should be located close to the institution they are intended to serve (reachable within 30 minutes) or otherwise have good public transport accessibility (Level 4 or above).
- The policy states that proposals for student housing to be acceptable include that it:
 - would not lead to an over-concentration of similar uses which may be detrimental to residential amenity or the balance and mix of uses in the area or place undue pressure on local infrastructure
 - is located in an area with good public transport access, and easy access to local shops, work places, services and community facilities.
- The Vauxhall SPD identifies that given its proximity to a number of higher educational institutions in and around central London, Vauxhall is under particular pressure to meet the housing needs of students (Policy PN2).
- The update to the Lambeth Local Plan 2015 entitled Student Accommodation Assessment 2018/2019¹⁹ concludes that:
 - in 2018/19 there were 3,998 existing bed spaces in the borough within eleven student accommodation facilities.
 - The development pipeline remains strong, with three schemes under construction and set to provide 948 bed spaces.
 - Purpose-built student accommodation, both existing and proposed, is concentrated in the north of the borough...and that this is owing in part to the location of King's College London (KCL) at Waterloo and excellent public transport connections, particularly from Vauxhall and Waterloo.

¹⁸ <https://www.lambeth.gov.uk/sites/default/files/co-draft-revised-lambeth-local-plan-october-2018-final.pdf>

¹⁹ https://www.lambeth.gov.uk/sites/default/files/Student_Accommodation_2019.pdf

6.2. The Provision of Student Accommodation - London

- The provision of student accommodation is assessed in terms of the provision in London overall, the Central sub-region (all of whose HEIs can be reached in a 30-minute journey time from the Bondway site) and for HEIs within a 2-mile radius of the site.

6.2.1. The Structure of Student Accommodation in London

- In this section we will provide an overview of the structure of the market for student accommodation in London. The market for student accommodation in London differs from the United Kingdom by having a lower level of purpose-built student accommodation (PBSA) with some 20% of students being accommodated in PBSA in London compared to 28% across the whole of the UK.

Table 6. Structure of term-time accommodation for full-time students (HESA)

	UK	London
Institution maintained property	20%	13%
Private-sector halls	8%	7%
Parental/guardian home	20%	25%
Own residence	16%	22%
Other rented accommodation	32%	29%
Other	4%	5%
Total	100%	100%

- The sub-regions have different profiles in terms of the structure of their term-time accommodation. Those studying at the Central sub-region institutions (22 HEIs) are markedly less likely to be living in the parental home and more likely to living in private rented property. They are close to the London average in terms of their propensity to live in purpose-built student accommodation.

Table 7. Structure of term-time accommodation for full-time students by London sub-region

	Central	East	North	South	West	London Average
Institution maintained property	11%	12%	5%	14%	27%	13%
Private-sector halls	10%	6%	3%	2%	1%	7%
Parental/guardian home	19%	32%	41%	33%	32%	25%
Own residence	24%	23%	8%	15%	18%	22%
Other rented accommodation	32%	24%	33%	25%	18%	28%
Other	4%	3%	10%	11%	4%	5%
Total	100%	100%	100%	100%	100%	100%

6.2.2. The Bondway Site: Structure of Student Accommodation

a. Institution Managed Bedspaces – Central Sub-Region

- In general, levels of provision of Hall of Residence accommodation by London HEIs tend to be lower than the national average with the balance made up by higher than average levels of private sector provision and greater use of private rented accommodation.

Table 8. Overall level of provision of institutional managed bedspaces (only) for the Central sub-region HEIs (within a 30-minute journey time by public transport of the Bondway site)

HEI	F-T Students 2018-19	Institution Beds (17/18) ²⁰	Level of Provision
University College London	34,005	4,120	12%
King's College London	26,635	5,675	21%
University of the Arts, London	18,395	2,939	16%
Imperial College of Science, Technology and Medicine	17,485	2,818	16%
City, University of London	16,495	727	4%
The University of Westminster	14,920	1,527	10%
London School of Economics and Political Science	11,455	1,681	15%
London South Bank University	10,040	1,415	14%
London Metropolitan University	7,375	-	0%
SOAS University of London	4,590	930	20%
Birkbeck College	4,550	-	0%
Royal College of Art	2,300	-	0%
The Royal Veterinary College	2,225	344	15%
London Business School	1,625	-	0%
Conservatoire for Dance and Drama	1,340	-	0%
Guildhall School of Music and Drama	1,005	176	18%
The Royal Central School of Speech and Drama	995	-	0%
Royal Academy of Music	885	61	7%
Royal College of Music	775	400	52%
London School of Hygiene and Tropical Medicine	765	-	0%
Courtauld Institute of Art	490	32	7%
The University College of Osteopathy	255	-	0%
University of London (Institutes and activities)	240		
Total – Central sub-region	178,845	22,845	13%

²⁰ Unless stated – KCL, Imperial, UAL and LSBU are all 2019/20

b. The Structure of Student Accommodation – HEIs with campuses near to Bondway

- The structure of accommodation of the HEIs with campuses within a 2-mile radius of the Bondway site is shown below²¹. In the case of the LSBU return to HESA, the Own Residence category of accommodation appears to cover private rented accommodation as well.
- Once those who are living at home are removed as not being in need of accommodation, across the Central sub-region the 22 HEIs are able to accommodate around 14% of those students who are in need of accommodation in institution maintained accommodation. Amongst the HEIs which have campuses in the vicinity of the Bondway site, the level of provision by LSBU is slightly higher than the Central sub-region average with 14% of full-time LSBU students being accommodated in institution-managed accommodation. The levels for KCL and UAL are higher at 31% and 20% respectively.

Table 9. Approximate Structure of term-time accommodation for KCL, UAL and LSBU (HESA)

Type of Accommodation	Central	KCL	UAL	LSBU
Institution maintained property	11%	21%	16%	14%
Private-sector halls	10%	3%	10%	0%
Parental/guardian home	19%	19%	15%	5%
Own residence	24%	22%	30%	79%
Other rented accommodation	32%	29%	27%	1%
Other	4%	5%	2%	1%
Total	100%	100%	100%	100%
Level of provision of institution maintained accommodation amongst those in need of accommodation (ie minus those living at home)	14%	26%	19%	15%

²¹ The structure of accommodation for UCO is not known

6.3. HEIs and campuses in the vicinity of Bondway

As we have noted, there are four HEIs that are entirely located or which have campuses within a 2-mile radius of the Bondway site. The accommodation that they offer is summarised below.

a. King's College London (KCL)²²

- A significant proportion of the KCL accommodation is based within Lambeth where it currently offers 1,572 beds in a combination of institution managed accommodation (Stamford St Apartments (548 beds)) and nomination agreements (570 rooms in Atlas House with Downing Students and 454 rooms at Urbanest Vauxhall).

Table 10. KCL Halls of Residence & other PBSA where KCL has access to a proportion of the bedspaces through nomination agreements

Name of Hall	Borough	Bed-spaces	Location	Notes
Atlas House	Lambeth	570	52 South Lambeth Rd, SW8 1DN	
Urbanest Vauxhall	Lambeth	454	5 Miles Street, SW8 1RZ	
Stamford Street Apartments	Lambeth	548	127 Stamford Street SE1 9NQ	
Moonraker Point	Southwark	527	Pocock Street SE1 0FN	
Great Dover St Apartments	Southwark	769	Great Dover Street SE1 4XA	
Wolfson House	Southwark	247	Weston Street SE1 3RB	
Iris Brook	Southwark	77	Guy's Campus London Bridge SE1	
Orchard Lisle	Southwark	210	Guy's Campus London Bridge SE1	
Julian Markham House	Southwark	232	Walworth Road SE17 1JL	Agreement with UNITE
Champion Hill	Southwark	714	10 Champion Hill, SE5 8AN	
Intercollegiate Halls	Camden	400	Central London	
Angel Lane	Newham	759	Angel Ln, E15 1FF	Agreement with UNITE
Tower Hill	City of London	168	52 Minories, Tower Hill EC3N 1JA	Agreement with Urbanest
Total		5,675		

²² <https://www.kcl.ac.uk/study/accommodation/index.aspx>

b. University of Arts London (UAL)²³

- For the 2019/20 academic year, out of its total of 17,215 full-time students and across its London campuses, UAL offers a total of 2,939 beds in a combination of university managed accommodation and nomination agreements with private sector providers.
- UAL currently offers 270 rooms in Lambeth at the Glassyard Building in Stockwell (out of the 340 beds in the development). The details of the UAL Halls of Residence accommodation are outlined below.

Table 11. UAL Halls of Residence accommodation (institution managed and nomination agreements)

Hall	Borough	Beds	Location	Notes
Glassyard Building	Lambeth	270	7A Stockwell Green, SW9 9JF	
Brooke Hall	Southwark	104	17 Flodden Road, SE5 9LH	
Gardens House	Southwark	264	37-39 Peckham Rd, SE5 8UH	
Highline Building	Southwark	221	10 Steedman St SE17 3AF	Owned and managed by Fresh Student Living.
Portland House	Southwark	144	30-35 Peckham Rd, SE5 8FE	Opened autumn 2012 as Camberwell Campus. Managed by UAL.
Sketch House	Islington	475	36 Clifton Terrace, Finsbury Park N4 3TD	
Wigram House	Westminster	174	84-99 Thirleby Rd, SW1P 1HH	
Chapter Lewisham	Lewisham	308	46 Thurston Rd, SE13 7SD	
Cordwainers Court	Hackney	103	St Thomas Sq. Bethnal Green, E9 7PS	
Emily Bowes Court	Haringey	204	Hale Village N17 9FD	
Furzedown Student Village & Cedars Hall	Wandsworth	150	5 Spalding Road, SW17 9BB	
The Costume Store	Ealing	522	160 Victoria Road, W3 6UL	
Total		2,939		

²³ <http://www.arts.ac.uk/study-at-ual/accommodation/halls-of-residence/>

c. London South Bank University (LSBU)²⁴

- Out of its total of 10,370 full-time students, LSBU offers a total of 1,415 beds in university managed accommodation. This accommodation is provided in Halls of Residence within a maximum half mile radius of the main campus site.

Table 12. LSBU Halls of Residence – Detail

Name of Hall	Beds	Location	Notes
McLaren House	614	1 St George's Circus SE1 0AP	For first year undergraduate and returning students
Dante Road	422	2 Dante Place SE11 4RX	For first year undergraduate, returning and postgraduate students
David Bomberg House	296	282-302 Borough High Street SE1 1JJ	For postgraduates, returning students, some first year undergraduate
New Kent Road	83	83 New Kent Rd SE1 6RD	For first year students
Total	1,415		

d. Royal College of Arts.

- The RCA does not offer university managed accommodation but suggests that students use Unilodgers based on whether they are studying at the Kensington or Battersea campus²⁵.

e. University College of Osteopathy²⁶

- The University College of Osteopathy does not provide its own accommodation. Instead it offers students support with finding suitable accommodation through University of London Housing Services (ULHS)²⁷.

6.4. Private Sector Accommodation

- Those who study at the 22 HEIs within Central sub-region and wish to live in purpose-built student accommodation are able to choose from a number of private sector developments of student accommodation in London. This sector has grown rapidly in the past decade in response to a number of pressures which include:
 - The historic tendency of HEIs, as they expand, to focus on the academic offer and the quality of their research facilities rather than residential accommodation for their students.
 - The reduction in the ease with which houses can be converted into Houses in Multiple Occupation (HMOs) as Local Authorities make use of Article 4 directions to require planning permission to be gained before properties can be let as an HMO.
 - The premium pricing that can be obtained from specific groups of students such as those from overseas who have been keen to live close to Central London (where most of the initial private sector accommodation was focused).
- We will focus our study of private sector student accommodation on the boroughs in the Central sub-region as being capable of usage by students living at the Bondway site. The full details of the larger private sector developments (>200 bedspaces) that are in use in each of these boroughs appears in Appendix 1.

²⁴ <http://www.lsbu.ac.uk/student-life/accommodation/residences>

²⁵ <https://www.unilodgers.com/uk/london/student-accommodation/royal-college-of-art/>

²⁶ <https://www.uco.ac.uk/life-uco/location-and-accommodation/accommodation>

²⁷ <http://www.housing.lon.ac.uk/>

6.4.1. Central sub-region

- Overall in the Central sub-region there are more than 41,000 PBSA bedspaces that are in use. This figure is made up of some 23,000 institution managed beds and 18,500 private sector beds. More than half of total beds are based in Camden (12,728 - 31%) and Islington (10,012 - 24%). Far smaller are numbers in Southwark (6,904 – 17%), Westminster (3,857 – 9%), Kensington & Chelsea (3,881 – 9%) and Lambeth (3,774 – 9%).

Table 13. PSBA provision borough – Central sub-region

Borough	Camden	City of London	Islington	K&C	Lambeth	Southwark	Westminster	Total
Institution	7,637	344	2,507	2,927	969	5,352	3,475	23,211
Private Sector	5,091	176	7,505	954	2,805	1,552	382	18,395
Total	12,728	520	10,012	3,881	3,774	6,904	3,857	41,606

6.5. Existing PBSA in Lambeth.

- In addition to the 3,774 beds in Lambeth that are currently in use, a further 974 beds are under construction. Once completed they would take the Lambeth total to 4,748 beds.


Table 14. PBSA Halls of Residence in Lambeth – In Use (>50 rooms)



Name of Hall	Beds	Location	Notes
1. University Managed			
Stamford St Apartments	550	127 Stamford St, SE1 9NQ	KCL managed accommodation
2. Nomination Agreement²⁸			
Xenia Hall	149	2 Secker Street SE1 8UF	Chapter One on behalf of Imperial College
Urbanest Westminster Bridge	1,093	199-203 Westminster Bridge Rd, SE1 7FR	Nomination 820 beds (inc. 423 LSE and 323 direct let)
Urbanest Vauxhall	454	5 Miles Street, Vauxhall SW8 1RZ	Urbanest – nomination agreement in part with KCL
Glassyard Building	340	7A Stockwell Green, SW9 9JF	Fresh Student Living – UAL accommodation: 270 of 340 beds
The Altas	570	52 South Lambeth Rd, Vauxhall, SW8 1DN	KCL accommodation
3. Private sector PBSA			
Spring Mews	378	10 Tinworth St, SE11 5EL	Fresh Student Living
Halsmere Studios	79	Henry Wood Ho, 10 Halsmere Rd SE5 9LN	Collegiate AC
Academic House	69	128 Herne Hill SE24 9QH	CRM Students
The Hub	92	21-25 South Lambeth Road SW8 1SU	Host Students
4. Under Construction			
Miles Street	841	Units 1 To 18 Rudolf Place SW8 1RP	Downing Students – estimated completion September 2021
Marinus Studios	133	200A Lambeth Rd, SE1 7LR	Downing Students – estimated completion September 2020
5. Application			
Lambeth College Vauxhall Centre	272	Belmore Street, SW8 2JY	South Bank Colleges; part of Lambeth College redevelopment.

²⁸ (wholly or in part)

6.6. PBSA in Vauxhall

- Upon the completion of Miles Street in September 2021, there will be five significant developments of PBSA in the Vauxhall area totalling 2,335 beds.
- Fuller details of the developments in Vauxhall are as follows:

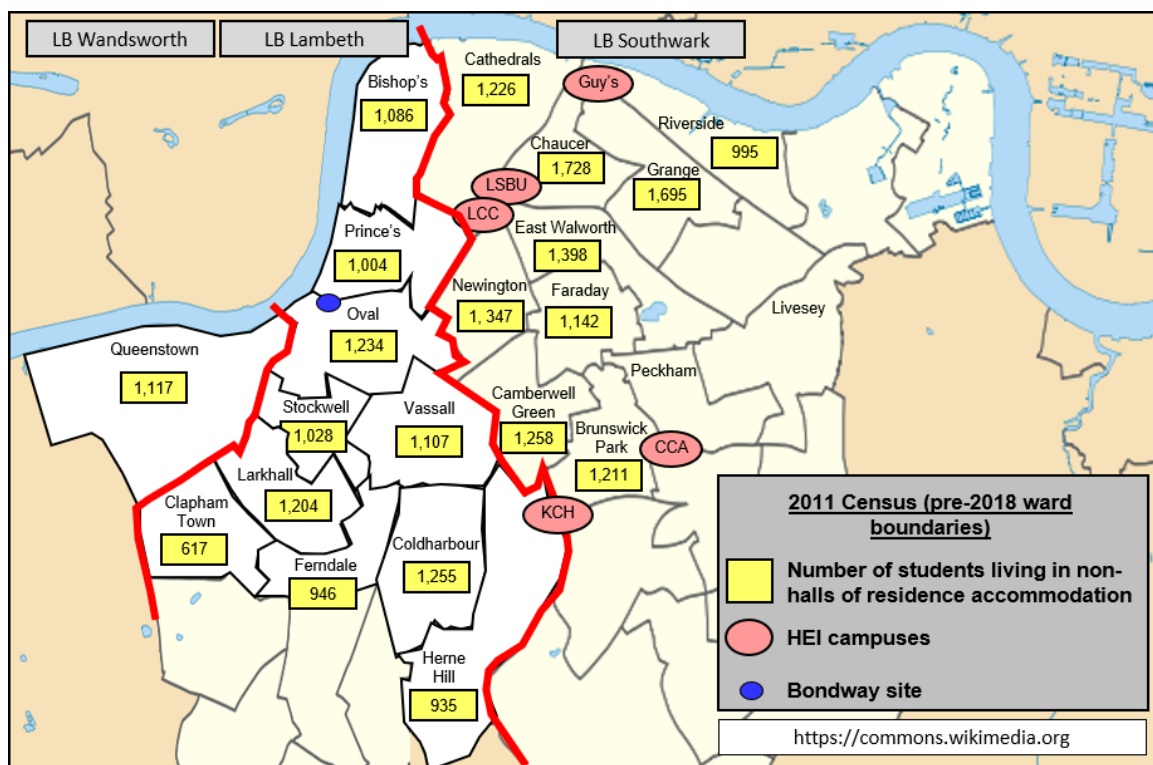
Development	
<p>Spring Mews. Fresh Student Living – opened September 2014. Address: 10 Tinworth Street, SE11 5EL. 378 beds.</p>	
<p>The Hub. Host Students. Address: 21-25 South Lambeth Rd SW8 1SU. 92 beds.</p>	
<p>Urbanest Vauxhall. Opened September 2018. In part nomination agreement with KCL Address: 5 Miles Street, Vauxhall SW8 1RZ. 454 beds.</p>	

Development	
<p>The Atlas. Opened September 2018. Downing Students - nomination agreement with KCL. Address: 52 South Lambeth Rd, SW8 1DN. 570 beds.</p>	
<p>Miles Street. Downing Students. Estimated completion September 2021. Address: Units 1-18 Rudolf Place SW8 1RP. 841 Beds.</p>	

6.7. Students Living in the Local Area

- Although some caution is now needed using 2011 Census data, it is clear that once the numbers of students living in Halls of Residence accommodation are stripped out from total numbers (see Appendix 3 for full details) there is a large residual population of full-time students aged 18+ living in the northern parts of Wandsworth, Lambeth and Southwark.
- At the time of the 2011 Census, all of the Lambeth wards north of Clapham saw in excess of 1,000 full-time students aged 18+ as part of the usual resident population. In Lambeth, pressure is particularly significant in Oval ward where more than 1,200 residents are full-time students. While the development of PBSA in recent years in Vauxhall may have helped improve this position, the Bondway site development offers further opportunities to reduce the local housing pressure by freeing up properties that are currently occupied by students and returning that to occupation by local residents.

Map 4. Ward map showing numbers of students not living in halls of residence accommodation (Census 2011; pre-2018 boundary changes wards)



6.8. Student accommodation in other hubs.

- In the past decade, significant volumes of student accommodation have been developed which are sometimes further away from university campuses but which are located in areas with exceptionally good public transport links. Three of these highly connected locations are outlined below:

Table 15. Student accommodation development in public transport hubs

Location	Total Student Accommodation Beds	Details
Elephant & Castle	2,082 beds	<ul style="list-style-type: none"> • Out of the total of 1,415 LSBU managed beds, 1,119 are located in and around the Elephant & Castle (McLaren House (614), Dante Road (422) and New Kent Rd (83). • There are 221 UAL beds in the Highline building and 232 KCL beds at the UNITE Julian Markham House • A further 510 beds are located in 2 private sector developments – Dashwood Studios (232 beds) and Portchester House (278 beds).
Stratford	2,854 beds	<ul style="list-style-type: none"> • There are five significant PBSA developments in use in and around Stratford Town Centre and the Olympic Park – Duncan House (Fresh Student Living 511 beds), Mansion View (Mansion Student 138 beds), Three Mills West (Alumno Group 445 beds) and two UNITE developments (Angel Lane 759 beds and Stratford ONE 1,001 beds).
Wembley	4,488 beds either in use or under construction and a maximum of 1,241 further beds have been consented (but are subject to a potential cap).	<ul style="list-style-type: none"> • The development of student accommodation in the Wembley is guided by a requirement that a maximum of 20% of the projected increase in the Wembley Growth Area population should be student bedrooms. • There are currently in use 3,606 beds in 6 developments. Two of these, totalling 1,359 beds, are subject to nomination agreements - Raffles House (total 660 beds of which 481 rooms are taken by the University of Westminster) and UNITE Olympic Way (699 rooms of University of Middlesex accommodation). There are a further 2,247 beds in four private sector developments – Apex House (Scape 560 beds), Felda House Wembley (CRM 450 beds), Grand Felda House (CRM 802 beds) and Victoria Hall Wembley (435 beds). • Two further developments totalling 882 rooms are under construction - Kelaty House (599 beds) and Parkwood House (283 rooms). • A further two developments have been consented but are potentially subject to restrictions based on the total amount of residential spaces created in the overall Wembley redevelopment - Quintain Masterplan up to 691 beds and Quintain South-West Lands up to 550 rooms.

7. Purpose-Built Student Accommodation: Planning Pipeline

- The planning pipeline for student accommodation in London totals almost 12,500 bedspaces which is made up of 3,250 bedspaces which are currently under construction, 6,750 bedspaces in schemes which have been consented and 2,500 bedspaces in schemes which are at the application stage.
- In terms of the sub-regions, 6,000 of the 12,500 bedspaces in the planning pipeline are being developed in the Central sub-region (of these 1,650 are currently under construction).

Table 16. Planning pipeline by sub-region and status of development

Status	Central	East	North	South	West	Total
Under Consideration	1,167	389			880	2,436
Consented	3,225	1,416	383	75	1,660	6,759
Under Construction	1,628	534			1,066	3,228
Total - Planning Pipeline	6,020	2,339	383	75	3,606	12,423

- The principal developments in the Central sub-region are detailed in Appendix 2. In Lambeth the pipeline consists of:
 - **Under Construction – 974 rooms** made up of:
 - Downing Student Miles Street: Rudolf Place London SW8 1RP – 841 rooms due to be completed September 2021.
 - Downing Students Marinus Studios: 200A Lambeth Road, Lambeth, SE1 7LR – 133 rooms scheduled to complete September 2020.
 - **Application Made – 272 rooms.** At the application stage is the proposed redevelopment of Lambeth College Vauxhall Centre on Belmore Street SW8 2JY which includes 272 rooms of student housing.

8. The Bondway Site

8.1. Public Transport Accessibility

- Access to public transport at a given location in London is measured on a 1 to 6 scale by its Public Transport Accessibility Level (PTAL). The TfL Webcat map below shows that the location of the Bondway site has a PTAL rating of 6b which is the highest rating level. The site is immediately adjacent to the Vauxhall bus, tube and train interchange and offers exceptional public transport access.

Map 5. PTAL Map of Area Surrounding the Bondway site (SW8 1SJ) (TfL Webcat)²⁹



²⁹ <https://tfl.gov.uk/info-for/urban-planning-and-construction/planning-with-webcat/webcat?intcmp=25932>

8.2. Journey Times – Bicycle and Public Transport

- The journey times to HEIs by bicycle and public transport from Bondway are shown below. The site is under 10 minutes journey by public transport from the KCL Waterloo and St Thomas' campuses and the UAL Chelsea College of Arts. It is also 20 minutes or less journey to a number of other major Central sub-region universities including the LSE, LSBU, Imperial College and KCL Strand campus, UCL and RCA Battersea.

Table 17. Journey times (in minutes) by bicycle and public transport to HEIs and campuses from the Bondway site (SW8 1SJ)

Institution/Campus	Address & Postcode	Journey Time - Bicycle ³⁰	Journey Time – Public Transport ³¹
KCL – Waterloo Campus	Stamford St, SE1 9NH	16	7
UAL - Chelsea CA	16 John Islip St, SW1P 4JU	7	7
KCL – St Thomas' Campus	163 Lambeth Palace Rd, SE1 7EH	9	9
University of Westminster	115 New Cavendish St W1W 6UW	34	12
UAL - LCC	Elephant and Castle, SE1 6SB	14	12
KCL – Strand	Strand WC2R 2LS	27	13
LSE	Houghton Street WC2A 2AE	23	14
LSBU	103 Borough Rd SE1 0AA	13	14
University College London	Gower St WC1E 6BT	33	16
University College of Osteopathy	275 Borough High St, SE1 1JE	17	16
KCL – Guy's Campus	Great Maze Pond, SE1 9RT	20	17
KCL – Denmark Hill	De Crespigny Park, SE5 8AF	20	18
Imperial College - South Kensington	South Kensington, SW7 2AZ	34	19
RCA Battersea	Riverside, 1 Hester Rd, SW11 4AN	21	20
UAL - Camberwell CA	Peckham Road SE5 8UF	22	21
City University	Northampton Sq EC1V 0HB	34	25

³⁰ <https://www.cyclestreets.net/>

³¹ Times taken from Mapnificent as being more realistic of actual public transport journey times than the TfL Journey Planner which tends to be conservative (especially in relation to the walked parts of the journey).

9. Notice

- Please note that we would advise that this report is for general informative purposes only. It does not constitute a formal valuation, appraisal or recommendation. No responsibility can be accepted to any 3rd party for the whole or any part of its contents.
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- Whilst we have made every effort to ensure that the data contained in this report is correct, no responsibility can be taken for omissions or erroneous data provided by a 3rd party or information being unavailable and inaccessible during the research period.
- As our findings are based on the assumptions given above they should be regarded as valid for a limited period of time and subject to periodic review.

Appendices

Appendix 1. Large private sector developments of PBSA in the Central sub-region that are currently in use (>200 bedspaces).

Institution/Organisation/ Hall Name	Borough	Bed- spaces	Location	Developer/Agent
Urbanest King's Cross	Camden	657	Canal Reach, King's Cross N1C 4BD	Urbanest
Unite-St Pancras Way	Camden	572	11-13 St Pancras Way	Unite
Unite - Woburn Place	Camden	457	19-29 Woburn Place, WC1H 0AQ	Unite
Stay Club Kentish Town	Camden	439	65- 69 Holmes Road, NW5 3AN	Stay Club
Nido - West Hampstead	Camden	347	Blackburn Road, NW6 1RZ	The Nido Collection
Urbanest St Pancras	Camden	305	103B Camley Street, Kings Cross, N1C 4BN	Urbanest
The Stay Club @ Camden	Camden	260	34 Chalk Farm Road, Camden, NW1 8AJ	Hallmark Estates
Helen Graham House	Camden	247	57 Great Russell St, WC1B 3BA	Viridian Housing
Unite - Beaumont Court	Camden	232	1-45 College Grove, London NW1 0RW	Unite
Depot Point	Camden	226	15-27 Britannia Street, WC1X 9AH	Student Housing Company
Chapter King's Cross	Islington	1,045	200 Pentonville Road London N1 9JP	Chapter Living
Unite - Stapleton House	Islington	856	263-289 Holloway Road, N7 8FB	Unite
iQ City in London	Islington	805	11 Bastwick St, London, EC1V 3PE	iQ Student Housing
Tufnell House	Islington	690	Huddleston Road, London N7 0EG	Prodigy Living/iQ Students
Chapter Highbury	Islington	566	309 Holloway Road London N7 9DS	Chapter Living
iQ Highbury	Islington	400	201 Isledon Road N7 7JR	iQ Student Housing
The Arcade	Islington	392	385-401 Holloway Road, N7 0RY	CRM Students
Chapter Islington	Islington	323	32-34 Market Road London N7 9AW	Chapter Living
Liberty Court	Islington	291	16 Briset Street, London EC1M 5HD	Liberty Living plc
Unite - East Central House	Islington	247	131 Lever St, EC1V 3RH	Unite
Therese House	Islington	247	29 Glasshouse Yard, EC1A 4JN	Touchstone Living
Liberty Hall	Islington	240	29 Graham Street, London N1 8LA	Liberty Living plc
Chapter Highbury II	Islington	212	295 Holloway Road, N7 8HS	Chapter London/Greystar
Unite - Piccadilly Court	Islington	209	457-463 Caledonian Rd, N7 9BJ	Unite
Lightfoot Hall	K&C	215	Manresa Road, Chelsea SW3 6NA	Homes for Students Ltd
Urbanest Westminster Bridge	Lambeth	1,093	199-203 Westminster Br Rd, SE1 7FR	Urbanest
The Atlas	Lambeth	570	52 South Lambeth Rd, Vauxhall, SW8 1DN	Downing Students
Urbanest Vauxhall	Lambeth	454	5 Miles Street, Vauxhall SW8 1RZ	Urbanest
Spring Mews	Lambeth	378	10 Tinworth Street, Vauxhall, SE11 5EL	Fresh Student Living
Portchester House	Southwark	278	50 New Kent Road, SE1 6SH	Get Living London/CRM Students
iQ Paris Gardens	Southwark	253	6 Paris Garden SE1 8ND	iQ Student Housing
Dashwood Studios	Southwark	232	120-138 Walworth Road, SE17 1JL	Campus Living Villages
Chapter South Bank	Southwark	230	17 Great Suffolk Street, SE1 0NS	Chapter Living

Appendix 2. Major developments (more than 100 bedspaces) in the Central sub-region planning pipeline by borough and status of development.

Name of Development	Borough	Bed-spaces	Status	Address	Developer
Urbanest 35 Vine St	City	654	Construction	Emperor Ho 35 Vine St, EC3N 2PX	Urbanest UK Ltd
Marinus Studios	Lambeth	133	Construction	200A Lambeth Road, SE1 7LR	Downing Students
Miles Street	Lambeth	841	Construction	Units 1 To 18 Rudolf Place SW8 1RP	Downing Students
	Camden	60	Consented	Midland Crescent Finchley Road London NW3 6NA	
	Camden	5	Consented	Ruspini House	Royal Masonic Trust For Girls and Boys
Ramsay Hall	Camden	7	Consented	Ramsay Hall (Rome Block), 20 Maple Street W1T 5HB	UCL
	Camden	22	Consented	Connaught Hall, 36-45 Tavistock Square	University of London
	Camden	37	Consented	109 Camden Road NW1 9HZ	University College London (Main Office)
	Camden	52	Consented	45 Sidmouth Street WC1H 8JB	Passion Property Group
	Camden	86	Consented	Wesley Court, 4 Wild Court	Kensington School of Business
RADA	Camden	60	Consented	16-18 Chenies Street WC1E 7PA	RADA
	Islington	450	Consented	Arsenal Student Housing - Land & Arches 1-21 & R/O, 45 Hornsey Road, Holloway Road (252)	Ashburton Trading Limited
	Kensington & Chelsea	177	Consented	253-259 Kensal Road and 5 and 6 Middle Row, LONDON, W10	Kensal Developments LLP
Capital House	Southwark	905	Consented	Capital House 42-46 Weston Street SE1 3QD	Greystar
	Southwark	123	Consented	Surrey Quays SE16 7LL	CGNU Life Assurance Ltd
Canada Water Masterplan	Southwark	300	Consented	KCL Canada Water Campus/British Land	Canada Water Masterplan
	Southwark	770	Consented	Mulberry Business Park SE16	King's College London
Bankside House (Extension)	Southwark	104	Consented	Bankside House, Sumner Street SE1	LSE
309-311 Harrow Road	Westminster	34	Consented	309-311 Harrow Road W9 3RG	YPP Lettings Ltd
	Westminster	33	Consented	46 Princes Gardens SW7 1AB	Imperial College London
Nido - West Hampstead	Camden	41	Under consideration	Blackburn Road, NW6 1RZ	Nido Student Housing
Land fronting Stephenson Way	Camden	78	Under consideration	To the rear of 222 Euston Road adjacent to 210 Euston Rd NW1 2DA	Churchgate Ltd
Lambeth College Vauxhall Centre	Lambeth	272	Under consideration	Belmore Street London SW8 2JY	South Bank Colleges
272 St James's Rd	Southwark	250	Under consideration	272 St James's Road, SE1 5JX	272 St James's Rd
iQ Paris Gardens	Southwark	54	Under consideration	6 Paris Garden & 20-21 Hatfields London SE1 8DJ	IQSA Paris Gardens
11-13 Spa Road	Southwark	186	Under consideration	11-13 SPA ROAD, SE16 3RB	Student Urban Living Bermondsey Limited
77-89 Alscot Road	Southwark	143	Under consideration	77-89 Alscot Road London SE1 3AW	Alumno Group
Land to the rear of 89-111 Borough High Street, SE1	Southwark	417	Under consideration	Land to the rear of 89-111 Borough High Street, SE1	Land to the rear of 89- 111 Borough High Street, SE1
Eagle Wharf	Southwark	393	Under consideration	90-96 Peckham Hill Street SE15 5JT	UAL and Hollybrook Ltd

Appendix 3. Census 2011 - numbers of full-time students (aged 18+) by ward – total number of students, number living in Halls of Residence accommodation and resulting number not living in halls of residence accommodation.

Ward	A. Total F-T students aged 18 to 74 (KS501EW)	B. Halls of Residence (Census - Other establishment: Education) (QS421EW)	C. Resulting net total F-T students aged 18+ (ie not living in HoRs) (A-B)
1. LB Wandsworth			
Queenstown	1,117	-	1,117
2. LB Lambeth			
Bishop's	1,513	427	1,086
Clapham Town	617	-	617
Coldharbour	1,255	-	1,255
Ferndale	946	-	946
Herne Hill	935	-	935
Larkhall	1,204	-	1,204
Oval	1,234	-	1,234
Prince's	1,004	-	1,004
Stockwell	1,028	-	1,028
Vassall	1,134	27	1,107
3. LB Southwark			
Brunswick Park	1,321	110	1,211
Camberwell Green	1,322	64	1,258
Cathedrals	3,028	1,802	1,226
Chaucer	2,686	958	1,728
East Walworth	1,398	-	1,398
Faraday	1,142	-	1,142
Grange	1,888	193	1,695
Newington	1,481	134	1,347
Riverside	1,162	167	995