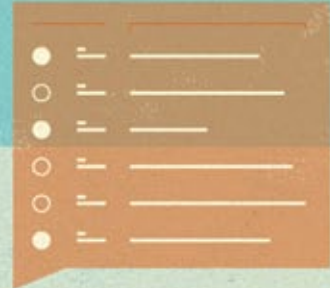




2012/2013

Accommodation Costs Survey



Contents

Acknowledgements	1
Foreword	2
Executive summary	4
Recommendations	7
The cost of purpose-built accommodation	10
Provision and rent: variation across regions and institutions	22
Purpose-built provision and the private rented sector: comparisons by city	29
The changing shape of purpose-built student accommodation	34
Marketisation, affordability and the uncertain future	45
Data tables	49
About the survey	59
Endnotes	67

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Joanna Goodman
National Union of Students

Victoria Loveseed
Unipol Student Homes

Foreword

The NUS/Unipol Accommodation Costs Survey is a well-established study which spans almost 30 years and tracks changes in the market over time. It is widely recognised sector-leading research and provides a credible and complete view of the purpose-built student accommodation market.

In carrying on the comparability of information across surveys, the current research round maintains the data set which was established in the early 1980s and which encompasses the rents charged and the type of student accommodation offered within purpose-built provision operated by both education institutions and the private sector.

This survey is the most comprehensive yet and takes in 363,366 bed spaces, estimated at 81 per cent of the entire market. The data acquired in the survey is also the most comprehensive, giving a much clearer picture of the type of accommodation provided, its cost and its amenity level. Our thanks go to the many people working in the field who took a considerable amount of time to give us access to all this information. Their increased involvement reflects the thirst for information about how the student accommodation sector is progressing and developing.

This survey is being launched at an extraordinary time in higher education. The new funding regime fully transfers the cost of higher education delivery from the public purse to students and as a result the tuition fee level borne by the student has in many cases tripled. These new arrangements have just been implemented and the opening year has seen a reduction in student admissions by 56,600 (a 12 per cent reduction). Most of these students would have required accommodation and so the purpose-built sector (which tends to house mostly first-year students) has seen a significant fall in demand. This, in turn, has resulted in many institutions carrying empty rooms. Private providers have responded by discounting rooms – placing the private

sector in the most direct competition with education institutions ever seen.

The uncertainties of the current year, and what will happen in the future, have thrown a number of emergent trends over the last three years into sharp focus.

The lower-cost rooms available from education institutions have got much more expensive (rising 23 per cent since 2009-10). This means that some institutions no longer have any low-cost rooms for their poorer students. Very few students – or their families – would think that accommodation to see them through their higher education careers was cheap. The average cost of a basic room with an average contract length is now £3,980 a year and very few first-year students can expect to pay less than this. It also reminds us that it is not only the private sector which drives rent levels up, because rent rises for the lower-priced rooms since the last survey have been led by education institutions themselves.

At the other end of the scale, upmarket private sector studio flats continue to be developed. An average weekly rent (in London) of £232 and an average contract length of 47 weeks produce an annual rent of £10,904.

With around 1.7 million students needing accommodation there will always be a wide variety of products demanded by students with very differing means. It would, however, be foolish to place too much emphasis on the very well-off and to pretend that this in any way reflects an average student, their requirements and what they can afford.

Over the last three years the private sector has seen very considerable growth. Just under 10 years ago (in 2003) private providers represented only 4 per cent of the stock. This has now risen to 39 per cent, and 79 per cent of the 18,607 bed spaces coming on line for 2013 will be private sector-provided. The role of

the education institution as the main provider of first-year accommodation is under challenge. With student numbers static at best and with growth in supply, that challenge can only increase.

In this 'race to quality' it is important to draw breath and remind ourselves what student accommodation is really about. It is an important part of the educational process, building independence and providing an essential foundation for the challenging learning process that most students experience. It is an opportunity to meet new people, often in an international environment and to engage in cross-cultural enrichment and exchange of ideas in a way that is, perhaps, unique to higher education.

Good quality accommodation is vital: few students can reach their maximum academic potential in poor quality housing. Vital also are affordability and access so that students can live with friends in the sociable environment that characterises our institutions of higher education. The balance on cost and types of accommodation must be correct – for both private and institutional suppliers and the higher education process itself.

This report, and its recommendations, give readers the facts about purpose-built student accommodation, free from spin and speculation: this is what is out there. It is, we believe, an important part of the continuing debate about how the right accommodation can best be embedded in the higher education process and how suppliers can make their best contribution to the student experience.

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Executive summary

The profile of the sector

Purpose-built accommodation is divided into three broad categories – accommodation provided by:

- the institutions themselves in their own buildings
- others but via an arrangement made through an institution, referred to in this report as a 'nomination agreement'
- an external private supplier directly

Weekly rent

Overall, average weekly rent has gone up by 25 per cent in the three years since the last survey. In 2009-10 it stood at £98.99 and by 2012-13 it has reached £123.96. This steep rise was heavily loaded into the first two of these years (23 per cent). The increase exceeds inflation substantially and the economic impact on students is compounded by no parallel rises in levels of available financial support.

There is still significant variance between weekly rents charged by different provider types – for institutions £118.49, for nomination agreements £119.83 and for private providers operating outside institutional links £140.07.

In the final reckoning these figures may be significantly altered by a trend seen this autumn which although not new is unprecedented in scale. In the context of a significant fall in student intakes nationally the resulting empty rooms previously filled by Year 1 students have been the subject of heavy discounting among private providers. Institutions, also with empty beds, have not shown or perhaps felt able to show this responsiveness.

The resilience which has characterised the market in recent times, allowing providers to hike rents above inflation and still to let to capacity, is vulnerable if

student intakes fail to recover in the medium term. It is likely that all providers will need to be competitive in an intensifying market.

One of the most significant findings in the latest survey is the rapid rent increases which institutions have been imposing for provision traditionally located at the cheaper end of the spectrum – non-ensuite self-catered single rooms. This type of accommodation as provided by education institutions was £6.73 a week cheaper than the private sector in 2009-10, but by 2011-12 the differential had shrunk to only £1.23 a week. Rooms let through nomination arrangements were actually three pence a week cheaper than those rented from an institution.

A similar trend is evident for ensuite self-catered rooms, the most common provision type. The cost differential between education institutions and private providers has narrowed. In 2009-10 renting from an education institution was on average £2.86 a week cheaper than renting from a private provider. By 2011-12, however, education institutions were actually £0.48 a week more expensive than private providers and rooms let through nomination arrangements were actually cheaper than rooms offered directly by the education institution (by £2.82 a week).

Contract length

For 2012-13 the average contract length for institutions is 41 weeks (39.6 weeks in 2009-10). This compares to an average contract length of 44 weeks for privately provided accommodation (44.6 weeks in 2009-10) and 45 weeks for provision made available through nomination agreements (42.9 weeks in 2009-10).

Additional costs

Since the last survey booking fees have been going down as providers recognise increasingly that they should cover just what they are supposed to – the additional administration needed to process a booking.

Overall, 43 per cent of accommodation providers charge an administration fee to cover cancellation (effectively a booking fee), compared to 28 per cent in 2009-10. The figure for private providers is 65 per cent and for institutions 37 per cent.

For institutional providers, the average booking fee was £108.86. This was down from £150.59 in 2009-10. For private providers the average fee was £131.25, down from £135.28 in 2009-10.

Deposits are increasingly used and are getting higher. Sixty-five per cent of providers require a deposit or substantial upfront payment: 73 per cent of private providers have such stipulations compared with 63 per cent of institutions. The average deposit required by a private provider is £300 (up from £238 in 2009-10) and by an education institution £288 (up from £198 in 2009-10).

There is little difference between private providers and institutions in the time they typically take to return deposits to students – the average time for institutions is four weeks and the average for private providers three. This compares favourably with the position reported in the last survey, when some institutions took as long as 16 weeks.

Regional variation on costs

Predictably, London remains the area with the most expensive rents, averaging £157.48 per week, up 26 per cent from £125.34 in 2009-10. This rise in the average rent is largely attributable to the increasing number of studio flats in London.

The east of England has the second highest overall average weekly rent at £134.18. At £265.00 per week,

the East of England also has the highest non-London rent, charged by an education institution.

The cheapest region to live in remains Northern Ireland at £83.01. Although this was also the case in 2009-10 when the average rent was £64.17, average rents have seen a 29 per cent rise over the last three years.

The type of accommodation provided

The proportion of ensuite bed spaces has continued its long upward trajectory, up from 48 per cent in 2009-10 to 55 per cent of the market currently.

Conversely, the number of bed spaces in catered accommodation continues to decline, from 17 per cent in 2009-10 to 15 per cent in 2012-13. Within this downward trend, however, it is worth noting that some institutions have invested in new-build catered accommodation, supporting the view that it does occupy an enduring place in the culture and tradition of some universities.

In spite of their high advertising profile, studio flats account for a small proportion of the sector. That said, it has gone up from 2 per cent to 4.5 per cent of the stock since the last survey.

Shared non-ensuite cluster flats have historically been at the more affordable end of providers' portfolios. On top of the rent rises reported earlier in this summary, this provision type has undergone contraction since the last survey as a proportion of the market. In 2009-10 it formed 36 per cent of all bed spaces. In 2012-13 the figure has fallen back to 32 per cent. Although education institutions still have 82,300 non-ensuite bed spaces and private providers 15,962, these are not evenly spread through all accommodation markets and in some areas the diminishing availability of this accommodation type is threatening to compromise adequate provision of a reasonable quality of lower-cost shared accommodation. With rents up and provision down, it could now be argued that the historical association between affordability and non-ensuite cluster flats has ended.

Twin rooms are appearing on some institutional agendas. The 2009-10 survey revealed no twin rooms but in 2012-13 there are 6,656, amounting to just under 2 per cent of bed spaces supplied. These are to be found almost entirely in institutional accommodation.

Since the last survey, the proportion of institutions providing some level of accommodation adapted for disabled students has remained static at 95 per cent. In contrast, the proportion for private providers has fallen from 86.2 per cent to 73 per cent. The extent of the drop in the private sector is pronounced enough to reaffirm the conclusion that commercial operators do not see a sufficiently worthwhile rental yield in this provision type.

For families, 34 per cent of institutions provide for students with dependent children aged under 18 and 21 per cent provide for those with dependants over the age of 18. These account for 3 per cent and 4.8 per cent of bed spaces respectively. Accommodation for families is much less common in the private sector, where it represents just 0.3 per cent of provision. This is a marked reduction on the position in 2009-10 when 17 per cent of private providers had family accommodation of some form.

The overall conclusion on accommodation types is that variety is being maintained, albeit within the slow increase of ensuite cluster flats and the development of more expensive studio flats. There is some evidence that in commissioning new-builds, both institutions and developers are recognising the need to provide a variety of types of accommodation, not just the standard issue ensuite self-catering cluster flat.

Providers

The current survey round points up a dramatic swing in the balance of supply between institutional and private providers: in 2012-13 the private sector now forms 39 per cent of supply (up from 22 per cent three years ago). This surge has been led by a new species of provider and investor and these operators are often geared to do business successfully without reliance on institutional partnership arrangements.

Growth in the supply of student accommodation is continuing, despite the decline in the number of undergraduates for the 2012-13 intake. In 2013-14 22,729 additional purpose-built bed spaces are due to come on line while only 4,122 have been earmarked for decommissioning. This represents a net increase of 18,607. Private providers account for 79 per cent of these new bed spaces; 58 per cent will be directly let into the market; and 21 per cent will be covered by nomination agreements.

As student accommodation provision grows and intakes contract (at least for 2012-13), returning students must be seen as an increasingly important part of the market and are likely to become a focus for particularly intense competition between and within sub-sectors of providers.

Recommendations

Strategic development and affordability – institutions and partnership working

1. Institutions should develop their own portfolio, either directly or in partnership, with a clear commitment to the student experience. A balanced pricing strategy, predicated on the importance of choice and real affordability at the lower end of the range, should take primacy over any commercial return flowing from accommodation. The institution should also ensure that a 'whole portfolio' strategy is in place that discourages a piecemeal building-by-building approach outside of that strategic framework.
2. Pastoral care and student welfare are essential components of the student care package provided by education institutions. There should be a clear description of the care and support package offered to students at the time of letting. This should be included within the institution's accommodation information along with the usual details about cost and amenity levels.
3. The availability of affordable accommodation is crucial in ensuring that there is fair access and that students from lower income backgrounds are not excluded from a residential experience of higher education. Institutions must take this into account as a key component of their widening participation strategies and ensure that key decision-making processes about accommodation provision include those responsible for widening participation and properly take account of their views. Institutions should also adopt, within their policy framework, the definition of affordable housing used by the Housing Voice. This is: "comfortable, secure homes in sound condition that are available to rent or buy without leaving households unable to afford their other basic needs (eg food, clothing, heating, transport and social life)." An approach grounded in this definition is more likely to be effective than basing affordability on comparisons with average rent levels.
4. In the previous survey in 2009-10 it was recommended that 25 per cent of all rents charged

by (or through) the institution should fall within the bottom quartile of the institution's rent structure. Significant progress has been made on maintaining range, but as this survey makes clear, lower cost rooms have seen their rent increase dramatically since that time. As a result the affordability of what are now lower cost rents once again presents a problem. Increasing range is clearly not enough and institutions should work towards having an agreed policy statement (involving all stakeholders) that seeks to set out a policy on affordable accommodation that is relevant to the particular circumstances and location of their institution.

Affordability and cost – private providers

5. This survey has illustrated the very substantial shift towards private sector developments over the last three years. Many of these developments are geared to the top of the rental structure, particularly in London. Planners should consider, within planning consent, the importance of some affordable rooms being made available within new buildings just as they require provision to be made for students who have specific requirements.

Transparency

6. There is still room for improvement in ensuring that the costs of student accommodation are clearly spelt out to students in advance of them making decisions about what to rent. This is particularly important as the prevalence of online booking and allocation systems increases. Where add-on services are provided, they should be clearly explained, free of ambiguity. These additions should also be based on clear demand and evidence of value for money rather than being based on assumptions of student expectations.
7. Administration or 'booking' fees should only cover the cost of actual work undertaken. Institutions should consider why they charge additional fees to students for this particular piece of administration and not for most other administrative support which they give to students during their study lifecycle.

8. Where it is felt that upfront charges must be levied, these should be kept to a minimum and, where applicable, should not be required in advance of students receiving their first loan instalment.

Accreditation and standards

9. Accreditation is an important tool to ensure standards are complied with and improve. The contents and purpose of the UUK and ANUK/Unipol Codes of Practice should be familiar to all staff working within accommodation, and a summary of their audits should be made publicly available.
10. Institutions entering partnership arrangements of any sort should work only with those who are members of the ANUK/Unipol National Code.
11. Local accreditation schemes are important. Institutions and students' unions should ensure they both play a full part in implementing, managing and publicising accreditation. This activity should be a key component of institutional house hunting strategies for students, particularly returners.

Sustainability

12. In the previous report it was recommended that all students should have access to the information contained in Energy Performance Certificates, even though this is not a legal requirement for students renting individual rooms in a complex. Since that recommendation was made the situation has got worse – and has got worse in spite of many institutions and providers giving sustainability much greater emphasis through a variety of energy saving measures. The EPC should be readily accessible at the time of letting, regardless of whether this is a legal requirement.
13. Providers should give each student in their accommodation an estimate of the cost of the utilities they pay, where this is included in the rent. It is essential that students, most of whom are favourably disposed to energy saving measures, should have a clear idea of the cost of utilities that

they are paying and that the notion of energy being 'free' is counteracted.

14. Initiatives to promote a reduction in energy usage should be implemented and the financial benefits of any behaviour change should be returned to the student as a rebate or be used to calculate a reduction in rent prices for the next cohort of students.

Consultation and student engagement

15. In the rent setting process and in planning for future developments, providers of accommodation should make sure they properly consult and actively engage student representatives. Working with students' unions and residents groups on their expectations of accommodation and cost is an important way of ensuring that provision is appropriate and suitable to meet students' needs.
16. Student accommodation satisfaction surveys should be undertaken regularly: each year if possible and not less than every two years. Ideally, these should be carried out at a timely point in the accommodation cycle (often towards the year-end) which provides a good lead-in time for follow-on actions to be taken. The results should be made publicly available in summary form along the lines of a 'you said...we did' format.
17. Equality impact assessments should be carried out for all new developments of accommodation to ensure adequate provision for all students, particularly those who have a disability and those with caring responsibilities.

The cost of purpose-built accommodation

Rising prices

For the purposes of this survey purpose-built provision divides into three broad categories – accommodation provided by:

- the institutions themselves in their own buildings
- others but via an arrangement made through an institution, referred to in this report as a 'nomination agreement'
- an external private supplier directly¹

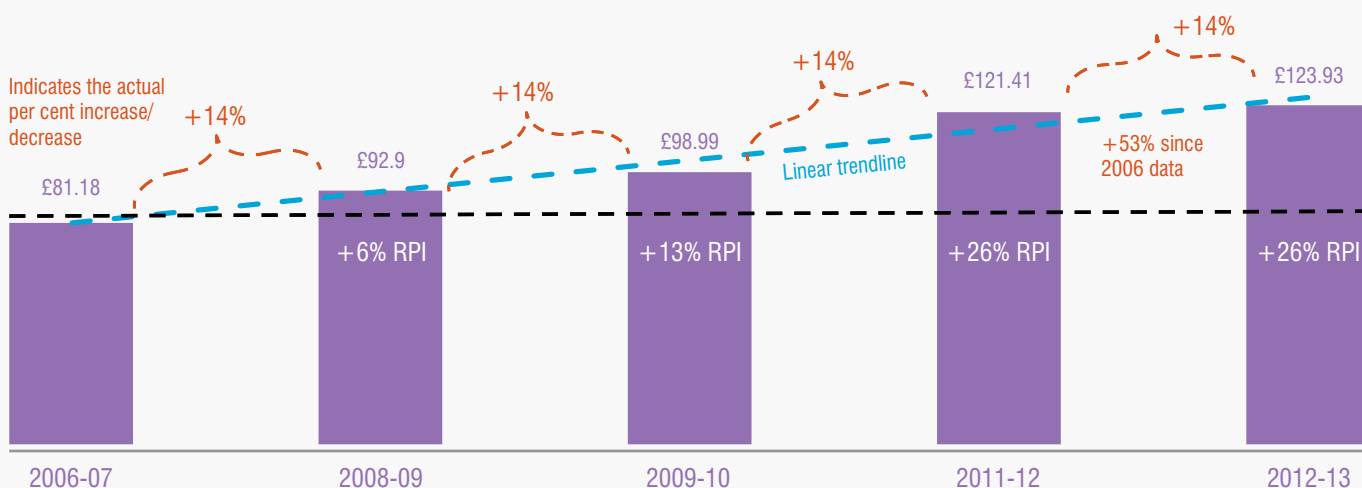
In the previous survey the average weekly rent was £98.99 for 2009-10. Two years later in 2011-12 average rents had risen by 23 per cent to £121.47. Rental growth then slowed in 2012-13 with the average rent settling at £123.96, just 2 per cent up.

There continues to be a significant difference between average weekly rents charged by different provider types. Institutional accommodation represents the lowest average cost at £118.49 a week. This compares with £119.83 for accommodation offered under nomination agreements and £140.07 for privately provided accommodation let into the market outside any institutional link.

Responses to the survey for 2012-13 were based on rent levels as advertised over the summer. The increase in rents for privately provided accommodation may be lower than indicated as a result of cost adjustments and discounting in the direct let market, following an increase in voids as student intakes fell.

As Figure 1 shows, the overall rent levels in purpose-built accommodation have continued to rise above the rate of inflation. The cost to the student has gone up by 25 per cent over the three-year period since 2009-10. This increase is significant in itself, but its effect is compounded by the lack of any parallel increase in levels of student support.

Figure 1: Average rent increase from 2006-13 for all accommodation providers



The recent slow-down in rental increases may be a reflection of both anxiety about student number contraction and heightened competition from private providers at a time when oversupply of bed spaces is now a more common problem than shortages.

Up to now the purpose-built sector has been able to impose higher-than-inflation rent increases and to continue letting to capacity. This resilience is, however, likely to give way to an increasingly strong renters' market if:

- student intakes fail to recover ground in the medium term
- heightened cost sensitivity linked to the new student funding system means that students increasingly expect more for less.

If it takes hold, this conjunction of trends will present a significant challenge to providers, used to favourable market conditions which have prevailed since they entered the sector.

In the future it is likely that private providers will need to become more competitive on pricing in an increasingly competitive market. The early signs of them recognising this emerging market imperative have been evident in some rent discounting in autumn 2012. For several years the rate both of rent increases and of the drive towards luxury provision in the sector has exerted increasing tension on affordability and sustainability.

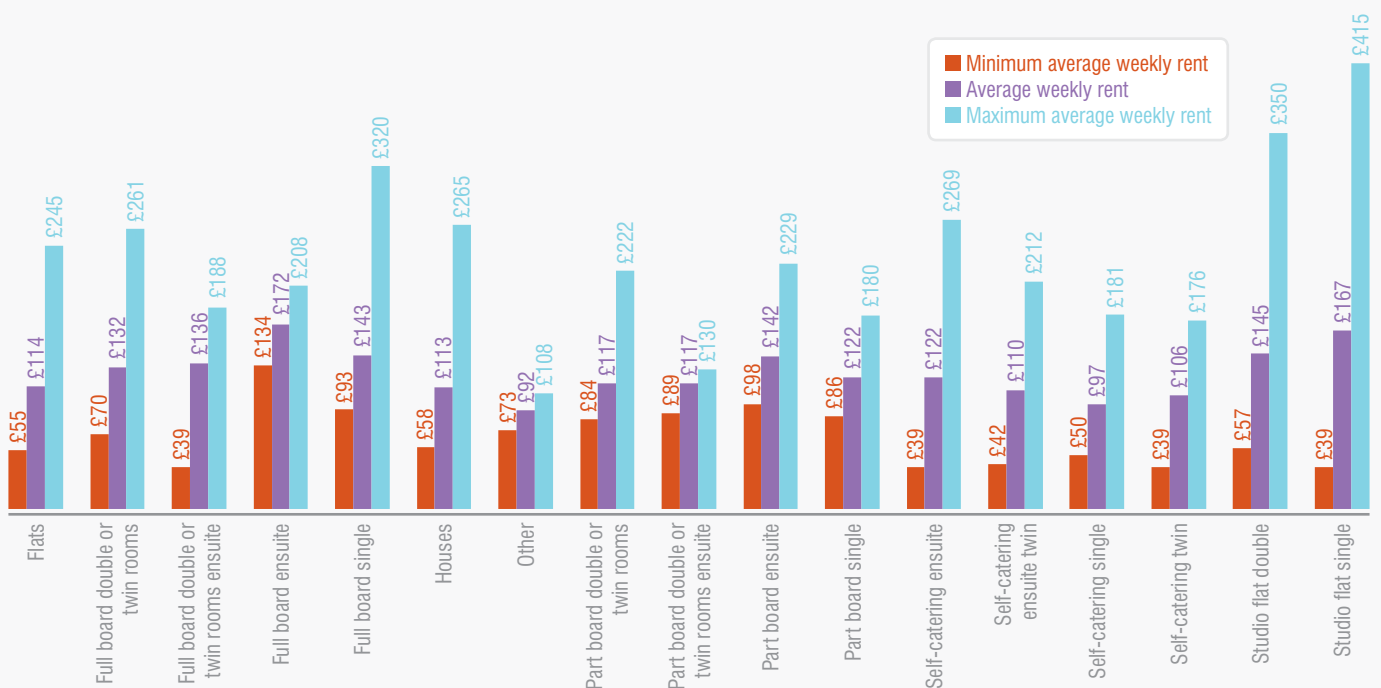
The 37 per cent increase in weekly rents between 2009-10 and 2012-13 contributes to a total increase of 77 per cent between 2006-07 and 2012-13.

Accommodation managers in institutions are set to feel the pinch more and more, as the tension increases between the imperative to fill bed spaces and expectations to generate a surplus from letting in order to cross-subsidise other internal services. Like the private providers, they now have only a very limited amount of headroom for any future rises and some rents are likely to fall as competition between providers increases.

Weekly rents – differentiation according to room type

Figure 2 shows the minimum, average and maximum rental prices for all room types. Those at the bottom are likely to be older stock. The top of the market is occupied by studio flats, particularly those in private developments in London. It is this higher cost provision that is driving the average cost of privately provided accommodation ever higher.

Figure 2: 2012-13 average weekly rent ranges (minimum, maximum and overall average), including all providers



At an average weekly rent of £97.24 non-ensuite self-catering single rooms remain, on average, the cheapest type of accommodation on offer.

Rent for these lowest cost rooms has risen substantially and it is education institutions that have been driving these increases. In 2009-10 a non-ensuite self-catered single room was £78.84 a week but by 2011-12 the cost was 23 per cent higher at £97.08. Rents in these lower cost rooms under nomination arrangements rose less, from £84.02 to £97.05 (an increase of 16 per cent). At the same time private providers' lower cost rooms rose from £85.57 in 2009-10 to £98.31 (a rise of 15 per cent). This type of accommodation as provided by education institutions was £6.73 a week cheaper than the private sector in 2009-10, but by 2011-12 the differential had shrunk to only £1.23 a week. Rooms let through nomination arrangements were actually three pence a week cheaper than those rented from an institution.

Similarly, in the other most common room category, ensuite self-catering, institutions may also have led the way in raising rents. The average weekly rent went up by 21 per cent between 2009-10 and 2012-13, whereas rent for rooms under nomination agreements and private providers rose less, by 16 per cent and 17 per cent respectively.

Again, the cost differential between education institutions and private providers has narrowed. In 2009-10 renting from an education institution was on average £2.86 a week cheaper than renting from a private provider. By 2011-12, however, education institutions were actually £0.48 a week more expensive than private providers and rooms let through nomination arrangements were actually cheaper than rooms offered directly by the education institution (by £2.82 a week).

Changes in rental price according to room and provider type are shown at Figure 3.

Figure 3: Average weekly rent according to accommodation category with relative increases and decreases year on year

Institution	2006-07	2008-09	2009-10	2011-12	2012-13	Actual increase / decrease 2011-12 to 2012-13	Actual increase / decrease 2006-07 to 2012-13	Real Percent Increase 2008-09 to 2012-13
Self-catering single	£69.00	£74.68	£78.84	£95.30	£97.08	1.87	40.69	16%
Self-catering ensuite	£86.00	£95.88	£101.64	£118.85	£122.81	3.33%	42.80%	15%
Studio flat single	£110.00	£118.50	£130.47	£153.60	£134.40	-12.50%	22.18%	1%
Studio flat double	£110.00	£127.63	£136.93	£153.16	£138.95	-9.28%	26.31%	-3%
Full board single	£105.00	£109.89	£114.29	£132.99	£143.82	8.15%	36.97%	17%
Full board ensuite	£128.00	£135.49	£146.73	£165.18	£171.72	3.96%	34.15%	13%
Full board double or twin rooms		-	-	£127.15	£133.33	4.87%		
Full board double or twin rooms ensuite		-	-	£144.56	£135.94	-5.96%		
Part board single	£90.00	£101.78	£105.94	£124.68	£121.56	-2.50%	35.07%	7%
Part board ensuite	£120.00	£113.54	£118.38	£136.62	£141.82	3.81%	18.18%	11.7%
Part board double or twin rooms		-	-	£102.00	£102.60	0.59%		
Part board double or twin rooms ensuite		-	-	£132.00	£117.27	-11.16%		
Houses	£76.00	£110.03	£108.91	£113.41	£115.00	1.40%	51.32%	-7%
Flats	£82.00	£119.81	£126.12	£104.80	£104.93	0.12%	27.96%	-22%
Self-catering twin		-	-	£100.43	£99.62	-0.80%		
Self-catering ensuite twin		-	-	£108.56	£110.80	2.07%		
Other		-		£89.31	£91.54	2.50%		

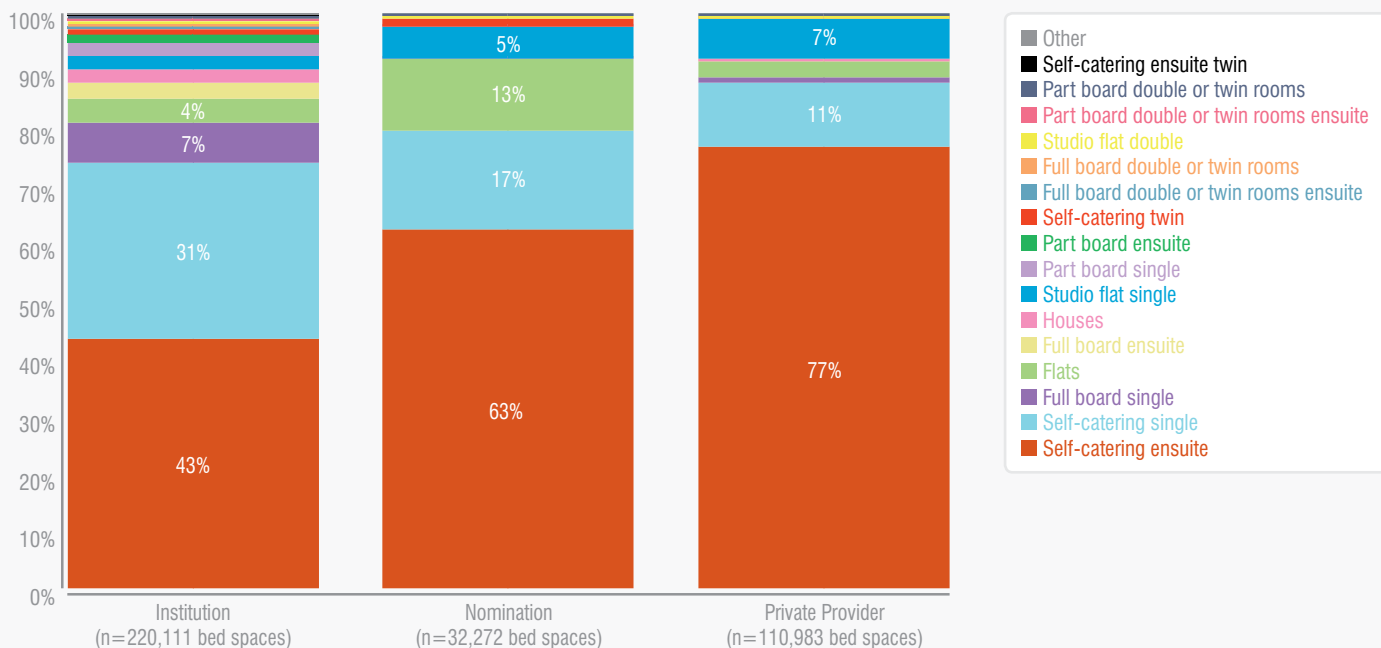
Nomination	2006-07	2008-09	2009-10	2011-12	2012-13	Actual increase / decrease 2011-12 to 2012-13	Actual increase / decrease 2006-07 to 2012-13	Real Percent Increase 2008-09 to 2012-13
Self-catering single	77	£76.40	£84.02	£90.78	£97.05	6.92%	26.04%	14%
Self-catering ensuite	86	£95.64	£103.37	£110.07	£119.99	9.01%	39.53%	12%
Studio flat single		£130.67	£147.74	£155.82	£160.58	3.06%		10%
Studio flat double		£137.17	£179.25	£120.54	£132.33	9.79%		-14%
Part board single		-	-	£114.27	£118.30	3.53%		
Part board double or twin rooms		-	-	£153.83	£135.67	-11.80%		
Houses		-	-	£110.80	£94.00	-15.16%		
Flats		-	-	£111.62	£112.55	0.83%		
Self-catering twin		-	-	£132.13	£133.98	1.41%		
Self-catering ensuite twin		-	-	£166.46	£163.10	-2.02		

Private providers	2006-07	2008-09	2009-10	2011-12	2012-13	Actual increase / decrease 2011-12 to 2012-13	Actual increase / decrease 2006-07 to 2012-13	Real Percent Increase 2008-09 to 2012-13
Self-catering single	71	£76.07	£85.57	£97.95	£98.31	0.37%	38.47%	16%
Self-catering ensuite	80	£100.29	£104.50	£118.74	£122.33	3.02%	52.91%	9%
Studio flat single	114	£121.83	£128.45	£175.14	£188.09	7.39%	64.99%	38%
Studio flat double	114	£142.26	£143.92	£189.85	£157.43	-17.08%	38.09%	-1%
Full board single		-	-	£194.00	£136.17	-29.81%		
Full board ensuite		-	-		£159.00			
Full board double or twin rooms		-	-	-	£96.00			
Part board single		-	-	£140.00	£148.00	5.71%		
Part board double or twin rooms		-	-	£211.00	£222.00	5.21%		
Houses		-	-	£88.50	£85.60	-3.28%		
Flats		-	-	£136.30	£139.33	2.22%		
Self-catering ensuite twin		-	-	£77.50	£82.00	5.81%		

Accommodation Costs Survey

Now that the rent levels of the two most common and more affordable categories of accommodation have roughly equalised across provider types, there is a more complex interplay of factors producing the broad disparity in average rent levels between institutions and private providers.

Figure 4: Accommodation categories and percentage of bed spaces offered (n=363,366 bed spaces)



As is illustrated by Figure 4, private providers generally include more upmarket accommodation in their portfolios, such as studio flats where rent levels outstrip institutional equivalents (by 40 per cent in the case of studio flat singles). In addition, private providers offer significantly more self-catering ensuite rooms than self-catering singles. Rents for this room type are higher.

The very top-end accommodation, in which private providers have often specialised, is still a relatively new phenomenon, but one which has clearly had a significant impact on the market.

Length of contract and impact on cost

Another key factor in the overall price of accommodation is the length of contract offered. For 2012-13 the average contract length for institutions is 41

weeks. This compares to an average contract length of 44 weeks for privately provided accommodation and 45 weeks for provision made available through nomination agreements. It is likely that the shorter contract length for institutions is dictated by a perceived need to align with academic terms. This is particularly pronounced for full or part board options, where the average contract length drops to 37 weeks for institutions.

In contrast, private providers and some rooms under nomination agreements may house students from multiple institutions with differing term times. In these cases students will, on average, pay an extra three to four weeks' rent. Figure 5 shows the average contract lengths according to provider and room type.

In contrast, private providers and some rooms under nomination agreements may house students from multiple institutions with differing term times. In these cases students will, on average, pay an extra three to four weeks' rent, which they may not make use of.

Figure 5 shows the average contract lengths according to provider and room type.

When the weekly rents for each accommodation type are multiplied by their contract length to give the annual amount to be paid by students, the impact of the longer contract length, combined with higher average rent levels becomes more pronounced. The mean annual rent for institutions is £4,799.77, whereas private providers will require a mean of £6,411.25. This equates to those in privately provided accommodation paying 34 per cent more than those under shorter leases with institutions. As is shown by Table 1, however, the median annual rent levels charged by private providers are much closer to the

institutional figure. This demonstrates the impact that the top end offerings in the private sector have on the headline averages.

The mean annual rent for a room across all three provider types is £5,244.04.

Table 1: Overall annual rental ranges according to provider

Provider	Minimum annual rent	Average annual rent	Median annual rent	Maximum annual rent
Institution	£1,170	£4,798.92	£4,512	£15,249
Nomination	£1,936	£5,114.19	£4,730	£14,484
Private Provider	£1,596	£6,309.69	£5,246	£22,360

Figure 5: Average length of contract by category of accommodation

Provision	Category	2008-09	2009-10	2011-12	2012-13
Institution	Self-catering single	40	39	41	41
	Self-catering ensuite	40	40	41	41
	Studio flat single	40	44	43	42
	Studio flat double	40	43	44	45
	Full board single	37	37	37	37
	Full board ensuite	36	36	37	37
	Full board double or twin rooms	-	-	34	35
	Full board double or twin rooms ensuite	-	-	34	33
	Part board single	38	38	37	38
	Part board ensuite	37	37	39	40
	Part board double or twin rooms	-	-	37	35
	Part board double or twin rooms ensuite	-	-	37	38
	Houses	44	45	44	45
	Flats	46	45	43	42
	Self-catering twin	-	-	41	38
	Self-catering ensuite twin	-	-	35	32
	Other	-	-	42	42
Nominations	Self-catering single	43	42	44	44
	Self-catering ensuite	43	43	45	44
	Studio flat single	44	44	45	44
	Studio flat double	46	44	44	44
	Part board single	-	-	44	44
	Part board double or twin rooms	-	-	44	42
	Houses	-	-	44	44
	Flats	-	-	45	44
	Self-catering twin	-	-	46	44
	Self-catering ensuite twin	-	-	44	44
Private Providers	Self-catering single	44	44	43	43
	Self-catering ensuite	44	44	44	44
	Studio flat single	46	47	46	47
	Studio flat double	48	49	48	48
	Full board single	-	-	21	37
	Full board ensuite	-	-	-	40
	Full board double or twin rooms	-	-	-	40
	Part board single	-	-	52	52
	Part board double or twin rooms	-	-	52	52
	Houses	-	-	45	45
	Flats	-	-	46	46
Self-catering ensuite twin	-	-	44	44	

Figure 6: Percentage inclusion of utilities in rent, according to provider

Institution	2006-07	2008-09	2009-10	2011-12	2012-13
Internet	74%	80%	83%	83%	82%
Wi-Fi	-	-	-	32%	50%
Energy	91%	97%	97%	94%	96%
Insurance	56%	59%	59%	81%	80%
Parking	-	-	-	18%	16%
Nomination	2006-07	2008-09	2010-11	2011-12	2012-13
Internet	-	64%	76%	81%	77%
Wi-Fi	-	-	-	21%	51%
Energy	-	96%	97%	98%	97%
Insurance	-	64%	65%	67%	65%
Parking	-	-	-	10%	8%
Private Provider	2006-07	2008-09	2010-11	2011-12	2012-13
Internet	17%	69%	79%	89%	91%
Wi-Fi	-	-	-	12%	31%
Energy	55%	91%	88%	97%	97%
Insurance	83%	85%	81%	94%	93%
Parking	-	-	-	2%	3%

Car parking

Car parking is almost always an add-on cost. Only 16 per cent of institutions provide parking within the rent, as compared to only 3 per cent of private providers.

The internet and Wi-Fi

Although most rent inclusions are relatively consistent across 2006-13, the area of technology has seen some change.

Internet

Between 77-91 per cent of rooms have internet costs included in the rent. Amongst institutional providers 82 per cent wrap the cost of the internet into their rent, a level which has been consistent since 2008 (when it was 80 per cent).

Amongst private providers 91 per cent now include internet within the rent. This figure has risen from 81 per cent in 2009. Reference was made elsewhere to the private sector beginning to compete more directly with institutional accommodation and, rather surprisingly,

internet-inclusive rents are now more prevalent in the private sector than in education institutions.

Wi-Fi

Wireless services are increasingly being requested by students, keen to be able to use their laptops and hand-held devices anywhere within their building. The generally received wisdom is that wired internet is more reliable and wired systems are still fitted into almost all new halls. However, wireless systems are emerging as a strong consumer preference for phone and non-work-related networking and gaming. Many suppliers are now installing Wi-Fi as a new amenity.

In 2011-12 32 per cent of institutions had installed Wi-Fi. By 2012-13 this proportion has increased significantly to 50 per cent. Private providers were slower off the mark with only 12 per cent installing Wi-Fi in 2011, but this has increased to 31 per cent in 2012-13.

It can be safely predicted that Wi-Fi will, over the next two years, reach the same level of penetration into developments as wired internet. At the moment it is seen by students as an added-value amenity but as

time goes by Wi-Fi will increasingly be viewed as part of the necessary infrastructure of the building.

Although at an early stage, inclusive internet for students often allows access to other packages of services at an add-on, but often heavily discounted, price. These additional service packages are set to increase in use. Television delivery is also beginning to become commonplace through the internet, giving international students in particular much wider access to their domestic TV stations.

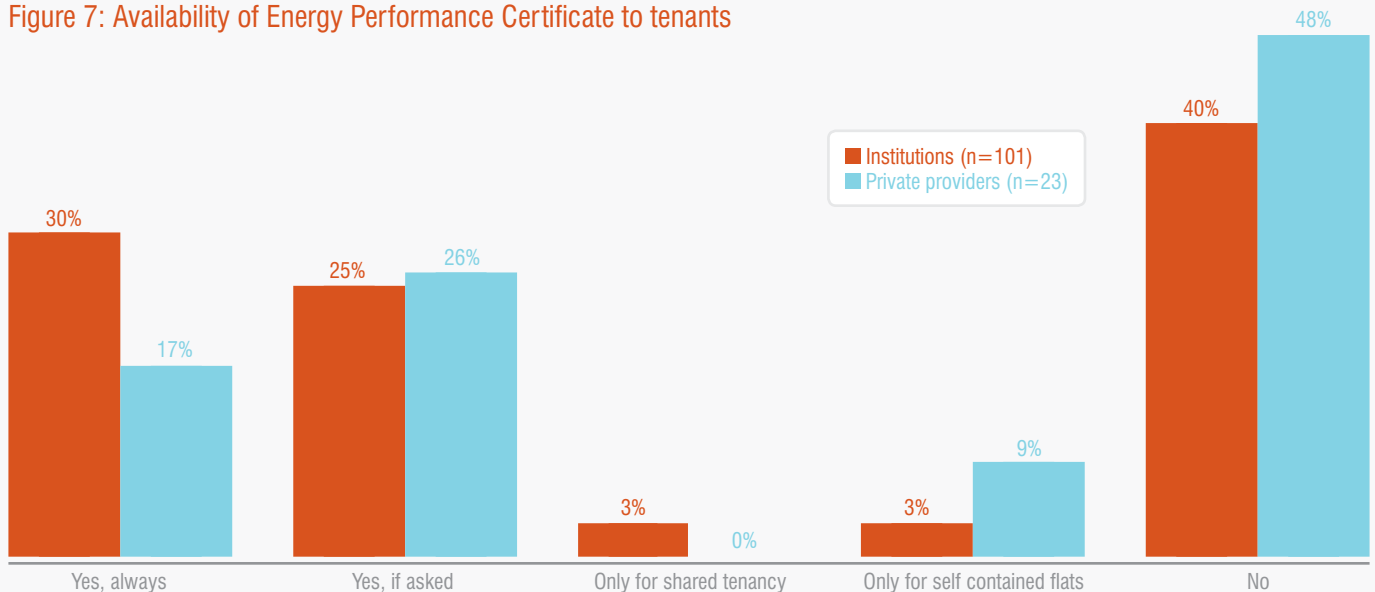
Energy Performance Certificates (EPCs)

Energy Performance Certificates provide information on the energy efficiency standards of the property to which they apply. The law requires landlords to give tenants

a copy of the relevant EPC when a whole property is rented². Universities are currently exempted from this requirement.

Figure 7 shows that few accommodation providers (17 per cent) have made EPCs available to their tenants. Although it is difficult to establish the extent, if any, of breaches of the legal requirement among private providers, the low figure is a cause for concern. Whilst around a quarter of private providers make the EPC available if asked, this does not appear to meet the requirements of the legislation. Half of providers do not make the certificate available at all, even when asked to do so. Survey results indicate that institutions are performing better in this regard, even though they are exempt from the legal requirement.

Figure 7: Availability of Energy Performance Certificate to tenants



Additional fees and costs

Booking fees

Institutions are less likely to charge additional fees than private providers and nomination agreements.

Overall, 43 per cent of accommodation providers charge an administration fee to cover cancellation (effectively a booking fee), compared to 28 per cent in

2009-10. The figure for private providers is 65 per cent and for institutions 37 per cent.

For institutional providers, the average booking fee was £108.86. This was down from £150.59 in 2009-10. For private providers the average fee was £131.25, down from £135.28 in 2009-10.

It is pleasing that these 'booking fees'³, are reducing in cost to cover just what they are supposed to: the additional administration required to process the booking.

Eighty per cent of providers now have an online application system for students: 82 per cent of education institutions and 73 per cent of private providers.

Rent payment in advance

Some form of rent payment in advance is required by 46 per cent of accommodation providers: 81 per cent of private providers, as opposed to 37 per cent of institutions. Where a payment is requested, this is frequently a significant sum of money: an average of £518.83 for private providers and £300.53 for institutions.

Deposits

Among accommodation providers 65 per cent require a deposit or substantial upfront payment: 73 per cent of private providers have such stipulations compared with 63 per cent of institutions. When deposit protection was introduced in England and Wales in April 2007, only private providers who let their rooms as assured shorthold tenancies were required to protect their deposits. This new form of protection resulted in a

significant fall in the requirement that a deposit should be paid (from 79 per cent in 2006-07 to 62 per cent in 2009-10). Since that fall, the use of deposits has again been slowly increasing.

The average deposit required by a private provider is £300 (up from £238 in 2009-10) and by an education institution £288 (up from £198 in 2009-10).

Not only, then, are deposits increasing in use; they are getting higher.

There is little difference between private providers and institutions in the time they typically take to return deposits to students: they share a minimum of one week and a maximum of eight weeks. The average time for institutions was four weeks, compared to three weeks for private providers. This is a pleasing reduction on 2009-10, when some institutions took as long as 16 weeks. It should also be remembered that most education institutions are members of the government-approved codes of practice and all codes now impose a four-week deadline for returning deposits. With the odd exception, this stipulation is, for the first time, now being met.

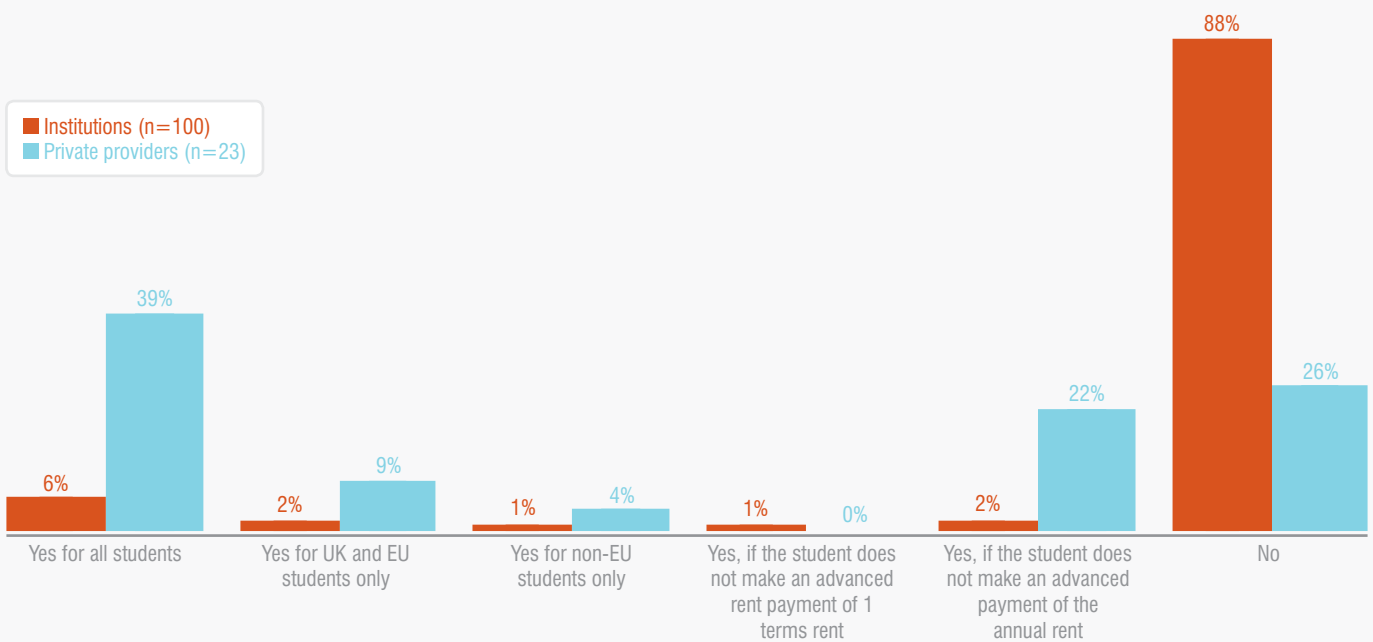
Figure 8: Average payments, fees and deposits required by accommodation providers



Guarantors

Seventy-six per cent of accommodation providers do not require some form of guarantor for rent payments. Guarantors are mainly used by private sector providers, as many institutions still believe that they can exert other, academic-related pressures on students to pay their rent, notwithstanding the questionable legitimacy of their methods. Eighty-nine per cent of institutions do not use guarantors, as compared to only 25 per cent of private providers.

Figure 9: Provider comparison on the requirement for a guarantor for rent payments



Affordability of accommodation

In order to try to gauge affordability, it is helpful to set the annual cost of accommodation within the context of available levels of student support. For the purposes of this report, the level of financial support will be treated as the funding a student domiciled in England and studying outside London would be eligible to receive.

Under the new funding system, new students eligible for the basic rate of loan will receive £5,500 to cover living costs for the 2012-13 academic year. On the basis of average rent figures, students receiving this level of support would be left with well under £1,000 to cover other living costs after rent is deducted. If renting an averagely priced room from a private provider, they

would be left with a shortfall of over £800 before other essential costs such as food and travel are factored in. It should be noted that these calculations do not include additional costs such as deposit charges. Returning students who opt to live in purpose-built accommodation will be eligible only for a basic maintenance loan to a maximum of £4,950.

This funding shortfall must somehow be met through a combination of family support, part-time work and savings as well as grants, benefits and bursaries for those who are eligible. This is particularly difficult for students without parental support or personal savings. Research has suggested that, for many students, increasing living costs and inadequate student support have led to a growing reliance on part-time work –

half of students now work during their studies⁴. NUS research in 2010-11 indicated that covering basic living costs was one of the primary drivers for students seeking employment – 36 per cent stated that their basic living costs exceeded what they could borrow through student or bank loans⁵.

Over a fifth of students now work more than 20 hours a week. This increasing reliance on part-time work should be a matter of concern for institutions.⁶ Recent NUS research found that many of those students who take on part-time work feel that it takes time away from their studies⁷. In addition, with employment increasingly hard to come by, students may be more likely to take on riskier debt. There is already evidence that large numbers of students are borrowing at high interest rates and that this practice correlates directly with students' socio-economic status⁸.

Over the last six years, annual rent has increased from £3,190.37 in 2006-07⁹ to £5224.04 in 2012-13. This represents an increase of 63 per cent. In 2006-07, the basic level of maintenance loan was £4,405 – this has increased by just 25 per cent to reach the current level of £5,500. As a result, students are left with less and less to live on after they have paid their rent.

With maintenance loans frozen again for next academic year, it is vital that accommodation providers consider the impact of their rent-setting – and their plans for future development – on students who are struggling financially. Given the proportion of student income now absorbed by rent for purpose-built accommodation, it is an inescapable conclusion that rising accommodation costs are a major contributory factor to student hardship.

Provision and rent: variation across regions and institutions

Regional variations

As might be expected there are significant regional variations in rent.

The average weekly rent in London is £157.48 per week, up 26 per cent from £125.34 in 2009-10. This rise in the average rent is largely attributable to the increasing number of studio flats in London.

In terms of the range of weekly rents, London has the most expensive institutional offering at £320 and also the most expensive private provider offering at £415.00. But it also has one of the cheapest institutional rents at only £39.00, far below the cheapest private sector rent at £96.00.

The east of England has the second highest overall average weekly rent at £134.18. At £265.00 per week, the East of England also has the highest non-London rent, charged by an education institution.

The cheapest region to live in remains Northern Ireland at £83.01. Although this was also the case in 2009-10 when the average rent was £64.17, average rents have seen a 29 per cent rise over the last three years.

In London, Scotland and the East of England rents are skewed to the high end of the rental structure while there is only limited availability of accommodation at lower-cost rents. Other regions offer a greater and more equally distributed set of rental ranges for their students.

Figure 10: Changes in rent by region 2012-13

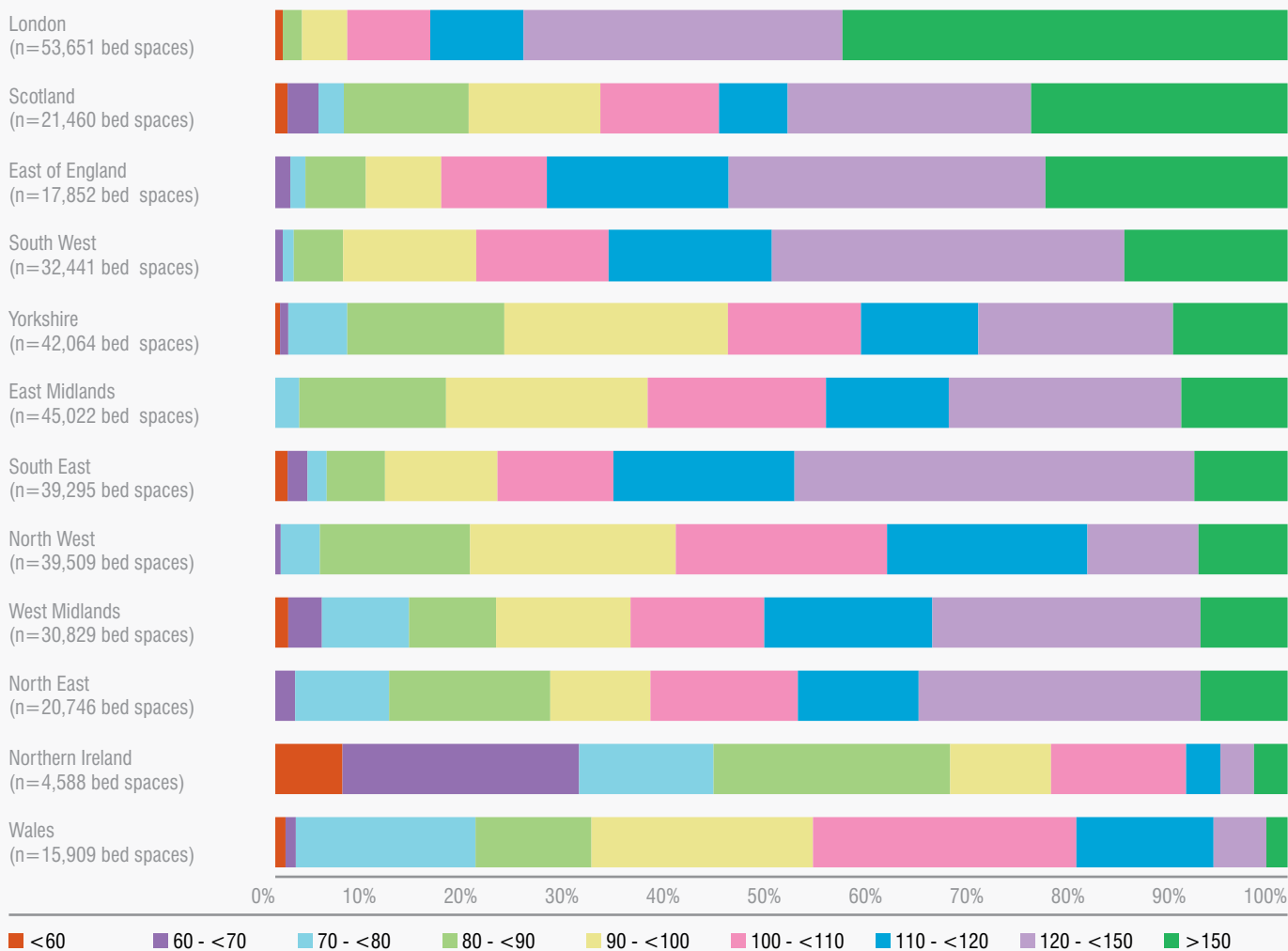


Figure 11 gives the regional average weekly rents in 2012-13 by provider. The disparity between providers can be clearly seen in the London rental structure which is different to other regions. In the East of England, although rents are high, there is less variation in the

rents different providers charge, but it is an unexpected and surprising finding that private provider rents are markedly lower (£119.64 per week) than institutional rents (£143.57).

Figure 11: Regional average weekly rents according to region and provider, 2012-13

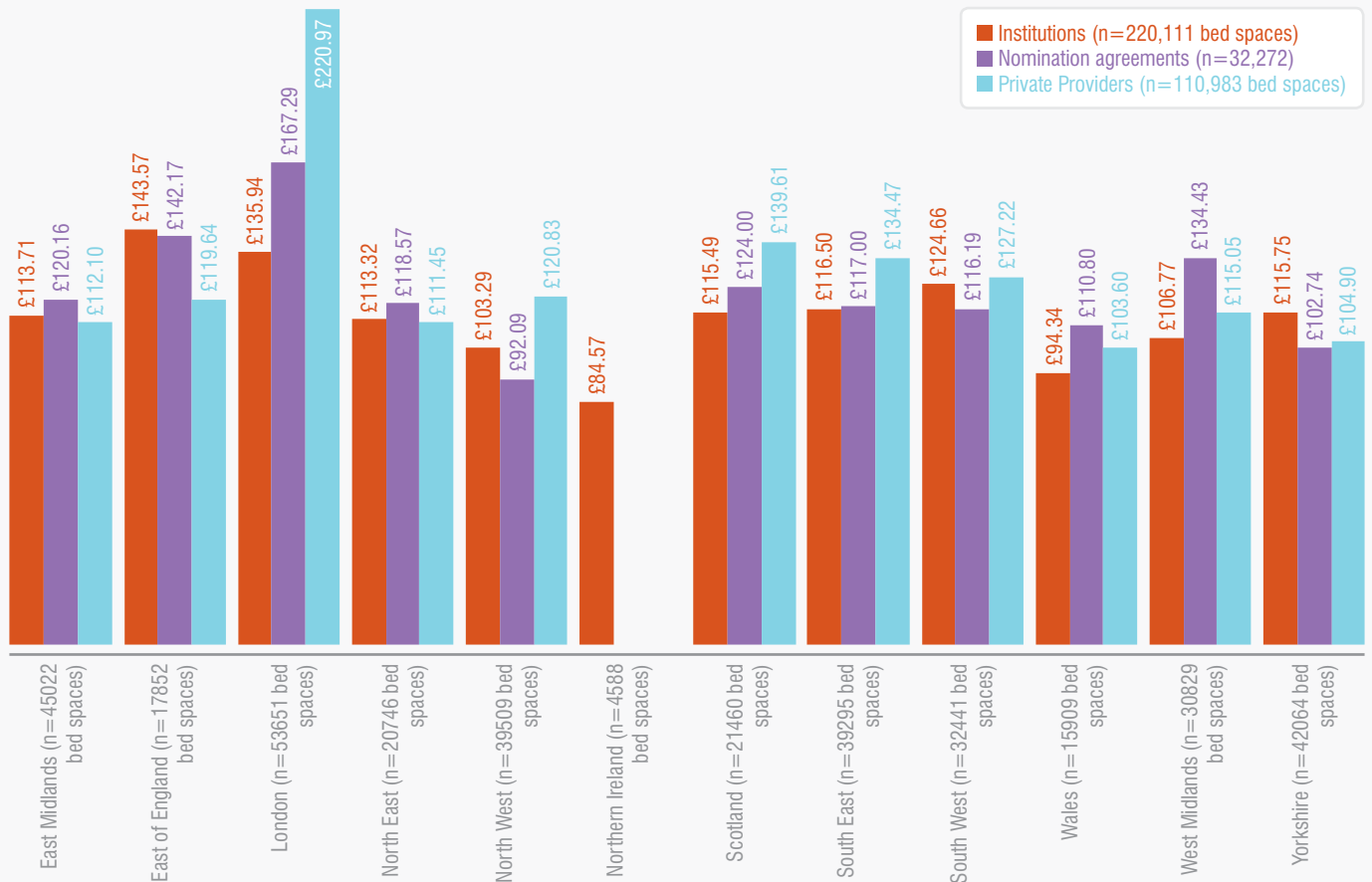


Figure 12 details the average weekly rent for each accommodation type according to their region.

Figure 12: Average weekly rent for each accommodation category according to region

Accommodation category	East Midlands	East of England	London	North East	North West
Self-catering single	£91.60	£95.25	£118.17	£81.99	£89.62
Self-catering ensuite	£110.72	£117.35	£149.88	£106.00	£105.82
Studio flat single	£137.26	£126.64	£231.61	£145.45	£135.68
Studio flat double	£116.55	£130.33	£207.50	£120.33	£144.88
Full board single	£135.49	£128.00	£154.42	£143.86	£117.38
Full board ensuite	£170.60		£195.33	£150.92	£136.25
Full board double or twin rooms	£119.33		£141.06	£153.82	
Full board double or twin rooms ensuite	£149.15		£97.75	£154.78	
Part board single	£119.19	£111.50	£143.38	£128.00	
Part board ensuite		£144.50	£167.73	£119.00	
Part board double or twin rooms	£157.59		£112.23	£113.00	
Part board double or twin rooms ensuite			£128.13		
Houses	£82.97	£166.36	£121.11	£110.00	£69.50
Flats	£119.01	£175.00	£156.39		£93.49
Self-catering twin	£134.05	£111.00	£112.00		
Self-catering ensuite twin	£108.09		£147.63		
Other					
Regional average	£112.63	£134.18	£157.48	£111.76	£106.49

As mentioned previously, it is important that rent levels give some consumer choice across a range in order to avoid pricing the least well-off students out of the market or forcing them to study at home.

Provision and rent: variation across regions and institutions

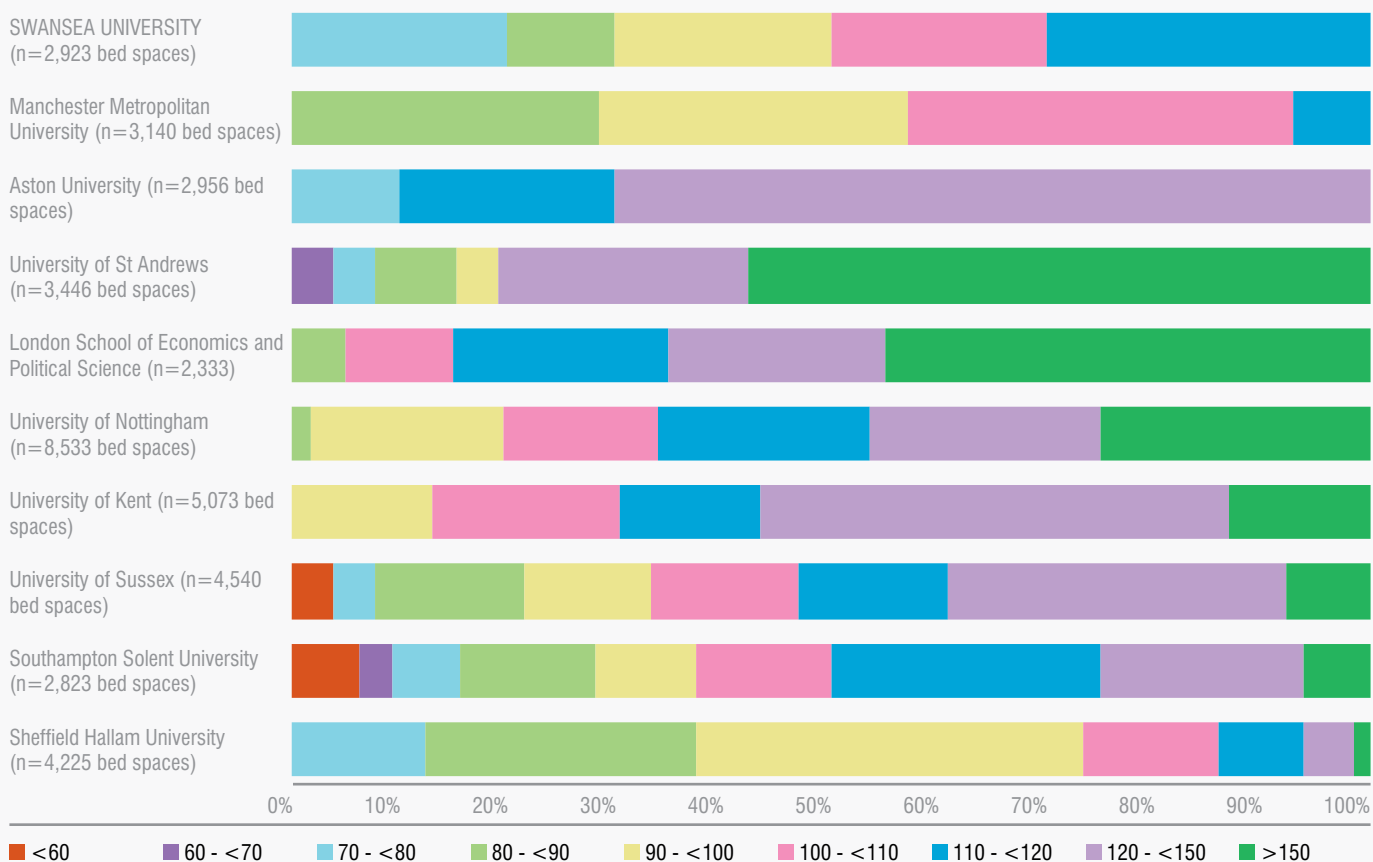
	Northern Ireland	Scotland	South East	South West	Wales	West Midlands	Yorkshire
	£76.63	£92.06	£101.23	£101.20	£78.50	£85.41	£87.03
	£98.50	£116.74	£122.55	£118.69	£99.15	£109.57	£103.56
	£102.83	£167.45	£141.84	£143.71	£118.28	£149.21	£127.27
	£69.50	£144.65	£182.10	£163.33	£127.00	£139.50	£130.70
		£154.36	£146.13	£159.95	£104.71	£122.95	£131.69
		£177.69	£154.50	£194.70		£153.40	£155.66
		£147.91	£128.80	£119.50	£82.29	£95.75	
		£179.67		£136.40	£80.00		
			£133.80	£90.00	£101.33	£110.17	£108.67
			£151.57	£107.50	£96.00	£129.08	£129.13
			£101.00				
			£97.33				
	£66.78	£90.60	£104.00	£100.88	£69.50		£104.62
	£92.59	£100.06	£114.90	£120.82	£77.50	£116.80	£124.50
			£58.83	£79.40			
				£73.00		£51.00	
							£90.74
	£83.01	£121.80	£117.77	£123.42	£95.50	£108.90	£108.73

Rents by institution

Comparing rents at different institutions is complex, with location, institutional characteristics and levels of catered provision all leading to widely varied rental structures.

A look at the rental spread from ten institutions across the UK reveals the wide range of rents offered at these institutions. The percentages of bed spaces available at various rent levels are shown.

Figure 13: Rental range in university-owned accommodation at selected institutions, 2012-13



When compared to the last survey, the sample institutions have equal or greater range in the rent levels available. In the last survey the recommendation was made that institutions devised rent structures which offered a range of product types and rent levels to enable poorer students to attend. There is some evidence that there is greater, or at least no worse, range offered by institutions.

However, whilst the range of rents on offer has stabilised or increased, since the last survey there has been a decrease in the number of cheaper rooms available. Seven institutions out of the sample of ten have half or more of their accommodation in the top three rental bands, with rents of £110 per week or more (Aston, University of St Andrews, London School of Economics, University of Nottingham, University of Kent, University of Sussex and Southampton Solent University). In the previous survey just three of the

sample of 13 institutions had more than half of their rents in the top three rental bands with rents of £100 per week or more.

HESA Key Information Set (KIS) records

Key information sets are now available on the cost of student accommodation for each institution on the unistats web site at <http://unistats.direct.gov.uk>. The key information was tested for each of the case studies featured in this report to see whether the HESA information was consistent with what was obtained for this survey. The institution-owned/sponsored accommodation average costs (upper and lower

quartiles) were tested against a typical annual cost of institutional accommodation and the median rent for each institution.

The distance between the upper and lower quartiles gives an indication of the spread of rents, as well as a sense of the range of values within which half of all rents fall. However, as can be seen from the comparisons, the median rent itself may be well towards the lower or the upper quartile rather than in the middle. The conclusion is that it would also be useful for prospective students to know the median rent. A requirement to provide the median rent would also help eliminate apparent errors in the current KIS statistics involving the identification of an inter-quartile range that does not include the median rent.

Figure 14: Institution-owned/sponsored accommodation

Institution	HESA average annual costs	average rent (upper and lower quartiles)	median rent
Aston	£4,500-£5,000	£4,673	£4,719
LSE	£4,700-£7,500	£5,590	£5,009
Manchester Metropolitan	£3,800-£4,300	£4,097	£4,118
Sheffield Hallam University	£3,200-£4,400	£4,145	£4,059
Southampton Solent University	£4,100 - £4,800	£4,462	£4,613
Swansea University	£3,400-£4,500	£4,351	£4,332
University of Kent	£4,200-£5,500	£5,323	£5,202
University of Nottingham	£4,100-£5,800	£5,525	£5,233
University of St Andrews	£4,700-£5,300	£5,462	£5,643
University of Sussex	£3,500-£5,100	£5,017	£4,914

Purpose-built provision and the private rented sector: comparisons by city

Introduction

The data used in this section was collected in addition to the main survey and is intended to provide an illustration of the pricing structure within different student accommodation rental markets.

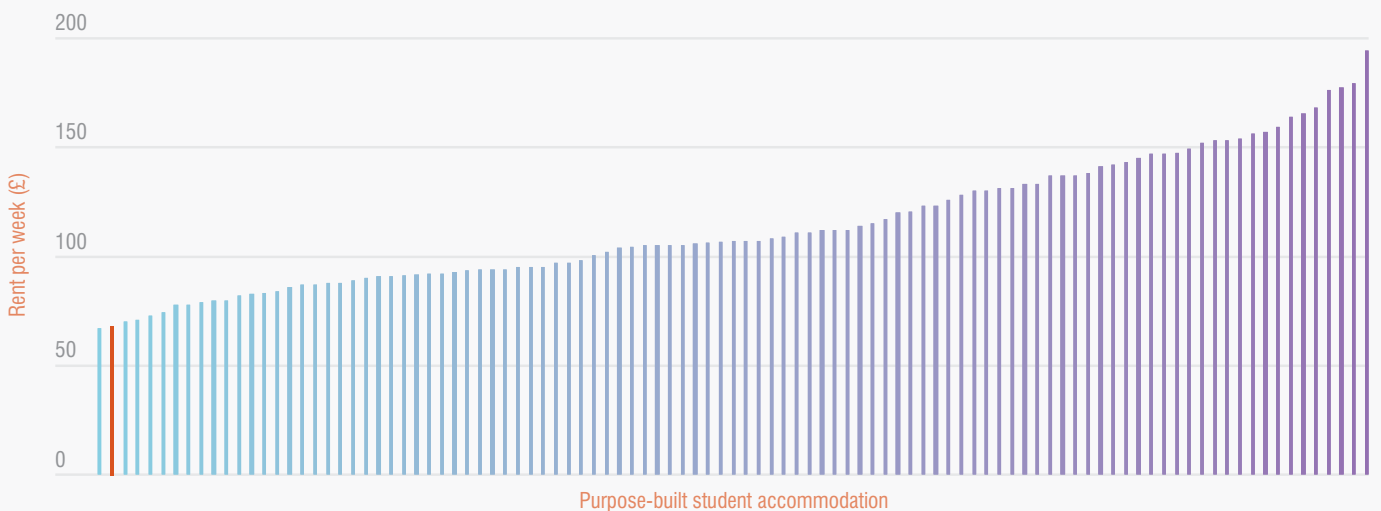
Where it is available, information about the average rent of a room in an off-street property has been included to give some comparison between this type of accommodation and purpose-built provision. Because of the nature of the off-street student accommodation market, it is difficult to establish wholly accurate data, particularly in terms of rent levels and whether utilities are included in the rent. A number of cities have been analysed where there is 'central point' in the student accommodation market and data has also been used for cities where a significant amount of work has been done in the local area.

To support comparison between rents for purpose-built accommodation and rents for off-street housing, adjustments have been made so that rents are fully comparable over a 44-week contract. Allowance in the rent figures for off-street properties has been made for inclusivity of insurance (£3.00), utilities (£6.00) and internet (£2.80). Some rents will include additional items such as travel cards, Junior Common Room fees and access to fitness facilities, but these are not treated here as core to the accommodation product and are therefore excluded.

Shaded columns on the graphs represent different weekly rents for developments. The comparative rent for an off-street property is indicated in orange on the graph.

The horizontal axis represents each development/property; the vertical axis represents the average rent per week.

Figure 15: Nottingham rents 44 Weeks 2012-13



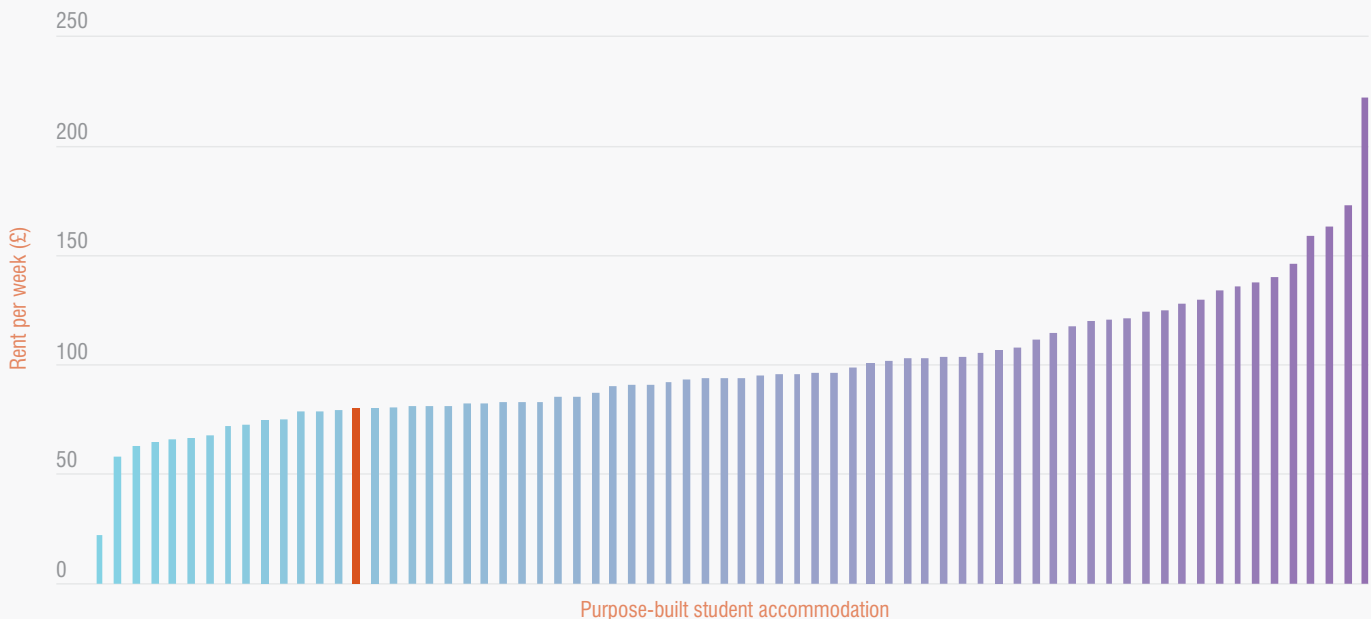
In Nottingham there are four options in purpose-built accommodation that are cheaper than living in an off-street property, compared to just one option during the last survey. Many of the lower-priced halls below £80 per week have shared bathroom facilities.

Rooms with ensuite facilities start at £83 and go up as high as £131 a week. There are 36 different ensuite options available in the city, up from 20 at the time of the last survey.

Once rents move over £130, the accommodation becomes self-contained, with either one or two bedroom studios and one bedroom flats.

At the time of the last survey there were fewer rent options below the cost of a room in an off-street property. This shows that purpose-built accommodation is now competing on price with off-street properties in Nottingham.

Figure 16: Leeds rents 44 weeks 2012-13

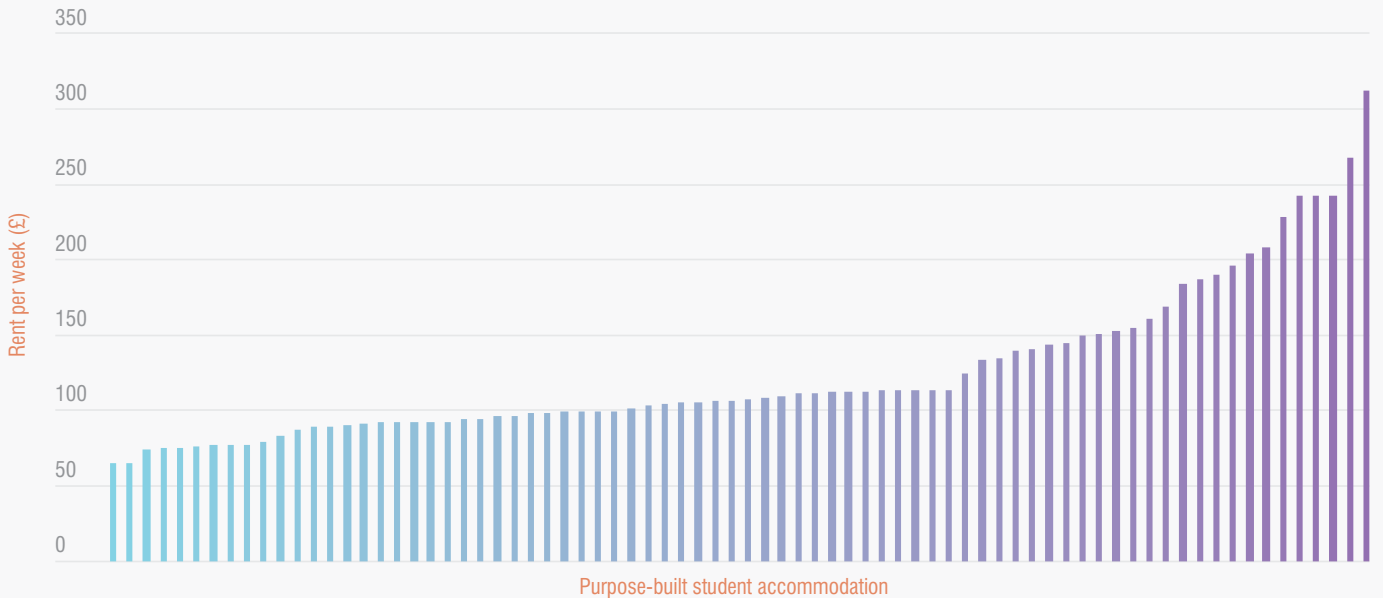


In Leeds there are several options available in purpose-built accommodation which are cheaper than living in an off-street property, when allowance is made for inclusivity. This contrasts with the position shown in the last survey, when living in an off-street property was the cheapest option. It is possible to rent an ensuite room in two developments for less than the average cost of a room in an off-street property. Over half of the rents on offer are below £100 per week. This has not changed since the last survey. There are a significant number of private providers active in Leeds who rent directly into the market and this competition has resulted in rents remaining relatively stable.

Much of the accommodation at the lower end of the graph is owned by institutions in the city and has shared bathrooms. The cheapest option at £22 is a hall owned by an institution that is due for closure and is being used for part of the letting year only.

Rents in ensuite accommodation range from £63 to £117 a week. Above this level, accommodation tends to be in studio or one-bedroom flats, which by bed space make up a relatively small proportion of the available accommodation.

Figure 17: Birmingham rents 44 Week 2012-13



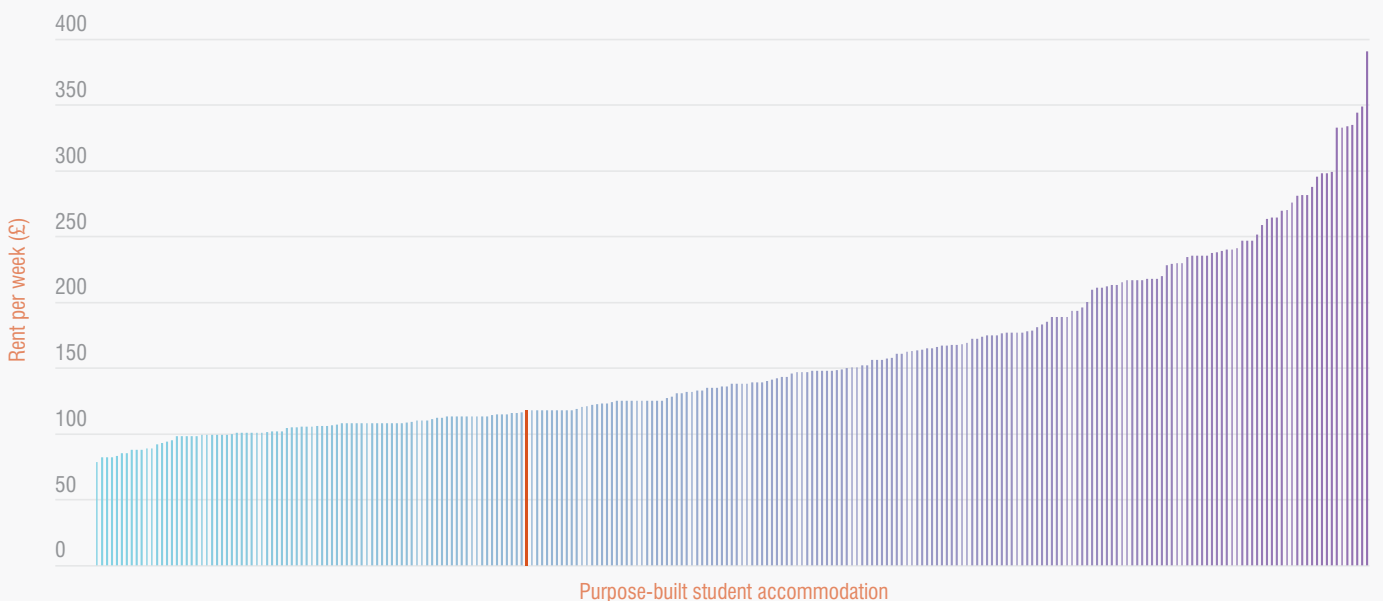
In Birmingham the range from cheapest to most expensive is broad, with the cheapest room at £62 and the most expensive at £316.

When allowance is made for length of let and inclusivity, ensuite rooms start at £78 per week, rising to £119 for self-catering ensuite (although the most expensive catered option available at an institution is £152).

At the time of the last survey, three quarters of the rooms available had rents lower than £100 per week. This proportion has reduced to less than half since then.

The student accommodation market in London is unique in the UK sector.

Figure 18: London rents 44 Weeks 2012-13

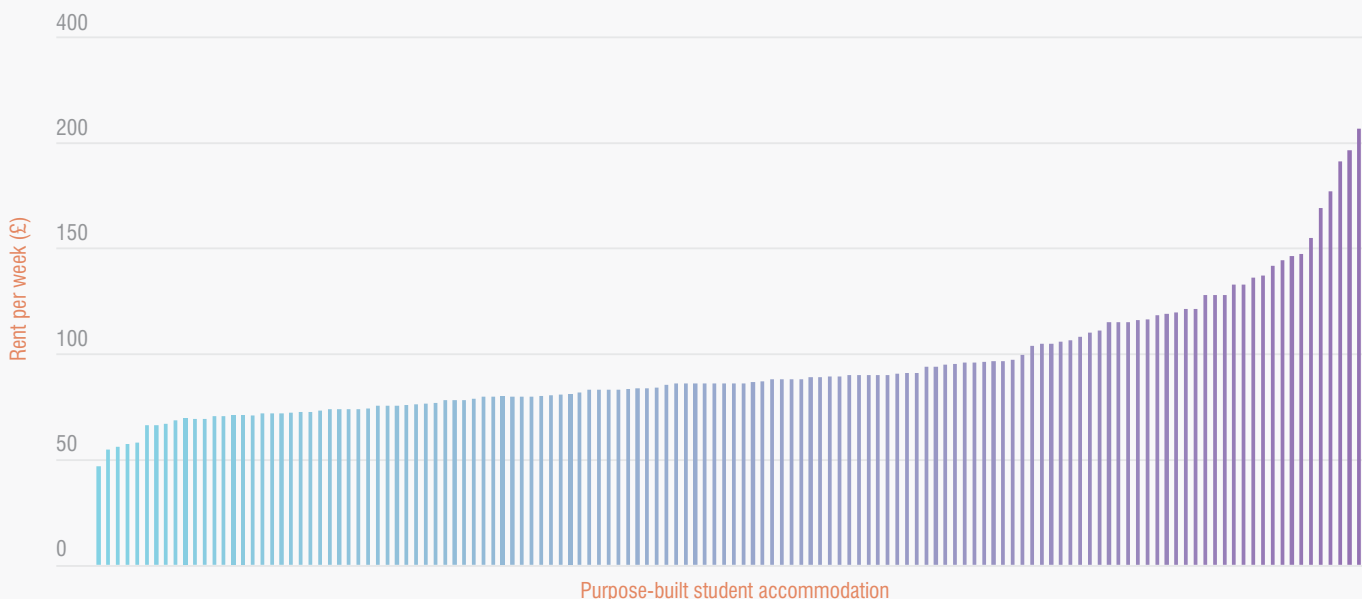


There are considerably more types of accommodation provided by institutional or charitable providers, and these make up the majority of rooms available under £150 per week.

The cheapest private sector purpose-built room, when allowance is made for length of let and inclusivity, is available at £105. However, the majority of the ensuite rooms begin at £178 per week, with the most expensive available at £349.

Studio flat rents start at £168, rising to £390 per week.

Figure 19: Sheffield rents 44 Weeks 2012-13



In Sheffield the majority of the market is priced at under £100, even after the emergence of more expensive new-built accommodation in the last decade. This pattern is unchanged since the last survey. Compared to other cities, Sheffield has seen the lowest level of change in rents and range of rents.

Ensuite accommodation starts at £62 a week when standardised for length of let and utilities, rising to £97. Above this level the rooms are studio and one-bedroom flats, which, as is common with most university cities, make up the most expensive market segment but account for the fewest bed spaces.

Conclusions from comparisons

There are, predictably, significant regional variations in rent levels around the UK. However, it is striking that since the last survey, when allowance is made for the cost of utilities and length of let, in some cities off-street accommodation is no longer the cheapest option and purpose-built is now beginning to compete.

Cheaper accommodation tends to belong to the institution and have shared bathroom facilities. It is the case though that there are now smaller providers emerging who are competing with institutions and the off-street market to offer ensuite rooms at similar rents.

There is significant range in the rents available, but care should be taken, particularly by institutions, to maintain a range of rents at the lower end of the market.

The changing shape of purpose- built student accommodation

Types of accommodation

Change over the last ten years to 2012

The range and balance of types of student accommodation continue to change.

In 2001-02 21 per cent of bed spaces were ensuite. This figure increased to 43 per cent in 2006-07 and to 48 per cent in 2009-10. Currently ensuite provision accounts for 59 of the market.

The number of bed spaces in catered accommodation continues to decline: in 2004-05 they represented 19 of the stock. This figure fell to 17 for 2009-10 and again to 15 per cent for 2012-13.

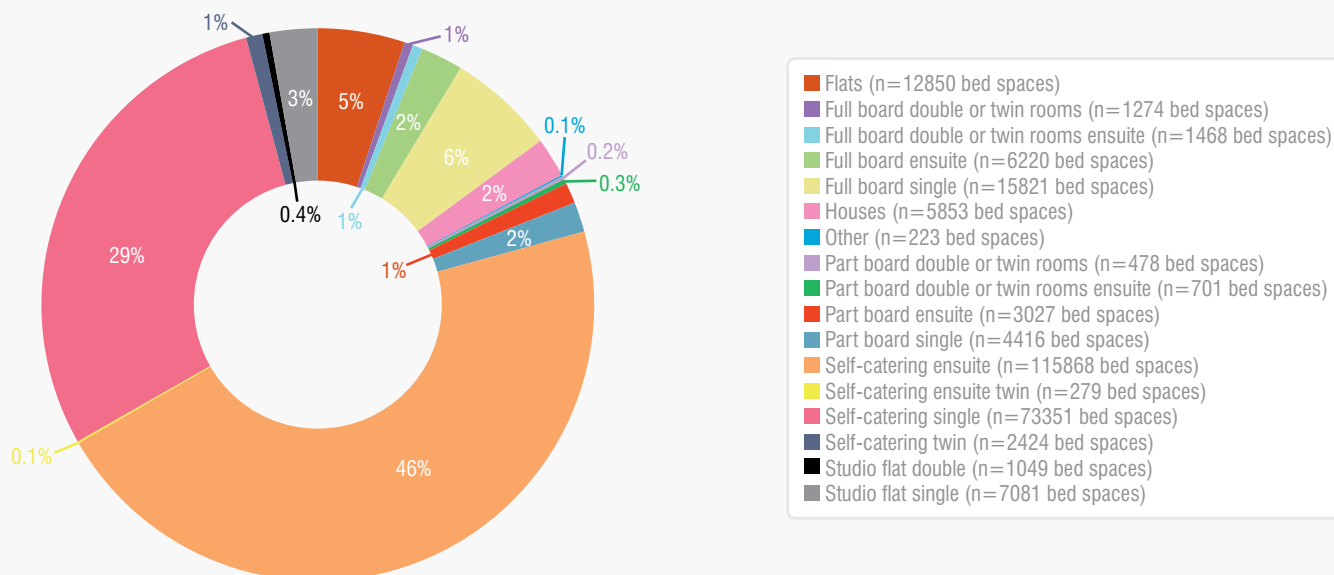
In the 2009-10 survey the comment was made that:

it may be that the catered halls which have survived will remain in service as an enduring part of the culture of the education institutions in which they sit.¹⁰

This was based on the assumption that catered accommodation consisted almost entirely of older late 1960s and early 1970s buildings that remained in use. In fact, over the last few years some of these older buildings have been either decommissioned or dropped and there have been some new catered residences built (for example in Edinburgh, Leeds, York and Cambridge). These tend to fit in with the established institutional culture of catered accommodation being at the heart of the campus (and in many cases linked to conference trade out of term) and often (but not always) relate to a collegiate culture.

Studio flats always have a high profile in accommodation advertising, but the 2009-10 survey revealed that despite the hype they formed only around 2 per cent of the stock, including in London. Studio apartments are not widespread, but their number has increased to 4.5 per cent of the stock by 2012-13.

Figure 20: Bed spaces by category of accommodation 2012-13



Differences between education providers and the private sector

In the types of accommodation that they offer, there are significant variations between education institutions and the private sector.

Institutions tend to have a lower percentage of ensuite bed spaces. Currently 49 per cent of their stock falls into this category, compared with 74 per cent for the private sector (including both bed spaces let directly and through nomination arrangements).

Catered accommodation is provided almost exclusively by education institutions. In 2012-13 this accounts for 15 per cent of institutional bed spaces, as compared to only 1 per cent for the private sector. Studio flats form only 3 per cent of education institutions' bed spaces but represent 7 per cent of private providers' stock.

As is mentioned elsewhere, the significant increase in the growth of private sector studio flats can be tracked to high-cost accommodation recently developed in London.

Sub-sectors

Two sub-sectors of the market are worthy of comment here:

Non-ensuite cluster flats

Lower-cost accommodation has always been associated with shared non-ensuite cluster flats or houses. In 2009-10 this formed 36 per cent of all bed spaces in the student accommodation sector. In 2012-13 the figure has fallen back to 32 per cent. The level of proportional contraction was similar for institutional and privately provided accommodation: for education institutions 40 per cent in 2009-10, reducing to 37 per cent in 2012-13 and for private providers (including nomination arrangements) 22 per cent in 2009-10, reducing to 18 per cent in 2012-13.

There was a fear that, given the direction the sector was heading, ensuite accommodation would be the only option for students. However, education institutions still have 82,300 non-ensuite bed spaces and private providers 15,962, as identified in this survey. If these

were evenly spread through all accommodation markets, this would help to ensure that a reasonable quality of lower-cost shared accommodation remained available. As might be expected, however, the spread is not even and, as has been revealed elsewhere, many education institutions have increased the cost of their non-ensuite accommodation, so that it could now be argued that the historical association between affordability and non-ensuite cluster flats has ended. Non-ensuite does not equal low cost and ensuite no longer represents high cost.

Twin rooms

The other area of interest is shared, or 'twin' rooms, as they have now become known. These have always been a minority form of accommodation (in contrast to some overseas sectors where international comparisons show shared rooms to be much more prominent¹¹). In 2009-10 (and at the report launch) several providers raised the possibility of developing twin rooms in high-cost accommodation areas (particularly London and Edinburgh) to offer an affordable alternative to students needing to spend less on their housing.

There has been considerable debate over what constitutes a twin room but, for the sake of clarity, this category does not refer to single rooms simply doubled up to meet a short-term accommodation shortage (often a single room with a temporary bunk bed). A twin room is a room designed specifically for twin occupancy, with sleeping and study provisions for two students throughout the year.

The 2009-10 survey revealed no twin rooms, although a few clearly were in use. In 2012-13 there are 6,656, amounting to just under 2 per cent of bed spaces supplied. These are to be found almost entirely in institutional accommodation (6,143). What is also of interest is that education institutions have developed twin rooms with both catered and non-catered options. Added to this, they have 956 double studio bed spaces, which further widens the choice of lower-cost accommodation per student.

Specialist and adapted accommodation

The 2012-13 survey also looked at the availability of housing for specific groups, in particular for disabled students and student families. Providers were surveyed on accommodation:

- adapted for physically disabled students
- suitable for students with dependent children
- suitable for students with an adult dependant(s).

Figure 21: Adapted accommodation: total number of bed spaces for each provider

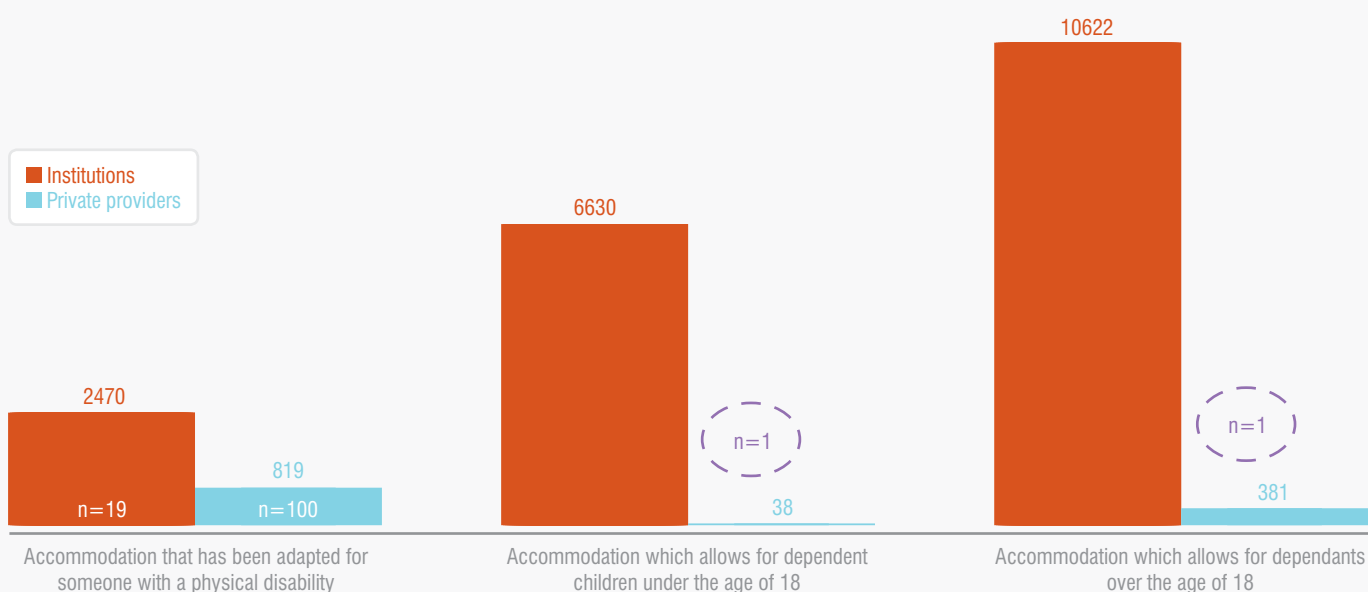


Figure 21 shows that, since the last survey, the proportion of institutions providing some level of accommodation adapted for disabled students has remained static at 95 per cent. In contrast, the proportion for private providers has fallen from 86.2 per cent to 73 per cent. The reduction in provision for private providers may not be as marked as it first appears, because in some new-builds rooms are designed to be accessible and adaptable to meet wider student living requirements. Also, the figure may have been artificially high at the time of the last survey, because the respondents in that instance were weighted more towards smaller and charitable providers of accommodation, more likely to specialise in accommodation for disabled students.

Although the proportion of institutions providing adapted accommodation has remained static, the overall

proportion of bed spaces has reduced for both provider types. This accommodation now represents just 1.1 per cent of institutional provision. This compares to 1.4 per cent in 2009-10. For private providers the proportion of provision has dropped significantly from 4 per cent in 2009-10 to 0.7 per cent. Again, this reduction may in part be accounted for by changes in sample and more rooms being designed and configured more flexibly for wider living needs. However, it remains possible that there has been a significant reduction in the availability of this type of accommodation. In areas where this is the case, it is important that providers review the balance of their provision, and institutions in particular will be mindful of their duties under equality legislation.¹²

For families, 34 per cent of institutions provide for students with dependent children aged under 18 and

21 per cent provide for those with dependants over the age of 18. These account for 3 per cent and 4.8 per cent of bed spaces respectively, although it is unclear whether there is overlap between these two statistics (some may be open for students with dependants of any age). There appears to have been a slight increase in provision overall, with only 32 per cent of institutions offering provision of any type in 2009-10 (although figures were not broken down).

Provision for families is much less common among private providers, with just one respondent out of 27 offering provision for dependants of any age. Family accommodation represents then just 0.3 per cent of provision in the private sector. This is a marked reduction on the position in 2009-10 when 17 per cent of private providers had family accommodation of some form (although again, this drop may be a result of a shifting sample). What remains clear, however, is that this is not an area of the market that private providers seem interested in catering for, possibly because of the lower rental yields.

Demand for this accommodation type is likely to vary from institution to institution and many students with dependants will not require accommodation (particularly if they are studying at their local institution¹³). Notwithstanding these considerations, it is likely that current levels of provision are not meeting demand. Student parents, particularly those from outside the UK, are more likely to seek institutional or purpose-built accommodation for the duration of their course than most groups of students. This is often because of a lack of affordable and suitable accommodation in the broader private rented sector¹⁴. Undersupply for this sub-sector therefore affects both new and returning students with dependants.

Previous NUS research has suggested that the availability of suitable accommodation is a critical factor in the experience of student parents who relocate for their studies, particularly those who are also international¹⁵. Through regular assessment of the level of demand for these types of accommodation, institutions will put themselves in a better position to meet the need adequately.

The way things are going

The overall conclusion can be drawn that variety within student accommodation is being maintained, albeit within the slow increase of ensuite cluster flats and the development of more expensive studio flats. There is some evidence that as new student accommodation is being developed, both institutions and developers are recognising the need to provide a variety of types of accommodation and are not simply replicating the here's-one-we-did-earlier ensuite self-catering cluster flat for five or six students. Until this recent shift in understanding, there was in danger that this would become (as it has for some institutions) the only thing on offer.

Generally, the private sector is offering greater choice in the more expensive 'high end' accommodation by developing studio flats. Meanwhile education institutions are maintaining some catered accommodation, have grown their studio stock and have also developed some twin rooms.

There are signs that many institutions are now having an internal debate about how they can build further range into their portfolio. Part of this has to do with a new or revived desire to house returning students, for whom they will need to provide decent social spaces within flats, if this option is to be genuinely attractive to returners. It will be interesting to see whether these considerations bear fruit or whether the march towards a unitary ensuite option prevails.

Providers

The balance between institutionally and privately provided accommodation

The survey has been tracking the growth of private sector student accommodation for ten years. In 2003-04 nearly all purpose-built student accommodation was institutionally owned and managed (96 per cent)¹⁶, the small remainder resting in private hands.

By 2006-07 the proportion of accommodation provided by private operators had risen significantly from 4 per cent to 19 per cent. Many had expected this shift

towards the private sector to continue apace but by 2009-10 institutionally owned and managed provision had conceded just 3 per cent more in the balance of supply. There was some comment at the time on the slow-down in new private developments reflecting the events of 2008 and the lack of loan funding. There was also speculation that education institutions (either directly themselves or in partnership with others) would turn out to be the main engine of growth in the future.

However, the current survey round points up a dramatic swing: in 2012-13 the private sector now forms 39 per cent of supply (up from 22 per cent three years ago). Private sector supply has picked up speed while education institutions have retrenched.¹⁷

The reasons behind recent growth in privately provided supply

There are two main reasons for the shift in the balance of provision:

- most of the private sector developments which were in the pipeline by 2008 experienced a temporary delay as financing was restructured, but almost all buildings that were planned have now been built
- many private sector developments in London have been involved in planning considerations spanning several years – some of them have taken four or five years to begin building and these have entered the market in the last two.

Both reasons reflect issues of timing in bringing developments on line. However, other, more fundamental changes have taken place since 2008 and these have to do with the ways in which student accommodation is funded and developed.

There has been a major shift in the private sector from bank funding towards private equity or investment house funding. Pension funds and private investment funds have taken over as the big investors in student accommodation, and although funding from these sources may be paired with some bank funding, in the newer developments bank gearing is necessarily low.

Funding for new student accommodation developments has been available because of a general view among investors that the yields from what is now almost a separate asset class outperform yields in other commercial property sectors.¹⁸

Several new student accommodation developers have grown out of bespoke funds being put together. Expansion in this sub-sector has been rapid. Knightsbridge Student Housing and the Mansion Group are prominent examples, each growing to provide over 5,000 bed spaces within three years of being established.

This change has also altered both the nature and pattern of expansion in the private sector:

- some growth has come about through education institutions either selling their accommodation to private operators or entering into a variety of long-term partnership arrangements for the provision and refurbishment of student accommodation
- the 'new kids on the block' have bought up a considerable amount of existing stock, some from smaller developers and some from larger established providers, as the sector has restructured and rationalised
- most newer operators have developed accommodation free of any institutional link and have simply targeted areas where they thought there was demand for their product
- the proliferation of smaller investment funds has resulted in a significant growth of specialist property managers for those funds: most notable amongst these is CRM, which has emerged over the last three years as the largest specialist company, now managing over 9,000 bed spaces.

Previously, growth in the private sector was driven by a small number of large owner-manager players (Unite, Opal, Liberty Living and Victoria Halls), who had a fairly fixed view of their product level and consumer. Most of these older and larger players have been hampered since 2008 by previous loan gearing or by illiquidity in the capital markets.

Most new growth has come from relatively new suppliers who have been less concerned about making links with education institutions (although all are keen to pick up such links for obvious reasons) and more with basing their investment decisions on their view of the market.

These changes are reflected in the falling proportion of bed spaces which are wrapped into formal nomination agreements between private suppliers and education institutions (ie where the institution markets and nominates a private building directly to its students). Although the number of these bed spaces has increased year on year as a proportion of the overall market, nominated accommodation has slipped back. Whereas it accounted for 12 per cent of the market in 2009-10¹⁹, it currently represents 9 per cent²⁰ of the supply of purpose-built student accommodation.

This survey shows that most of the identified growth in the private sector took place between 2009-12. Only 2,027 additional bed spaces entered the market in 2012-13. It is tempting to suggest, as some have, that this slow-down reflects greater market caution in an environment where the effects of new restrictions on

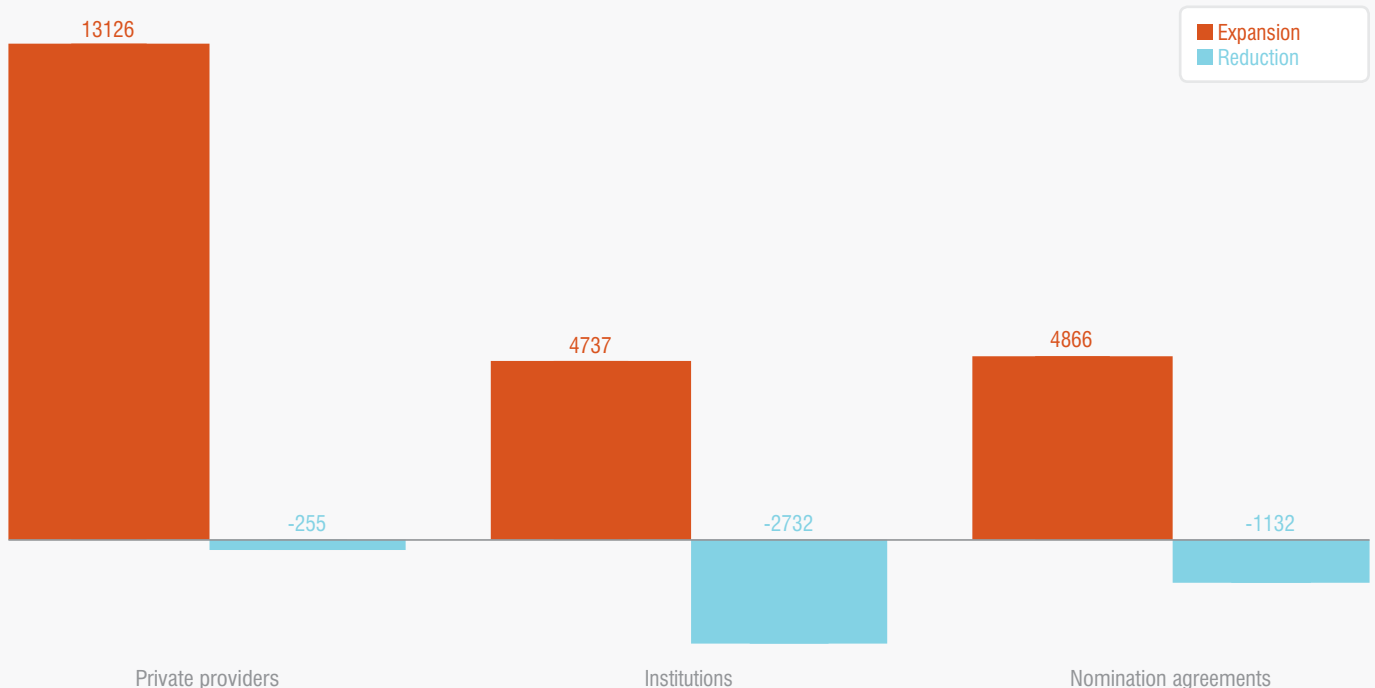
student intakes and the introduction of higher tuition fees have been unknown. However, those seeking to make this link have misunderstood the extent of lead-in times for developments to be designed, planned, funded and built. Although current market uncertainties will play out over the next few years, they are unlikely to have had any effect at this stage.

Future growth and change

Growth in the supply of student accommodation is continuing, despite the decline in the number of undergraduates for the 2012-13 intake (56,600 fewer acceptances (-12 per cent)²¹. This survey identifies that in 2013-14 22,729 additional purpose-built bed spaces are due to come on line while only 4,122 have been earmarked for decommissioning. This represents a net increase of 18,607. Private providers account for 79 per cent of these new bed spaces; 58 per cent will be directly let into the market; and 21 per cent will be covered by nominations agreements.

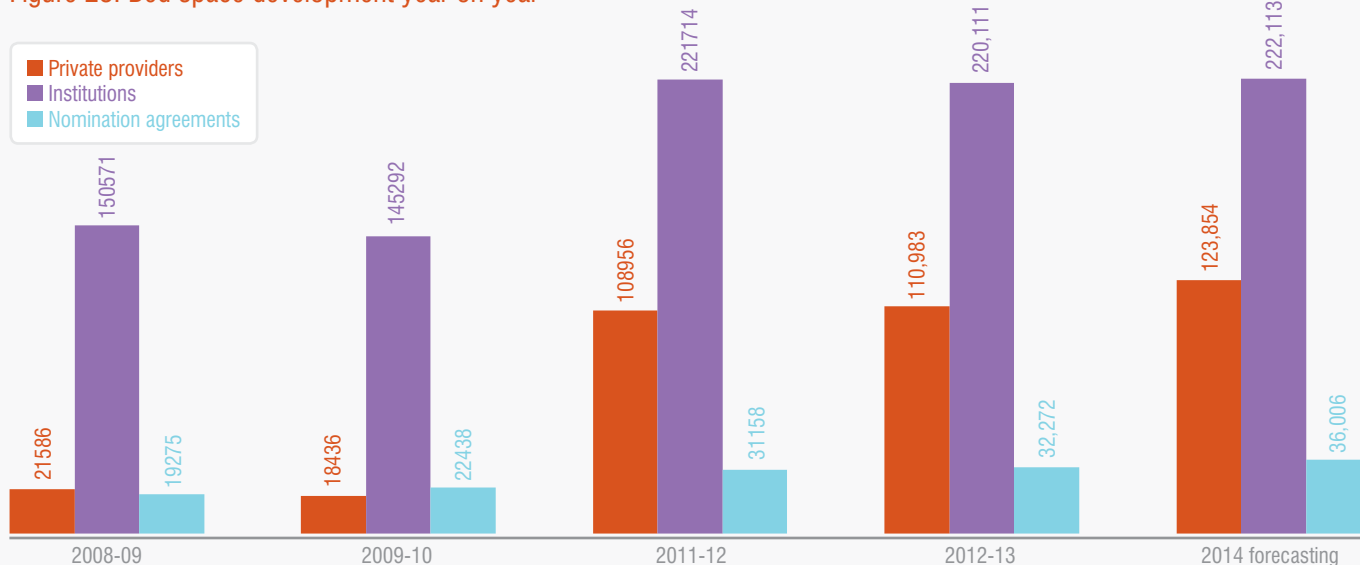
The proportion of private sector supply is already poised to increase from 39 per cent in 2012-13 to 42 per cent next year, 2013-14.

Figure 22: Development plans for expansion/reduction in 2013-14



While 4,866 new bed spaces under nomination arrangements are due to come on line for 2013-14, 1,132 are due to leave such arrangements. The effect of this is that bed spaces within nomination agreements remain at 9 per cent of an expanded market. It is also likely that a number of nomination arrangements (sometimes undertaken on short-term agreements) will end this or next year. This would mark a 'drawing back' by institutions from their housing supply commitments to third parties, and it follows a significant downturn in demand for the housing of Year 1 students in 2012-13.

Figure 23: Bed space development year on year



Implications

The private sector is now driving over three-quarters of all growth in the purpose-built student accommodation sector. Most of this is not linked to working in partnership with education institutions. Growth is also being driven more by relatively new companies and funds and less by the larger and older private providers. Risk to private providers must be increasing, as they are developing accommodation very much on their own terms, from their own assessment of the market and are then committed to letting the property themselves (or via an agent) directly into the market.

The market will be much more focussed on selling rooms than was previously the case – although the downturn in demand from first-year and international students in 2012-13 will have spurred on all suppliers (including education institutions) in this area.

Risk is increasing for private developments. In the private sector the supply of accommodation without the 'safety net' provided by an institutional link is growing. As it does, the risk for private developers increases. This is likely to lead to intensifying competition not only through marketing and branding but also through amenity level and price. The current intake and letting round has already seen significant discounting by some private providers, as a response to the missing Year 1 students. The business plans of developers who failed to take proper account of likely raised void rates and who anticipate ever rising rent levels may well come under stress over the next few years.

Other significant developments shaping the product

Accreditation

The National Codes

Almost all institutions and private providers recognise the importance of voluntarily agreeing to a set of standards and being held accountable to such an agreement through accreditation. There are three government-approved codes and together they account for over 404,000 of the estimated 450,000 purpose-built bed spaces in the sector²². Of these, 67 per cent relate to institutionally provided accommodation but the code designed specifically for private suppliers covers 133,000 bed spaces (33 per cent).²³

At a time when the sector's expansion is increasingly driven by private providers and when many of the new developments are being undertaken by relatively new companies, it has never been more important for education institutions to partner only those private providers who have gained ANUK Unipol accredited status by passing a thorough audit. There is some evidence that this advice, underlined by UUK at the inception of the codes, is not always heeded.

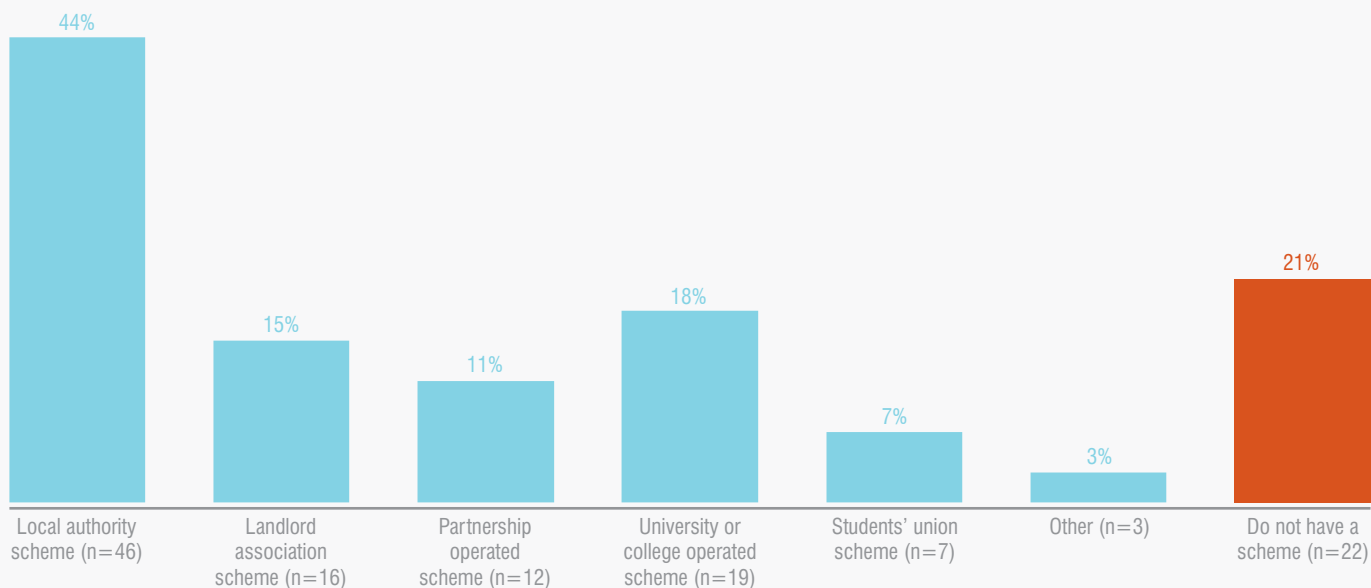
Shared student housing

The largest proportion of students (35 per cent) continues to live in the private rented sector in shared housing (often Houses in Multiple Occupation). There is, however, some evidence to suggest that in larger cities, students are beginning to live in greater numbers in purpose-built accommodation. A concomitant of this is some level of decline in numbers living in shared houses.²⁴

It is important that education institutions and their students' unions maintain a commitment to the accreditation of shared housing. In 2009-10 it was pleasing to be able to report that 48 per cent of institutions were working with an accreditation scheme which acknowledged their wider commitment to housing standards.

By 2012-13 there appeared to have been continued progress: only 21 per cent of institutional respondents stated that they did not have access to any accreditation scheme. However, the more detailed figures reveal that only 39 per cent of institutions (or their students' unions) are actually involved in helping to run a student-specific scheme. (Forty-four per cent of institutions say they took part in a general local authority scheme.) The Accreditation Network UK (ANUK) has reported that many local authority schemes have been – or are being – cut back, or cut altogether. In the wider context of national and local government retrenchment, local authorities are reverting to a de minimis policy position where they maintain only their statutory obligations. As a result, many local authority schemes are in stasis.

Figure 24: Institution area accreditation scheme for private rented housing for students



It is important now more than ever that education institutions and their students' unions get involved directly in the accreditation of shared student houses as part of improving the student experience. As many markets move into surplus, signalling to students what to rent and what not to rent through accreditation badging is a major market driver in improving housing standards for students.²⁵

It is likely that the figures obscure the emerging picture that many local authority schemes are faltering, and institutions and their students' unions should get involved themselves. In recent years there have been some good news stories which show what can be achieved: in Canterbury, the students' union is taking over the local authority scheme with continuing partnership working. A similar initiative is under way at Hertfordshire University. There are good schemes in Leeds, Nottingham and Bradford (run by Unipol) and in Liverpool and Lancaster. In all cases both the education institution and its students' union are involved as partners.

It is hoped that, where they have been previously relying on their local authorities, institutions will realise that their scheme is under threat or may not work effectively and that they should accept the important role which it is

theirs to play in strengthening accreditation in their town or city.

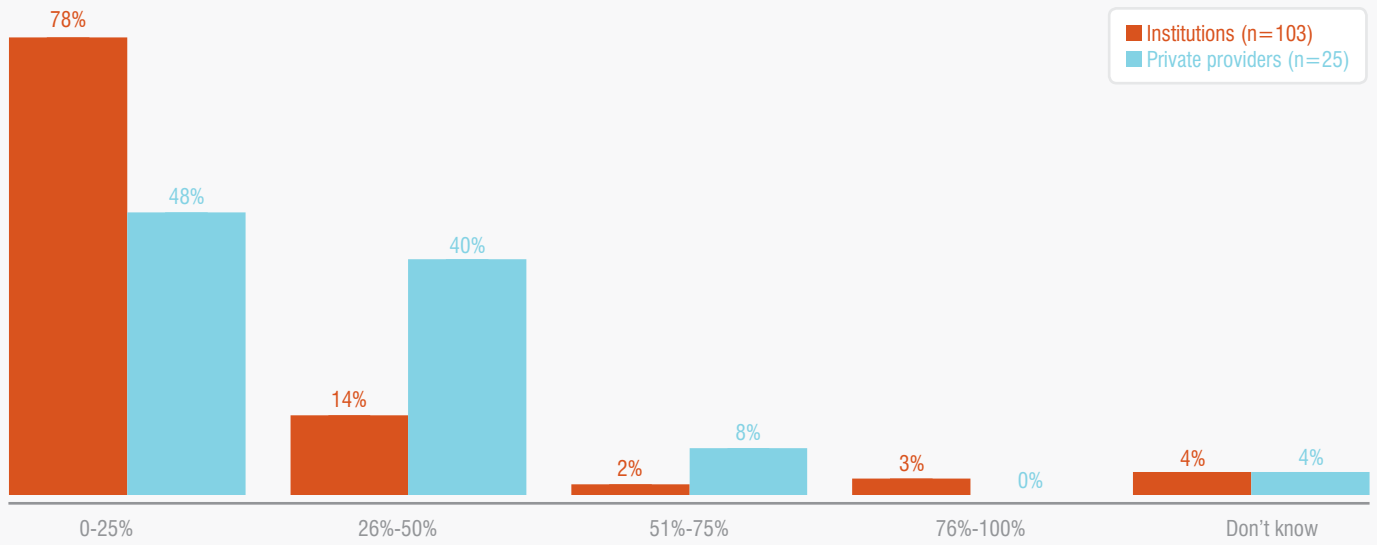
Returning students

As student accommodation provision grows and intakes contract (at least for 2012-13), returning students must be seen as an increasingly important part of the market.

Analysis of the early figures on the proportion of accommodation taken up by returning students points to the immediate conclusion that most purpose-built student accommodation still relies heavily on first-year intake: 78 per cent of institutional accommodation houses not more than 25 per cent of returners. The parallel figure for private providers is 48 per cent.

Private providers clearly accommodate a greater number of returners: 40 per cent let 26-50 per cent of their stock to returners (compared with only 14 per cent of education institutions) and a further 8% house between 51-75 per cent.

Figure 25: Proportion of accommodation that is taken up by returning students



As the supply of accommodation grows and first-year numbers remain static at best, returners will increasingly be targeted by both private and education providers in their efforts to fill their buildings. In order to achieve sustainable occupancy levels, they will need to compete effectively with the shared student housing sector.

Marketisation, affordability and the uncertain future

Marketisation and affordability

One of the most striking findings of this year's survey is that some of the biggest increases in rent levels between 2009-10 and 2012-13 are among the most common and most affordable room types: self-catering ensembles and self-catering singles. As has been mentioned earlier, increases in rent levels between 2009-10 and 2011-12 have been very significant at around 20 per cent, and it is education institutions that have raised rents the most. Over the ten years from 2001-2 to 2011-12, the average weekly rent levels charged by institutions have doubled from an average of £59.77 a week to £117.67.

These steep increases in weekly rent levels have taken institutional pricing up to within 1 per cent of the levels set either by private providers or through nomination agreements.

It seems reasonable to conclude that rents are being set according to what constitutes 'market rates'. The particular leap in rents charged by institutions between 2009-10 and 2011-12 coincided with impending changes to the higher education funding system. It suggests that some institutions are looking to increase rents as a means of subsidising other functions during a period of financial restraint.

As they move towards greater economic stringency, institutions have considered a number of policy options on student accommodation. These tend to focus on three areas:

- holding students to their contractual obligation to pay rent if they leave a course and need to leave their accommodation
- reducing service levels in areas such as cleaning and security in student accommodation
- engaging in what some have called 'aggressive rent setting'

Not only have the cheaper rooms got more expensive but there are fewer of them. In 2009-10 self-catering single and ensuite accommodation made up 77 per cent of institutional bed spaces. By 2011-12 this figure

had declined to 74 per cent and the balance continued to shift towards ensembles, the more expensive of the two options. Self-catering non-ensuite single rooms now represent just 31 per cent of the accommodation offered by institutions, down from 37 per cent only three years ago.

The combined impact of falling supply and rising rents for accommodation at the lower cost end of institutional portfolios must be carefully considered. The range and affordability of accommodation for students with limited financial means must be of particular concern. There may also be an impact on student mobility as a lack of adequate and reasonably priced provision may lead some young students to remain in their family home rather than relocating.

UUK statistics have indicated that the proportion of students living with parents increased dramatically from 12 per cent in 1995-96 to 20 per cent in 2004-05²⁶. More recently NUS research has suggested that this figure may now be as high as 27 per cent among English domiciled students (although it must be noted that this is a self-selecting sample)²⁷. It does, however, seem possible that the conjunction of increasing fee levels, increasing living costs and static maintenance loans may cause more students to choose to live at home if this is an option for them, as they try to minimise the debt they incur during their studies.

The uncertain future

As rents rise, in a period of general and particularly student austerity, there are real risks associated with assuming that rents will go on rising at their previous pace. There are a number of threats to that assumption:

- aggressive rent setting at institutions places them directly in competition with private providers who, as we have seen in 2012, are capable of rapidly lowering their rents if rooms go unlet. If institutions are to play the game of raising rents to match the private sector, they must also accept that in areas of surplus, rents can go down as well as up

- it would be easy for institutions to lose sight of what they are actually selling students in letting their own accommodation. The non-monetary value of institutions' historic monopoly on providing pastoral care, support, security and sociability is increasingly being challenged by other providers: they are either beginning to offer these additional services themselves or marketing on amenity-led provision – better design, bigger rooms, more technology
- if education institutions start to look like private suppliers, they stand to lose at least some of the market advantage which has traditionally come from student perceptions of the security that attaches to renting directly from an education institution. If this happens, students will bypass the accommodation office and rent directly from a supplier. There is evidence that this is already happening in London, Leeds and Manchester, where institutional accommodation offices have experienced declining demand amongst first-year students
- average rents in off-street shared houses in the private rented sector are now lagging significantly behind purpose-built accommodation prices, at £68.70 per week²⁸. It is possible that more first-year students could turn to this form of accommodation if they are unable to afford the purpose-built offering. Some international students, for whom price is a key factor in the reckoning, already choose this option.

The impact of this increasingly competitive environment is difficult to predict, particularly given that the number of student acceptances for 2012-13 entry is reported to be 56,600 down (-12 per cent).²⁹

New students still represent the core market for purpose-built accommodation (see Figure 25). Although many private providers and education institutions plan to increase their returning student residents, one effect of this will be to bring all accommodation suppliers directly into competition with each other. As a result the relationship between

the institutions and the private providers is likely to get more tense.

When planning new developments over the coming years, institutions will do well to give proper consideration to the market appropriateness of accommodation type and its place within the spectrum of choice offered to students. Although there is clearly demand for higher specification accommodation among some groups of students, it is important that institutions give due weight to student choice, internal measures of accommodation satisfaction and student demographics before deciding to develop predominantly at the top end of the portfolio. It is easy to decommission older, cheaper accommodation and replace it with much more expensive accommodation until affordability for some students becomes a real problem.

A joined-up approach to student access and widening participation is recommended to ensure that accommodation cost is not a prohibitive factor in access to higher education or in student mobility.

Some institutions have been trying to mitigate adverse trends in affordability by offering accommodation cost waivers to students from lower income backgrounds. But this should not be considered a solution to a lack of affordable options. Support is often not available to all students who meet eligibility criteria:

- because of the constraints of the National Scholarship Programme (NSP)
- because students struggling to meet higher accommodation costs are now not just the students with the lowest incomes
- because international students, who fall beyond the scope of support under the NSP, are likely to be more cost-sensitive than their home student counterparts³⁰

The fall in student numbers for 2012-13 has thrown a number of these issues into sharp focus.

Education institutions have a lot of empty rooms; the private sector, in a similar position, have discounted rents to fill theirs. Already accommodation suppliers

are girding themselves for what is likely to be the heaviest year of marketing ever, as competition for returning students and stayers intensifies. Rent setting for next year (2013-14) will be critical in this competitive environment and those who misread the market they have helped to stoke will end up with rooms left empty. The previous cosy co-operation and talk of partnership between different accommodation suppliers are likely to come under strain.

Data tables

Table 1: Average weekly rent by category of accommodation

Institution	2006-07	2008-09	2009-10	2011-12	2012-13	Actual increase / decrease 2011-12 to 2012-13	Actual increase / decrease 2006-07 to 2012-13	Real Percent Increase 2008-09 to 2012-13
Self-catering single	£69.00	£74.68	£78.84	£95.30	£97.08	1.87%	40.69%	16%
Self-catering ensuite	£86.00	£95.88	£101.64	£118.85	£122.81	3.33%	42.80%	15%
Studio flat single	£110.00	£118.50	£130.47	£153.60	£134.40	-12.50%	22.18%	1%
Studio flat double	£110.00	£127.63	£136.93	£153.16	£138.95	-9.28%	26.31%	-3%
Full board single	£105.00	£109.89	£114.29	£132.99	£143.82	8.15%	36.97%	17%
Full board ensuite	£128.00	£135.49	£146.73	£165.18	£171.72	3.96%	34.15%	13%
Full board double or twin rooms		-	-	£127.15	£133.33	4.87%		
Full board double or twin rooms ensuite		-	-	£144.56	£135.94	-5.96%		
Part board single	£90.00	£101.78	£105.94	£124.68	£121.56	-2.50%	35.07%	7%
Part board ensuite	£120.00	£113.54	£118.38	£136.62	£141.82	3.81%	18.18%	11.7%
Part board double or twin rooms		-	-	£102.00	£102.60	0.59%		
Part board double or twin rooms ensuite		-	-	£132.00	£117.27	-11.16%		
Houses	£76.00	£110.03	£108.91	£113.41	£115.00	1.40%	51.32%	-7%
Flats	£82.00	£119.81	£126.12	£104.80	£104.93	0.12%	27.96%	-22%
Self-catering twin		-	-	£100.43	£99.62	-0.80%		
Self-catering ensuite twin		-	-	£108.56	£110.80	2.07%		
Other				£89.31	£91.54	2.50%		
Houses	£76.00	£110.03	£108.91	£113.41	£115.00	1.40%	51.32%	-7%
Flats	£82.00	£119.81	£126.12	£104.80	£104.93	0.12%	27.96%	-22%
Self-catering twin		-	-	£100.43	£99.62	-0.80%		
Self-catering ensuite twin		-	-	£108.56	£110.80	2.07%		
Other				£89.31	£91.54	2.50%		

Table 1 (continued): Average weekly rent by category of accommodation

Nomination	2006-07	2008-09	2009-10	2011-12	2012-13	Actual increase / decrease 2011-12 to 2012-13	Actual increase / decrease 2006-07 to 2012-13	Real Percent Increase 2008-09 to 2012-13
Self-catering single	77	£76.40	£84.02	£90.78	£97.05	6.92%	26.04%	14%
Self-catering ensuite	86	£95.64	£103.37	£110.07	£119.99	9.01%	39.53%	12%
Studio flat single		£130.67	£147.74	£155.82	£160.58	3.06%		10%
Studio flat double		£137.17	£179.25	£120.54	£132.33	9.79%		-14%
Part board single		-	-	£114.27	£118.30	3.53%		
Part board double or twin rooms		-	-	£153.83	£135.67	-11.80%		
Houses		-	-	£110.80	£94.00	-15.16%		
Flats		-	-	£111.62	£112.55	0.83%		
Self-catering twin		-	-	£132.13	£133.98	1.41%		
Self-catering ensuite twin		-	-	£166.46	£163.10	-2.02%		
Private providers	2006-07	2008-09	2009-10	2011-12	2012-13	Actual increase / decrease 2011-12 to 2012-13	Actual increase / decrease 2006-07 to 2012-13	Real Percent Increase 2008-09 to 2012-13
Self-catering single	71	£76.07	£85.57	£97.95	£98.31	0.37%	38.47%	16%
Self-catering ensuite	80	£100.29	£104.50	£118.74	£122.33	3.02%	52.91%	9%
Studio flat single	114	£121.83	£128.45	£175.14	£188.09	7.39%	64.99%	38%
Studio flat double	114	£142.26	£143.92	£189.85	£157.43	-17.08%	38.09%	-1%
Full board single		-	-	£194.00	£136.17	-29.81%		
Full board ensuite		-	-		£159.00			
Full board double or twin rooms		-	-	-	£96.00			
Part board single		-	-	£140.00	£148.00	5.71%		
Part board double or twin rooms		-	-	£211.00	£222.00	5.21%		
Houses		-	-	£88.50	£85.60	-3.28%		
Flats		-	-	£136.30	£139.33	2.22%		
Self-catering ensuite twin		-	-	£77.50	£82.00	5.81%		

Table 2: Average weekly rent by region

Region	2008-09	2009-10	2011-12	2012-13
Institution				
East Midlands	£105.08	£108.35	£110.47	£113.71
East of England	£89.05	£92.62	£136.86	£143.57
London	£124.16	£129.65	£139.82	£135.70
North East	£90.38	£97.21	£110.83	£113.32
North West	£76.49	£80.38	£97.06	£103.29
Northern Ireland	£63.20	£67.62	£81.40	£84.57
Scotland	£93.71	£101.13	£111.57	£115.49
South East	£104.40	£108.98	£114.22	£116.50
South West	£101.96	£107.48	£118.59	£124.66
Wales	£79.92	£81.53	£90.13	£94.34
West Midlands	£90.55	£93.65	£103.47	£106.77
Yorkshire	-	-	£112.60	£115.75
Nomination				
East Midlands	-	-	£113.84	£120.16
East of England	£89.00	£95.75	£125.75	£142.17
London	£148.78	£163.68	£156.32	£167.29
North East	£86.11	£84.80	£101.43	£118.57
North West	£89.02	£91.32	£92.25	£92.09
Northern Ireland	-	-	-	-
Scotland	£77.42	£87.33	£108.12	£124.00
South East	£92.25	£100.88	£121.00	£117.00
South West	£95.98	£106.57	£134.90	£116.19
Wales	£72.22	£77.00	£106.53	£110.80
West Midlands	£85.00	£95.25	£130.25	£134.43
Yorkshire	-	-	£97.04	£102.74
Private providers				
East Midlands	£87.11	£89.04	£107.86	£112.10
East of England	£77.67	£110.00	£111.56	£119.64
London	£175.22	£167.91	£211.30	£220.97
North East	£94.01	£99.52	£107.76	£111.45
North West	£91.96	£105.03	£115.63	£120.83
Northern Ireland	-	-	-	-
Scotland	-	£135.33	£141.36	£139.61
South East	£80.50	£84.50	£134.97	£134.47
South West	£103.84	£117.50	£124.11	£127.22
Wales	-	-	£99.25	£103.60
West Midlands	£97.58	£103.71	£111.81	£115.05
Yorkshire	-	-	£103.70	£104.90

Table 3: Number of bed spaces by category of accommodation

Institution	2008-09	2009-10	2011-12	2012-13*
Self-catering single	55,580	51,531	71,598	67,750
Self-catering ensuite	61,164	58,725	94,535	95,669
Studio flat single	907	990	2,506	5,364
Studio flat double	515	393	502	956
Full board single	13,893	13,665	17,325	15,821
Full board ensuite	5,990	6,852	6,862	6,220
Full board double or twin rooms	-	-	1,746	1,274
Full board double or twin rooms ensuite	-	-	947	1,468
Part board single	5,083	4,132	4,482	4,388
Part board ensuite	1,177	1,167	2,489	3,027
Part board double or twin rooms	-	-	490	461
Part board double or twin rooms ensuite	-	-	72	701
Houses	2,309	2,622	4,773	5,745
Flats	3,953	5,215	11,012	8,805
Self-catering twin	-	-	1624	1,961
Self-catering ensuite twin	-	-	537	278
Other			214	223
Total	150,571	145,292	221,714	220,111
Nomination agreements and Private Providers combined	2008-09	2009-10	2011-12	2012-13
Self-catering single	8,507	9,109	29,103	18,036
Self-catering ensuite	30,480	30,070	94,621	105,983
Studio flat single	1,391	1,286	7,947	9,542
Studio flat double	483	409	477	397
Full board single			138	881
Full board ensuite				130
Full board double or twin rooms				14
Part board single			93	93
Part board double or twin rooms			29	31
Houses			455	621
Flats			6,792	7,059
Self-catering twin			452	463
Self-catering ensuite twin			7	5
Total	40,861	40,874	140,114	143,255

* Numbers decreased between the two years due to some respondents only completing the 2011-12 survey, rather than due to shrinkage of the sector

Table 4: Number of bed spaces by region

Region	2008-09	2009-10	2011-12	2012-13
Institution				
East Midlands	12,856	12,542	15,514	18,054
East of England	8,221	4,732	14,927	14,079
London	15,773	17,439	40,613	33,750
North East	16,314	15,688	15,774	15,874
North West	17,227	16,727	19,399	20,814
Northern Ireland	2,332	2,341	4,331	4,588
Scotland	14,041	14,120	16,739	15,355
South East	26,360	23,363	27,635	31,145
South West	17,052	17,338	17,055	17,482
Wales	12,038	8,927	9,429	9,392
West Midlands	6,055	9,773	20,261	21,234
Yorkshire			20,037	18,344
Nomination				
East Midlands	1,594	2,001	9,553	9,085
East of England	182	285	623	936
London	1,894	2,774	1,899	4,274
North East	4,269	4,870	1,790	1,743
North West	6,471	6,693	1,209	1,247
Northern Ireland	-	-	-	-
Scotland	591	667	1,729	180
South East	1,473	1,528	1,284	254
South West	1,978	2,092	2,884	2,724
Wales	741	741	3,566	3,474
West Midlands	82	787	1,496	1,238
Yorkshire	-	-	5,125	7,117
Private providers				
East Midlands	6,680	3,466	18,010	17,883
East of England	370	87	3,335	2,837
London	2,754	2,574	14,808	15,627
North East	3,193	3,193	3,128	3,129
North West	2,984	3,226	17,461	17,448
Northern Ireland	-	-		
Scotland	91	91	5,401	5,925
South East	608	608	4,405	7,896
South West	2,531	2,781	11,701	12,235
Wales	-	-	3,043	3,043
West Midlands	2,209	2,143	8,369	8,357
Yorkshire	-	-	19,295	16,603

Table 5: Average length of contract by category of accommodation

Provision	Category	2008-09	2009-10	2011-12	2012-13
Institution	Self-catering single	40	39	41	41
	Self-catering ensuite	40	40	41	41
	Studio flat single	40	44	43	42
	Studio flat double	40	43	44	45
	Full board single	37	37	37	37
	Full board ensuite	36	36	37	37
	Full board double or twin rooms	-	-	34	35
	Full board double or twin rooms ensuite	-	-	34	33
	Part board single	38	38	37	38
	Part board ensuite	37	37	39	40
	Part board double or twin rooms	-	-	37	35
	Part board double or twin rooms ensuite	-	-	37	38
	Houses	44	45	44	45
	Flats	46	45	43	42
	Self-catering twin	-	-	41	38
	Self-catering ensuite twin	-	-	35	32
	Other			42	42
Nominations	Self-catering single	43	42	44	44
	Self-catering ensuite	43	43	45	44
	Studio flat single	44	44	45	44
	Studio flat double	46	44	44	44
	Part board single	-	-	44	44
	Part board double or twin rooms	-	-	44	42
	Houses	-	-	44	44
	Flats	-	-	45	44
	Self-catering twin	-	-	46	44
	Self-catering ensuite twin	-	-	44	44
Private Providers	Self-catering single	44	44	43	43
	Self-catering ensuite	44	44	44	44
	Studio flat single	46	47	46	47
	Studio flat double	48	49	48	48
	Full board single	-	-	21	37
	Full board ensuite	-	-	-	40
	Full board double or twin rooms	-	-	-	40
	Part board single	-	-	52	52
	Part board double or twin rooms	-	-	52	52
	Houses	-	-	45	45
	Flats	-	-	46	46
	Self-catering ensuite twin	-	-	44	44

Table 6: Average length of contract by region (number of weeks)

Region	2008-09	2009-10	2011-12	2012-13
Institution				
East Midlands	38	38	40	40
East of England	40	41	46	46
London	41	41	41	40
North East	42	42	41	42
North West	41	41	42	42
Northern Ireland	37	37	38	38
Scotland	40	40	40	39
South East	39	39	41	41
South West	40	40	41	41
Wales	40	40	42	42
West Midlands	39	39	39	39
Yorkshire	-	-	40	41
Nomination				
East Midlands	40	40	46	46
East of England	42	44	48	47
London	45	44	45	43
North East	43	42	43	43
North West	42	43	42	42
Northern Ireland	-	-		
Scotland	36	42	52	42
South East	48	45	47	41
South West	43	43	43	41
Wales	44	44	43	44
West Midlands	38	42	44	45
Yorkshire	-	-	43	43
Private providers				
East Midlands	43	42	45	45
East of England	42	42	48	48
London	44	45	48	48
North East	44	44	44	44
North West	45	46	44	43
Northern Ireland	-	-	-	-
Scotland	-	48	43	45
South East	44	44	43	43
South West	47	47	43	44
Wales	-	-	43	43
West Midlands	45	45	44	45
Yorkshire	-	-	45	45

Table 7: Rent inclusion by category of room

Category	2008-09			2009-10		
	Internet	Energy	Insurance	Internet	Energy	Insurance
Institution						
Self-catering single	77%	98%	56%	78%	99%	64%
Self-catering ensuite	85%	98%	58%	86%	98%	65%
Studio flat single	75%	95%	58%	88%	94%	69%
Studio flat double	89%	90%	79%	93%	86%	86%
Full board single	84%	100%	68%	94%	100%	75%
Full board ensuite	75%	100%	92%	90%	100%	100%
Full board double or twin rooms	-	-	-	-	-	-
Full board double or twin rooms ensuite	-	-	-	-	-	-
Part board single	83%	100%	46%	78%	100%	60%
Part board ensuite	88%	100%	50%	83%	100%	67%
Part board double or twin rooms	-	-	-	-	-	-
Part board double or twin rooms ensuite	-	-	-	-	-	-
Houses	42%	55%	55%	63%	59%	56%
Flats	67%	59%	60%	69%	63%	71%
Self-catering twin	-	-	-	-	-	-
Self-catering ensuite twin	-	-	-	-	-	-
Other						
Nominations						
Self-catering single	64%	100%	63%	75%	100%	70%
Self-catering ensuite	63%	95%	64%	76%	95%	64%
Studio flat single	72%	91%	73%	100%	100%	78%
Studio flat double	50%	75%	75%	100%	100%	100%
Part board single	-	-	-	-	-	-
Part board double or twin rooms	-	-	-	-	-	-
Houses	-	-	-	-	-	-
Flats	-	-	-	-	-	-
Self-catering twin	-	-	-	-	-	-
Self-catering ensuite twin	-	-	-	-	-	-
Private providers						
Self-catering single	48%	77%	65%	52%	65%	59%
Self-catering ensuite	74%	95%	89%	88%	94%	86%
Studio flat single	70%	95%	95%	71%	94%	94%
Studio flat double	72%	92%	91%	73%	91%	91%
Full board single	-	-	-	-	-	-
Full board ensuite	-	-	-	-	-	-
Full board double or twin rooms	-	-	-	-	-	-
Part board single	-	-	-	-	-	-
Part board double or twin rooms	-	-	-	-	-	-
Houses	-	-	-	-	-	-
Flats	-	-	-	-	-	-
Self-catering ensuite twin	-	-	-	-	-	-

2011-12					2012-13				
Internet	Wi-Fi	Energy	Insurance	Parking	Internet	Wi-Fi	Energy	Insurance	Parking
73%	30%	97%	85%	18%	73%	45%	99%	85%	15%
87%	30%	97%	85%	13%	84%	47%	97%	85%	13%
85%	38%	97%	82%	6%	83%	48%	98%	78%	9%
62%	46%	95%	95%	32%	76%	49%	100%	81%	19%
94%	27%	93%	71%	13%	92%	62%	92%	65%	13%
95%	41%	85%	67%	24%	99%	76%	83%	65%	21%
83%	58%	95%	53%	13%	90%	61%	94%	39%	16%
100%	31%	85%	38%	46%	94%	56%	88%	50%	19%
89%	38%	100%	86%	19%	88%	25%	100%	69%	22%
96%	23%	100%	73%	35%	89%	25%	100%	68%	39%
100%	40%	100%	87%	7%	100%	0%	100%	30%	20%
100%	71%	100%	100%	0%	100%	9%	100%	82%	0%
77%	34%	73%	54%	43%	78%	76%	80%	61%	44%
77%	29%	91%	97%	39%	77%	61%	92%	95%	30%
75%	39%	96%	93%	0%	79%	21%	97%	86%	0%
89%	22%	67%	78%	22%	80%	80%	40%	80%	40%
100%	0%	100%	100%	0%	100%	50%	100%	100%	0%
2011-12					2012-13				
Internet	Wi-Fi	Energy	Insurance	Parking	Internet	Wi-Fi	Energy	Insurance	Parking
82%	18%	94%	51%	9%	78%	57%	93%	55%	9%
83%	23%	99%	67%	10%	75%	46%	97%	63%	4%
74%	23%	100%	77%	3%	67%	42%	100%	67%	0%
62%	8%	100%	38%	8%	75%	25%	100%	33%	8%
100%	0%	100%	100%	0%	100%	100%	100%	100%	0%
100%	0%	100%	100%	0%	100%	50%	100%	100%	0%
60%	80%	100%	100%	40%	100%	100%	100%	100%	0%
88%	13%	100%	100%	25%	89%	70%	100%	100%	33%
100%	0%	100%	100%	0%	100%	67%	100%	100%	0%
100%	0%	100%	100%	0%	100%	100%	100%	100%	0%
2011-12					2012-13				
Internet	Wi-Fi	Energy	Insurance	Parking	Internet	Wi-Fi	Energy	Insurance	Parking
87%	8%	91%	89%	7%	89%	32%	89%	87%	7%
91%	11%	100%	95%	0%	93%	27%	99%	96%	1%
90%	14%	96%	95%	2%	89%	32%	96%	95%	1%
82%	18%	100%	98%	2%	74%	48%	100%	97%	3%
100%	100%	100%	0%	0%	100%	17%	100%	83%	0%
-	-	-	-	-	100%	0%	100%	100%	0%
-	-	-	-	-	100%	0%	100%	100%	0%
100%	100%	100%	0%	0%	100%	100%	100%	0%	0%
100%	100%	100%	0%	0%	100%	100%	100%	0%	0%
50%	0%	100%	100%	0%	80%	20%	100%	80%	80%
79%	15%	97%	88%	3%	97%	37%	97%	83%	17%
100%	0%	100%	100%	0%	100%	100%	100%	100%	0%

About the survey

Survey context

The accommodation costs survey has been undertaken by the National Union of Students periodically since 1980. NUS has undertaken this work in collaboration with Unipol Student Homes, and used its commercial arm, NUS Services Ltd, to carry out the primary research.

As for earlier surveys, research in the 2012-13 round was conducted into purpose-built accommodation across the UK to understand:

- the profile of the sector
- the cost of accommodation to students
- contract lengths
- additional costs
- regional variation in cost
- reasons for cost variances
- the type and balance of accommodation provided

An online survey was conducted between July and September 2012.

In total there were valid responses from 114 institutions, 34 nomination agreement providers and 32 private providers. Unipol and the NUS promoted the survey nationally and targeted promotion at institutions, private providers and directly with students' unions. This sample represents 361, 828 bed spaces for 2011-12, and 363,366 for 2012-13. The sample sizes reflect the student accommodation strata and a cross-section of regions and the different providers.

Type of provider

In this survey, we again chose to distinguish institutional, nomination and private provider accommodation.

'Institutional' is accommodation which is covered by the ANUK Code for Larger Developments

for Student Accommodation Managed by Educational Establishments or the UUK Code of Practice for University-managed Student Accommodation, or accommodation owned and managed by the institution.

'Nomination' was described as accommodation under agreement with third-party suppliers, not covered by either the ANUK or UUK Code definitions above. (The provider may be a member of the ANUK Code of Standards for Larger Developments for Student Accommodation not Managed and Controlled by Educational Establishments.)

'Private' was described as accommodation owned and managed by a non-educational provider, and likely to be signed up to the ANUK Code for Larger Accommodation (non-educational).

Within the analysis, the forms of provision were combined in order to provide a general landscape of the student accommodation sector, but also, where appropriate, segmentation analysis has been performed to illustrate any pertinent disparities.

Accommodation categories

We understand that there may be differences in the way in which institutions and organisations categorise their accommodation. To help overcome this, the following definitions of the 17 categories have been used:

Self-catering single

Blocks of accommodation containing 15 or more students in which each student occupies a single study bedroom. Washing and toilet facilities are not provided within the room. Occupants share kitchen facilities in which they are expected to provide themselves with all meals.

Self-catering ensuite

Similar to the other self-catered categories except that there are washing and toilet facilities for the exclusive use of the occupant/s of the study bedroom. The occupant/s will be expected to provide all meals using a shared kitchen facility.

Studio flat single

A one-bed self-contained apartment or flat.

Studio flat double

A two-bed self-contained apartment or flat.

Full board single

One person occupies a study bedroom and at least two meals a day, for between five and seven days a week, are provided. Some may have access to a shared kitchen for the preparation of snacks.

Full board ensuite

Full board accommodation that includes either/or private shower/bathroom/WC.

Full board double or twin rooms

Two people occupy a study bedroom and at least two meals a day, for between five and seven days a week, are provided. Some may have access to a shared kitchen for the preparation of snacks.

Full board double or twin rooms ensuite

Same definition as 'full board double or twin rooms' but also includes either/or private shower/bathroom/WC.

Part board single

One person occupies a study bedroom and at least one meal a day, for between five and seven days a week, is provided. Some may have access to a shared kitchen for the preparation of snacks.

Part board ensuite

Same definition as 'part board single' but also includes either/or a private bathroom/shower/WC.

Part board double or twin rooms

Two people occupy a study bedroom and at least one meal a day, for between five and seven days a week, is provided. Some may have access to a shared kitchen for the preparation of snacks.

Part board double or twin rooms ensuite

Same definition as 'part board double or twin rooms' but also includes either/or a private bathroom/shower/WC.

Houses

A group of students, not exceeding 15, who occupy a house that belongs to the institution. They have exclusive use of the property and provide their own meals using a shared kitchen.

Flats

A group of students, not exceeding 15, who occupy a self-contained unit in which all facilities, including a communal living space, are shared. It differs from a house in that there is at least one other self-contained unit within the same block or complex.

Self-catering twin

Blocks of accommodation containing 15 or more students in which students occupy a twin study bedroom. Washing and toilet facilities are not provided within the room. Students share kitchen facilities in which they are expected to provide themselves with all meals.

Self-catering ensuite twin

Similar to the other self-catered categories except washing and toilet facilities are for the exclusive use of the occupant/s of the twin study bedroom. The occupant/s will be expected to provide all meals using a shared kitchen facility.

Other

This allowed for accommodation types that blurred the definitional constraints of the aforementioned categories.

Regional analysis

The regions were determined by the location of the provision, and were allocated in the analysis stage. They were as follows:

- East Midlands
- East of England

- London
- North East
- North West
- Northern Ireland
- Scotland
- South East
- South West
- Wales
- West Midlands
- Yorkshire

Calculations used

Actual percentage increase

(Latest rent – previous rent)/
previous rent = actual increase or
decrease

Average rent 2011-12 = A

Average rent 2012-13 = C

$C - A = E$

$(E / A) \times 100 =$ actual increase/
decrease

Real percentage increase

Year	2006	2007	2008	2009	2010	2011	2012*
RPI	198.11	206.58	214.83	213.68	223.56	235.18	240.26
Normalised RPI	1.0000	1.0428	1.0844	1.0786	1.1285	1.1871	1.1243
Calculation of normalised RPI		=2007 RPI / 2006 RPI	=2008 RPI / 2006 RPI	=2009 RPI / 2006 RPI	=2010 RPI / 2006 RPI	=2011 RPI / 2006 RPI	=2012 RPI / 2006 RPI
Formula for normalised rent figure			=2006 rent x 2008 normalised RPI	=2006 rent x 2009 normalised RPI	=2006 rent x 2010 normalised RPI	=2006 rent x 2011 normalised RPI	=2006 rent x 2012 normalised RPI
Relative % increase or decrease	=(actual rent-normalised rent)/normalised rent						

*provisional figures at time of year, according to Office for National Statistics (<http://www.ons.gov.uk/ons/index.html>)

Annual rent

For each variable, the average weekly rent was multiplied with the contract length to calculate their individual annual rent.

Abbreviations used

ANUK – Accreditation Network UK
 DCLG - Department for Communities and Local Government
 EPC – Energy Performance Certificate
 HESA – Higher Education Statistics Agency
 HMO – House in Multiple Occupation
 NSP - National Scholarship Programme
 NUS – National Union of Students
 UCAS – Universities & Colleges Admissions Service
 UKCISA – UK Council for International Student Affairs
 UUK – Universities UK

Schedule of respondents

Institutions	Private and charitable providers
Aberystwyth University	@184
Anglia Ruskin University	A2 Dominion Housing Group Ltd
Aston University	Campus Lifestyle (Teesside House) Ltd
Bangor University	Cass and Claredale Halls Of Residence Association Ltd
Bath Spa University	Chaucer College Canterbury (Shumei Eiko LTD)
Bishop Grosseteste University College	CRM Ltd
Brunel University	Derwent Living
Buckinghamshire New University	DIGS Student Accommodation
Canterbury Christ Church University	Fresh Student Living
Cardiff University	Goodenough College
City University London	Hamstead Campus Limited
Coventry University	HCR Ltd
Cranfield University	International Lutheran Student Centre
De Montfort University	iQ Letting Property Partnership
Durham University	iQ Student accomodation
Edinburgh Napier University	Kexgill Ltd
Goldsmiths, University of London	Liberty Living plc
Green Templeton College	Lutheran Council of GB
Grwp Llandrillo Menai	Niche Homes Ltd
Guildhall School of Music & Drama	Opal Property Group Ltd
Harper Adams University College	Paragon Notting Hill
Hull University	Paragon Notting Hill Student Lets
Imperial College London	Sanctuary Management Services
Keele University	South Street Asset Management Ltd
King's College London	South Street IM Ltd
Kingston University	Spectrum Housing Group
Lancaster University	Stanton Asset Management Ltd
Leeds College of Art	Student Housing Company
Leeds Metropolitan University	Towers Lettings & Property Management Ltd
Leeds Trinity University College	U Student (Sunderland) Ltd
Liverpool Hope University	Unipol Student Homes

Liverpool John Moores University	UNITE Group plc
London School of Economics and Political Science	University Partnerships Programme
London South Bank University	UPP Broadgate Park Ltd
Loughborough College	Urbanest UK Ltd
Manchester Metropolitan University	Victoria Hall Ltd
Newcastle University	Viridian Housing
Northumbria University	
Nottingham Trent University	
Oxford Brookes University	
Queen Mary and Westfield College	
Queen Mary, University of London	
Queen's University Belfast	
Ravensbourne College	
Regents' College	
Robert Gordon University, Aberdeen	
Roehampton University	
Royal Agricultural College	
Royal Holloway	
Royal Veterinary College	
Scottish Agricultural College	
Sheffield Hallam University	
Somerset College	
South Tyneside College	
Southampton Solent University	
St Chad's College - Durham University	
St Mary's University College, Twickenham	
Staffordshire University	
Swansea Metropolitan University	
Swansea University	
Teesside University	
The Arts University College Bournemouth	
The City University	
The Royal Veterinary College	
The University College Plymouth St Mark and St John	

Accommodation Costs Survey

The University of Buckingham	
The University of Central Lancashire (UCLan)	
The University of Salford	
The University of Sheffield	
The University of St Andrews	
The University of Strathclyde	
The University of Sunderland	
The University of Surrey	
The University of Sussex	
The University of Wales, Newport	
The University of Warwick	
The University of West London	
The University of Wolverhampton	
The University of Worcester	
The University of York	
University of Birmingham	
University Campus Suffolk	
University College Birmingham	
University College Birmingham	
University College Falmouth	
University for the Creative Arts	
University of Aberdeen	
University of Abertay Dundee	
University of Bath	
University of Birmingham	
University of Bradford	
University of Brighton	
University of Buckingham	
University of Cambridge	
University of Chichester	
University of Derby	
University of Durham	
University of Essex	
University of Exeter	

University of Glamorgan	
University of Glasgow	
University of Gloucester	
University of Gloucestershire	
University of Greenwich	
University of Hull	
University of Kent	
University of Leeds	
University of Leicester	
University of Lincoln	
University of Liverpool	
University of Manchester	
University of Newcastle	
University of Northumbria	
University of Nottingham	
University of Roehampton	
University of Salford	
University of Sheffield	
University of St Andrews	
University of Strathclyde	
University of Sunderland	
University of Surrey	
University of Sussex	
University of the Arts London	
University of the West of England, Bristol	
University of Ulster	
University of Wales, Newport	
University of Warwick	
University of Wolverhampton	
University of Worcester	
Warwickshire College	
York St John University	

Endnotes

- ¹ Sometimes, for the purposes of simpler analysis, those renting through a nomination arrangement and external private suppliers have been added together to enable simple comparisons between accommodation provided by institutions and accommodation provided by the private sector. This is made clear in each instance.
- ² Energy Performance Certificates for dwellings in the social and private rented sectors, DCLG <http://www.communities.gov.uk/documents/planningandbuilding/pdf/866773.pdf>
- ³ In many cases 'booking fees' do not actually book a room but just an option on a room which is only subsequently allocated
- ⁴ NUS/Endsleigh research cited in the Guardian (16 August 2012): <http://www.guardian.co.uk/uk/feedarticle/10394198>
- ⁵ Student experience report 2010-11, NUS/HSBC (2010), p88: <http://www.nus.org.uk/PageFiles/12238/NUS-HSBC-Experience-report-web.pdf>
- ⁶ *ibid*
- ⁷ Student experience research, NUS (2012), p9 http://www.nus.org.uk/PageFiles/12238/2012_NUS_QAA_First_Year.pdf
- ⁸ Pound in your pocket, NUS (forthcoming)
- ⁹ Based on an average contract length of 39.3 weeks and weekly rental cost of £81.18 according to the 2006-07 Accommodation Costs Survey http://www.cusu.cam.ac.uk/campaigns/fair/2006-7/NUS_Accommodation_Survey_final.pdf
- ¹⁰ Accommodation Costs Survey, NUS (2009), p36
- ¹¹ Campus housing, Education USA, from <http://www.4uth.gov.ua/usa/english/educ/edusa/predepar/housing/campus.htm>
- ¹² In particular the Disability Discrimination Act 1995 (as amended by the Disability Discrimination Act 2005) and the Equality Act 2010
- ¹³ The forthcoming NUS Pound in your pocket research (op cit) suggests that just 1 per cent of English domiciled students are currently living in institution-owned accommodation.
- ¹⁴ Managing accommodation for international students UKCISA, p69 http://www.ukcisa.org.uk/files/pdf/about/material_media/accommodation_guide.pdf
- ¹⁵ Meet the parents, NUS (2008), p16 http://www.nus.org.uk/PageFiles/12238/NUS_SP_report_web.pdf
- ¹⁶ Accommodation Costs Survey, NUS (2002), p8
- ¹⁷ Although representative of the market, each successive survey is reliant on participant suppliers, which can change between surveys. The three government-approved codes of practice provide useful back-up data to confirm changes that surveys identify as having taken place. In 2009-10 the ANUK/Unipol Code for Larger Developments for student accommodation not managed and controlled by educational establishments showed private provision at 29 per cent and by 2012-13 this has grown to 33 per cent. Because of the way the codes work, where a tenancy agreement is signed with the institution (through a nomination arrangement), this is not included in this figure but is counted in the institutionally provided accommodation category).
- ¹⁸ Spotlight on student housing, Savills (summer 2012)
- ¹⁹ out of a total of 186,166 bed spaces surveyed
- ²⁰ out of a total of 363,366 bed spaces surveyed
- ²¹ Interim assessment of UCAS acceptances, UCAS (20 September 2012) http://www.ucas.ac.uk/about_us/media_enquiries/media_releases/2012/20121409

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- ²² Student housing market overview, GVA Grimley (summer 2011)
- ²³ Details of each code can be obtained from <http://www.nationalcode.org> and <http://www.thesac.org.uk>
- ²⁴ Assessment of housing market conditions and demand trends in Inner North West Leeds, re'new/Unipol (August 2012)
- ²⁵ The private rented sector: its contribution and potential, Julie Rugg and David Rhodes, Centre for Housing Policy, University of York 2008, p66.
- ²⁶ Patterns of higher education institutions in the UK (sixth report), UUK (2006): <http://www.universitiesuk.ac.uk/Publications/Documents/patterns6.pdf> p. 65
- ²⁷ NUS (forthcoming), op cit
- ²⁸ <http://media.accommodationforstudents.com/>
- ²⁹ UCAS (20 September 2012), op cit
- ³⁰ 30 Managing accommodation for international students: a handbook for practitioners, UKCISA (2010)

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