

**Wandsworth Purpose-Built Student Accommodation Needs Assessment**

Report Findings

February 2026

RESI Consultancy, Franklins House, Wesley Lane, Bicester, Oxfordshire, OX266JU ©Copyright  
February 2026

The below copyrights acknowledge the open-source data that is provided by the respective  
bodies and is used throughout this document

Contains National Statistics data © Crown copyright and database right 2024

Contains public sector information licensed under the Open Government Licence v3.0

# Table of Contents

1. Executive Summary.....	4
2. Policy Context.....	6
2.1. National Policy .....	6
2.2. London Plan Policy .....	7
2.3. Wandsworth Local Plan Policy .....	8
3. Assessing future demand for PBSA.....	10
4. RESI Consultancy approach to modelling PBSA need .....	12
5. Student populations within commutable distance from Wandsworth .....	13
5.1. Higher Education Providers within commutable distance from Wandsworth .....	13
5.2. Student Populations within commutable Higher Education Providers .....	15
6. PBSA supply in Wandsworth.....	18
7. PBSA needs analysis for commutable Higher Education Providers from Wandsworth.....	20
8. PBSA pipeline in Wandsworth.....	22
9. Estimating future PBSA need in Wandsworth .....	23
9.1. PBSA per Capita of Borough Population .....	23
9.2. PBSA per Weighted Commutable Student Population .....	26
10. Limitations and Assumptions.....	29
10.1. Key Assumptions .....	29
10.2. Data and Methodological Limitations.....	29
10.3. Policy .....	30
11. Conclusions .....	31
11.1. Summary of Findings .....	31
11.2. Recommendations .....	32
Appendix A: Glossary .....	34
Appendix B: Student Population Growth.....	36
Appendix C: Higher Education Identification .....	41
Appendix D: PBSA Pipeline.....	43

# 1. Executive Summary

This report provides an assessment of the need for Purpose-Built Student Accommodation (PBSA) in the London Borough of Wandsworth. It has been prepared to support the borough's planning evidence base and to inform policy and decision-making in relation to PBSA.

The National Planning Policy Framework (NPPF, December 2024) affirms the importance of planning for the housing needs of specific groups, including students. At the regional level, the London Plan (2021) recognises the need for additional PBSA across the capital in order to support London's higher education sector and reduce pressure on the wider private rented sector. The London Plan does not set borough-specific PBSA targets. Wandsworth's Local Plan Partial Review (2023-2038), adopted in March 2026, updated the local plan policy on PBSA. While the new policy supports PBSA development in principle, it requires developments to make a contribution towards C3 affordable housing. PBSA proposals are also required to evidence that there is need for additional student bedspaces in the borough. The new policy does not include a defined target for the delivery of additional student bedspaces.

In this context, this report provides an evidence-based assessment of Wandsworth's current PBSA provision and its potential role in supporting student accommodation needs within the wider London higher education market. The analysis considers student populations at Higher Education Providers (HEPs) located within a reasonable commuting distance of the borough, recognising that student housing demand in London operates across borough boundaries rather than being confined to the borough in which institutions are located.

Using Higher Education Statistics Agency (HESA) data and projected student population growth, the study estimates that the total Full-Time Student (FTS) population within a 45-minute commute of Wandsworth is approximately 196,828 students in 2025, rising to 253,471 students by 2041. Based on current accommodation patterns and PBSA provision levels, the modelling identifies a total student accommodation needs gap of 12,952 bedspaces in 2025, increasing to 26,556 bedspaces by 2041 across the wider commutable study area.

These figures represent the aggregate shortfall across the full study area serving the identified Higher Education Providers, rather than the requirement for Wandsworth alone. As such, the report applies two allocation methodologies to assess what proportion of this wider need could reasonably be accommodated within the borough. These approaches consider both Wandsworth's population share and the proportion of commutable student populations accessible from the borough. The analysis then compares these allocations with Wandsworth's existing PBSA supply and current development pipeline in order to assess whether the borough is likely to meet its proportionate contribution to student accommodation provision over the short and long term.

The findings indicate that Wandsworth already plays an important role in supporting the wider London student housing system due to its strong public transport connectivity and proximity to several major Higher Education Providers. The borough currently accommodates 3,849 PBSA bedspaces, with additional schemes in the development pipeline that would increase total provision by 1,196 if delivered.

Across both methodologies used to estimate PBSA need, Wandsworth's current PBSA development pipeline of 1,196 bedspaces is broadly sufficient to meet the borough's proportionate contribution to student accommodation provision through to 2041. In the short term, delivery of the pipeline would exceed the borough's estimated requirement in 2025 by 824 bedspaces under the Population-based approach and by 760 bedspaces under the Weighted FTS approach. Looking to 2041, the modelling indicates that overall PBSA provision in Wandsworth would remain close to the borough's proportionate requirement under both methodologies. Under the Population-based approach, the pipeline would exceed the recommended Needs Gap allocation by 91 bedspaces, bringing provision close to the projected long-term requirement. Under the Weighted FTS approach, the pipeline would fall marginally short of the recommended allocation by 39 bedspaces, indicating a modest level of under-provision relative to that methodology.

Taken together, the findings indicate that Wandsworth is broadly aligned with its proportional role within the wider London student housing market. While the borough may experience a short-term surplus relative to the modelled 2025 requirement, the existing pipeline largely addresses the longer-term needs identified through both allocation methodologies.

Overall, the evidence presented in this report provides a robust basis for understanding Wandsworth's position within the wider student housing market and supports a balanced planning approach that enables appropriate PBSA delivery while continuing to manage impacts on local communities and the wider housing market.

## 2. Policy Context

This report assesses the need for PBSA in the London Borough of Wandsworth in the context of evolving national and regional planning policy. The most recent National Planning Policy Framework (NPPF, December 2024)<sup>1</sup> affirms the Government’s commitment to boosting housing delivery, including for students. The London Plan 2021 (Greater London Authority, 2021) identifies a need for 3,500 new PBSA bedspaces annually to meet student demand, supported by affordability and location criteria. This PBSA Needs Assessment evaluates Wandsworth’s current provision and potential to support the wider regional demand, drawing on student population data from Higher Education Providers (HEPs) within a 45-minute commute, and is intended to inform local policy aligned with the London Plan (2021) targets that were set based on the London Strategic Housing Market Assessment (SHMA, 2017)<sup>2</sup>.

### 2.1. National Policy

The Government’s most recent National Planning Policy Framework (NPPF) (published 12th December 2024, amended 7th February 2025) includes reforms to accelerate housing development and the reintroduction of housing targets for local authorities. The NPPF includes students as one of the groups whose housing needs should be addressed by local planning policies, to ensure sufficient supply.

This continues the historical approach of previous NPPFs, which recognise students as a group with “specific housing needs” but without specifying student-specific policies or targets. Instead, responsibility is delegated to Local Planning Authorities to identify local needs and set policy in local and regional plans.

The Planning Practical Guidance (PPG) on Housing needs of different groups (2019)<sup>3</sup> states that “Strategic policy-making authorities need to plan for sufficient student accommodation whether it consists of communal halls of residence or self-contained dwellings, and whether or not it is on campus. Encouraging more dedicated student accommodation may provide low cost housing that takes pressure off the private rented sector and increases the overall housing stock. Strategic policy-making authorities are encouraged to consider options which would support both the needs of the student population as well as local residents before imposing caps or restrictions on students living outside university-provided accommodation. Local Planning Authorities will also need to engage with universities and other higher educational

---

<sup>1</sup> Ministry of Housing, Communities and Local Government (2024). [National Planning Policy Framework, December 2024](#)

<sup>2</sup> Greater London Authority (2017). [London Strategic Housing Market Assessment](#)

<sup>3</sup> Ministry of Housing, Communities and Local Government (2019). [Planning Practice Guidance \(PPG\): Housing Needs of Different Groups, Paragraph 004 \(Reference ID: 67-004-20190722\)](#)

establishments to ensure they understand their student accommodation requirements in their area.” (Paragraph 004, Reference ID: 67-004-20190722).

## 2.2. London Plan Policy

The London Plan (Policy H15 Purpose-built student accommodation) estimates that London requires at least 3,500 new PBSA bedspaces annually over the plan period to meet demand. It mandates a minimum of 35% (or 50% where required by Part B of Policy H5 Threshold approach to applications) of these rooms be offered as affordable student accommodation, defined as not exceeding 55% of the maximum student maintenance loan. This equates to approximately £188 per week for the 2023/24 academic year (based on a 38-week tenancy).

The PBSA targets in the London Plan (2021) were established by the London SHMA (2017) which estimated a gross need for 171,000 PBSA bedspaces by 2041, with existing provision around 83,000 bedspaces in 2016. This indicates a net requirement for 88,000 additional bedspaces between 2016 and 2041, averaging 3,500 bedspaces per year. This is London-wide and does not provide recommended targets for specific boroughs. As a result, the approvals and completions of student bedspaces across London have been uneven during the London Plan period, with some boroughs absorbing significantly more PBSA demand than others.

It is important to note, however, that there is increasing evidence that a meaningful proportion of students, particularly postgraduate and international cohorts, are choosing to live in Build to Rent (BTR) and co-living schemes rather than PBSA. This reflects a preference among many postgraduate students for greater independence, flexible lease structures and professionally managed rental environments that more closely resemble the wider private rented sector. Analysis from PriceHubble<sup>4</sup> highlights that students form a notable share of BTR residents, and that the sector attracts younger renters and sharers in particular, reflecting the overlap between student and early-career rental demand. Indeed, around 31% of BTR residents are students of some form, demonstrating that the tenure is already absorbing a significant share of student housing demand. Consequently, assessing student accommodation needs solely through PBSA provision is no longer sufficient when considering planning policy and approvals. A more holistic view of the housing ecosystem is required, recognising that BTR, co-living and, in some circumstances, HMOs are increasingly part of the accommodation mix for students seeking flexibility and choice.

---

<sup>4</sup> Price Hubble and British Property Federation (2025). [Who lives in Build-to-Rent](#)

## 2.3. Wandsworth Local Plan Policy

Wandsworth Council undertook a partial review of its Local Plan (2023-2038) in 2025 to ensure the Council is maximising the delivery of genuinely affordable housing. The Wandsworth Local Plan Partial Review (WLPPR) updated six policies which directly supersede the policies of the same name and number from the Wandsworth Local Plan adopted in 2023. The review included an update to Policy LP28 (Purpose-Built Student Accommodation). The Council received the Inspector's Report on the soundness and legal compliance of the WLPPR on 20 February 2026 which confirmed that the Local Plan can be adopted, subject to modifications, and the Local Plan Partial Review was formally adopted at Full Council on 4 March 2026.

The updated Policy LP28 is provided below:

“LP28 Purpose-Built Student Accommodation

A. Proposals for Purpose-Built Student Accommodation will be supported where the development:

1. Would not compromise a site's capacity to meet the Borough's need for conventional dwellings;
2. Includes a financial contribution towards affordable housing equivalent to Local Plan Policy LP23 (Affordable Housing);
3. Includes affordable student housing provision as set out in London Plan Policy H15;
4. Is accompanied by a site management and maintenance plan which demonstrates that the accommodation will be managed and maintained over its lifetime so as to ensure an acceptable level of amenity and access to facilities for its occupiers, and would not give rise to unacceptable impacts on the amenities of existing residents in the neighbourhood, including outside of term times.
5. Has access to sufficient levels of public transport, and to shops, services and leisure facilities appropriate to the student population;
6. Can demonstrate a priority for meeting the accommodation needs firstly of recognised HEPs in Wandsworth, and then in neighbouring authorities or within a practical travelling distance from Wandsworth;
7. Would not result in an over-concentration of single-person accommodation at the neighbourhood level which may be detrimental to the balance and mix of uses in the area or place undue pressure on local infrastructure;
8. Can make facilities provided for student residents available to the wider community, where feasible, particularly where there is an acknowledged shortfall in such provision within the neighbourhood;
9. Provides a high-quality living environment, including the provision of adequate functional living spaces and layouts, well-integrated internal and external communal areas, and a high level of amenity (providing good levels of daylight and sunlight, and natural ventilation); and

10. Provides at least 10% of student rooms which are readily adaptable for occupation by wheelchair users.

B. The loss of existing student accommodation will be permitted when it is demonstrated that the facility no longer caters for current or future needs and:

1. The student accommodation would be replaced by another form of housing for which there is an identified need; or
2. The loss of student accommodation would be solely at ground floor level; and
  - a) The development would replace the ground floor student accommodation with appropriate active town centre uses as defined in the glossary; and
  - b) The proposed uses would pass the sequential test for main town centre uses in accordance with Policy LP43 (Out of Centre Development)."

### 3. Assessing future demand for PBSA

As part of a wider policy shift<sup>5</sup> intended to reduce net migration, the UK Government amended the Student Visa from 1 January 2024 to restrict the ability of international students to bring dependants to the UK. Under the revised rules, only students enrolled on postgraduate research programmes or eligible government-sponsored courses may be accompanied by dependants. Students undertaking undergraduate degrees or standard taught postgraduate courses are no longer permitted to bring partners or children under the Student Visa Route. These changes were introduced through a Statement of Changes to the Immigration Rules in mid-2023 and apply to students commencing courses on or after 1 January 2024. Official statistics indicate this policy change has already had a material effect. In the year ending June 2024, there were 94,253 visas issued to student dependants, 39% fewer than the previous year.<sup>6</sup> The reforms form part of a broader tightening of the Student Visa, including restrictions on switching to a Skilled Worker Visa before course completion and strengthened compliance requirements for sponsors.

More broadly, national education and skills policy is also changing in ways that may influence long-term student housing demand. Government policy is increasingly promoting alternative routes into employment, including apprenticeships and technical education pathways. Recent reforms aim to accelerate the development of new apprenticeship standards and expand access to vocational training aligned with labour market needs.

Alongside this shift in skills policy, demographic projections indicate that the number of 18-year-olds in the UK is expected to decline after 2030 following a period of growth during the 2020s. Some projections suggest that the 18-year-old population could fall by around 15–20% between 2030 and 2040. While changes in participation rates and international student recruitment may offset some of this decline, these trends highlight the importance of monitoring long-term demand assumptions within student accommodation planning.

In this context, planning for PBSA requires a balanced and evidence-based approach that considers both current student demand, the evolving policy and demographic environment.

At a national level, investment volumes demonstrate continued institutional confidence in the sector, with approximately £3.87 billion deployed into UK PBSA in 2024. However, operational performance in 2025 introduced a notable shift in market conditions. National PBSA occupancy fell by nearly 6 percent compared with the previous year, according to Sturents<sup>7</sup> recent

---

<sup>5</sup> UK Government (2023–24). [Explanatory memorandum to the statement of changes in immigration rules HC1496](#); Home Office (2024). [Immigration System Statistics, year ending June 2024](#)

<sup>6</sup> Home Office (2024). [Why do people come to the UK? To study](#)

<sup>7</sup> Sturents (2025). [Annual occupancy report](#)

occupancy report. After a prolonged period of near-full occupancy across many schemes, this decline represents a meaningful softening and signals increased volatility within the market.

This change does not suggest that structural demand has disappeared. Instead, it highlights a growing mismatch between supply and affordability. International student recruitment has become less predictable due to visa policy changes and geopolitical uncertainty. At the same time, domestic students face mounting cost-of-living pressures, with maintenance loans failing to keep pace with rental growth. A significant proportion of recent PBSA development has been positioned at the premium end of the market, where rents exceed what many students can realistically afford.

As a result, demand has become increasingly segmented. Affordable and mid-market schemes have generally remained more resilient, while higher-rent, amenity-led developments have experienced longer letting cycles, increased incentives, and greater exposure to fluctuations in international enrolment. The 2025 occupancy decline therefore reflects price sensitivity and product alignment rather than an absence of underlying need.

Looking ahead to 2030, projections indicate that existing and pipeline supply in London may meet only around 50 percent of core demand. However, the emerging challenge is no longer solely one of volume. It is increasingly one of tenure mix, price point and spatial alignment. Without a stronger focus on genuinely affordable PBSA, supported by coordinated borough-level planning and closer alignment with university growth strategies, London risks a bifurcated market characterised by persistent structural undersupply at the affordable end and cyclical softness in higher-priced segments.

In this context, boroughs play a critical role in supporting the delivery of PBSA across London. Student housing markets in the capital operate across borough boundaries, with students frequently living in different boroughs from the institutions they attend. Effective planning therefore requires consideration of commutable higher education catchments, rather than focusing solely on institutions located within borough boundaries.

## 4. RESI Consultancy approach to modelling PBSA need

This assessment seeks to identify an appropriate and balanced contribution of PBSA in Wandsworth to support HEPs within commutable distance of the borough and to help meet the need for 88,000 additional student beds identified by the London SHMA (2017).

This report uses two methodologies to estimate the potential allocation to commutable boroughs: PBSA per Capita of Borough Population and PBSA per Capita of Commutable Full-Time Student Population. Both methodologies use the following approach:

- Estimate the current and future student population that is within a commutable distance from Wandsworth
- Quantify the PBSA supply in Wandsworth
- Estimate PBSA need in Wandsworth
- Compare PBSA need to current pipeline in Wandsworth
- Recommend PBSA delivery for 2025 and 2041 in Wandsworth

The methodology seeks to align the allocation of the identified needs gap considering the following factors:

- Historic under provision: % shortfall
- Behavioural growth: Commute and accessibility weighting
- Strategic redistribution: Balance allocation on weighting and shortfall:
  - Boroughs further below target receive more of the PBSA needs gap.
  - Boroughs closer to target receive less of the PBSA needs gap.
  - No borough below target is ignored.
  - Larger deficits receive proportionately larger allocation.

PBSA supply is fully counted for each borough<sup>8</sup> including PBSA associated with HEPs outside the 45-minute scope.<sup>9</sup> Excluding this supply would understate total provision. Demand is restricted to students at HEPs within a 45-minute commute of Wandsworth. Commuting patterns are assumed to be broadly distributed, so the effect of PBSA serving out-of-scope HEPs is offset in the allocation. Shortfalls are calculated as the difference between total supply and in-scope demand, ensuring that only genuine under-provision is identified.

---

<sup>8</sup> Unless otherwise stated in the Limitations and Assumptions section of this report

<sup>9</sup> The London Plan (2021) notes that a 45-minute public transport commute or a 30-minute cycle is generally considered acceptable. In the Wandsworth context, the 30-minute cycling catchment does not include any additional higher education providers beyond those already captured by the 45-minute public transport threshold. While some destinations within the 45-minute public transport catchment may exceed 30 minutes by bicycle, the cycling benchmark remains a useful supplementary reference for sustainable travel considerations.

## 5. Student populations within commutable distance from Wandsworth

To assess the opportunities for students to commute to nearby HEPs from Wandsworth, a comprehensive review was undertaken to identify HEPs with main campuses that are commutable within 45 minutes from Wandsworth Town Station. This analysis identified 10 primary HEP campuses that collectively host a substantial student population. Using data from the Higher Education Statistics Agency on student enrolments by HEP<sup>10</sup> and growth projections, the analysis shows that the student population serviceable from Wandsworth is estimated at 196,828 in 2025, rising to 253,471 by 2041. Wandsworth already hosts nearly 4,000 PBSA beds, demonstrating that Wandsworth already makes a significant contribution to PBSA provision across the London-wide student population, serving HEPs both inside and outside the borough.

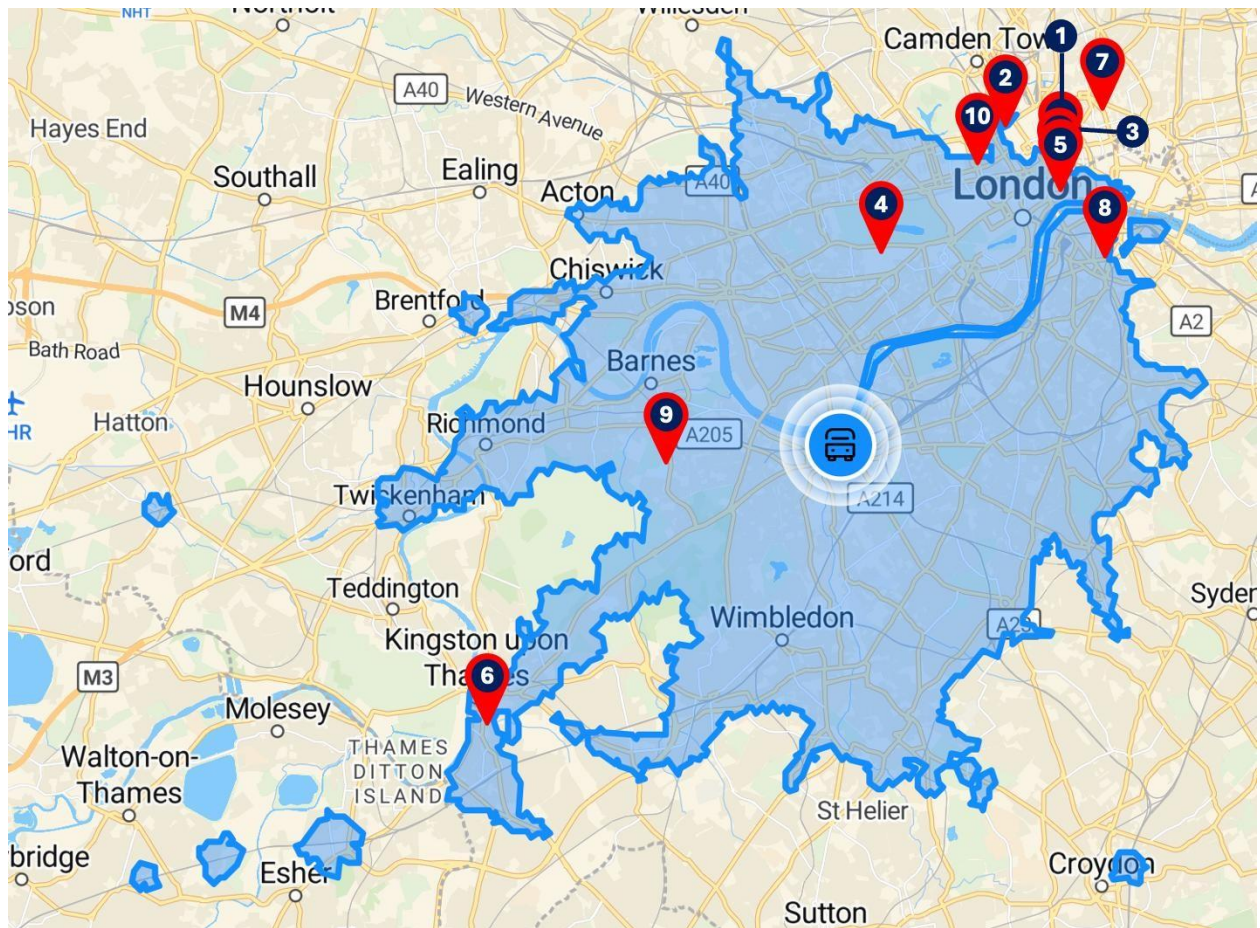
### 5.1. Higher Education Providers within commutable distance from Wandsworth

To identify the Higher Education Providers (HEPs) that could be serviced by PBSA in Wandsworth, a Higher Education Identification Review was completed which is contained in Appendix C: Higher Education Identification.

---

<sup>10</sup> Higher Education Statistics Agency (HESA). [Who's in HE: student enrolments by HE provider](#)

Figure 1 Areas commutable within 45 minutes of Wandsworth Town Station (TravelTime, 2026)<sup>11</sup>



The review identified 10 primary HEPs within a 45-minute commuting distance from Wandsworth Town Station (SW18 1AD) that could be serviced by PBSA in the borough. These are:

1. **University of the Arts London (UAL)** - UAL's campuses (such as Central Saint Martins, London College of Fashion) are generally accessible from Wandsworth within 40 minutes.
2. **University College London (UCL)** - UCL is within 35 minutes by public transport from Wandsworth.
3. **London School of Economics and Political Science (LSE)** - Typically reachable in under 45 minutes from Wandsworth via the tube and bus, LSE's campus is located in central London.

<sup>11</sup> TravelTime (2026). [TravelTime Map Tool](#). Isochrone mapping is indicative and subject to change depending on routing assumptions, service frequencies and real-time network conditions. Locations appearing marginally outside the mapped catchment have been verified as being within a 45-minute public transport journey using Google Maps journey time estimates and as per Appendix C: Higher Education Identification (checked February 2026).

4. **Imperial College London** - Particularly the smaller Charing Cross campus is accessible in about 40 minutes by bus from Wandsworth, however, Imperial College London does not provide a breakdown of student numbers by campus.
5. **King's College London** – The main campus (located at the Strand, WC2R 2LS) is generally accessible in under 40 minutes via public transport. King's College has several campuses across South London, all of which can be accessed from Wandsworth in under 45 minutes. This includes the Guy's campus which can be accessed in as little as 25 minutes.
6. **Kingston University** – On the South Western Railway line out of London, generally accessible within 45 minutes.
7. **St George's, University of London** - Located in Tooting, St George's is generally commutable in just over 30 minutes.
8. **London South Bank University (LSBU)** - Very close to central London, LSBU is accessible within 35 minutes from Wandsworth.
9. **University of Roehampton** - Located in the heart of Wandsworth, Roehampton University is highly accessible and will be within a 20-minute commute from most locations in the borough.
10. **University of Westminster** - Located in central London and easily reachable in under 40 minutes from Wandsworth.

## 5.2. Student Populations within commutable Higher Education Providers

Using HESA (2025) data, student enrolments at each of the commutable HEPs were modelled to produce forecasts through to 2041. These are total populations based on estimated domestic to international student ratios provided by the HEPs, where available. See Appendix B: Student Population for more information. Specific student population breakdowns by campus were not publicly available.

Table 1 uses HESA (2025) data for Full-Time Student Enrolments (FTS), which is only available up to the end of the 2024 academic year. Thus, the populations for 2025-2041 have been forecast. While a figure of 2.9% growth per year has been frequently cited in the media (i.e. the Savills<sup>12</sup> report *Spotlight: The Growth of the Education Sector in London & South East Office Market*), recent changes to student visas have negatively impacted HEP FTS growth rates. Recent sector data suggests that the UK's international student population, a significant component of overall demand for PBSA, declined in the 2024/25 academic year, with total international enrolments falling by around 6% year-on-year and marking a second consecutive annual decrease.

---

<sup>12</sup> Savills (2023). [\*Spotlight – The Growth of the Education Sector in London and the South East\*](#).

This downturn was particularly pronounced in postgraduate taught programmes, a key segment of international demand. It coincided with tighter visa restrictions, including the 2024 ban on dependants for most postgraduate visas, which is understood to have reduced the UK’s attractiveness as a study destination for some students and may have contributed to broader enrolment trends (AcademicJobs, 2025)<sup>13</sup>. While this aligns with observations that visa issuances for international students have also declined, reflecting policy shifts and broader market dynamics, no publicly available sector-wide data was identified that confirms specific growth strategies or recent enrolment trajectories for individual HEPs in Wandsworth beyond general national trends. Targeted evidence from universities themselves on future student number strategies would strengthen the analysis and help clarify whether local demand pressure might ease or persist. Therefore, Table 2 uses a 3-year average growth rate based on HESA (2025) data, split by domestic and international students.

*Table 1 Full-time student (FTS) enrolments student populations at commutable HEPs*

Higher Education Provider	2017	2018	2019	2020	2021	2022	2023	2024	2025	2041
University of Roehampton	9,630	11,050	11,365	11,105	11,255	11,165	11,630	11,175	11,328	14,099
University College London (UCL)	30,655	32,710	33,890	34,945	39,615	39,940	46,305	45,310	46,069	60,233
King's College London	24,095	25,570	26,635	27,640	31,570	34,040	33,510	32,265	32,763	41,969
University of the Arts London	17,340	18,190	18,395	19,355	20,475	21,840	23,020	22,175	22,537	29,274
Imperial College London	16,350	16,925	17,485	18,030	19,695	20,015	20,840	21,025	21,392	28,279
University of Westminster	15,115	14,720	14,920	15,750	17,080	17,760	17,925	18,340	18,606	23,479
Kingston University	16,395	14,980	14,380	15,780	16,345	17,750	16,560	16,455	16,684	20,846
London School of Economics	10,730	11,185	11,455	11,665	12,940	12,495	12,870	12,500	12,728	17,034
London South Bank University	10,515	9,920	10,040	10,815	12,560	12,830	11,935	11,225	11,377	14,120
St George's, University of London	3,000	3,220	3,365	3,355	3,520	3,480	3,300	3,300	3,344	4,138
<b>Total</b>	<b>153,825</b>	<b>158,470</b>	<b>161,930</b>	<b>168,440</b>	<b>185,055</b>	<b>191,315</b>	<b>197,895</b>	<b>193,770</b>	<b>196,828</b>	<b>253,471</b>
									Projections	

*Table 2 Estimating full-time student (FTS) growth rates at commutable HEPs*

Year	2021	2022	2023	2024	3 Year Average
Domestic FTS	111,116	115,238	117,586	115,108	
Domestic Growth %		3.71%	2.04%	-2.11%	1.21%
International FTS	75,960	78,099	82,332	80,686	
International Growth %		2.82%	5.42%	-2.00%	2.08%

<sup>13</sup> AcademicJobs (2025). *UK international student numbers fall for second year, especially in postgraduate programmes*

Extrapolating the forecasts from 2025 through to 2041 results in a domestic FTS population of 116,485 rising to 140,944 and an international FTS population of 82,368 rising to 114,568. The total commutable FTS population is therefore 196,828 in 2025 rising to 253,471 in 2041, representing approximately **1.59%** year on year growth.

Figure 2 Projected student populations at commutable HEPs

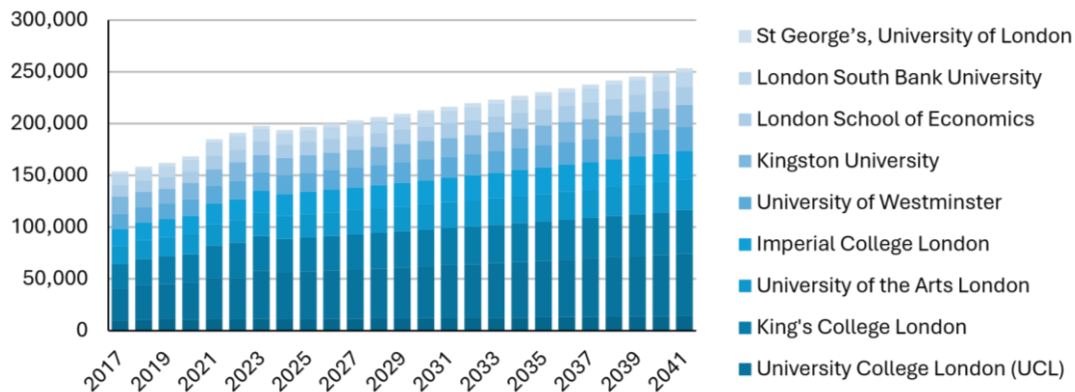


Table 3 provides an overview of whether HEPs that are within a 45-minute commutable distance from Wandsworth can also be serviced by other nearby local authorities.

Table 3 Commuting distances from neighbouring boroughs and home counties to HEPs within 45-minute commuting distance from Wandsworth

Borough	Postcode & Station Used	University of Roehampton	King's College London	London School of Economics	Imperial College London	University of Westminster	University of the Arts London	London South Bank University	St George's, University of Lond	University College London (UCI	Kingston University
Barking and Dagenham	IG11 7BS (Barking Station)	74	34	40	49	40	38	38	62	35	72
Barnet	EN5 4DZ (Barnet Station)	85	51	49	60	43	46	51	81	40	100
Brent	NW10 7NJ (Willesden Junction)	51	38	42	33	26	34	39	53	24	57
Camden	NW1 2DA (Euston Square Station)	52	25	24	31	13	22	31	44	1	52
City of London	EC2R 8DN (Bank Station)	46	11	14	27	12	10	12	33	18	46
Croydon	CR0 1NX (East Croydon Station)	45	36	41	36	33	41	36	45	39	45
Ealing	W5 5DB (Ealing Broadway Station)	53	41	36	34	23	34	41	60	30	70
Greenwich	SE10 9LS (Greenwich Station)	67	29	35	45	40	34	27	51	31	63
Hackney	E8 1HE (Hackney Central Station)	65	43	41	45	25	36	38	61	25	71
Hammersmith and Fulham	W6 7AL (Hammersmith Station)	34	26	33	19	30	30	39	48	23	61
Haringey	N8 8AA (Turnpike Lane Station)	78	39	35	46	34	32	47	67	32	76
Islington	N1 8AA (Angel Station)	70	28	26	40	24	23	22	43	18	68
Kensington and Chelsea	SW7 2AZ (South Kensington Station)	39	15	21	1	18	19	28	48	23	52
Kingston upon Thames	KT1 1EE (Kingston Station)	39	50	52	51	43	55	45	44	47	10
Lambeth	SW9 8BB (Brixton Station)	42	25	33	28	19	29	25	31	22	47
Merton	SM4 5QX (Morden Station)	49	38	43	48	36	41	31	17	36	48
Newham	E15 1BB (Stratford Station)	63	28	25	41	23	21	27	48	24	59
Richmond upon Thames	TW9 1DN (Richmond Station)	25	39	41	32	41	45	38	51	38	36
Southwark	SE1 8AA (London Bridge Station)	51	20	26	32	21	22	13	37	24	49
Sutton	SM1 1AA (Sutton Station)	59	50	56	51	47	57	41	47	51	53
Tower Hamlets	E1 6AN (Whitechapel Station)	57	14	20	30	20	24	26	50	16	72
Wandsworth	SW18 1AD (Wandsworth Town Station)	18	35	37	40	28	40	33	31	32	37
Westminster	W1H 7AF (Paddington Station)	44	25	24	17	12	21	27	48	10	60

## 6. PBSA supply in Wandsworth

Wandsworth currently hosts a total of 3,849 PBSA beds across 20 assets, out of which 16 are operated by Higher Education Providers, specifically the University of Roehampton and St George's Hospital Medical School, and 4 are privately operated. This is shown in Table 4 and 5 below. Just over 40% of the existing PBSA provision is privately operated, with notable assets including Urbanest Battersea and Griffon Studios. This mix reflects a strong institutional presence, supported by a growing private sector interest in student housing. Looking ahead, two significant PBSA developments, Watkin Jones' scheme in Nine Elms and Downing Students' proposal on Armoury Way, could increase capacity by a further 1,196 beds, potentially raising the borough's total PBSA provision to 5,045 beds. These additions would mark a shift in the current landscape, with private provision accounting for more than half of the borough's PBSA stock, indicating a broader trend towards private sector ownership and supply.

*Table 4 Current PBSA supply in Wandsworth*

PBSA	HEP/Operator	Ownership	Beds
Digby Stuart College - Bede House	University of Roehampton	HEP	108
Digby Stuart College - Newman House	University of Roehampton	HEP	51
Digby Stuart College - Shaw House	University of Roehampton	HEP	143
Elm Grove Hall	University of Roehampton	HEP	358
Froebel College - Aspen House	University of Roehampton	HEP	56
Froebel College - Chadwick Hall	University of Roehampton	HEP	210
Froebel College - Garden Court	University of Roehampton	HEP	40
Froebel College - Linden House	University of Roehampton	HEP	42
Froebel College - New Court	University of Roehampton	HEP	22
Froebel College - Old Court	University of Roehampton	HEP	15
Froebel College - Willow House	University of Roehampton	HEP	59
Southlands College - Aldersgate Court	University of Roehampton	HEP	216
Southlands College - Epworth Court	University of Roehampton	HEP	121
Southlands College - Wesley Hall	University of Roehampton	HEP	66
Whitelands College	University of Roehampton	HEP	304
Horton Halls	St George's Hospital Medical School	HEP	486
Urbanest Battersea	Urbanest	Private	852
Cedars Hall	Find Digs	Private	110
Griffon Studios	Gradpad	Private	566
Blain House	International Students House	Private	24

*Table 5 Current supply of university and private PBSA beds in Wandsworth*

<b>Provider</b>	<b>Beds</b>
University of Roehampton	1,811
St George's Hospital Medical School	486
Private PBSA	1,552
<b>Total</b>	<b>3,849</b>

## 7. PBSA needs analysis for commutable Higher Education Providers from Wandsworth

To calculate the PBSA needs gap, the review looked at all HEPs commutable within 45-minutes of Wandsworth identified in Section 3, and analysed the anticipated accommodation mix for 2025 and 2041. Assuming that no additional PBSA beds are delivered, the review assumes that 30% of students in commutable HEPs will keep living at home (as suggested in London Higher<sup>14</sup>, Save the Student<sup>15</sup>, and HEPI<sup>16</sup>); 24% of London's student population will be accommodated in PBSA (CBRE, 2025)<sup>17</sup>; and 46% of students are living in other privately rented accommodation (HMO, BtR, co-living, or traditional C3 rented accommodation). The summary of the PBSA needs gap for commutable HEPs from Wandsworth is shown in Table 6, Table 7, and Figure 3.

*Table 6 PBSA needs gap at commutable HEPs in 2025 (Black = surplus, Red = shortfall)*

HEP Name	Student Population	HEP beds	Living at Home	Privately rented sector	Private PBSA	Needs Gap
University of Roehampton	11,328	1,811	3,399	5,211	566	(341)
King's College London	32,763	4,625	9,829	15,071	270	(2,968)
London School of Economics	12,728	2,965	3,819	5,855	300	211
Imperial College London	21,392	3,148	6,418	9,841	780	(1,205)
University of Westminster	18,606	876	5,582	8,559	1,350	(2,239)
University of the Arts London	22,537	2,400	6,762	10,368	400	(2,607)
London South Bank University	11,377	1,338	3,414	5,234	2,000	609
St George's, University of London	3,344	486	1,004	1,539	-	(315)
University College London (UCL)	46,069	6,763	13,821	21,192	550	(3,743)
Kingston University	16,684	2,349	5,006	7,675	1,300	(354)
<b>Total</b>	<b>196,828</b>	<b>26,761</b>	<b>59,054</b>	<b>90,545</b>	<b>7,516</b>	<b>(12,952)</b>

*Table 7 PBSA needs gap at commutable HEPs in 2041 (Black = surplus, Red = shortfall)*

HEP Name	Student Population	HEP Beds	Living at Home	Privately rented sector	Private PBSA	Needs Gap
University of Roehampton	14,099	1,811	4,230	6,486	566	(1,007)
King's College London	41,969	4,625	12,591	19,306	270	(5,178)
London School of Economics	17,034	2,965	5,110	7,836	300	(823)
Imperial College London	28,279	3,148	8,484	13,008	780	(2,859)
University of Westminster	23,479	876	7,044	10,800	1,350	(3,409)
University of the Arts London	29,274	2,400	8,782	13,466	400	(4,226)
London South Bank University	14,120	1,338	4,236	6,495	2,000	(51)
St George's, University of London	4,138	486	1,241	1,903	-	(507)
University College London (UCL)	60,233	6,763	18,070	27,707	550	(7,143)
Kingston University	20,846	2,349	6,254	9,589	1,300	(1,354)
<b>Total</b>	<b>253,471</b>	<b>26,761</b>	<b>76,041</b>	<b>116,597</b>	<b>7,516</b>	<b>(26,556)</b>

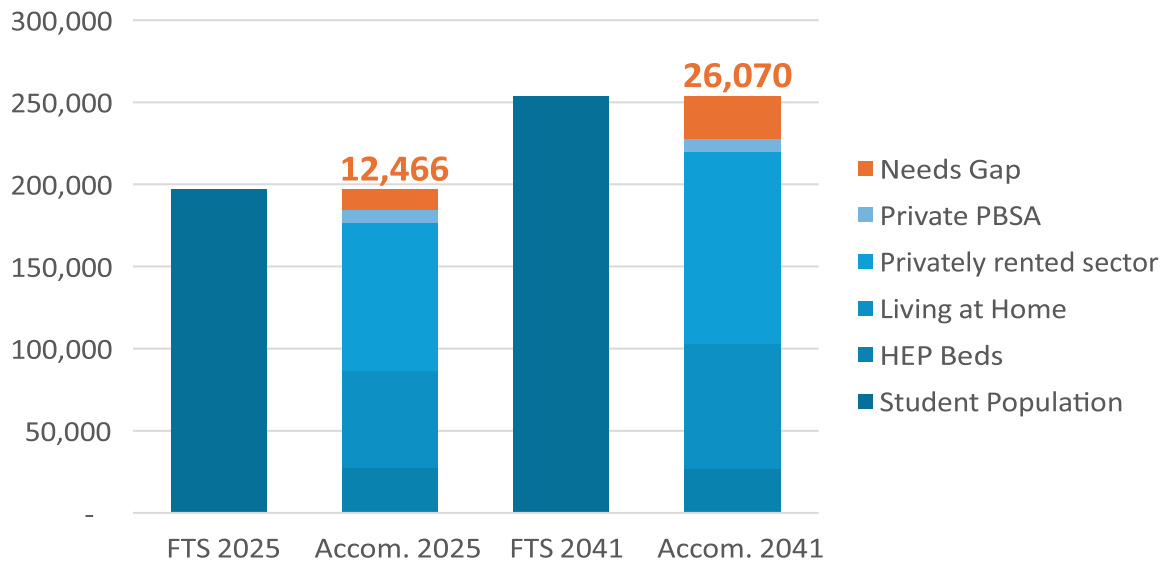
<sup>14</sup> London Higher (2024). *The London Plan and Purpose-Built Student Accommodation: Three Years On – Panacea for Growth or Painful Progress?*

<sup>15</sup> Save the Student (2023). *Student Money Survey 2023 Results*.

<sup>16</sup> Higher Education Policy Institute (HEPI) (2019). *Somewhere to Live: Why British students study away from home – and why it matters*

<sup>17</sup> CBRE (2025). *London Plan policy fails to deliver affordable student accommodation*

Figure 3 Commutable HEP PBSA needs gap projections



This analysis shows that if no further development of PBSA will take place between now and 2041, and the existing pipeline of PBSA approved development is excluded, the PBSA needs gap in 2025 amounts to 12,952 beds, growing to 26,556 beds by 2041 across the commutable HEPs from Wandsworth. The pipeline is excluded because the analysis is used to assess the suitability of the PBSA developments in the pipeline against the identified needs gap for the borough. The needs gap applies to boroughs that are within commutable distance from these HEPs and does not indicate the scale of expected provision in Wandsworth. This assessment shall be provided in the following sections of this review.

## 8. PBSA pipeline in Wandsworth

There are currently two PBSA developments approved and at pre-tender stage, which are expected to boost student bedspaces by 1,196.

### **Nine Elms – Watkin Jones<sup>18</sup>: 762**

The proposed redevelopment of the Bookers Wholesale and BMW garage sites on Battersea Park Road and Sleaford Street aims to transform the area into a vibrant mixed-use development featuring three buildings ranging from 12 to 22 storeys. Currently at the planning stage, the scheme includes 762 student beds and 55 affordable homes, with a prime location near Battersea Power Station. The development proposal was approved in appeal.

### **Armoury Way – Downing Students<sup>19</sup>: 434**

The development at 2 Armoury Way aims to transform a 5,739 sqm brownfield site into a vibrant student living space, featuring two 10-storey towers with capacity for up to 434 students. As part of the agreement, 35% of the accommodation will be offered at affordable rates, and 51% of the rooms will be allocated to a university under a Nomination Agreement. Located within the “Gasholder Site, Armoury Way” area, the project aligns with Wandsworth’s recently adopted Local Plan (2022), which identifies the site as ideal for mixed-use redevelopment.

Realising both of these developments would increase current PBSA provision in Wandsworth from 3,849 to 5,045, a 31% increase on current provision.

---

<sup>18</sup> PBSA News (2025). [Watkin Jones brings Nine Elms PBSA to market](#) (scheme details, 762 beds and 55 affordable homes)

<sup>19</sup> Downing (2024). [Downing submits planning for London’s Armoury Way PBSA](#)

## 9. Estimating future PBSA need in Wandsworth

London is a complex and dynamic metropolitan city with good public transportation making it easy for the population to move between boroughs and access different services and amenities. This makes it challenging to estimate the quantum of PBSA that any single borough should provide in order to meet the identified needs gap. Consequently, this report uses two methodologies to estimate the potential allocation from commutable HEPs: PBSA per Capita of Borough Population and PBSA per Capita of Commutable Student Population.

Both methodologies establish a target quantum of PBSA for each borough based on the selected demand metric and distribute the identified needs gap proportionally according to each borough's shortfall. The approach to needs gap allocation balances deliverability and steady expansion of supply across all underprovided boroughs with growth of PBSA in those with the largest structural deficits. This approach supports sustained increases in overall provision while allowing longer-term spatial rebalancing of the PBSA provision for the target HEPs. The purpose is not to require all boroughs to meet their full target within the plan period, as this could result in over-provision because some boroughs already exceed their target. Instead, the approach seeks to move each borough closer to its demand-derived target in a proportional manner, without exceeding overall market demand.

The sum of PBSA allocations may exceed the total identified needs gap due to the rounding up to whole bedspaces. Rounding ensures that allocations do not include fractions of beds and that the full needs gap is addressed. This approach prioritises avoiding under-supply, accepting a small potential over-supply as a practical and conservative measure.

### 9.1. PBSA per Capita of Borough Population

This methodology looks at the total PBSA needed to serve the FTS population of the commutable HEPs from Wandsworth as a proportion of the total population of the boroughs (GLA, 2023)<sup>20</sup> that could service the HEPs and calculates the PBSA allocations per capita. It then seeks to distribute the PBSA Need Gap evenly across the commutable boroughs which have not already met or exceed their Target PBSA/Capita target.

To calculate the Target PBSA, this methodology takes the Total Current PBSA and the Needs Gap to provide the Total Target PBSA for the HEPs. Following from that, the total population of the target boroughs is divided by the Total Target PBSA to provide a target PBSA/Capita value, as shown in Table 8.

---

<sup>20</sup> Greater London Authority (GLA) (2023). [GLA Population Projections: Custom Age Tables dataset](#)

Table 8 PBSA/Capita Calculations

Year	2025	2041
a. Current PBSA	73,965	73,965
b. Needs Gap	12,466	26,070
c. Target PBSA (a + b)	85,831	99,435
d. Total Population	6,543,200	7,360,700
<b>e. Target PBSA/Capita (c/d)</b>	<b>0.0131</b>	<b>0.0135</b>

Applying the Target PBSA/Capita value to the population of each borough provides a Target PBSA value and, from this, a shortfall can be calculated. In turn, this can be used to calculate the Shortfall % - the relative scale of the shortfall as a percent of overall shortfall across the boroughs. This provides a weighted value to determine the quantum of allocation from the needs gap (Needs Gap Allocation). Thus, a borough with a larger shortfall will be allocated a proportionally larger allocation of the needs gap compared to a borough with a smaller shortfall, though both will be allocated some of the total needs gap.

Table 9 PBSA/Capita additional PBSA allocation 2025

Borough	Population Size	Current PBSA	Current PBSA/Capita	Target PBSA	Shortfall	Shortfall %	Needs Gap Allocation
Barking and Dagenham	234,300	-	-	3,074	3,074	10.94%	1,365
Barnet	422,900	759	0.0018	5,548	4,789	17.05%	2,126
Brent	358,200	7,682	0.0214	4,699			-
Camden	264,300	5,817	0.0220	3,467			-
City of London	8,700	4,828	0.5549	115			-
Croydon	421,100	817	0.0019	5,524	4,707	16.76%	2,089
Ealing	397,000	4,376	0.0110	5,208	832	2.96%	370
Greenwich	312,000	4,513	0.0145	4,093			-
Hackney	298,500	2,899	0.0097	3,916	1,017	3.62%	452
Hammersmith and Fulham	215,200	1,968	0.0091	2,823	855	3.04%	380
Haringey	297,400	2,271	0.0076	3,902	1,631	5.81%	724
Islington	248,400	1,719	0.0069	3,259	1,540	5.48%	684
Kensington and Chelsea	164,700	2,925	0.0178	2,161			-
Kingston upon Thames	190,300	3,828	0.0201	2,497			-
Lambeth	346,400	4,480	0.0129	4,544	64	0.23%	29
Merton	222,700	829	0.0037	2,922	2,093	7.45%	929
Newham	387,200	5,710	0.0147	5,080			-
Richmond upon Thames	209,600	623	0.0030	2,750	2,127	7.57%	944
Southwark	343,400	5,958	0.0174	4,505			-
Sutton	219,300	-	-	2,877	2,877	10.24%	1,277
Tower Hamlets	353,900	5,615	0.0159	4,643			-
Wandsworth	357,200	3,849	0.0108	4,686	837	2.98%	372
Westminster	270,500	1,899	0.0070	3,549	1,650	5.87%	733
<b>Total</b>	<b>6,543,200</b>	<b>73,365</b>	<b>0.0112</b>	<b>85,842</b>	<b>28,093</b>	<b>100%</b>	<b>12,474</b>

Table 9 shows the Needs Gap Allocation for 2025. Wandsworth has a Current PBSA/Capita value of 0.0108 which is slightly below the 2025 Target PBSA/Capita value of 0.0131. The 2025 Target PBSA/Capita value provides a figure of 4,686 Target PBSA beds. Deducting the Current PBSA of 3,849 from the Target PBSA figure provides a shortfall of 837 beds which represents 2.98% of the total shortfall of 28,093. As a result, 2.98% of the Total Needs Gap is allocated to Wandsworth:  $2.98\% \times 12,466 = 372$  Needs Gap Allocation.

Next, the methodology compares the Needs Gap Allocation to Wandsworth's PBSA pipeline of 1,196. This shows the current pipeline PBSA exceeds the Needs Gap Allocation and would provide a **surplus of 824** PBSA bedspaces.

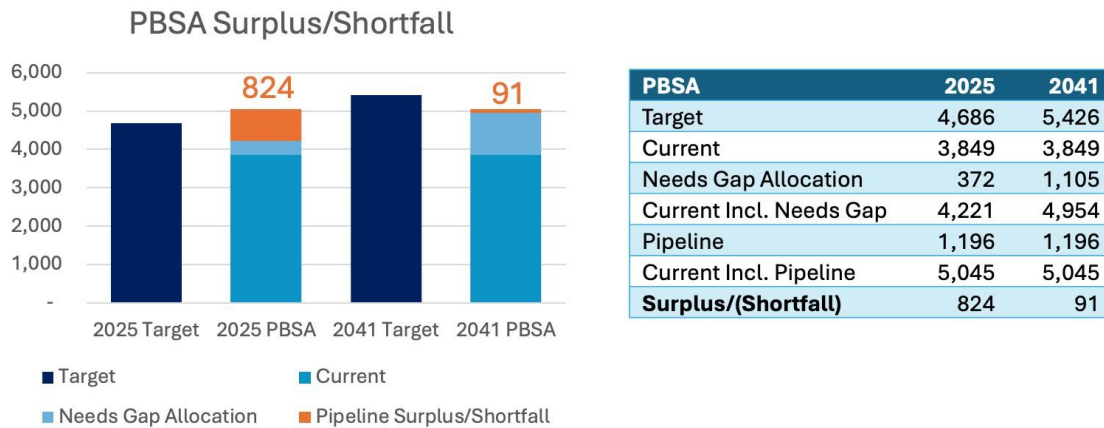
Looking ahead to 2041, the Target PBSA/Capita increases to 0.0135, raising Wandsworth's target PBSA to 5,426. This indicates a shortfall of 1,577 bedspaces, equivalent to 4.24% of the total shortfall. This shortfall provides a **Needs Gap Allocation of 1,105**. Comparing this Needs Gap Allocation to the current pipeline, this figure is also below the current pipeline value of 1,196 beds. If these PBSA developments are going to be built out, the borough would still have a **surplus of 91** PBSA bedspaces. See Table 10 for the figures.

*Table 10 PBSA/Capital additional PBSA allocation 2041*

Borough	Population Size	Current PBSA	Current PBSA/Capita	Target PBSA	Shortfall	Shortfall %	Needs Gap Allocation
Barking and Dagenham	316,600	-	-	4,277	4,277	11.49%	2,996
Barnet	466,500	759	0.0016	6,302	5,543	14.89%	3,883
Brent	400,100	7,682	0.0192	5,405			-
Camden	285,300	5,817	0.0204	3,855			-
City of London	10,500	4,828	0.4598	142			-
Croydon	463,000	817	0.0018	6,255	5,438	14.61%	3,810
Ealing	421,800	4,376	0.0104	5,699	1,323	3.55%	927
Greenwich	374,300	4,513	0.0121	5,057	544	1.46%	382
Hackney	324,800	2,899	0.0089	4,388	1,489	4.00%	1,043
Hammersmith and Fulham	268,400	1,968	0.0073	3,626	1,658	4.45%	1,162
Haringey	320,900	2,271	0.0071	4,336	2,065	5.55%	1,447
Islington	269,000	1,719	0.0064	3,634	1,915	5.15%	1,342
Kensington and Chelsea	177,100	2,925	0.0165	2,393			-
Kingston upon Thames	214,300	3,828	0.0179	2,895			-
Lambeth	376,300	4,480	0.0119	5,084	604	1.62%	424
Merton	245,700	829	0.0034	3,320	2,491	6.69%	1,745
Newham	473,600	5,710	0.0121	6,398	688	1.85%	482
Richmond upon Thames	225,300	623	0.0028	3,044	2,421	6.50%	1,696
Southwark	400,800	5,958	0.0149	5,415			-
Sutton	239,100	-	-	3,230	3,230	8.68%	2,263
Tower Hamlets	400,400	5,615	0.0140	5,409			-
Wandsworth	401,600	3,849	0.0096	5,426	1,577	4.24%	1,105
Westminster	285,300	1,899	0.0067	3,855	1,956	5.26%	1,371
<b>Total</b>	<b>7,360,700</b>	<b>73,365</b>	<b>0.0100</b>	<b>99,445</b>	<b>37,219</b>	<b>100%</b>	<b>26,078</b>

In summary, in 2025 the delivery of the current PBSA pipeline of 1,196 bedspaces would exceed the Target PBSA for that year by 824 bedspaces, creating a surplus and potential short-term oversupply. By 2041, the total provision would remain below the borough's absolute PBSA per capita target, however, the pipeline would exceed the recommended Needs Gap Allocation by 91 bedspaces. While this presents a risk of modest over-provision relative to the allocated Needs Gap, the difference is marginal and within the tolerance of the modelling assumptions.

Figure 4 Additional PBSA/Capita 2025 vs 2041



## 9.2. PBSA per Weighted Commutable Student Population

This second methodology takes the same approach as above but instead of the population of the borough it uses the commutable FTS population of the target HEPs to assess the appropriate PBSA Needs Gap Allocation. See Commutable Student Populations in Section 3 for more information.

To calculate the Target PBSA, this methodology sums the Total Current PBSA and the Needs Gap to provide the Total Target PBSA for the HEPs. Then the Commutable FTS population of the target HEPs is divided by the Total Target PBSA to provide a Target PBSA/FTS value, as shown in the Table 11 below:

Table 11 PBSA/Commutable FTS Calculations

Year	2025	2041
a. Current PBSA	73,965	73,965
b. Needs Gap	12,466	26,070
c. Target PBSA (a + b)	85,831	99,435
d. Total Commutable FTS	3,527,378	4,557,652
<b>e. Target PBSA/FTS (c/d)</b>	<b>0.0243</b>	<b>0.0218</b>

As before, multiplying the Target PBSA/FTS value with the Commutable FTS figure for each borough provides a Target PBSA value and from this, a shortfall can be calculated. In turn, this can be used to calculate the Shortfall %. This provides a weighted value to determine the quantum of allocation from the needs gap (Needs Gap Allocation).

Table 12 PBSA/Commutable FTS Needs Gap Allocation 2025

Borough	Commutable FTS	Current PBSA	Current PBSA/FTS	Target PBSA	Shortfall	Shortfall %	Needs Gap Allocation
Barking and Dagenham	144,080	-	-	3,506	3,506	13.01%	1,623
Barnet	64,675	759	0.0117	1,574	815	3.02%	377
Brent	165,472	7,682	0.0464	4,026	-	0.00%	-
Camden	168,816	5,817	0.0345	4,108	-	0.00%	-
City of London	168,816	4,828	0.0286	4,108	-	0.00%	-
Croydon	196,828	817	0.0042	4,789	3,972	14.74%	1,839
Ealing	165,472	4,376	0.0264	4,026	-	0.00%	-
Greenwich	165,472	4,513	0.0273	4,026	-	0.00%	-
Hackney	165,472	2,899	0.0175	4,026	1,127	4.18%	522
Hammersmith and Fulham	176,800	1,968	0.0111	4,302	2,334	8.66%	1,080
Haringey	132,703	2,271	0.0171	3,229	958	3.56%	444
Islington	168,816	1,719	0.0102	4,108	2,389	8.87%	1,106
Kensington and Chelsea	176,800	2,925	0.0165	4,302	1,377	5.11%	638
Kingston upon Thames	61,339	3,828	0.0624	1,493	-	0.00%	-
Lambeth	180,144	4,480	0.0249	4,383	-	0.00%	-
Merton	147,424	829	0.0056	3,587	2,758	10.24%	1,277
Newham	165,472	5,710	0.0345	4,026	-	0.00%	-
Richmond upon Thames	193,484	623	0.0032	4,708	4,085	15.16%	1,891
Southwark	168,816	5,958	0.0353	4,108	-	0.00%	-
Sutton	11,377	-	-	277	277	1.03%	129
Tower Hamlets	165,472	5,615	0.0339	4,026	-	0.00%	-
Wandsworth	196,828	3,849	0.0196	4,789	940	3.49%	436
Westminster	176,800	1,899	0.0107	4,302	2,403	8.92%	1,112
<b>Total</b>	<b>3,527,378</b>	<b>73,365</b>	<b>0.4817</b>	<b>85,831</b>	<b>26,942</b>	<b>100%</b>	<b>12,474</b>

Table 12 shows the Needs Gap Allocation for 2025. Wandsworth has a Current PBSA/Capita value of 0.0196, slightly below the target value of 0.0243. This provides a target PBSA of 4,789 and, deducting the Current PBSA of 3,849, shows a shortfall of 940 which represents 3.49% of the total shortfall of 26,942. As a result, 3.49% of the Total Needs Gap is allocated to Wandsworth:  $3.49\% \times 12,466 = 436$  **Needs Gap Allocation**.

Next the methodology compares the Needs Gap Allocation to Wandsworth's PBSA pipeline of 1,196. This shows that the current pipeline of PBSA exceeds the Needs Gap Allocation and would provide a **surplus of 760** PBSA bedspaces.

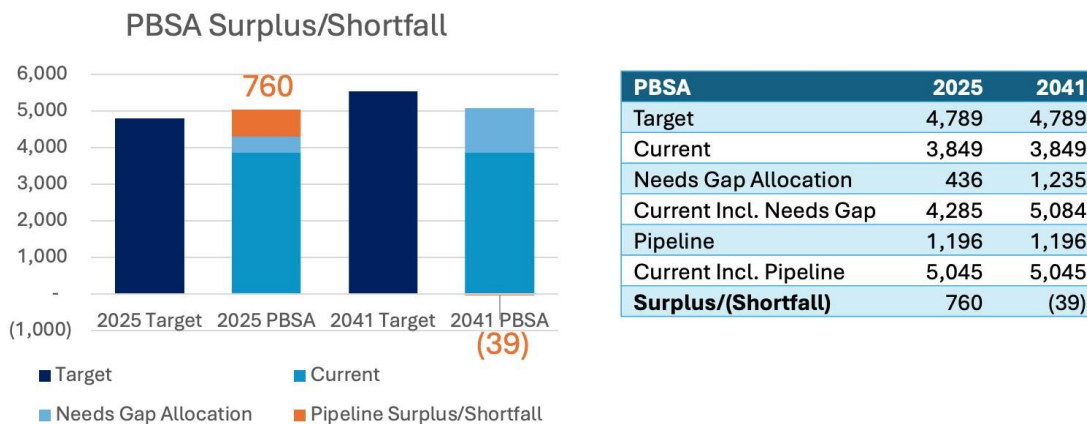
Looking ahead to 2041, the PBSA/Capita target decreases to 0.0218. However, this still represents an increase, raising Wandsworth's target PBSA to 5,426 due to growth in the FTS population. As a result, this shows a shortfall of 1,681 or 4.74% of Total Shortfall. This gives a **Needs Gap Allocation of 1,235**. This is slightly above the current pipeline value of 1,196. If these PBSA developments were to be built out, the borough would have a final minor **shortfall of 39** PBSA bedspaces in 2041.

Table 13 PBSA/FTS Needs Gap Allocation 2041

Borough	Commutable FTS	Current PBSA	Current PBSA/FTS	Target PBSA	Shortfall	Shortfall %	Needs Gap Allocation
Barking and Dagenham	186,109	-	-	4,060	4,060	11.44%	2,982
Barnet	83,712	759	0.0091	1,826	1,067	3.01%	784
Brent	214,388	7,682	0.0358	4,677	-	0.00%	-
Camden	218,526	5,817	0.0266	4,768	-	0.00%	-
City of London	218,526	4,828	0.0221	4,768	-	0.00%	-
Croydon	253,471	817	0.0032	5,530	4,713	13.28%	3,462
Ealing	214,388	4,376	0.0204	4,677	301	0.85%	222
Greenwich	214,388	4,513	0.0211	4,677	164	0.46%	121
Hackney	214,388	2,899	0.0135	4,677	1,778	5.01%	1,306
Hammersmith and Fulham	228,487	1,968	0.0086	4,985	3,017	8.50%	2,216
Haringey	171,989	2,271	0.0132	3,752	1,481	4.17%	1,088
Islington	218,526	1,719	0.0079	4,768	3,049	8.59%	2,239
Kensington and Chelsea	228,487	2,925	0.0128	4,985	2,060	5.80%	1,513
Kingston upon Thames	76,682	3,828	0.0499	1,673	-	0.00%	-
Lambeth	232,625	4,480	0.0193	5,075	595	1.68%	438
Merton	190,247	829	0.0044	4,151	3,322	9.36%	2,440
Newham	214,388	5,710	0.0266	4,677	-	0.00%	-
Richmond upon Thames	249,333	623	0.0025	5,440	4,817	13.57%	3,538
Southwark	218,526	5,958	0.0273	4,768	-	0.00%	-
Sutton	14,120	-	-	308	308	0.87%	227
Tower Hamlets	214,388	5,615	0.0262	4,677	-	0.00%	-
Wandsworth	253,471	3,849	0.0152	5,530	1,681	4.74%	1,235
Westminster	228,487	1,899	0.0083	4,985	3,086	8.69%	2,267
<b>Total</b>	<b>4,557,652</b>	<b>73,365</b>	<b>0.3739</b>	<b>99,435</b>	<b>35,500</b>	<b>100%</b>	<b>26,078</b>

In summary, in 2025 the delivery of the current PBSA pipeline of 1,196 bedspaces would exceed the Target PBSA for that year by 760 bedspaces, creating a surplus and potential short-term oversupply. By 2041, total provision would remain below the borough’s absolute PBSA per FTS target and the pipeline would fall short of the recommended Needs Gap Allocation by 39 bedspaces. While this presents a risk of modest under-provision relative to the allocated Needs Gap, the difference is marginal and within the tolerance of the modelling assumptions.

Figure 5 Additional PBSA/FTS 2025 vs 2041



## 10. Limitations and Assumptions

While every reasonable effort has been made to ensure the accuracy and relevance of this report, London's scale and complexity inevitably require certain assumptions and introduce limitations. The following points outline the key parameters that have shaped the analysis.

### 10.1. Key Assumptions

The study assumes that borough and student population growth rates remain steady throughout the analysis period, and that no new major infrastructure projects are introduced which might significantly alter demographic patterns. Due to the lack of a defined PBSA target in the London SHMA (2017), this report adopts a benchmark provision rate of 24% of students in PBSA. Additionally, a desirable "living at home" rate is estimated at 30%, and it is assumed that the entirety of the PBSA Needs Gap can be met through PBSA development.

### 10.2. Data and Methodological Limitations

This analysis applies a closed-system, constrained spatial allocation methodology. Surplus or deficit in one borough directly affects allocations elsewhere. By operating within a fixed total demand, the approach maintains internal consistency, avoids double-counting, and provides a transparent, rules-based mechanism for spatial redistribution. It also reflects realistic cross-boundary student mobility and enables comparative assessment of borough-level shortfalls within a single coherent framework.

This closed market methodology therefore does not account for demand outside the defined study area, avoiding infinite expansion of the geographical scope. Needs Gap Allocation is calculated at the borough level and does not capture operational impacts at the individual PBSA asset level. Similarly, the zero-sum allocation approach does not reflect real-world phasing, delivery timing, or provider strategy. While cross-boundary student flows are acknowledged, these are assumed to balance in both directions and are not explicitly modelled.

The sources are primarily based on publicly available data and insights from research associates Student Crowd and Student Source. Data on the affordability and accessibility of PBSA is inconsistently reported, preventing analysis of these segments. Borough population projections are drawn from GLA datasets, while student numbers are sourced from HESA.

Many PBSA developments serve multiple institutions or are not directly linked to a specific Higher Education Provider (HEP); in such cases, allocations have been made to the nearest HEP. This introduces a margin of error in borough-level allocations which cannot be reasonably quantified. Additionally, due to the interconnected nature of London's PBSA market, demand from HEPs or supply from boroughs not included in this analysis may influence the need in areas outside

Wandsworth. Therefore, this analysis should not be used to assess PBSA requirements in any borough other than Wandsworth.

The current methodology does not account for potential over-supply associated with some HEPs that may result from the delivery of pipeline PBSA developments. This is particularly relevant in boroughs that may already be nearing or exceeding their target provision. Moreover, this study does not assess land availability or suitability for PBSA development, nor does it identify specific timelines for when new beds should be delivered. It also excludes two PBSA schemes for which bed numbers could not be verified: Chapter Kings Cross (Islington) and GoBritanya Ealing Residence (Ealing).

This analysis does not consider physical capacity constraints at specific sites, planning or regulatory restrictions, or the practical feasibility of delivering PBSA schemes of the recommended size. These factors could affect the pace and scale of provision in practice and should be reviewed alongside the Needs Gap Allocation.

### 10.3. Policy

The PBSA market is influenced by a range of local, London-wide, and national policy decisions, including planning regulations, housing delivery targets, affordable housing requirements, and student housing strategies. Changes in these policies, or the interpretation and implementation by individual boroughs, could materially affect both the supply and demand for PBSA. This analysis does not account for future policy changes and cannot anticipate how such changes would impact the distribution or quantum of PBSA across boroughs. Consequently, while the Needs Gap Allocation and associated findings provide a snapshot based on current policy settings and planning frameworks, they may over or understate future provision if policy interventions accelerate, restrict, or otherwise alter PBSA development.

# 11. Conclusions

## 11.1. Summary of Findings

Across both the Population-based and Weighted Full-Time Student (FTS) methodologies, Wandsworth's current PBSA development pipeline of 1,196 bedspaces is broadly sufficient to meet the borough's proportionate contribution to student accommodation provision through to 2041. In the short term, delivery of the pipeline would exceed the borough's estimated requirement in 2025 by 824 bedspaces under the Population-based approach and by 760 bedspaces under the Weighted FTS approach. This suggests the potential for a temporary surplus if schemes were delivered immediately and if all boroughs simultaneously met their allocated Needs Gap.

Within the wider London context, the modelling continues to demonstrate a structural shortfall in PBSA provision across the capital. The wider commutable study area shows an estimated accommodation deficit of 12,952 bedspaces in 2025, increasing to 26,556 bedspaces by 2041 if no additional development occurs. These projections assume that current accommodation patterns remain broadly stable, with approximately 30% of students living at home, 24% accommodated in PBSA and 46% living in HMOs.

However, recent changes to UK student visa policy, including restrictions on dependants for postgraduate students, introduce some uncertainty around long-term demand projections. These policy changes may reduce international student numbers at certain Higher Education Providers and therefore influence the overall scale and composition of student accommodation demand over time.

Looking to 2041, the modelling indicates that overall PBSA provision in Wandsworth would remain close to the borough's proportionate requirement under both methodologies. Under the Population-based approach, the pipeline would exceed the recommended Needs Gap allocation by 91 bedspaces, bringing provision close to the projected long-term requirement. Under the Weighted FTS approach, the pipeline would fall marginally short of the recommended allocation by 39 bedspaces, indicating a modest level of under-provision relative to that methodology.

Taken together, the findings indicate that Wandsworth is broadly aligned with its proportional role within the wider London student housing market. While the borough may experience a short-term surplus relative to the modelled 2025 requirement, the existing pipeline largely addresses the longer-term needs identified through both allocation methodologies.

Given the inherent uncertainty surrounding student population growth, development viability, planning policy and market conditions, the scale and timing of PBSA delivery should continue to be monitored over time. The conclusions of this assessment should therefore be considered

alongside the methodological limitations identified within this report, including the closed-system allocation framework and reliance on current behavioural housing assumptions.

## 11.2. Recommendations

### **Strategic Coordination**

Given London's complex and interconnected higher education market, cross-borough commuting patterns mean that student housing demand operates across administrative boundaries. Wandsworth should therefore continue to work collaboratively with neighbouring boroughs and relevant strategic bodies to ensure that PBSA provision is distributed appropriately across the wider London higher education market.

### **Management of Short-Term Delivery**

In the short term, delivery of the current PBSA pipeline of 1,196 bedspaces may result in temporary oversupply relative to the modelled 2025 requirements. Under the Population-based methodology this would represent a surplus of 824 bedspaces, while under the Weighted FTS methodology the surplus would be approximately 760 bedspaces.

To mitigate potential operational risks associated with short-term oversupply, the timing and phasing of PBSA development should be carefully monitored. Phased delivery may help ensure that new supply aligns with actual demand growth while maintaining stable occupancy levels within existing schemes.

### **Monitoring of Long-Term Demand**

While the current pipeline broadly addresses the borough's estimated requirement under both methodologies, continued monitoring of student population trends will be important. This is particularly relevant given evolving government policies affecting international student recruitment, which may influence future demand for student accommodation.

Regular updates to student population projections and PBSA supply data should therefore be undertaken to ensure that future planning decisions remain aligned with emerging evidence.

### **Pipeline and Development Viability**

The overall quantum of PBSA currently proposed within Wandsworth appears broadly appropriate based on the modelling undertaken in this report. However, the development pipeline should continue to be actively monitored.

If any consented schemes do not proceed, the unrealised bedspaces may need to be replaced through future PBSA development in order to maintain the borough's proportional contribution to the wider London accommodation market. Conversely, delivery materially in excess of the

modelled requirement should be carefully assessed to ensure that it does not undermine the long-term operational sustainability of existing schemes.

Consideration should therefore be given to viable scheme sizes, occupancy thresholds required for financial sustainability, and prevailing market conditions when assessing future proposals.

### **Ongoing Evidence Review**

The modelling presented in this report assumes continuation of current behavioural housing patterns, including approximately 30% of students living at home, 24% accommodated in PBSA and 46% living in HMOs. Any significant changes in these proportions could materially affect the identified needs gap.

It is therefore recommended that the PBSA needs assessment be periodically reviewed, ideally on an annual or biennial basis, to reflect changes in student population trends, higher education strategies, tenure patterns and market conditions.

Regular review will help ensure that PBSA provision in Wandsworth remains responsive to long-term demand while supporting operational viability and alignment with planning policy objectives.

## Appendix A: Glossary

**Affordable PBSA** – Student housing offered at rent levels not exceeding 55% of the maximum London maintenance loan, as required by The London Plan (2021).

**Beds per Capita (Beds/Capita)** – A metric showing the number of PBSA bedspaces relative to either the borough population or commutable student population, used to assess provision levels.

**Commutable Full-Time Student Enrolments (Commutable FTS)** – The number of full-time equivalent students able to commute within 45 minutes to Higher Education Providers (HEPs), used to estimate local demand for PBSA.

**Duty to Cooperate** – A statutory requirement for local planning authorities to work collaboratively with neighbouring councils and strategic bodies to address cross-boundary planning issues, including student housing.

**Fast Track Route (FTR)** – A streamlined planning approval process established under The London Plan (2021) to expedite housing developments that meet specific affordable housing criteria.

**Full-Time Student Enrolments (FTS)** – The total number of individual students officially registered in full-time higher education courses at a given institution, in a specific academic year.

**Greater London Authority (GLA)** – The regional authority for London, responsible for The London Plan (2021) and strategic planning across the city, including housing and education policy.

**Higher Education Provider (HEP)** – An institution delivering university-level education, including universities and specialised colleges.

**Higher Education Statistics Agency (HESA)** – The UK's official source of data on higher education, used to project student population growth and inform PBSA needs assessments.

**House in Multiple Occupation (HMO)** – A property rented by at least three unrelated tenants who share facilities; a common form of student housing that competes with PBSA.

**The London Plan (2021)** – The statutory strategic spatial development framework for Greater London, prepared by the Mayor, which sets citywide planning policies including those for PBSA (e.g., Policy H15).

**Local Plan Policy LP28 (LP28)** – Wandsworth's planning policy setting out criteria for assessing PBSA developments, including location, affordability, and management requirements.

**National Planning Policy Framework (NPPF)** – The central UK government policy document on land use planning, guiding local plan development and housing delivery, including for student accommodation.

**Open Government Licence (OGL)** – A licence that permits the free use and reuse of public sector information, provided attribution is given to the data source.

**Opinion Research Services (ORS)** – A research consultancy that produces housing needs assessments, such as the Wandsworth HNA (2024) used in this study.

**Purpose-Built Student Accommodation (PBSA)** – Residential accommodation designed specifically for students, either privately developed or managed by HEPS, typically offering en-suite or shared facilities.

**Planning Practice Guidance (PPG)** – National guidance accompanying an NPPF, offering detailed direction to local planning authorities on addressing specific housing needs, including student housing.

**Strategic Housing Market Assessment (SHMA)** – A technical study used to determine the housing needs across a region, including quantified targets for PBSA in London.

**Viability Tested Route (VTR)** – A planning process applied to developments that do not meet the required threshold for affordable housing and must provide viability evidence, as per The London Plan (2021) Policy H5.

## Appendix B: Student Population Growth

To project FTS populations in the future this report uses HESA (2025) data from 2017 to 2024, then uses a 3 year average to project estimated growth through to 2041. Table 14 shows international student population estimates, as provided by target HEPs where available, or the next best source identified.

*Table 14 Estimates of International Student Populations*

University	Approx % Intl.	Source URL
University of Roehampton	17 %	<a href="https://www.thecompleteuniversityguide.co.uk/universities/university-of-roehampton">https://www.thecompleteuniversityguide.co.uk/universities/university-of-roehampton</a>
University College London (UCL)	53 %	<a href="https://www.ucl.ac.uk/about/facts-and-figures/ucl-student-statistics">https://www.ucl.ac.uk/about/facts-and-figures/ucl-student-statistics</a>
King's College London	38 %	<a href="https://www.kcl.ac.uk/aboutking/s/orgstructure/ps/studentrecords/statistics.aspx">https://www.kcl.ac.uk/aboutking/s/orgstructure/ps/studentrecords/statistics.aspx</a>
University of the Arts London (UAL)	48 %	<a href="https://www.arts.ac.uk/study-at-ual/international/your-country">https://www.arts.ac.uk/study-at-ual/international/your-country</a>
Imperial College London	61 %	<a href="https://www.imperial.ac.uk/about/introducing-imperial/facts-and-figures/student-numbers/figures/student-numbers/">https://www.imperial.ac.uk/about/introducing-imperial/facts-and-figures/student-numbers/figures/student-numbers/</a>
University of Westminster	27 %	<a href="https://www.westminster.ac.uk/about-us/facts-and-figures/student-statistics">https://www.westminster.ac.uk/about-us/facts-and-figures/student-statistics</a>
Kingston University London	20 %	<a href="https://www.kingston.ac.uk/aboutkingstonuniversity/facts-and-figures/figures/">https://www.kingston.ac.uk/aboutkingstonuniversity/facts-and-figures/figures/</a>
London School of Economics (LSE)	70 %	<a href="https://info.lse.ac.uk/staff/divisions/Planning-Division/Statistics/Student-statistics">https://info.lse.ac.uk/staff/divisions/Planning-Division/Statistics/Student-statistics</a>
London South Bank University (LSBU)	15 %	<a href="https://www.lsbu.ac.uk/about-us/facts-and-figures">https://www.lsbu.ac.uk/about-us/facts-and-figures</a>
St George's, University of London	11 %	<a href="https://www.sgul.ac.uk/about/our-institution/facts-and-figures">https://www.sgul.ac.uk/about/our-institution/facts-and-figures</a>

The international student percentages were applied to the total FTS populations for 2017-2024. Then an average growth rate was calculated from the final three years (2022-2024) of actual data for the domestic and international data sets. The FTS populations were then extrapolated out to 2041 using this single rate, 1.21% for domestic and 2.08% for international. Then the data was recombined to give total FTS populations. This results in an average year on year growth rate for the total FTS population 2025-2041 of 1.59%. See Table 15, Table 16 and Table 17 for more information.

Table 15 Total FTS Populations

Year	University of Roehampton	University College London	King's College London	University of the Arts London	Imperial College London	University of Westminster	Kingston University	London School of Economics	London Southbank University	St George's University of London	Total	Growth Rate
2017	9,630	30,655	24,095	17,340	16,350	15,115	16,395	10,730	10,515	3,000	153,825	0.00%
2018	11,050	32,710	25,570	18,190	16,925	14,720	14,980	11,185	9,920	3,220	158,470	3.02%
2019	11,365	33,890	26,635	18,395	17,485	14,920	14,380	11,455	10,040	3,365	161,930	2.18%
2020	11,105	34,945	27,640	19,355	18,030	15,750	15,780	11,665	10,815	3,355	168,440	4.02%
2021	11,255	39,615	31,570	20,475	19,695	17,080	16,345	12,940	12,560	3,520	185,055	9.86%
2022	11,165	39,940	34,040	21,840	20,015	17,760	17,750	12,495	12,830	3,480	191,315	3.38%
2023	11,630	46,305	33,510	23,020	20,840	17,925	16,560	12,870	11,935	3,300	197,895	3.44%
2024	11,175	45,310	32,265	22,175	21,025	18,340	16,455	12,500	11,225	3,300	193,770	-2.08%
<b>2025-2041 Projections</b>												
2025	11,328	46,069	32,763	22,537	21,392	18,606	16,684	12,728	11,377	3,344	196,828	1.58%
2026	11,483	46,841	33,270	22,905	21,766	18,877	16,916	12,961	11,531	3,389	199,939	1.58%
2027	11,641	47,627	33,785	23,280	22,146	19,152	17,152	13,198	11,687	3,434	203,102	1.58%
2028	11,801	48,427	34,309	23,662	22,534	19,431	17,391	13,440	11,846	3,480	206,321	1.58%
2029	11,963	49,242	34,841	24,050	22,929	19,714	17,634	13,686	12,007	3,527	209,593	1.59%
2030	12,127	50,071	35,382	24,445	23,331	20,002	17,880	13,937	12,169	3,574	212,918	1.59%
2031	12,294	50,914	35,932	24,847	23,740	20,294	18,130	14,192	12,334	3,622	216,299	1.59%
2032	12,463	51,773	36,492	25,256	24,158	20,590	18,384	14,453	12,501	3,670	219,740	1.59%
2033	12,634	52,647	37,061	25,672	24,583	20,891	18,641	14,719	12,671	3,719	223,238	1.59%
2034	12,808	53,537	37,639	26,096	25,015	21,197	18,903	14,989	12,844	3,769	226,797	1.59%
2035	12,985	54,443	38,227	26,526	25,456	21,508	19,169	15,265	13,019	3,820	230,418	1.60%
2036	13,164	55,366	38,825	26,964	25,905	21,824	19,438	15,547	13,197	3,871	234,101	1.60%
2037	13,346	56,305	39,433	27,410	26,363	22,144	19,711	15,833	13,376	3,923	237,844	1.60%
2038	13,530	57,261	40,051	27,864	26,829	22,470	19,988	16,125	13,558	3,975	241,651	1.60%
2039	13,717	58,234	40,680	28,326	27,303	22,801	20,270	16,422	13,743	4,029	245,525	1.60%
2040	13,906	59,224	41,319	28,796	27,787	23,137	20,556	16,725	13,930	4,083	249,463	1.60%
2041	14,099	60,233	41,969	29,274	28,279	23,479	20,846	17,034	14,120	4,138	253,471	1.61%

Table 16 Domestic FTS Populations

Year	University of Roehampton	University College London	King's College London	University of the Arts London	Imperial College London	University of Westminster	Kingston University	London School of Economics	London Southbank University	St George's University of London	Total	Growth Rate
2017	7,992	14,407	14,938	9,016	6,376	11,033	13,116	3,219	8,937	2,670	93,721	0.00%
2018	9,171	15,373	15,853	9,458	6,600	10,745	11,984	3,355	8,432	2,865	95,854	2.28%
2019	9,432	15,928	16,513	9,565	6,819	10,891	11,504	3,436	8,534	2,994	97,635	1.86%
2020	9,217	16,424	17,136	10,064	7,031	11,497	12,624	3,499	9,192	2,985	101,689	4.15%
2021	9,341	18,619	19,573	10,647	7,681	12,468	13,076	3,882	10,676	3,132	111,116	9.27%
2022	9,266	18,771	21,104	11,356	7,805	12,964	14,200	3,748	10,905	3,097	115,238	3.71%
2023	9,652	21,763	20,776	11,970	8,127	13,085	13,248	3,861	10,144	2,937	117,586	2.04%
2024	9,275	21,295	20,004	11,531	8,199	13,388	13,164	3,750	9,541	2,937	115,108	-2.11%
<b>2025-2041 Projections</b>												
2025	9,388	21,554	20,247	11,671	8,299	13,551	13,324	3,796	9,657	2,973	116,485	1.21%
2026	9,502	21,816	20,493	11,813	8,400	13,716	13,486	3,843	9,775	3,010	117,880	1.21%
2027	9,618	22,081	20,742	11,957	8,502	13,883	13,650	3,890	9,894	3,047	119,291	1.21%
2028	9,735	22,349	20,994	12,103	8,606	14,052	13,816	3,938	10,015	3,084	120,720	1.21%
2029	9,854	22,621	21,249	12,250	8,711	14,223	13,984	3,986	10,137	3,122	122,166	1.21%
2030	9,974	22,896	21,507	12,399	8,817	14,396	14,154	4,035	10,260	3,160	123,628	1.21%
2031	10,096	23,174	21,768	12,550	8,924	14,571	14,326	4,084	10,385	3,199	125,108	1.21%
2032	10,219	23,456	22,033	12,703	9,033	14,748	14,500	4,134	10,511	3,238	126,607	1.21%
2033	10,343	23,741	22,301	12,858	9,143	14,927	14,676	4,185	10,639	3,278	128,124	1.21%
2034	10,469	24,030	22,572	13,015	9,254	15,109	14,855	4,236	10,769	3,318	129,661	1.21%
2035	10,597	24,322	22,846	13,173	9,367	15,293	15,036	4,288	10,900	3,359	131,216	1.21%
2036	10,726	24,618	23,124	13,333	9,481	15,479	15,219	4,341	11,033	3,400	132,790	1.21%
2037	10,857	24,917	23,405	13,495	9,597	15,667	15,404	4,394	11,167	3,442	134,382	1.21%
2038	10,989	25,220	23,689	13,659	9,714	15,858	15,591	4,448	11,303	3,484	135,993	1.21%
2039	11,123	25,526	23,977	13,825	9,832	16,051	15,781	4,502	11,441	3,527	137,624	1.21%
2040	11,258	25,836	24,268	13,993	9,952	16,246	15,973	4,557	11,580	3,570	139,273	1.21%
2041	11,395	26,150	24,563	14,163	10,073	16,444	16,167	4,613	11,721	3,614	140,944	1.21%

Table 17 International FTS Populations

Year	University of Roehampton	University College London	King's College London	University of the Arts London	Imperial College London	University of Westminster	Kingston University	London School of Economics	London Southbank University	St George's University of London	Total	Growth Rate
2017	1,638	16,248	9,157	8,324	9,974	4,082	3,279	7,511	1,578	330	62,121	0.00%
2018	1,879	17,337	9,717	8,732	10,325	3,975	2,996	7,830	1,488	355	64,634	4.05%
2019	1,933	17,962	10,122	8,830	10,666	4,029	2,876	8,019	1,506	371	66,314	2.60%
2020	1,888	18,521	10,504	9,291	10,999	4,253	3,156	8,166	1,623	370	68,771	3.71%
2021	1,914	20,996	11,997	9,828	12,014	4,612	3,269	9,058	1,884	388	75,960	10.45%
2022	1,899	21,169	12,936	10,484	12,210	4,796	3,550	8,747	1,925	383	78,099	2.82%
2023	1,978	24,542	12,734	11,050	12,713	4,840	3,312	9,009	1,791	363	82,332	5.42%
2024	1,900	24,015	12,261	10,644	12,826	4,952	3,291	8,750	1,684	363	80,686	-2.00%
<b>2025-2041 Projections</b>												
2025	1,940	24,515	12,516	10,866	13,093	5,055	3,360	8,932	1,720	371	82,368	2.08%
2026	1,981	25,025	12,777	11,092	13,366	5,161	3,430	9,118	1,756	379	84,085	2.08%
2027	2,023	25,546	13,043	11,323	13,644	5,269	3,502	9,308	1,793	387	85,838	2.08%
2028	2,066	26,078	13,315	11,559	13,928	5,379	3,575	9,502	1,831	396	87,629	2.08%
2029	2,109	26,621	13,592	11,800	14,218	5,491	3,650	9,700	1,870	405	89,456	2.08%
2030	2,153	27,175	13,875	12,046	14,514	5,606	3,726	9,902	1,909	414	91,320	2.08%
2031	2,198	27,740	14,164	12,297	14,816	5,723	3,804	10,108	1,949	423	93,222	2.08%
2032	2,244	28,317	14,459	12,553	15,125	5,842	3,884	10,319	1,990	432	95,165	2.08%
2033	2,291	28,906	14,760	12,814	15,440	5,964	3,965	10,534	2,032	441	97,147	2.08%
2034	2,339	29,507	15,067	13,081	15,761	6,088	4,048	10,753	2,075	451	99,170	2.08%
2035	2,388	30,121	15,381	13,353	16,089	6,215	4,133	10,977	2,119	461	101,237	2.08%
2036	2,438	30,748	15,701	13,631	16,424	6,345	4,219	11,206	2,164	471	103,347	2.08%
2037	2,489	31,388	16,028	13,915	16,766	6,477	4,307	11,439	2,209	481	105,499	2.08%
2038	2,541	32,041	16,362	14,205	17,115	6,612	4,397	11,677	2,255	491	107,696	2.08%
2039	2,594	32,708	16,703	14,501	17,471	6,750	4,489	11,920	2,302	502	109,940	2.08%
2040	2,648	33,388	17,051	14,803	17,835	6,891	4,583	12,168	2,350	513	112,230	2.08%
2041	2,704	34,083	17,406	15,111	18,206	7,035	4,679	12,421	2,399	524	114,568	2.08%

## Appendix C: Higher Education Identification

The following analysis assesses the Higher Education Providers (HEPs) that could be serviced by PBSA located in Wandsworth based on commute time and cost.

The Higher Education Funding Council for England (HEFCE), London Student Housing Review (Greater London Authority) and National Union of Students (NUS) all advise an acceptable commute time of up to 45 minutes for students, although none provide a methodology. This analysis used Google Maps with a starting point of Wandsworth Town Station (SW18 4TF) and commuting to the main campus location, arriving by 8:30 am and departing after 05:30 pm and took the maximum of the minimum travel time from the morning and evening commute. Using Google Maps instead of train and bus schedules provides an estimate of total commute time, including any distances walked, and simplifies commute times for multiple modes of transport, providing a more accurate, real-world, estimate of commute times. A summary of commute times can be found in Table 18. All times are approximate and can vary based on factors such as traffic conditions.

While not specified in any Government or Local Authority guidance, according to common student budgeting resources<sup>21</sup> students should spend approximately 10-15% of their budget on Transportation. If a student has no additional income and is only receiving their maintenance loan their income will be approximately £1,000.00 per month. Thus, assuming the minimum rate of 10%, their transportation should cost no more than 10% of £1,000.00 which is £100.00 per month, maximum. Taking an average of 30 days per month, a daily maximum cost to commute would be £100.00/30 which comes to £3.33 per day. Assuming a student needs to have a part time job to study in London, or has another source of additional income of at least £500.00 extra per month the daily commuter cost increases to £5.00 per day, using the same methodology as above. A student Oyster card is capped at £5.25 so this should be acceptable for the majority of students in London, therefore specific commute costs have not been calculated for the identified HEP

---

<sup>21</sup> WalletHub. [Budgeting blog](#); Ramsey Solutions. [Budgeting percentages](#); Investopedia. [Budgeting calculator](#)

Table 18 FTS commute times from boroughs

Borough	Postcode & Station Used	University of Roehampton	King's College London	London School of Economics	Imperial College London	University of Westminster	University of the Arts London	London South Bank University	St George's, University of London	University College London (UCL)	Kingston University
Barking and Dagenham	IG11 7BS (Barking Station)	74	34	40	49	40	38	38	62	35	72
Barnet	EN5 4DZ (Barnet Station)	85	51	49	60	43	46	51	81	40	100
Brent	NW10 7NJ (Willesden Junction)	51	38	42	33	26	34	39	53	24	57
Camden	NW1 2DA (Euston Square Station)	52	25	24	31	13	22	31	44	1	52
City of London	EC2R 8DN (Bank Station)	46	11	14	27	12	10	12	33	18	46
Croydon	CR0 1NX (East Croydon Station)	45	36	41	36	33	41	36	45	39	45
Ealing	W5 5DB (Ealing Broadway Station)	53	41	36	34	23	34	41	60	30	70
Greenwich	SE10 9LS (Greenwich Station)	67	29	35	45	40	34	27	51	31	63
Hackney	E8 1HE (Hackney Central Station)	65	43	41	45	25	36	38	61	25	71
Hammersmith and Fulham	W6 7AL (Hammersmith Station)	34	26	33	19	30	30	39	48	23	61
Haringey	N8 8AA (Tumpike Lane Station)	78	39	35	46	34	32	47	67	32	76
Islington	N1 8AA (Angel Station)	70	28	26	40	24	23	22	43	18	68
Kensington and Chelsea	SW7 2AZ (South Kensington Station)	39	15	21	1	18	19	28	48	23	52
Kingston upon Thames	KT1 1EE (Kingston Station)	39	50	52	51	43	55	45	44	47	10
Lambeth	SW9 8BB (Brixton Station)	42	25	33	28	19	29	25	31	22	47
Merton	SM4 5QX (Morden Station)	49	38	43	48	36	41	31	17	36	48
Newham	E15 1BB (Stratford Station)	63	28	25	41	23	21	27	48	24	59
Richmond upon Thames	TW9 1DN (Richmond Station)	25	39	41	32	41	45	38	51	38	36
Southwark	SE1 8AA (London Bridge Station)	51	20	26	32	21	22	13	37	24	49
Sutton	SM1 1AA (Sutton Station)	59	50	56	51	47	57	41	47	51	53
Tower Hamlets	E1 6AN (Whitechapel Station)	57	14	20	30	20	24	26	50	16	72
Wandsworth	SW18 1AD (Wandsworth Town Station)	18	35	37	40	28	40	33	31	32	37
Westminster	W1H 7AF (Paddington Station)	44	25	24	17	12	21	27	48	10	60

## Appendix D: PBSA Pipeline

The following PBSA development pipeline have been identified in the boroughs which are commutable within 45 minutes of the identified HEPs.

*Table 19 PBSA Pipeline for Commutable Boroughs*

HEP	Project Name/ Borough Location	Postcode	Ownership	Nearest HEP	Status	Bed Capacity Change	Expected Completion	Notes	Source URL
King's College London	Champion Hill Residence	SE5 8AF	Southwark	King's College London	Submitted	TBD	TBD	Residence has been empty since 2020 due to fire safety concerns; refurbishment plans are underway.	<a href="https://pbsanews.co.uk/2025/03/03/arlington-advisorsappointed-to-refurbchampion-hill-pbsa/">https://pbsanews.co.uk/2025/03/03/arlington-advisorsappointed-to-refurbchampion-hill-pbsa/</a>
London School of Economics	Bankside House Redevelopment	SE1 9JU	Southwark	LSE partnership Bouygues UK/Equitix	Submitted	2,000	2030	Redevelopment aims to significantly increase student accommodation; planning application submission expected in 2025.	<a href="https://info.lse.ac.uk/staff/divisions/estates-division/lseestate/developmentprojects/Bankside-HouseRedevelopment">https://info.lse.ac.uk/staff/divisions/estates-division/lseestate/developmentprojects/Bankside-HouseRedevelopment</a>
Kingston University	Kingston Bridge House	KT1 1QT	Kingston upon Thames	Westcombe Group	Under consultation	(180)	TBD	Former student accommodation to be converted into residential flats; potential inclusion of boutique hotel under revised plans.	<a href="https://www.westcombehomes.com/developments/development/kingston-bridgehouse/">https://www.westcombehomes.com/developments/development/kingston-bridgehouse/</a>
University College London (UCL)	Billingsgate Market PBSA	EC3R 6DP	City of London	Urbanest	In construction	1,672	2026	Development includes student beds and 80 residential apartments; amenities feature gym, yoga studio, cinema, study spaces, and games rooms.	<a href="https://pbsanews.co.uk/2023/09/01/urbanest-startsconstruction-at-london-pbsascheme/">https://pbsanews.co.uk/2023/09/01/urbanest-startsconstruction-at-london-pbsascheme/</a>
University of Westminster	29 Marylebone Road Development	NW1 5LS	Camden	University of Westminster	Approved	TBD	TBD	Refurbishment and extension to develop the UK's most inclusive centre for employability and enterprise; may have implications for student facilities.	<a href="https://www.westminster.ac.uk/news/westminsterbreaks-ground-at-29marylebone-road-toconstruct-uks-mostinclusive-centreforemployability-and-enterprise">https://www.westminster.ac.uk/news/westminsterbreaks-ground-at-29marylebone-road-toconstruct-uks-mostinclusive-centreforemployability-and-enterprise</a>

HEP	Project Name/ Location	Postcode	Borough	Ownership	Nearest HEP	Status	Bed Capacity	Expected Completion	Notes	Source URL
University of Greenwich	AVF Developments PBSA Scheme	SE10 0RJ	Greenwich	AVF Developments		Approved	190	TBD	New purpose-built student accommodation scheme approved in Greenwich.	<a href="https://pbsanews.co.uk/2025/02/27/avf-developmentssecures-planning-forgreenwich-pbsa/">https://pbsanews.co.uk/2025/02/27/avf-developmentssecures-planning-forgreenwich-pbsa/</a>
London Metropolitan University	Estates Strategy (2022–2031)	Not Available	Not Available	London Metropolitan University		Planning stage	TBD	TBD	Strategy includes considerations for developing own student housing on campus over the strategy's duration.	<a href="https://www.londonmet.ac.uk/media/london-metropolitanuniversity/london-metdocuments/professionalservicedepartments/marketingadmissions-and-ukrecruitment/brand-andweb/Estates-strategy-2022-2031.pdf">https://www.londonmet.ac.uk/media/london-metropolitanuniversity/london-metdocuments/professionalservicedepartments/marketingadmissions-and-ukrecruitment/brand-andweb/Estates-strategy-2022-2031.pdf</a>
Private Sector	123 Kentish Town Road	NW1 8PB	Camden	Regal London	University College London	Planning Approved	250	2026	Proposal for a 250bed PBSA development with ground-floor retail space.	<a href="#">Regal London</a>
Private Sector	Former Islington Hospital Site	N7 9QH	Islington	Not specified	London Metropolitan University	Planning Submitted	242	2027	Mixed-use development including 242 student accommodation units.	<a href="#">Constructing London</a>
Private Sector	58 Uxbridge Road (Exchange Plaza)	W5 2ST	Ealing	ASE II Ealing Ltd	University of West London	Planning Approved	500	2026	20-storey development comprising over 500 student flats and office space.	<a href="#">Ealing Today</a>
Private Sector	67 Commercial Road	E1 1AN	Tower Hamlets	Not specified	Queen Mary University of London	Planning Submitted	350	2027	Proposed 15-storey building comprising 350 student accommodation units.	<a href="#">Tower Hamlets Planning Portal</a>
Private Sector	89 Wembley Park Drive	HA9 8HF	Brent	Greystar	Middlesex University London	Under Construction	770	2025	Construction of a 770bed PBSA facility under the Canvas brand.	<a href="#">Greystar Newsroom</a>

HEP	Project Name/ Location	Postcode	Borough	Ownership	Nearest HEP	Status	Bed Capacity Change	Expected Completion	Notes	Source URL
Private Sector	Wood Green PBSA, Haringey	N22 6UJ	Haringey	Fusion Group	University College London (UCL)	Approved	636	TBD	Mixed-use development including student accommodation and social housing; amenities feature coworking spaces, private study areas, library, recording studio, fitness areas, yoga and sauna rooms.	<a href="http://fusion-group.co.uk">fusion-group.co.uk</a>
Private Sector	Southwark Station Development	SE1 8TX	Southwark	Places for London & Helical	King's College London	Approved	429	TBD	Development above Southwark Tube station; includes retail and community spaces, aiming for high sustainability standards.	<a href="http://fpl.gov.uk">fpl.gov.uk</a>
Private Sector	Park Royal Development, West London	NW10 6LH	Brent	Maccreanor Lavington	University of Westminster	Approved	888	TBD	PBSA-led mixed-use development with workspace and affordable housing; includes green spaces and public realm improvements.	<a href="http://maccreanorlavington.com">maccreanorlavington.com</a>
Private Sector	Brent Cross Town PBSA	NW4 3NN	Barnet	Fusion Group	University of the Arts London	Approved	650	TBD	Part of a mixed-use development in Brent Cross Town; amenities include study areas, gaming zone, health kitchen, yoga studio, and relaxation pods.	<a href="http://fusion-group.co.uk">fusion-group.co.uk</a>
Private Sector	Wembley Park PBSA	HA9 0AF	Brent	Greystar	University of Westminster	In construction	770	Sep-25	Development near Wembley Park tube station; amenities include lounges, gym, screen room, games room, private dining, communal study areas, cycle storage, and external gardens.	<a href="http://sturents.com">sturents.com</a>

HEP Expected	Project Name/ Notes Location Completion	Postcode	Borough	Ownership	Nearest HEP	Status	Bed Capacity	Change	Source URL	
Private Sector	Stratford PBSA, East London	E15 1BX	Newham	Curlew Capital	Queen Mary University of London	Approved	282	2023/2024 Academic Year	Development on Stratford High Street; includes community space for local charities and start-ups; aims for BREEAM 'Outstanding' rating.	<a href="https://creherald.com">creherald.com</a>
Private Sector	Woolwich PBSA	SE18 6LA	Greenwich	QIP & Hurlington Capital	University of Greenwich	Approved	298	2026/2027 Academic Year	Development in the Royal Arsenal regeneration area; well-connected by public transport.	<a href="https://europe-re.com">europe-re.com</a>
Private Sector	Crutched Friars, City of London	EC3N 2AE	City of London	Dominus Group	London School of Economics	Approved	769	TBD	Mixed-use scheme near Fenchurch Street; part of Dominus Group's expansion in student accommodation development.	<a href="https://www.built-environment-networking.com/news/dominus-planning-pbsa/?utm_source=chatgpt.com">https://www.built-environment-networking.com/news/dominus-planning-pbsa/?utm_source=chatgpt.com</a>
Private Sector	Devonshire Place, Southwark	SE1 0LZ	Southwark	Regal London	London South Bank University	Approved	941	TBD	Mixed-use development on Old Kent Road; includes affordable housing and community amenities.	<a href="https://bdcmagazine.com">bdcmagazine.com</a>
Private Sector	Wembley Greenway, Brent	HA9 0TG	Brent	Regal London	Kingston University	Approved	998	TBD	Development near High Road, Wembley; includes accessible rooms and community spaces.	<a href="https://regal.co.uk">regal.co.uk</a>
Private Sector	Armoury Way	SW18 1SH	Wandsworth	Downing Students	University of Roehampton	Pre Tender	434	TBD	The plans include transforming a 5,739 sqm brownfield site at 2 Armoury Way into a vibrant student living space, comprising two 10-storey towers with the capacity to house up to 434 students.	<a href="https://downing.com/article/london-student-development">https://downing.com/article/london-student-development</a> <a href="https://downing.com/article/london-student-development-plans/plans/#:~:text=Downing%20has%20submitted%20plans%20for,house%20up%20to%20434%20students">https://downing.com/article/london-student-development-plans/plans/#:~:text=Downing%20has%20submitted%20plans%20for,house%20up%20to%20434%20students</a>

HEP	Project Name/ Location	Postcode	Borough	Ownership	Nearest HEP	Status	Bed Capacity Change	Expected Completion	Notes	Source URL
Private Sector	Nine Elms	SW8 5AL	Wandsworth	Fresh Student TBC	University of the Arts London	Pre Tender	762	TBD	The development is set to offer 762 student beds and is conveniently located near the Battersea Power Station. In addition to the student accommodation, the scheme will also provide 55 affordable homes.	<a href="https://pbsanews.co.uk/2025/03/04/watkin-jones-brings-nine-elms-pbsa-to-market/">https://pbsanews.co.uk/2025/03/04/watkin-jones-brings-nine-elms-pbsa-to-market/</a> <a href="https://pbsanews.co.uk/2025/03/04/watkin-jones-brings-nine-elms-pbsa-to-market/nine-elms-pbsa-to-market/">https://pbsanews.co.uk/2025/03/04/watkin-jones-brings-nine-elms-pbsa-to-market/nine-elms-pbsa-to-market/</a>
Private Sector	Kennington Lane Development	SE11 5RD	Lambeth	International Students House (ISH)	London South Bank University	In construction	185	2026	The proposal is for a nine-storey building with 185 student rooms. Construction work has now started on site.	<a href="https://ishkenningtonlane.org.uk/introducing-ish/">https://ishkenningtonlane.org.uk/introducing-ish/</a>
Arcadia University	Thoresby House	N1 7TQ	Hackney	Arcadia University	City, University of London	Approved	140	TBD	Erection of a new 12 storey building to provide 3,297sqm of student accommodation (Sui Generis), with 140 student bed spaces.	<a href="https://www.cma-planning.co.uk/projects/566">https://www.cma-planning.co.uk/projects/566</a> <a href="https://www.cma-planning.co.uk/projects/566-thoresby-house">https://www.cma-planning.co.uk/projects/566-thoresby-house</a> <a href="https://www.cma-planning.co.uk/projects/566-thoresby-house/thoresby-house">thoresby-house</a>