

[REDACTED]

From: Matt Eyre [REDACTED]
Sent: 03 July 2026 17:49
To: Local Plan
Cc: [REDACTED]
Subject: Newham Local Plan Main Modifications Representations - Impact Partnership Joint Venture (previously IQL Office LP)
Attachments: Stratford Cross - Response_form_Main_Mods - 03.06.26.pdf; Stratford Cross Main Modifications Representations - 03.07.26.pdf

Dear Madam/Sir,

Please find the representations to the Newham Local Plan Main Modifications consultation on behalf of Impact Partnership Joint Venture (previously IQL Office LP).

The form and representations are attached to this email.

Please can you confirm receipt via return email.

Kind Regards,

Matt

Matt Eyre
Associate
[REDACTED]

Quod
21 Soho Square
London, W1D 3QP
quod.com



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Response Form for Consultation of Proposed Main Modifications to the Newham Local Plan 2026 – 2042

	Local Plan Consultation of Proposed Main Modifications to the Newham Local Plan 2026 – 2042 Response Form	Ref: (For official use only)
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Name of the Local Plan to which this representation relates:

Newham Draft Submission
Local Plan

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Response Form

This form has two parts –

Part A – Personal Details: need only be completed once.

Part B – Your representation(s). Please fill in a separate sheet for each representation you wish to make.

Part A

Anonymous responses cannot be accepted. Representations will be published with your name, but personal contact details will be kept confidential.

Personal Details*

Agent's Details (if applicable)

**If an agent is appointed, please complete only the Title, Name and Organisation (if applicable) boxes below but complete the full contact details of the agent.*

Title		Mr
Name		Matthew Eyre
Job Title (where relevant)		
Organisation (where relevant)		Quod on behalf of Impact Partnership Joint Venture (previously IQL Office LP)
Address Line 1		21 Soho Square
Line 2		
Line 3		
Line 4		London
Post Code		W1D 3QP
Telephone Number		
E-mail Address (where relevant)		

Representor type (Please tick as appropriate)

Works in Newham
Statutory Consultee
Resident
Elected official
Developer

Community Group Representative
Business owner
Other (please specify)

☐	
☐	
☐	
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☐	
☐	

Part B – Please use a separate sheet for each representation

Name or Organisation:

Quod on behalf of Impact Partnership Joint Venture (previously IQL Office LP)

What chapter is your response referring to?

Please tick as appropriate

Vision and Objectives		Building a Fairer Newham	
Design		High Streets	
Social Infrastructure		Inclusive Economy	
Homes	☒	Green and Water Spaces	
Climate Emergency		Transport	
Waste and Utilities			

Neighbourhoods - N1 North Woolwich		Neighbourhoods - N2 Royal Victoria	
Neighbourhoods - N3 Royal Albert North		Neighbourhoods - N4 Canning Town	
Neighbourhoods - N5 Custom House		Neighbourhoods - N6 Manor Road	
Neighbourhoods - N7 Three Mills		Neighbourhoods - N8 Stratford and Maryland	
Neighbourhoods - N9 West Ham		Neighbourhoods - N10 Plaistow	
Neighbourhoods - N11 Beckton		Neighbourhoods - N12 East Ham South	
Neighbourhoods - N13 East Ham		Neighbourhoods - N14 Green Street	
Neighbourhoods - N15 Forest Gate		Neighbourhoods - N16 Manor Park and Little Ilford	
Neighbourhoods - N17 Gallions Reach			
Other (please specify)			

What is the Main Modification or map change reference(s) you are commenting on?

You can find the modification reference in the main modifications table. We acknowledge an issue may relate to more than one Main Modification, in which case please reference all relevant modification references.

MM57 and MM58 in relation to Policy H8, which are unsound on the basis they are not positively prepared, not justified based on evidence or consistent with strategic policies.

Response

Please focus your comments only on the Proposed Modifications and please provide:

- The Main Modification or Policies Map change reference(s) you are commenting on
- Whether you consider the modification legally compliant and/or sound
- If unsound, which test(s) of soundness it fails and the change you seek
- Any evidence supporting your view
- Any alternative wording you wish to propose

This consultation should not be used to:

- Repeat comments previously made at Regulation 18 or 19 stages
- Comment on parts of the Plan that are not subject to a Proposed Modification

Please see enclosed representations.

(Continue on a separate sheet /expand box if necessary)

Do you wish to be notified about future Examination stages:

Yes ☒ No ☐

Please return to London Borough of Newham by 5pm 7th July 2026



Impact Partnership Joint Venture
(previously IQL Office LP)

LBN Main Modifications Representations

July 2026
Q250985

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1 Introduction

- 1.1 These representations are prepared by Quod on behalf of Impact Partnership Joint Venture (previously IQL Office LP) (“IP JV”), who are the main landowner of the Stratford Cross commercial and residential quarter in Stratford Metropolitan Centre, and relates to Draft Policy H8: Purpose-Built Student Accommodation (“PBSA”).
- 1.2 IP JV is the main landowner at Stratford Cross – a major residential and commercial quarter within the Stratford Metropolitan Centre, with a PTAL of 6b (the highest level) and within London Borough of Newham’s (LBN) Draft Local Plan Allocation N8.SA5 Stratford Town Centre West.
- 1.3 In reviewing consultation responses, we urge the Inspector to take these representations into account to ensure the policy is sound, implementable, positively prepared and supports meeting the demonstrable student need in the area and much needed housing delivery.
- 1.4 These representations on the Main Modifications (“MMs”) reiterate our previous concerns with the additional restrictions on PBSA development in the Stratford and Maryland Neighbourhood (“SM Neighbourhood”) in Draft Policy H8 Part 1 and wider implementation and viability considerations in Part 4. These representations are structured to address these issues, as follows:
 - **Section 2** – Explains why there is insufficient evidence to support the need for additional restrictions for the SM Neighbourhood in Part 1. Even if it progresses through to adopted policy, applying it too rigidly could hinder, not progress housing delivery. That cannot be left to officer discretion and should be clear in the policy itself.
 - **Section 3** – Explains why the Implementation Table overconcentration monitoring methodology spatial criteria is too inflexible to respond to site considerations and any other benefits of proposals;
 - **Section 4** – Summarises the inconsistency of the Nominations Agreements (NA) requirements with the London Plan 2021 and associated impacts to wider housing delivery from; and
 - **Section 5** – Sets out clear recommendations to make Draft Policy H8 positively prepared, sound with the London Plan 2021, proportionate and effective.
- 1.5 These considerations are explained in the following sections with supporting monitoring details from planning application included in **Appendix 1**, with relevant extracts of the Draft Policy H8 in **Appendix 2** and proposed draft wording in **Appendix 3**.

2 Insufficient Evidence to Support Draft Policy H8 Part 1

- 2.1 IP JV welcomes the changes to the methodology for monitoring overconcentration of PBSA within neighbourhoods in the Implementation Table, which have improved since the Regulation 22 version. In particular, the criteria whereby PBSA would be considered overconcentrated where it comprises more than 25 per cent of net residential approvals and completions over the plan period. Whilst this is an improvement from the Regulation 22 methodology, as we have set out in our previous representations this does not reflect the mix and balance of the existing community which comprises mostly general needs housing and no overconcentration of students as a proportion of the SM Neighbourhood.
- 2.2 Notwithstanding, there is no evidence provided by LBN using this methodology to justify that there is an existing or anticipated overconcentration of PBSA in the SM Neighbourhood. Accordingly, there is no evidence to justify why Part 1 of Policy H8 should apply to the SM Neighbourhood, particularly where there has been significant and continued growth in Higher Education Institutions (“HEIs”).
- 2.3 Appendix 1 provides a list of the latest available planning permissions and applications showing the PBSA and housing delivery in the SM Neighbourhood during the plan period from 2023. Using this information, Table 2-1 below demonstrates that PBSA currently only accounts for 20.5% of completions, planning consents and applications in the SM Neighbourhood, which is clearly below the 25% threshold proposed for overconcentration.

Table 2-1: Housing delivery ratio in the SM Neighbourhood during the plan period

Housing Type	Units Constructed, Consented and Submitted (PBSA Housing Equivalent at (2.4:1 Ratio applied as per MMs)	%
All Housing (C3 Use)	12,343	79.5%
PBSA	3,183	20.5%
Total	15,526	100%

- 2.4 No evidence has been shared by LBN using the latest methodology in the MMs to demonstrate there is overconcentration in the SM Neighbourhood and therefore, no justification for the additional restrictions in Part 1 of Draft Policy H8. Consequently, Part 1 is not justified and should be removed, and the SM Neighbourhood should be subject to the same overconcentration monitoring criteria as all other neighbourhoods.
- 2.5 Without this change, additional restrictions for PBSA would remain for the SM Neighbourhood even if the overconcentration threshold of PBSA providing 25% of all housing delivery is not met at any point over the plan period. This would disproportionately place additional

restrictions on the SM Neighbourhood over all others in the borough, without evidence or flexibility to respond to on-going monitoring.

Summary

- 2.6 In our previous representations and throughout the hearing process, we have repeatedly sought robust evidence to support the assumption that there is an overconcentration of PBSA in the SM Neighbourhood. All methodologies proposed have solely focussed on the proportion of delivery within the plan period but have never taken into account the existing balance of housing in the SM Neighbourhood, which is mostly taken by general needs housing.
- 2.7 Whilst the latest overconcentration monitoring methodology is more proportionate, we still have concerns it is not monitoring the mix and balance of the community but the short-term housing delivery.
- 2.8 However, there is a fundamental concern that there is no evidence at all provided that demonstrates that there is an overconcentration of PBSA in the SM Neighbourhood using any proposed methodology and as such, added restrictions are applied to the area based on assumptions not supported by evidence. These restrictions are applied throughout the plan period, without any consideration to any monitoring of delivery and community mix, unlike all other neighbourhoods.
- 2.9 Consequently, the policy is not positively prepared and places unnecessary additional restrictions on PBSA in the SM Neighbourhood that are not supported by evidence but is also too rigid to be able to respond to changes in the PBSA and general needs housing delivery in the SM Neighbourhood.

3 Implementation Criteria Scope and inflexibility

- 3.1 The boroughwide monitoring criteria for overconcentration in the 'ALL' section of the Implementation Table sets out two criteria. The first relating to the proportion of PBSA in overall housing delivery and the second relates to proximity to other PBSA schemes.
- 3.2 The proposed wording of this proximity criterion restricts new PBSA proposals where they would lead to over 800 PBSA beds within 300m of the proposal site.
- 3.3 Our concern is that this mechanistic approach does not reflect the different characters, designations, density of the town centre and spatial growth strategy across the borough, as well as the demonstrable student need in the area. Furthermore, the inflexibility of the wording will not allow for proposals to be determined fairly on their own merits, for instance where they are part of a mixed-use development providing other significant benefits, such as housing, including affordable housing. As part of mixed use schemes, PBSA can help enable the delivery of conventional housing whilst also freeing up existing family housing stock otherwise used as houses in multiple occupation by students.

Policy Context

- 3.4 The SM Neighbourhood is located within the designated Stratford Metropolitan Centre ("SMC") (with a strategic policy direction for this to grow into an International Centre) and the Olympic Legacy Opportunity Area ("OA") in the London Plan (2021), where significant regeneration is expected to deliver 39,000 homes. The Draft LBN Local Plan designates the SM Neighbourhood within a 'Transform Area', with Draft Policy BFN1 directing significant levels of growth to the SM Neighbourhood, with all development expected to make best use of land and optimise sites.
- 3.5 London Plan Policy H15 and associated Purpose-Built Student Accommodation London Plan Guidance (the "LPG") further directs PBSA to Inner City OAs, Metropolitan and Major Centres and highly accessible areas and as part of mixed-use regeneration schemes.
- 3.6 Therefore, the spatial policies in the London Plan and Draft LBN Local Plan direct growth, high-density development and PBSA to the SM Neighbourhood and by this nature will result in high-density PBSA schemes in closer proximity. Added to this, there are several HEI campuses located in the SMC driving the need for student accommodation easily accessible to these campuses. This is in contrast to other parts of the borough, which have lower accessibility, lower density and other restrictions, such as heritage or open space restrictions.
- 3.7 As a result, the spatial criteria is not flexible enough to reflect the differing characteristics of neighbourhoods and is in conflict with the wider strategic policies. If implemented, the effect will be to make new PBSA all but impossible in the area of the borough where development is focussed, sites are more appropriate for PBSA and where there is greatest demand and need for PBSA, resulting in pressure on the local private rental market.

Student Need

- 3.8 IP JV commissioned Knight Frank to undertake a PBSA Demand and Market Assessment in advance of a planning application later this year, with the draft included as **Appendix 4**. This

identified that due to the rapid growth in student numbers associated with the new and expanded university campuses, there are almost 30,000 full-time students (not at home) living in LBN with a bed ratio of 6.7 in LBN (second highest in London).

- 3.9 This is very concentrated in and around the SMC where for instance within 1.25km/0.75 mile radius of Stratford Cross there are c.7,750 full-time students. Further HEI expansion is planned in the area at Arden University, University College London and the opening of University of Hull in July 2026 resulting in a predicted 19,000 students studying in the immediate area by 2030. The growth in this area is illustrated in Figure 3-1 below taken from the Knight Frank report.

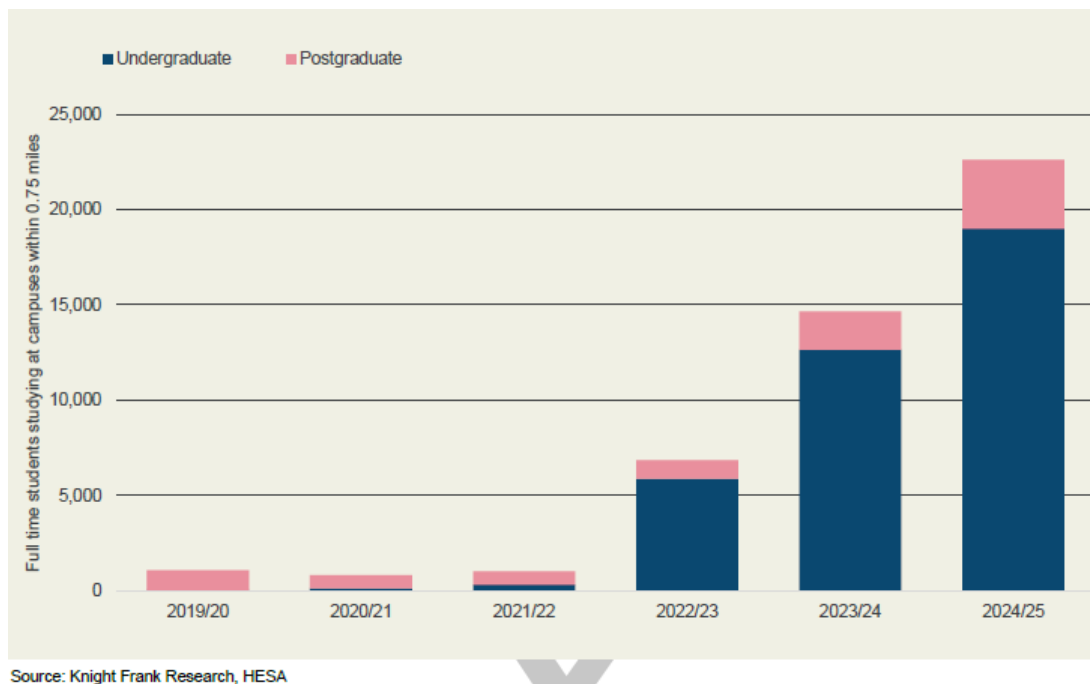


Figure 3-1: Growth of Full time students studying within 0.75 miles of Stratford Cross

- 3.10 The available data demonstrates that there is a rapidly growing need for PBSA in the SM Neighbourhood, close to campuses and in SMC where land take can be reduced through higher density development.
- 3.11 Another result of the high-density nature of the area is that HEI's are located in close proximity to each other in and around the Stratford Metropolitan Centre. Meaning that in many instances even where PBSA proposals would meet the Draft Policy H8 part 1. a) and 2. a) requirements to be proposed adjacent to a campus, defined as within 300m, they would exceed the 800 beds within 300m threshold. As such, the proposed policy framework is so restrictive that PBSA in the area will be undeliverable for either private developers or HEI's and demonstrably not positively prepared.
- 3.12 These disproportional restrictions on PBSA being provided around Stratford means it is likely that students will continue to place more unwanted pressure on the local private rented market and family housing, particularly with the significant forecast growth projections.

Summary

- 3.13 The monitoring criteria unreasonably restricts proposals for PBSA in the SM Neighbourhood, which is where the spatial policies in the London Plan and Draft LBN Local Plan direct significant development and PBSA. This is also an area with multiple HEI campuses leading to high student demand for accommodation, with a 6.7 student to bed ratio in LBN as a whole and a far higher demand near the university campuses focussed in Stratford. This will be exacerbated by the growth in student numbers planned by existing and new HEI's in the SM Neighbourhood.
- 3.14 Furthermore, applying such a mechanistic approach to locations for PBSA will not allow for the specific merits of the proposals to be considered, such as supporting the viability of delivering affordable housing in mixed-use schemes.

4 Increased Nominations Agreements Requirements

- 4.1 Part 4 of Draft Policy H8 sets out the different requirements for NA's with HEI depending on the concentration of PBSA in the neighbourhood.
- 4.2 The requirement for NA's to be secured with one or more HEI for a majority of bedrooms is set out by London Plan Policy H15 and supporting text 4.15.3 and sets the strategic policy for PBSA across London. Supporting text 4.15.3 explains that NA's are not required to be linked to HEI's in the relevant borough where the development is proposed.
- 4.3 Consequently, the draft Policy H8 Part 4 wording is unsound with the London Plan. Firstly, by applying increased requirements for all bedrooms to be secured through a NA in overconcentrated areas in criterion b. and secondly by requiring these to be spatially linked to the adjacent HEI in criterion c.
- 4.4 It is also important to understand the reluctance of many HEI's to enter into future NA's due to the implications of carrying such a large balance-sheet liability in what is a challenging macro-economic environment, exacerbated by head-winds specific to the HEI sector. HEI's are cautious because the need to respond to fluctuations in demand for accommodation and therefore, while a quantum of beds secured by NA is attractive to secure a number of beds, overcommitting will expose them to greater commercial risk. However, providing more flexibility in the PBSA market will allow for HEI's to take up available space in response to student growth and supports a wider PBSA offer in the SM Neighbourhood to meet the substantial forecast student growth in the area. This means it will be important for policy to support flexibility for the forecast HEI growth.
- 4.5 Where NA are secured, they need to be offered at a significant discount to market value in order to help secure their agreement. The LPG acknowledges this in paragraph 3.1.5, where it considers that HEI's might be reluctant to agree NA's because of the potential commercial liabilities involved.
- 4.6 Consequently, the greater the number of beds under a NA increases the amount of discount and worsens the viability of the PBSA, which in a mixed-use development will impact the ability to provide general housing, including much needed affordable housing. This will have wider impacts on delivery in the borough and particularly on town centre brownfield sites, like Stratford Cross where viability is already challenged.

Summary

- 4.7 As currently worded, Draft Policy H8 Part 4 is unsound with the strategic PBSA policies in the London Plan by setting criteria requiring all bedrooms to be secured through a NA and requiring these to be spatially linked to a HEI.
- 4.8 This position misunderstands the important role of PBSA in supporting the wider delivery of general housing and the impact NA's have on viability, particularly in the current environment where the viability of high-density housing schemes is challenging and means little housing is being delivered. In this context, increased bed requirements in NA's will result in less interest from HEI's, lower values and less support available to help deliver general housing in mixed-use schemes. It also fails to appreciate the commercial risk NA's place on HEI's and

that overcommitting to NA's may make the product less attractive, which will in turn increase pressure on the private rental market in the area as the student numbers grow.

- 4.9 Therefore, criterion b. and c. should be removed or reworded to be consistent with the London Plan, not introduce requirements that HEI's do not want and to enable PBSA to help viability in mixed-used developments to support the delivery of general housing.

5 Recommendations

- 5.1 The current wording of Draft Condition H8 and overconcentration monitoring criteria in the supporting Implementation Table are insufficiently evidenced, inflexible and unsound with strategic policies.
- 5.2 The mechanistic approach also precludes the ability for proposals to be determined on their own merits and also does not take into account the continued growth of the HEI sector and local student numbers, or the benefits PBSA can bring to improving viability in mixed-use developments where it can help deliver affordable housing.
- 5.3 The approach to PBSA in the SM Neighbourhood is inconsistent with the National Planning Policy Framework (February 2025) paragraph 16 b) requirement for Local Plans to be prepared positively, in a way that is aspirational but deliverable. This approach also starkly conflicts with the strategic direction from the Government and Mayor of London to reduce overly restrictive policies to help accelerate housebuilding, unlock stalled sites and ensure more affordable homes are being built across the capital.
- 5.4 Accordingly, Policy D8 and MMs MM57 and MM58 are unsound on the basis it is not positively prepared, not justified based on evidence or consistent with strategic policies.
- 5.5 Therefore, we propose that the following changes to Draft Policy H8 should be made:
- **Part 1** – removal of this part on the basis there is no evidence to support a separate approach for the SM Neighbourhood and its inflexibility to allow for changes in PBSA delivery of the plan period;
 - **ALL Implementation Monitoring Criteria** – remove the second criteria restricting PBSA proposals where it would result in 800 beds within 300m, or reword to allow flexibility for locational considerations to be considered, such as its high-density character and proximity to university clusters, as well as other benefits like affordable housing arising from the proposals; and
 - **Part 4** – removal criterion b. and c. to be sound with the strategic policy in the London Plan Policy H15 and not place unreasonable additional requirements on proposals that make NA's harder and more costly to secure and result in impacts on wider viability of mixed-use proposals.
- 5.6 Our recommended wording changes are set out in **Appendix 3** and are required to ensure the policy is sound, implementable, positively prepared and supports meeting the demonstrable student need in the area and much needed housing delivery.

Appendix 1 – Stratford and Maryland Delivery

The below information is based on the London Legacy Development Corporation Annual Monitoring Reports, LBN's evidence and planning application details from LBN's planning website.

Table 5-1: PBSA Delivery and Applications in the Plan Period from 2023

Scheme Name	Application Ref	Net number of bed spaces	2.4:1 Ratio applied as per Main Modifications	Status
UCL East	17/00235/OUT_LLDC	1,276 (remaining in outline)	532	Approved
	18/00425/REM_LLDC	524	218	524 bed spaces completed in 2023/2024
Jubilee House	21/00483/FUL	716	298	Approved – September 2022 In construction
Poland House	20/00310/FUL	182	76	Approved – July 2021. In construction
Grove Crescent Road	21/02975/FUL	397	165	Approved – June 2023 In construction
IQL North	23/00441/FUL	909	379	Approved – November 2024 In construction
Plot M2, Car Park C, Westfield	24/00113/FUL_LLDC	520	217	Approved – November 2024

14 Marshgate Lane	23/00305/FUL	316	132	Approved – September 2024
302-312 Stratford High Street	25/01687/FUL	693	289	Approved – June 2026
East Village Plot N16	23/00101/FUL	504	210	Approved – April 2024
Land adjacent to Meridian Steps	22/00178/FUL	952	397	Approved – August 2024 In construction
University of East London Stratford Campus	23/00790/FUL	650	271	Approved – August 2025
Total		8,150	3,183	-

Table 5-2: Housing Delivery and Applications in the Plan Period from 2023

Scheme name	Ref	Houses	Status
Chobham Manor	11/90621/OUTODA/ 13/00504/REM 14/00356/REM 16/00518/REM (Dev Parcel 6) 16/00510/REM (parcel 6.3)	514	353 Completed – 2019/2022 161 Completed – 2022/2023
Cherry Park/Angel Lane	10/90061/OUTODA 15/00358/OUT	1224	Completed – 2022/2023
East Village N05	14/00066/REM	48	Completed – 2022/2023
East Village N08	14/00034/REM	481	Completed – 2019/2020

East Village N06	17/00045/REM	524	Completed – 2020/2021
61 Broadway	20/02402/PRECOU	7	Completed – 2023/2024
Sub-Total		2,798	(1,440 Completed from 2023)
Chobham Farm	12/00146/FUM, 15/00266/REM 17/00175/REM 19/00473/REM	863	In construction
Land adjacent to Stratford International Station, International Way	19/00391/FUL	380	In construction
Land at Legacy Wharf Phase 2	21/00395/FUL	196	In construction
14 Marshgate Lane	17/00669/VAR; and 21/00455/FUL_LLDC	317	In construction
Sub-Total		1,756	In construction
Stratford Waterfront North	18/00470/OUT 24/00067/REM & 24/00068/NMA	700	Consented but not commenced
Chobham Farm North	24/00063/FUL	106	Consented but not commenced
East Village Plot N18/19	23/00090/REM	848	Consented but not commenced
IQL North	23/00441/FUL	672	Consented but not commenced
IQL South Plot S1/S11	21/00416/FUL	350	Consented but not commenced
68-70 High Street, Stratford	24/01905/FUL	355	Resolution to grant

Rick Roberts Way Gasworks	23/00457/FUL	247	Consented but not commenced
	26/01059/NONMAT	Increased to 307	NMA submitted
Rick Roberts Way LCS PDZ12	24/00115/VAR_LLDC	398	Consented but not commenced
Carpenters Estate	22/00360/OUT	1443	Resolution to grant
James Riley Point	21/00543/FUL_LLDC	4	Consented but not commenced
Odelia Court, 1B SA4.3	21/00172/PRNSDB	22	Consented but not commenced
Bridgewater Triangle	21/00403/OUT_LLDC	575	OPP Consented but not commenced
	26/00274/VAR 26/00634/REM	Increased to 708	S73 and RMA submitted
Vulcan Wharf	20/00307/FUL	457	Consented but not commenced
Pudding Mill Lane	21/00574/OUT	956	Consented but not commenced
Land at Legacy Wharf (Phase 3) Pudding Mill	21/00460/FUL	343	Consented but not commenced
Carpenters Primary School	25/02425/LA3	120	Submitted application
Sub-Total		7,789	Consented but not commenced
Total		12,343	

Appendix 2 – Relevant Extracts from the MMs Draft Policy H8

Appendix 3 – Proposed Amendments to MMs Draft Policy H8

The following amendments are proposed to the Draft Policy H8 text and Implementation Table, with mark-ups in red.

H8: Purpose-built student accommodation

1. ~~New purpose-built student accommodation in Stratford and Maryland neighbourhood will only be supported where:~~
 - a. ~~it is located within or adjacent to an existing or approved campus development in the neighbourhood; or~~
 - b. ~~it is solely providing a replacement facility with no net increase in bed spaces.~~
2. New purpose-built student accommodation in all ~~other~~ neighbourhoods ~~outside Stratford and Maryland~~ will only be supported where:
 - a. it is located within or adjacent to an existing or approved campus development in the borough; or
 - b. it is in a town centre or local centre location well connected by public transport (with a minimum Public Transport Accessibility Level of 4); ~~and c.~~ and it will not create an over-concentrations saturation of purpose-built student accommodation; or
 - c. ~~d.~~ it is solely providing a replacement facility ~~with no net increase in bed spaces or it is located within or adjacent to an existing campus development in the borough.~~
3. **New purpose-built student accommodation should provide affordable student accommodation in accordance with the London Plan.** ~~New purpose-built student accommodation should provide at least 60 per cent affordable student accommodation as defined within the London Plan 2021. Developments for purpose-built student accommodation that do not achieve a policy compliant level of affordable student accommodation on site are required to submit a detailed financial viability assessment, demonstrating that the maximum viable mix will be delivered.~~
4. New purpose-built student accommodation should:
 - a. secure the majority of the bedrooms in the development, including all of the affordable student accommodation bedrooms, through a nomination agreement, for occupation by students of one or more higher education providers; ~~or~~
 - b. ~~in areas of over-saturation~~ concentration, ~~secure all of the bedrooms in the development through a nomination agreement, for occupation by students of one or more higher education providers; and~~
 - c. ~~where purpose-built student accommodation is being delivered within or adjacent to an existing or approved campus development in the borough in accordance with H8. part 1.a or H8. part 2.ad, the nominations agreement should be secured for occupation by students of the higher education provider that the development is located is within or adjacent to.~~
5. Developments delivering purpose-built student accommodation should provide ancillary communal space for study and ~~sporting facilities~~ exercise that meet the needs of the student population within a development unless the accommodation is located within 1,200 metres

of existing or approved student campus-based facilities for studying and/or ~~sport and recreation~~ exercise that have sufficient capacity to meet any increased need.

6. Developments for purpose-built student accommodation should include an appropriately detailed and resourced residential management plan.

Implementation Table

ALL	Recommended Change This policy will seek to monitor over-saturationconcentration of student bed spaces in each neighbourhood. For the purposes of this policy, over-saturationconcentration of purpose built student accommodation in a neighbourhood or resulting from a development is considered to be: - over 25 per cent of net residential approvals and completions over the plan period being delivered as purpose built student accommodation in a neighbourhood; and/or a proposal would lead to over 800 beds of student housing, including existing or approved purpose built student accommodation sites, being located within a radius of 300 metres from the proposal site an existing purpose built student accommodation site or approved development. <u>In assessing overconcentration, student accommodation will be measured using a ratio of the average number of students living in student only accommodation, using the published census data (based on the 2021 Census, 2.4 bedrooms would be counted as a single home). General needs housing will be measured on a unit basis.</u> <u>For the purposes of this policy only, adjacent to is defined as ‘being within 300 metres of’.</u> <u>For the purposes of this policy, ‘campus’ is defined as ‘a cluster of teaching and student facility buildings and purpose built student accommodation that serve a single college or university’.</u>
ALL	Alternative Change if Recommended Change not Accepted This policy will seek to monitor over-saturationconcentration of student bed spaces in each neighbourhood. For the purposes of this policy, over-saturationconcentration of purpose built student accommodation in a neighbourhood or resulting from a development is considered to be: - over 25 per cent of net residential approvals and completions over the plan period being delivered as purpose built student accommodation in a neighbourhood; and/or - a proposal would lead to over 800 beds of student housing, <u>including existing or approved purpose built student accommodation sites</u>, being located within a radius of 300 metres from <u>the proposal site</u> an existing purpose built student accommodation site or approved development. <u>In assessing overconcentration, student accommodation will be measured using a ratio of the average number of students living in student only accommodation, using the published census data (based on the 2021 Census, 2.4 bedrooms would be counted as a single home). General needs housing will be measured on a unit basis.</u> Where proposals positively achieve the first criteria but fail the second, other policy considerations should be taken into account, such as strategic growth policies, designations, proximity to clusters of HEI and other benefits arising from the scheme, including affordable housing.

	<u>For the purposes of this policy only, adjacent to is defined as ‘being within 300 metres of’.</u> <u>For the purposes of this policy, ‘campus’ is defined as ‘a cluster of teaching and student facility buildings and purpose built student accommodation that serve a single college or university’.</u>
H8.1	Part 1 of the policy sets out spatial requirements for the delivery of purpose built student accommodation in the Stratford and Maryland Neighbourhood. In the Stratford and Maryland neighbourhood, developments for purpose built accommodation will only be permitted where they either deliver a campus-based expansion linked to an existing higher education campus in the neighbourhood or are replacing an existing facility. In the case of campus-based expansions, these developments should be located within or adjacent to an existing campus development in the borough. Replacement accommodation should only re-provide the same number of bedrooms as the existing development and should not result in a net increase of student bed spaces.
H8.2	Part 2 1 of the policy sets out spatial requirements for the delivery of purpose built student accommodation in all other neighbourhoods outside of Stratford and Maryland Neighbourhood. Accommodation should either be directed to campus developments within Newham, or to town centre or local centre locations that are well-connected by public transport, with a minimum base year Public Transport Accessibility Level of 4. Forecast Public Transport Accessibility Level increases may be considered where there is sufficient certainty improvements to Public Transport Accessibility will be delivered (for example, a public transport improvement project linked to the forecast increase is underway). Where a new development would lead to an over-saturation, concentration of student accommodation in a neighbourhood (see definition of over-saturation, concentration in the ‘ALL’ implementation text for Policy H8 above), accommodation should either: only re-provide the same number of bedrooms as the existing development and should not result in a net increase of student bed spaces <u>solely provide a replacement facility</u>; or - deliver a campus-based expansion linked to an existing higher education campus in the neighbourhood. These developments should be located within or adjacent to an existing campus development in the borough.
H8.3	Affordable student accommodation is defined in the London Plan 2021 Policy H15, with the appropriate rent level published annually within the Mayor of London’s Annual Monitoring Report. Developments that fail to provide affordable student accommodation in line with the requirements of part 3 of the policy will be required to provide a detailed financial viability assessment, demonstrating that the maximum viable mix will be delivered. This viability assessment should use a Benchmark Land Value that uses an Existing Use Value plus premium approach. The viability assessment will be independently assessed. These developments will also be subject to review mechanisms as set out in Local Plan Policy BFN4.

H8.4	Areas of over saturation<u>concentration</u> will be assessed in accordance with the definition of over saturation<u>concentration</u> in the 'ALL' implementation text for Policy H8 above. In areas that don't experience over saturation<u>concentration</u> of purpose-built student accommodation, tThe majority of purpose-built student rooms are required to be secured through a nominations agreement as part of a development's legal agreement. This agreement should ensure that reasonable endeavours are used to secure the majority of the bedrooms in the development, including all of the affordable student accommodation bedrooms, for occupation by students of one or more higher education providers by the point of first occupation. At pre-application stage, a letter of comfort should also be provided by the interested Higher Education Provider(s), showing the provider's intent to continue discussions with the developer and indicate their likelihood to enter into contractual obligations with the developer in relation to the proposals. The letter of comfort should also outline the provider's present and future accommodation needs, and how the design of the development meets these needs. If a nominations agreement cannot be secured by the point of first occupation, the local planning authority should be notified to show that all reasonable endeavours have been taken. In the interim, a cascade mechanism of direct lets should be secured. The following hierarchy will be applied: • full-time higher-education students at local Higher Education Providers (within Newham's borough boundary). • those at other London HEPs with good sustainable transport connections to the site. • any other higher-education student at a London HEP campus. • as a last resort, any other higher-education student with a need to reside in London. Proposals that would create or worsen an over saturation<u>concentration</u> of purpose-built student accommodation should secure all of the bedrooms in the development through a nomination agreement with a higher education provider(s). Where purpose-built student accommodation is being delivered within or adjacent to an existing campus development in the borough in accordance with H8. part 1.a or H8. part 2.a, the policy requires the nominations agreement to be secured for occupation by students of the higher education provider that the development is located is within or adjacent to. Proposals creating an over saturation<u>concentration</u> will need to provide additional certainty around a nominations agreement being signed prior to first occupation of the development in accordance with the requirements of parts 4.b and 4.c of the policy. Developments seeking to comply with parts 4.b and 4.c of the policy will not have a cascade mechanism of direct lets forming part of their legal agreement. Without sufficient certainty of nominations provided throughout pre-application and application discussions, an application will be refused. In order to demonstrate certainty around a nominations agreement being signed, it is expected that the Higher Education provider(s) who are expected to sign up to a development's nominations agreement attend pre-application meetings for a proposal. This is to demonstrate that the design of a development has taken into consideration the
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	needs of the Higher Education provider whose students the development will be accommodating.
H8.5	Developments for purpose-built student accommodation should provide ancillary communal space for study and sports and recreation<u>exercise</u> to meet the needs of their student population proportionate to the scale of the development. There is an exception to this requirement where existing campus-based student study and/or sports and recreation<u>exercise</u> spaces are within 1,200m of the development (a 15 minute walk, to support the delivery of a network of well-connected neighbourhoods) and have the capacity to meet the increased need from the new development, which would need to be evidenced as part of a submission. Regarding the provision of sports<u>exercise</u> facilities, consideration should be given to how affordable the facilities are for students to access, recognising this provision should be meeting the needs of students living in the new accommodation. Developments delivering new or expanded education floorspace alongside the provision of student accommodation should also meet the requirements of Policy SI4. This policy contains specific requirements on providing access to other community uses outside of core hours.
H8.6	Residential management plans should outline management practices that minimise safeguarding risks, maximise opportunities for students to create and sustain social networks and access appropriate support, and ensure that the development minimises amenity impacts. Regarding appropriate support, a development's residential management plan should set out how students can conveniently access staff who can offer trained pastoral support, with links to the Higher Education provider(s) signed up to the nominations agreement. Residential management plans should also include details of: safeguarding practices; health and safety procedures; the maintenance of the accommodation and any communal spaces provided; and how the accommodation will be used outside of term time.

Appendix 4 – Draft Knight Frank Report

Stratford Cross PBSA Demand and Market Assessment

03 March 2026

Confidential

Stratford Cross

Prepared for Lendlease

knightfrank.com/research

KF Ref: Stratford Cross 2026

Contacts

Prepared by



Alistair Walters
Senior Research Analyst
Global Living Sectors Research



Sera Esmene
Analyst
Data Curation



Reviewed by



Matthew Bowen
Partner
Research



Client

Lendlease
1 Eversholt Street, London, NW1 2DN, United Kingdom

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1. Introduction

Knight Frank Living Sectors Research and Knight Frank Student Property have been instructed by Lendlease to produce a bespoke analysis of the student housing market in Stratford. This is in support of a proposed purpose-built student accommodation (PBSA) scheme in Stratford, E20 1JQ.

The development will deliver 1,300 high quality student bedrooms with associated student amenity and facilities.

This research assesses the demand for student accommodation across, Stratford and the immediate catchment surrounding the proposed site.

The report provides the following analysis:

- Demand side drivers – socio-economic profile, growth projections.
- Existing supply of student accommodation – existing PBSA, HMO accommodation within the mainstream rental market.
- Development pipeline – across London and within proximity to the scheme.
- Housing market profile - supply and demand balance, and pricing trends.

Catchment

We have assessed demand across London and where applicable presented demand/supply metrics at lower levels of geography based on distance from the proposed scheme. This reflects the location of the site and travel times to and from Higher Education Providers (HEPs) and other amenities.

The closest HEPs of significance¹ are listed below in 2024/25 full-time student population size descending:

- University of the Arts London
- University College London
- Queen Mary University of London
- King's College London
- The University of East London

The proposed scheme is in a location that is readily accessible by cycle and public transport (underground, National Rail and bus) to the university campuses. The scheme is a 7 minute walk from Stratford train station, offering easy access to wider London.

The site has a Public Transport Access Level (PTAL) rating of 6b and therefore demonstrates an excellent level of connectivity. The PTAL rating combines information about how close public transport services are to a site and how frequent these services are. The highest level of connectivity has a PTAL of 6b and the lowest has a PTAL of 0. As per the London Plan, sites with better connectivity provide opportunities for development at higher densities and for sustainable development that reduces the need to travel by car.

The London Borough of Newham's approach to student accommodation

Policy H8, as set out in Newham's emerging Local Plan evidence base, outlines the borough's view on purpose-built student accommodation (PBSA).

Newham supports new PBSA where it contributes to meeting identified student housing needs while also aligning with the borough's wider objective to deliver mixed, inclusive neighbourhoods and avoid over-concentration. To achieve this, proposals must follow a clear policy framework requiring high-quality design, good management arrangements, and well-integrated communal and study spaces.

¹ This is defined as the five HEPs with the most full time students whose term time address is registered within 1.5 miles of E20 1JQ for the 2024/25 academic year. This has been calculated using paid-for HESA data, not all institutions permit their data to be used for this purpose but this method captures c.96% of all full time students nationally.

In addition, developments must demonstrate that they fit within Newham's overall housing strategy, which prioritises delivering large numbers of new homes (particularly genuinely affordable housing) and ensuring new schemes do not undermine delivery of conventional housing. PBSA schemes are expected to secure nominations agreements with higher education institutions, provide an element of affordable student accommodation, and ensure accessibility, including rooms adaptable for wheelchair users.

The Council recognises the role PBSA can play in relieving pressure on the wider private rental sector and supporting London's higher-education ecosystem, but this must be balanced with ensuring high-quality placemaking, neighbourhood integration, and adequate local amenities. This approach sits within Newham's ongoing Local Plan review, which aims to deliver sustainable growth while responding to changing housing needs across the borough.

The London Plan

The new London Plan (The Spatial Development Strategy for Greater London) CD (3.26) was published in March 2021 following a 'rigorous process of consultation and an Examination in Public, in which 300 different organisations or individuals participated'. The Plan includes a policy on purpose-built student accommodation (Policy H15) which states that Boroughs 'should seek to ensure that local and strategic need for purpose-built student accommodation is addressed', provided that:

- The development contributes to a mixed and inclusive neighbourhood.
- At least 35% of the student accommodation is 'affordable'. 'Affordable' is defined as 'the rental cost for the academic year is equal to or below 55% of the maximum income that a new full-time student studying in London and living away from home could receive from the government's maintenance loan for living costs for that academic year.'
- Majority of the rooms are secured through a nominations agreement by a higher education provider (unless all rooms qualify as 'affordable'). There is no requirement for the higher education provider linked by the agreement to the PBSA.
- The scheme contributes to the London's housing need outlined in the 2017 London Strategic Housing Market Assessment (SMHA) (CD3.70).

The Plan identifies a strategic requirement of 3,500 additional PBSA bed spaces per annum. The need for PBSA is not considered in terms of Borough, but in regard to higher education providers, growth and availability. The Policy also states that Boroughs should be 'encouraged to develop student accommodation in locations well-connected to local services by walking, cycling and public transport.'

The Mayor has carried out a London-wide Strategic Housing Market Assessment (SHMA) and Strategic Housing Land Availability Assessment (SHLAA) (CD3.71). The SHMA has identified need for 66,000 additional homes per year over the next ten years. The SHMA covers overall housing need as well as exploring specific requirements for purpose-built student accommodation and specialist older persons' accommodation within the overall figure.

The plan states that ten-year housing targets should be monitored in net terms taking into account homes lost through demolition, amalgamations or change of use. Net non-self-contained accommodation for students should count towards meeting housing targets on the basis of a 2.5:1 ratio, with two and a half bedrooms/units being counted as a single home.

Existing HEP campuses of significance for Stratford Cross

Within a 1.5-mile radius of the scheme, the three principal Higher Education Provider (HEP) campuses are shown below in descending order of student population:

University of the Arts London (London College of Fashion and other campuses)

- University of the Arts London has the largest cohort of full time students living within a 1.5 mile radius of Stratford Cross, accessible by foot (12 minutes). The university is ranked 35th in the Times Good University Guide 2026.
- UAL's long-term strategic direction is shaped by its UAL 2032 Strategy, which centres on the mission "*the world needs creativity*." The strategy focuses on delivering transformative creative education, widening participation, driving research and innovation, strengthening global partnerships, and building a sustainable, student-centred institution.

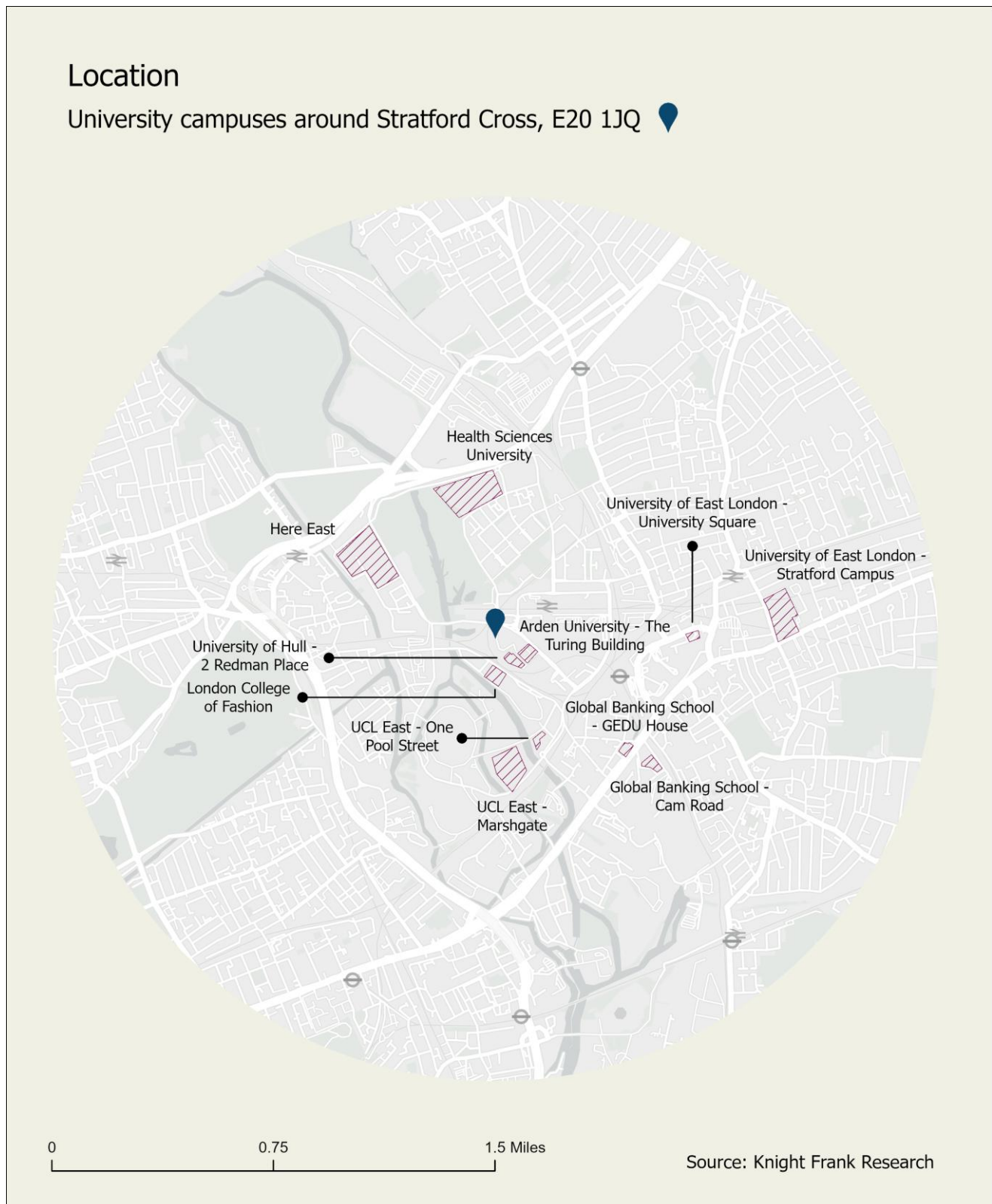
University College London

- University College London hosts the second most full time students in the area surrounding Stratford Cross, marked by UCL East campus students. By public transport this takes 11 minutes, bike 6 minutes, and walking 11 minutes. UCL main campus is also accessible by public transport (31 minutes) and bike (40 minutes). The university is ranked 9th in the Times Good University Guide 2026.
- The UCL Strategic Plan 2022-27 places emphasis on a clear and transparent programme of long-term investment in their academic priorities for the future. The university plans to invest in staff, facilities, teaching resources and deliver long-term financial resilience.

Queen Mary University London

- For the 1.5-mile radius, Queen Mary University London has the third largest cohort of full time students. By public transport, Stratford Cross is 19 minutes away, and by cycle, 14 minutes.
- Queen Mary University of London's Strategy 2030 aims to become "*the most inclusive university of its kind, anywhere*," focused on opening doors of opportunity and fostering an environment where diverse students and staff can flourish. Its mission centres on generating and challenging knowledge for the public good while engaging locally and globally, underpinned by core values of being inclusive, ambitious, proud, collegial and ethical.

Figure 1: **Location Map and Connectivity**



2. Student Demand Profile

2.1 Student Population Profile

Data comment

The data utilised in this section is from a paid for HESA dataset which allows us to analyse the number of students studying or living in specific locations rather than the aggregated view which is available in their open data online.

Not all HEPs permit their data to be used in the paid for dataset – these HEPs represent 4% of the total full time student population in the UK. However, once BPP University, the University of Law, Arden University and Falmouth University are accounted for, this figure falls to just 1%. For this study, this means that when referring to study location and living location we will not pick up students at these institutions and others which do not e

Arden University has recently opened a campus in Stratford as part of its hybrid learning strategy and so we will reference this but will not be able to report the number of students studying in Stratford or living around the site at this institution as the data is not available.

Any data referring to a 1.5 mile radius is calculated using the number of full time students whose term time addresses are registered within LSOAs whose centroids are within 1.5 miles of the scheme.

The proposed scheme benefits from good connectivity to the local and wider area through public transport and as such, the demand for PBSA, as part of the proposed development has been broken down into two components:

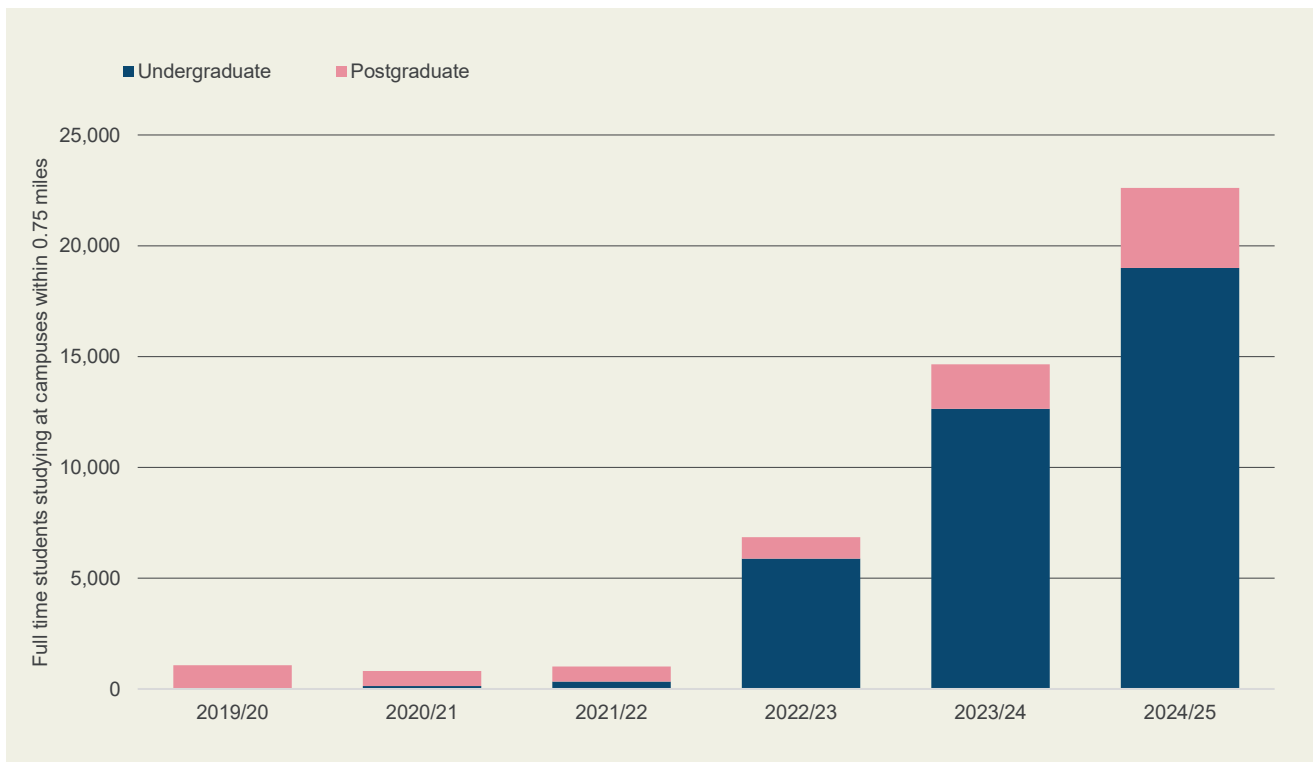
1. Students studying at Higher Education Providers in the local area.
2. Students who live in the immediate catchment (1.5-mile radius from E20 1JQ)
3. Higher Education Providers that are most relevant to the existing student population within the local area of E20 1JQ.

2.1.1 Students studying at Higher Education Providers in the local area

Stratford Cross is located excellently between a series of newly developed and developing campuses in the Stratford area. Using the 300m which is referred to in Newham Council's H8 policy, this would include the University of the Arts: London College of Fashion and the Turing building which currently hosts campuses for Arden University and the University of Hull (opening in June 2026). Using HESA 2024/25 data for the University of the Arts' campus, there were 5,279 full time students studying at the London College of Fashion and following conversations between Lendlease and Arden University, 2,000 students are studying at the Turing Building – a total of c.7,750 students within 300m with the University of Hull expected to add to this further once opening.

Once we look beyond the immediate 300m radius, but still within a compact 1.25km (around 0.7 miles), there were 22,603 full-time students studying at campuses in this area – underscoring the scale of the emerging educational hub in Stratford. Notably, this figure has increased at a rapid rate as campuses have opened in recent years. The layout of the area, particularly around Queen Elizabeth Park, creates open space between Here East and the UCL East campuses. As a result, Stratford Cross is one of the closest and most accessible locations in Newham for students attending these institutions. While students could choose to live further east, such as in Hackney Wick or around Bow Road, the growing concentration of educational facilities, ongoing commercial development, and excellent access to the Elizabeth Line mean that Stratford is still a highly attractive option, even for those studying more than 300m away.

Figure 2: **Full time students studying within 0.75 miles of Stratford Cross**



Source: Knight Frank Research, HESA

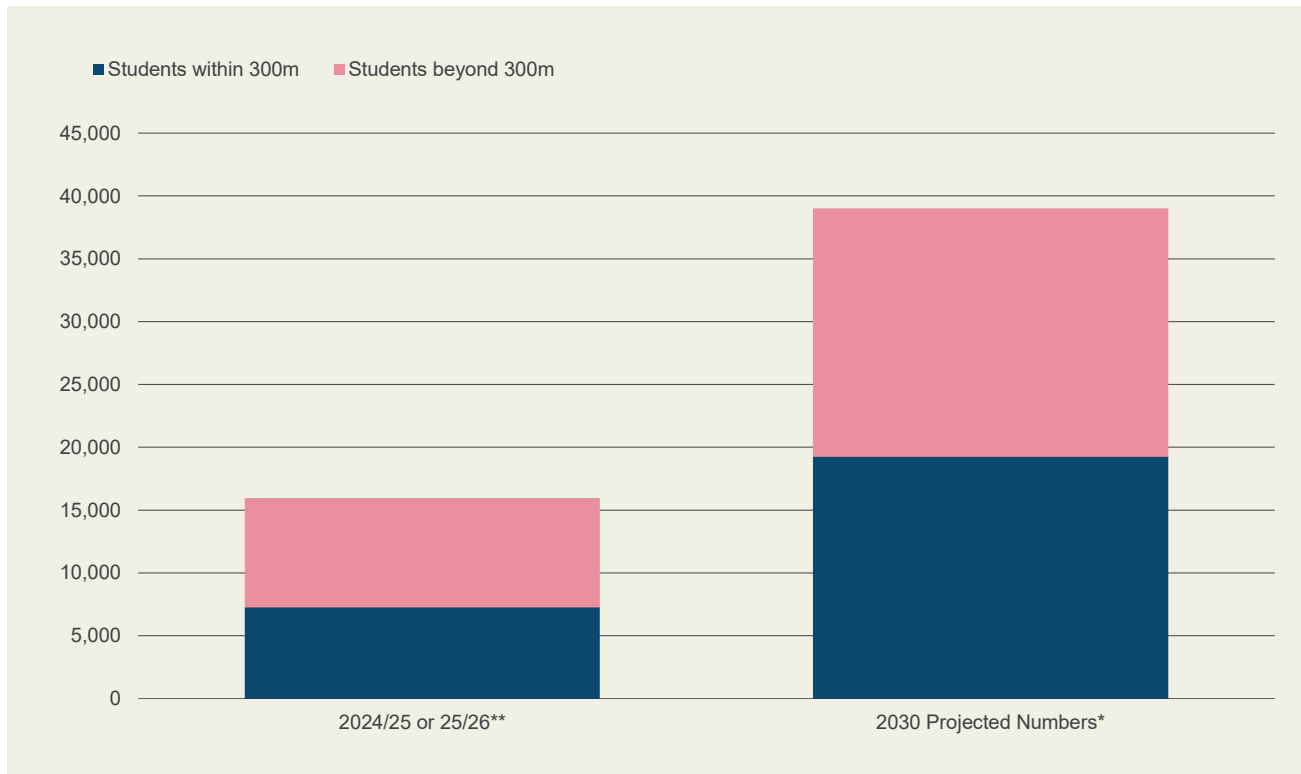
Given the scale of increase in the number of students studying in the Stratford area, conventional methods of projecting students are not feasible due to the scale of growth in such a short period of time. In place of this, Lendlease through conversations with universities and Higher Education Providers², have secured projections from a handful of key institutions who are expected to be key drivers of local demand for the proposed development.

From this we see that institutions are looking to rapidly increase in size with UEL Stratford and Arden University hoping to add c.18,500 students by 2030. In total the number of students at these institutions is projected to more than double to nearly 40,000, highlighting the current and future need for student accommodation in the area.

When looking at the projections for campuses inside 300m, Arden University has significant growth ambitions (adding 10,000 students by 2030), the University of Hull hopes to have 2,000 students by 2030 and a figure is not available for UAL's London College of fashion. Grouping these together (and using the HESA 2024/25 figure for UAL's LCF – conservative measure), there are projected to be just over 19,000 students studying within 300m of Stratford Cross – a number more than double the current figure.

² Institutions include UAL's London College of Fashion, UEL Stratford, Staffordshire University – Digital Institute London, Loughborough University – Stratford, UCL East, Arden University, Hull University, Charles Darwin University.

Figure 3: **Students studying at key local campuses to Stratford Cross***



Source: Knight Frank Research, HESA, *Institutions include UAL's London College of Fashion, UEL Stratford, Staffordshire University – Digital Institute London, Loughborough University – Stratford, UCL East, Arden University, Hull University, Charles Darwin University. **HESA 24/25 has been used for all institutions apart from UEL: Stratford, Loughborough University – Stratford, Arden University where Lendlease has provided 2025/26 data. A projection was not available for UEL's London College of Fashion so the 2024/25 figure has been used in the projection which is a conservative measure.

2.1.2 Students living within a 1.5-mile radius catchment area

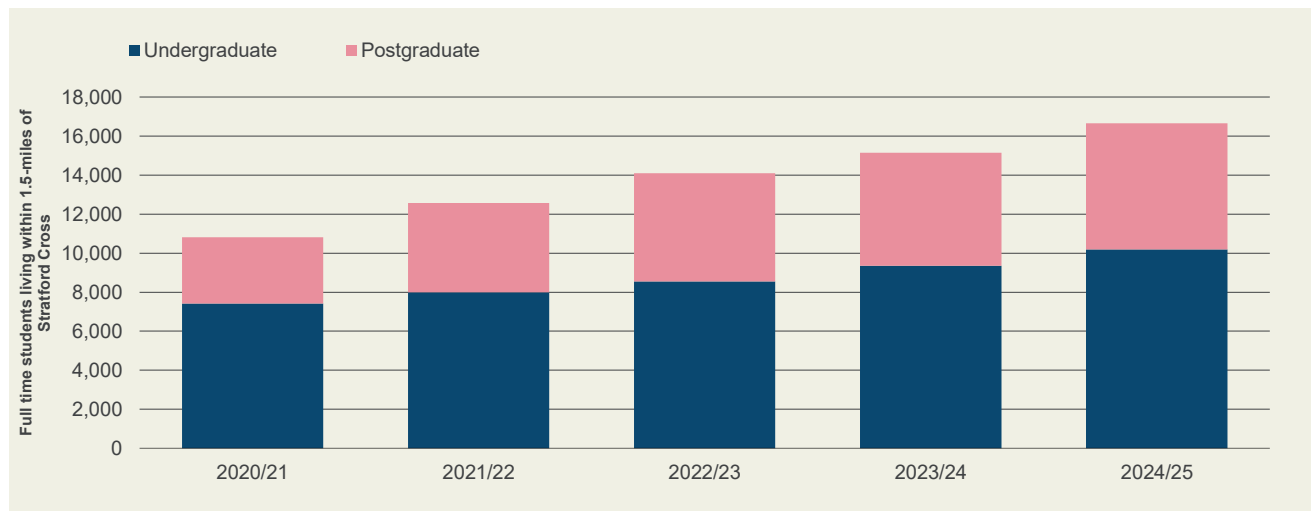
- In the 2024/25 academic year, there were 16,649 full-time students living within the 1.5-mile radius of the proposed scheme at Stratford Cross. The largest cohort of these students were studying at The University of the Arts London (13.0%), University College London (11.2%), Queen Mary University London (9.9%), King's College London (7.8%), The University of East London (6.6%).
- The total number of full-time students living within this catchment has increased by 54% over the period of 2020/21 to 2024/25.
- Full-time undergraduates account for 61.2% of all students living in the catchment with 10,190 full-time students. This number has increased by 37.2% over the 2020/21 to 2024/25 period. During this same period, the number of full-time postgraduates has increased by 90.6% to 6,459 students, representing 38.8% of students in the 2024/25 academic year.
- Full-time non-UK domiciled students represent 49.9% (8,313) of total fulltime students living within 1.5-mile. Their number has increased by 118.8% over the period 2020/2021 to 2024/25.
- In the 2024/25 academic year, there were 8,336 full-time UK domiciled students living within a 1.5-mile catchment of the Stratford Cross site. UK students represented 50.1% of total full-time students in 2024/25 and since 2020/21 this figure has increased by 18.8%.

Table 1: Full time student population within 1.5-miles of Stratford Cross

	2020/21	2021/22	2022/23	2023/24	2024/25	YOY %	2024/25 vs 2020/21
Undergraduate UK	6,022	6,435	6,830	7,154	7,340	2.6%	21.9%
Postgraduate UK	992	979	1,006	873	996	14.1%	0.4%
Total UK	7,014	7,414	7,836	8,027	8,336	3.8%	18.8%
Undergraduate Non-UK	1,403	1,556	1,717	2,199	2,850	29.6%	103.1%
Postgraduate Non-UK	2,396	3,604	4,541	4,918	5,463	11.1%	128.0%
Total Non-UK	3,799	5,160	6,258	7,117	8,313	16.8%	118.8%
Total Undergraduate	7,425	7,991	8,547	9,353	10,190	8.9%	37.2%
Total Postgraduate	3,388	4,583	5,547	5,791	6,459	11.5%	90.6%
Total	10,813	12,574	14,094	15,144	16,649	9.9%	54.0%

Source: Knight Frank Research, HESA

Figure 4: **Full-time student population, within the 1.5-mile radius of Stratford Cross**



Source: Knight Frank Research, HESA

Students living in Newham

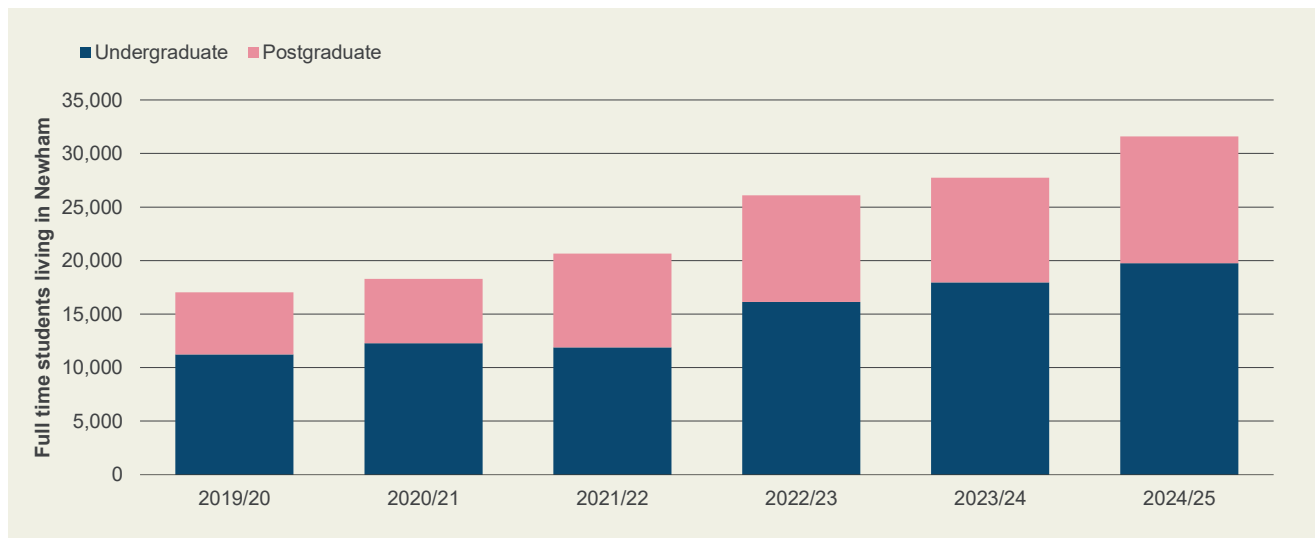
- In the 2024/25 academic year, there were 31,590 full time students listing their term time address within the London Borough of Newham. UK domiciled students accounted for 50.6% of the total full time students with non-EU students being the next largest domicile group with 48.0%.
- The number of students living in Newham has increased by 85.5 between 2019/20 and 2024/25 with a strong single year growth to 2024/25 of 13.9%.
- The most significant growth has been amongst the Non-EU domicile which has increased by over 164.8% between 2019/20 and 2024/25, largely driven by postgraduate growth.
- Full time undergraduate students account for 65.2% of full time students living in Newham during term-time.

Table 2: **Full time student population living in Newham during term time**

	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	YOY %	2024/25 vs 2019/20
Undergraduate UK	9,123	10,113	9,573	13,486	14,383	14,797	2.9%	62.2%
Postgraduate UK	1,128	1,242	1,073	1,205	1,145	1,195	4.4%	5.9%
Total UK	10,251	11,355	10,646	14,691	15,528	15,992	3.0%	56.0%
Undergraduate Non-EU	1,327	1,356	1,723	2,160	3,208	4,695	46.4%	253.8%
Postgraduate Non-EU	4,402	4,568	7,545	8,621	8,479	10,478	23.6%	138.0%
Total Non-EU	5,729	5,924	9,268	10,781	11,687	15,173	29.8%	164.8%
Undergraduate EU	774	800	594	487	377	250	-33.7%	-67.7%
Postgraduate EU	272	223	138	135	140	175	25.0%	-35.7%
Total EU	1,046	1,023	732	622	517	425	-17.8%	-59.4%
Total Undergraduate	11,224	12,269	11,890	16,133	17,968	19,742	9.9%	75.9%
Total Postgraduate	5,802	6,033	8,756	9,961	9,764	11,848	21.3%	104.2%
Total	17,026	18,302	20,646	26,094	27,732	31,590	13.9%	85.5%

Source: Knight Frank Research, HESA

Figure 5: **Full-time student population living in Newham, by level of study**



Source: Knight Frank Research, HESA

Students at Arden University

Arden University is a privately run institution which educates students across the UK and internationally which in 2025 opened up a Stratford campus (Turing Building) to accommodate students following a hybrid approach to learning.

Arden University is one of the institutions which does not allow its data to be used to identify the study location or term time address of its students, so we cannot be sure as to how many students study at their Stratford campus. However, Arden University as an institution had 23,980 full time students in the 2024/25 academic year, an increase of 17% on 2023/24 and significant growth on its 2019/20 number of 3,405. This highlights that this is a growing institution and the addition of their campus to the Stratford area not only serves as a vote of confidence in the area as hub for higher education but also brings the potential to increase the number of students in the area beyond our estimate, based on HESA data.

Whilst the above is true, Lendlease has a relationship with Arden University and subsequently informed us that there are 2,000 students studying at the Arden University Stratford campus with plan to grow to 12,000 students by 2030.

2.1.3 Students studying at HEPs with significant cohorts currently living in the Stratford Cross catchment area

The total number of students studying at the five Higher Education Providers who host the largest numbers of students living within the 1.5 mile radius, has also increased throughout the period. In 2024/25 these universities collectively hosted 137,204 in London, the largest being University College London, with 45,234 students. King's College London, and Queen Mary University London hosted 31,355 and 23,439 students respectively, and University of the Arts London and the University of East London hosted 20,926 and 16,250 students respectively.

Table 3: Significant HEPs amongst students living within 1.5 miles of Stratford Cross*

Full time students	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	YOY %	2023/24 vs 2019/20
UCL	34,933	39,614	39,942	45,831	45,234	44,294	-2.1%	26.8%
King's College London	27,564	31,278	33,769	32,552	31,355	32,550	3.8%	18.1%
Queen Mary London	19,357	20,477	21,839	22,273	20,926	21,101	0.8%	9.0%
University of the Arts	20,082	21,941	24,032	24,072	23,439	21,870	-6.7%	8.9%
East London University	13,220	15,365	17,462	18,067	16,250	22,085	35.9%	67.1%
Total	115,156	128,675	137,044	142,795	137,204	141,900	3.4%	23.2%

Source: Knight Frank Research, HESA, *This data is for the whole institutions – not students living in the catchment area. This is to demonstrate the growth of the institutions and the impact which this has had on the local area and may do

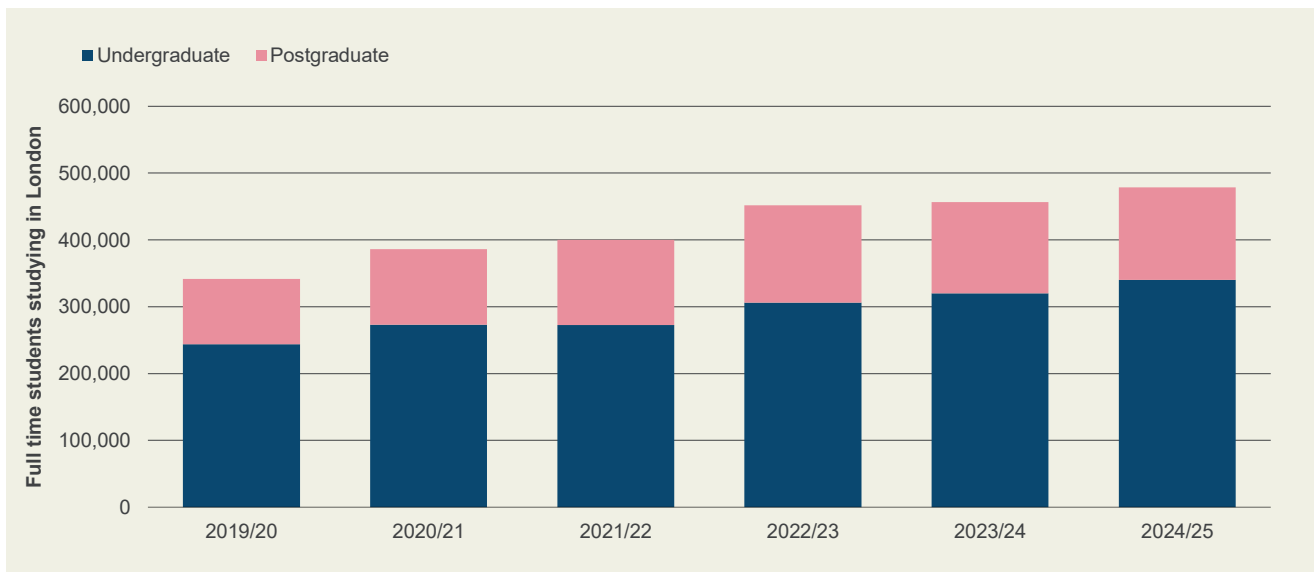
- Over the period 2019/20 to 2024/25, full-time students studying at the above institutions in London have increased by 23.2%.
- The total number of full-time undergraduates studying at these HEPs represent 63.5%, (90,040) of the full-time student population. The number of full time undergraduates has increased by 15.8% between 2019/20 and 2024/25.
- Full-time postgraduates have also seen increases over the same period, from 37,414 to 51,860, a 38.6% increase.
- Full-time international students represent 50.7% (71,886) of full-time students studying at these institutions. Of this, 65,163 are non-EU students, and 6,723 are domiciled in the EU. Non-EU students have grown by 63.7%, whilst EU student numbers have dropped by 50.2%.
- UK students represent the other 49.3% of full time students (70,014). Their numbers between 2019/20 and 2024/25 increased by 13.2% over this period.

Table 4: Significant HEPs amongst students living within 1.5 miles of Stratford Cross*

Full time students	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	YOY %	2024/25 vs 2019/20
Undergraduate UK	48,182	51,522	56,022	54,550	54,826	55,211	0.7%	14.6%
Postgraduate UK	13,683	15,810	14,645	16,977	15,646	14,803	-5.4%	8.2%
Total UK	61,865	67,332	70,667	71,527	70,472	70,014	-0.6%	13.2%
Undergraduate Non-EU	19,889	22,725	25,372	28,126	28,926	30,649	6.0%	54.1%
Postgraduate Non-EU	19,910	23,860	29,087	33,554	30,257	34,514	14.1%	73.4%
Total Non-EU	39,799	46,585	54,459	61,680	59,183	65,163	10.1%	63.7%
Undergraduate EU	9,671	10,557	9,033	6,729	4,973	4,180	-15.9%	-56.8%
Postgraduate EU	3,821	4,201	2,885	2,859	2,576	2,543	-1.3%	-33.4%
Total EU	13,492	14,758	11,918	9,588	7,549	6,723	-10.9%	-50.2%
Total Undergraduate	77,742	84,804	90,427	89,405	88,725	90,040	1.5%	15.8%
Total Postgraduate	37,414	43,871	46,617	53,390	48,479	51,860	7.0%	38.6%
Total	115,156	128,675	137,044	142,795	137,204	141,900	3.4%	23.2%

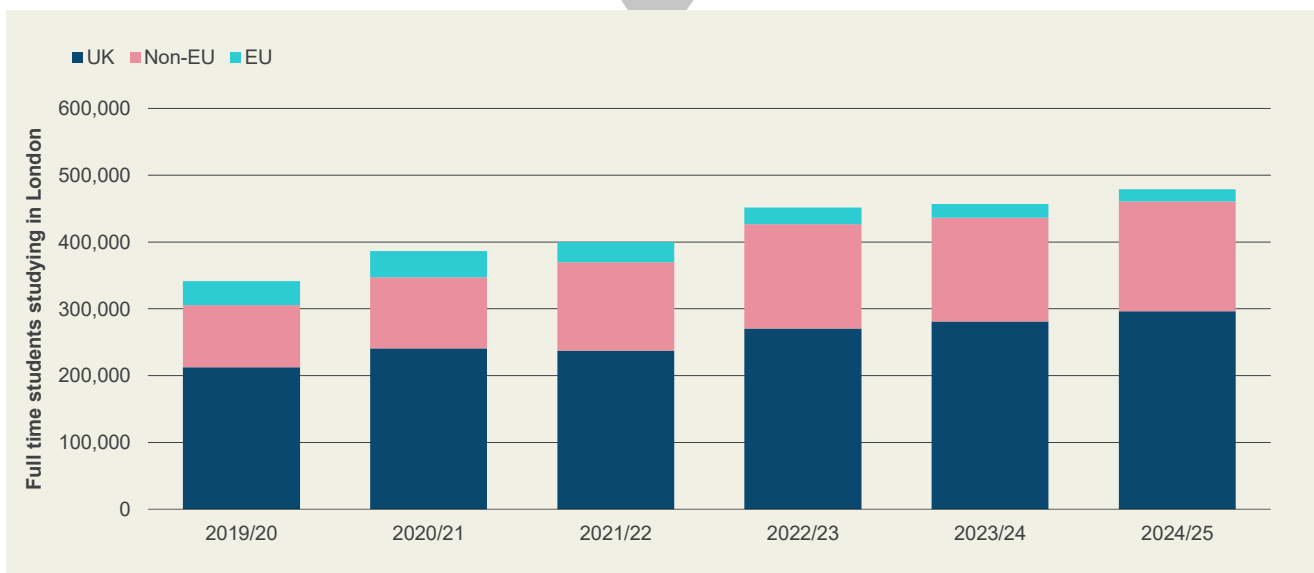
Source: Knight Frank Research, HESA, *UCL, King's College London, Queen Mary's London, University of the Arts, East London University.

Figure 6: Full time students by level of study, studying in London (including main and satellite campuses, excluding Kingston)



Source: Knight Frank Research, HESA

Figure 7: Full time students by domicile, studying in London (including main and satellite campuses, excluding Kingston)



Source: Knight Frank Research, HESA

2.2 Acceptances and Applicants

In 2025, higher education providers based in London³ received applications from 501,095 applicants for places, which is 17.7% higher than in 2019. In 2025, the offer rate for university applications was 57.7%. Acceptances of places at London based HEPS have increased by 19.8% since 2019.

Table 5: London Universities, UCAS Acceptances and Applicants

Year	Acceptances	Applicants	Offer Rate
2019	76,120	425,635	60.2%
2020	84,220	438,505	62.5%
2021	82,600	474,185	56.1%
2022	82,325	493,970	52.6%
2023	80,295	488,110	51.9%
2024	87,220	493,125	55.4%
2025	91,215	501,095	57.7%
YOY	4.6%	1.6%	4.1%
2019 vs 2025	19.8%	17.7%	-4.2%

Source: Knight Frank Research, UCAS

Table 6: University of the Arts London, UCAS Acceptances and Applicants

Year	Acceptances	Applicants	Offer Rate
2019	4,650	18,390	41.6%
2020	5,295	17,915	44.8%
2021	4,510	17,270	41.9%
2022	5,240	20,705	37.6%
2023	5,110	20,720	38.5%
2024	5,765	21,015	42.8%
2025	6,260	21,330	47.3%
YOY	8.6%	1.5%	4.5%
2019 vs 2025	34.6%	16.0%	5.6%

Source: Knight Frank Research, UCAS

Table 7: UCL, UCAS Acceptances and Applicants

Year	Acceptances	Applicants	Offer Rate
2019	6,110	51,155	47.5%
2020	9,145	53,990	53.5%
2021	8,140	62,370	36.1%
2022	7,530	68,265	29.4%
2023	7,595	70,635	25.9%
2024	9,115	70,360	34.5%
2025	11,470	77,535	44.2%
YOY	25.8%	10.2%	9.7%
2019 vs 2025	87.7%	51.6%	-3.3%

Source: Knight Frank Research, UCAS

³ Over 100 accepted applicants for the 2025/26 academic cycle

Table 8: **Queen Mary University London, UCAS Acceptances and Applicants**

Year	Acceptances	Applicants	Offer Rate
2019	5,070	32,970	65.6%
2020	5,485	33,275	66.5%
2021	6,385	36,460	66.3%
2022	5,575	40,195	63.2%
2023	4,805	39,640	62.7%
2024	4,785	40,640	65.3%
2025	5,920	41,780	66.3%
YOY	23.7%	2.8%	1.0%
2019 vs 2025	16.8%	26.7%	0.6%

Source: Knight Frank Research, UCAS

2.3 Projecting future student numbers across London

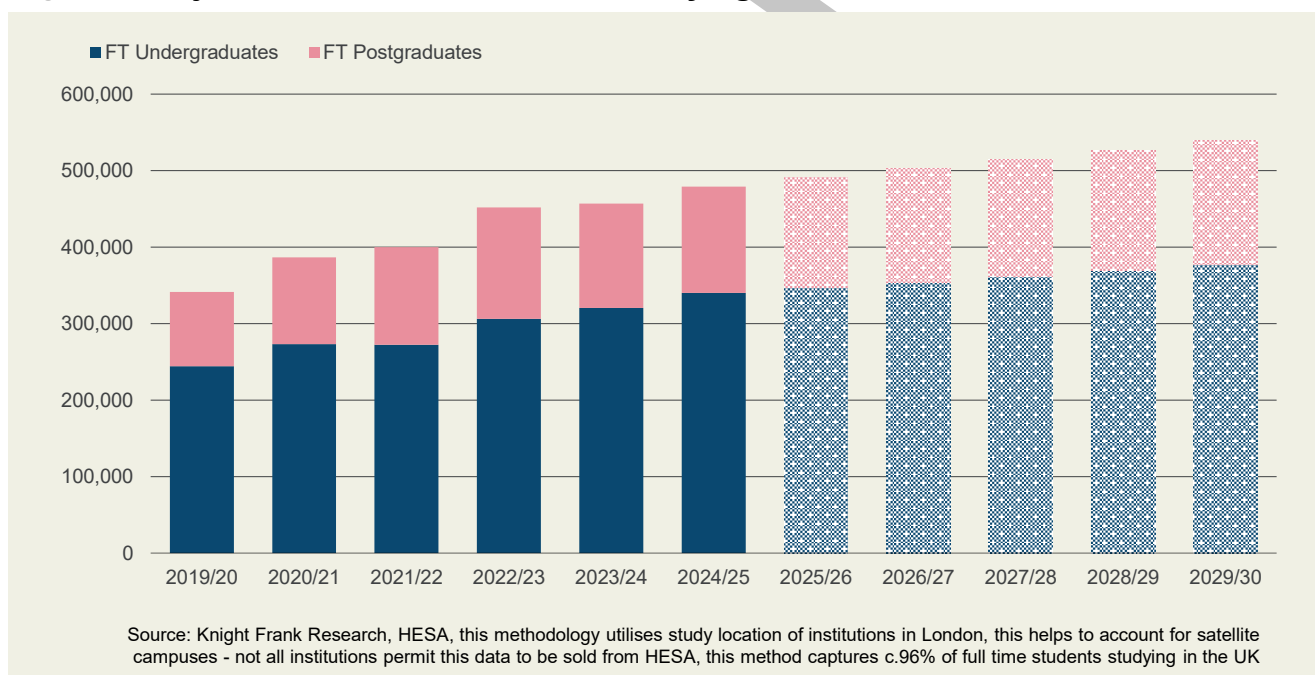
Knight Frank Research has conducted an analysis using five-year historic trends in changing full time student numbers studying in London. This analysis was conducted across aggregated data for all Higher Education Providers with both main and satellite campuses in London. This excludes institutions which do not permit their data passed onto HESA (see data comment as the start of section 2).

Based on previous trends for key student groups, the total number of full-time students studying at HEPs within London is projected to increase by 12% over the next five years (from 2024/25 – most recent data). This represents an increase of approximately 12,000 students per annum.

This anticipated growth would bring London's full-time student population studying in London from 494,160 in 2024/25 to approximately 553,311 in the 2029/30 academic year, a net gain of 59,151 students over five years.

It should be noted that in conducting this analysis, Knight Frank Research where appropriate, excluded anomalous data points or modified trends which were strongly influenced by the pandemic. By doing this, we believe it gives a more accurate reflection of the trajectory of student numbers studying in London.

Figure 8: **Projection of full time students studying in London**



Source: Knight Frank Research, HESA

Table 9: **Summary of full time students studying in London projection**

Academic cycle	Undergraduates	Postgraduates	Full-time students	All Students
2018/19	231,348	89,952	321,300	386,238
2019/20	255,976	101,320	357,296	419,416
2020/21	285,100	117,615	402,715	471,044
2021/22	284,441	133,273	417,714	487,323
2022/23	317,432	149,542	466,974	524,593
2023/24	332,068	139,943	472,011	526,268
2024/25	352,467	141,693	494,160	548,328
2025/26 (projected)	359,241	146,087	505,328	558,503
2026/27 (projected)	366,183	150,633	516,816	569,038
2027/28 (projected)	373,298	155,338	528,635	579,942
2028/29 (projected)	380,590	160,207	540,796	591,225
2029/30 (projected)	388,065	165,246	553,311	602,898
Growth 2019/20 - 2024/25 (%)	37.7%	39.8%	38.3%	30.7%
# Growth 2019/20 - 2024/25	96,491	40,373	136,864	128,912
Projected 5 yr. growth (%)	10.1%	16.6%	12.0%	10.0%
# Projected 5 yr. growth (net)	35,598	23,553	59,151	54,570

Source: Knight Frank Research, HESA

3. PBSA Supply and development pipeline

3.1 Existing Purpose-Built Student Accommodation Supply

This section outlines the existing provision of student accommodation and the extent of the development pipeline across London as of Q3 2025, the local supply and pipeline was checked in February 2026 for this project.

University operated accommodation

- Across London, there are a total of 150 university operated PBSA schemes. These schemes collectively provide 39,860 bed spaces for students (41% of total bed spaces). University provided PBSA comprises 23,778 ensuite rooms (60%), 13,946 standard rooms with shared kitchen and bathroom facilities (35%), and 2,136 studios (5%).
- In Newham there are 3,427 PBSA beds across university operated schemes. The majority of these are ensembles with 2,134 beds (62.3%), with 1,102 (32.2%) being standard rooms with shared facilities and the remainder being studios (5.6%).
- Within a 1.5-mile radius of the site there are four university schemes, accounting for 2,267 beds. This is made up of 2,134 ensuite rooms, 91 studio rooms, and 42 standard rooms with shared kitchen and bathroom facilities.
- University operated schemes make up 63% of the bedspaces within 1.5-miles of the proposed scheme.

Table 10: Summary of all university operated PBSA (London, 1.5-mile catchment)

University	All London		Newham		1.5-mile radius	
Bed space type	# beds	%	# beds	%	# beds	%
Standard	13,946	35.0%	1,102	32.2%	42	1.9%
Ensuite	23,778	59.7%	2,134	62.3%	2,134	94.1%
Studio	2,136	5.4%	191	5.6%	91	4.0%
Total	39,860	100.0%	3,427	100.0%	2,267	100.0%

Source: Knight Frank Research, Q3 2025 data for all London

Privately operated accommodation

- There are 188 privately operated PBSA schemes across London, of which 50 are part-nominated and the remainder are operated on a direct-let basis. Collectively, these schemes provide 57,244 bed spaces for students and make up 59% of the total available beds in London. Privately operated PBSA in London is made up of 6,676 standard rooms (12%), 24,233 studio accommodation (42%) and 26,345 ensuite rooms (46%).
- Privately operated student accommodation in Newham provides 1,001 PBSA beds. These consist entirely of ensembles (934 – 93.3%) and studios (67 beds – 6.7%).
- Within a 1.5-mile radius of the site, there are a total of 1,331 PBSA beds in two privately operated scheme, comprising of 1,258 ensuite rooms, and 73 studio rooms.
- Privately operated schemes make up 37% of the bedspaces within 1.5-miles of the proposed scheme.

Table 11: Summary of all privately operated PBSA (London, 1.5-mile catchment)

Private	All London		Newham		1.5-mile radius	
Bed space type	# beds	%	# beds	%	# beds	%
Standard	13,946	35.0%	0	0.0%	42	1.9%
Ensuite	23,778	59.7%	934	93.3%	2,134	94.1%
Studio	2,136	5.4%	67	6.7%	91	4.0%
Total	39,860	100.0%	1,001	100.0%	2,267	100.0%

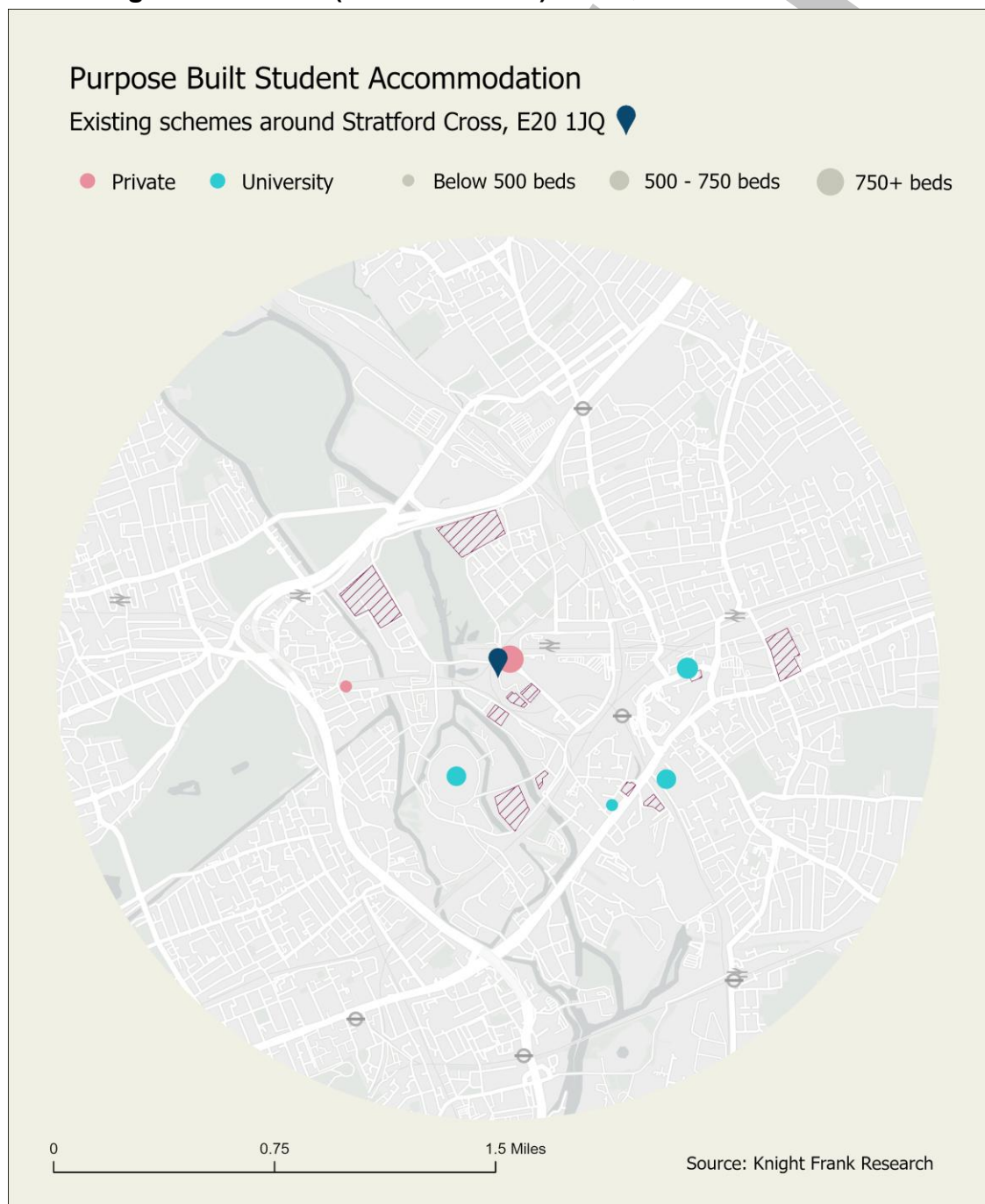
Source: Knight Frank Research, Q3 2025 data for all London

Table 12: **Total of all PBSA (London, 1.5-mile catchment)**

Bed space type	All London		Newham		1.5-mile radius	
	# beds	%	# beds	%	# beds	%
Standard	20,622	21.2%	1,102	24.9%	42	1.2%
Ensuite	50,123	51.6%	3,068	69.3%	3,392	94.3%
Studio	26,359	27.1%	258	5.8%	164	4.6%
Total	97,104	100.0%	4,428	100.0%	3,598	100.0%

Source: Knight Frank Research, Q3 2025 data for all London

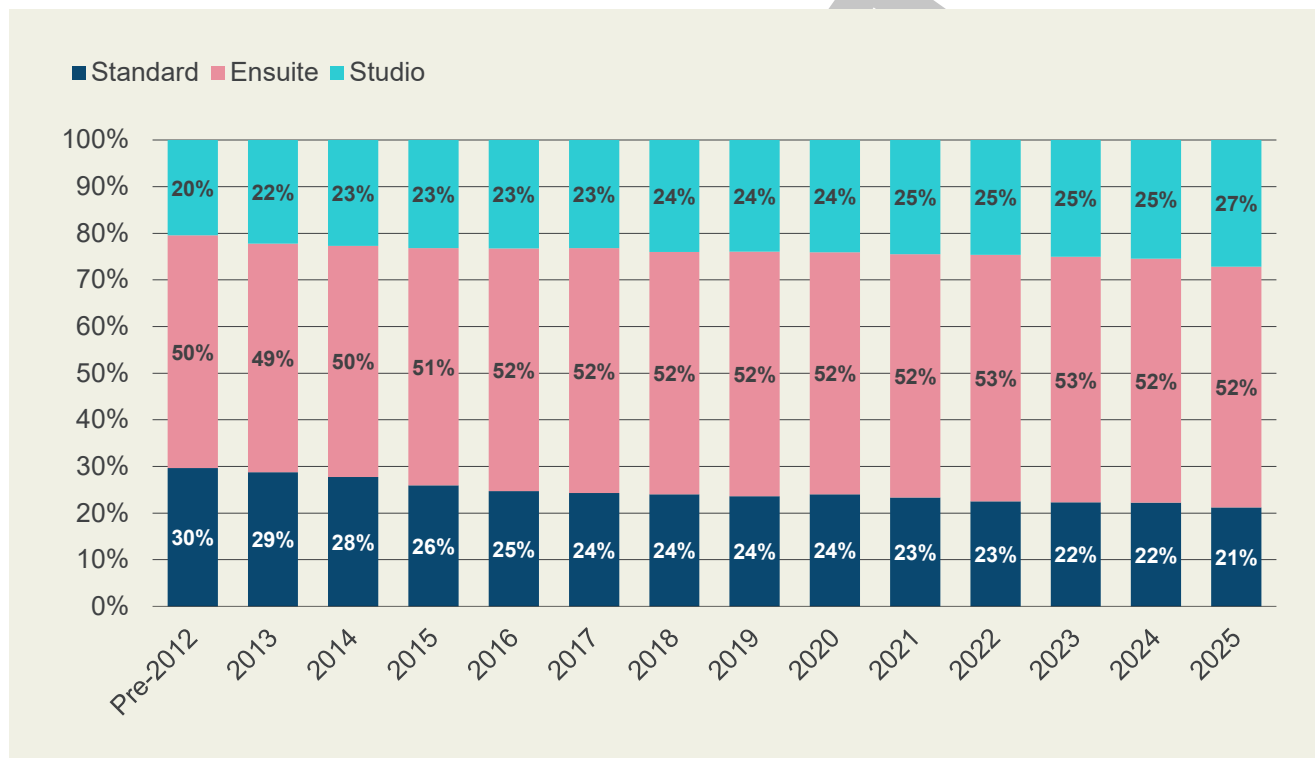
Figure 9: **Existing PBSA assets (1.5-mile radius)**



Changing composition

London has seen an increase in supply of 32,390 PBSA beds since 2013, or an increase of 50.1%. This equates to an average of 2,492 PBSA beds delivered per annum. As such, delivery of student beds has fallen short of the additional c.215,000 full-time students added to the student population since the 2013/14 academic year to the 2024/25 academic year. Between 2013 and 2025, ensuite accommodation has increased by 58%, studio accommodation by 84%, and standard rooms with shared kitchen and bathroom facilities 11%. The local area reflects this with just under 99% of PBSA beds being either ensuites or studios.

Figure 10: **London PBSA Supply, Pre-2012 to Q3 2025, by room type**



Source: Knight Frank Research, Q3 2025 data

3.2 Purpose-Built Student Accommodation Development Pipeline

The PBSA pipeline data across London in the following section has been compiled at the end of Q3 2025. The pipeline within the local 1.5 mile catchment and across Newham is up to date, as of February 2026.

Knight Frank's records suggest that there are 26 schemes in London that are under construction, upon completion these schemes would deliver 14,619 PBSA beds. There are a further 44 schemes totalling 21,450 PBSA beds with planning consented, but are not yet under construction. A further 38 schemes representing 18,734 PBSA beds have submitted planning applications but have not yet been approved. These figures would indicate that the total potential pipeline in London amounts to 54,803 PBSA beds.

According to our records, within a 1.5-mile radius of Stratford Cross, there are three PBSA schemes under construction in the development pipeline, which if completed, would provide an additional 2,065 PBSA beds. Seven schemes have planning consent, estimated to deliver 3,414 beds. One further scheme has planning submitted, which would deliver 692 beds.

Knight Frank data also shows 12 schemes in the Newham development pipeline, which if completed would provide an additional 6,517 PBSA beds. Of these, five schemes are under construction (delivering 2,896 beds), five have planning submitted (delivering 2,301 beds), and two have planning submitted (delivering 1,320 beds).

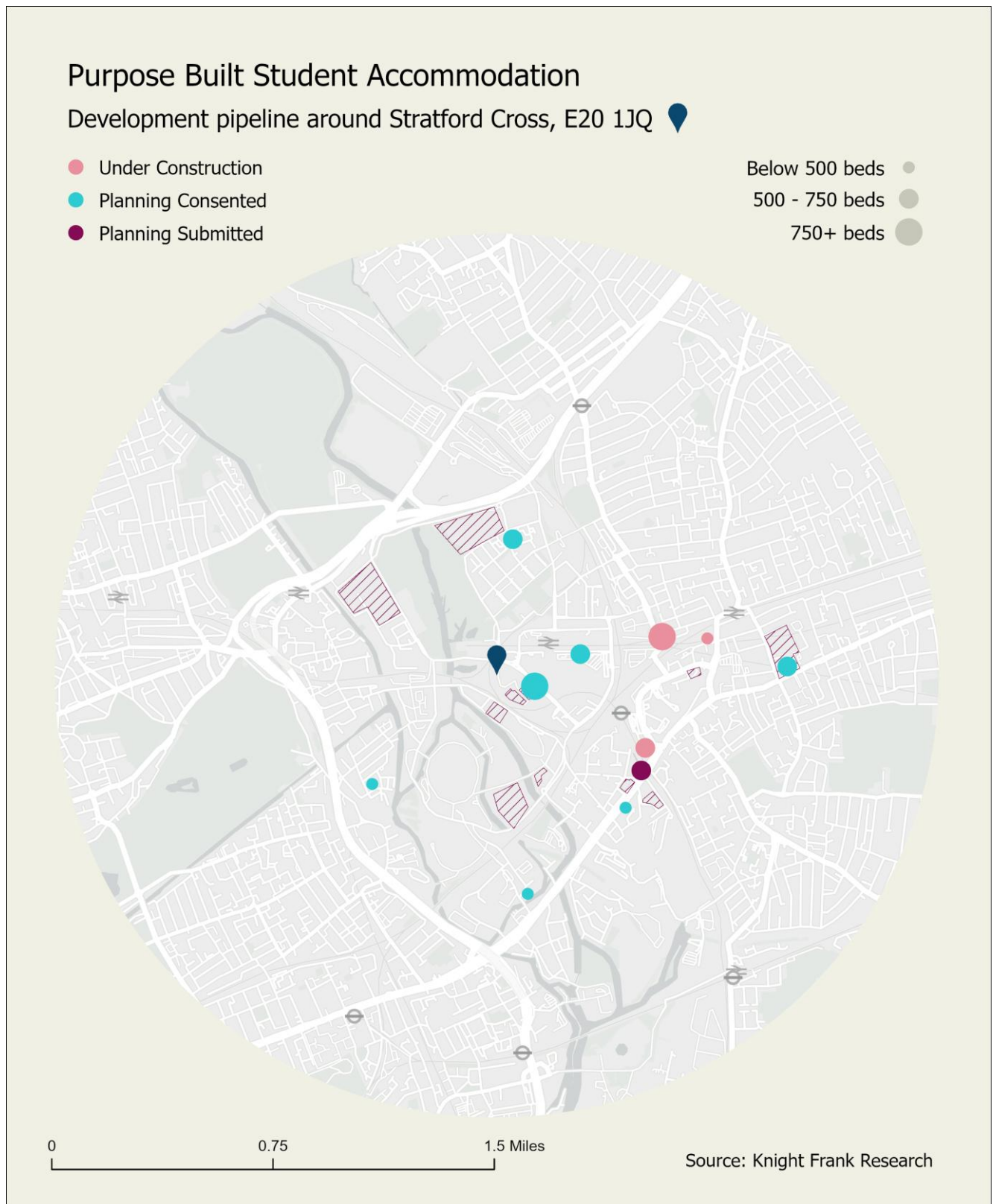
It should be noted that just because a scheme has submitted a planning application, or has had a planning application approved or even is under construction, there is no guarantee that these schemes will deliver any PBSA beds. Naturally, the further along the development process, the more likely a scheme is to complete – however this is not guaranteed.

Table 13: Summary of the PBSA development pipeline (London, 1.5-mile catchment, and Newham)

Planning Status	All London		Newham		1.5-mile radius	
	# beds	%	# beds	%	# beds	%
Planning Submitted	18,734	34.2%	1,320	20.3%	692	11.2%
Planning Consented	21,450	39.1%	2,301	35.3%	3,414	55.3%
Under Construction	14,619	26.7%	2,896	44.4%	2,065	33.5%
Total Pipeline	54,803	100.0%	6,517	100.0%	6,171	100.0%

Source: Knight Frank Research, Q3 2025 data

Figure 11: **PBSA Development pipeline within 1.5-miles**



4. PBSA Pricing Analysis

4.1 PBSA Pricing Trends

Knight Frank's Student Property Rental Index indicates that London's headline rental growth for PBSA was +3.1% for the 2025/26 academic year. Studio accommodation rental growth was -0.3%, with ensuite and non-ensuite rental growth of 4.5% and 5.5% respectively.

Table 14: **PBSA Rental Growth, London**

Annual Change	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
Non-en-suite	2.5%	1.3%	2.4%	5.9%	8.0%	6.8%	5.5%
En-suite	2.7%	2.3%	2.4%	6.1%	11.5%	9.6%	4.5%
Studio	2.4%	3.3%	3.1%	6.9%	11.9%	11.9%	-0.3%
Market	2.6%	2.6%	2.6%	6.5%	11.3%	10.3%	3.1%

Source: Knight Frank Research

For the remaining analysis in Section 4, all PBSA rents have been standardised to a 51-week term length (all rates are inclusive of bills). Data has been taken in February 2026.

In London, university operated rents for a non-ensuite with a shared bathroom are estimated to range from £260 per week through to £367 and between £289 and £440 for an ensuite room. Privately operated rents are estimated to range from £250 per week for standard non-ensuite accommodation through to £412 for a premium studio.

Table 15: **PBSA pricing in London, 51-week standardised tenancy, 2026/27**

	University operated				Privately operated				Total			
	LQ	Median	UQ	Average	LQ	Median	UQ	Average	LQ	Median	UQ	Average
Standard	£152	£244	£266	£220	£254	£274	£410	£323	£240	£267	£364	£298
Ensuite	£230	£271	£310	£268	£272	£316	£365	£323	£267	£310	£356	£316
Studio	£327	£394	£438	£389	£363	£437	£520	£454	£361	£435	£515	£452

Source: Knight Frank Research, Listings taken in February 2026 for self-catered tenancies over 250 days, part-nominated schemes are included in the privately operated data whilst fully nominated schemes are included in the university pricing.

Looking at listings of existing schemes within 1.5 miles of Stratford Cross, there are four schemes with pricing publicly available for the 2026/27 year, the median ensuite price on a 51-week standardised basis is £309 with studios at £482 (calculated using listings not accounting for number of beds).

Table 16: **PBSA pricing within 1.5 miles, 51-week standardised tenancy, 2026/27**

Median	Ensuite	Studio
Wick Park	£389	£645
Eleanor Rosa House	£311	£416
Hawthorne House*	£278	£461
Stratford One	£252	£501

Source: Knight Frank Research, *Opening for 2026/27 academic year. Listings taken in February 2026 for self-catered tenancies over 250 days, part-nominated schemes are included in the privately operated data whilst fully nominated schemes are included in the university pricing.

4.2 The HMO Market for Students and Pricing in the Private Rented

Private rented sector pricing – Rightmove wider PRS estimates

It should be noted that students in PBSA schemes benefit from all-inclusive rents which include their utility bills and wi-fi and increasingly, in many schemes, contents insurance is also included. However, this is not the case in PRS schemes where utilities are added on top of rent costs. Beyond all-inclusive rents, PBSA schemes offer a wide range of additional amenities that private rented sector properties cannot offer.

While PBSA is generally perceived as more expensive than living in a privately rented house share, the overall cost per annum is fixed and inclusive of all bills. Knight Frank's Student Accommodation Survey results indicate that students welcome the sense of financial security this provides, as they do not need to worry about defaulting on bill payments caused by rising energy costs. Accommodation in the private rented sector was rated as 'good' or 'excellent' value for money by 37% of students surveyed whilst 32% rated their PRS accommodation as 'poor' or 'awful' value for money. Whereas accommodation in Private PBSA was identified by 44% of students as 'good' or 'excellent' value for money. The gap in cost between the two modes of accommodation is closing. As a result, PBSA is beginning to be seen as a much more affordable and a good value-for-money option to students.

Private rented sector & Houses of Multiple Occupancy marketed towards students in the local area

- The private rented sector is expected to house students who require accommodation and do not have access to purpose-built schemes. Analysis of listings data within 1.5 miles of the scheme indicates that in 2025, 786 properties in the private rented sector were marketed towards students.
- There has been an increase in the number of PRS listings marketed at students in the local area, in 2024 there were 654 listings – a 20% increase.
- It is important to note that these are listings, rather than individual properties as estate agents may re-list the same property. However, assuming this behaviour is consistent it still points to an increase in housing stock being marketed towards students in the local area.
- Properties marketed towards students however are not always occupied by students, as shared houses are also popular with graduates and young professionals. Thus, students are often competing with the wider market for accommodation in privately rented sector properties.

Table 17: Median asking rents for PRS marketed at students (price per person, per week), 1.5 mile radius

Property size	2025 Median
Studio	£410
1 bedroom	£512
2 bedrooms	£317
3 bedrooms	£254
4 bedrooms	£238
5+ bedrooms	£185

Source: Knight Frank Research, Rightmove

5. Summary of Analysis & Concluding Statement

5.1 Student to Bed Space Ratios

In this section, city level analysis has been completed by looking at the number of students studying at in those cities including satellite campuses. The caveats outlined at the beginning of section 2.1 also apply.

An estimated 97,104 PBSA bed spaces have been identified across London, representing 20% of total full-time students studying in London. This equates to a gross ratio of 4 students per bed space.

Within a 1.5-mile radius of Stratford Cross, there are 3,598 PBSA bed spaces, representing 21.6% of full-time students living within the same catchment area. This equates to a gross ratio of 4.6 students per bed space.

Table 18: Summary of University cities by demand and current projected supply

University City	FT Students* (2024/25)	Existing PBSA Beds**	Estimated delivery by 2027	Ratio PBSA: FT Students	Ratio 2027 PBSA: FT Students
London***	479,252	97,104	11,488	4.9	4.4
Belfast	46,025	10,369	201	4.4	4.4
Birmingham	105,069	25,665	1,444	4.1	3.9
Glasgow	72,097	21,881	3,730	3.3	2.8
Manchester	94,673	29,279	594	3.2	3.2
Bristol	58,192	21,579	2,820	2.7	2.4
Edinburgh	58,518	22,984	2,572	2.5	2.3
Leeds	65,725	29,794	987	2.2	2.1
Newcastle	46,399	21,041	0	2.2	2.2
Liverpool	54,282	27,498	250	2.0	2.0
Canterbury	20,611	11,484	552	1.8	1.7
Nottingham	65,265	36,540	2,311	1.8	1.7
Cambridge	38,077	21,793	358	1.7	1.7
Sheffield	48,108	28,929	570	1.7	1.6
Coventry	41,490	25,279	825	1.6	1.6
UK	2,226,846	756,905	39,595	2.9	2.8

Source: Knight Frank Research, HESA, *this has been calculated by students' study location, **Supply and pipeline data are based on data from Q3 2025,

***London ex. Kingston

Students living in their parental or guardian home

Using data collected by HESA, Knight Frank estimates that of the students studying across London 20.8% live with parents or guardians and therefore do not require accommodation. This compares to an average of 19.5% across the UK.

Of the 16,649 full-time students living within a 1.5-mile radius of the site, 3,463 students (20.8%) are living at home with parents/guardians. Of the remaining 13,186 students, 9,588 (72.7%) do not have access to PBSA.

Table 19: Summary of student term-time accommodation across major markets

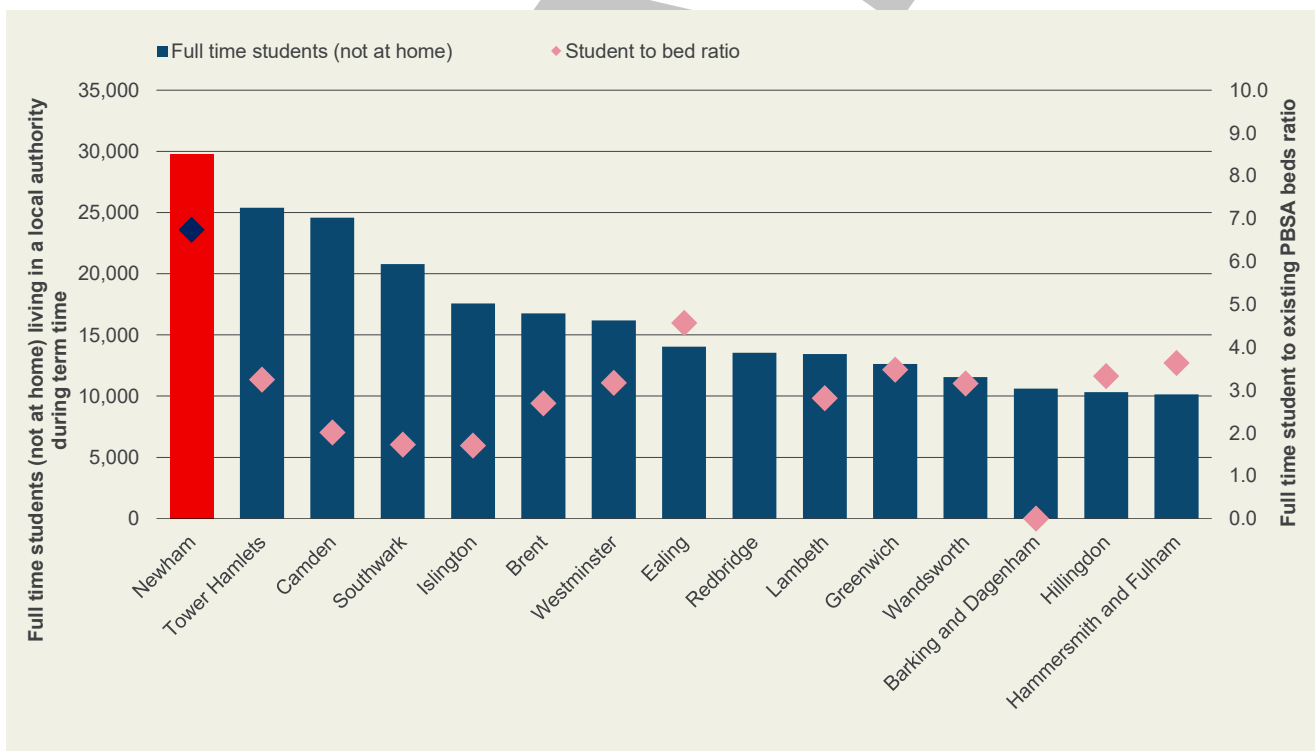
University City	FT students (2024/25)*	Existing PBSA bed spaces**	Estimated % of students in PBSA	Estimated % of students living with Parents/Guardians	Estimated % of students in PRS/HMOs
London***	479,252	97,104	20%	21%	59%
Bristol	58,192	21,579	37%	9%	54%
Manchester	94,673	29,279	31%	18%	51%
Birmingham	105,069	25,665	24%	27%	49%
Belfast	46,025	10,369	23%	31%	46%
Edinburgh	58,518	22,984	39%	15%	45%

Leeds	65,725	29,794	45%	14%	41%
Newcastle	46,399	21,041	45%	16%	39%
Glasgow	72,097	21,881	30%	35%	34%
Nottingham	65,265	36,540	56%	10%	34%
Liverpool	54,282	27,498	51%	18%	31%
Cambridge	38,077	21,793	57%	14%	29%
Sheffield	48,108	28,929	60%	15%	25%
Coventry	41,490	25,279	61%	14%	25%
Canterbury	20,611	11,484	56%	22%	23%
UK	2,226,846	756,905	34%	20%	46%

Source: Knight Frank Research, HESA, *this has been calculated by students' study location, **Supply and pipeline data are based on data from Q3 2025, ***London ex. Kingston

When comparing Newham to other local authorities across London, we see the impact that the recent rapid growth in student numbers has had on the area and the resulting student to bed ratio. Newham has the largest full time student population living there (not at home) during term time when compared to other London boroughs. It also has the second largest full time student (not at home) to bed ratio of 6.7 of any borough excluding Redbridge which is home to over 10,000 students during term time.

Figure 12: Full time students (not at home) to beds by local authority they live in during term time



Source: Knight Frank Research, HESA

5.2 Key Market Drivers

Based on the analysis the key demand and supply side factors for the student market relating to the proposed scheme as follows below.

Key demand side factors

- There are 16,649 full-time students living within a 1.5-mile catchment of the proposed scheme. Full-time domiciled students represent 50.1% of this, and their number has increased by 18.8% from 2020/2021 to 2024/25.
- Of the top five HEPs in terms of student numbers within 1.5-mile radius of Stratford Cross, collectively they hosted 137,204 full-time students in London in the 2024/25 academic year. Between 2019/20 and 2024/25, full-time students studying at these institutions in London have increased by 25.4%
- Full-time UK students represent 49.3% of full-time students at these institutions, and undergraduates accounted for 63.5% of the total full time student population.
- Using institution forecasts obtained by Lendlease, there are forecast to be over 30,000 students in 2030 at institutions deemed to be key drivers of demand for the scheme. Within 300m, there are forecast to be over 19,000 by 2030.

Key supply side factors

- Within 1.5-miles of Stratford Cross, there are 3,598 beds, of which 1,331 are privately operated, and 2,267 are university operated.
- According to HESA, of the 16,649 full-time students living within the 1.5-mile catchment area around the site, approximately 3,463 are living with their parents/guardians. If those students who live at home, and those who live in PBSA within the catchment area are removed, it means that approximately 9,588 full-time students living in the catchment area that are solely reliant on the private rental market for accommodation. Meaning that this stock is not available to families or adults in the PRS market.
- As of Knight Frank's latest assessment of the London pipeline in Q3 2025, there are 11 PBSA schemes providing 6,171 beds in the development pipeline within 1.5-mile of Stratford Cross.

Concluding Statement

After considerable bespoke analysis of the student housing market in London, Knight Frank Research confirms that the location of the proposed PBSA development located at Stratford Cross, E20 1JQ, is highly preferable as a location to live for students, in particular those studying at the University of the Arts London.

Currently only 20.3% of full-time higher education students across London have access to university or private sector PBSA, while a further 20.8% are estimated to be living at home with parents or guardians. The remaining 58.1% of full-time students in London are required to find accommodation within the private rented sector and HMOs and would otherwise be unable to access university or private sector purpose-built accommodation. As noted in detail throughout this study, full-time student numbers studying within the catchment area and wider London market are likely to record strong growth over the next upcoming academic cycles, based upon historic trends and demographic shifts.

The proposed scheme is well served by public transport, reaching a PTAL of 6b, with links to local and London-wide university campuses. When considering the immediate catchment of the proposed PBSA development at Stratford Cross, there are 16,649 full-time students living in the area, but currently only 3,598 PBSA beds. By 2029, Knight Frank's pipeline data marks 6,171 beds will be added, but this still leaves 7,015 students without access to PBSA within the 1.5-mile radius. It should be noted that this is using 2024/25 student numbers, and the figures may be even higher if more recent data were available. Knight Frank Research states the seriousness of the demand and supply imbalance and believes it is highly unlikely that supply will keep pace with demand within the local area, and the wider area of Newham. As a result of this imbalance, it is likely that students will continue to place more unwanted pressure on the local private rented market.

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Knight Frank
55 Baker Street, London, W1U 8AN



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Matt Eyre



21 Soho Square
London
W1D 3QP