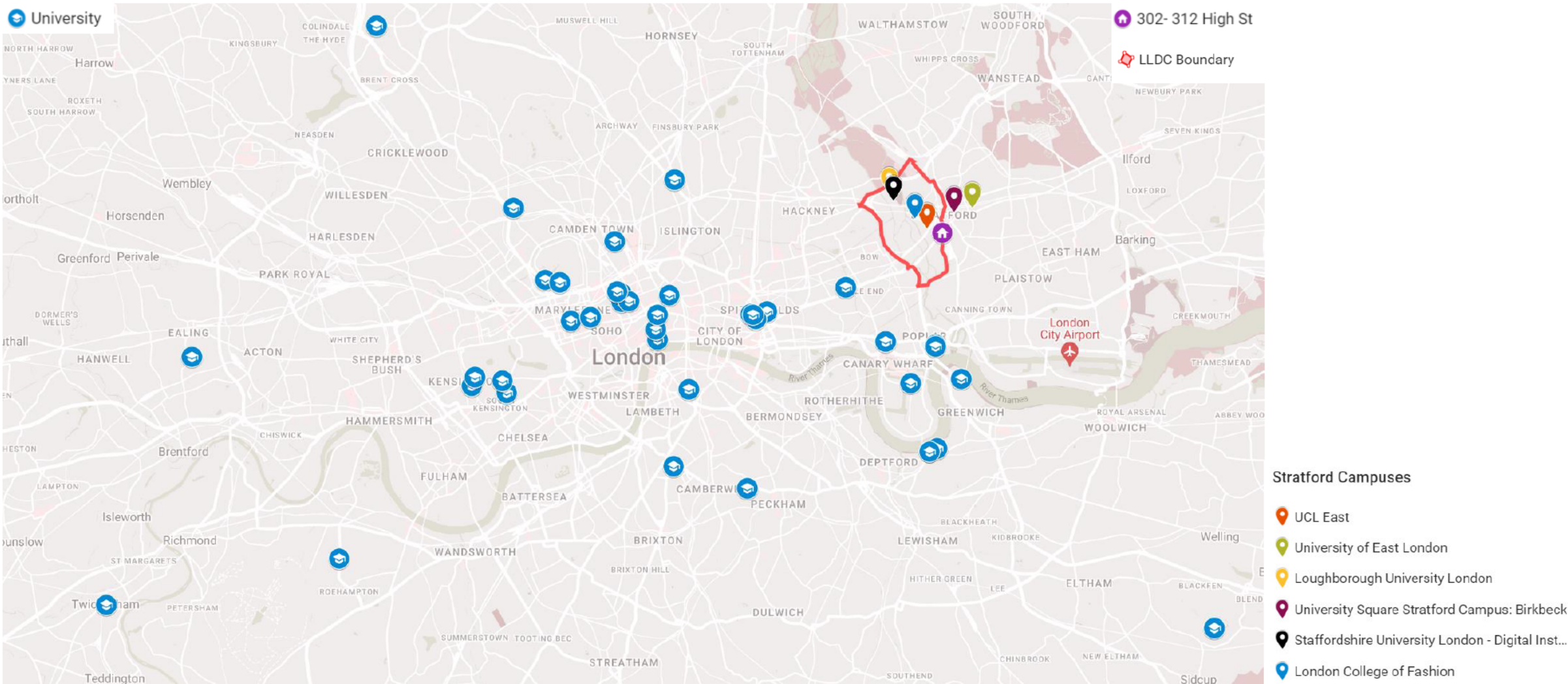


# SITE LOCATION, IN RELATION TO KEY UNIVERSITIES

## Site location



Source: Google Maps adapted by Cushman & Wakefield

# DEMAND LLDC & LONDON BOROUGH OF NEWHAM ANALYSIS





# DEMAND

## Stratford Higher Education Presence

This section explores demand trends for key institutions which are within an acceptable commuting time of at 302-312 High Street, Stratford, London, focusing on the Stratford area, as well as students within an acceptable commutable distance of the site.

Specific demand pool analysis – i.e. the number of students with a requirement for a bed – is examined in detail later in this assessment.

Following the London Olympic Games, the area in and around the Olympic Park has developed to become a true Higher Education hub in London, with new campuses such as UCL East adding to a critical mass of students in the area such as at the University of East London's Stratford Campus. The table below summarises emerging student numbers in the area.

Institutions in Area	Student Numbers
University of East London (Stratford)	8,585 (full-time)
Loughborough University (London Campus)	665 (full-time)
Staffordshire University (Digital Institute)	310 (full-time)
UCL East	3,600 (all modes)
University of the Arts, London College of Fashion	c. 3,500 (all modes)
TOTAL	15,975

Overall, there are currently almost 16,000 full-time students studying in and around the LLDC area, with this number set to grow as further development takes place at UCL East and the University of East London's Stratford Campus. Performance at specific institutions is examined overleaf.

## Commutable Institutions

In Cushman & Wakefield's experience, student's in London are typically happy to commute up to 45 minutes by public transport between their residence and place of study.

London is the UK's largest student market and one of the most popular global education destinations with 342,830 full-time and sandwich students studying at a Higher Education institution. Full-time student numbers in London have grown by a significant 38,095 students between 2012/13 and 2021/22.

Our analysis shows that the development site is located within a 45 minute commute of 26 London based higher education institutions, including internationally renowned universities such as; King's College London, LSE, UCL and Imperial College London. The site also benefits by being within in a commutable distance of 15 satellite campuses belonging to universities whose main campus is based outside of London. A full breakdown is available overleaf.

In the following section we have highlighted a selection of these institutions which we believe will be key sources of demand for the new accommodation development.

# DEMAND

## Commutable London Based Higher Education Institutions

Commutable Universities	Commutable Satellite Campuses
The Royal Central School of Speech and Drama	Buckinghamshire New University
University of the Arts, London	Coventry University
Ravensbourne University London	Glasgow Caledonian University
Royal Academy of Music	Loughborough University
Trinity Laban Conservatoire of Music and Dance	Newcastle University
The University of East London	Staffordshire University
The University of Greenwich	The University of Buckingham
The University of Westminster	The University of Sunderland
City, University of London	The University of the West of Scotland
Birkbeck College	Ulster University
Goldsmiths College	University of Bedfordshire
King's College London	University of Cumbria
London Business School	University of Northumbria at Newcastle
London School of Economics and Political Science	University of Wales Trinity Saint David
London School of Hygiene and Tropical Medicine	York St John University
Queen Mary University of London	
The Royal Veterinary College	
SOAS University of London	
University College London	
University of London (Institutes and activities)	
Conservatoire for Dance and Drama	
Courtauld Institute of Art	
London Metropolitan University	
Guildhall School of Music and Drama	
The University College of Osteopathy	
Royal Academy of Dramatic Art	

Source: Cushman & Wakefield



# DEMAND

## Key Commutable London Universities

### Key Commutable Institutions – overview

University	Travel Time via Public Transport	FT Student Population 2021/22	Growth 2016/17 to 2021/22	Number of International Students
University College London	12 minutes (walk)	39,940	30%	22,885
University of The Arts London	9 minutes (Walk)	21,840	67%	6,485
Birkbeck College, University of London	10 minutes (walk)	4,400	3%	1,000
University of East London	9 minutes	17,460	67%	6,485
Queen Mary University of London	20 minutes	24,030	37%	8,720
King's College London	35 minutes	34,040	41%	16,420
London School of Economics	35 minutes	12,495	16%	8,415

Source: HESA 2016/17 to 2021/22

As can be seen from the table, key institutions, including the supportive Queen Mary, University of London, and those with a strong presence in Stratford (UCL and University of the Arts) are amongst the fastest-growing commutable institutions. Importantly, all have a strong international student presence, with this cohort more likely to demand PBSA. Performance at key universities is examined overleaf.

# KEY SOURCES OF DEMAND

## Queen Mary, University of London

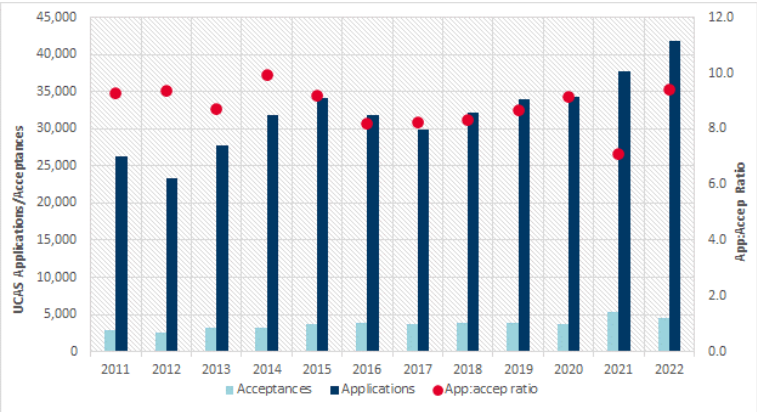
In the academic year 2021/22, Queen Mary University of London (QMUL) enrolled a total of 24,030 students (FT & SW) , reflecting a substantial 37% growth over the preceding five years. UK domiciled students accounted for 64% of the total student body, representing a 30% increase in the number of UK students since 2016/17, surpassing the UK comparator growth rate of 12%. Conversely, the number of EU students saw a decline of 5% during the same period, with 1,670 students studying at QMUL. Non-EU student numbers exhibited remarkable growth, totalling 7,050, marking an impressive 74% increase from 2016/17. Overall, Queen Mary University of London boasts a diverse student population, with non-UK students constituting 8,720, or 36% of the total, showcasing a substantial 50% growth rate from 2016/17.

Full-time student number growth 2016/17 to 2021/22

Domicile	2021/22			2016/17			QMUL	UK
FT &SW	Student numbers	%	UK Comparat or (%)	Student numbers	%	UK Comparat or (%)	Growth 2016/17 to 2021/22	Growth 2016/17 to 2021/22
UK	15,310	64%	72%	11,765	67%	78%	30%	12%
EU	1,670	7%	5%	1,765	10%	7%	-5%	-14%
Non EU	7,050	29%	23%	4,055	23%	16%	74%	78%
Total Non UK	8,720	36%	28%	5,820	33%	22%	50%	51%
Total	24,030	100%	100%	17,590	100%	100%	37%	21%

Source: HESA 2016-2021

Applications through UCAS 2011-2022



Source: UCAS 2011-2022

QMUL offers a wide range of undergraduate, postgraduate, and research programs in various fields, including arts and humanities, science and engineering, social sciences, medicine and dentistry, and business. The university is particularly known for its strengths in subjects such as law, medicine, life sciences, and humanities.

In 2022, the university received a total of 41,820 applications, with an application to acceptance ratio of 9.7:1, far above the UK average of 6.5:1. Applications have grown by 40% over the past 5 years, while acceptance have grown by 23%. This is indicative of a university seeking to maintain the standard of its intake.

# KEY SOURCES OF DEMAND

## University College London

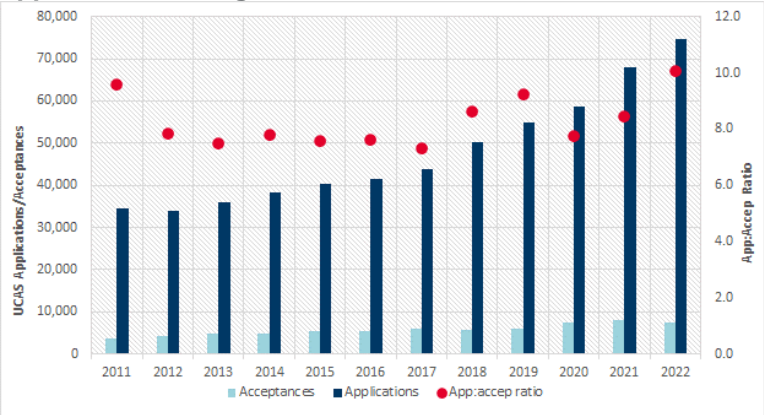
UCL (University College London) boasts a prominent global standing, and this is evidently reflected in its student demographics. In the academic year 2021/22, non-UK students accounted for 57% of the student population, well above the 28% national average. UCL has seen remarkable growth in its international student body over the past five years, experiencing a remarkable 60% surge in enrolment. The recruitment of non-EU students has been a significant driver behind this growth, with the number of non-EU students more than doubling in size since 2016/17 (an additional 8,645 students). Meanwhile, EU student numbers have remained relatively stable, with a slight decrease of 1%. UK domiciled students have also grown, but at a more modest rate, demonstrating a 4% increase since 2016/17 from an already substantial base.

Full-time student number growth 2016/17 to 2021/22

Domicile	2021/22			2016/17			UCL	UK
FT &SW	Student numbers	%	UK Comparat or (%)	Student numbers	%	UK Comparat or (%)	Growth 2016/17 to 2021/22	Growth 2016/17 to 2021/22
UK	17,055	43%	72%	16,375	53%	78%	4%	12%
EU	4,060	10%	5%	4,085	13%	7%	-1%	-14%
Non EU	18,825	47%	23%	10,180	33%	16%	85%	78%
Total Non UK	22,885	57%	28%	14,265	47%	22%	60%	51%
Total	39,940	100%	100%	30,640	100%	100%	30%	21%

Source: HESA 2016-2021

Applications through UCAS 2011-2022



Source: UCAS 2011-2022



# KEY SOURCES OF DEMAND

## University of The Arts, London

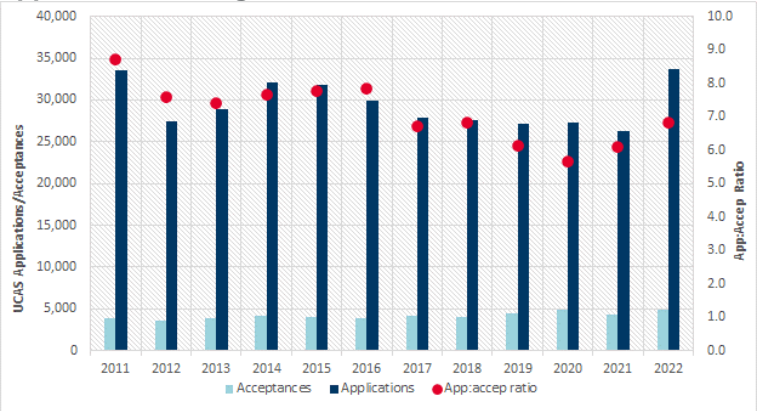
In 2021/22, the University of the Arts London (UAL) had a total of 21,840 students (FT & SW). Over the past five years, UAL witnessed a 26% increase in student numbers, outpacing the UK comparator rate of 21%. UK domiciled students constituted 45% of the total student body, with a 10% growth from 2016/17. Conversely, EU student numbers grew at a slower rate of 2%, totalling 2,315 students, while the non-EU student cohort exhibited remarkable growth, reaching 9,645 students and representing a significant 58% increase, over a five year period. Consequently, the total non-UK student population at UAL accounted for 55%, showcasing a growth rate of 43% from 2016/17.

### Full-time student number growth 2016/17 to 2021/22

Domicile	2021/22			2016/17			Uni of Arts	UK
FT & SW	Student numbers	%	UK Comparat or (%)	Student numbers	%	UK Comparat or (%)	Growth 2016/17 to 2021/22	Growth 2016/17 to 2021/22
UK	9,880	45%	72%	8,955	52%	78%	10%	12%
EU	2,315	11%	5%	2,265	13%	7%	2%	-14%
Non EU	9,645	44%	23%	6,120	35%	16%	58%	78%
Total Non UK	11,960	55%	28%	8,385	48%	22%	43%	51%
Total	21,840	100%	100%	17,340	100%	100%	26%	21%

Source: HESA 2016-2021

### Applications through UCAS 2011-2022



Source: UCAS 2011-2022

UAL is a leading university for art, design, fashion, communication, and the performing arts. The University consists of 6 colleges, one of which, London Fashion College is located within a 9-minute walk of the proposed development. In 2022 UAL received a total of 33,735 applications, a figure which has grown by 21% since 2017. In line with this acceptance have also grown by 19% over the same period.

# KEY SOURCES OF DEMAND

## Birkbeck, University of London

In the academic year 2021/22, Birkbeck College, University of London, hosted a full-time student population of 4,400, reflecting substantial growth of 22% over the past five years. International student represent almost a quarter of the student body (23%), having grown by 22% over the past five years (an additional 180 students). UK student numbers have fallen marginally, by 2%, although this is from a much larger base.

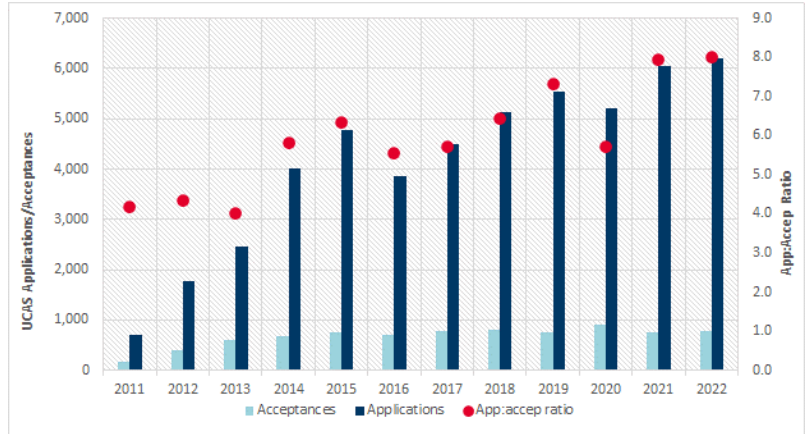
Full-time student number growth 2016/17 to 2021/22

Domicile	2021/22			2016/17			Birkbeck	UK
FT &SW	Student numbers	%	UK Comparat or (%)	Student numbers	%	UK Comparat or (%)	Growth 2016/17 to 2021/22	Growth 2016/17 to 2021/22
UK	3,400	77%	72%	3,465	81%	78%	-2%	12%
EU	300	7%	5%	320	7%	7%	-6%	-14%
Non EU	700	16%	23%	500	12%	16%	40%	78%
Total Non UK	1,000	23%	28%	820	19%	22%	22%	51%
Total	4,400	100%	100%	4,285	100%	100%	3%	21%

Source: HESA 2015-2020

Source: HESA 2016-2021

## Applications through UCAS 2011-2022



Birkbeck, University of London, is well-known for its high-quality courses in arts and humanities, social sciences, business and management, science and STEM fields, law, psychology, and economics. In 2022, the university received 6,195 applications to study, a figure which has grown by 19% over the past 2 years.

# KEY SOURCES OF DEMAND

## University of East London

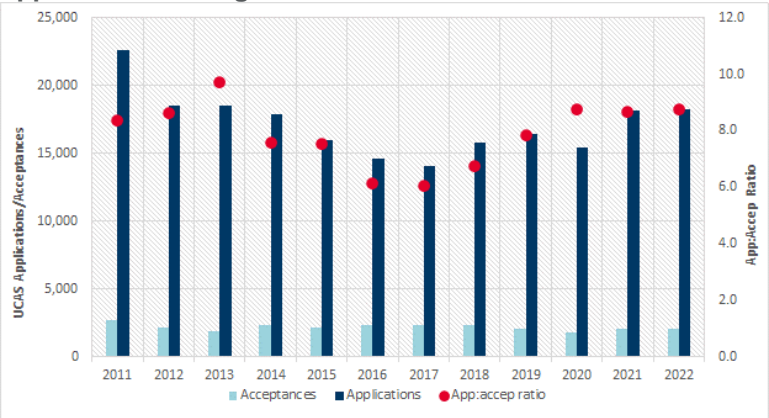
In the academic year 2021/22, the University of East London (UEL) enrolled a total of 17,460 students (FT & SW), marking a notable 67% increase over the past five years. UK domiciled students represent 63% of the total student body, the number of UK students has grown by 15% since 2016/17 . In contrast, the number of EU students experienced a 14% decline during the same period, with a total of 300 students now studying at UEL. Non-EU student numbers witnessed remarkable growth, with 6,185 students, representing a 1089% increase from 2016/17, outpacing the UK comparator rate of 78% growth. Overall, the University of East London boasts a diverse student population, with non-UK students constituting 37% of the total, exhibiting a 645% growth rate from 2016/17 and surpassing the UK comparator rate of 51%.

Full-time student number growth 2016/17 to 2021/22

Domicile	2021/22			2016/17			East London	UK
FT &SW	Student numbers	%	UK Comparat or (%)	Student numbers	%	UK Comparat or (%)	Growth 2016/17 to 2021/22	Growth 2016/17 to 2021/22
UK	10,980	63%	72%	9,570	92%	78%	15%	12%
EU	300	2%	5%	350	3%	7%	-14%	-14%
Non EU	6,185	35%	23%	520	5%	16%	1089%	78%
Total Non UK	6,485	37%	28%	870	8%	22%	645%	51%
Total	17,460	100%	100%	10,440	100%	100%	67%	21%

Source: HESA 2016-2021

Applications through UCAS 2011-2022



Source: UCAS 2011-2022

UEL offers a wide range of undergraduate, postgraduate, and research programs across various disciplines. These include fields such as arts, business, health, education, engineering, science, social sciences, and more.. In 2022, the university received a total of 18,230 applications, with an application to acceptance ratio of 8.7:1, far above the UK average of 6.5:1. The University also recruits a significant proportion of students through clearing (46% in 2022 Cycle),



# KEY SOURCES OF DEMAND

## King's College London

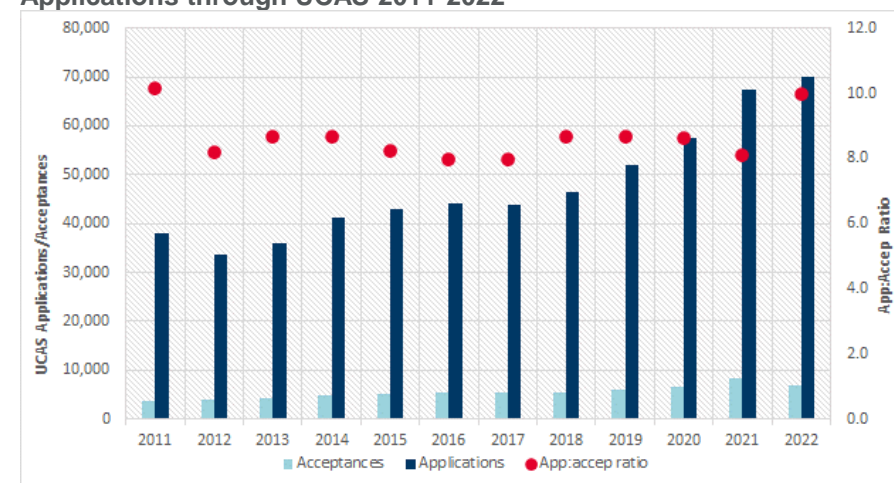
King's College London has global reputation, and this is reflected in the makeup of its student body. In 2021/22 non-UK students represented 39% of the student body, far above the 22% average observed nationally. The University has grown its international student cohort by a significant 77% over the past 5 years, this has been driven by the recruitment of non-EU students – a cohort which has more than doubled in size since 2015 (from 7,005 additional students). EU student numbers have increased by 195 students over the same period. UK domiciled students have also increased, albeit at a slower rate but from a larger base.

### Full-time student number growth 2016/17 to 2021/22

Domicile	2021/22			2016/17			King's	UK
FT & SW	Student numbers	%	UK Comparat or (%)	Student numbers	%	UK Comparat or (%)	Growth 2016/17 to 2021/22	Growth 2016/17 to 2021/22
UK	17,625	52%	72%	14,805	61%	78%	19%	12%
EU	3,595	11%	5%	3,400	14%	7%	6%	-14%
Non EU	12,825	38%	23%	5,890	24%	16%	118%	78%
<b>Total Non UK</b>	<b>16,420</b>	<b>48%</b>	<b>28%</b>	<b>9,290</b>	<b>39%</b>	<b>22%</b>	<b>77%</b>	<b>51%</b>
<b>Total</b>	<b>34,040</b>	<b>100%</b>	<b>100%</b>	<b>24,095</b>	<b>100%</b>	<b>100%</b>	<b>41%</b>	<b>21%</b>

Source: HESA 2016-2021

### Applications through UCAS 2011-2022



Source: UCAS 2011-2022

King's College has added a string of new degrees to its offering, in areas such as History and Political Economy, creative, media and cultural industries, as well as dental therapy and hygiene. A new Department of Engineering opened in 2019, bringing with it an new undergraduate degree in General Engineering for 2020. These new degrees have increased the institution's popularity, with application numbers growing by 22% over the past 2 years, while acceptances have grown by 5%, indicative of a university seeking to maintain the quality of its intake.

# KEY SOURCES OF DEMAND

## London School of Economics

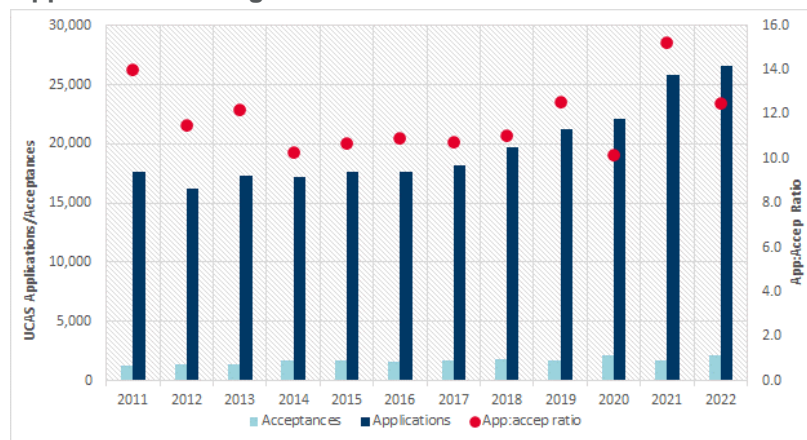
In 2021/22 London School of Economics had a full-time student population of 12,495, having grown by 16% over the past five years. Growth has been observed in students from all domiciles, with the exception of EU students following Brexit. International students represent over two thirds of the student body (67%), significantly above the nationally observed average of just 28%, reflecting the excellent international reputation of the university.

### Full-time student number growth 2016/17 to 2021/22

Domicile	2021/22			2016/17			LSE	UK
FT & SW	Student numbers	%	UK Comparat or (%)	Student numbers	%	UK Comparat or (%)	Growth 2016/17 to 2021/22	Growth 2016/17 to 2021/22
UK	4,075	33%	72%	3,325	31%	78%	23%	12%
EU	1,905	15%	5%	1,925	18%	7%	-1%	-14%
Non EU	6,510	52%	23%	5,475	51%	16%	19%	78%
<i>Total Non UK</i>	<i>8,415</i>	<i>67%</i>	<i>28%</i>	<i>7,400</i>	<i>69%</i>	<i>22%</i>	<i>14%</i>	<i>51%</i>
<b>Total</b>	<b>12,495</b>	<b>100%</b>	<b>100%</b>	<b>10,730</b>	<b>100%</b>	<b>100%</b>	<b>16%</b>	<b>21%</b>

Source: HESA 2016-2021

### Applications through UCAS 2011-2022



Source: UCAS 2011-2022

Applications to study at LSE have grown by 20% over the past two years and 46% over the past 5 years. The University received a total of 26,625 applications in 2022. LSE offers a wide range of undergraduate, postgraduate, and doctoral programs in various fields, including economics, sociology, law, politics, international relations, anthropology, philosophy, and more. It is particularly renowned for its programs in economics and related disciplines. The university is known for its rigorous academic standards and emphasis on research-led teaching.



# UNIVERSITIES INVESTMENT & PERFORMANCE





# LEAGUE TABLE PERFORMANCE

## Queen Mary, University of London

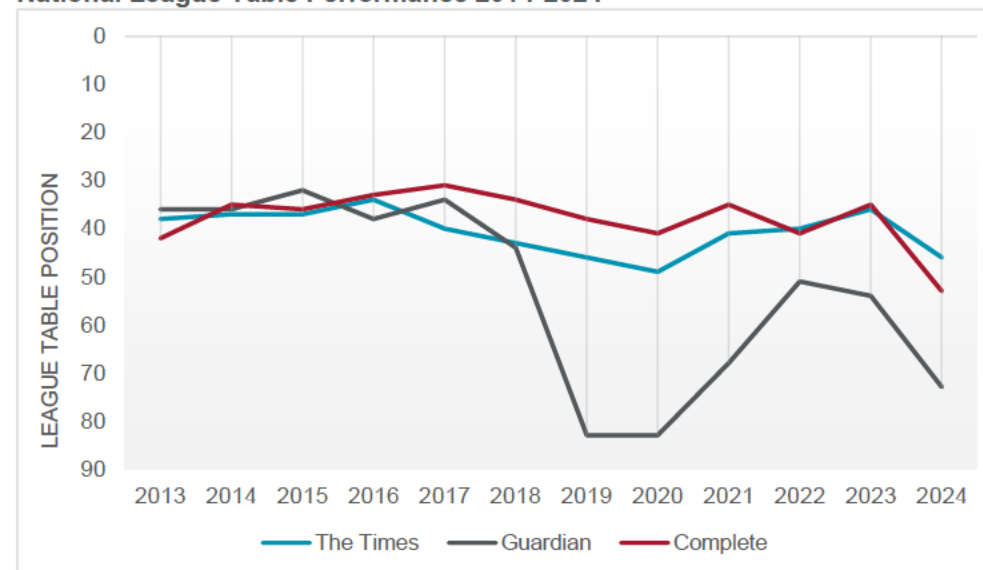
In 2024, Queen Mary, University of London has been ranked in 46<sup>th</sup> place by The Times, 73<sup>rd</sup> place by The Guardian and 53<sup>rd</sup> place by The Complete University Guide.

Queen Mary University of London (QMUL) is a highly prestigious institution known for its outstanding academic achievements. In the Research Excellence Framework (REF) for 2021, QMUL secured an impressive 19<sup>th</sup> place, indicating its commitment to cutting-edge research and innovation. This follows a strong showing in the 2014 REF, where it ranked 11<sup>th</sup> and the 2008 RAE, where it ranked 13<sup>th</sup>.

QMUL's commitment to providing a high-quality educational experience is further demonstrated through its Silver rating in the 2023 Teaching Excellence Framework (TEF). This is a significant achievement, especially in comparison to the Silver rating in the 2017 TEF, highlighting the university's consistent dedication to excellence in teaching and learning.

In global rankings, QMUL maintains its reputation, with a position in the 125<sup>th</sup> range in the 2023 QS World Rankings and the 124<sup>th</sup> range in the Times World Rankings for the same year. This underscores QMUL's status as a world-class institution that excels in both research and education. With a strong history of academic excellence and a focus on enhancing the student experience, Queen Mary University of London continues to be a top choice for those seeking a first-rate education and a globally competitive research environment.

National League Table Performance 2014-2024



Source: The Guardian, The Complete University Guide, The Times 2014-2024

# LEAGUE TABLE PERFORMANCE

## University College London

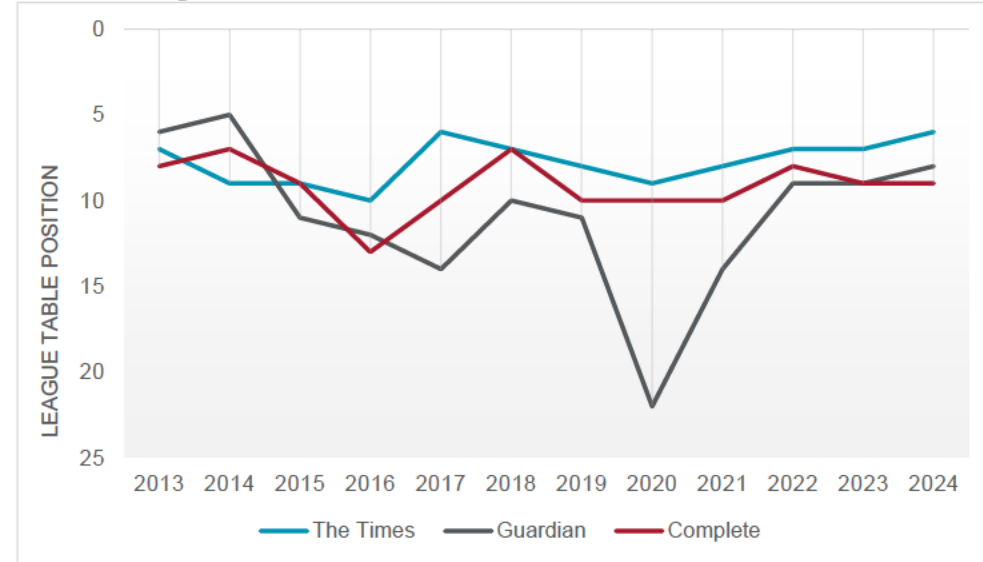
In 2024, UCL has been ranked in 6<sup>th</sup> place by The Times, 8<sup>th</sup> place by The Guardian and 9<sup>th</sup> place by The Complete University Guide.

University College London (UCL), a prestigious and venerable institution, consistently achieves remarkable rankings in various assessments and international standings. In the recent REF (Research Excellence Framework) evaluation of 2021, UCL proudly secured the 6<sup>th</sup> position, reflecting its continuous commitment to ground-breaking research. This accomplishment is in line with its impressive 8<sup>th</sup> rank in the 2014 REF assessment and the 7<sup>th</sup> place in the RAE (Research Assessment Exercise) of 2008, underscoring its consistent research excellence.

UCL also excels in teaching quality, earning a Gold rating in the 2018 Teaching Excellence Framework (TEF) and a Silver rating in the 2017 TEF, indicating its dedication to delivering high-quality education.

Globally, UCL maintains a strong presence, with a QS World Ranking of 8 and a Times World Ranking of 22<sup>nd</sup> in 2023, firmly establishing it as a world-renowned institution for both research and education.

National League Table Performance 2014-2024



Source: The Guardian, The Complete University Guide, The Times 2014-2024

# LEAGUE TABLE PERFORMANCE

## University of The Arts, London

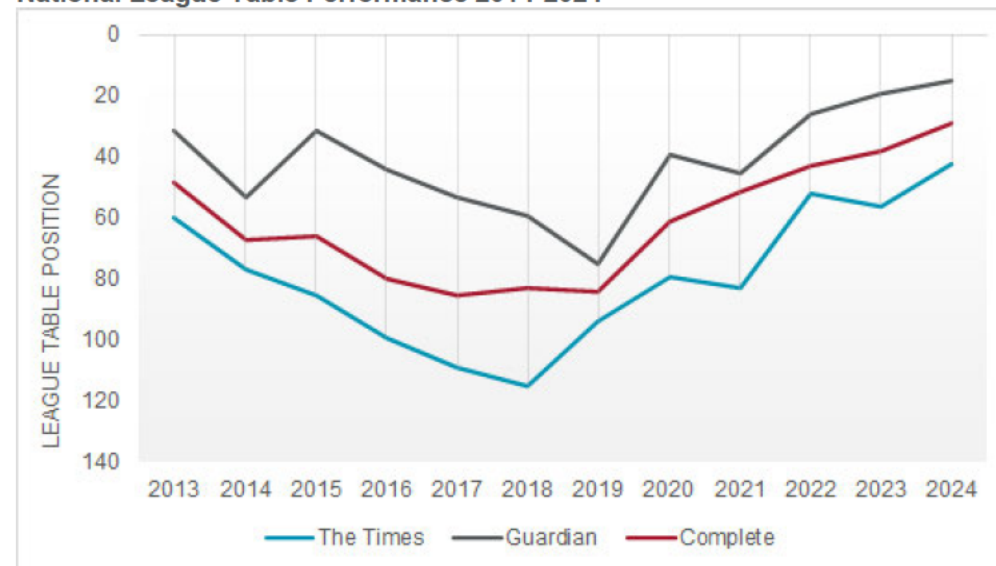
In 2024, University of The Arts London has been ranked at a high of 15<sup>th</sup> place by The Guardian, followed by 29<sup>h</sup> place in The Complete University Guide and 42<sup>nd</sup> place by The Times.

The University of the Arts London is a renowned institution known for its vibrant and dynamic creative community, offering a diverse range of programs in art, design, fashion, communication, and performing arts.

UAL) has consistently demonstrated excellence in research and education, as evidenced by its impressive Research Excellence Framework (REF) 2014 rating of 4\*, affirming the institution's commitment to producing world-leading research in the arts and creative disciplines.

UAL's dedication to maintaining high standards in teaching and learning is reflected in its Silver rating in the Teaching Excellence Framework (TEF) 2017. UAL continues to be a leading force in the world of arts education.

National League Table Performance 2014-2024



Source: The Guardian, The Complete University Guide, The Times 2014-2024



# LEAGUE TABLE PERFORMANCE

## University of East London

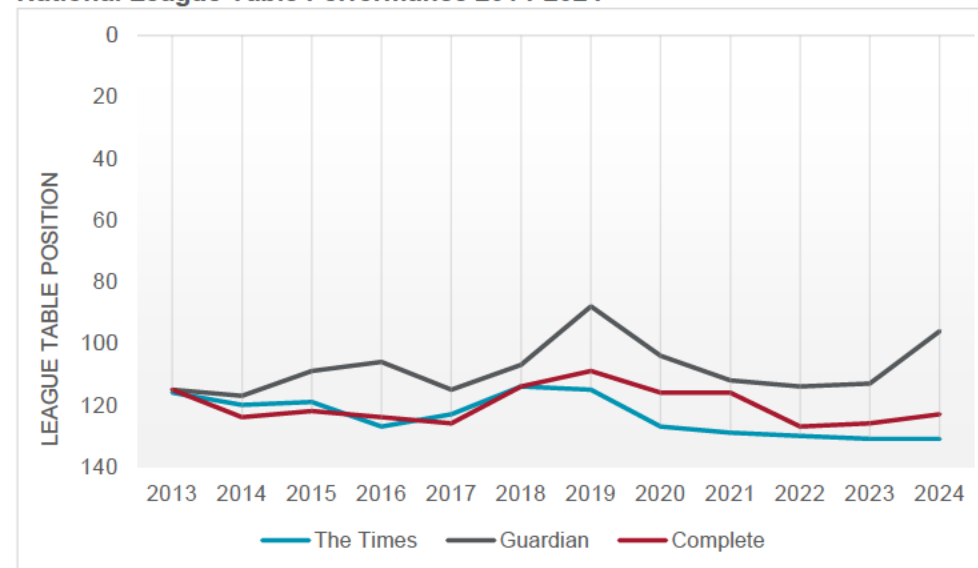
In 2024, UEL has been ranked in 96<sup>th</sup> place by The Guardian, 123<sup>rd</sup> place by The Complete University Guide and 131<sup>st</sup> place by the Times.

The University of East London has made significant strides in recent years, as evident from its performance in various national and international rankings. In the latest Teaching Excellence Framework (TEF) assessment in 2023, UEL received a Silver rating, a testament to the institution's dedication to providing high-quality education. UEL has consistently improved its standing, as seen in the contrast with the 2017 TEF rating of Bronze, showcasing a commitment to enhancing the student experience.

Moreover, in the prestigious QS World Rankings for 2023, UEL secured a position in the 801-1000 range, reflecting its growing reputation on the global stage.

This academic institution has clearly made significant advancements in research and education, making it an attractive choice for students seeking a well-rounded and forward-looking university experience.

National League Table Performance 2014-2024



Source: The Guardian, The Complete University Guide, The Times 2014-2024

# LEAGUE TABLE PERFORMANCE

## King's College London

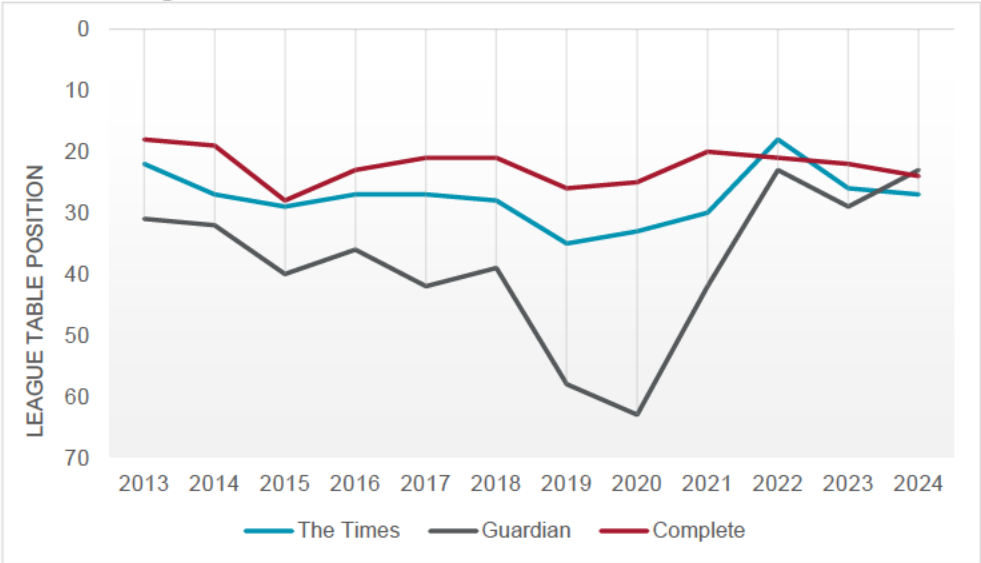
In 2024, King's College London has been ranked in 27<sup>th</sup> place by The Times, 23<sup>rd</sup> place by The Guardian and 24<sup>th</sup> place by The Complete University Guide.

King's College London, a distinguished institution with a rich academic heritage, consistently attains commendable rankings in various assessments and global rankings. In the recent REF (Research Excellence Framework) assessment of 2021, it secured a notable 9<sup>th</sup> rank, demonstrating its substantial contribution to cutting-edge research, and it had similarly impressive results in 2014 when it ranked 7<sup>th</sup>. Its commitment to research excellence was evident back in 2008 as well when it achieved the 22<sup>nd</sup> position in the RAE (Research Assessment Exercise).

In terms of teaching quality, the university earned a Silver rating in the 2017 Teaching Excellence Framework (TEF), reflecting its dedication to high-quality education.

Globally, King's College London stands strong, with a QS World Ranking of 37<sup>th</sup> and a Times World Ranking of 35<sup>th</sup> in 2023, solidifying its reputation as a world-class institution for both research and education.

National League Table Performance 2014-2024



Source: The Guardian, The Complete University Guide, The Times 2014-2024

# LEAGUE TABLE PERFORMANCE

## London School of Economics

In 2024, UCL has been ranked in 4<sup>th</sup> place by The Times, 4<sup>th</sup> place by The Guardian and 3<sup>rd</sup> place by The Complete University Guide.

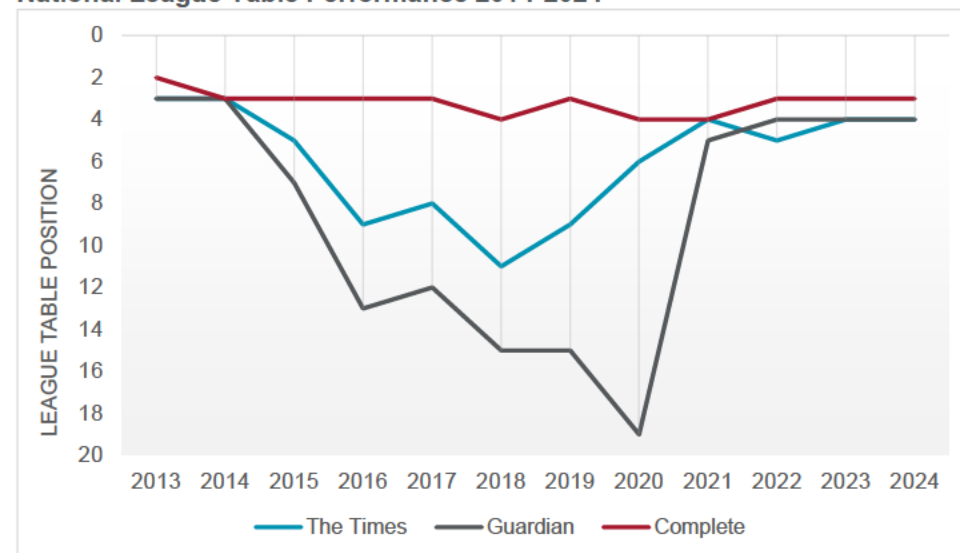
The London School of Economics (LSE), renowned for its exceptional academic contributions, consistently achieves top-tier rankings in various assessments and international rankings.

In the most recent REF (Research Excellence Framework) evaluation in 2021, LSE secured an impressive 4<sup>th</sup> place, reaffirming its dedication to ground-breaking research. This achievement follows its remarkable 3<sup>rd</sup> rank in the 2014 REF assessment and the 4<sup>th</sup> position in the RAE (Research Assessment Exercise) of 2008, highlighting its unwavering commitment to research excellence.

LSE earned a Bronze rating in the 2017 TEF, reflecting its focus on providing quality education.

Globally, the London School of Economics maintains its strong standing with a QS World Ranking of 56<sup>th</sup> and a Times World Ranking of 37<sup>th</sup> in 2023, solidifying its reputation as a leading institution for research and education.

National League Table Performance 2014-2024



Source: The Guardian, The Complete University Guide, The Times 2014-2024

# SUPPLY STUDENT ACCOMMODATION IN LLDC PLANNING AREA & LONDON BOROUGH OF NEWHAM





# SUPPLY OVERVIEW

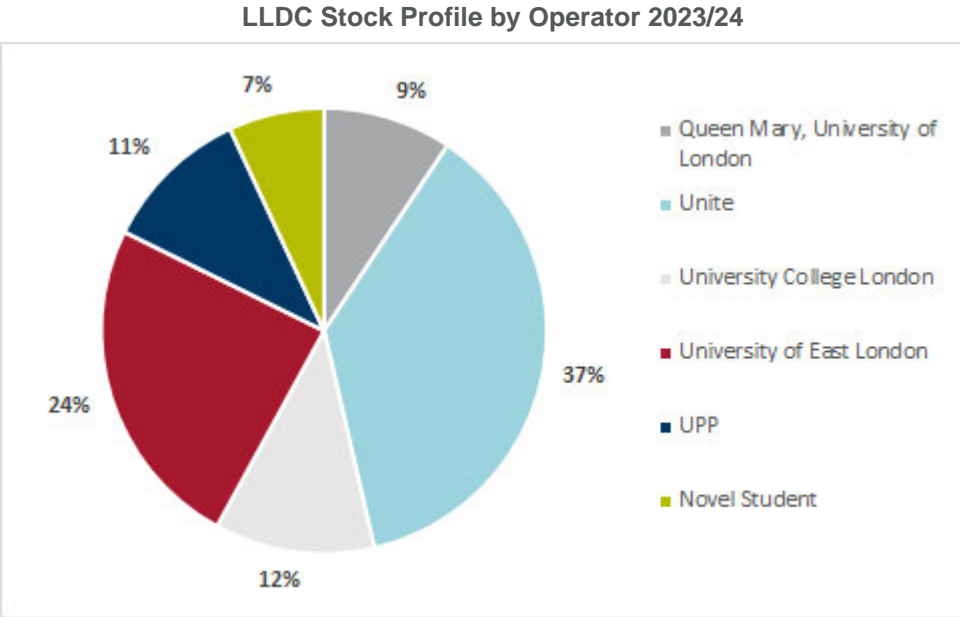
In 2023, there are a total of 4,755 purpose-built student accommodation bed spaces operating in the combined area of the London Legacy Development Corporation's (LLDC) Planning Area and the adjacent London Borough of Newham, where the proposed development is located.

As can be seen from the chart, Unite and Novel Student are the only private sector operators in the LLDC and adjacent London Borough of Newham, where the proposed development is located, for 2023/24, controlling just under half (44%) of all supply. Unite's Angel Lane scheme (London Borough of Newham) is currently nominated by King's College London and Stratford One is currently nominated by The University of The Arts, London. Novel Student's Wick Park is also nominated, in part, by The University of the Arts, London, with the remaining bed spaces offered on a direct-let basis. University provided beds account for the remainder of the market, providing 60% split across the Queen Mary, University of London, University College London, The University of East London and UPP.

Whilst the University of East London offers over 1,100 beds on-campus at its East and West Student Villages, these beds are not located in Stratford and have been excluded from calculations throughout this report.

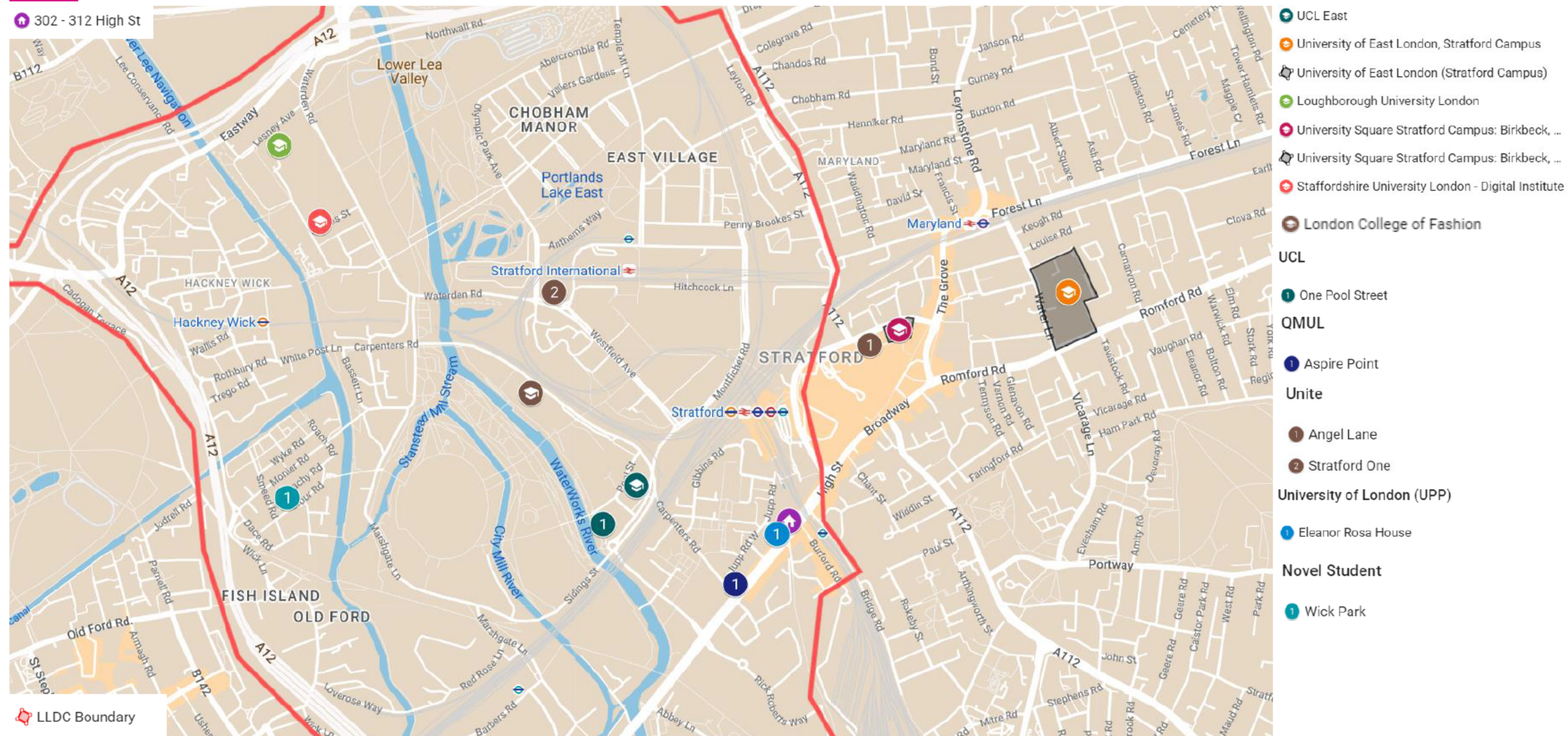
The most recent scheme to open in the LLDC planning area was Novel Student's Wick Park, in 2023. The scheme is of a premium quality and consists of 330 bed spaces in a mix of en-suite clusters and studios.

Stock location is examined overleaf.



Source: Cushman & Wakefield Student Accommodation Tracker 2023/24

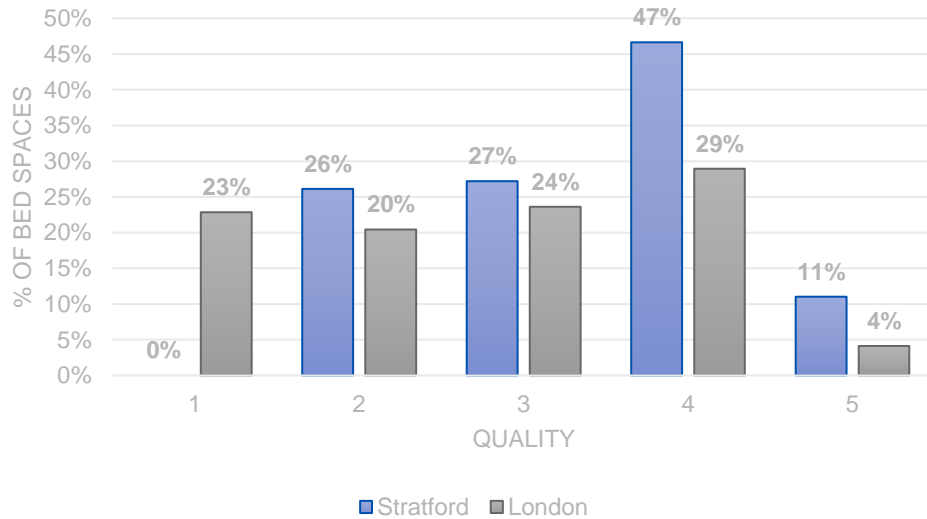
# LLDC & NEWHAM, LOCATION OF STOCK



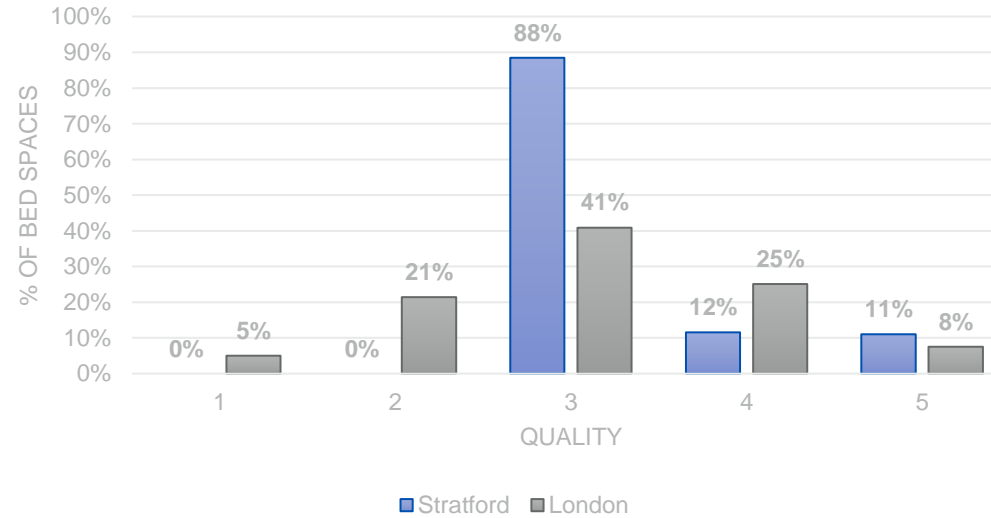
Source: Cushman & Wakefield Student Accommodation Tracker 2023/24

# QUALITY ANALYSIS

Room Quality, LLDC & Newham vs. London



Facilities/ Amenity Quality, LLDC & Newham vs. London



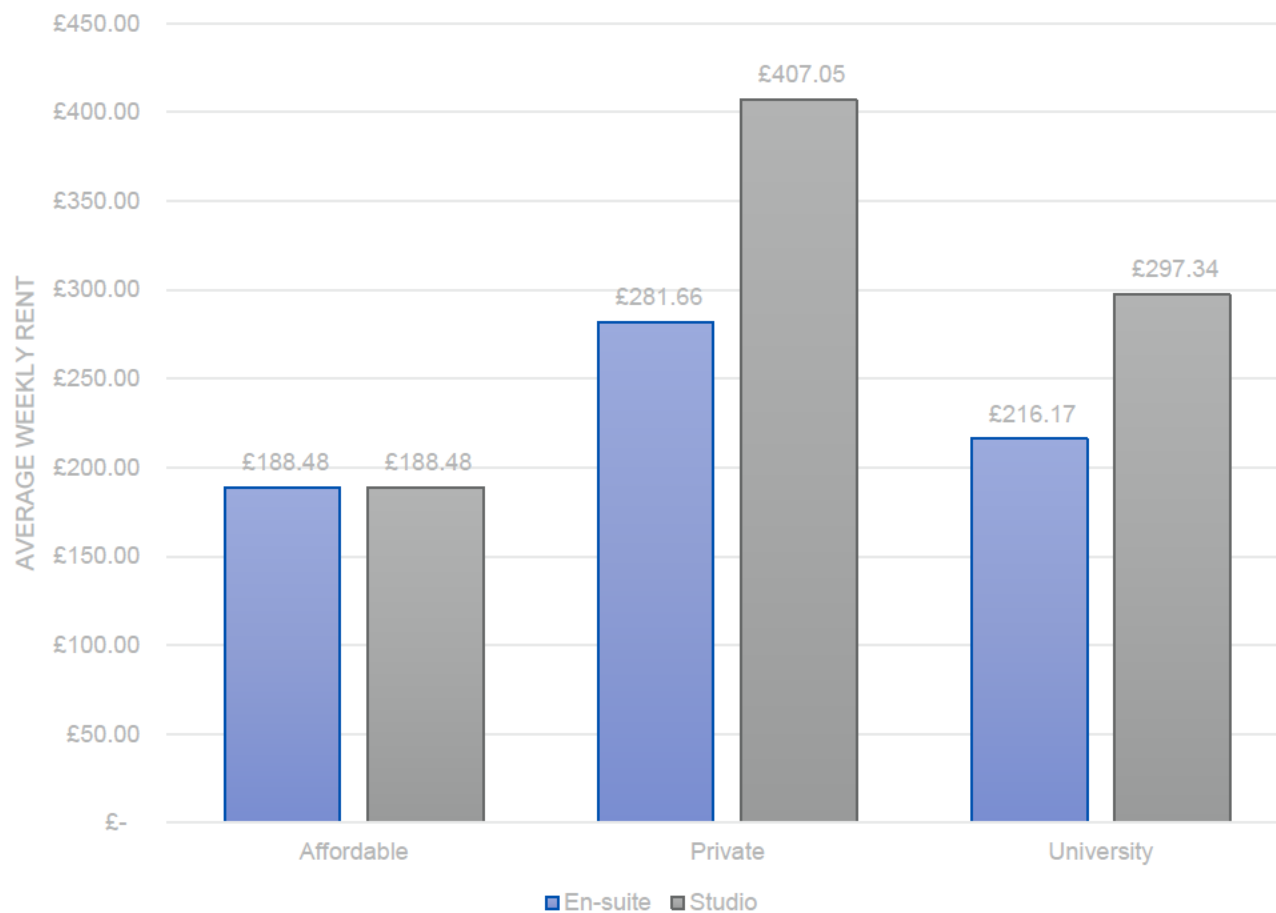
Source: Cushman & Wakefield Student Accommodation Tracker 2023/24

The Cushman & Wakefield Student Accommodation tracker track 718,000 bed spaces in the market, rating each on the quality of room and amenities.

The LLDC area and adjacent borough of Newham has a higher percentage of the good, high and premium quality rooms than the London average, this is due to the fairly modern nature of much of the stock located in the borough. In terms of facilities quality the majority of bed spaces offer good quality facilities, with a small number of beds offering high quality amenities.

# RATE VS AVERAGE UNIVERSITY & PRIVATE

Affordable Average vs Average Private Sector & Average University Sector (all London 2023/24)



Source: Cushman & Wakefield Student Accommodation Tracker

## Analysis

As can be seen from the chart, the affordable London rate is priced considerably below both university and private sector averages.

The rate is 49.3% lower than the average private sector en-suite and 116.0% lower than the studio private sector average.

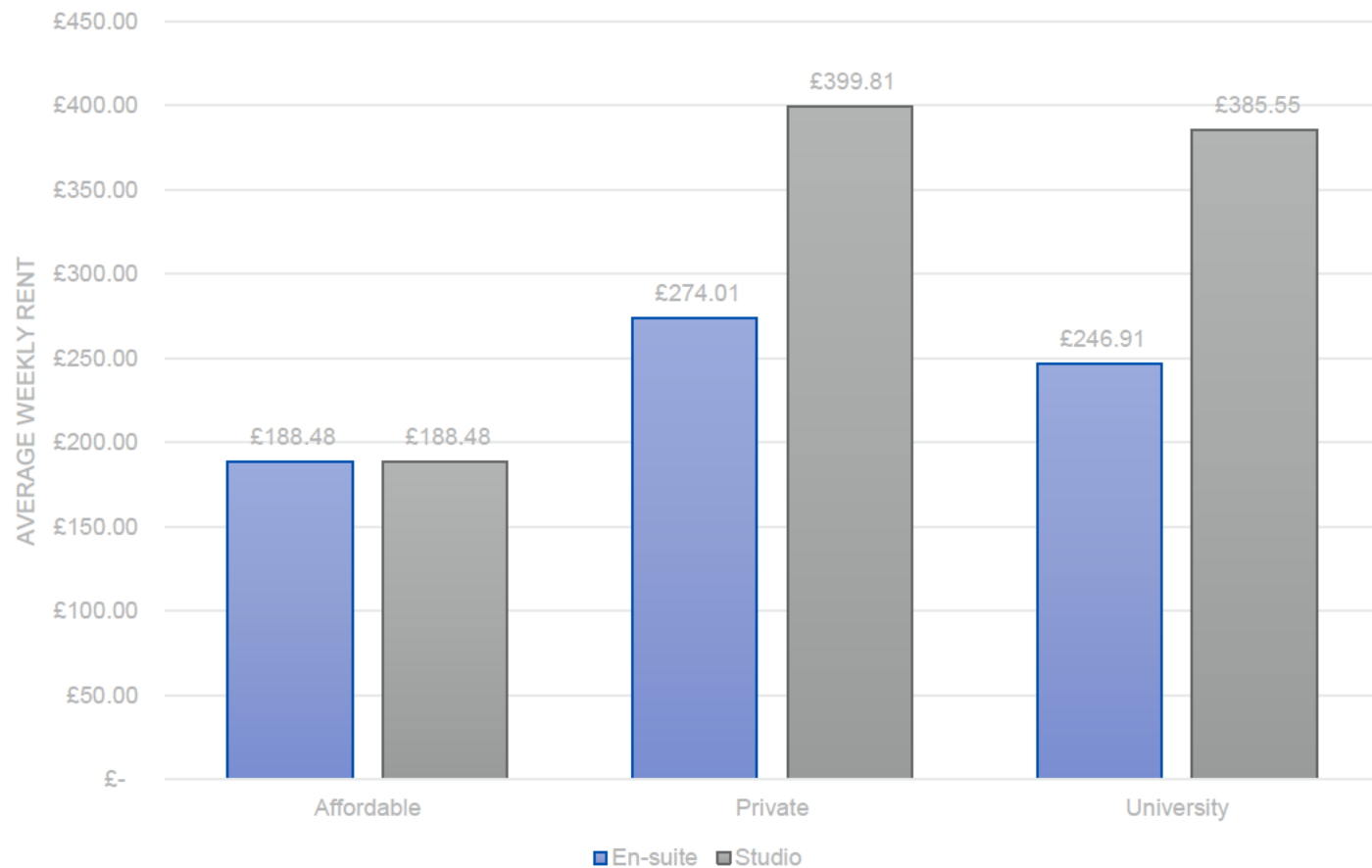
The rate is also 14.7% below the university en-suite average and 57.8% below the university studio average.

Rents are compared to Stratford averages specifically overleaf.



# RATE VS STRATFORD AVERAGE UNIVERSITY & PRIVATE

Affordable Average vs Average Stratford Private Sector & Average Stratford University Sector



Source: Cushman & Wakefield Student Accommodation Tracker

## Analysis

As can be seen from the chart, the affordable London rate is also priced considerably below both university and private sector averages in the Stratford area.

The rate is 45.4% lower than the average private sector en-suite and 112.1% lower than the studio private sector average.

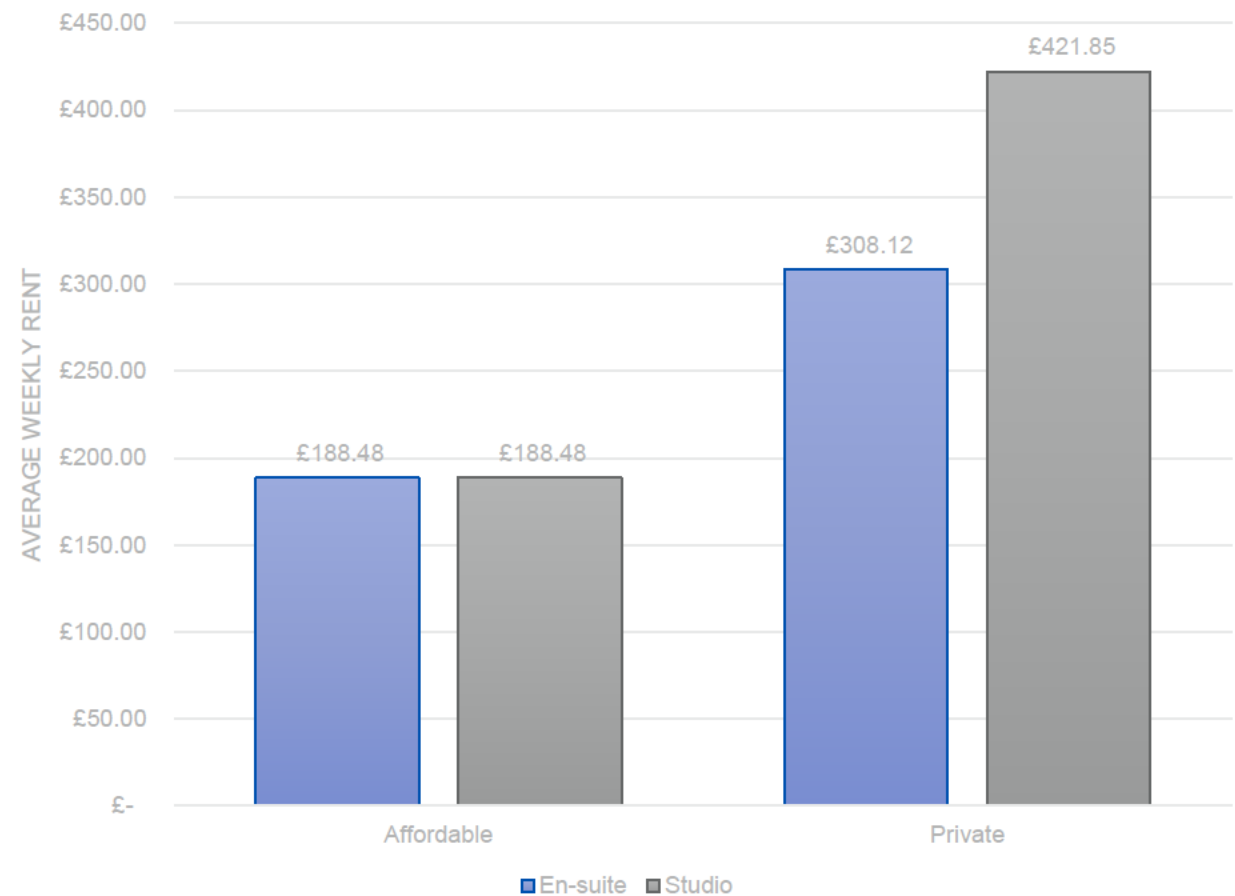
The rate is also 31.0% below the university en-suite average and 104.6% below the university studio average.

Rents are compared to envisaged quality comparators overleaf.



# RATE VS AVERAGE PRIVATE SECTOR QUALITY COMPARATOR

Affordable Average vs Average Private Sector Quality Comparators (all London 2023/24)



Source: Cushman & Wakefield Student Accommodation Tracker

Analysis

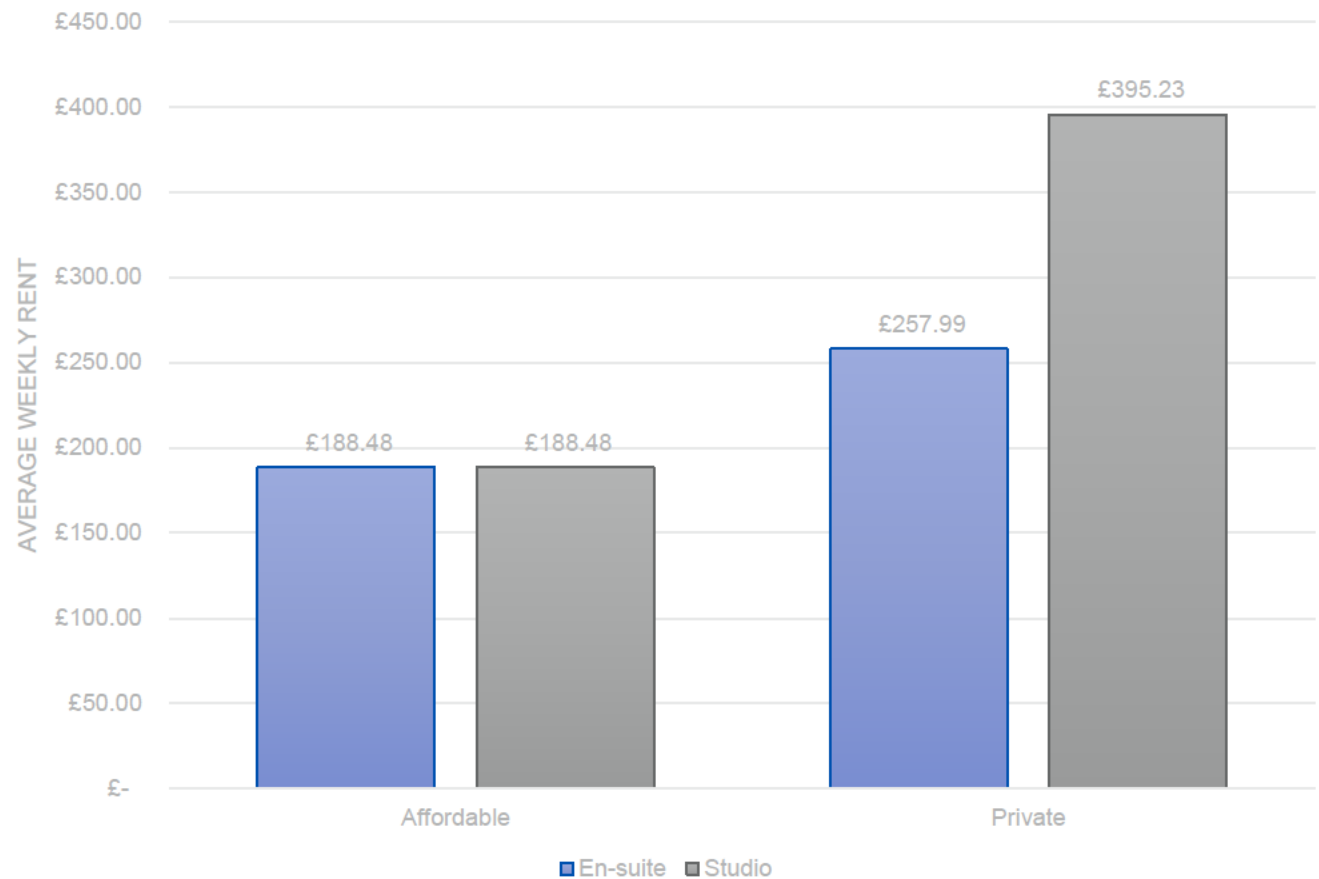
Cushman & Wakefield rates the quality of every room and every amenity space in the UK market on the basis of 1-5 where 1 is the lowest quality and five is the highest. The chart opposite compares affordable rents vs the average rent for products rated at quality level '4' by Cushman & Wakefield – i.e. the proposed accommodation quality envisaged by Dominus for Stratford High Street. Due to the lack of high-quality beds available through London universities, only private sector beds are included in this analysis.

The affordable London rate is 63.5% lower than the average en-suite quality comparator across London and 123.9% lower than the average studio comparator.

These quality comparators are compared across Stratford only overleaf.

# RATE VS AVERAGE PRIVATE SECTOR QUALITY COMPARATOR, STRATFORD

Affordable Average vs Average Private Sector Quality Comparators, Stratford Only



Source: Cushman & Wakefield Student Accommodation Tracker

Analysis

As can be seen from the chart, the affordable London rate is also priced considerably below quality comparator private sector averages in the Stratford area.

The rate is 36.9% lower than the average private sector comparable en-suite.

The rate is also 109.7% lower than the average comparable studio bed.

# SUMMARY

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The London affordable rate is priced significantly below university & private sector averages

The rate is also significantly lower than averages found in Stratford

Dominus is proposing a high quality of accommodation with affordable beds set to be priced markedly below high quality comparators across London & in Stratford

# LONDON AFFORDABLE RATE VS EVERY LONDON INSTITUTION AVERAGE

Affordable Rate vs Every London Institution Average Rate 2023/24 (en-suite and studio rooms)

University	Average Weekly Rent 2023/24	
	En-suite	Studio
Birkbeck, University of London	£313.53	£301.23
Brunel University	£185.70	£334.45
City, University of London	£248.72	
Goldsmith's University of London	£214.37	£288.64
Imperial College London	£228.36	
Intercollegiate University of London	£310.24	£317.10
King's College London	£277.66	£423.58
Kingston University	£180.14	
London School of Economics	£259.92	£366.37
London South Bank University	£192.66	
Middlesex University London	£195.97	
Queen Mary University of London	£196.29	£288.77
Ravensbourne University	£184.00	£264.52
Rose Bruford College	£245.00	
Royal College of Music	£216.00	£247.50
Royal Veterinary College	£243.82	
School of Oriental and African Studies	£218.54	£337.63
St George's University of London	£197.70	
The Courtald Institute of Art	£278.01	
Trinity Laban	£207.36	£275.03
UCFB Wembley	£218.93	£255.68
University College London	£286.64	£331.56
University of East London	£183.36	£218.92
University of Greenwich	£203.04	£273.22
University of London	£262.74	£359.81
University of Roehampton	£206.50	
University of the Arts London	£251.26	£304.50
University of Westminster	£219.82	£253.21

## Analysis

As can be seen from the table, the affordable rate that will be provided as part of the proposed development will be priced below the average rent for en-suites and studios of every London institution except Kingston University and Brunel University (both Zone 6 locations) and the University of East London located in the Docklands area.

This emphasises the huge value the beds will offer, especially given the proposed levels of quality and fit-out.

Source: Cushman & Wakefield Student Accommodation Tracker. All prices exclude catering