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PURPOSE BUILT STUDENT ACCOMMODATION: CHANGING THE FACE OF STUDENT ACCOMMODATION IN SHEFFIELD

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ABSTRACT

The supply of Purpose Built Student Accommodation (PBSA) both nationally and within Sheffield, has increased considerably over the last decade and has played an important role in meeting the demands of both students and the Universities.
This paper examines the current dynamics of the PBSA market in Sheffield, the effect that such accommodation has had upon the remainder of the city's student accommodation, and the extent which the supply and demand may fluctuate in the future, especially in the face of recent changes made to the higher education sector.
These questions were explored through interviews with PBSA providers, student landlords/agents, along with representatives from both Sheffield Universities as well as Sheffield City Council.
The paper concludes that PBSA has had a substantial impact upon the student accommodation market in Sheffield. Whilst facilitating University growth it has also benefited both the student and landlord. However, much uncertainty hangs over the future of student demand in light of increasing University fees, which could have major implications for both PBSA providers and private landlords.

Keywords: Student Accommodation; PBSA; HMO's; Demand; Supply.

INTRODUCTION

Universities are becoming larger and more commercial establishments in order to survive in a competitive market where service to students is paramount. The rising cost of a University education has increased student expectations and student accommodation is one area of provision that Universities have had to re-examine by redeveloping or refurbishing parts of their existing stock or reaching out to private purpose built student accommodation (PBSA) providers to ensure the quality of student accommodation at a time when supply was being increased to satisfy the growth in student numbers. This paper explores the extent to which purpose built student accommodation has altered and affected the student accommodation market in the city of Sheffield.
The sector has undergone rapid growth whilst proving relatively resilient during the recent economic crisis (Knight Frank, 2011). This follows increasing student numbers: UK saw a 34% increase in UCAS applications between 2005 and 2010 (Knight Frank, 2011) and between 2009/10 to 2010/11, a

4% increase in student numbers was achieved (CB Richard Ellis, 2011). The greatest demand is coming from international students and this is expected to continue to grow as the tuition fee increase for UK and EU students helps to stabilise international fees (BBC, 2010). If, as expected, demand from prospective home students drops over the next couple of years, International students may come to play a crucial role in financing Universities.

The growing student accommodation sector has received increased interest from investors, developers and private purpose built student accommodation operators over the last decade. As the demand for student accommodation increased, major developers and PBSA management companies emerged (Unipol and NUS, 2010) and latest figures suggest that the UK Purpose Built Student Accommodation Sector now has a total value in excess of £20 billion.

The demand for student accommodation appears heavily influenced by the circumstances of the student, such as 'the year of study, level of degree course, domicile and institution' (GVA Grimley, 2010, p.3). According to GVA Grimley's report, the private rented sector accounts for over 40% of student's housing needs, whereas University owned and operated halls account for 20% of all students housing needs. Of this number 7% reside in private purpose built student accommodation, with the popularity of self-catered with en-suite accommodation having overtaken single self-catered rooms (Unipol and NUS, 2010). The report supports the traditional 'rite of passage' that students appear to follow when choosing their accommodation whilst at University. First year undergraduate students and international students are the primary candidates to reside in halls of residence or private built student accommodation, whilst older undergraduates and postgraduate students prefer to rent in groups from a private landlord in the traditional student housing market (GVA Grimley, 2010). Nevertheless it has become increasingly apparent that purpose built student accommodation providers are aiming to attract students who would usually rent from a landlord within the student housing market (Hubbard, 2009). Hubbard (2009), also notes the negative effect of PBSA on the rest of the student accommodation sector, challenging the claim that substantial amounts of new build accommodation would have negligible effects on problems of concentration of Houses in Multiple Occupation (HMO's) (Atkins Consulting, 2004).

Studentification has been defined as "the influx of students within privately rented accommodation in particular neighbourhoods" (Smith, 2005, Page 73) creating problems for local residents, such as noise pollution, petty vandalism, pressure on parking…etc. Local opposition towards student housing seems to result from the number, distribution and concentration of HMO's in an area (Kenyon, 1997). "In Birmingham, Exeter, and Sheffield, the opposite approach has been taken, with 'areas of restraint' designated to encourage the building of purpose-built accommodation beyond the main area of HMO concentration" (Hubbard, 2009, p.1909). In this respect, PBSA may have the effect of relieving local housing markets, saturated with students and drawing them towards living in purpose built student accommodation, 'purpose built-developments appear something of a panacea for the problems associated with concentrated student rental in HMO's' (Hubbard, 2009, p.1909). This is a changing market but PBSA has come to play an important role, catalysing change not only within the student accommodation market but within the Higher Education sector as a whole. It has allowed Universities to expand whilst relieving pressure upon the traditional student housing market.

METHODOLOGY

To explore the issues surrounding PSBA in Sheffield data were initially gathered by a questionnaire delivered electronically to students studying in Sheffield which generated 132 responses (see Figure 1). In addition semi structured interviews were carried out with four PBSA operators, four landlords/lettings agents, three representatives from the student accommodation offices from both Universities in Sheffield and a representative from the City Development Division of Sheffield City Council. The recorded interviews lasted for around 30 – 35 minutes. Further quantitative data on the supply of accommodation was also provided by the University accommodation offices.

Quantitative data from the online questionnaires were recorded in a spreadsheet. Analysis of data gathered through interviews took place continuously through the transcription of interview recordings going through a process of physical reduction, involving 'sorting, categorising, prioritising and interrelating data' (Collis and Hussey, 2003, p. 262) and conceptual reduction involving a colour coding of the interview summaries in order to pick out important and recurring themes. Morse's (1994) process of ‘synthesising’ along with Lindlofts’ element of ‘explaining’ were also undertaken, the former comprising of the drawing upon different themes gathered from the research in order to form integrated patterns and an explanation of what is actually occurring.

Year	Responses
1st Year	102
2nd Year (if applicable)	86
3rd Year (if applicable)	53
4th Year (if applicable)	28
5th Year (if applicable)	5
6th Year (if applicable)	3
Masters (if applicable)	25
PhD Year 1 (if applicable)	2
PhD Year 2 (if applicable)	0
PhD Year 3 (if applicable)	0

Figure 1: Breakdown of Questionnaire Responses

DISCUSSION

This section explores the data gathered on the supply of and demand for PBSA in Sheffield, both historically and with some reference to future trends. Current demand is examined in further depth to explore student preferences and in particular the rite of passage hypothesis highlighted by GVA Grimley (2010). Some consideration is given to the wider impacts of the growth in PBSA in terms of quality and price on other sectors as well as the impacts on the wider community and the spatial distribution of student accommodation.

Supply data gathered from the university accommodation offices shows that PBSA development in Sheffield appears to have been at its peak in 2006, with 1,962 beds having been completed. The development of new beds started to slow down in 2007 followed by pronounced drop in 2008. This may have been caused by the recession which could have left construction on many developments suspended, due to insufficient funding. Development volume then appears to have recovered in 2009 but with little development in 2010.

Many argue that PBSA is contributing towards an oversupply of total student accommodation stock within the city of Sheffield. Letting Agent/landlord 1 identifies saturation “We’ve got all the private landlords with all the residential type accommodation like you see here on Ecclesall Road and we’ve also got all the purpose built stuff so now there is an oversaturation without question.” (Letting Agent/Landlord 1, 2011)

“There is an oversupply now (of student accommodation)…there was planning permission granted for a small one on the Ecclesall Road this week, there’s planning permission considered or likely to be granted shortly for an 800 bed ‘student village’ off the Ecclesall Road anytime now…which is astonishing quite frankly because there is an oversupply” (Letting Agent/Landlord 3, 2011)

Such an oversupply does not appear to deter potential providers: “I think what you’ll find is that the private providers especially are very much on the ball. So they’ll only build where there is a market to build.” (PBSA provider 2) A viewed shared by another letting agent/landlord “We’re not at oversupply yet but if it continues at the level it’s going at, within I think 1 to 2 years it would be at oversupply.” (Letting Agent/Landlord 4)

Letting Agent/Landlord 1 suggests that the saturation of student accommodation within the student housing market hasn’t been helped by the economic climate allowing larger landlords to buy properties which have decreased in value as well as making it easier for smaller landlords to enter into the market, contributing towards an oversupply of accommodation and making properties harder to rent “it is getting more and more difficult to let properties…up to about 4 or 5 years ago we would have all our properties, everything would be let by the Christmas break virtually for the following academic

year…its all changed now, come January or February we've still got about 20 properties still to let" (Letting Agent/Landlord 1)
There is evidence that two of the main sources of demand for PSBA are first year students and international students.

International Students

PBSA providers seemed to be in agreement that international students are attracted to purpose built accommodation and demand from international students has increased; "…the internationals have increased. Going back to the international market, that's massively increased" (PBSA Provider 2). One view is that international students don't have the luxury of being able to view property in person and so choose their accommodation on the internet based upon the name of a well known provider, and the number of facilities that the development offers, "…I think a lot of that is because the foreign students are not here in Sheffield. All they can see is what he sees on the internet" (PBSA Provider 3, 2011.) Shah (2010) highlights the demand from international students to be much higher than that of home students, adding that this is influenced by their parents who want assurance that offspring will be taken care of whilst studying in a foreign country.
The corollary is reduced international demand for traditional shared student houses. Letting Agent/Landlord 1 comments, "We have very few (international students) these days…you know even in the past before a lot of the purpose built stuff went up you know, we would have a small number of houses that would contain foreign students…but since the purpose built student accommodation went up, we've had very very few, very few. It might be the odd one in a group of UK students … but we've never had a house that contained a full group of foreign students" Letting Agent/Landlord 3 also supports this trend in the market "We have some good ones (international students) but nothing like the percentage that's at both Universities…if it were 20 percent overseas, we would be less than 5 percent so it doesn't reflect pro rata", whilst Letting Agent/Landlord 4 states "I would say at the moment 5 percent, that's all, it's a small amount."
For international students location is important as they gravitate towards the city centre attracted by the "city living, aspirational sort of lifestyle" (University Accommodation Office). International students will spend more money on location as well as the luxuries that these providers offer. In addition to Shah's (2010) reasons for international student choice, the fact that they are already spending a lot of money out on international fees, increasing the accommodation budget is not so significant. Furthermore, lack of knowledge of the student accommodation market mainly located in the traditional student residential areas make the city centre a convenient option. With PBSA they have the facility of being able to view their room and book it over the internet, with one large private provider even enabling the student to view their potential roommates online before they book.
There is a view that Sheffield Universities will look towards attracting more international students if the number of students applying to the universities from the UK, drops as a result of the introduction of higher fees for UK students. A representative from one PBSA provider in Sheffield comments, "Big market for internationals…I can tell you now that the Universities are now looking at more international bookings, because the internationals obviously pay upfront a lot of the time for their studies, you might get more margin/profit from them…but you'll find the international market will now become essential" International students coming to the Universities to take part in a summer course, have also played an important role with PBSA providers in occupying some of the voids that appear in their developments out of the core student period.

Demand Preferences

For UK students the main attraction of PBSA appears to be ease of obtaining accommodation, without having to search the local housing market for vacancies. However the quality of accommodation found in PBSA does appear play a decisive role in the choice of PBSA rather than the private student housing market, ranking just short of first place in the survey. Woolcock (2010) draws upon this distinct quality of PBSA not usually available in the traditional student housing market, "More students in University Accommodation now have ensuite bathrooms and attractive communal living areas…For those choosing to live with friends in a house rented from a private landlord, however, accommodation is as varied as it ever was". By contrast students who expressed a preference for traditional accommodation the most popular reason for not moving into PBSA quoted by students responding to the questionnaire was the risk of having to share with younger students.

Paradoxically the preference of first year students for PBSA does seem to have reinforced the trend for returning students to gravitate towards traditional accommodation. This is conformed in the interviews conducted with letting agents/landlords. Landlords and letting agents commented upon first year students, who having lived in PBSA upon arrival in Sheffield, find the restrictions imposed motivates them to move away from such accommodation in their second year of study "what we are finding is when we do speak to students, that they don't like the environment that they live in because it is a little bit controlled and a little bit like big brother, they're being watched over all the time, they're being penalised for every last little mark and scratch that they make on the walls" (Letting Agent/Landlord 1). Another interviewee agrees "…they want to leave the confines of the regimentation of a halls of residence where the very large ones have got security guards and all the rest, and they do tend to find that that's a little bit clinical, so they want to get out and get their own house where they've got their own living room, with their own garden with their own space for a barbeque etcetera etcetera and feel it's their home." (Letting Agent/Landlord 2). It appears that for first years, PBSA is ideal for meeting other like minded students who they can then move into a shared house or flat. Thus the "rite of passage" remains amongst many students in Sheffield and many representatives from the private student housing sector imply that they don't feel that this trend is going to change in the near future. "I would say they find their feet, they find their friends and they want a back door in the garden in my experience" (Letting Agent/Landlord 2). Another letting agent/landlord agrees "What tends to happen and you can only generalise because you're gonna get some kids who will want to go back into a hall, and we've had the odd one, but under normal circumstances – this is again a sweeping generalisation, the halls of residence get filled with first year students from all over the country…generally if there's 5 or 6 of them together they'll then they'll go all together and look for a house to stay with together…"(Letting Agent/Landlord 4)

Effect upon the Quality of supply of student housing in Sheffield

Data from interviews with letting agents and landlords confirmed that the increase in PBSA in Sheffield has had an impact on the quality of traditional student accommodation this confirms what is generally known from the literature "now privately managed blocks offer en-suite rooms with double beds, flat screen TV's and free wireless broadband, as well as CCTV coverage around the building to appeal to security-conscious parents. Students get an electronic key, just as in a hotel" (Kollewe, 2010, p.21). But at the same time has had a detrimental effect on those landlords who have not kept property to a satisfactory standard of quality and repair. "The up side, particularly from the tenant point of view is that (PBSA) forced the private sector market (traditional student housing) to up its game in terms of providing better quality accommodation…and also it's forced out a lot, and particularly with the new legislation come in in the last few years, its forced out a lot of the smaller buy to let type landlords who will just buy a house here …and it may not be compliant with regulations….and it has also forced out some of the so called 'professional landlords' or indeed rogue landlords that have had substandard properties, they don't comply to regulation, you know.." (Letting Agent/Landlord 1). This appears to have increased expectations and landlords are less able to get away with sub-standard accommodation "…if I go into a house and see that it's not gonna let cos it's old fashioned furniture, it's flowered carpets, it's dog-eared tatty settees, I'll just say you either change it and come with me or you don't and thank you very much but get someone else". Kollewe (2010) reminds us of this former standard of student accommodation which society viewed as almost normal, that which students 'just accepted'. "Student halls of residence have come a long way since the days of the TV series The Young Ones." (Kollewe, 2010, p.21).

Price

As the quality of accommodation in the traditional student housing market has been improving, so has the price increased? Interviews suggest that PBSA has effectively been able to cap the amount which landlords feel they can charge "…with all the purpose built stuff that's gone up, you know it's been to the benefit of the student tenant as its kept rent rates at a fairly stable level over the past few years" (Letting Agent/Landlord 2). Yet, it has also made rent increases in the student housing market seem much more acceptable. "it's not all bad news, those landlords who are on the ball have found that they have a good product, attractive in the market to student and parent who expect contemporary existence and are used to paying a lot of money in the hall of residence (PBSA). It has allowed them some price discretion" (Letting Agent/Landlord 3)

Nevertheless, as properties are becoming increasingly difficult to let because of the increased competition in the market, landlords have become much more prudent in how much they charge and this is also influenced by a threshold which the Sheffield market appears to have set. "…the sort of ceiling appears to be in Sheffield for the private landlord is around the £70 mark, maybe £72 or pushing it up to £75, but you do find a lot of landlords even if they have refurbished a property and it's really high quality, they are very nervous about going over that threshold."(Letting Agent/Landlord 1)

Accommodation within the traditional student housing sector is amongst the cheapest in the UK, "Students can save money by renting privately…the biggest savings were to be found in Sheffield and Birmingham". (O'Grady, 2011) This nervousness over rent increases can be seen reflected in the behaviour of rental values. It has been recognised that when increasing rents, landlords will tend to mirror the behaviour of other landlords as they don't want to be priced out of the market. "…they're (landlords) very savvy in looking at what one another's doing and you'll occasionally find they may not move for a couple of years and then they'll bump up all of a sudden and they'll all bump up together…they're very much a reactive type of business." (University Accommodation Office)

Utility bills are included in many PBSA tenancies however as Hubbard (2009) highlights PBSA providers who pass increasing utility bills onto their rents may deter students at a time when value for money is key (CBRE, 2011), as budgets will be tightened as a result of increasing tuition fees. This feature of PBSA has forced certain landlords either into adopting all inclusive rents or at least considering them in order to keep up with competition within the market as well as student demand. "it is something that every year we have this chat about it, whether we should do an all inclusive…to be honest when you've got a large number of houses like us, it does become a bit of an administrative nightmare" (Letting agent/Landlord 1) One letting agent/landlord has even adopted a range of different priced contracts, each one reflecting a range of different utilities included, "…they've got three options but the majority 99 percent of the time students go for the all inclusive" (Letting agent/Landlord 4).

Future Demand

Introduction of higher fees is clouding the future. Higher costs may force more students to study at home and may also encourage the "earn while you learn" culture of part time study. If there is a decrease in the number of first year students entering Universities in Sheffield and an increase in part time students, then this will clearly reduce demand.

Neither of the two Universities in Sheffield know exactly how the market is going to behave in the near future, although when interviewed, accommodation office representatives appeared confident that student intake will remain firm even when the increase in fees has been introduced "(my)personal view is at the moment…is that I think it's unlikely to have a major effect…simply because of the standard of the University…I'm not sure there's going to be a massive impact on the Russell Group Institutions if you like, the courses are there, the reputations there and I think students will realise that the money is there and the whole student loan payback isn't that scary". But even the post 1992 University commented "they're looking at figures between 10 and 30 percent reduction in student numbers but we all know that there are at least that many waiting to backfill anyway at this moment in time".

This may of course be wishful thinking and most commentators acknowledge one trend that might appear over the next few years is an increase in the number of students living at home, either on a part time or full time course, in order to save money and cut down on living costs whilst at University. LV= (2011) research predicts that 52% of all younger students will choose a local higher education establishment and stay at home to live with their parents, leaving university cities as 'ghost towns' by 2020. However 52% represents the highest decline in Newcastle upon Tyne with Sheffield being ranked 3rd highest with a predicted decline in the local student population of 42%. Nevertheless these findings are questionable being based on a survey of about 1,000 students and parents (LV=, 2011, p.3). The issue is much more complex. "everyone's very much in this bubble now whereby next year, they don't actually know what's going to happen…are the numbers going to dwindle, are students going to want more value for money, absolutely they always do anyway, are they going to want it all inclusive?..." (PBSA Provider 2, 2011)

Wider Policy Issues

One of the aims of introducing PBSA development into Sheffield was to reduce student numbers within areas of already high student population, a result of limited University accommodation in the city which caused an overflow of first year students living in shared housing. "…Universities maintained a certain amount of traditional hall type accommodation …and then everybody else had to go into the private rented market and what was increasingly happening was the conversion of family houses into student lets" (Sheffield City Council, 2011). Morgan and McDowell (1979) highlight the emergence of this nationwide problem as far back as the early 1980's.

The increased availability of traditional housing for returning students has in some instances enabled housing to be released back into the local community, contributing to a much more balanced neighbourhoods (Smith, 2008). All these consequences have contributed an indirect effect upon the spatial distribution of student properties in Sheffield. "As a new block has been built, what you tend to find is the older style poorer quality pieces of accommodation have gone by the wayside and so we've tended to sell them. So what you'll find is, areas of Sheffield that were highly studentified if you like, have become more residential than a student area. For example Meersbrook, Nether Edge, Walkley, certain areas of Crookes, Abbeydale Road, Highfields, are all slowly turning back into residential areas." (Letting Agent/Landlord 4, 2011) This therefore has resulted in a higher concentration of student properties closer to the city centre where the supply of better quality accommodation tends now to be situated (closer towards the Universities) in order to meet the demands of the students (Letting Agent/Landlord 3).

As part of the planning agreement to build a new student village in the grounds of one of the two universities in the city the University was required to release some of their own housing stock back into the market with restrictive covenants detailing that the property could not be used in the future as an HMOs (House in Multiple Occupancy). One important planning requirement that will be coming into effect in Sheffield in the near future is a condition known as Article 4 which has been created with the aim of controlling the increasing number of student houses in multiple occupation (HMOs) in an already saturated student area. It will therefore require that dwelling houses (use order class C3) require planning permission in order to be converted into an HMO (use order class C4) in order to house 3-6 unrelated people, in areas already saturated with properties that satisfy the same use. Whether planning permission will be granted or not will depend on whether the requirements in the policy 'Creating Mixed Communities' (CS41) are met (Sheffield City Council). This policy sets out to limit shared housing (including purpose built student accommodation and larger HMOs for 7 or more people) and will not grant planning permission where more than 20% of residences within 200 metres of the application site are also shared housing.

It was ascertained during an interview with a representative from Sheffield City Council City Development Division (2011) "we've encouraged student accommodation where there hasn't been a predominance of it but we've tried to cap it at sort of about 30% of the total stock (housing stock of any particular area) and then to encourage further provision to move on to other areas". The interviewee then follows that this has been to reduce ghettoised areas of student accommodation development which may be found in other cities.

CONCLUSIONS

Purpose built student accommodation has increased the standards of accommodation in the housing sector to such an extent that sub standard properties in Sheffield are becoming unlettable and the landlords of these properties are consequently being forced out of the student housing market. The increase in PBSA supply had undoubtedly improved the quality of student housing and it has also increased rents. At the same time PBSA rents are effectively placing a cap on the amount private landlords can charge in the marketplace.

The increase in PBSA supply has allowed both Sheffield Universities to offer improved accommodation and expand student numbers without placing increased pressure on the local housing market because the perimeter boundaries of student accommodation areas in Sheffield have shrunk back as former student properties are released back into the local housing stock, reducing the extent of studentification in a number of areas of the city. It is also the case though that PBSA has saturated the student accommodation market, making it harder for landlords within the private student housing market to survive as demand for their properties has been reduced.

Sheffield had the benefit of large scale PBSA development before the financial crises struck. The current period of economic uncertainty appears to have contributed to the slowdown of PBSA development in the city. Nevertheless the data do suggest that there may still be potential for more PBSA development, albeit concentrated in much smaller scale developments than those which took place in 2006/07. With just under 18,000 known purpose built student beds and a student intake of about 13,000 students in 2010, there appears to be a sufficient supply of PBSA for first year students in Sheffield, with the excess supply being met by either by post-graduate students or returning undergraduates wishing to remain in or go back into PBSA. The main source of demand for PBSA in Sheffield remains first year students as older students prefer not to live with younger students and are put off by high cost, and lack of independence. Yet, PBSA appears increasingly popular with international students.

The future is uncertain because of the wider impact of increased tuition fees in 2012. There may well be an increase in the number of first year students living at home although this might be balanced by an increase in international students. But whatever the future may hold for the housing market, it is clear that landlords will have to continue to increase standards and remain flexible within the market place. This will ensure that they meet the demands of the students, whatever their demographic. Rising utility costs for example are leading to the appearance of all inclusive rents from private landlords as a popular choice amongst students. Landlords need seriously to consider all possible methods through which they can increase the demand for their properties, in order to set themselves apart in a market that is becoming increasingly dominated by purpose built student accommodation. Furthermore, potential developers must ensure a close relationship with both Universities in the city and obtain projected intake figures for the coming years. If Universities cap student numbers in a market where there is already limited demand for PBSA, then development wouldn't be a sensible option.

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