

The delivery of PBSA across Walthamstow Town Centre

Ensuring a symbiotic relationship with urban regeneration efforts to produce inclusive neighbourhoods and a successful economy.

May 2024



Waltham Forest

URBAN LAB PLANNING

Executive summary

This report was commissioned by the London Borough of Walthamstow (LBWF). Following a wider literature review and case-study analysis of Waltham Forest's Affordable Housing Commission (WFAHC), this report's intention is to inform best planning practice specific to Walthamstow Town Centre (WTC) regarding its provision of purpose-built student accommodation (PBSA). This is to ensure that the incoming students of Portsmouth University's new London campus(es) are housed in an approach which supports WTC's regeneration initiatives. To support this regeneration, the report concludes with recommendations to facilitate the production of a diverse housing stock to accommodate inclusive, sustainable communities which maximise opportunities for economic reinvestment. The solutions offered highlight the importance of early engagement between LBWF and both PBSA and Built-to-Rent (BtR) providers, and the potential of mixing Class E commercial space into PBSA to aid both community integration and reinvestment.

Contents

Abbreviations and acronyms	4
Figures and tables	5
Introduction	6
Methodology	7
Results and discussion	8
Protection of a diverse PRS housing stock	8
Mixed housing delivery: 'civic connectivity' and social cohesion	11
Minimising the transience of the incoming student population	12
Recommendations and conclusions	15
Reference list	16
Appendix	18

Abbreviations and acronyms

BtR	Built to Rent
HE	Higher Education
DLPG	Draft London Plan Guidance
GLA	Greater London Authority
HMO	House in Multiple Occupation
LBWF	London Borough of Waltham Forest
LMU	London Metropolitan University
LP	London Plan
MOPAC	Mayor's Office for Policing and Crime
PBSA	Purpose Built Student Accommodation
PRS	Private Rented Sector
TfL	Transport for London
UoP	University of Portsmouth
UoPL	University of Portsmouth London
WFAHC	Waltham Forest Affordable Housing Commission
WFHS	Waltham Forest Housing Strategy
WFLP	Waltham Forest Local Plan
WTC	Walthamstow Town Centre

Figures and tables

Figure	Description
1	Densities of Waltham Forest's PRS households
2	Identification of BtR housing delivery
3	Emergent LBWF thinking on the positioning of future PBSA site allocations

Table	Description
1	Statistics extracted from WFAHC (2023)
2	Comparing the socioeconomic benefits as students transition from 'apprentice gentrifiers' to become 'gentrifiers'

Introduction

In September 2023, Waltham Forest discarded its status as the only northeast London Borough without a Higher Education (HE) institute following the opening of the University of Portsmouth's (UoP) London campus in Juniper House, opposite Walthamstow Central station (Martin, 2023). Demonstrative of the rapidly expanding physical footprint of HE through the rise of 'satellite' campuses (Revington *et al.*, 2020), the intentions of "London's new *local* university", the 'University of Portsmouth London' (UoPL) are ambitious (UoP, 2024, para.1). This is clear from its imminent intention to expand to form a more traditional style campus at Central House to house up to 7,000 students and boost Waltham Forest's economy by an estimated £372 million over the next 20 years through the creation of new jobs and business opportunities (Martin, 2023). To actualise these ambitions, the successful provision of PBSA across Waltham Forest is paramount and undoubtedly, the borough's urban core, Walthamstow Town Centre (WTC), will play a pivotal role in achieving this. This is particularly since the borough's only current PBSA, Mannequin House and Canvas Walthamstow, are concentrated around Blackhorse Road station, serving wider London Universities (Amber, 2024).

Turley's (2022) PBSA report denotes the highly variant policy backdrop surrounding the provision of this accommodation across the UK. It concludes that policy concerning factors including locational preferences, affordable student housing quantum and the protections given to wider housing stocks, vary greatly geographically. This report has therefore synthesised a range of secondary research to best guide Waltham Forest's provision of PBSA. This guidance aims to ensure a positive symbiotic relationship is achieved with both WTC's regeneration initiatives and the newly adopted Waltham Forest Local Plan (WFLP). Most applicably, PBSA and the economic stimulus it offers, as explored in the proceeding discussion, must aim to facilitate WFLP Strategic Objectives 2 and 3. These respectively aim to "attract inward investment" and "improve life chances by improving job opportunities and providing new access to skills [and] training" (LBWF, 2024a, p.13). This in turn offers the potential to reap great regenerative benefits across WTC.

Methodology

This report was produced from both a wider literature review and case-study analysis of Waltham Forest's Affordable Housing Commission (WFAHC) and its associated evidence base. Draft London Plan Guidance on PBSA (DPLG) and a study by Lin and Ma (2020) on the transient residence of university students further informed the discussion. For completeness, additional secondary sources were analysed in order to seminally place these works in dialogue to inform best planning practice across WTC in relation to its imminent provision of PBSA.

Results and discussion

DLPG on PBSA (see Appendix 1) denotes urban regeneration as premised ultimately on new flows of both people and activity into a location (GLA, 2023). It is therefore unsurprising that regenerative benefits are frequently foundational to the principle of development surrounding PBSA schemes (Turley, 2022). As highlighted in Appendix 1, this is because the development of PBSA directly catalyses new swathes of a youthful demographic into urban areas. This demographic can typically then bolster spending power, catalyse shifts in the availability of housing stock and provide a valuable employment resource to benefit both existing local businesses and attract new enterprise. Collectively, this can compliment the regeneration of urban areas.

The results and discussion will be divided into the following 3 sub-sections considered to best inform the planning of PBSA across WTC:

1. Protection of a diverse PRS housing stock
2. Mixed housing delivery: ‘civic connectivity’ and social cohesion
3. Minimising the transience of the incoming student population

Protection of a diverse PRS housing stock

Table 1: Statistics extracted from WFAHC (2023).

Time frame	LBWF Statistic
2011 – 2019	Private rent increased on average by 42%
2011 – 2019	Average PRS tenant now paying 7% more of ‘basic pay’ on rent (at 44%)
2011 - 2022	LBWF achieved highest proportion of Affordable Housing of any borough, at 35% of all new homes built
2011 – present	The fastest growth rate (118%) of market housing prices of any London Borough (London average seeing 65% growth)
2011 – present	An additional 3,500 individuals living in PRS
By 2030	PRS projected to become the dominant housing tenure
Present	73% of private renters live within 800m of a train station

Looking at Table 1, the affordability of market housing prices across the borough have been significantly stretched over the last decade, with an increase in average property values 53% above London’s average increase of 65%. Evidently therefore, private-rented sector (PRS) housing currently plays, and most importantly *will continue* to play,

a pivotal role in meeting LBWF's general housing need. Highlighting this further, the production of a designated, borough-wide PRS strategy was identified as a key recommendation following the council's Housing Commission (WFAHC, 2023). One reason potentially being because research highlights that the provision of PBSA significantly impacts an area's housing stock by directly affecting the availability of other types of PRS properties. Reinforcing this, Turley (2022) illustrate how the provision of PBSA routinely reduces the pressure on wider PRS housing stocks by minimising the number of family homes which become converted into student-rented HMOs. Increased competition from the reduced availability that already characterises private rentals, has significantly contributed to the 42% increase in rents seen across LBWF since 2011 (WFAHC, 2023). Even as recently as between 2022-2023, the outer London Boroughs saw on average, a 13% increase in private rents (LBWF, 2024b).

Since urban planning is *anticipatory* not reactionary to the market forces surrounding student accommodation (Revington *et al.*, 2020), consideration must duly be taken towards this data. An adequate supply of PBSA to house as many as possible of the circa 7,000 new UoPL students is necessary to protect the availability of both high rates of home ownership and a diverse PRS housing stock. The latter of which is often relied upon as a significant source of both affordable and family housing. Such diversity to an area's housing stock is fundamental to generating inclusive and mixed neighbourhoods; what the GLA (2023) coins, 'sustainable' communities and what Waltham Forest must strive to facilitate through its regeneration of WTC. A diverse housing stock, aided by the delivery of PBSA, will subsequently help plateau the exponential growth seen across both rental and marketing housing costs. This in turn will help ensure that young professionals and those associated with higher disposable spending powers aren't deterred from moving into and remaining in central Walthamstow, and ultimately re-investing back into the local economy.

Heightened consideration must duly be taken towards LBWF's forthcoming Site Allocations document to ensure that the council's planning for PBSA does not compromise a diverse housing stock across WTC. Set out below are two maps taken from WFAHC's evidence base. Figure 1 illustrates the high volume (73%) of private renters living proximate to a train/underground station and the high resulting proportion based in WTC compared to the wider borough. Figure 2 highlights the most suitable

sites identified from the commission for BtR housing, a type of purpose-built, private rented accommodation which the WFAHC (2023) concluded is in short supply across Waltham Forest. The identification of suitable BtR allocation areas is premised similarly on transport connectivity but also a youthful demographic. This again results in a strong favouring towards site allocations across WTC and LBWF’s secondary urban core, Leytonstone Town Centre.

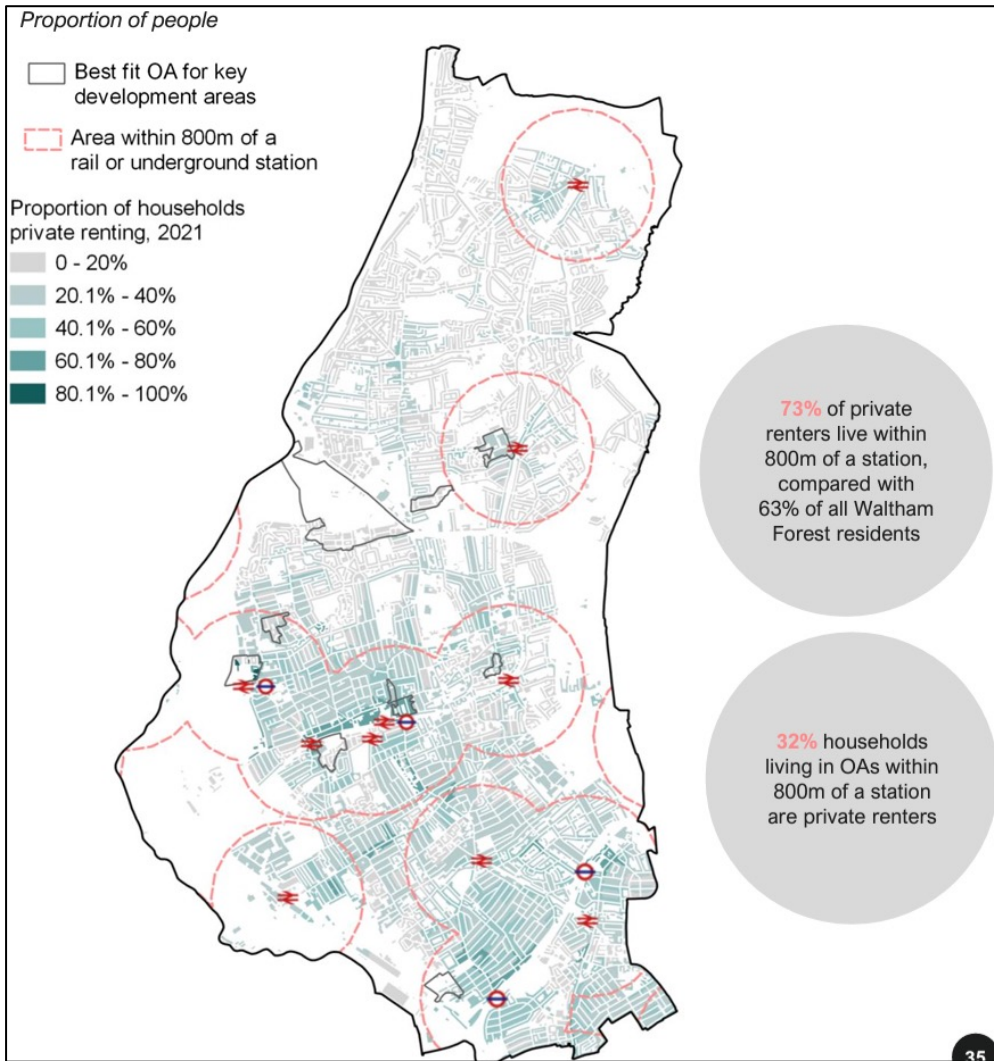


Figure 1: Densities of Waltham Forest’s PRS households (WFAHC, 2023).

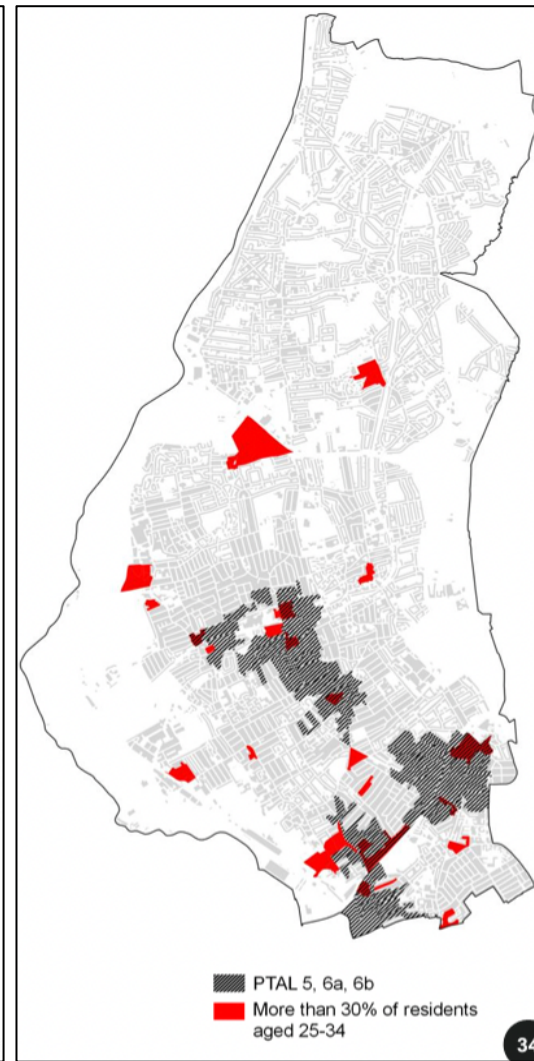


Figure 2: Identification of BtR housing delivery (WFAHC, 2023).

Part B of London Plan (LP) Policy H15 similarly encourages the provision of PBSA in areas with high PTAL ratings to facilitate connectivity to campus facilities and bolster the potential for such development to comprise wider mixed-use regeneration initiatives (GLA, 2021). Consequently, it is highly likely that there may be significant overlap in the sites allocated for PBSA and BtR respectively across WTC. This must be accounted for in LBWF’s emerging Site Allocations document since the delivery of

PBSA must not compromise that of much-needed affordable, purpose-built PRS housing and *vice versa*. To ensure this, early engagement and cross-collaboration between the council and both PBSA and BtR providers is essential to establish how the council will work in partnership to deliver a diverse housing mix.

Mixed housing delivery: ‘civic connectivity’ and social cohesion

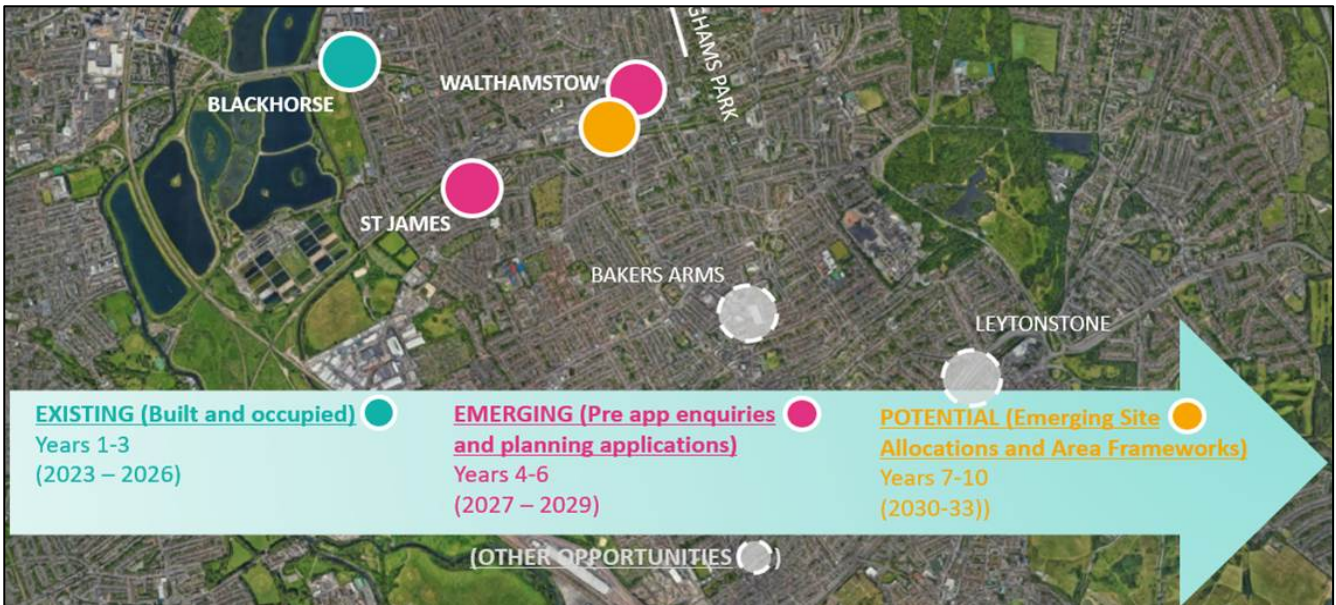


Figure 3: Emergent LBWF thinking on the positioning of future PBSA site allocations (LBWF, 2024c).

As favoured by both the GLA (2023) and Part B of LP Policy H15, the potential to combine PBSA with both PRS and market housing delivery could be one solution from their mirrored locational preferences. Reinforcing the potential for this mixed delivery, Figure 3 displays the council’s emergent thinking on future site allocations for PBSA across WTC and the wider borough. Unsurprisingly, all ‘existing’ and ‘emerging’ sites spanning 2023-2029 of UoPL’s inception, located across Blackhorse, St James and ‘Walthamstow’, are immediately proximate to an underground station, obtaining high PTAL ratings (5-6a). As discussed, these central and connected sites are simultaneously ones where the provision of both purpose-built PRS housing, such as BtR schemes, would also be highly successful. This strengthens the potential solution to offer mixed deliveries of both PBSA and PRS on the same sites to form diverse and inclusive blocks at higher residential densities. Actualising this approach would echo that of Juniper House, UoPL’s initial base, which is itself spread across two floors of a 17-storey building containing 91 residential units (Marcelline, 2023).

Such an integrated approach to the delivery of PBSA may also help ensure that Waltham Forest continues (as set out in table 1) to achieve its extremely successful rates of Affordable Housing. With it, this would ensure that PBSA delivery across WTC maximises its potential to generate community and social value (Savills, 2023). Heightening this, at UoPL's opening, the University's Vice-Chancellor spoke of the importance of "civic connectivity through the [UoPL] project" to prevent its campus and student accommodation forming uninviting, self-contained student enclaves (Martin, 2023, para.7). Conceptualising this sentiment, research by Revington *et al.* (2020) exposes the negative residential geographies emergent from student accommodation that remains isolated to the existing communities they become placed in. Coining this occurrence the 'urban dormitory', Revington *et al.* (2020) take aim at the notoriously negative impacts of 'studentification' typified by influxes of students with lively and contrasting lifestyles to extant residents into student accommodation which offers no social integration. To limit any segregation between students and Walthamstow residents, the provision of PBSA combined with alternative housing typologies in a geographically dispersed manner, may be an alternative solution.

Subsequently, the increased dispersal of UoPL students across a higher quantity of sites, each with lower student quantum, may better dissipate secondary benefits. Such benefits could include higher levels of footfall both day and night across the entirety of WTC rather than only at fewer, clustered hotspots. This is since the 'student pound' often skews service needs towards an increasingly 24/7, night-time economy (Lin and Ma, 2020). This could subsequently compliment both LBWF's (2023) 'Safe Streets, Safe Homes' initiative and the forthcoming report into Womens' Safety across WTC undertaken by TfL and MOPAC.

Minimising the 'transience' of the incoming student population

To fully reap the longer-term socioeconomic benefits that new swathes of students can bring to Walthamstow, it is important that the often transient residence of students is limited (Lin and Ma, 2020). Conveying this, Lin and Ma (2020) provide the following table delineating the socioeconomic benefits which arise as students transition from what they term 'apprentice' gentrifiers to (full) gentrifiers as they progress into full-time

employment. Though taken from a metropolitan context in Asia, this data offers transferrable insight to a UK-context.

Table 2: Comparing the socioeconomic benefits as students transition from 'apprentice gentrifiers' to become 'gentrifiers' (Lin and Ma, 2020).

Gentrifier	Apprentice Gentrifier
Gentrification	Studentification
Middle class (consumer)	College students (consumer)
Young adults with families, or social experience	Young people who are single and have no children
Replacing the local working class	Replacing the local working class
Possession of economic capital in order to occupy a certain position in the labour market	Have limited economic capital and are not yet regularly involved in the distribution of work in the labour market
Choosing longer-lasting living spaces in the life cycle	Seeking temporary living space
Shifting housing conditions are associated with gentrifying areas	Limited housing conditions (rental vs. multi-family housing), associated with gentrification (student-oriented) areas
The debate on social integration and segregation	Social isolation
Contribute to the transformation or advancement of social class bases	Not related to a shift in social class base or social advancement
A positive boost to local real estate prices	It has not been proven that it has a positive effect on local real estate prices, but rather creates so-called "student slums".

Ultimately, it shows that as students become young professionals, they chose 'longer-lasting' living spaces where they obtain increasingly secure positions in labour markets and become middle-class consumers possessing greater economic capital to invest into local economies. To realise this potential, the GLA (2023) stresses the importance of a diverse housing stock, stipulating that students not only graduate from their studies, but also from their student housing tenures (see Appendix 1). LBWF must strongly consider this if choosing to house as many students as possible in PBSA, as this means it will be at the end of students' studies where they transition into longer-term PRS housing. This is a volatile life stage where students can easily move elsewhere and with them, their economic capital as (full) 'gentrifiers'. A priority for LBWF must therefore be to minimise this occurrence.

One take home from this reinforces, as discussed prior, of ensuring that PBSA across WTC does not impede the construction of affordable PRS housing. This is because BtR housing for example, is directly intended for young professionals and with it,

attractive and attainable living prospects for graduates transitioning out of HE. Simply put, if LBWF allows its rental market to continue becoming increasingly unaffordable and oversaturated in part from *controllable* factors such as supply, the likelihood of retaining the spending power and economic activity offered from newly-employed UoPL graduates across WTC will be reduced.

Further maximising the longer-term residence of UoPL students post-graduation, it's important that social integration with Walthamstow as a community, as discussed prior, is emboldened. Key to achieving this will be the actualisation of UoPL's intention, as per its marketing, to provide "work-based learning opportunities in the form of apprenticeships ... with the skills and needs of *local people and businesses* in mind" (Martin, 2023, para. 6). This intent is concretised from UoPL's provision of unarguably more career-focused, practical STEM courses, including Business Management, Computer Science, Digital Marketing and Construction Project Management (UoP, 2023). This typifies a trend found across London's pool of satellite university campuses which often tug on the branding of London as a locality boasting prospective industrial connections that one can benefit from (Brooks and Waters, 2018).

The feeding of post-graduate prospects into degree apprenticeship programmes and industrial experience will prove key in helping retain students across WTC by rooting them into career pathways in locally-based businesses. Aligning with the WFLP's 'Central Waltham Forest Vision', the creation of flexible UoPL workspaces across its PBSA provision could help achieve as such (LBWF, 2024a). Maximising the high footfall and activity rates of PBSA's central and highly-connected locations, such workspaces could take the form of publicly accessible commercial and/or co-working (Class E) space. This may help encourage partnerships between the local economy and UoPL. In turn, from physical proximity, through either structured programmes or informal arrangements, these spaces could incubate connectivity between students and local employment opportunities, as successfully seen at London Metropolitan University's 'Accelerator' campus (LMU, 2024). Cohering with the GLA (2023), a similar approach on designated floors of new PBSA developed may lessen the likelihood of social segregation surrounding the incoming student population. At the same time, this would beneficially strengthen the future of Walthamstow's labour market by increasing the likelihood of students remaining after graduation.

Recommendations and conclusions

With a variable policy context surrounding PBSA provision, this report has highlighted that a balance must be met between the delivery of PBSA and the protections given to both LBWF's current and future PRS (particularly affordable) housing stock. This will help ensure that WTC's urban regeneration creates diverse, cohesive and therefore sustainable communities. This in turn will help augment the borough's likelihood at attracting and retaining highly qualified, youthful demographics who obtain significant spending power to further re-invest into the local economy, in tandem with WFLP strategic objectives 2 and 3.

Recommendations to achieve this include:

1. Early engagement between LBWF and both PBSA and BtR providers to explore the potential to allocate mixed deliveries on sites across WTC in the council's forthcoming site allocations document.
2. Protect wider PRS housing stocks to help curb exponential growth in rental costs, create inclusive neighbourhoods and limit the transience of students.
3. Mix commercial uses (e.g. co-working spaces) into PBSA provision to incubate both structured and informal connectivity with local enterprise to aid community integration and the likelihood of UoPL students residing in LBWF longer-term.

Reference list

Amber (2024) *Student Accommodations in Walthamstow, London*. Available at: <https://amberstudent.com/> (Accessed: 23 April 2024).

Brooks, R. and Waters, J. (2018) Signalling the 'Multi-Local' University? The Place of the City in the Growth of London-Based Satellite Campuses, and the Implications for Social Stratification, *Social Sciences*, 7(10): 1-16.

GLA (2021) *The London Plan: The Spatial Development Strategy for Greater London*. Available at: <https://www.london.gov.uk/programmes-strategies/planning/london-plan/new-london-plan/london-plan-2021> (Accessed: 28 April 2024).

GLA (2023) Draft London Plan Guidance: Purpose-built Student Accommodation. Available at: <https://www.london.gov.uk/programmes-strategies/planning/implementing-london-plan/london-plan-guidance/purpose-built-student-accommodation-london-plan-guidance> (Accessed: 30 April 2024).

Lin, T. and Ma, F. (2020) The Economic Impacts of Studentification on Local Communities - A Review of the Literature Based on Cross-Strait Studies, *Academic Journal of Humanities & Social Sciences*, 3(8): 30-40.

London Borough of Waltham Forest (2023) *Taking action to end violence against Women and Girls*. Available at: <https://www.walthamforest.gov.uk/neighbourhoods/crime-and-community-safety/community-safety/violence-against-women-and-girls/safe> (Accessed: 23 April 2024).

London Borough of Waltham Forest (2024a) *Waltham Forest Local Plan Part 1: Shaping the Borough 2020-2035*. Available at: <https://www.walthamforest.gov.uk/planning-and-building-control/planning-policy/local-plan> (Accessed: 18 April 2024).

London Borough of Waltham Forest (2024b) *Waltham Forest Housing Strategy: Good homes as the foundation for a happy and healthy life*. Available at: <chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://democracy.walthamforest.gov.uk/documents/s93998/Appendix%20A%20-%20Draft%20Housing%20Strategy.pdf> (Accessed: 23 April 2024).

London Borough of Waltham Forest (2024c) 'Consideration of PBSA site allocations' [PowerPoint Presentation]. Available at: request to the council (Accessed: 23 April 2024).

London Metropolitan University (2024) *Accelerator*. Available at: <https://www.londonmet.ac.uk/contact-us/how-to-find-us/accelerator/> (Accessed: 30 April 2024).

Marcelline, M. (2023) 'Walthamstow high-rise block opens to residents after four year build', *Waltham Forest Echo*, 8 December. Available at:

<https://walthamforestecho.co.uk/2023/12/08/walthamstow-high-rise-block-opens-to-residents-after-four-year-build/> (Accessed: 30 April 2024).

Martin, K. (2023) University of Portsmouth London to open, *'The Pie News'*, 26 September. Available at: <https://thepienews.com/news/university-of-portsmouth-launches-london-campus/> (Accessed: 28 April 2024).

Revington N., Moos M., Henry J. and Haider, R. (2020) The urban dormitory: Planning, studentification, and the construction of an off-campus student housing market, *International Planning Studies*, 25(2): 189–205.

Savills (2023) *UK Purpose-Built Student Accommodation Spotlight*. Available at: https://www.savills.co.uk/research_articles/229130/346721-0 (Accessed: 21 April 2024).

Turley (2022) *PBSA: a resilient sector in challenging times*. Available at: <https://www.turley.co.uk/comment/pbsa-resilient-sector-challenging-times> (Accessed: 23 April 2024).

University of Portsmouth (2023) *University officially launches its London campus in Waltham Forest: University of Portsmouth London will support our ambitious commitment to become the top modern university in the UK*. Available at: <https://www.port.ac.uk/news-events-and-blogs/news/university-officially-launches-its-london-campus-in-waltham-forest> (Accessed: 18 April 2024).

University of Portsmouth (2024) *University of Portsmouth London: London's new local university at the heart of Waltham Forest*. Available at: <https://www.port.ac.uk/university-of-portsmouth-london> (Accessed: 23 April 2024).

Waltham Forest Affordable Housing Commission (2023) *Waltham Forest Affordable Housing Commission: Final Commission Report*. Available at: <https://www.walthamforest.gov.uk/housing/waltham-forest-affordable-housing-commission> (Accessed: 23 April 2024).

Appendix 1: The role of PBSA to planning policy objectives (GLA, 2023)

Box 1: the role of PBSA in meeting different policy objectives as part of mixed and inclusive neighbourhoods

Housing need is met by PBSA directly through housing students (including those with particular affordability and/or disability-related needs), and indirectly through helping to **alleviate pressure on traditional rented homes**. It may also have a role in supporting wider housing delivery.

This is a shift compared to the situation in the 2010s. Consumer surveys suggest 'all-inclusive' rents and properties and brand quality are increasingly significant in students' housing choices. This reflects the desire to have more predictable bills, and dedicated study, sleeping and social spaces that are well designed and maintained. PBSA should therefore now have more **potential to attract students out of the private rental sector, alleviating demand pressures**. However, current indications suggest a lack of PBSA supply relative to growing numbers of students, which is instead contributing to **competition and higher rents in the private rental market**.

In areas where there is a lot of ongoing housing development, PBSA, along with related housing types **(such as Build to Rent)** has the potential to **provide diversification that can help with market absorption**. In this way, it can support delivery of overall housing numbers while meeting an important segment of housing need.

Support for the economy is achieved by the **students' spending in their local areas and taking on part time jobs** during their studies. Being able to offer accommodation guarantees (e.g. to first-year students) through PBSA is also important to the universities competing for students domestically and internationally, as it contributes to their ongoing viability, **growth and world-class status**. In turn, many **people who study in London stay here** after graduating, and go on to be part of London's highly qualified workforce and **pool of innovative entrepreneurs**. This underpins crucial economic sectors, from research and development to creative industries and professional services.

Regeneration impacts are realised through the **new activity and people** that are brought to an area: people who live, spend and work in the neighbourhood, adding to what exists currently. **Some students may go on to be longer-term residents, particularly where there is an appropriate mix of conventional housing (and workspace) in an area that they can 'graduate' into**. This can contribute to the **creation of new communities** where an area has seen population instability, or where the land use is changing to become more residential.