

CHILDREN, EDUCATION AND SKILLS

Research on purpose-built student accommodation (PBSA)
and student housing in Scotland



**UK COLLABORATIVE
CENTRE FOR
HOUSING EVIDENCE**

Research Team

Kenneth Gibb¹, Tom Moore², Jennifer Preece³, Jennifer Hoolachan⁴, Moira Munro¹, John Boyle⁵, Gillian McLees⁵ and Gareth James¹

1 University of Glasgow/ UK Collaborative Centre for Housing Evidence

2 University of Liverpool/ UK Collaborative Centre for Housing Evidence

3 University of Sheffield/ UK Collaborative Centre for Housing Evidence

4 University of Cardiff

5 Rettie and Co



**University
of Glasgow**



**UNIVERSITY OF
LIVERPOOL**



**The
University
Of
Sheffield.**



RETTIE

Key Messages

- Student accommodation in Scotland is a complex, interdependent system interacting with local housing systems and communities.
- Student numbers and accommodation demand are rising. However, there are strains emerging from external shocks, such as the Covid-19 pandemic, from internal processes, such as landlord retreat from student housing in the Homes in Multiple Occupation (HMO) private rented sector (PRS), and political risk from ongoing housing and educational policy developments.
- There is considerable variety to be found among student HMO private renting, university-owned PBSA (student halls) and the growing private PBSA sector.
- Student experiences are also varied, in large part because the existing stock of student accommodation dominates total provision and the average quality of this changes slowly.
- Private sector PBSA is market-driven, which evokes a range of divergent perspectives. The sector should approach PBSA in a joined-up way, so that diverging views can be reconciled and compromises sought.
- New PBSA developments continue to move upmarket and, with the signalled decline of mainstream PRS, there needs to be a wider range of accommodation provision. The sector should work together to deliver more mid-range, lower cost PBSA.
- There is limited data on variations in student housing affordability. The sector needs robust and regular, data on students' economic circumstances and the affordability of different types of accommodation throughout Scotland.

Study Background and Methods

This research summary provides an overview of the main findings from a research project commissioned in January 2022 by the Scottish Government. The research was commissioned to inform the work of the Purpose Built Student Accommodation

(PBSA) Review Group, who have been tasked with the development of a Student Accommodation Strategy for Scotland. The research was carried out by a team from the UK Collaborative Centre for Housing Evidence (CaCHE), along with colleagues from the University of Cardiff and Rettie and Co.

In addition to a comprehensive review of relevant literature, the research involved engaging with key stakeholders and students. The research team interviewed or met with:

- 6 Scotland-level representatives (representing universities, colleges, students, PBSA providers, investors and regulatory oversight)
- 10 case study representatives (Glasgow, Edinburgh and Dundee/St Andrews) of educational institutions, local government (housing or planning leads) and PBSA providers (2 interviewees commented on national and case study level questions)
- 4 meetings with Scottish Government and other public sector representatives to discuss aspects of the overlap between the project and their interests
- A focus group of senior UK level staff offered by one PBSA provider
- The workshop findings of a meeting between the Review Group and the Research team discussing emerging findings in late June 2022.

The first stage of data collection with students involved an online survey. The survey gauged the perceptions and experiences of students, identifying emerging themes and differences between students in different housing circumstances and locations. In addition, the survey collected demographic data, including their housing tenure, age, gender identity, sexual orientation, experience of physical or mental health conditions or illnesses, ethnicity, sexual orientation, religion, and experience of family estrangement. The survey was open to students aged 18+ living in one of the case study areas. The survey was distributed from April 2022 – June 2022. In total, the survey received 908 responses. The survey was largely completed by students in higher education – only 36 of the 908 respondents declared themselves to be studying a college course.

A key purpose of the survey was to support recruitment for semi-structured one-to-one interviews. Students were given an option in the survey to agree to be contacted for a follow-up interview. 45 interviews were undertaken between April and June 2022 in tandem with the survey: 15 with students living in Glasgow, 15 with students living in Edinburgh, and 15 with students living in Dundee (8) and St Andrews (7).

Study Context

PBSA is accommodation specifically designed, built or adapted for the purpose of housing students. It may be on- or off-campus, and owned or managed by a university, private or third sector provider. This includes accommodation which is occupied through nominations agreements (allocation of rooms taken by the university within a private/charitable provider block), or through direct let by a private or charitable provider. There is a definition of student accommodation in paragraph 5 of schedule 1 of the [Private Housing \(Tenancies\) \(Scotland\) Act 2016](#). This defines student accommodation either by reference to the identity of the landlord (universities, colleges etc.) or the planning permission for the accommodation (construction, conversion, change of use etc.). About one-quarter of UK full-time and sandwich students live in PBSA during term-time; private renting (PRS) (including HMOs) remains a popular accommodation option for many (27%), 22% will stay in the family home and 19% in their own home.

The [2020-21 Programme for Government](#) described PBSA as a 'high-profile policy area', stressing the need for a Review:

In the context of the significant growth in purpose-built student accommodation and COVID-19, we will conduct in 2021 a review of purpose-built student accommodation, in partnership with stakeholders. This will be taken forwards in parallel with work to ensure rent affordability and improving standards across the Private Rented Sector.

Student accommodation is also central to the ongoing reforms to the wider rental sector, as part of the sector-wide implementation of [Housing to 2040](#).

Several factors explain the increase in concerns about student accommodation in Scotland. The first of these is the increasing demand for student accommodation that flows from increasing student numbers. As numbers continue to rise, there is clearly going to be greater pressure on these modes of provision as well as the more traditional rental market.

A second driver is reform to the private rented sector. The new private tenancy arrangements for Scotland were legislated for in 2016 ([The Private Housing \(Tenancies\) \(Scotland\) Act 2016](#)), creating open-ended tenancies, finite and reduced means of repossession by landlords and a 28 days' cooling off period for tenants at the start of tenancies. Students living in university owned or private PBSA were *exempted* from this legislation, such that they would continue to be housed under a common law contract with the provider. However, the majority of students living away from home are in the HMO PRS and would be covered by the new tenancy arrangements, thus creating a division in rights and law.

Third, the Covid-19 pandemic and lockdown created an awareness of the significant challenges facing students in private PBSA and student halls in terms of isolation, mental wellbeing, educational experience and financial precarity. Many international students stayed away and took courses online remotely. The Scottish Government introduced temporary measures, for instance, giving all students 28 days' notice to quit (recently suspended). This in turn has put pressure on the business model of PBSA providers.

Figure 1 is a schematic representation of the drivers of student accommodation in Scotland and how they may interrelate with each other. Key drivers include: student demand, wider housing policy, the PBSA provider/investor business model, the wider HMO rental market, local development planning norms and housing strategy

concerns. Two-way arrows indicate plausible two-way relations. The diagram is inherently multidimensional and helps us to recognise the complexity and multiplicity of student accommodation issues.

Figure 1: Drivers of PBSA Provision



The Evidence Review – Main Messages

- The evidence indicates that PBSA has and is continuing to grow at a significant rate, with no indication that current investment is slowing down.
- PBSA is believed to hold several advantages over more traditional forms of student accommodation, such as traditional private renting, and, in theory, is of better quality, is more professionalised, is a solution to tensions created by studentification and aligns with ideas of enhancing the ‘student experience’.
- However, not all PBSA is the same and there are indications of varying quality as well as problems with unaffordability, at least for some student groups.
- PRS/HMO accommodation remains the preferred choice for students in some areas. [Cushman & Wakefield \(2021\) annual report](#) estimated that the largest student PRS HMO markets in the UK were in Edinburgh and Glasgow.
- The [Scottish Government \(2022a\) scoping study](#) also highlighted challenges relating to student mental health, adapted accommodation for students with disabilities, inconsistencies in support for estranged or care-experienced students as well as broader issues linked to the fact that student housing is exempt from the Scottish Private Rental Tenancy.
- Further research is needed to explore the nuanced experiences of different groups of students who are likely to be disadvantaged in relation to housing. Remarkably, most evidence has not included the voices and experiences of students themselves. Much existing evidence is based on elite stakeholders, secondary data such as census reports, financial projections and analysis of online PBSA advertisements. This study has sought to rectify this by capturing data from both key stakeholders and students to explore how PBSA is working in practice for these groups.

Key Messages from Stakeholder Interview Findings

- Proposals from stakeholders to address affordability problems included those who argued for Scottish Government increasing funding for students or other approaches e.g. bursaries, but also others who stressed the need for much better evidence on student costs and resources, to help quantify and address affordability properly.
- There was considerable support to encourage the supply-side to develop more midrange, more affordable accommodation (and not rely on older, depreciating student accommodation to provide lower rents).
- Regulation and the 28 days' notice period are the sharper areas for different views held strongly by student bodies in opposition (to different degrees) to the supply-side (providers, investors and institutions).
- A key question for the Review to consider is to what extent can and should Scotland move away from the present situation where anomalies of treatment for PBSA student accommodation exist relative to the PRS, and for which different constituencies and policymakers argue for and against maintenance of the status quo? Is there, instead, a different balance that can be found which does not undermine the fundamental business model or the educational objectives of the HE sector, and at the same time does not lead to narrowed choice and unaffordability for growing numbers of students?
- There is no requirement for HMO PRS to tell the local landlord register that lets are for students, creating difficulties in fully understanding the size and range of student accommodation as a whole and particularly via the HMO private rental market. The information and evidence problems we have identified within the PBSA segment apply, in different ways, across all student accommodation.
- On redress – nomination agreements are a good way potentially to ensure student complaints about private PBSA are heard through the educational provider input. We note the discrepancy between a more sceptical NUS Scotland and other stakeholder views regarding whether the forms of redress

are adequate and sufficient, or in fact whether students either do not really understand how they can seek redress and in what circumstances.

- Dundee/St Andrews, Glasgow and Edinburgh universities have all frequently exceeded their targets for guaranteed places and usually in the hundreds per year. This is a worrying situation given the tightness of the student accommodation market and the inevitable delay between identifying an investment opportunity and getting new supply available to students. In between times, universities are obliged to be creative and look to different often sub-optimal solutions to meet their guarantees to students.

Overall, there is a supply-side view seeking to defend the system as it largely is (e.g. returning to the pre-COVID system of not having 28 day notice periods) or proposing incremental change only for areas like accommodation mix, achieving affordability and regulating PBSA. The NUS Scotland view is that the private sector is highly deregulated, is often very expensive, that there is some poor quality and poor practice, and a sense that it is not clear that redress works effectively and certainly not consistently.

Key Messages from Student Interviews

- There is substantial variation among students in terms of their ability to find, choose and afford accommodation.
- Prior to arriving at university, many students reported that they did not have a strong awareness of the local housing market, and that housing options did not form part of their decision-making over where to study.
- Findings suggest that students tend to find it easy to find PBSA and are well supported with this by universities, compared to students in the PRS who were more likely to report difficulties in accessing suitable and affordable accommodation. Difficulties in accessing the PRS guided some students to live in PBSA instead.
- Students are attracted to PBSA for different reasons, including the opportunity to socialise and make friends when starting new courses or

moving to new locations, though preferences vary in terms of its suitability for students in later years of study.

- Location is an important consideration for students, with students prioritising proximity to university buildings and keen to avoid living in locations that lead to higher travel costs.
- There were mixed views as to whether PBSA adequately accounts for a range of household types and needs. Students with different household types, such as families or those with pets, reported difficulties in finding suitable accommodation. Disabled students and those with long-term health conditions also highlighted challenges in finding suitable PBSA, often due to issues of access or expectations over the level of shared amenities and space.
- Students generally perceived PBSA to be expensive within local housing markets, with no discernible difference between university and private PBSA.
- However, views on value for money varied and were contingent on the relative price of other forms of accommodation. In areas where the PRS was in high demand and characterised by high rents, PBSA was perceived as good value for money. In areas where PRS rents were lower, students were willing to trade this off for the positive attributes of PBSA living.
- In general, students who participated in interviews were relatively satisfied with PBSA. Many reported that their accommodation was uniform and functional in design, but that this matched their expectations and needs.
- Students valued key design details such as access to natural light, views of green space, and ventilation in buildings.
- Communal spaces in PBSA were valued by students, though some felt that some older PBSA does not provide enough of this space. Use of communal space varies according to household relationships, with some students dissuaded from using space where they do not have positive or comfortable relationships with those they share with.
- The extent to which students felt at home in PBSA varied. Some described feeling at home and attempted to personalise their rooms but were restricted

from doing so by providers. Others did not feel at home, sometimes because of poor household relationships or by an expectation that they may not live in PBSA for long.

- Students felt that staff in university-owned PBSA played an important role with respect to wellbeing and on-site security, though many students had a minimal relationship with their provider restricted to requests for repairs and maintenance.
- Students in PBSA were less aware of their tenancy rights than those in the PRS and some were dissatisfied with the perceived inflexibility of tenancy agreements in the PBSA sector.
- Students noted that universities attempted to be inclusive and diverse experiences and appreciated attempts to promote these within institutions and accommodation.
- However, students highlighted areas where this could be improved, including how the needs of disabled students are understood, the diversity of accommodation provision in meeting the diverse needs of students, and how positive relationships between students from different cultural and demographic backgrounds can be promoted once they are living together.

Challenges and Considerations

The PBSA Review in Scotland is wide-ranging and as it progressed this feature simply grew more with a broader set of interests wishing to provide evidence and their reflections on the future of student housing. We have tried to keep recommendations focused and directly relevant to the needs of the plural interests of the sector and in particular the students that are to be catered for. Throughout we have also tried to think about student accommodation as a system and one that overlaps with higher education and the housing sectors. We note six key challenges facing the Scottish PBSA sector (private and university-provided):

- Demand for student accommodation is high and growing. There will continue to be large numbers of international students and also a high probability that, in future years, more home students will come from lower income widening access backgrounds, thereby increasing affordability pressures across student accommodation provision.
- There appears to be gaps in the market provision associated with developer and investors moving up-market (and declining numbers of university halls). This supports the argument in favour of more modest, but sufficient quality, mid-range PBSA supply.
- Student voices and their representatives (as well as other stakeholders) argue for better provision of accessible housing for disabled students without higher cost penalties. There is also concern expressed by students and their representatives about the effectiveness of redress measures.
- There is debate around the future of student rights in PBSA and whether they should remain exempt from aspects of private renting tenancy law.
- Rented housing reform is underway and a recent consultation exercise found considerable support for rent control in the PRS and for students to enjoy the same rights as other private tenants, including PRS renting students. This presents a challenge for the PBSA sector.
- For some stakeholders, PBSA has shifted from being a modern solution to 'studentification' and poor quality PRS student accommodation, to becoming a key part of the problem of perceived new forms of neighbourhood dominance. The challenge is how the sector can work more effectively with planners and local authority housing strategy teams to address this.

Below are considerations for the PBSA Review Group, as they prepare their final recommendations for Ministers.

The Current Model of PBSA Provision

A positive case can be made for private and university PBSA provision. PBSA has been a remarkable success in terms of the private sector providing accommodation for students that universities could not – or did not want – to provide. At the same time, universities have upgraded their existing provision and become partners with the private sector. PBSA has effectively created an additional source of supply, relieving pressure that would have been hard to manage within existing stock/willingness to offer PRS.

The challenge from quarters in government and student bodies regarding possible extension of rights, notice periods and rent caps across all student accommodation would threaten the university, investor and provider business. Retaining the present broad approach to PBSA is to continue to set it apart from the rest of the private rented sector. How can this be more acceptable to those arguing for universality of rights? It requires compensating actions on regulation, redress, affordability, rent-setting and the supply offer made by the supply interests. We introduce some of these ideas directly below and also under later consideration headings.

The quid pro quo might include a series of elements. Strengthening the combination of HMO licensing and Unipol National Codes as the chief way of regulating PBSA. A more visible set of combined regulations, with regular renewal and inspections more readily understood by students through more transparent and regular communications, in particular in the area of redress – and a capacity and willingness to amend approaches locally and nationally, are essential. There should be a commitment to expand new/refurbished affordable PBSA as a larger market segment (also part of the response to the changing demographic of future student demand including more on precarious incomes).

This package should include a cautious expansion of repurposing of vacant city centre office and retail space (particularly so being mindful of quality issues, following some of the difficulties found with the expansion of Permitted Development Rights for office-to-residential conversions in England). There could also be a presumption of flexibility and fair dealing towards the end of annual contracts (e.g. building on the break clauses already in contracts and the informal practice that appears to already exist that allows students to leave a week or two early at the end of a 44 week contract). There should also be the expectation of monitoring students comprehensively in terms of accommodation experience across all protected characteristics, but also international students, care-experienced and estranged students. A particular effort in this regard must be made to strengthen the accessibility and appropriateness of PBSA properties for disabled students, without penalising their ability to pay and be fully involved in the student experience. Wider monitoring should include more comprehensive and robust analysis of affordability (discussed further below).

Student Housing, Local Housing Strategies and Needs Analysis

Both the National Planning Framework and local housing needs demand assessments should take explicit account of student housing demand and its impact on local housing systems. Future demand growth should be a material concern regarding development plans and housing strategies. Student housing should also be a planning focus for housing strategies including the traditional HMO sector. Landlord registration data should routinely capture whether or not the property is aimed at students.

Affordability and Evidence

We cannot properly debate or make definitive recommendations around rents and affordability, as well as wider student experiences, without credible and regularly updated empirical information. Representative and statistically significant data should be a priority if the sector is to evidence robustly the levels of affordability, student financial circumstances, and do so at the local level. This is true of both the

PBSA and HMO PRS segments. Qualitative data collected in this study suggests that many students believe that housing costs relative to their financial resources are a problem. Housing cost data should distinguish whether or not utilities are included and, if so, which elements, as well as providing accurate data on the property, amenities provided and other key property attributes. The resources data should seek to understand all sources of student income and distinguish between temporary, part-time, and full-time jobs and, critically, the significance of parental or other financial contributions and borrowing, commercial or less so. Enhancing the data available will give greater insight into these issues across Scotland. Data should be collected annually (especially during dynamic economic and financial times such as the present). Each HEI and local authority with HEIs and FE (with student accommodation) should have a robust minimum survey sample target size, including targets for students with different protected characteristics. Providers should contribute to this sector-wide initiative since all parties stand to benefit directly from better publicly available data.

The current debates in Scottish housing about the meaning, nature and a shared sense of rental affordability should also inform the development of student affordability and cost of living analysis. Affordability is inherently a subjective, normative judgement about what a third party thinks is a tolerable financial burden that can be borne by certain groups of the population in question. There is no objectively correct answer. Instead, we need a sector-wide consensual agreement about what is not acceptable and then develop policies to protect the most exposed to unaffordable housing costs and unprecedented energy costs and general inflation. However, we also need sufficiently fine-grain robust data to operationalise this idea. We simply do not have this at the moment and that has to change.

Cost of Living

We recognise that high rental costs and financial precarity are a reality for some students *now* and that without intervention this may only get worse in the foreseeable future. The Scottish Government does intend to introduce some form of

rent controls to the private rented sector and there are constituencies seeking rent freezes as a response to the current cost of living crisis. Student accommodation cannot be immune or wholly separate from these debates. As the NUS says, seeking rent fairness is a valid option.

In the short run, we recommend that PBSA providers move more to some form of consistent cost-based index-linking of rent increases and that students as residents get the full benefit of any energy cost supports offered by government or others. HEIs involved in partnerships like nomination agreements should seek such a move away from benchmarking rent increases against competitors, and instead focus on cost inflation.

In the medium term, there should be a sector wide review of both how rents are set in the first place and how they are increased each year. One of our interviewees within the HEI community argued that rationalising rent increases does not address inflated base rents. A review of rent structures might therefore also involve a sense of what good quality mid-point rents ought to be for different classes and vintages of PBSA housing. This has close parallels to current Scottish debates about rent control for the PRS, which has included examination of models in operation in France and Germany which set base rents when a tenancy commences by ensuring that the rent is no more than e.g. 10% +/- for a similar property type and size. Subsequent rent increases are targeted to an agreed formula. Initial rents here and with PBSA are clearly important determinants of what happens next. This is why the key informant is right to argue that these need to be examined alongside principles for rent increases in a context where energy and wider cost inflation is so out of control.

At the same time, and as evidence of unaffordability and rent pressures grows, this may also necessitate a linked review of the funding of student support for living while studying, ranging from parental support, loans, bursaries and maintenance grants to reviewing the part time student labour market (e.g. in terms of supporting student living wage minima as part of the Fair Work agenda).

Maximising Partnerships

In order to apply the information generated by the more active monitoring of students and their accommodation, there should be a more consistent relationship between the pastoral duties of the HEI in situations where students are living in private PBSA. All students living in PBSA should have a direct link to their university or college and those educational institutions should have formal relationships with the provider, focusing exclusively on the wellbeing of the individual students. There is good practice from both sides of the sector (as indicated by ASRA and CUBO in our stakeholder interviews) that should be emulated more widely.

At the same time there needs to be more proactive engagement from the beginning of the student's lease that includes clear advice on where to go to get help externally if the relationship with the provider is not working and redress can be made and easily understood regarding how to go about it. The stakeholders provided quite different perspectives about the extent and the adequacy of current arrangements. Student interviews appear to back up the NUS view that certainly there are students who either do not understand their powers of redress or feel unable to take them up. More must be done to make it consistently easier for those affected to be able to get timely redress.

Working with the Traditional PRS

In parallel to these proposals for the PBSA sector, there needs to be more concerted supportive action to maintain and improve the quality and experience of the large number of students in the traditional HMO PRS. This remains a popular choice for many students. Proposals for greater enforcement capacity in the sector more broadly would also help students, for instance, one stop portals that explain rights and obligations for both parties and where to go to get help if in dispute. We feel strongly that, although this is a report about PBSA, the close and symbiotic relationship between the traditional and PBSA market segments of the system of student accommodation is such that they have to be considered in the round. The

problems that are evident in certain Scottish cities, where there appears to be an overall shortage of rental market housing for students, makes this point clear.

It is undoubtedly challenging to understand better what is going on in the largely atomised and highly variable private rented sector but this is precisely why HEIs and providers need to work more closely with local authority housing planners and strategy teams. There is much information and intelligence to share. A starting point would be to convince Government to include whether a property is let to students in the landlord register (with current proposals on the table to reform it in any case). Second, student accommodation needs should be a legitimate part of housing strategies and development plans and PBSA providers and HEIs ought to be involved in strategic discussions about their cities and towns, not least because of their knowledge about these rental markets.

Moving with the Times

We need to recognise that PBSA activity is not uniform or monolithic but is constantly evolving. The Scottish Government and the parties to the Review need to recognise and reflect on these changes: bespoke student hotels for part-time and modular students, partnerships with Build to Rent and also new forms of delivery working more or less closely with specific educational providers. Our stakeholders have suggested several of these innovations and examples of good practice (e.g. student hotels) and possible future innovations (sometimes borrowing ideas already found elsewhere in the UK such as novel partnerships between investors, providers and HEIs, or indeed positive innovation through specific Build to Rent models). At the same time, we recognise the scepticism and rather negative experience of the growth of permitted development rights for re-use of existing buildings in England and caution against their use in ways that may make student housing quality and experience worse rather than better. There is clearly an opportunity to re-use existing vacant properties in good locations, but the refit of the property must be of good quality and of such high standards that it competes with the best quality in its class and such that it will easily pass reasonable regulatory standards.

Widening the Offer

Linked to the previous point, there is much interest in closing the gap in the market that arises because of the shrinking volume of traditional HMO renting available and the apparent appetite for more affordable private PBSA. New development is relatively upmarket, studios rather than ensuite rooms, and rents are correspondingly high. There was much interest and claims of underlying substantial demand, for a cheaper and less frills budget offering akin to a 'Premier Inn' mid-market hospitality model. This may not be the optimal solution but we recommend that the Review Group and Ministers consider more fully how different interventions (e.g. soft government loans) and re-positioning for instance of refurbished student halls or other refitted properties might achieve similar ends. We note that the NUS expressed concern about how this would further stratify the quality of the available PBSA units by ability to pay and the concern that many students would be condemned to poorer quality accommodation. We do not accept that developing a new affordable midrange sector need contribute to such a problem but agree that that there have to be minimum standards required of all such property, including attention to issues of quality and design (see below). Regulation is also an important dimension in protecting standards and quality. However, the sector needs to better understand why developer and investors are not filling this gap and what would be needed to be done to encourage that additional segment.

Quality and Design

The study has highlighted a range of student preferences and concerns in relation to the design and layout of accommodation, including proximity to neighbouring buildings, internal design and suitability for students with disabilities, access to natural light and outdoor space, and provision of common spaces. These aspects of accommodation have a significant impact on student experiences and should be borne in mind during the planning and (re)development of new PBSA, considering the density and design of new-builds and suitability of accommodation that might be refurbished to increase supply. We strongly encourage new PBSA developments to

include user-testing and post-occupancy surveys to help with design work, including their suitability for disabled students.

Future-Proofing

The HE sector planning assumption appears to be that future housing demand from domestic students will include increasing numbers of lower income students coming from widening participation backgrounds over the next decade or more. When the sector is responding to rising student demand it needs to recognise the greater financial or economic insecurity of a larger part of its market and provide a wider range of accommodation. This study has highlighted that the reasons for living in PBSA (or not) and experiences of it are not universal and vary significantly within the student population. Again, evidence and data is essential but there will, rightly, be calls on the student accommodation sector to moderate housing costs and also for the wider sector, including government, to consider how this can be affordable for students while also viable for the providers, investors and HEIs. The parties should be planning now how they balance these competing objectives in society's interest and not just their own. The Scottish Governments' arbitrating role is therefore critical.



© Crown copyright 2022

You may re-use this information (excluding logos and images) free of charge in any format or medium, under the terms of the Open Government Licence.

To view this licence, visit <http://www.nationalarchives.gov.uk/doc/open-government-licence/> or e-mail: psi@nationalarchives.gsi.gov.uk.

Where we have identified any third party copyright information you will need to obtain permission from the copyright holders concerned.

The views expressed in this report are those of the researcher and do not necessarily represent those of the Scottish Government or Scottish Ministers.

This report is available on the Scottish Government Publications Website (<http://www.gov.scot/Publications/Recent>)

The Scottish Government
St Andrew's House
Edinburgh
EH1 3DG

ISBN: 978-1-80525-318-1

Published by the Scottish Government, December 2022