

The Pillow
Economy:
A UK and Polish
Perspective



Universities need their A-game when it comes to student accommodation



By Martin Bates,
Director, Broadway Malyan

This year will mark a decade since the introduction of tuition fees in higher education, a move that has been completely transformational for the sector.

In one swift move, studying for a degree became an overt business transaction with a tacit understanding that students had now become customers.

It has had a profound effect on the psyche of both the student and the university in terms of the expectations of former and the aspirations of the latter.

Competition between universities is no longer solely about academic credentials but many more factors, notably the quality of life for the students who will be investing tens of thousands of pounds for this next stage in their educational journey.

A recognition that students who are now paying handsomely for the privilege of a higher education may demand somewhere more salubrious to rest their heads has driven a revolution in the provision of student accommodation, both in terms of scale and offer.

So much so that student accommodation has been one of the hottest property asset classes of the past decade with more than £10bn invested in the UK in the last three years alone, peaking in 2015 at £5.1bn.

Up and down the country, tens of thousands of student beds have been created to meet the growing demand, developed by universities themselves, private developers and student accommodation specialists.

The number of students in purpose built student accommodation (PBSA) has more than doubled in the past decade and while there remain challenges ahead in the sector – from over-supply in some locations to increasing development costs – it remains a sector on an upward curve.

The challenge for universities and developers going forward is to ensure that new student developments are not only financially viable but continue to meet the evolving needs and expectations of their customers.

What is clear is that the classic interpretation of the traditional student





digs – as occupied by the Young Ones in the classic TV comedy – has now been consigned to the history books.

Today’s student body is not only more discerning but much more diverse, with international and post graduates making up around a fifth of all higher education students, and each group brings a different set of demands in terms of their accommodation needs.

However, while each of these three customer groups may have differing requirements around basic fundamentals such as cost, size and privacy, at the heart of the student accommodation equation is something much more difficult to define – the student experience.

Whether it is city centre or campus living, cluster units with shared kitchens and social spaces or individual studio spaces, it is the experiential aspect that will drive

the future PBSA sector – and this will differ from location to location.

Designers must understand the experiential offer that exists between where the student sleeps and when they arrive at their faculty building and tailor the PBSA accordingly - high quality co-living facilities will be an important aspect of out of town campus developments but perhaps less so in vibrant city centres.

The student rooms themselves and how they are constructed will also continue to evolve as technology advances. Just two decades ago a student might need space for a TV, a computer, printer, games console, hi fi and even some books – today they just need a laptop.

Designers are not just looking at the needs of today but predicting the needs of the future, where science fiction as depicted in novels such as Ready

Player One where people are living their lives through virtual reality headsets, increasingly becomes science fact.

We are now at a stage where the designer is increasingly focused on a creating a room that meets the anthropometrics of the student, subject to the experiential customer values relative to location and university typology.

In short, student rooms are getting smaller and so communal, social and study spaces are getting bigger. The designer is focusing on the creative use of storage and seating, a variety of sleeping rooms, better kitchen and dining facilities with a view to ensuring that the end product meets the needs of the ‘health generation’.

The PBSA sector remains one of significant opportunity, but it is not without its challenges for developers with rising construction costs, competing land uses and planning policies all putting a strain on the viability of PBSA

in core locations so innovation in design and construction techniques are all crucial for the future growth in the sector.

Off site or modular construction is becoming increasingly popular across the education sector, offering a more efficient construction process when done well, although increasing demand in other sectors such as hospitality and built to rent is already starting to see capacity issues which in turn will have an impact on the cost and time benefits.

Designers are now looking at the next generation of student accommodation where the boundaries are increasingly blurred between living and learning, future proofed to meet the inevitable changes in technology, innovatively considered to support efficient construction and necessary volumes and most importantly, sufficiently well-designed and equipped to pass the customer value test.

Cowley student village, Oxford, UK

Broadway Malyan was commissioned to create a major new student accommodation facility on the site of a former army barracks in Oxford. The halls of residence for students at Oxford Brooks University will be operated by Unite Students and is the largest single student development in the city.

As well as nearly 900 student beds, the development will also include a range of collaboration spaces, a shop, laundrette and café, all arranged around two quads and a central parade. The development includes a range of building typologies organised in a series of quads in reference to the architectural enclosures found in many of Oxbridge's medieval colleges as well the site's military history.

A series of three-storey clusters around the perimeter of the site will be constructed in red brick to reflect the local vernacular while the quads will be formed by four and five storey clusters in a buff brick that links the development to a remaining barrack building next to the development site

“The design approach for the project has been driven by site's former use as a barracks with the quads having a strong local meaning while also providing an internationally recognised typology that will appeal to foreign students.”

*David Anderson,
Director, Broadway Malyan*





ACS Cobham, Surrey, UK

Broadway Malyan was appointed to design a new boarding house for ACS Schools on their Cobham Campus.

The new building accommodates 113 students in en-suite rooms arranged in two symmetrical wings for boys and girls along with 14 studio rooms for supervisors and a two bedroomed flat for house parents. There are numerous light-filled common rooms with cooking facilities where students can relax and socialise in a relaxing environment which is connected to the surrounding landscape.

The new building – situated within green belt land – is sympathetic to the surrounding woodland. Building levels take advantage of a steep fall in topography from east to west towards the woodland, reducing the overall height of the building.

Slender columns, reminiscent of the trunks of the silver birch trees in the adjoining woodland, support the upper floors. As many of the rooms as possible have window seats that provide views across the woodland.

“The construction of the building was a combination of traditional and modular construction with significant elements of the building built off-site by contractor Caledonian.

“The modular approach also provides a consistent build quality with self-supporting steel units prefabricated in a factory rather than on site and this has the advantage of significantly reducing the build time.”

*Dan Fleming, Project Architect,
Broadway Malyan*

Kensington House, Birmingham, UK

Broadway Malyan was commissioned by Birmingham Properties Group to carry out a feasibility study looking at the conversion of a time-worn 1970's office block into a student residential accommodation.

To meet the strict sound reduction stipulations, the final design incorporates high quality double glazed aluminium windows. These provide high acoustic standards as well as significant thermal insulation and successfully obviate the need for onsite renewable energy sources which were shown to be impractical and costly. High efficiency gas condensing boilers are designed to provide communal space heating and hot water throughout the development.

As well as 126 studio apartments and 6 one-bedroom apartments, the project incorporates common rooms with a kitchenette on each floor, quiet rooms, game rooms, a small cinema and an in-house gym. Secure cycle storage has also been designed for every apartment.





Pillow economy set for **take-off** in Poland



*By Robert Kaminski,
Director,
Broadway Malyan*

The winds of change that have been blowing across Poland for the past 30 years are now starting to be seriously felt in the higher education sector.

Poland has one of the highest number of students per capita anywhere in Europe and over the last two decades, the number of Poles with university degrees has almost tripled.

Poland's historic and celebrated public university system remains the largest higher education provider in the country but private universities are growing exponentially and now make up more than 10 per cent of the market.

Migration away from Poland has slowed considerably and a liberalisation of the education sector generally has seen an increase in the range of subjects on offer as well as a significant increase

in international students, not just from the CEE and former Soviet states but Western Europe, China and the USA.

Indeed, the number of international students totalled 57,000 in 2015, a 24 per cent increase on the previous year and a massive 466% increase in a decade. While still only accounting for 4% of the total student population, it is clear that this remains an area of growth as Poland moves towards the 10% average of countries like France and the UK.

However, while the higher education sector is marching confidently forward academically, the basic infrastructure to support this growth, namely modern and appropriate student accommodation, is still very much lagging in the last century.

There are currently just over two million higher education students in Poland spread across almost 200 institutions concentrated in the seven major centres of Warsaw, Kraków, Poznań, Wrocław, Gdansk, Łódź and Lublin.

However there is a dedicated student accommodation for just 9%, well below levels in more advanced countries such as the UK (24%), the Netherlands (16%), France (15%) and Germany (11%) and occupancy rates in these few student housing schemes range between 95-100% and they are predominantly occupied by international students.

The majority of the existing stock is currently owned by the public universities and the numbers of available beds are actually in decline as low-standard buildings that are no longer fit for purpose are taken out of use.





With another 15 per cent living at home during their studies, that leaves more than three quarters of the student population – or roughly 1.5 million students – looking to the private market for their accommodation.

Shared houses remain the key accommodation type for students but while they are cheap, there is limited availability and the standard of the accommodation is poor. Students also have the opportunity to rent private apartments but these are often unobtainable due to the high costs.

As Poland becomes more affluent and internationalist in its outlook and culture, so there is now a growing demand for better accommodation on or near university campuses that is not just affordable but also enhances the overall university experience. In short, there is a clear demand but very little supply.

Poland is increasingly becoming a hub for international investment with attractively priced assets across a range of sectors and funds are now beginning to see the opportunity in student accommodation as yields are compressed in more traditional sectors.

The first student investment in Poland was the acquisition of two student developments in Lublin totalling more than 300 beds by Griffin Real Estate and developers such as Golub GetHouse, Triton Academicus and Budner (under the brand name Dwell Well) are all now taking much more interest in the market.

In fact the reality is that investors have long seen the opportunity in the market but the universities have traditionally neither had the money or in many cases the desire to support the development of purpose built student accommodation on the kind of scale that would pique the interest of the major funds.

But as higher education has continued to evolve with the influx of more foreign students and a greater spending power by students generally, so universities are increasingly accepting that policies that may have served them well for the past six centuries may need to be updated in this increasingly competitive landscape.

While the UK and US dominate with more than

90% of the global investment in the sector, there is a growing demand for new product in Poland and with potential for net yields of 5-7%, there is a unique opportunity for early entrants into this fledgling market.

Poland can boast a world-class academic pedigree that attracts some of the brightest minds from around the world and universities must now provide facilities at the same level as international students could expect elsewhere.

The growth of private universities and their improving reputation means they are bringing opportunities to students who are unable to access public universities and while they are more expensive, they offer a more flexible approach to education and as such must offer more modern and appropriate facilities for students.

Public universities remain the academic heartbeat of Poland and are the country's reservoir of knowledge and research but private universities have ambitions to evolve into more learned institutions and their continued growth will also be a significant opportunity in the purpose built student accommodation sector.

We are now seeing funds looking at single investments in the sector and universities increasingly accepting that working with developers to provide accommodation that promote and support community life experiences for students adds significant value to their offer.

While students undoubtedly have more spending power, there remains a huge differential in terms of rents between cities such as Warsaw and Gdansk and as such, creating innovatively designed products will underpin the sector, as will embracing the latest in efficient construction techniques such as off-site and modular.

It has taken several years for the stars to align but the opportunity is real, you can feel it in the wind.

Leon Koźmiński Academy of Entrepreneurship and Management, Warsaw, Poland

Broadway Malyan created a concept for a new boarding house on the campus of the Leon Koźmiński Academy, one of Poland's leading private universities.

The aim of the building was to create an aesthetically exciting addition to the campus that provided student accommodation as well as a range of shared facilities, promoting the university's values of openness, teamwork, practicality and leadership.

As well as the residential function, the scheme was developed to enhance student integration through different initiatives to encourage collaboration in work and rest, integrated with the surrounding environment through an active public realm and strong green elements.

The building consisted of two key elements with a main building that housed the student rooms and infrastructure around a central courtyard and then a continuous wood-finished 'ribbon' that enveloped the building which provided a range of functions including a half-pipe, tennis court, climbing wall and roof terraces.

The building was orientated to the south west to maximise sunlight while the courtyard was connected through glazing with a double height reception and a range of ground floor functions including a café, fitness club and TV room.





Jagellonian University, Krakow, Poland

Broadway Malyan was commissioned by Bouygues to transform three existing 1970s towers after winning a Public Private Partnership competition organised by Collegium Medicum of Jagellonian University in Krakow.

The budget project saw the complete refurbishment of the three towers to deliver 1,000 student beds within a range of one and two-bedroom apartments with vastly improved common areas.

These included a new gym, lounges, study rooms and spacious kitchens with food lockers, one of a range of innovations aimed at improving the space quality within the bedrooms. There was also a new auditoria located on the ground floor.

The refurbishment programme also saw the creation of a number of smaller ground floor apartments for rent to visiting professors and guests of the students.

The external façade was also replaced with an abstract pattern that formed a pixelated A, B and C to represent the names of each of the blocks while each block was individually colour-coded.