AUDE
ASSOCIATION OF UNIVERSITY DIRECTORS OF ESTATES
Excellence in Estates and Facilities

Estates: The Foundations of Higher Education
Higher Education Estate Statistics 2011/2012

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The Association of University Directors of Estates (AUDE) is the membership organisation for university estates and facilities. AUDE supports estates professionals in providing best value, a high quality student and staff experience and to ensure estates are run in a professional, innovative, efficient and effective manner.

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Thank you to University of Manchester, University of Bristol and Oxford Brookes for providing photography for this report.

Introduction

Welcome to this report on Higher Education Statistics data for 2011 and 2012.

The data is collected annually and submitted to the Higher Education Statistics Agency, providing high quality benchmarking statistics critical to good estate management.

This report, produced by the Association of University Directors of Estates (AUDE) sets this data within the context of the preceding 10 years and provides evidence of good practice, as well as highlighting some of the challenges from both the last 5 years and for the next 5 years.

We hope that you find this format useful and informative, with an executive summary, as well as relevant detail for each section. At this time of significant change in higher education it is interesting to note that sector quality and our approach to carbon management confirms that overall our estates are improving, whilst investment and operational costs are being maintained.

We recognise that this report works with data that is a summary of the whole sector. As such it highlights how the sector is facing the challenges. We believe that this articulates the type of performance indicators that individual institutions may wish to use to compare themselves with an appropriate peer group. This will help identify areas of good practice which can be shared.

As Directors of Estates we need to use detailed information to improve the management of own estates, whilst looking to colleagues to continue to share best practice. We trust this report will support you in the on-going challenges we all face.

AUDE Executive
October 2013

EXECUTIVE SUMMARY

1.0 The University sector had seen a period of sustained growth in income of circa 10% per annum up to academic year 2007/08. Since then the year on year increase has reduced considerably with an increase from 2010/11 to 2011/12 of only 1% (which is a reduction in real terms). The size of the sector is anticipated to remain constant in the short to medium term.

1.1 This is predominately driven by the number of home undergraduates across the sector. Whilst there will be variations in numbers between institutions (and there is the potential for growth in overseas students) there is unlikely to be any significant growth in home undergraduates.

1.2 Property costs rose substantially up to 2008/09, but since then they have remained relatively stable year on year, and remain at that level in 2011/12. There are a number of factors influencing this, but it is clear that there must have been a good general approach across the sector to cost management to ensure that costs remained level.

1.3 Capital spend reduced substantially between 2010/11 and 2011/12. This was anticipated, but the reduction was not as sizeable as predicted. The reasons for this could be due to one, or all, of the following:

- **a** Institutions recognise the need to continue to invest in providing the right environment to attract students.
- **b** Capital programmes can be complex and have time horizons of 3 to 5 years, and cannot easily be stopped once started.
- **c** Some institutions are reducing their capital spend, but individual projects are still in the pipeline and the total effect has not yet been fully felt.
- **d** Other institutions also may see this as a good time to continue to invest in their estate and are coping with the reduction in capital available from Government by seeking other sources of funding, including increased borrowing (reckoning that debt can be obtained at favourable rates).

1.4 Within property costs, institutions have demonstrated effective cost management, evidenced by the way costs have been held at the same level as in 2008/09.

1.5 The total spent on property has remained at 6% – 7% of income since 2001. This is despite substantial increases in energy costs.

1.6 Energy use has remained constant. This is likely to be the result of effective sustainability programmes aimed at energy reduction, coupled with an otherwise inexorable increase in demand for energy.

1.7 The income generated per m^2 within the sector has continued to grow. Across the whole estate it has reached £1,600per m^2. Further analysis of this KPI shows that teaching income generated by teaching space has increased faster than research income generated by research space.

THE SECTOR

2.0 Income growth in the sector has reduced steadily in the last 4 years, and now stands at only 1% growth, representing a real reduction in income. Prior to this, the sector was accustomed to a period of sustained growth of approximately 10% per annum. Income has barely increased from 2010/11 to 2011/12 and projections are that income will remain flat for 2012/13 as well.

2.1 Taught student Full Time Equivalents (FTE) numbers have increased steadily over the period. Whether this trend continues cannot be predicted from these statistics. However Staff numbers and research student numbers have both dropped in the last year, after a sustained increase over previous years. Staff FTE have dropped from a high of 309,572 (2009/10) to 294,234 (2011/12). Research student FTEs reached a high of 87,094 (2010/11), falling to 84,664 in 2011/12.

2.2 Future student numbers are a matter for some debate; it is unlikely to increase overall. Some institutions are becoming more successful at recruiting than others, meaning that for a significant number of institutions, undergraduate numbers are likely to be down, impacting considerably on income.

2.3 Clearly a reduction in research income will only affect those institutions where research forms a significant % of their income.

2.4 Whilst capital spend last year was down on 2010/11, there is clear evidence that institutions are continuing to spend. One reason could be their recognition of the need to invest in their facilities, but also because their capital programmes are often complicated and typically have 5 year time horizons.

2.5 The continued expenditure of capital is likely to result in an increase in the amount of space that institutions occupy. Some capital is being used for refurbishment, but about 50% relates to new build space, as seen in Fig. 6. Without equivalent disposals, institutions will see their property costs increasing as a result of this additional space.

2.6 It is anticipated that capital may be utilised for space refurbishment rather than new build in coming years. This should help to reduce property costs, improve condition, and improve suitability without increasing the total estate.

2.7 Total income in the sector is in excess of £25 billion;

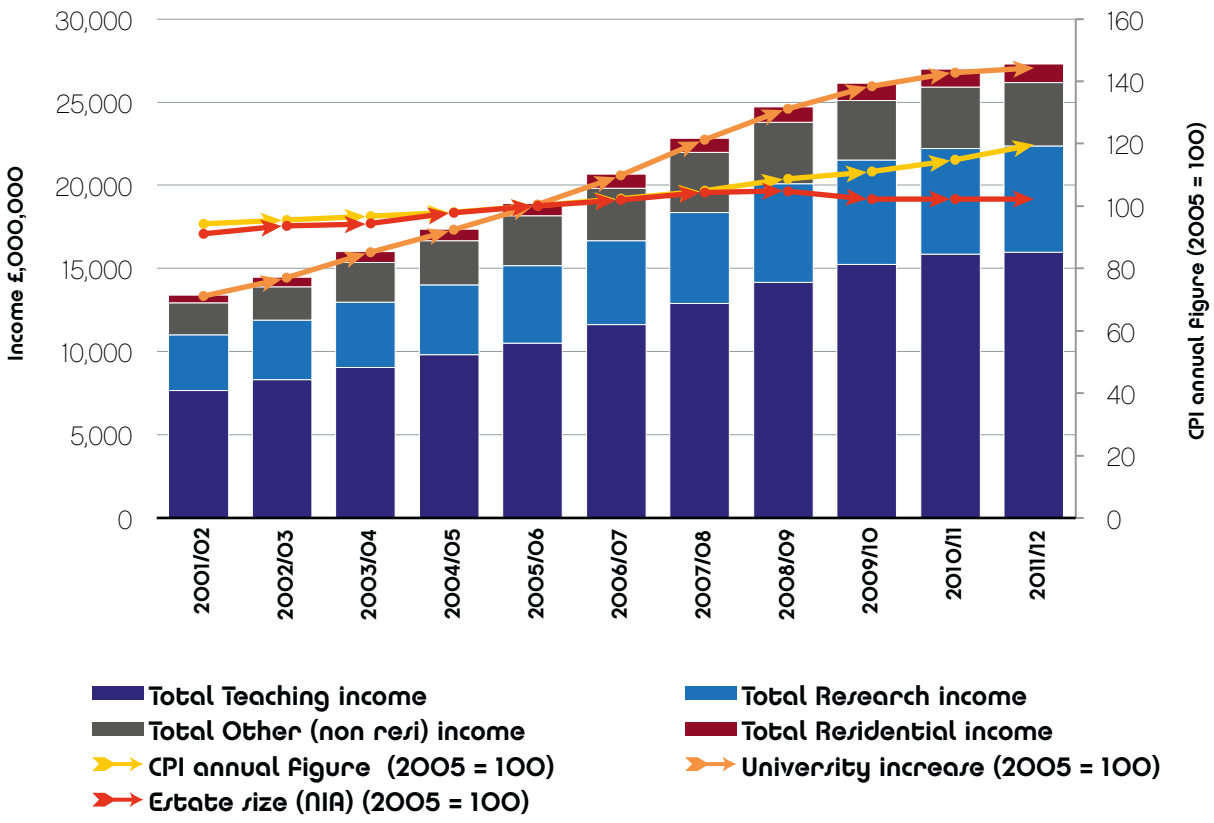
- **a** £16.0bn from teaching income.
- **b** £6.5bn from research.
- **c** £4.9bn from other and residential income.

2.8 Increase in income has substantially outpaced the increase in the Consumer Price Index, showing that the sector itself has been growing in size.

2.9 The rate of increase stood at circa 10% for the years 2001/02 until 2007/08, and has been steadily decreasing to around 1% between 2010/11 and 2011/12. This represents a 'real' reduction in income.

2.10 Annual increase in income now is almost zero, and projections are that this is likely to continue in this way. Whilst some individual institutions may seek to grow their income (by additional home or overseas students) the total size of the sector is likely to remain static at least in the short term. It is unlikely that the cap on tuition fees of £9,000 will be increased in the short term, and there is no mechanism to allow for any increase due to inflation.

Figure 1. Growth in sector, showing income, estate size and CPI



STUDENT NUMBERS

TOTAL TAUGHT STUDENTS, RESEARCH STUDENTS AND STAFF FTES 2001/02 TO 2011/12

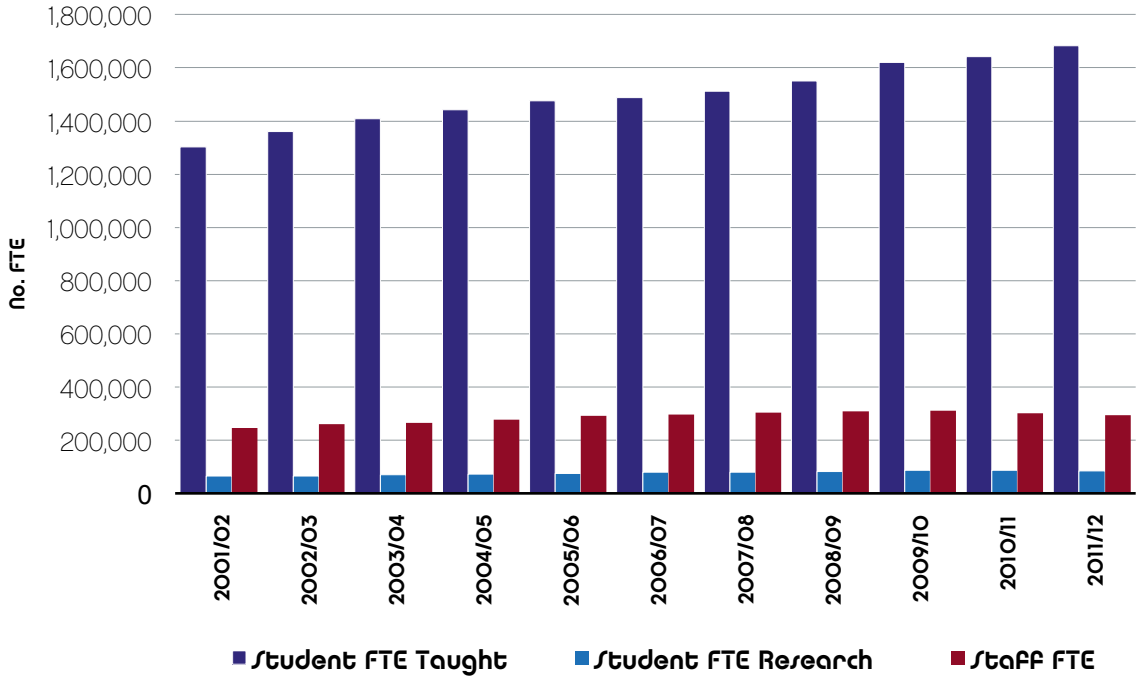
2.11 The number of people within the sector has grown significantly over the last decade, however the last 2 years have seen reduction in both staff and research numbers.

- **a** Taught FTE students up from 1.30 million to 1.68 million.
- **b** Research FTE students up from 66,000 to 84,000, but has reduced since a peak in 2010/11.
- **c** Staff FTE numbers up from 244,000 to 294,000, but has been reducing since a peak in 2009/10.

2.12 The past increase in undergraduate numbers is unlikely to continue into the future.

2.13 There is much greater volatility and uncertainty over student numbers, challenges to planning for some institutions, along with a lack of certainty over income.

Figure 2 Total Full Time Equivalent, Students (Taught and Research), and Staff



PERCENTAGE GROWTH IN STAFF AND STUDENT NUMBERS: 2 YEAR WEIGHTED MEAN

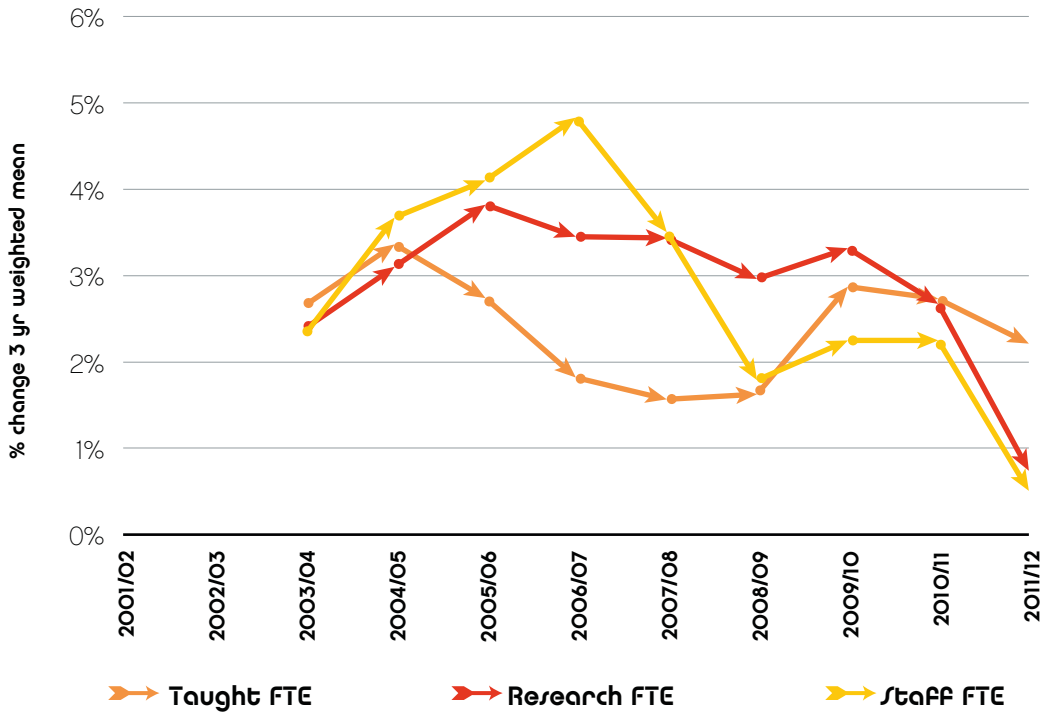
2.14 Taught FTE numbers have been on a sustained increase, with typical mean (3 year weighted) of between 1% and 3%.

2.15 There is substantial uncertainty in the projected number of students for the next few years.

2.16 Home undergraduate numbers, which make up the majority of income, are likely to remain fixed in total number, but the share between institutions will change as some are successfully increasing their numbers.

2.17 Home undergraduate numbers, which make up the majority of income, are likely to remain fixed in total number, but the share between institutions will change as some are successfully increasing their numbers.

Figure 3. Percentage growth in FTE numbers (staff and students) 3 year weighted mean



TOTAL PROPERTY COSTS

2.18 Since 2008/09 Total Property Costs have been static, despite substantial upward pressure. This has come from;

- **a** Continued increase in GIA.
- **b** Continued (albeit smaller) increase in income in the sector.
- **c** Increasing costs, particularly energy and imported materials.
- **d** Space with more complex facilities such as IT and cooling, and greater utilisation of that space.

2.19 Total expenditure increased steadily from 01/02 to 09/10, from £726m pa to £1,610m pa.

2.20 Expenditure has remained relatively stable at £1,610m per annum for the last three years, despite increases in costs.

2.21 The most significant costs are:

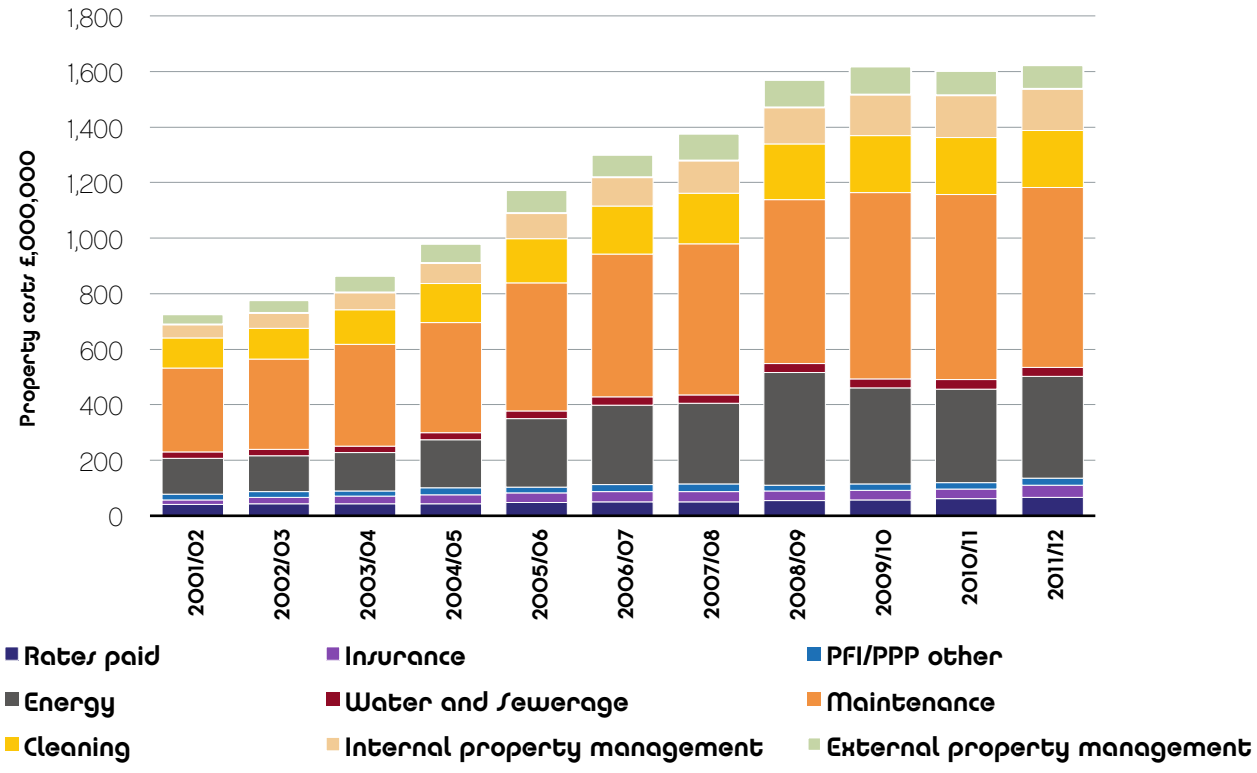
- **a** Energy.
- **b** Maintenance.

2.22 Approximate proportions of expenditure have remained relatively stable since 2001/02. Utility costs have increased from 18% to 23% of expenditure.

2.23 Substantial budgetary restraint has been employed to curb spending. This could have an impact upon the ongoing condition of the estate if expenditure is insufficient.

2.24 Significant amount of costs are difficult to control and dependent upon drivers outside the institution's control (such as energy and water/sewerage, rating, insurance, and other external charges such as rent). This means that other areas must be controlled to exert an influence on total property costs.

Figure 4. Total Property costs



TOTAL CAPITAL EXPENDITURE: ACADEMIC SPACE, NEW BUILD AND OTHER WORKS 2001/02 TO 2011/12

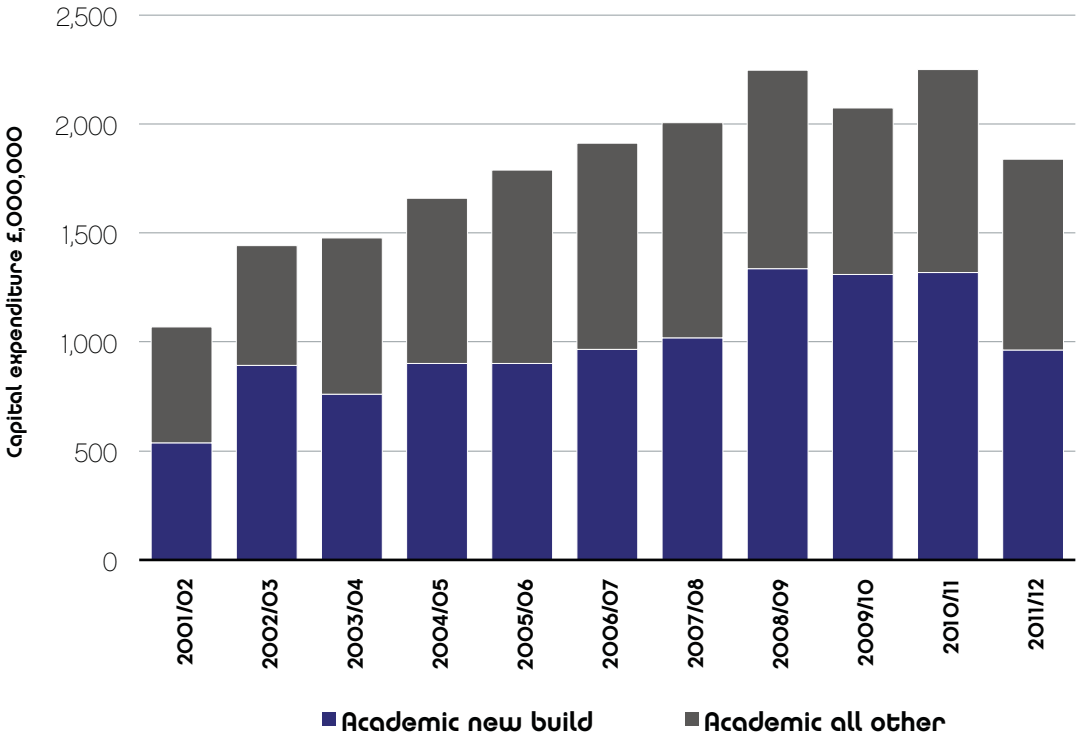
2.25 Capital expenditure last year (2011/12) is down to £1,840m per annum from the previous level of £2,250m for 2010/11.

2.26 Capital expenditure is likely to continue to decrease, however:

- **a** Construction projects tend to take a lot of planning and last for a number of years and will take some time to come to fruition.
- **b** A number of large institutions have major capital plans spanning a number of years; typically around 3 to 5 year programmes.
- **c** There is recognition of the need for institutions to invest in the student/staff experience and improve the quality of the built environment in order to remain competitive.
- **d** There is less available capital available from the government.
- **e** Experience and knowledge suggests that institutions are continuing to find other sources of capital to invest including increased borrowing.

2.27 The split between new-build and other works remains relatively constant at approximately 50%, as shown in Fig. 5. It is possible that institutions may seek to refurbish existing accommodation rather than build new, hence the figures may change.

Figure 5. Total Capital Expenditure



PROPERTY COSTS

3.0 Universities have managed to control the growth in estate costs very well. In essence the costs have remained flat for the last four years, despite significant inflationary pressures and increasing amounts of estate (m^2).

3.1 This reduction in expenditure needs to be firmly tested. Estate costs can be considered in two different parts:

- **a** Structural costs: These are costs that are directly proportional to size of estate and on which there is very limited, if any, flexibility. These include rates, insurance, and certain parts of maintenance (such as statutory testing) as well as to a greater extent, energy (you have to heat the space).
- **b** Variable costs: These are costs over which there is some control, and include other aspects of maintenance (such as routine) and cleaning, as well as internal and external management costs.

3.2 Structural costs are dependent on external factors and management influence is limited, and hence any flexibility in expenditure must be met from the variable costs which typically include cleaning and part of the maintenance budget.

3.3 The new buildings that will be coming on stream will make demands on estate expenditure and this in an environment where income is likely to remain flat for a number of years.

TOTAL PROPERTY COSTS PER M² (GIA)

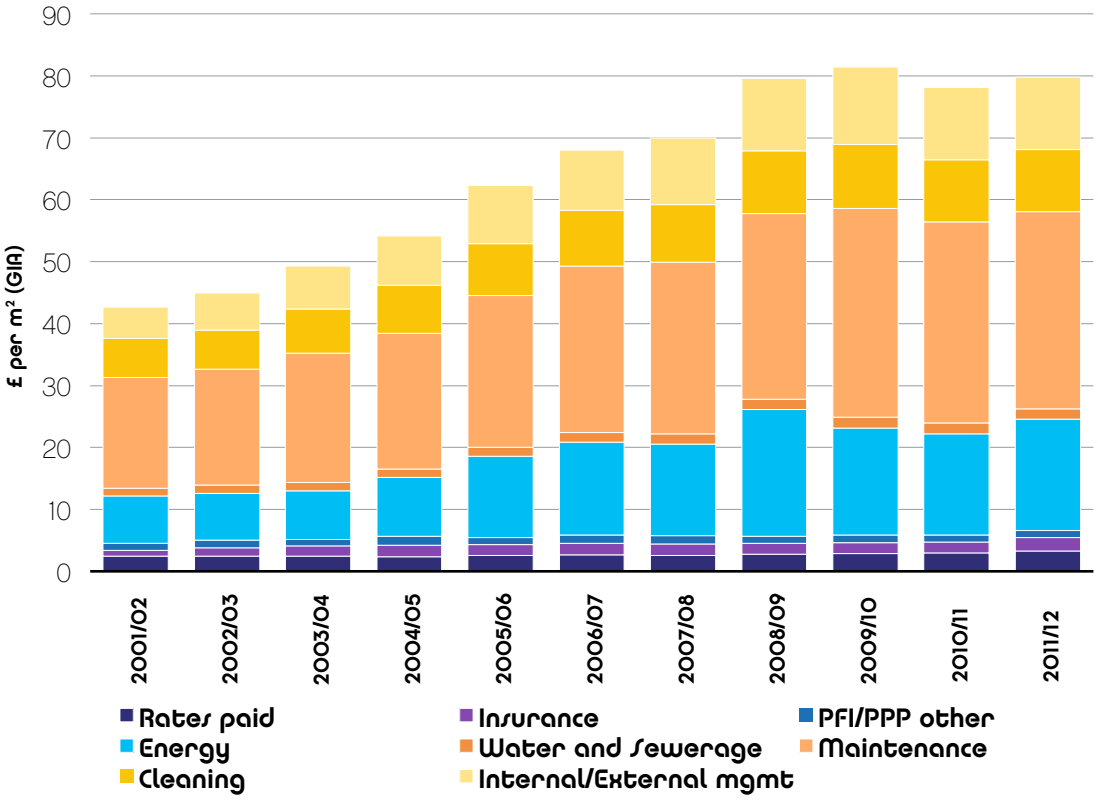
3.4 Total property costs £ per m² have been held relatively stable for the last 4 years. This is despite substantial upward pressure including:

- **a** Increase in energy costs, which now form a larger percentage of total costs.
- **b** More complex space requiring more routine maintenance.

3.5 Increasing the utilisation of space inevitably increases the pressure on costs, for example, the need to extend heating hours and increased demand on maintenance.

3.6 Part of the increase in costs could be attributed to a particularly cold winder in 08/09. Energy costs are very dependent on the weather, both cold winters and hot summers.

Figure 6. Total Property Costs per m² GIA



CHANGES IN PROPERTY COST EXPENDITURE 2001/02 TO 2011/12

3.7 The most significant change in proportion of Total Property Costs (TPC) is the increase in energy costs from 18% of TPC to 23%. This is likely to be a combination of increasing utility costs, as well as potentially increasing complexity of estate.

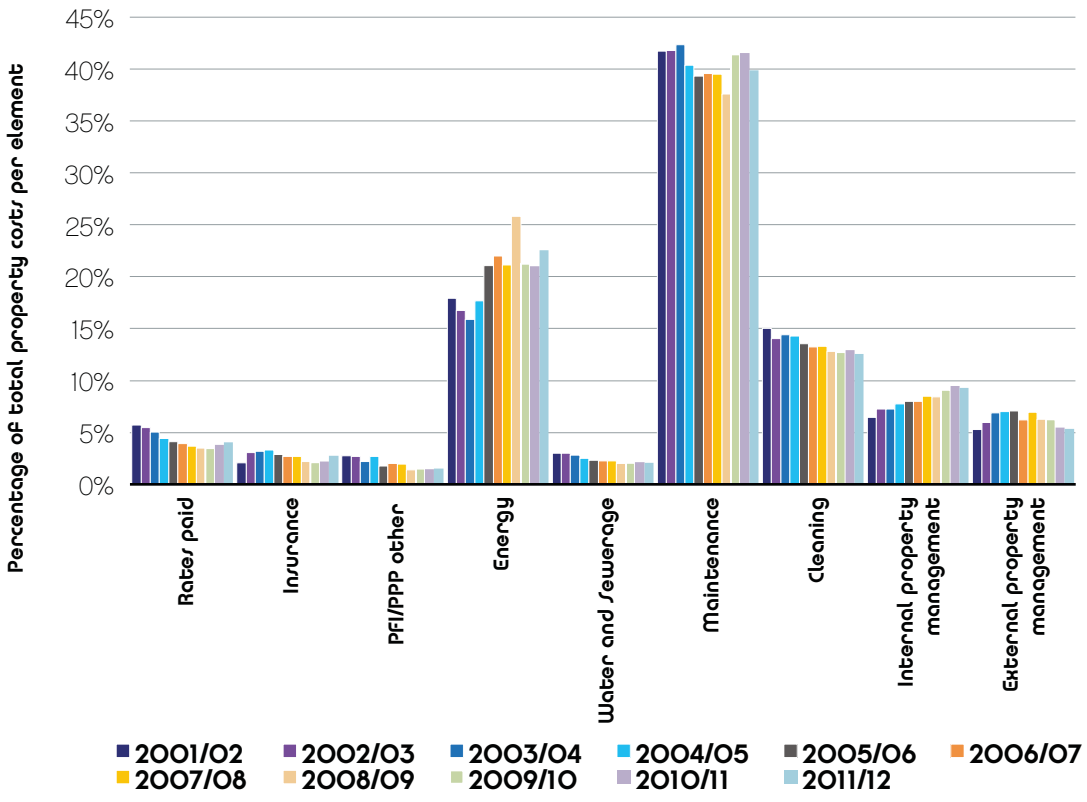
3.8 Internal property management costs have increased from 6 to 9%.

3.9 As a result, the majority of other costs have reduced as a percentage in the last decade.

3.10 Property costs had been increasing steadily until 2007/8 by 20% year on year which may have been a reflection of the condition of the estate as well as increasing prices.

2009/10 to the current year has shown a low or nil increase in TPC year on year (with 2008/09 being exceptional due to a spike in energy costs).

Figure 7. Property Cost Expenditure 2001/02 to 2011/12



INCOME PER M² AND TPC PER M².

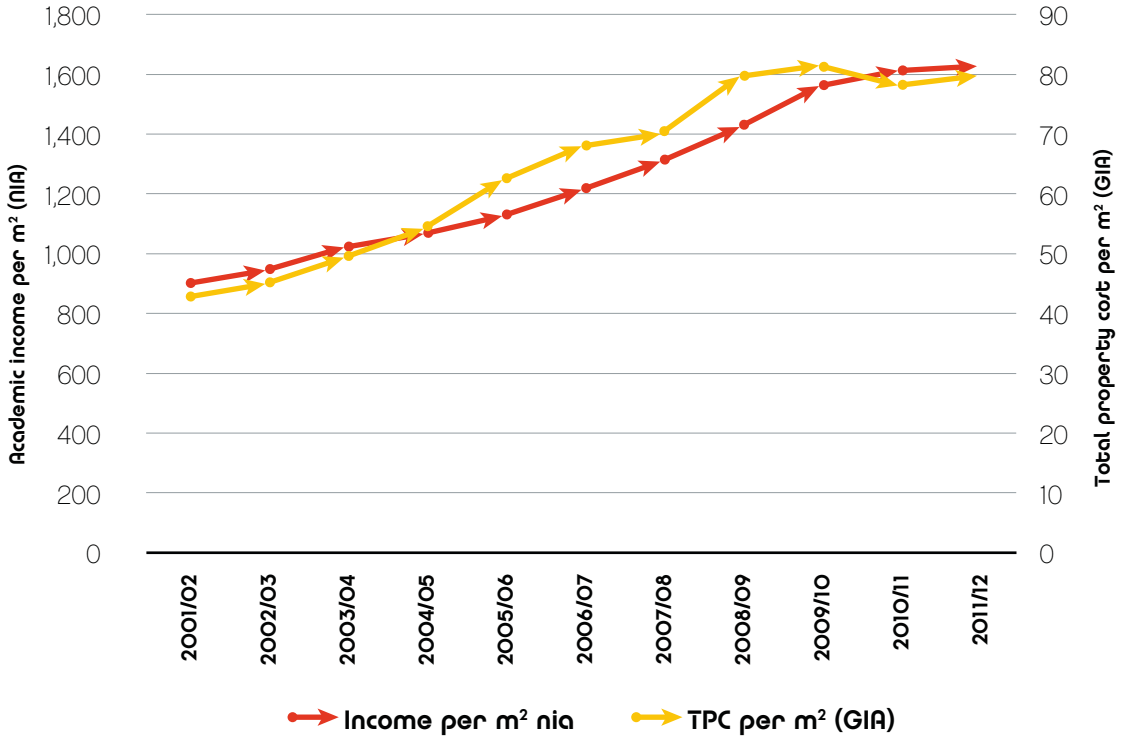
3.11 Income per m² is a key performance measure within the sector, which institutions are encouraged to measure and report.

3.12 The income generated per m² has increased steadily from ≈ £900/m² to ≈ £1,600/m², and at the same time TPC has increased from ≈ £40/m² to ≈ £80/m².

3.13 The last two years (2010/11 and 2011/12) have seen a modest increase in this indicator, whereas the last 10 years has typically seen a greater year on year increase.

3.14 Total property cost as a percentage of total income has remained relatively stable at between 6% and 7% for the last 10 years. The cost of maintaining property still takes the same proportion of income, despite the increases in property costs.

Figure 8. Income per m² and TPC per m²



Note. Income is measured against net internal area as income is a function of net area. Total Property Costs have been measured against gross internal area, as property costs are a function of the gross area.

SPACE ANALYSIS

4.0 The analysis suggests that it is appropriate to separate universities according to their research activity in order to understand the relationship between space and FTEs:

- **a** For institutions with little research activity, where research income is less than 20% of total income, there is an average of 4.9m^2 (NIA) per FTE (staff and students added).
- **b** For institutions where research income is greater than 20%, there is an average of 9.0m^2 (NIA) per FTE (staff and students added).

4.1 This suggests that there is a substantial difference in spatial requirements between these types of institutions which deserves further analysis; that the two types of institution cannot be compared in spatial terms in the same groupings.

4.2 Office accommodation has typically been a contentious issue in the sector, with the need for individual offices being regularly challenged. The analysis of space suggests that little change has taken place in terms of the amount of office space per FTE, even between academic and administrative staff. This should be further investigated as there is at least anecdotal and experiential evidence to suggest that at least administrative offices have seen a substantial increase in more flexible forms of working (such as open plan offices), but yet the average has remained high at 14m^2 per FTE.

4.3 Note also that the University means of calculating office accommodation only includes office space, whereas the private sector would focus on net lettable, which includes meeting rooms and circulation. Other government figures (such as the guidelines for Government's relevant office estate) include within their classification of offices space such as meeting and communal facilities. See 'State of the Estate 2012'. It should be noted that the Government estate achieves an average space of 13m^2 per FTE across the relevant estate, although it has a target figure of 8.5m^2 per FTE.

4.4 Teaching space generates an average income of £3,300per m^2, whereas Research space generates an income of £2,200 per m^2. This does not include any attribution of support space. There has been a continued improvement of the utilisation of teaching space over the last 10 years.

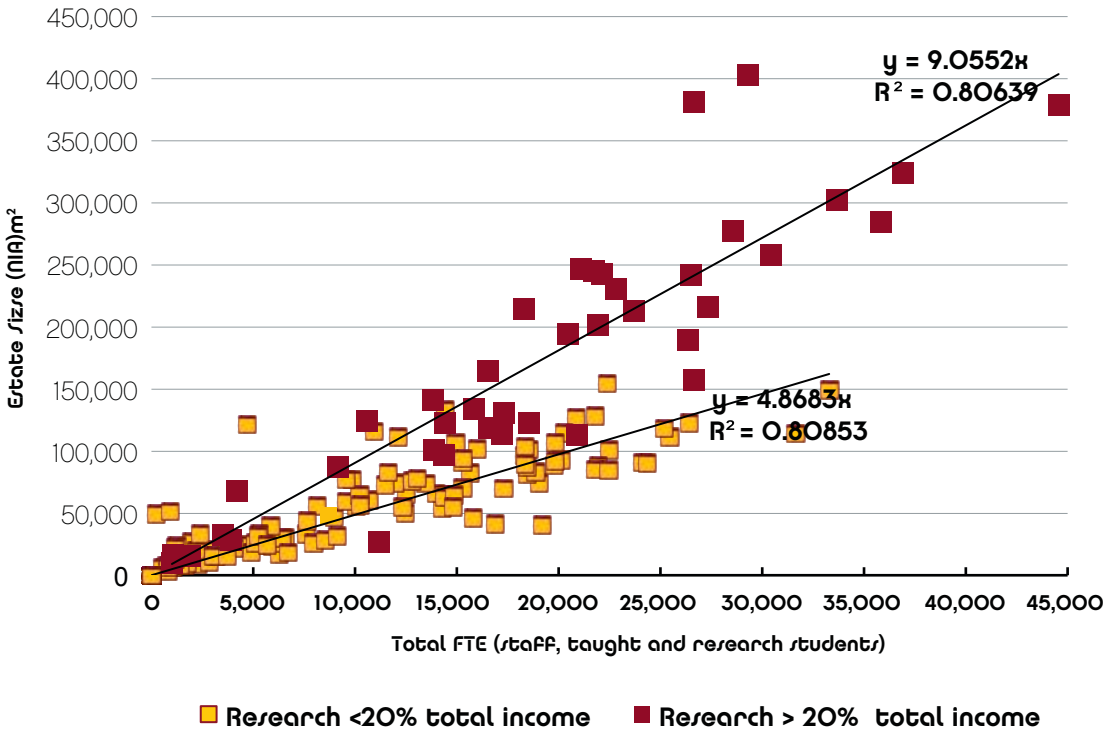
Size of estate vs total FTEs: staff and students (all institutions)

4.5 There is correlation between the size of the estate and the FTEs; the more people, the more space is needed. However the correlation has other influencing factors (including the % research activity).

4.6 Institutions with a higher research activity (i.e. predominently teaching research income is greater than 20% of total income) have on average 9m^2 of estate per FTE (staff and student), whereas institutions with a lower research activity (i.e. predominantly teaching institutions) have an average of 4.9m^2 per FTE (staff and students)

4.7 From this chart, it would suggest that it is appropriate to differentiate between research intensive institutions when undertaking space analysis by staff and student numbers.

Figure 9. Size of estate (NIA) against FTE (staff , taught and research students) with institutions separated by research activity as % of total income

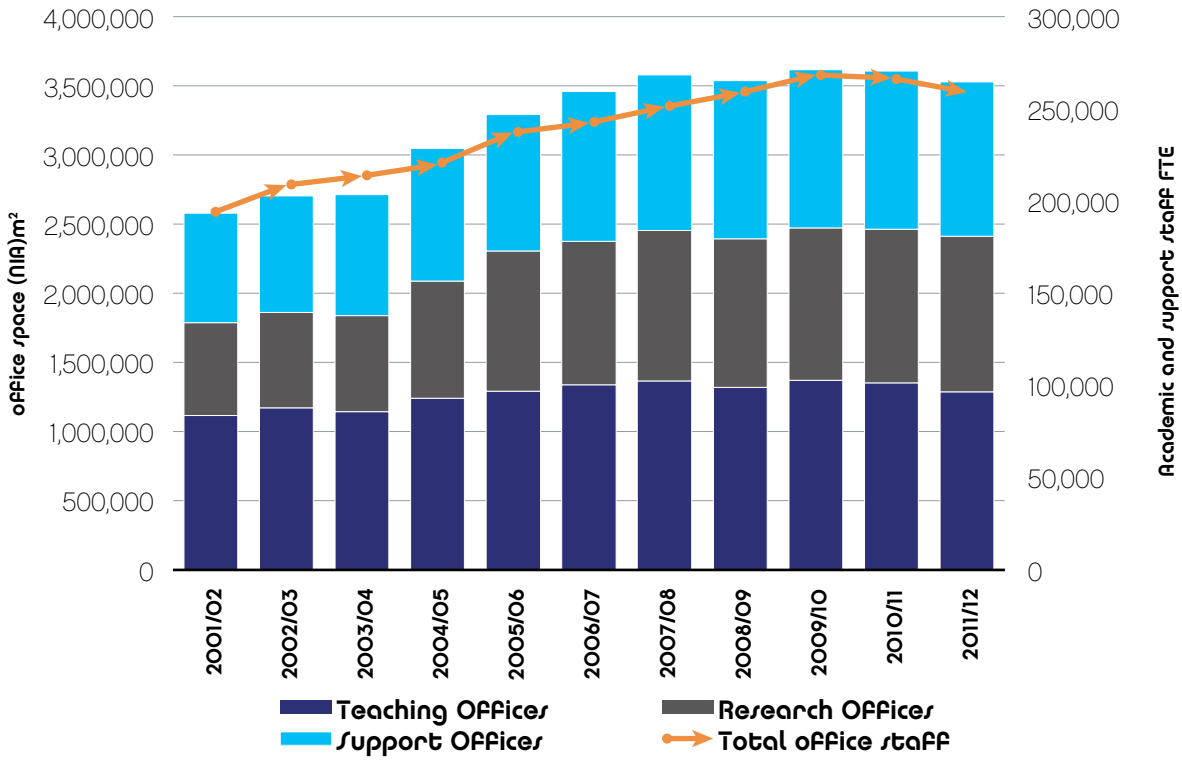


4.8 There has been a significant increase in both office based staff, and office space over the last 10 years although in the last 2 years staff numbers and office space have reduced.

4.9 The amount of office space per FTE (office based staff) has remained relatively constant over the period.

4.10 Support offices equate to a third of the total office accommodation.

Figure 10. Office space provision by type of office (i.e. teaching, research and support) with the number of office based staff FTE shown

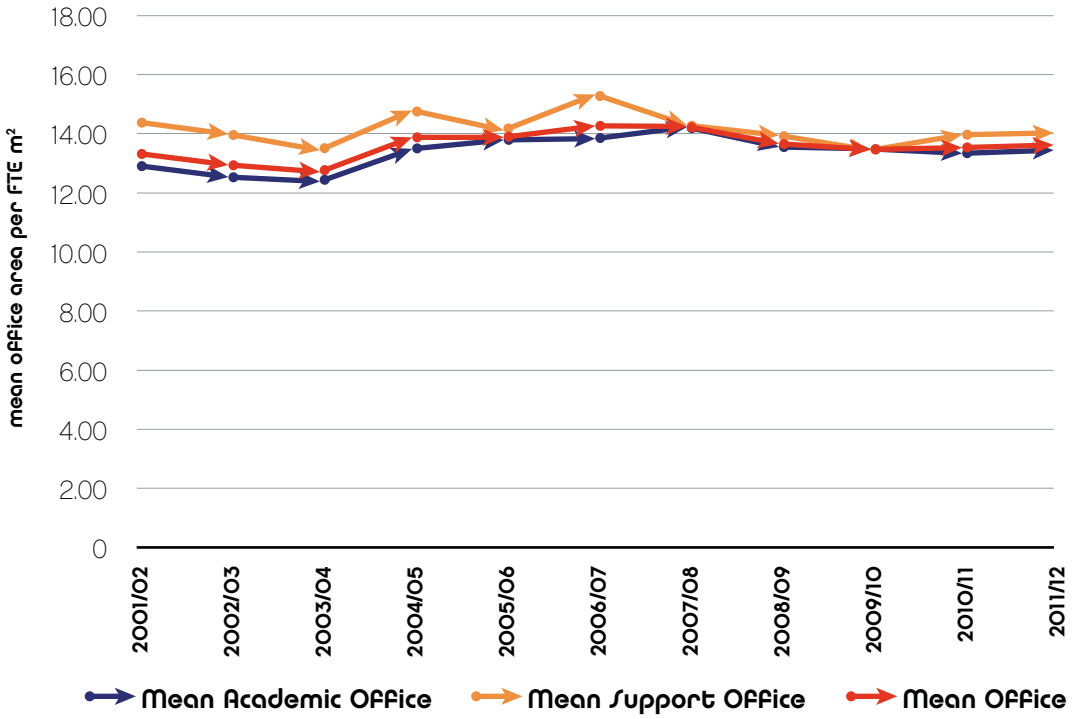


AVERAGE OFFICE SPACE PER STAFF FTE

4.11 Average office space per office based FTE has remained relatively constant over the last 10 years.

4.12 There is little difference between office accommodation provision for academic and support staff.

Figure 11. Average office space per staff FTE



TEACHING AND RESEARCH INCOME PER M²

4.13 Teaching space generates greater income per m² than research space per m².

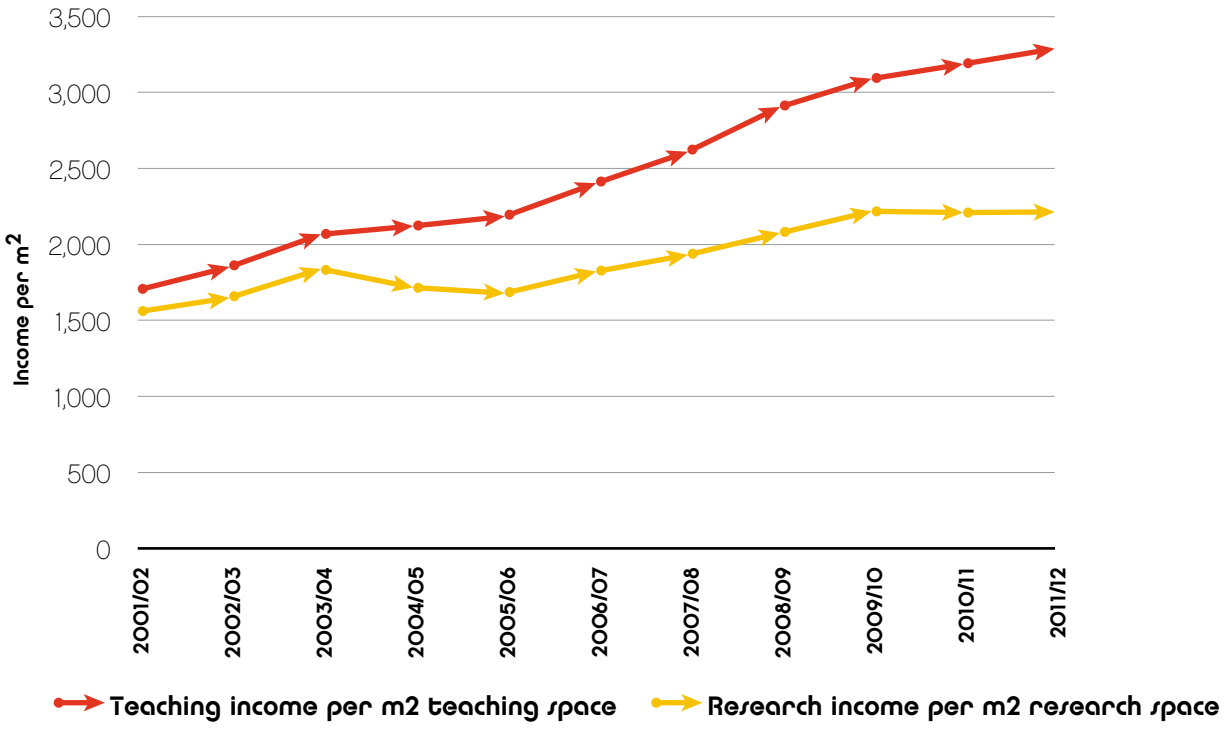
4.14 Furthermore, teaching income per m² has doubled over the period, whereas research income has only increased by a third over the same period, and has remained static over the last three years.

4.15 Further aspects for consideration are whether this income model is typical across different types of institution.

4.16 Support space has not been factored into this chart. It is difficult to effectively attribute support space between teaching and research activity which would be necessary to fairly reflect it in these figures.

4.17 There is potentially a significant difference between the capital cost of construction of teaching space and research space. This will have an impact on return on capital employed.

Figure 12. Income per m² for both teaching and research activity, 2001/02 to 2011/12



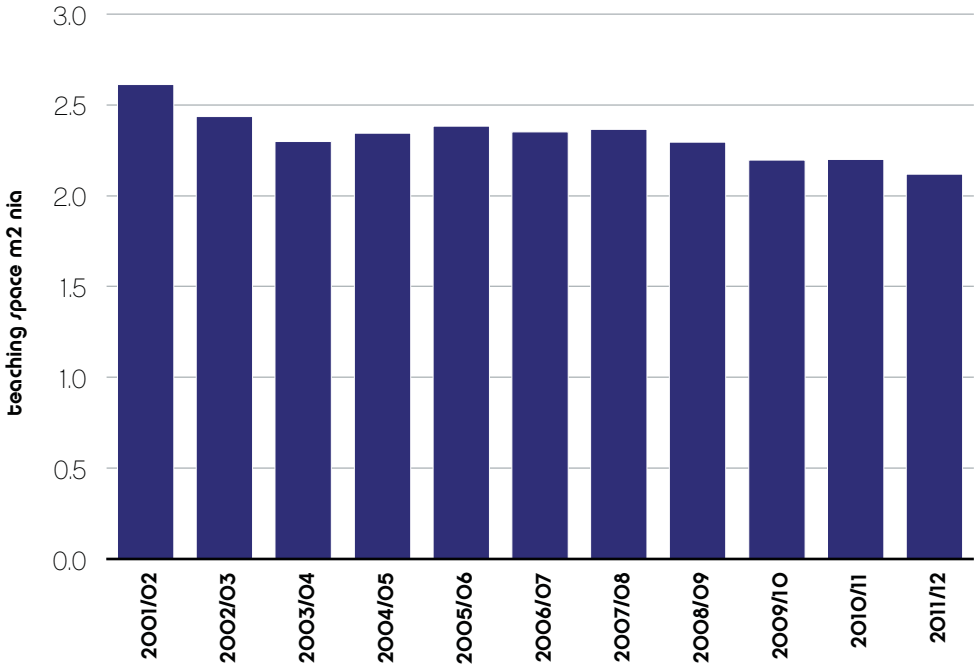
TEACHING SPACE PER TAUGHT FTE

4.18 A slight decrease in the area per student provided for teaching has occurred over the last 10 years. This suggests that existing teaching space is better utilised given the increase in taught FTE numbers.

4.19 A likely explanation is better management of the space over the period, with for example:

- **a** Better timetabling/scheduling of rooms.
- **b** Greater flexibility of provision.

Figure 13. Teaching space per Taught FTE 2001/02 to 2011/12



ENERGY AND EMISSIONS

5.0 Analysis of the data suggests that there is a very close correlation between energy consumption (kWh), cost, and carbon emissions. In order to simplify analysis it is appropriate to examine energy consumption.

5.1 Energy consumption per m^2 has remained relatively static over the past 10 years. There are a number of factors that have affected energy consumption including:

- **a** New buildings are likely to be more energy intensive than old ones. This is due to higher provision of comfort cooling, for example, and greater expectation of a more controlled environment, as well as greater servicing on the space.
- **b** Recent winters have been colder than in other years.
- **c** The utilisation of the estate appears to have increased.

5.2 Universities have been very active with the implementation of sustainability schemes with the aim of reducing energy consumption. This perhaps explains why energy use has remained constant despite upward pressures on use.

5.3 The lack of consumption data split by type of estate (academic versus residential) means that it is not possible to determine any other factors that may have reduced consumption/emissions, such as a move to ensure all heating is by gas rather than electricity, or other fuel switching.

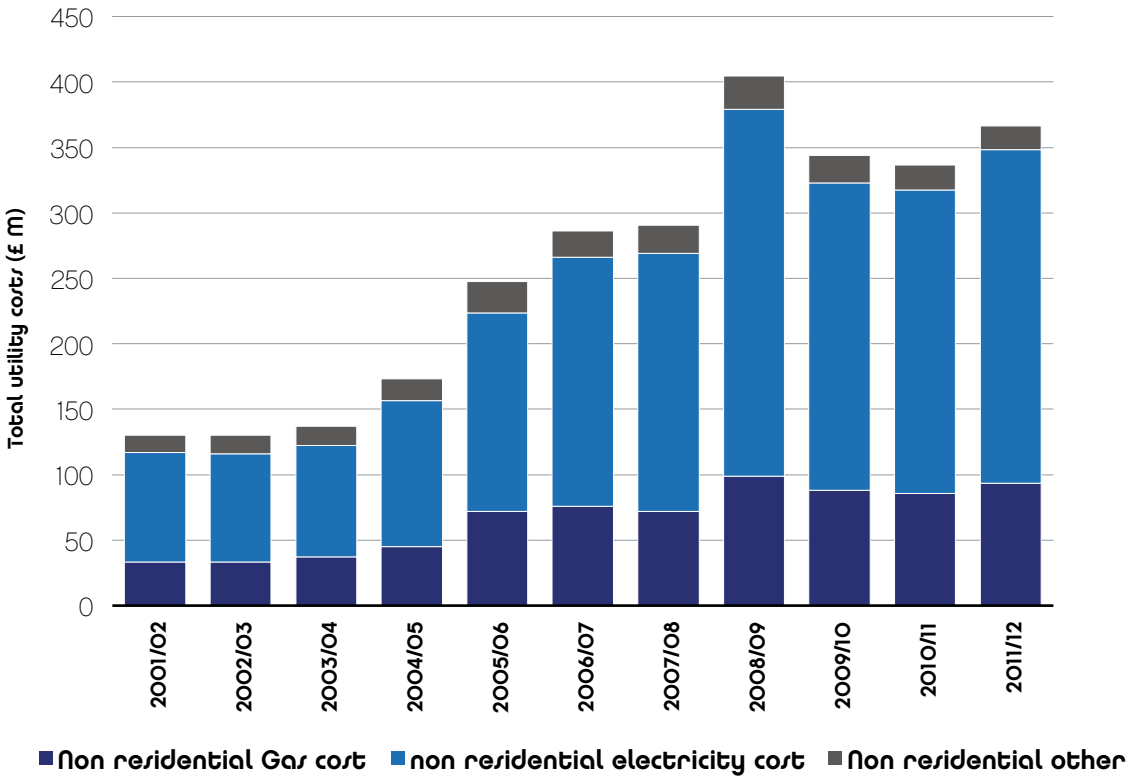
5.4 Gas is typically used for heating generation and is therefore more closely related to temperature and degree days.

5.5 Electricity is less connected to the temperature, although increased use of comfort cooling is likely to raise consumption during hot summers.

5.6 There is no breakdown by consumption available for different types of energy source.

5.7 In general, the cost of energy has been increasing. The increase in estate and the vagaries of the weather will account for the variability of the amount and the general upward trend.

Figure 14. Total energy costs 2001/02 to 2011/12, split between gas, electricity and other

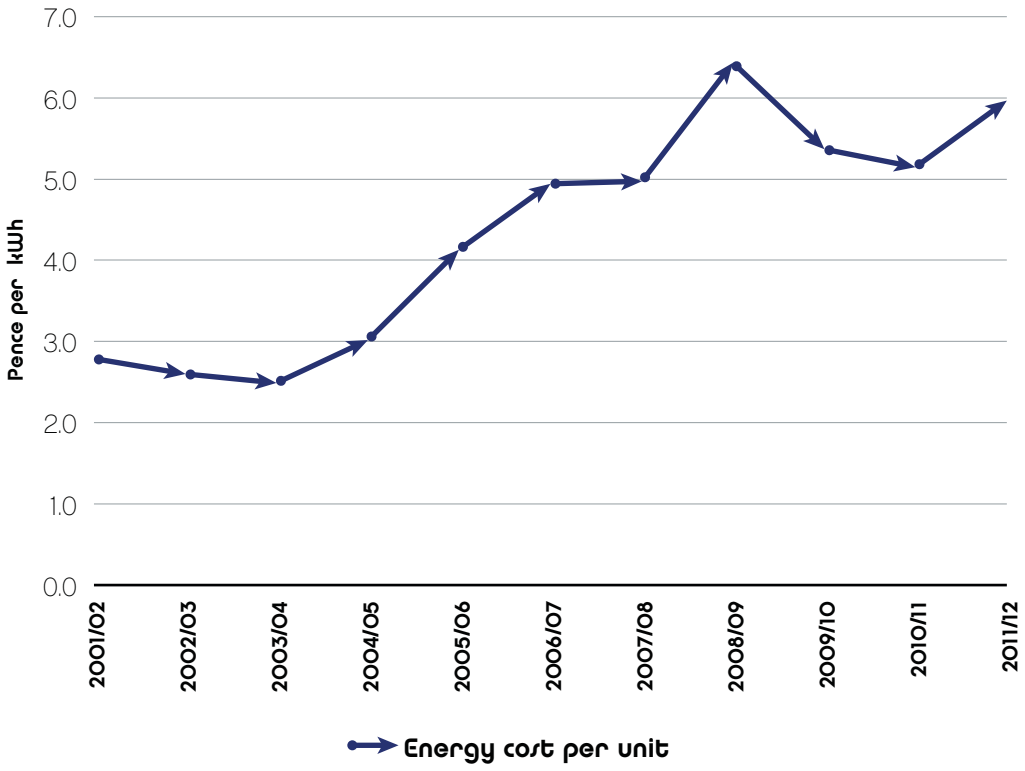


5.8 The graph (Fig.15) shows the inexorable rise in the cost of energy.

5.9 It is a cost of the combined fuel sources, calculated by dividing total consumption (non-resi) by total cost.

5.10 It will be impacted by fuel switching, but we cannot ascertain this due to the lack of data.

Figure 15. Cost of energy (pence/kWh).



Energy cost £ per m² (GIA) and energy consumption (kWh/m²) since 2001/02

5.11 As previously stated, a significant element of this chart (Fig 16) is that energy consumption in terms of kWh/m² has remained remarkably stable over a long period of time.

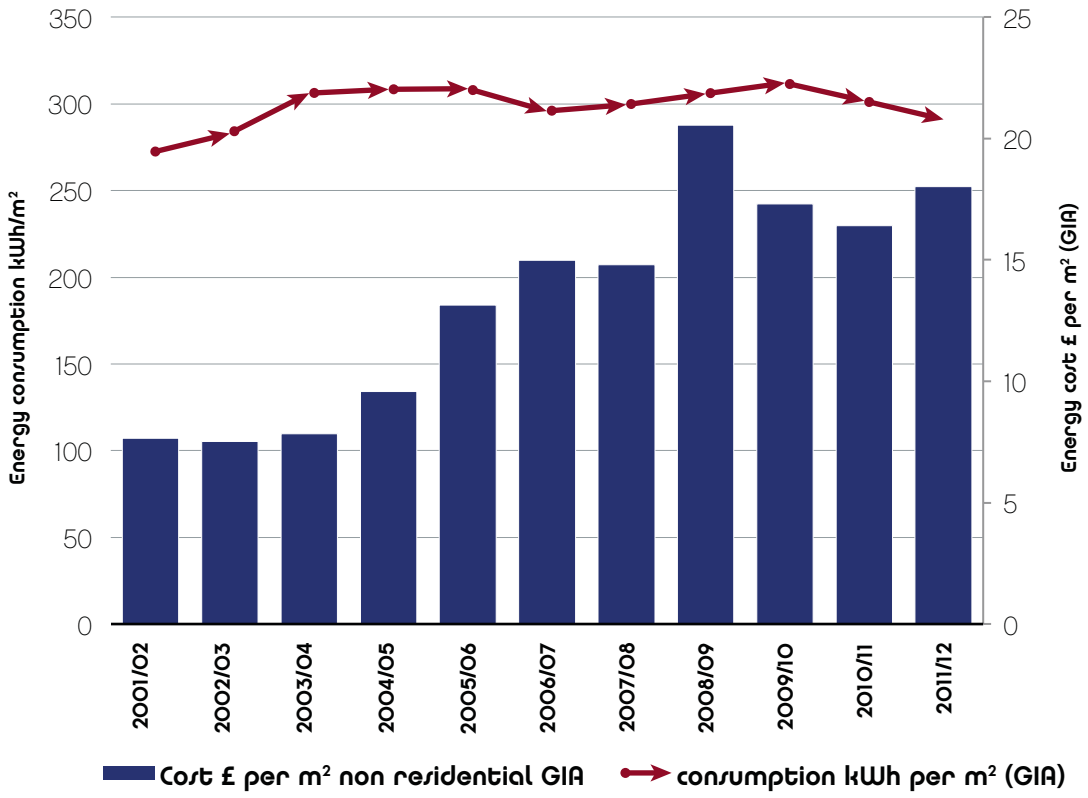
5.12 This is particularly interesting given that:

- **a** Over time buildings have become more complex, with a greater demand for comfort cooling and other expensive air handling.
- **b** There has been a substantial investment in 'sustainability' measures which have been designed to reduce consumption in line with Carbon Reduction targets.
- **c** Users are demanding a higher quality environment, with greater access to facilities which demand more servicing, such as networking facilities, catering outlets, washing facilities.

5.13 This suggests, if consumption has remained constant over time, utility cost increases can only be attributable to:

- **a** Increasing size of estate.
- **b** Increasing utility costs.

Figure 16. Energy costs per m² and consumption per m² over time



CONDITION, SUITABILITY AND AGE

CONDITION

6.0 As should be expected, the condition and functional suitability of the estate appears to be improving over time.

6.1 The amount of new space built after 1980 increases.

6.2 It is appropriate to include a new age category, which will be post 2000.

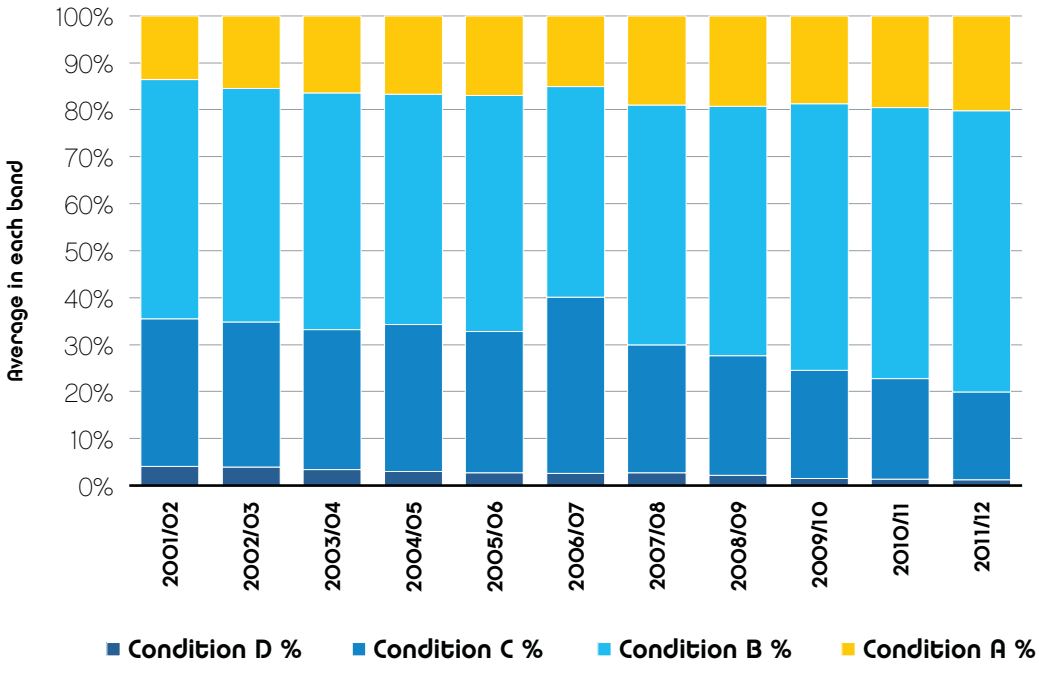
6.3 The data should be collected by area in future, rather than as a percentage of the whole estate. This would make analysis more appropriate as a weighted average could be used, and it would be possible to understand costs to improve the estate to Cat B, as an example.

6.4 Figure 17 presents a mean of the % of each University's estate that is in the different condition classifications. This is not an ideal measure, as it is not a weighted mean of the area in each classification.

6.5 However, it is apparent the condition of the estate is improving, with a decrease in the poor classifications of C and D, and a positive increase in classifications A and B.

6.6 Given the levels of capital investment, we would expect to see an improvement in condition, functional suitability, and newly built space.

Figure 17 Average % of estate in condition grades A – D



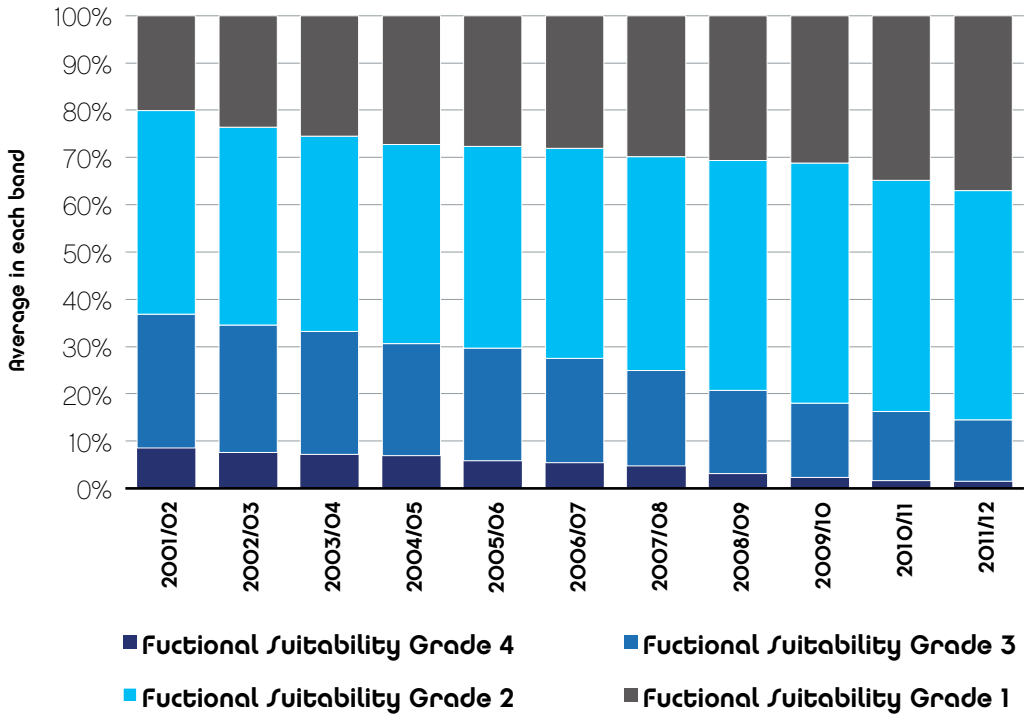
6.7 Note: this is a mean of the % of each University's estate that is in the different suitability classifications. This is not an ideal measure, as it is not a weighted mean of the area in each classification.

6.8 In future, figures should be returned in m^2 rather than percentages.

6.9 However, it does show that the suitability of the estate is improving, with significantly more of the estate in Suitability 1 and 2.

6.10 This is as one would anticipate given the levels of capital investment.

Figure 18. Average of % of estate in Suitability grades 1 – 4



6.11 Note: this is a mean of the % of each University's estate that is in the different suitability classifications. This is not an ideal measure, as it is not a weighted mean of the area in each classification.

6.12 In future, figures should be returned in m^2 rather than percentages.

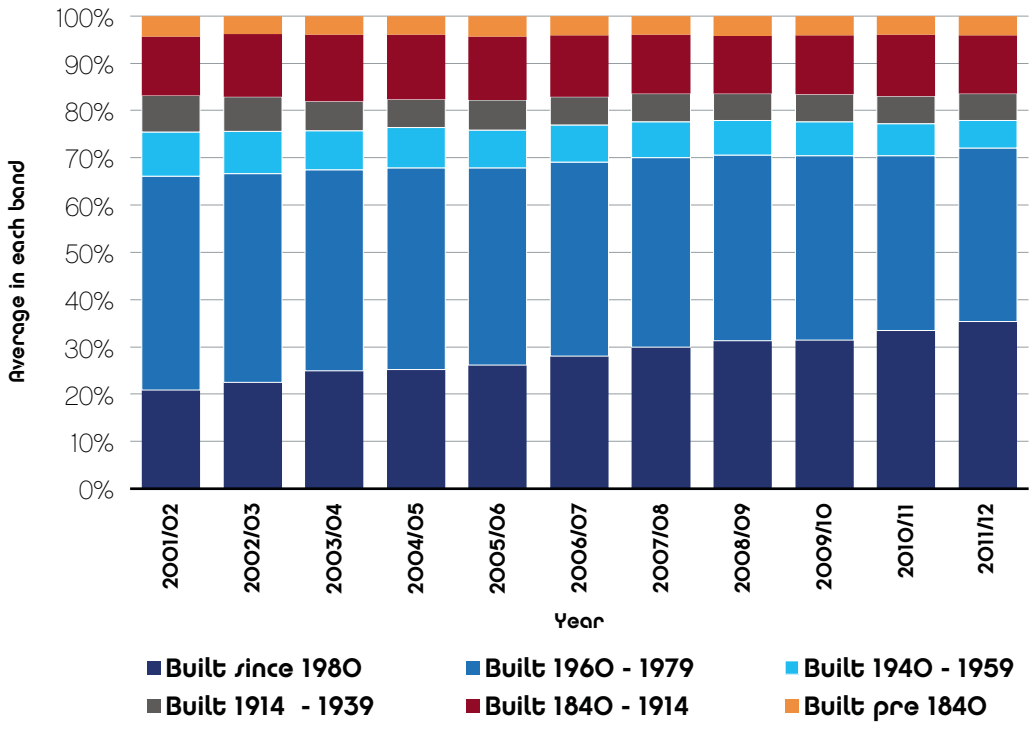
6.13 This shows that as capital is expended on building new estate, the average amount of space built recently increases, as expected.

6.14 However it is clear that there is a very large amount of the estate, 65%, which has been built prior to 1980.

6.15 Whilst a good proportion of this space may have been refurbished, there is likely to be substantial space that is still un-refurbished, forming the poorer condition and suitability ratings on previous graphs.

6.16 Space built since 1980 is also likely to begin to need substantial investment in the near future.

Figure 19. Average of % of estate in different age ranges



RESIDENTIAL ESTATE

7.0 It should not be assumed that the residential estate in the sector is now dominated by large scale private providers of student halls. This is very far from the case. The traditional University provided hall still accounts for a very large amount of provision (20%), second only to 'other privately rented'. Private sector halls have a small percentage of the provision (6%).

7.1 Residential accommodation is a critical part of the decision making for both students and their parents, and needs to be the 'right' offer.

7.2 Capital investment has increased recently, perhaps in response to the need to provide the right type of accommodation.

7.3 Student numbers have been increasing over the last 10 years, private sector halls have been the biggest growth area. Other rented accommodation has now ceased expanding, and the only growth in the sector is in the private hall providers (e.g. HMOs and private non-hall).

7.4 Institutions do appear to generate surpluses of about a third of their total income from their residential accommodation. Included within the costs could be a number of non-property related costs, such as student transport.

TOTAL COSTS, PROPERTY AND OTHER PER BEDSPACE (WITH INCOME)

7.5 The graph shows total residential income and expenditure (broken down into its different parts), and this shows that across the sector the provision of residential accommodation makes a surplus.

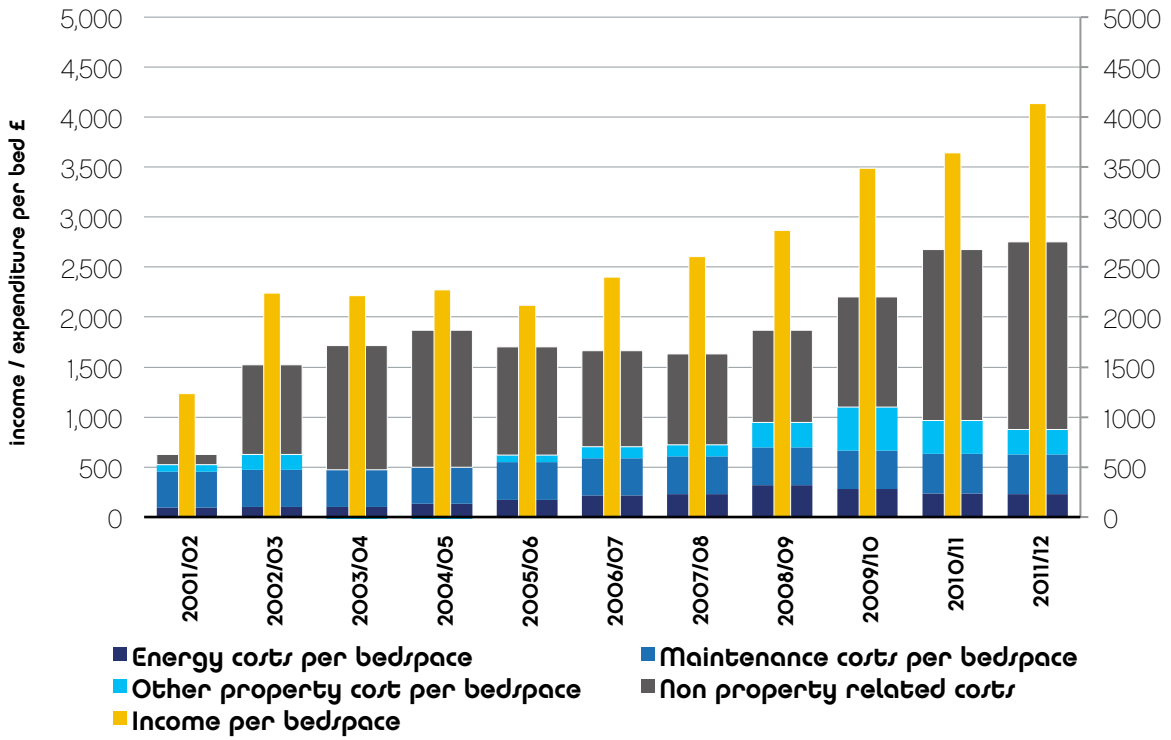
7.6 All costs have increased significantly over time, however, it is the non property costs which have increased most significantly.

7.7 Non property costs include a number of activities:

- **a** Catering.
- **b** Sports and other 'soft' service provision including e.g. transport, counselling and other services.

7.8 The chart (Fig. 20) shows how property costs are split between energy, maintenance and other costs.

Figure 20. Income and expenditure (property and non property) per bedspace over time



TOTAL CAPITAL EXPENDITURE RESIDENTIAL SPACE, NEW BUILD AND OTHER WORKS 2001/02 TO 2011/12

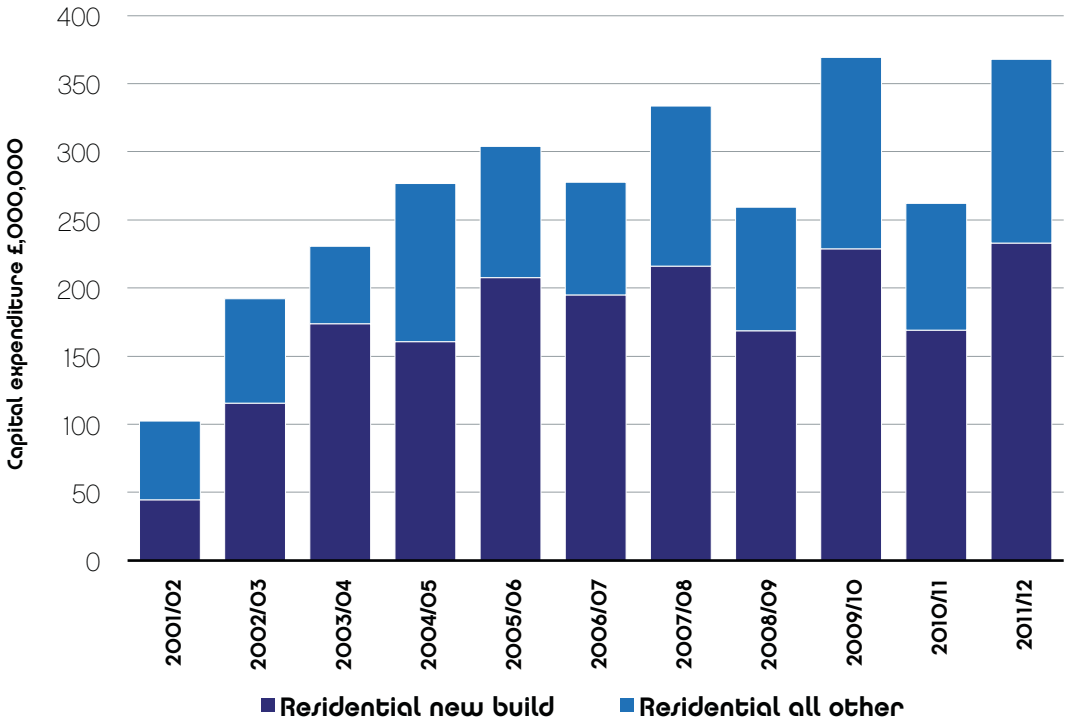
7.9 Capital expenditure reached a peak in 09/10 of £368m which was matched in 11/12.

7.10 Increase in expenditure on residential estate could reflect the need to address poor quality residential accommodation for recruitment and retention issues.

7.11 This expenditure may be limited to those institutions which still retain significant quantities of their own residences.

7.12 It is likely that institutions will continue to spend capital on their residential estates as there is evidence to suggest that accommodation is in poor condition in a number of larger institutions. Currently an average of 20% of residential accommodation is in condition C or D. The total cost to upgrade residential accommodation from conditions C and D to B is estimated to be £976 million.

Figure 21. Capital expenditure in the sector: residential



7.13 Key types of accommodation are:

- **a** Institution maintained: includes institutions own and private provided but managed by institution, as shown in Fig. 22.
- **b** Private sector halls: what we consider to be 3rd party provided and managed halls.
- **c** Parents/guardians home: studying from the parental home.
- **d** Own residence: probably mostly applicable to older and part-time students.
- **e** Other rented accommodation – 'typical student shared house'.

Figure 22. Type of term time accommodation (HESA)