

Bath and North East Somerset Local Plan

Student Numbers and Accommodation
Requirements Evidence Base

Part of the Strategic Housing Market
Assessment

July 2013

Introduction

- 1.1 This report presents the evidence that has led to the policy approach presented in the Core Strategy in respect of student accommodation and its likely impact. Students housing issues contribute to the totality of the housing market in BANES. Students need to be housed and the relationship between managed accommodation and the number of students impacts upon the wider market in respect of private sector student lettings and houses in multiple occupation.
- 1.2 The Council seeks to enable the continued success of The University of Bath and Bath Spa University and the contribution they make to the city's identity and profile. The development of new academic space and student accommodation are matters that require a suitable planning policy framework. The Council is mindful that the growth in student numbers during the last decade has not been accompanied by sufficient on-campus managed accommodation and that the associated expansion of the private student lettings market has diminished the 'normal' housing stock of the city. This is particularly significant given the relatively small size of Bath as a host city for two universities. The proliferation of Houses in Multiple Occupation (HMOs) in the Oldfield Park/Westmoreland area is the most visible consequence of the historic mismatch between the growth in students and managed student accommodation
- 1.3 The Council also understands that each institution needs to invest its academic estate in order to continue provide high standards. A strategic planning approach is needed that enables the realisation of a better balance between the aspirations of each university, the concerns of communities and the overall functioning, performance and environmental quality of the city and its setting.
- 1.4 This Information Paper establishes the current position with regard to the demand and supply for accommodation for students studying at the University of Bath and Bath Spa University and how this might change in the future.
- 1.5 For each university the evidence base presents information concerning the growth in student numbers since the mid 1990s; the current demand for student accommodation (in the form of bed spaces); the supply of managed accommodation (on-campus and off-campus), and the size of students lettings market.
- 1.6 It then considers how these relationships might change having regard to current planning policy, extant planning permissions, emerging proposals for bedspaces, the aspirations of each institution for on-campus development and their expectations in relation future student numbers.

The University of Bath

2.1 Table 1 and Figure 1 set out how the number of students enrolled at the University of Bath has increased during the last 18 years. For the 2012/13 academic year there were a total of 15,182 students enrolled, up from 6,776 in 1994/95.

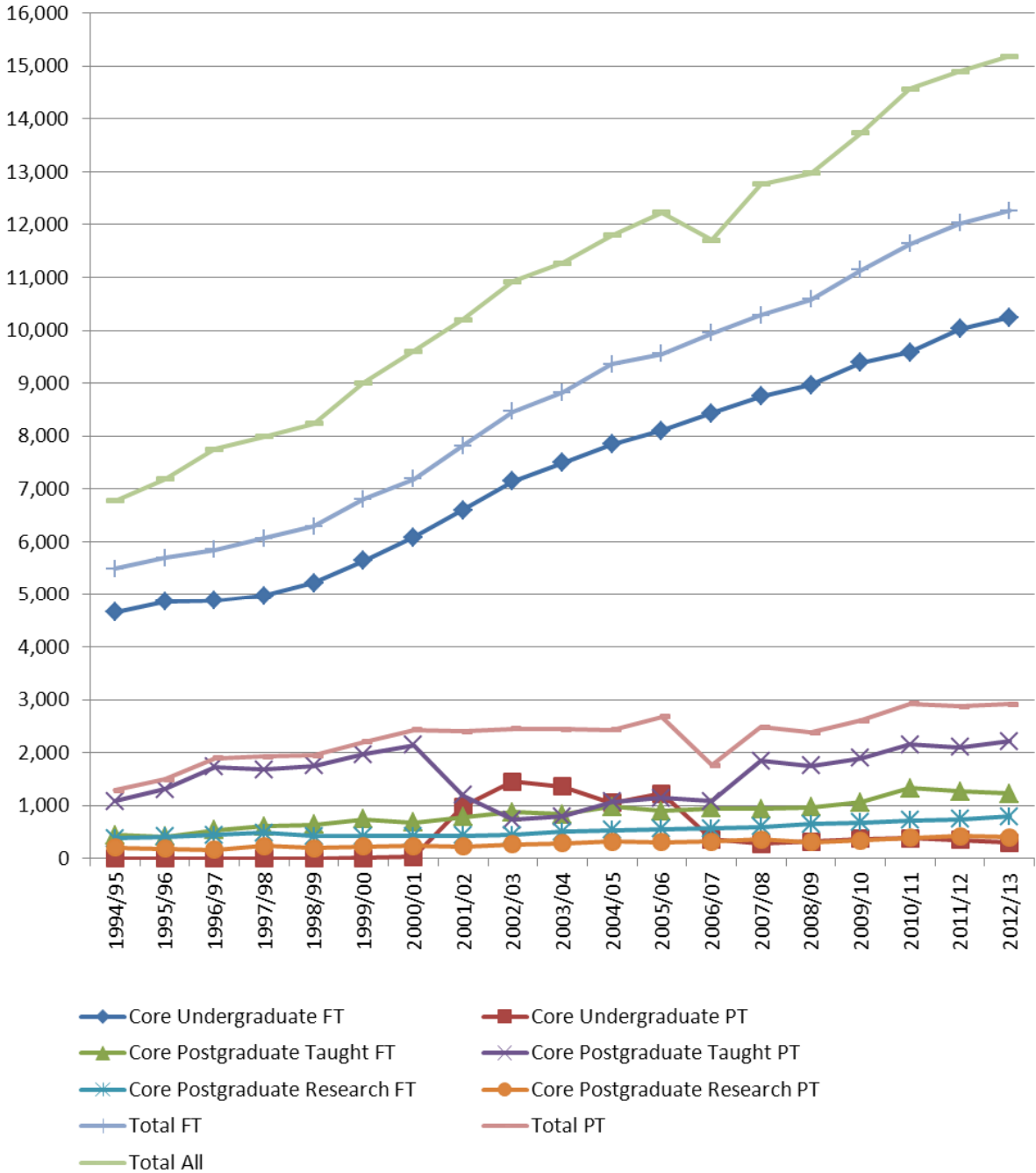
2.2 For full time undergraduates the long term compound annual average growth rate has been 4.24% since 1994-95. During the last 5 years the growth rate has been 3.2%

Table 1: University of Bath Student Numbers 1994/95 -2012/13

Year	Core Undergraduate		Core Postgraduate				Total FT	Total PT	Total All
	FT	PT	Taught		Research				
			FT	PT	FT	PT			
1994/95	4,656	0	449	1,086	379	206	5,484	1,292	6,776
1995/96	4,865	0	411	1,310	414	187	5,690	1,497	7,187
1996/97	4,876	0	533	1,730	443	170	5,852	1,900	7,752
1997/98	4,977	0	609	1,684	482	240	6,068	1,924	7,992
1998/99	5,222	0	643	1,750	422	196	6,287	1,946	8,233
1999/00	5,641	9	746	1,965	421	228	6,808	2,202	9,010
2000/01	6,086	36	678	2,147	420	243	7,184	2,426	9,610
2001/02	6,599	977	781	1,194	430	224	7,810	2,395	10,205
2002/03	7,147	1,450	874	735	447	269	8,468	2,454	10,922
2003/04	7,494	1,365	831	793	503	288	8,828	2,446	11,274
2004/05	7,844	1,052	979	1,068	536	316	9,359	2,436	11,795
2005/06	8,099	1,222	901	1,144	554	315	9,554	2,681	12,235
2006/07	8,430	363	952	1,078	564	317	9,946	1,758	11,704
2007/08	8,751	277	943	1,844	595	360	10,289	2,481	12,770
2008/09	8,968	321	971	1,749	647	314	10,586	2,384	12,970
2009/10	9,394	369	1,060	1,896	682	337	11,136	2,602	13,738
2010/11	9,589	385	1,325	2,153	721	392	11,635	2,930	14,565
2011/12	10,029	350	1,263	2,098	738	424	12,030	2,872	14,902
2012/13	10,242	297	1,230	2,213	795	405	12,267	2,915	15,182

Note: these figures exclude visiting students (235) and staff registered as students (32). The increase the total enrolment to 15,449

Figure 1: University of Bath Student Numbers 1994/95 – 2012/13



2.3 Growth in student numbers has been due to both domestic and overseas sources, the later now account for 20% of the total enrolment.

Figure 2: University of Bath - Fee Paying Status - Numbers

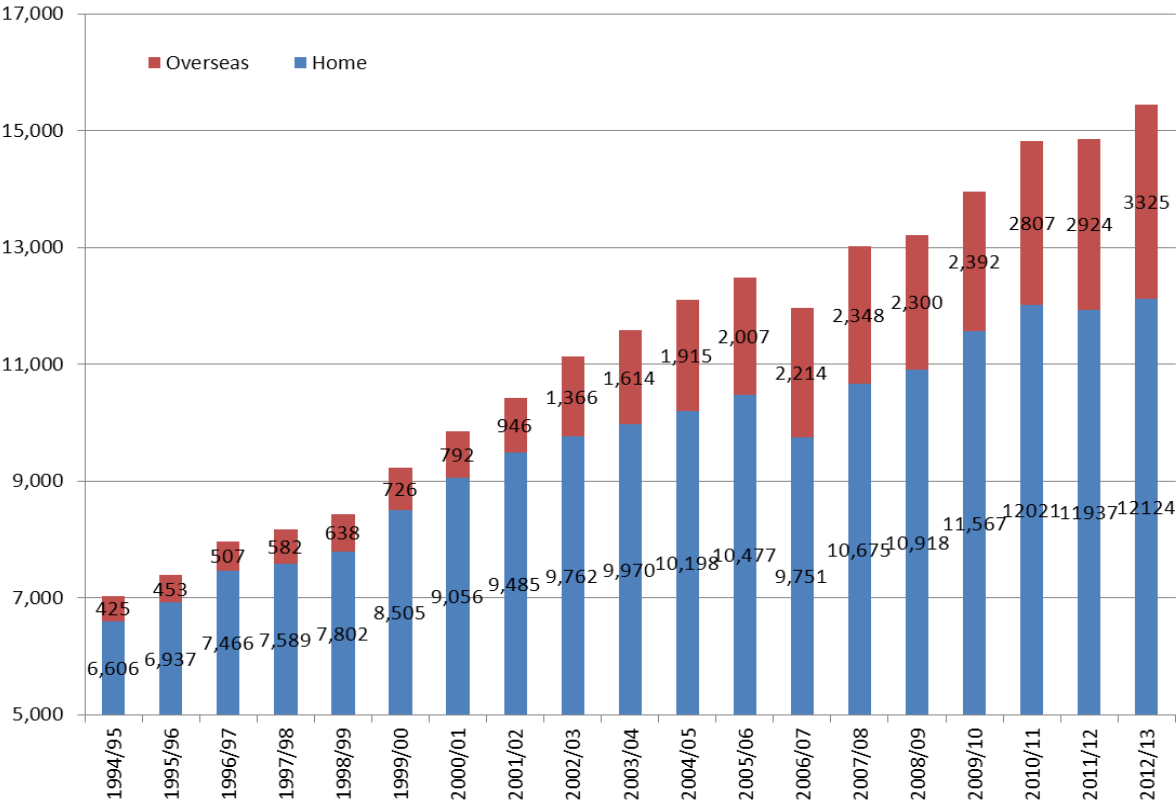
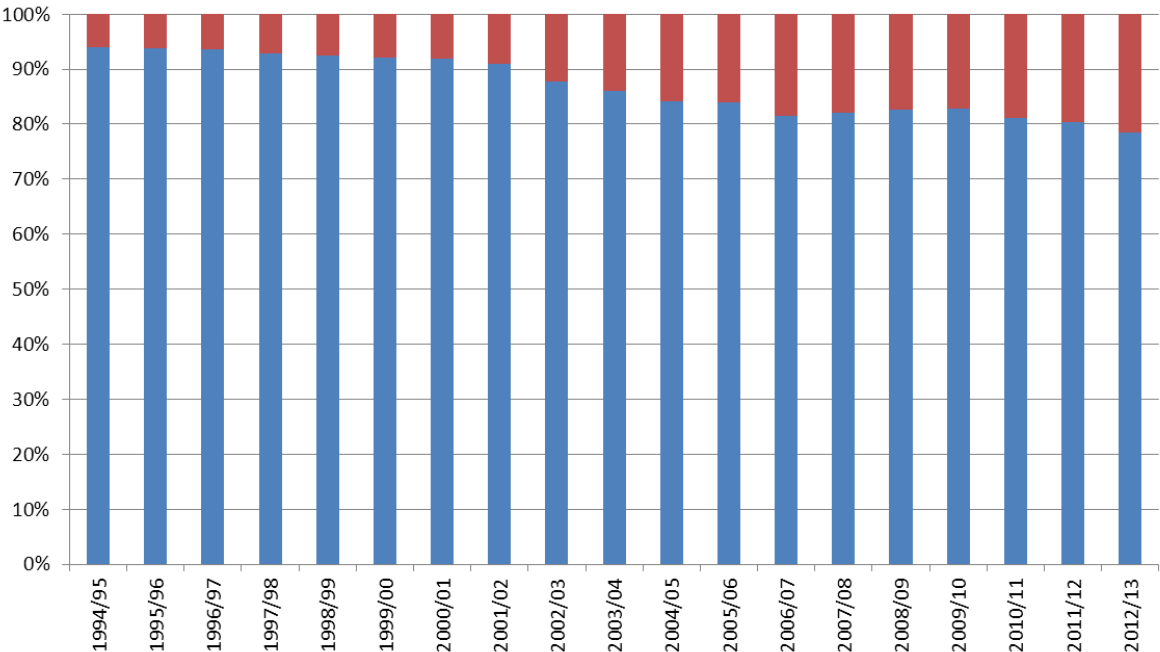


Figure 3: University of Bath Fee Paying Status - Share



2.4 Not all students that are enrolled at the University of Bath are present within the city or accommodation during term time. The following analysis shows how the number of students requiring accommodation in Bath/BANES can be derived from the total enrolment.

Total student enrolment at the University of Bath is about 15,500

Of these, 1,200 students are on distance learning courses, 1,700 are on their sandwich year, 50 are studying overseas and a further 50 are classed as dormant i.e. left within the first term. This totals 3,000.

Of the 1,700 on their sandwich year, 400 maintain a BA postcode and are perhaps on placement in Bath or the sub-region.

This means that the total number of students who can initially be discounted as needing accommodation within a BA postcode in 2012/13 is about 2,600.

Therefore, from this initial filter, 12,900 students are likely to require accommodation within a BA postcode. These can be subdivided as follows.

- Group 1 400 sandwich students on placement but living within a BA postcode
- Group 2 4,340 sandwich students who are not currently on their placement year who are full time on campus
- Group 3 6,465 non-sandwich course students who are full-time on campus
- Group 4 1,760 who are part-time on campus

An analysis of the term time postcodes of groups 1-3 reveals that 9,330 have a BA postcode, 1,700 have a non BA postcode and 1,450 have an international address or no postcode. The later is assumed as the home addresses international students who indeed do live in a BA postcode during term time.

Together with Group 1, Groups 2-4 yield about 11,200 students in need of accommodation in a BA postcode. Of these, just 50 live at home with parents within a BA postcode, leaving 11,050.

A more significant trend is home ownership or a long term tenancy amongst students. 1,781 are classed as homeowners or people that rent long term. About 800 of these are undergraduates and 1,000 are postgraduates. The undergraduate figure seems surprising on first inspection but may reflect investments in the housing market from the families of students (particularly overseas students). These are likely be shared dwellings of some sort and so the 800 undergraduates are not discounted from a residual housing need figure, but the 1,000 post graduates who state that they are homeowners or long term renters are discounted.

Once postgraduate home owners/long term renters are discounted the figure of 11,050 reduces to 10,050 students. This is **65%** of the total enrolment for 2012/13 and this ratio will be used for projections.

University of Bath - Current Supply of Student Accommodation

- 2.5 It is estimated that the University of Bath generated a need for 9,419 bed spaces in 2012/13. The University maintains 2,427 study bedrooms at its Claverton Campus. Elsewhere in the city the University maintains a total of 895 study bedrooms, resulting in a total stock of 3,322.

Table 2: University of Bath Study Bedrooms

Accommodation	Beds	Location
Woodland Court	349	Claverton Campus
Marlborough and Solsbury Court	463	Claverton Campus
Westwood	632	Claverton Campus
Brednon Court	126	Claverton Campus
Norwood House	139	Claverton Campus
Eastwood Complex	559	Claverton Campus
Polden Court	125	Claverton Campus
Osborne House	34	Claverton Campus
John Wood Court, Avon Street	176	City
John Wood, Main Building	61	City
Carpenter House, Broad Quay	133	City
Pulteney Court, Pulteney Road	133	City
Thornbank gardens	217	City
Clevelands Buildings, Sydney Wharf	154	City
Canal Wharf, Sydney Wharf	21	City
Total	3322	Bath

- 2.6 In 2012/13 the stock of managed accommodation catered for 35% of the residual need (9,419) for accommodation, leaving 6,097 students (or thereabouts) to find accommodation in the private rented sector. Analysis of available properties in Bath on studepad.co.uk reveals that the average size of a student HMO is 4 persons, so it follows that there may be currently be about 1,525 HMOs in Bath that cater for students and the University of Bath.

University of Bath - Future Plans for the Claverton Campus re living accommodation

- 2.7 The University of Bath's master plan currently runs from 2009 to 2026¹ and contains some key messages and drivers for planning policy re the balance between student and living accommodation.

The average annual growth in student numbers over the past ten years has been around 4% per annum. This has been fuelled by Government policy to raise participation rates in Higher Education and by the popularity of the University with prospective students. It is not expected that the University will continue to grow at historic rates in the period to 2026, but accurately predicting future growth and development needs over such a long period of time is very difficult, particularly in light of the changing policy and economic context within which Higher Education is provided in the UK.

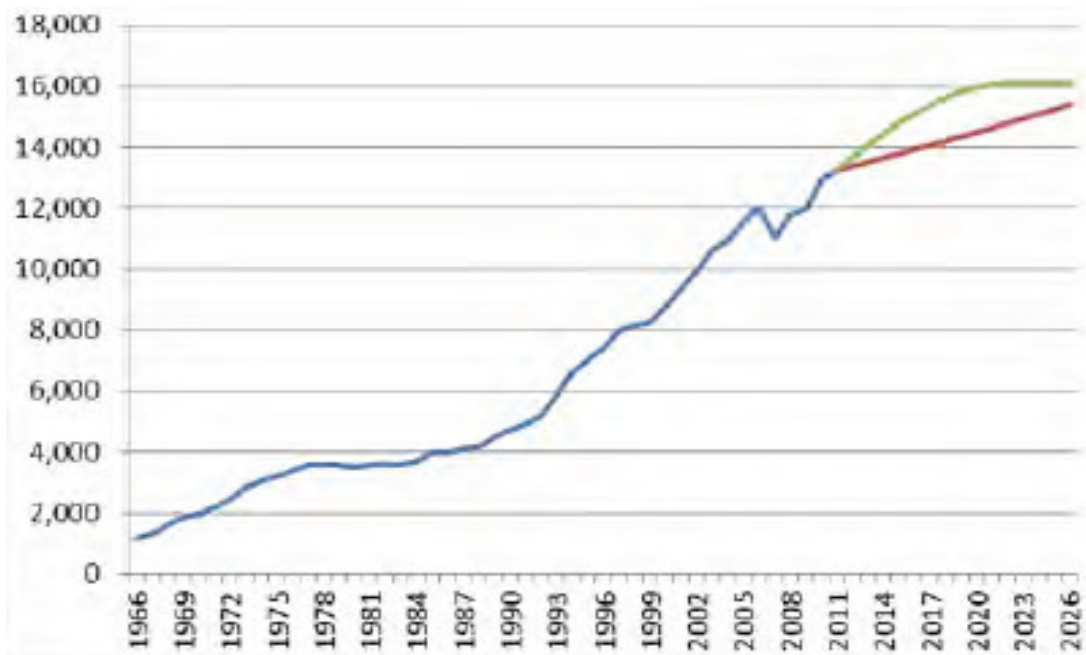
Indeed many of the determining factors are outside the direct control of the University. The Higher Education Funding Council for England (HEFCE) determines the number of UK and EU students that the University can recruit, and there is very high demand for those places from excellently qualified students.

The 2009 Masterplan Report outlined scenarios of predicted growth of between 1 and 3% per annum to 2020. Since 2009 actual growth has exceeded that in response to Government priorities, and the current student roll is approximately 500 students above those predictions. However, the University expects growth to reduce in coming years (as a result of the changes in student funding and continuing national and global economic pressures), and that will bring student numbers back within the 1-3% long term growth scenario to 2026.

- 2.8 The master plan contains the following graph labelled as figure 4 overleaf. The Council has been unable to source the background data to this graph, but from visual inspection (and verbal confirmation from the Director of Estates) concludes the red line represents 1% growth per annum and that the green line represents 3% growth per annum to 2020 and a stable population thereafter. This graph is based on FTE (full time equivalents) whereas the data presented in Table 1 and Figure 1 is more broken down by mode of study.

¹ <http://www.bath.ac.uk/estates/masterplan.shtml>

Figure 4 - University of Bath – Predicted Growth



- 2.9 The master plan seeks to increase the number of bed spaces on campus by 2400. This would double the number of on campus bed space from 2,427 to 4,827 and alongside the existing 942 off campus, bed space result in a total supply of 5,642. The first 708 new bed spaces are under construction and will be ready for occupation for the 2014/15 academic year.
- 2.10 The tables on the following pages present the implications of predicted growth as set out in Figure four. Two additional scenarios are also set out (1.5% pa and 2.0% pa 2011-26) but these do not reflect the university's position and are set out for comparison purposes only. Against the growth in student numbers the growth in bed spaces is set out with subsequent implications on the students letting market also highlighted (i.e. the impact of a surplus or deficit in the growth of bed spaces and HMOs against the growth of students).
- 2.11 Under the 1% scenario to 2026 (the red line in figure 4) the University provides a surplus of bed spaces over the growth in students needing accommodation - to the extent that it might enable 200 student HMOs to become non-student HMOs or other household types. This reduces to a surplus of nearer 60 at 2031
- 2.12 Under the 3% scenario to 2020 with consolidation thereafter (the green line in figure 4) the output is a shortfall of 475 bed spaces which may result in a need for a further 120 HMOs unless further additional accommodation can be provided either on campus, adjoining the campus or off – campus. Section 4 sets out what additional off-campus provision is in the pipeline.
- 2.13 The outputs of the 1.5% and 2% scenario can readily be seen but are produced for information only. They don't form part of the University of Bath's projections

Bath Spa University

Bath Spa University - Student Numbers and the Demand for Accommodation

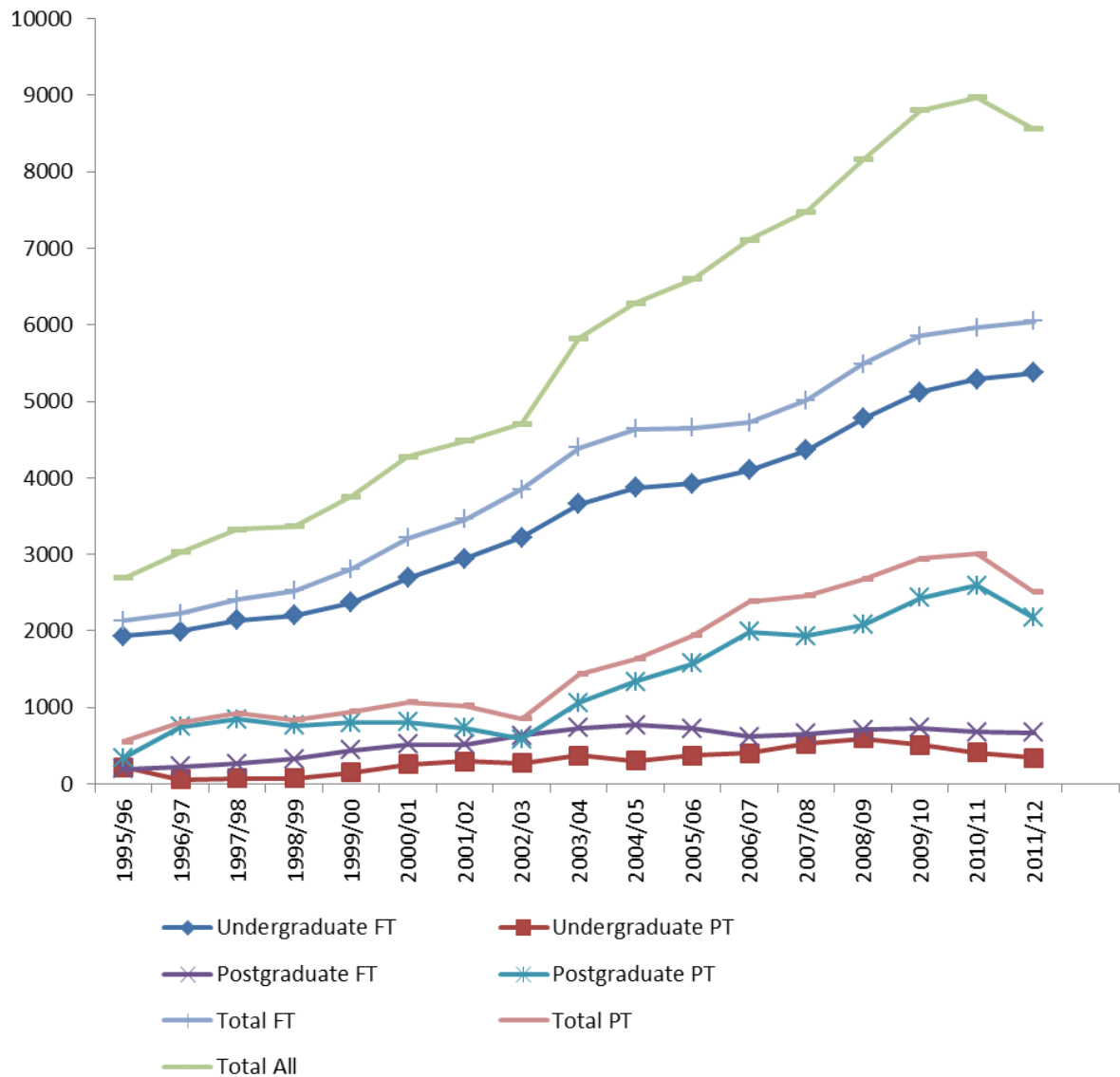
3.1 Table 4 and Figure 2 set out how the number of students enrolled at the Bath Spa University has increased during the last 17 years. For the 2011/12 academic year there were a total of 8,555 students, up from 2,696 in 1995/96. This is a compound annual growth rate of 7.0%. Of the 2008/09 total, 6,045 students (70%) were studying on full time courses.

Table 4: Bath Spa University - Student Numbers

	Undergraduate			Postgraduate			Total FT	Total PT	Total All
	FT	PT	Total	FT	PT	Total			
1995/96	1937	219	2156	200	340	540	2137	559	2696
1996/97	1997	60	2057	225	747	972	2222	807	3029
1997/98	2144	76	2220	264	847	1111	2408	923	3331
1998/99	2201	75	2276	325	764	1089	2526	839	3365
1999/00	2370	150	2520	440	800	1240	2810	950	3760
2000/01	2695	260	2955	515	810	1325	3210	1070	4280
2001/02	2945	295	3240	515	730	1245	3460	1025	4485
2002/03	3220	270	3490	630	585	1215	3850	855	4705
2003/04	3660	375	4035	730	1060	1790	4390	1435	5825
2004/05	3870	305	4175	770	1335	2105	4640	1640	6280
2005/06	3925	370	4295	725	1575	2300	4650	1945	6595
2006/07	4105	400	4505	615	1990	2605	4720	2390	7110
2007/08	4360	525	4885	655	1935	2590	5015	2460	7475
2008/09	4775	595	5370	710	2080	2790	5485	2675	8160
2009/10	5120	510	5630	735	2435	3170	5855	2945	8800
2010/11	5285	410	5695	680	2595	3275	5965	3005	8970
2011/12	5375	340	5715	670	2170	2840	6045	2510	8555
2012/13	-	-	-	-	-	-	-	-	-

Data for 2012/13 has not yet been released. The Council has requested this but it has not been forthcoming. The recent reduction in part time postgraduates is a notable feature of this data and the Council is waiting for an explanation for this.

Figure 5: Bath Spa University - Student Numbers



3.2 There is less data available that for the University of Bath is respect of proportion of total student enrolment requires accommodation in the city in the form of managed accommodation or other student lettings. The Councils working assumptions that all 6,045 full time students require accommodation and that part time students (2,510) no not. .

Bath Spa University - The Current Supply of Student Accommodation

3.3 Bath Spa has 1,053 units of accommodation (on and off campus). It can therefore accommodate 17.4% of the need. The University maintains 394 bed spaces at Newton Park. Off campus accommodation comprises

Waterside Court, Lower Bristol Road (316 units)

Charlton Court, Lower Bristol Road (300 units)

Bankside, Lansdown (43 units),

There are a further 50 Homestay units which are attractive to overseas students.

- 3.4 This leaves about 5,000 students who must find accommodation in the private rented sector. Assuming an average HMOs size of 4 persons (as evidenced for the University of Bath) means that there may currently be about 1,250 HMOs in Bath catering for students at Bath Spa University

Bath Spa University – Future Plans

- 3.5 A Strategic Framework has investigated thirteen University sites which it owns or leases, and provides information on the likely future of these sites and any proposed development. The Strategic Framework is based upon the vision and business plan for the University looking forward over a 5-year, 10-year and long-term time frame. Within this context a master plan for the Newton Park campus has been developed, the latest version of which is Revision 2 (April 2012)²
- 3.6 The master plan states that
- (1) student numbers are subject to government policy and approval and cannot be predicted with certainty but that Strategic Development Framework assumes no growth in student and staff numbers per annum over the next 10 years, although number are likely to vary year on year.
 - (2) there are Currently 394 student bed spaces at Newton Park and the plan is increase bed spaces to approximately 1,000 during the life of the Campus master plan.
- 3.7 Table 5 sets out the impact of the above. It has the potential to release 606 student bedspaces in the private rented sector which its equivalent to 150 student HMOs. These will either revert to non-student HMOs become occupied by other household types.

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Table 5: Bath Spa University, Demand and Supply for Student Accommodation

	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2030/31	Change 11-31		
Total Students	8555	8555	8555	8555	8555	8555	8555	8555	8555	8555	8555	8555	8555	8555	8555	8555	8555	8555	8555	8555	0	
Full Time	6045	6045	6045	6045	6045	6045	6045	6045	6045	6045	6045	6045	6045	6045	6045	6045	6045	6045	6045	6045	6045	0
Part Time	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	0
Housing Need Students	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	6,045	0
Beds On campus	394	394	394	394	894	894	894	894	894	894	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	606
Beds Off campus	659	659	659	659	659	659	659	659	659	659	659	659	659	659	659	659	659	659	659	659	659	0
Beds Total	1,053	1,053	1,053	1,053	1,553	1,553	1,553	1,553	1,553	1,553	1,659	1,659	1,659	1,659	1,659	1,659	1,659	1,659	1,659	1,659	1,659	606
Private Sector Deman&Supply of beds	4,992	4,992	4,992	4,992	4,492	4,492	4,492	4,492	4,492	4,492	4,386	4,386	4,386	4,386	4,386	4,386	4,386	4,386	4,386	4,386	4,386	-606
Private Sector Demand&Supply of HMOs	1,248	1,248	1,248	1,248	1,123	1,123	1,123	1,123	1,123	1,123	1,097	1,097	1,097	1,097	1,097	1,097	1,097	1,097	1,097	1,097	1,097	-152

Off Campus Sources of Supply

- 4.1 In addition to the programmes of development on campus the Council anticipates that additional off-campus managed accommodation will come forward during the plan period.
- 4.2 The current potential sources of supply can currently be identified, which total 887 bedrooms.

Bath Western Riverside: the Crest outline application (06/01733/OUT) proposes up to 675 student bedrooms or 375 bedrooms and a primary school. Therefore, a minimum of 375 bedrooms can be relied upon and this balance of uses in the Councils preferred scenario.

Lower Bristol Road (Twerton Mill/Twerton Riverside): a planning application was submitted here in May 2013 for 279 bedrooms in studio/cluster flats and 50 bedrooms in 7 townhouses (13/01876/EFUL). This totals 329 bedrooms. This application follows the refusal of an application for 428 bedrooms made in September 2012 (12/03949/EFUL). No in-principal objection was raised.

James Street West / BWR East: a planning application was submitted here in June 2013 for 183 bed spaces (ref: 13/02574/FUL). Student accommodation at BWR could certainly form part of the mix of uses for the comprehensive redevelopment of this area.

The Combined Picture

Current Picture

There are 23,700 students enrolled at the University of Bath and at Bath Spa University.

Not all of these require housing in Bath, and of those that do a significant number live in what might be termed conventional housing arrangement e.g. mature postgraduates and part-time students.

There is a residual of just over 16,000 students that need housing in the form of managed accommodation or in private sector student lettings, in the form of HMOs.

There are currently 4,375 bed spaces in managed accommodation either on or off campus

That means that there is a need for 11,625 bedspaces in the student letting sector in HMOs

At an average HMO size of 4, this requires about 2,900 HMOs.

Future Growth

Student numbers at Bath Spa are not expected to increase by 2022 (para3.60).

The time horizon of the University of Bath Plans is 2026. Growth will either be 2,431-4,419 by this point and this will generate a need for 1,580-2873 bedspaces.

Future Accommodation Plans

Bath Spa will develop a further 600 bedspaces to 2030. The University of Bath will develop a further 2,400 bed spaces 2026. Sources of supply with the city, re current projects, could yield 997 bedrooms. That is 3,887 bedspaces overall.

Impact on Wider Housing Market

Against the lower growth scenario the balance between the additional demand for bedspaces (1,580) and additional provision (3,887) results a surplus of 2,307 additional bedspaces overall. This

could impact on 575 HMOs which could revert to no-student HMOs or some other household type.

Against the higher growth scenario the balance between the additional demand for bedspaces (2,873 and additional provision (3,887) results a surplus of 1,000 additional bedspaces overall. This could impact on 250 HMOs which could revert to no-student HMOs or some other household type.