Bath and North East Somerset Local Plan

Historic and Future Student Numbers and Accommodation Requirements in Bath

(Part of the Strategic Housing Market Assessment)

December 2015

Bath Spa University, Newton Park Campus – 'The Gardens (561 beds)

Bath & North East Somerset Council

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Introduction

1.1 Student housing requirements form part of the totality of the housing market in Bath and exert a considerable influence upon it. Most students that are enrolled require accommodation in the city in one form or another, and accommodation supply needs to be available if enrolment aspirations are to be achieved (excluding distance learning etc). The relationship between need and dedicated accommodation impacts upon the size of private lettings sector, the number of houses in multiple occupation , house prices, rents, the ability of would-be house buyers to compete with landlords looking to increase their portfolios ,the nature of streets and neighbourhoods, and the housing stock profile of the city as a whole. In a small University town, hosting two HE institutions, that is also a World Heritage Site almost surrounded by AONB, with a multitude of development 'asks', a contracting supply of developable land, and negligible outward growth prospects – these issues are a 'big deal'.

1.2 Policy making that directly or indirectly affects the aspirations of the University of Bath and Bath Spa University, student accommodation (and academic space) requires an evidence base to inform formulation, decision taking and monitoring.

1.3 As far as possible, planning policy should to enable the continued success of The University of Bath and Bath Spa University (as it should any other positive force) and the contribution they make to the city's identity, profile and employment base (but … within the context of achieving holistic programme for the future sustainable development of the city and the multitude of uses that need to be accommodated). On an isotropic plain, land could be deployed to enable that. However, Bath is the antithesis of such a place and has a number of competing 'asks' of its developable land supply. In respect of the Universities there are costs as well as benefits that need to be evaluated and managed.

1.4 Beyond matters of land and property, the situation is made is complex beyond the direct sphere of planning policy by sectoral policy. Higher education institutions are subject to changing government policy e.g. around the way that they are funded (which has and still is changing), and this affects their plans for the future. As charities HE institutions are obligated to ensure that they remain sustainable and do not expose themselves to undue risk. The sector as a whole operates within very small margins, but with wide variations between institutions. The most significant risk areas relate to

- fall in home/EU student recruitment and retention in an increasingly competitive market
- failure to achieve overseas student recruitment targets

- further unanticipated public spending cuts in research and/or teaching income
- failure to effectively manage major capital investment programmes and their financial impacts
- rise in the cost of borrowing and availability of lending
- rise in staff and pension costs

1.5 Tuition fees are the main source of income and this depends on the numbers of students recruited and their domicile. In the current climate of lower public funding, HEIs are under greater pressure to generate higher surpluses in order to remain sustainable. Universities need to cover the (rising) costs of all their activities.

1.6 Retuning, to directly planning related matters - there was relatively little forward planning by universities and local authorities from in order to effect the expansion of dedicated student housing in response to expansion from the late 1990's. The Universities were good at securing dedicated accommodation to enable the growth in the intake of 1st year undergraduates, but little thought was really given to the provision of dedicated follow on space for 2nd, 3rd and 4th years. With a responsive HMO sector the Universities have been generally content for this to provide follow-on accommodation space. This is a logical response form their perspective. However, if/as the Universities keep expanding, so too (in the long run) might the the demand for follow-on HMO accommodation to the point where the normal housing stock of the city can become increasingly affected.

1.7 Historically the growth in student numbers has not been accompanied by a comparable increase in on-campus or off-campus managed accommodation and therefore expansion of the lucrative private student lettings market has priced out other buyers and has diminished the 'normal' housing stock of the city. 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. There is a danger that this situation could get worse, rather than better. At best it may only be possible to slow the rate of change, or hold it at current levels. This is not unique issue to Bath but is particularly significant given its relatively small size as a host city for two universities.

1.8 A town planning strategy is needed, based on an understanding of between the aspirations of each university, and the overall functioning, performance and environmental quality of the city and its setting and the concerns of communities and neighbourhoods affected by HMOs and. It may not be possible for all uses to be accommodated in Bath, without consequences for others. Crucially, the Council as Local Planning Authority has no direct[1] control over the recruitment objectives of each University. There are not only UK wide objectives for HE participation to consider, but also the way that HE Institutions are funded is a driver for growth. Nevertheless, a responsible institution will not recruit students into the city to at a rate that cannot be matched with additional places to live for the whole life term of study. Stories of student housing 'stress' would not be good PR in respect of further recruitment - and there are signs that, at last in respect of the University of Bath that this is beginning to emerge as an issue issue in 2015/16 and could be in 2016/17. This may well be related to the effect of the Article 4 Direction on HMOs conversions.

1.9 This paper establishes the current demand and supply for accommodation for students studying at the University of Bath and Bath Spa University, how this has been changing and how this might change in the future, based on what the LPA understands their aspirations to be.

1.10 For each university the evidence base presents information concerning the growth in student numbers since the mid-1990s; the current demand for student accommodation; the supply of managed accommodation (on-campus and off-campus), and the consequent size of students lettings market.

1.11 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 aspirations in relation future student numbers.

[1] Although the Development Plan can indirectly have an affect e.g. prioritisation of uses in strategy, land allocations uses, Article 4 Directions re HMOs

University of Bath

University of Bath – Enrolment of Core Students

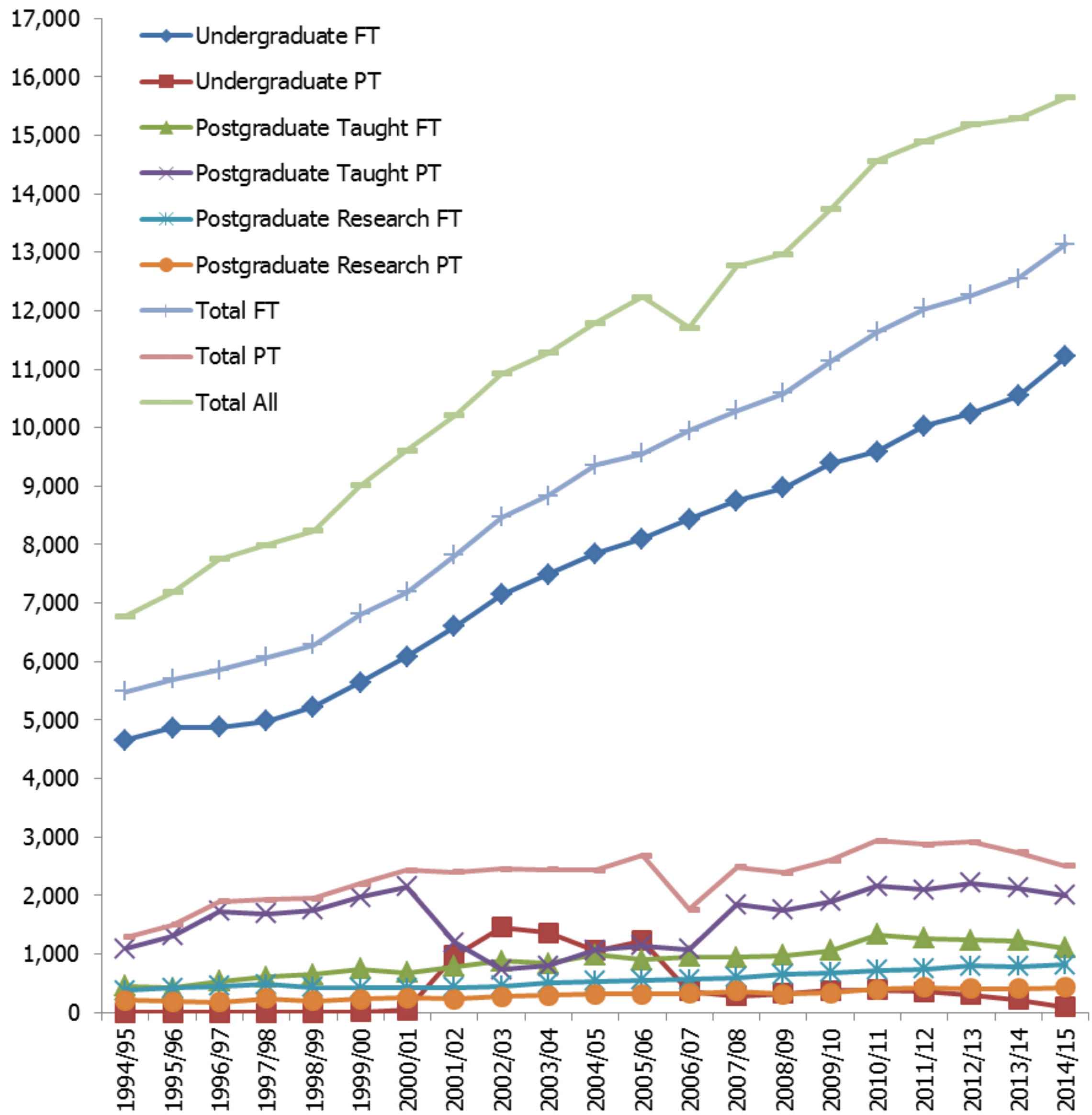
2.1 **Table 1** and **Figure 1** set out how the number of core students enrolled at the University of Bath has increased since 1994/95. For the 2014/15 academic year total enrolment was 15,645.

Table 1: University of Bath Student Numbers 1994/95 – 2014/15

Year	Undergraduate		Postgraduate				Total FT	Total PT	Total All
			Taught		Research				
	FT	PT	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
2013/14	10,547	217	1,226	2,122	780	401	12,553	2,740	15,293
2014/15	11,219	87	1,103	1,997	814	425	13,136	2,509	15,645
2015/16	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC	TBC

Source: http://www.bath.ac.uk/student-records/statistics

Figure 1: University of Bath Student Numbers 1994/95 – 2014/15

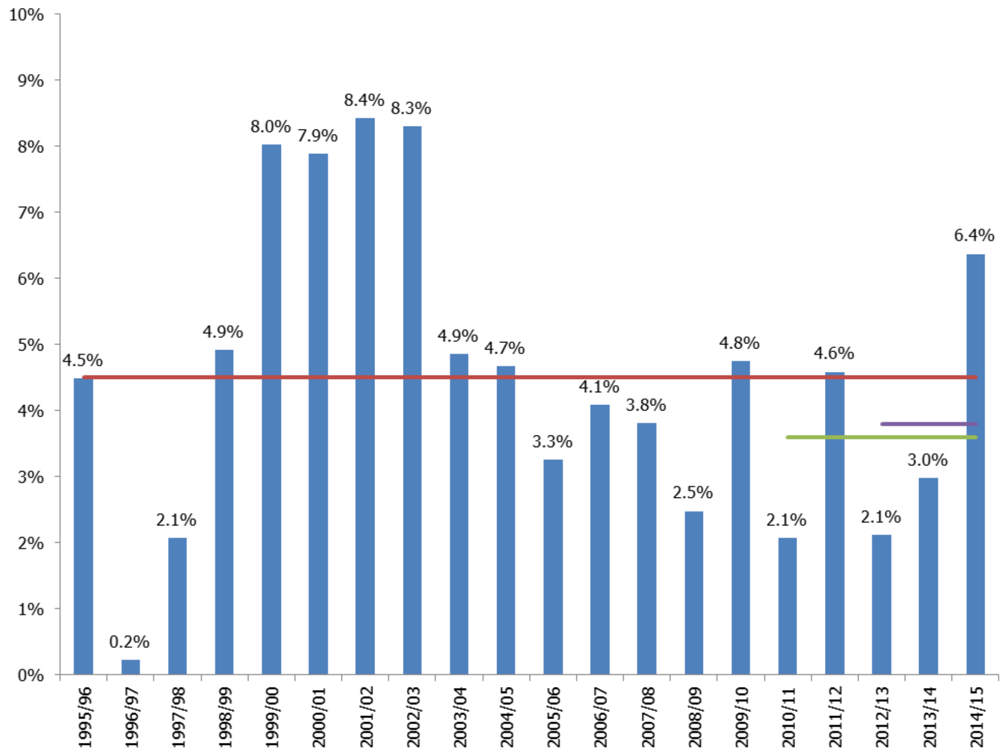


Note: Table 1 summarises the numbers of <u>core</u> students studying at, or in association with, the University of Bath in each academic year at the snapshot date of 1 December. It is at this date that early returns from Universities are made to the Higher Education Funding Councils. The overall total of students given in these tables is the number of those with active registrations at the census date; it excludes all students whose registration was in suspense, and those research students who, having completed their research, were writing-up their theses either with reduced supervision or without supervision. This figure excludes visiting students and staff registered as students. For 2014/15 these totalled 300 and this source of supply generally hovers around this number each year

2.2 **Figure 2a** shows the growth rate each year for **total enrolment**. It also illustrates that that the long term compound annual rate of growth for total enrolment has been 4.3% , whereas the most recent 5 year and 3 year rate has been 2.6% and 1.6% . **Figure 2b** shows the comparable figures for **full-time undergraduates** (the main source of students) are 4.4% (long term) 3.6% and 3.8% (for the last 5 and 3 years).

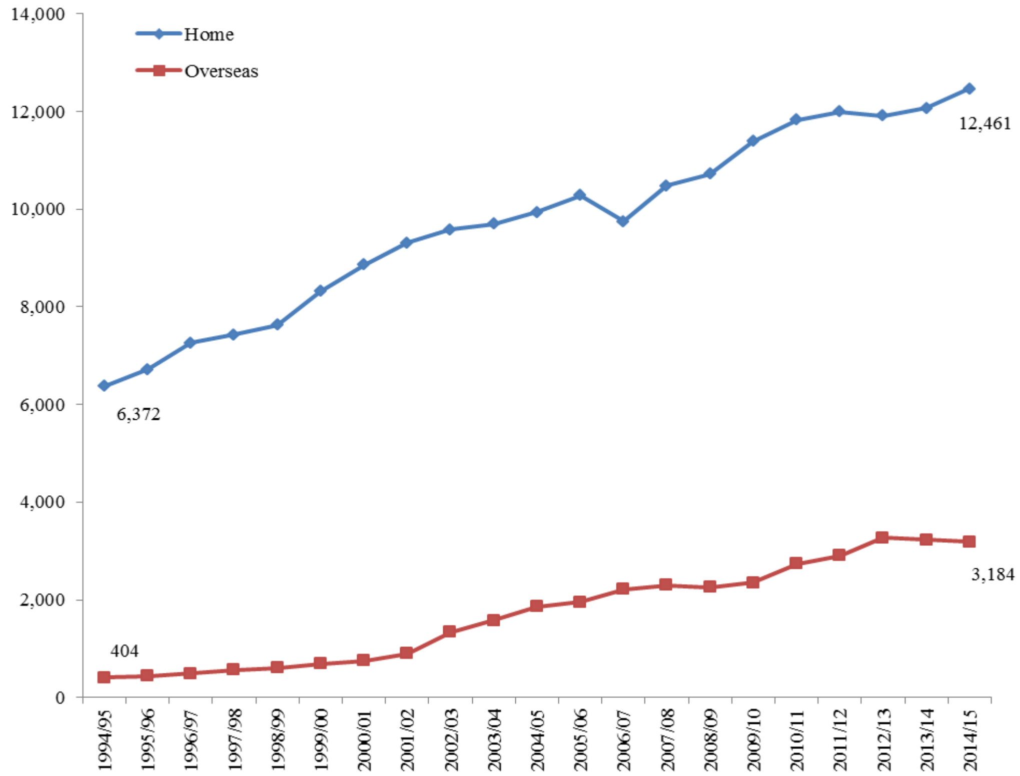
Figure 2a Total Enrolment – Annual and Compound Rates of Growth (%)

Figure 2b Undergraduate Enrolment – Annual and Compound Rates of Growth (%)



2.3 The growth in enrolment has been due to both domestic and overseas sources. Overseas numbers have increased from 5% of total enrolment in1994/95 to around 20%. The Council understands that University of Bath does not see the international share rising much further, if at all, although numbers may of course increase.

Figure 3: University of Bath - Fee Paying Status



University of Bath – The Demand for Living Accommodation 2011/12 -2014/15

2.4 Not all students enrolled at the University of Bath live within the city during term time. As well as distance learners, there are always a number of 3rd year undergraduates on a placement year. Further, of those students that do live in the city, not all are in need of managed or other shared accommodation within HMOs. For example, some students e.g. mature part-time student will rent without sharing or are owner occupiers.

2.5 At the time of the examination of Core Strategy in 2013/14, the analysis in Appendix 1 was used to calculate how the number of University of Bath students requiring managed or shared accommodation in Bath could be derived from total enrolment figures using address and mode of study data held by the student records office. The available data did not permit absolute precision but the analysis concluded that 65% of total enrolment was a reasonable assumption.

2.6 For the beginning of the plan period (2011/12) when total enrolment (based on December 2011 snapshot data) was 14,900 this multiplier generated a modelled need for 9,685 bedspaces, and applied to 2014/15 total enrolment of 15,645 it generates an updated modelled need for 10,170 bedspaces. This is a change of 485 bedspaces since the beginning of the plan period.

2.7 However, in more recent discussions with the University (July 2015) on future forecasts an alternative approach was presented by the University. This is to simply regard undergraduates on campus (i.e. not on placement) and full time taught and researching postgraduates as being in accommodation need. No further adjustment has been made to account for these types of students living at home within Bath or in the non-HMO private rented sector in Bath or living outside Bath. The LPA is not aware the University routinely undertakes a yearly analysis of where and how all of its students ae living.

2.8 Further, UoB has provided new total enrolment data for recent years (that is different to the source underpinning table 1), going back to 2012/13 (though not yet to 2011/12 which is the beginning of the plan period). This is set out overleaf in Table 1a. The first observation is that whilst the revised total enrolment figure for 2014/15 is very similar to the December 2014 figure for 2014/15 shown in Table 1 (-184), there are bigger differences for 2013/14 and 2012/13 (of -414 and -727 respectively). An explanation is sought from the University as to why this is so.

Table 1a University of Bath revised total enrolment data (July 2015)

	11/12	12/13	13/14	14/15
Undergraduates				
UG Intake	Tbc	2,833	3,140	3,473
Year on year change	Tbc		*307*	*333*
Total UG	Tbc	9,812	10,350	11,122
Year on year change	Tbc		*538*	*772*
Total UG on campus #	Tbc	8,594	9,088	9,668
Year on year change	Tbc		*494*	*580*
Total UG on campus %	Tbc	87.6%	87.8%	86.9%
Taught Postgraduates	Tbc			
Full Time	Tbc	1,230	1,226	1,103
Part Time	Tbc	2,213	2,122	1,997
Research Postgraduates	Tbc			
Full Time	Tbc	795	780	814
Part Time	Tbc	405	401	425
Student population	Tbc	14,455	14,879	15,461
Students requiring accommodation #*	Tbc	10,619	11,094	11,585
Students requiring accommodation %*	Tbc	73.5%	74.6%	74.9%
Difference (requiring accommodation)	Tbc		475	491
Sum Difference (requiring accommodation)	Tbc		475	966

* includes undergraduates on campus (i.e. not on placement) and full time PGT and PGR students

2.9 Using the revised enrolment data in Figure 1a the Council has used a figure of 14,000 as working estimate for total enrolment for 2011/12 (some 900 less than the comparable figure in Table 1). It has also applied the 2012/13 multiplier of *students requiring accommodation* of 73.5% to this figure. 14,000 is more likely to be less than the actual number, rather than more than it. The Council will revisit this working assumption when /if confirmed data for 2011/12 is made available.

2.10 This approach increases the baseline need figure to 10,290 bedspaces at 2011/12 (up from 9,685 using the 65% multiplier). For 2014/15 the need has increased to 11,585 bedspaces (up from 10,170 using the 65% multiplier). On this basis the need has increased by 1,295 since 2011/12.

University of Bath Supply of Student Accommodation 2011/12 –14/15

2.11 In 2011 the University had a supply of 2,452 study bedrooms on its Claverton Campus. Elsewhere in the city it directly maintained 895 study bedrooms, resulting in a total stock of 3,347. Since 2011 a further 704 bedspaces (The Quads) have been built on-campus, increasing campus supply to 3,156. Whilst there have been no increases in University of Bath managed accommodation in the city, there have been a number of unaffiliated private sector developments that are available to any student, whatever institution they attend. It is not possible to state how many University of Bath students have secured bedrooms in these developments (and this figure will change each year). Therefore an assumption is made that each set of students claim a half share of the available bedrooms. This brings total supply to 4,314 for 2014/15

Table 2a: University of Bath Study Bedrooms

Accommodation	**Beds**	**Location**
Westwood	632	Campus
Eastwood	559	Campus
Norwood House	139	Campus
Brednon Court	126	Campus
Polden Court	125	Campus
Osborne House	34	Campus
Marlborough and Solsbury Court (2003)	463	Campus
Woodland Court (2008)	349	Campus
The Quads (2014)	704	Campus
Campus Sub Total	***3,156***	***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
UoB City Sub Total	***895***	***City***
Other City Sub total	***263***[2]	***City***
Total	**4,314**	**Bath**

[2] See page x for further details of each development

2.12 Based on the original assumptions set out in paragraph 2.6, the supply identified in Table 2a was able to cater for 34.5% of need in 2011 and 42.4% in 2014/15. Whereas under the original assumptions bed space demand has increased by 485, the number of University controlled bedspaces has increased by 967. This means that unmet need will have decreased by around 500.

Table 2b Demand and supply (original assumptions)

	2011/12	2014/15	Change
Demand	9,685	10,170	+485
Supply	3,347	4,314	+967
Supply as % of Demand	34.5%	42.4%	7.9%
Residual #	6,338	5,856	-482

2.13 However, based on the new assumptions set out in paragraph 2.9, the supply identified in Table 2a was able to cater for 32.5% of need in 2011 and 37.2% in 2014/15. Further, whereas bed space demand has increased by 1,295, the number of University controlled bedspaces had increased by 967.

Table 2c Demand and supply (new assumptions)

	2011/12	2014/15	Change
Demand	10,290	11,585	1,295
Supply	3,347	4,314	+967
Supply as % of Demand	32.5%	37.2%	4.7%
Deficit #	6,943	7,534	+328

2.14 Analysis of available properties in Bath on studepad.co.uk reveals that a reasonable assumption for the average size of a student HMO is 4 people. On the basis of the modelled approach taken it follows that there should be about 1,883 HMOs (new assumption) in Bath catering for students at the University of Bath. That equates to about 4.7% of the total dwelling stock of the city at 2014/15 (40,000).

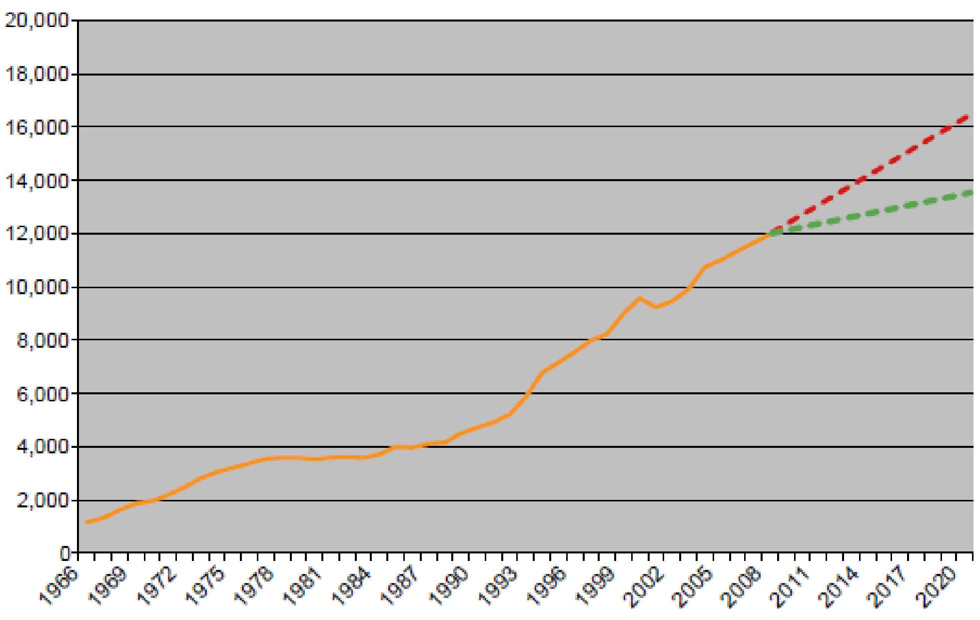
Current and Historic Forecasts of Growth to 2020 and beyond

2.15 Having established historic changes in students numbers since 1994, and modelled the demand and supply situation at the start of the plan period (2011/12) and the latest available position (2014/15). The next stage of analysis is to set these positions a wider context of forecasting assumptions that have been made. This section sets out the recent history of forecasting student numbers for the University of Bath. It begins with the vision for long term change to 2020 and 2026 that was set out in the 2009 masterplan, and then presents updates made in 2012 and 2015.

The 2009 Masterplan

2.16 The 2009 masterplan contains the graph reproduced here as Figure 4. This forecasted growth in enrolment (in the form of full time equivalents rather than actual students) to 2020/21. The red line represents 3% per annum growth to 2020 and the green line 1% per annum growth to 2020/21. This shows there were around 12,000 FTEs and that the assumption was for growth of just under 2,000 FTEs to a little over 4,000 FTEs.

Figure 4: Forecast Growth to 2020 (2009 Master plan)



2.17 The University of Bath has since published two 'summary updates' to the 2009 masterplan (in 2012 and 2014) to reflect development the on campus and tweaks to its estate strategy. These updates also reflect on the forecasts of student numbers made in the original 2009 master plan.

2012 Masterplan Summary Update

2.18 In respect of student growth the 2012 states that:

> *"The average annual growth in student numbers over the past ten years has been around 4% per annum* [see Council's corroboration in figs 2a and 2b above]*. 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[3], 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.*

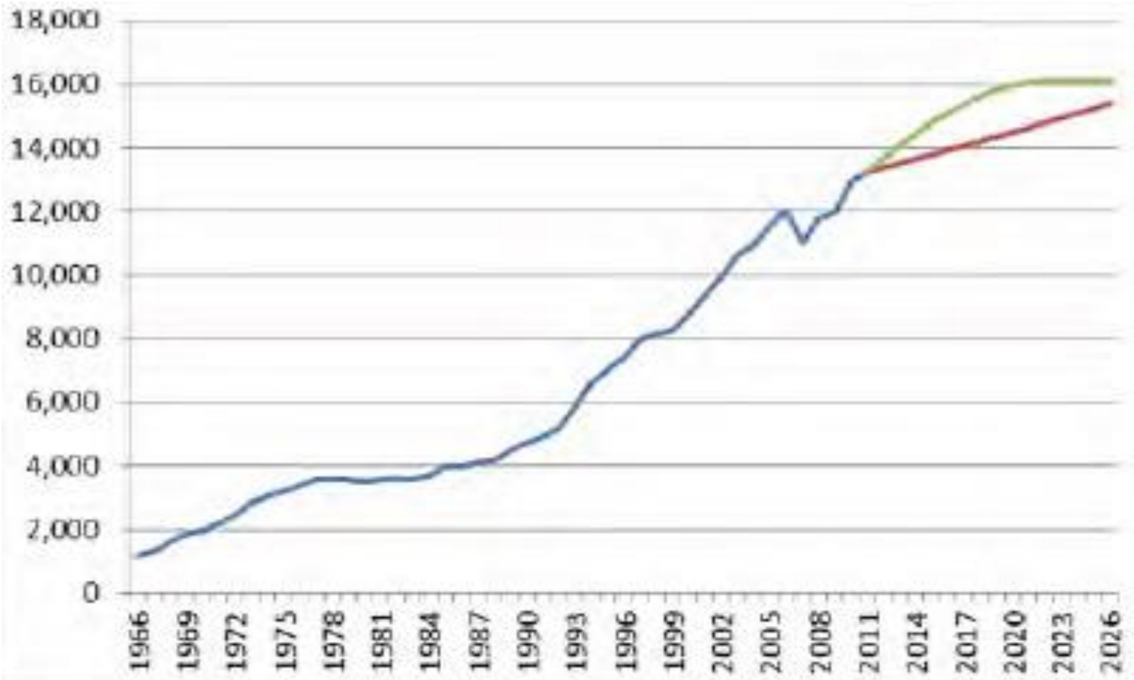
2.19 The 2012 summary update also included the graph reproduced in this document as Figure 5 (updating the one presented in the original 2009 master plan i.e. Figure 4). Figure 5 shows that, on its best assumptions the University anticipated that it would reach between 15,000-16,000 FTEs by at least 2026, or maybe/more likely earlier.

2.20 In Figure 5 the red line represents 1% growth per annum from 2009 to 2026 and the green line represents 3% growth per annum to 2020/2021 and a stable population thereafter. It is important to understand that Figure 5 is based of FTEs (full time equivalents) whereas the

[3] This is no longer a the case as on December 5th 2013, Government announced the cap on the number of UK and EU-domiciled undergraduates that English HE institutions may recruitment would be relaxed in 2014/15 and abolished in 2015/16.

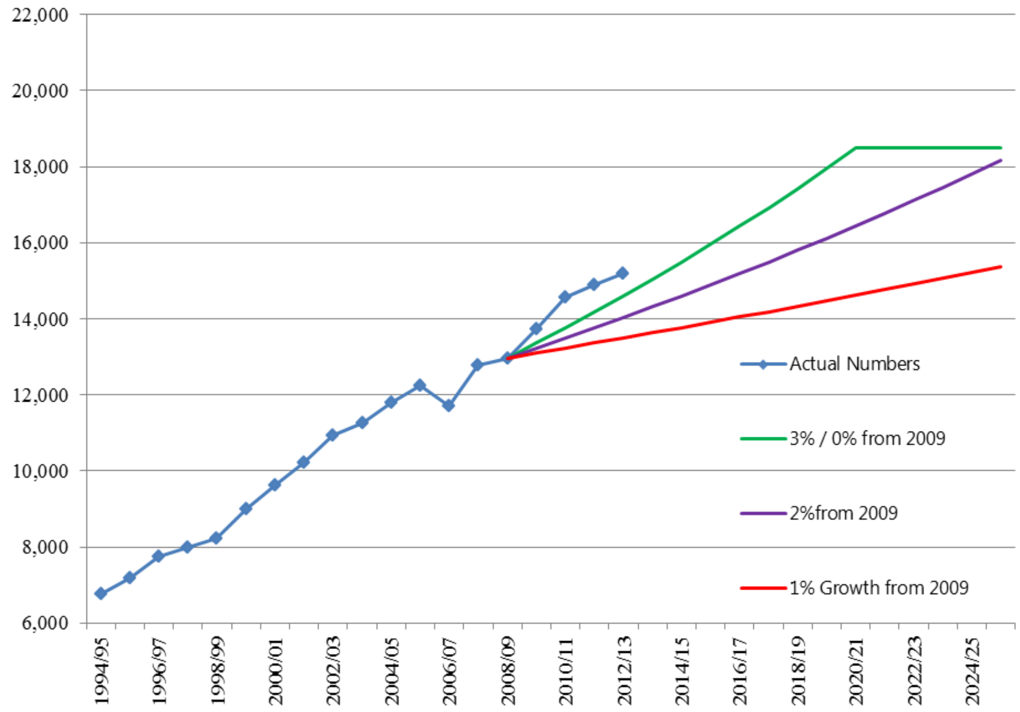
data presented in Table 1, Table1A and Figure 4 is for total students, broken down by mode of study (part time or full time).

Figure 5: University of Bath, 2012 Update to Forecast Growth to 2026 (Full Time Equivalents)



2.21 This report has adapted Figure 5 to produce Figure 6 (based on total student numbers, rather than FTEs) using the total enrolment data in Figure 1. It sets out December snapshot data from 1994/95 (blue line with markers) and forecast change from the beginning of the 2009/10 academic year, based on the scenarios shown in Figure 5 (of 1% or 3% followed by stability). A 2% scenario is la (which over the long term is the same as the 3% followed by stability).

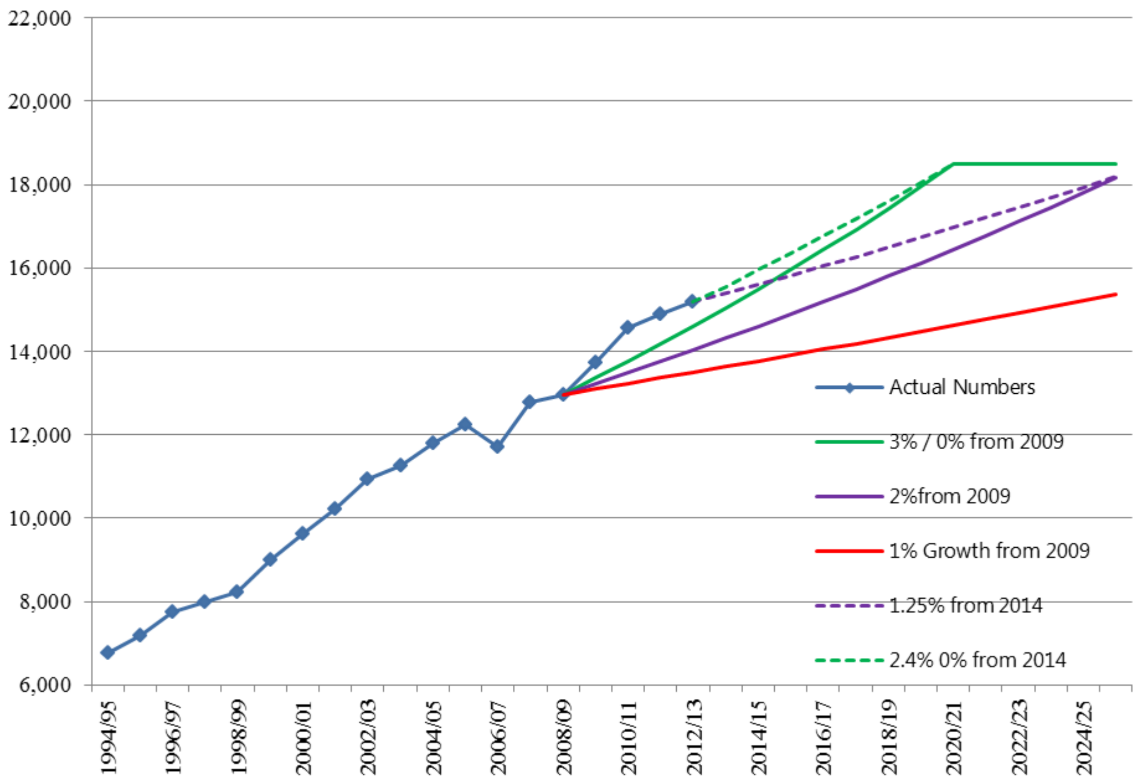
Figure 6 - adaptation of Figure 5 based on total student numbers (using December snapshot data)



2.22 **Figure 6** shows that at the time of the 2012 Summary Update, actual growth (based on December 2012 snapshot data for 2012/13) was indeed running ahead of the original 2009 masterplan projections, as acknowledged by the University (see para 2.18). However, the University expected the FTE student population to fall within the projected numerical range set by Figure 5 over the longer term. This equates to the top end of the range shown in Figure 6 of around 18,500.

2.23 Therefore, for the size of the University to fall within the range envisaged in **Figures 5 and 6,** average annual growth from 2013/14 would have to be as shown in **Figure 7** as dashed green and purple lines i.e. not more than 1.4% (to achieve the 2009-based 2% outcome) or 2.4% to 2021, followed by stability (to achieve the 2009-based 3% outcome to 2020, followed by stability).

Figure 7 Implied growth trajectories from 2013/14 if original 2009 forecasts to be met.



2.24 Drawing on the Universities forecasts in the 2012 summary update, total enrolment (actual students) were estimated increase to about 18,200-18,500 against the figure at the start of the plan period of 14,900 (2011). This would have resulted in an increase of about 3,300-3,600 actual students.

2.25 In terms of additional bedspaces needed, and applying the original 65% multiplier (in place at that time), this resulted in a likely increase in demand from 9,685 bedrooms in 2011 to 12, 025 bedrooms in 2026 (or more likely earlier i.e. by around 2020 depending on the growth curve). This was an overall net change of <u>up to 2,340 bedrooms</u>.

2014 Master Summary Update

2.26 This update said nothing additional in respect of student numbers that had not already been stated in the 2012 update.

July 2015 Forecasts (received in informal discussions)

2.27 In July 2015 the University produced updated growth forecasts/aspirations (reproduced in Table 3). These are base dated at 2012/13 and run until 2020/21. They show the total student population increasing from 14,435 to 19,291 (an increase of 4,836 or 33%). This compares to a previous upper estimate of 3,600 growth over the slightly shorter period 2011/12-2020/21.

2.28 **Table 3** relates to the period 2012/13 onwards rather than 2011/12 onwards (which is the important date for Plan monitoring purposes). In paragraph 2.9 the Council made a working assumption that the 2011/12 revised baseline was 14,000 for total students and Table 3 has therefore been amended by adding 455 to the total change figure of 4,836 more students i.e. to 5,291. On this basis an upward adjustment needs to be made to the growth in the number of students requiring accommodation in the 2020/21 academic year i.e. to 4,723 (an increase of 329). Even if this is a slight under statement (i.e. there were more than 14,000, it would simply reflect a level of growth that would probably be aspired some one or two years later and well within the plan period.

2.29 A revised additional demand figure of 4,723 is 2,383 more students in need that the 2,340 envisaged during the preparation of the Core Strategy as set out in paragraph 2.25. This additional demand derives from twin factors; stronger growth aspirations than previously envisaged, but also (and mostly) the effect of a new higher housing demand multiplier and the fact that this is forecast to increase over the period.

2.30 Had the original 65% multiplier remained in force as a constant throughout the forecasting period, the revised change figure (using the same enrolment forecasts in Table 3) would have been 3,439 (1,455 less than 4,894, yet 1,100 more than the 2,350 identified in 2012). Therefore the new and changing multiplier of the forecasting period accounts for around 57% of the increased demand that would arise from the July 2015 aspirations. It therefore follows that 43% of increased demand relates to an increase in actual enrolment assumptions.

2.31 **Figure 8** plots the forecasts in **Table 3** against previous forecasts. The black line with square markers represents the July 2015 forecast. It equates to a compound annual average growth rate of 4.2% (the long term historic rate).When plotted against previous forecasts one can see that there is a discrepancy in the 2012/13 baseline figure of around negative 700. An explanation from the University is needed for this. Based on the latest forecasts, the growth aspiration is not set to flatten out any time soon but to continue its historic long term trend of over 4% per annum and exceed the 3% upper end forecast that was made in 2009.

What will happen after 2020/21 (if the aspiration is met) is as interesting as what will happen to that point? This is, however, more speculative territory. Higher Education Institutions do not undertake financial planning (which is intimately related to student numbers this far into the future).

2.32 However **Figure 8a** sets out some longer term speculative assumptions, based on:

- Extrapolating the July 2015 forecast onwards from 2020/21 to 2028/29 at 4% and 3% per annum.
- Extrapolating the July 2015 forecast onwards from 2020/21 to 2028/29 by 500 students per annum (which works out about at 2.4% per annum, compound)
- Extrapolating the actual enrolment data to 2014/15 by 3.5% per annum
- A liner projection of growth since 1995/96

2.33 This exercise generates a fan of possibilities from 22,500 to 2028/29 (liner projection) to 26,400 (4% from 2020/21 assuming the aspiration to 2020/21 is reached). Projecting forward the 2014/15 number of students by 3.0% results in around 25,300 students. Somewhere between 23,500 and 24,500 students does not seem improbable as an aspiration to 2028/29 given the history of the University. Whether it is deliverable is a quite different matter, that relates not only to town planning matters but to a host of other variables, from visa restrictions, to funding arrangements, tuition fees and international competition.

2.34 The central assumption to 2020/21 is the black line (figs 8 and 8b) and the central assumption to 2028/29 is the orange line (fig 8b). Whilst the University might not currently need to look forward to 2029, the Development Plan does need to have an eye to the more distant future.

Table 3 July 2015 Forecasts

*TBC

	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	20/21	Change from 12/13	Change from 11/12
UNDERGRADUATES												
UG Intake	?	2,833	3,140	3,473	3,508	3,676	3,876	4,076	4,276	4,476	**1,643**	
Year on year change			*307*	*333*	*35*	*168*	*200*	*200*	*200*	*200*		
Total UG	?	9,812	10,350	11,122	11,845	12,564	13,166	13,635	14,242	14,952	**5,140**	
Year on year change			*538*	*772*	*723*	*719*	*602*	*469*	*607*	*710*		
Total UG on campus #	?	8,594	9,088	9,668	10,331	10,870	11,507	11,961	12,477	13,096	**4,502**	
Year on year change			*494*	*580*	*663*	*539*	*637*	*454*	*516*	*619*		
Total UG on campus %	?	87.6%	87.8%	86.9%	87.2%	86.5%	87.4%	87.7%	87.6%	87.6%	**0**	
TAUGHT POSTGRADUATES												
Full Time	?	1,230	1,226	1,103	1,103	1,103	1,103	1,103	1,103	1,103	**-127**	
Part Time	?	2,213	2,122	1,997	1,997	1,997	1,997	1,997	1,997	1,997	**-216**	
RESEARCH POSTGRADUATES												
Full Time	?	795	780	814	814	814	814	814	814	814	**19**	
Part Time	?	405	401	425	425	425	425	425	425	425	**20**	
Student population	14,000*	14,455	14,879	15,461	16,184	16,903	17,505	17,974	18,581	19,291	**4,836**	**5,291***
Students requiring accommodation* #	10,290*	10,619	11,094	11,585	12,248	12,787	13,424	13,878	14,394	15,013	**4,394**	**4,723***
Students requiring accommodation* %	73.5%*	73.5%	74.6%	74.9%	75.7%	75.6%	76.7%	77.2%	77.5%	77.8%		
Difference (requiring accommodation)		329*	*475*	*491*	*663*	*539*	*637*	*454*	*516*	*619*		

Figure 8a: July 2015 enrolment forecast (black line) set against previous forecasts

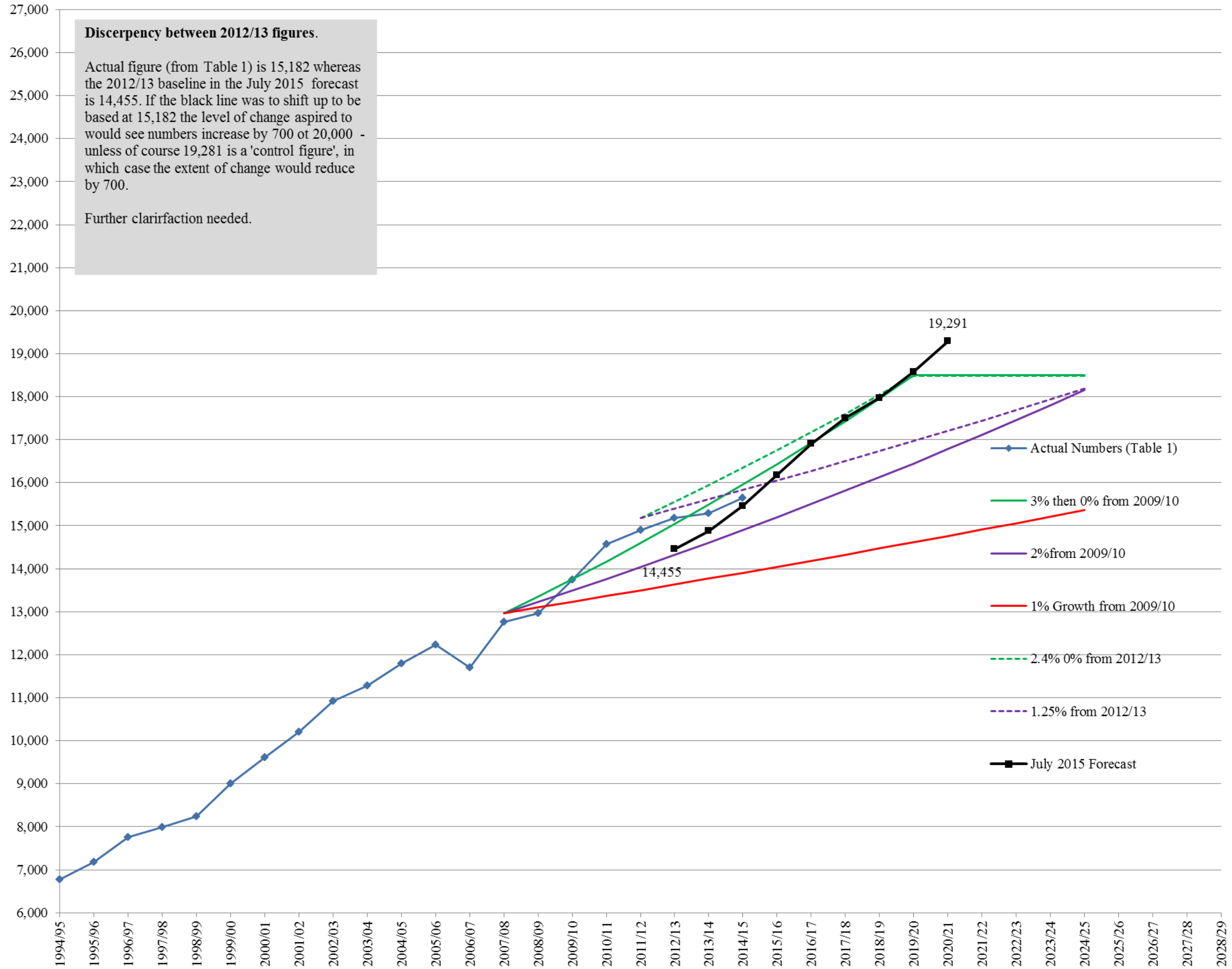
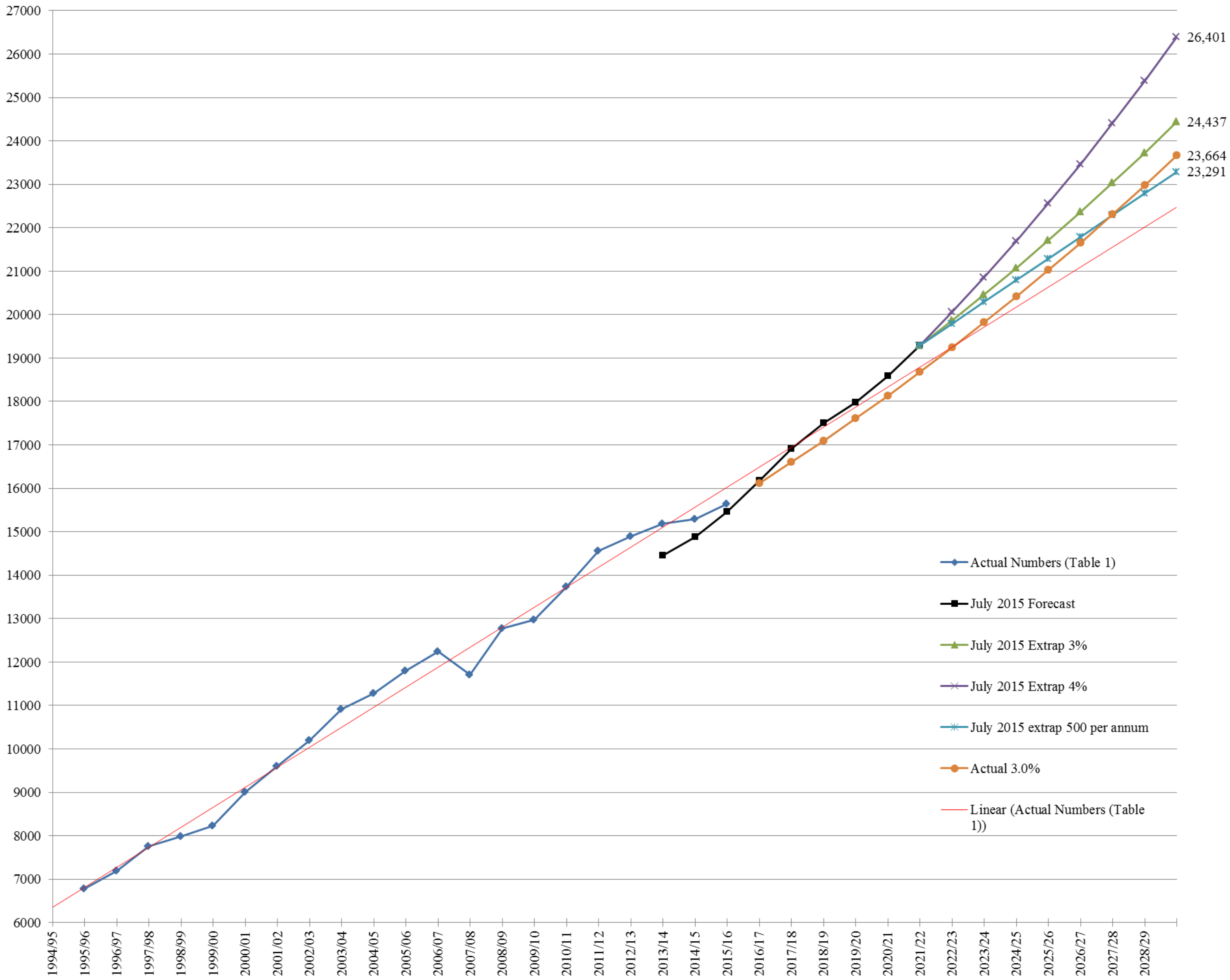


Figure 8b: Speculative longer term projections to 2029



Matching Demand with Supply

2.35 This section sets out the position as thought in 2012 (to retain an audit trail re the assumption in place during the Core Strategy process), followed by an updated 2015 version, based on the revised growth aspiration data (Table 3)

Position in 2012

2.36 **Table 3** shows what was considered to be most likely growth trajectory in 2012 (taking into account what is now known about non-affiliated in-city supply). This trajectory was one where the University of Bath reached its (then) anticipated future size sooner rather than later represented (by the green lines in Figure 8a). This does not mean that the University stated that it was going to cap itself indefinitely, rather it simply represents the upper limit of numbers it considered to a given time horizon of its choosing. The trajectory is based on the original accommodation multiplier of 0.65.

2.37 The 2009 masterplan (including subsequent updates) was said to be able to increase the number of bed spaces on-campus by 2,400[4] on the land identified for development (which was not all the non-green belt land at its disposal). This would have doubled the number of on-campus bedspaces from 2,452 to 4,852. Assuming a constant supply 895 off-campus bed spaces being maintained directly by UOB, and a share of additional private sector non-affiliated accommodation (of 263) , this would have resulted in a total supply of 6,010.

2.38 Overall, the on-campus capacity was sufficient to be able to meet the originally identified demand for 2,330 bedrooms. However, it was unlikely that this capacity was wholly deliverable to 2020/21. There was an expectation that whilst the Claverton campus should and could be the focus for the majority of new bedrooms to 2020/21(i.e. the Quads contributing 704 and a further phase contributing about 1,000) that there would be a need for some further in-city development to supplement supply this to tune of around 595 bedspaces (reducing to 332 once now known non-affiliated in-city supply of 263 is taking into account). If this did not happen then HMO growth (of around 157 dwellings, reducing to 91 once non-affiliated supply is taking into account) would present the sole option. It was also considered that this supply was 'out there' and could be permitted without prejudicing the realisation other strategic objectives for the city. In the event the potential sites that were on the radar at the time were secured by Bath Spa University, which, as set out later was beginning to shift from a strategy of consolidation to growth.

[4] Note this assumption is revised in the 2015 update (see para 2.44 onwards)

2.39 Table 3 shows that if the need for HMOs were to have grown that, in theory, this could almost be good (an even reversed in the longer term, if the University population was to stabilise after 2020/21 and if the much of or the full quantum of accommodation identified within the master plan was delivered. This is though quite a theoretical proposition as once a house is converted to HMO within the city, the subsequent availability of further dedicated managed accommodation at the Claverton campus may not cause students to switch to this as their preferred accommodation option (there are lifestyle, student experience and cost factors to take into account). Further the University would logically only build further phases if thought that it was necessary (not to redress any growth in HMOS since 2011/12).

2.40 The forecast rise in the HMO index to 2020/21 was 'relatively' minor (at less than 10 per annum) in the context of the annualised target for Bath (390 per annum). Nevertheless, as an alternative to relying on the HMO supply to 2020/12, the identified shortfall in the growth of accommodation to 2020/21 could have been sourced off-campus in new accommodation blocks. That was though achievable given the planning applications on the radar (and assuming that Bath Spa was not going to grow). In the event Bath Spa's plans changed and it secured some of the development that otherwise might have been available to students of the University of Bath.

2.41 In addition to these observations, there was a risk that too much off-campus delivery between 2011/12 and 2020/21 (i.e. more than around 332 bedrooms available to UoB students) could have harmed the implementation of tall of the next on-campus phase of 1,000 bedrooms. There was also some risk that a short term off-campus solutions (dedicated or in HMOs) would undermine-the full delivery of on-campus capacity during the plan period. If accommodation needs were met off-campus there was considered to be no incentive for the University to build on campus. Whilst off-campus solutions in the short term may have affected the implementation on the on-campus strategy for the whole plan period, there was nevertheless a case for meeting the demand arising at 2020/21, by 2020/21 with dedicated accommodation, thereby reducing the reliance on HMO growth, and the need for replacement housing provision.

2.42 Finally, there was a separate but associated risk to the delivery of the other land uses if dedicated student accommodation blocks were to claim too many sites in the city.

University of Bath - Demand and Supply for Student Accommodation 2011-2026 (2012 conclusions)

Table 3: Showing December snapshot growth to 2013/14 followed by a 2.4% growth per annum projection to 2021, with stability thereafter

	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	master plan horizon	2011-26
Total Students	14,902	15,182	15,660	16,036	16,421	16,815	17,218	17,632	18,055	18,488	18,488	18,488	18,488	18,488	18,488		3,586
Total annual growth		*280*	*478*	*376*	*385*	*394*	*404*	*413*	*423*	*433*	*0*	*0*	*0*	*0*	*0*		
Housing Need in Bath (65%)	**9,686**	**9,868**	**10,179**	**10,423**	**10,673**	**10,930**	**11,192**	**11,461**	**11,736**	**12,017**	**12,017**	**12,017**	**12,017**	**12,017**	**12,017**		2,331
Need annual growth		182	311	244	250	256	262	269	275	282	0	0	0	0	0		
Uni Beds On campus	2,452	2,452	2,452	3,156	3,156	3,156	3,406	3,406	3,406	4,156	4,156	4,156	4,852	4,852	4,852		2,400
Uni Beds Off campus	895	895	895	895	895	895	895	895	895	895	895	895	895	895	895		0
Uni Beds Total	3,347	3,347	3,347	4,051	4,051	4,051	4,301	4,301	5,051	5,051	5,051	5,051	5,747	5,747	5,747		2,400
Non-affiliated Private Accommodation	0	0	0	24	88	224	263	263	263	263	263	263	263	263	263		
All beds total	3,347	3,347	3,347	4,075	4,139	4,275	4,564	4,564	5,314	5,314	5,314	5,314	6,010	6,010	6,010		
Residual Private Sector Beds Demand	6,339	6,521	6,832	6,348	6,534	6,655	6,628	6,897	6,422	6,703	6,703	6,703	6,007	6,007	6,007		-332
Residual Private Beds Change compared to 2011/12		182	493	9	195	315	289	557	82	364	364	364	-332	-332	-332		
Student HMOs needed	1,585	1,630	1,708	1,587	1,634	1,664	1,657	1,724	1,605	1,676	1,676	1,676	1,502	1,502	1,502		-83
Change in HMOs compared to 2011		46	123	2	49	79	72	139	21	91	91	91	-83	-83	-83		
HMO Index	100	102.9	107.8	100.1	103.1	105.0	104.6	108.8	101.3	105.7	105.7	105.7	94.8	94.8	94.8		-5.2

*2.4% per annum from 2013/14 produces the same result as 3% per annum from 2009

Updated Position in 2015 for the period 2011/12 - 2020/21

Assessment to 2020/21

2.43 The first 704 bedspaces within the 2009 masterplan (The Quads') were completed in time for the 2014/15 academic year. However, discussions with the University in July 2015 suggest than the remaining capacity on the residential areas identified in the master plan (2014 summary update) is not more than around 1,000.This is a draft finding, and subject to formal comment form the University, but the capacity is probably nearer 1,700 (including The Quads) rather than 2,400.-This relates solely to area the areas identified in the current masterplan – not all developable (non green belt) land

2.44 Thus, the 704 bedrooms built on-campus (plus 263[5] private sector bedrooms that have been built or permitted in the city) can be taken into account against the aspired to need for of 4,723 bedrooms between 2011/12 and 2020/21, reducing this to 3,756. This number can be further reduced to 2,756 based on the additional capacity of 1,000 available within the scope of the current campus masterplan and making the assumption that this can/will be delivered.

2.45 That residual number equates to an increase in the demand for HMOs of around 700 (unless there are also extensions to current HMOs) if the University was to achieve its aspirations. That is unless additional sources of supply can be secured in the city (beyond that already built or permitted). This though has an opportunity cost that may not be acceptable as developable land becomes an ever scarcer and valuable resource. The Core Strategy (by Policy B5) prioritises the accommodation of other uses (normal housing, office, industrial and retail) within Enterprise Area and on this basis the Placemaking Plan may not be able to allocate any land for student accommodation without a cost to the delivery of these other uses. Nevertheless there is always scope for windfall potential to come forward on sites not identified and earmarked/reserved within the Placemaking Plan. Such supply is though likely to be limited and Bath Spa University or its students will compete for it.

2.46 Further, there can be no guarantee that HMOs will be able to grow at the necessary rate, given the Article 4 Direction (which can be changed in its application via the accompanying SPD). A number of streets are now above the SPD threshold, the

[5] This is the University's assumed share of 526

headroom for growth in adjoining areas is limited, and it is uncertain whether this sector would colonise new areas (different house types, frequency of coming to market and different prices points), at all or at the required rate. Further, Bath Spa's growing numbers and aspirations will compete for what becomes available.

2.47 The accommodation capacity identified within the University's 2014 masterplan update does not represent the maximum capacity of the Universities land holdings as the masterplan capacity focuses on areas around the core of the existing estate. There is more (undeveloped) land that the University controls, most notable land removed from the Green Belt in 2007 (which has yet to receive any master planning attention re development). This land resource would enable the University to provide for more of the needs that it would generate and would enable it to grow without negative impacts on the realisation of other uses within the city. However, it seems unlikely that such additional capacity would be built out by 2020/21 (on past rates of development) in addition to the 1,000 bedrooms already identified between now and 2020. Therefore it may take longer for the University to reach its 2020/21 aspiration based on it's current model of financing and building its own accommodation on campus.

<u>Assessment to beyond 2020/21 to 2028/29</u>

2.48 This is more speculative and is clearly dependent on what happens to 2021/21. Table 4b is the continuation of Table 4a and is based on the orange line in Figure 8b (3% growth form 2014/15) to illustrate the sort of additional requirements that would arise if aspirations to 2021 were achieved and if a subsequent new aspiration was put in place that continued the long term tend (or thereabouts) . On that basis a figure in the low to mid 20,000s would be likely. Table 4b assumes 24,500 students by 2029 (5,000 more than 2020/21 and a need for 4,000 more bedrooms). It also assumes no further dedicated accommodation provision to that achieved in Table 4a. In reality there may be scope for further supply (less so in the city re Core Strategy Policy B5 and more so on-campus (albeit perhaps only to address the aspiration to 2021 either by that date or later on). Yet further aspiration beyond the numbers for 2021, that led to demand in Bath, may not be able to be accommodated in yet further dedicated accommodation blocks. Green Belt land within the estate would come under scrutiny, with environmental and other implications. A wholly HMO led strategy would require 1,000 dwellings and, if the market were able to respond that would see students displace non-students within the city to a very significant degree, which bring the Article 4 Direction and it application to the fore again. Therefore a higher proportion of students may need to be hosing on-campus that has historically been the case, if aspirations are to be met.

Table 4a University of Bath, Demand and Supply for Student Accommodation 2011/12-2020/21 (2015 conclusions)

Table 4a assumes no further dedicated accommodation provision on-campus or in-city) to that already accounted for achieved by 2020/21. The resultant number of new HMOS required is therefore 689 under this scenario (see 2.45 – 2.47)

	11/12	**12/13**	**13/14**	**14/15**	**15/16**	**16/17**	**17/18**	**18/19**	**19/20**	**20/21**	**Change**
Total Students	14,000	14,455	14,879	15,461	16,184	16,903	17,505	17,974	18,581	19,291	**5,291**
Total annual growth		*455*	*424*	*582*	*723*	*719*	*602*	*469*	*607*	*710*	
Housing Need in Bath	*10,290*	10,619	11,094	11,585	12,248	12,787	13,424	13,878	14,394	15,013	**4,723**
Need annual growth		*329*	*475*	*491*	*663*	*539*	*637*	*454*	*516*	*619*	
Housing Need in Bath % of Total Students	73.5%	73.5%	74.6%	74.9%	75.7%	75.6%	76.7%	77.2%	77.5%	77.8%	**4.3%**
Uni Beds On campus	2,452	2,452	2,452	3,156	3,156	3,156	3,406	3,406	3,406	4,156	**1,704**
Uni Beds Off campus	895	895	895	895	895	895	895	895	895	895	
Uni Bed Total	3,347	3,347	3,347	4,051	4,051	4,051	4,301	4,301	4,301	5,051	**1,704**
Non-affiliated Private Accommodation	0	0	0	24	88	224	263	263	263	263	
All Beds Total	3,347	3,347	3,347	4,075	4,139	4,275	4,564	4,564	4,564	5,314	
Residual Private Sector Beds Demand	6,943	7,272	7,747	7,510	8,109	8,512	8,860	9,314	9,830	9,699	**2,756**
Residual Private Beds Demand Change		329	475	-237	599	403	348	454	516	-131	
Equivalent Student HMOs needed	1,736	1,818	1,937	1,878	2,027	2,128	2,215	2,329	2,458	2,425	**689**
Yearly Change in HMOs needed		82	119	-59	150	101	87	114	129	-33	

Note: For a breakdown of the numbers under non-affiliated private accommodation, see page 46

Table 4b University of Bath, Demand and Supply for Student Accommodation 2020/21/208/29 (2015 conclusions)

	20/21	21/22	22/23	23/24	24/25	25/26	26/27	27/28	28/29	Chnage
Total Students	19,291	19,870	20,466	21,080	21,712	22,364	23,034	23,725	24,437	**5,146**
Total annual growth		*579*	*596*	*614*	*632*	*651*	*671*	*691*	*712*	
Houisng Need in Bath	15,013	15,459	15,922	16,400	16,892	17,399	17,921	18,458	19,012	**3,999**
Need annual growth		*446*	*464*	*478*	*492*	*507*	*522*	*538*	*554*	
Housing Need in Bath % of Total Students	77.8%	77.8%	77.8%	77.8%	77.8%	77.8%	77.8%	77.8%	77.8%	**0**
Uni Beds On campus	4,156	4,156	4,156	4,156	4,156	4,156	4,156	4,156	4,156	**0**
Uni Beds Off campus	895	895	895	895	895	895	895	895	895	**0**
Uni Bed Total	5,051	5,051	5,051	5,051	5,051	5,051	5,051	5,051	5,051	**0**
Non-affiliated Private Accommodation	263	263	263	263	263	263	263	263	263	**0**
All Beds Total	5,314	5,314	5,314	5,314	5,314	5,314	5,314	5,314	5,314	**0**
Residual Private Sector Beds Demand	9,699	10,145	10,608	11,086	11,578	12,085	12,607	13,144	13,698	**3,999**
Residual Private Beds Demand Change		446	464	478	492	507	522	538	554	
Equivalent Student HMOs needed	2,425	2,536	2,652	2,772	2,895	3,021	3,152	3,286	3,425	**1,000**
Yearly Change in HMOs needed		111	116	119	123	127	130	134	138	

Bath Spa University

Growth in Enrolment

3.1 **Table 5** and **Figure 9** set out how the number of students enrolled at Bath Spa University has increased since the mid 1990's. For the 2014/15 academic year there were a total of 7,379 enrolled students. Numbers peaked in 2010/11 but have declined by about 1,760 since then due to a reduction in part-time enrolment, particularly in respect of postgraduates. Despite the contraction in overall numbers full-time enrolment has been relatively steady of late, at around 6,000, but it increased to 6,310 for 2014/15[6]. Statistics for 2015/16 have yet to be released, but another significant increase is expected. Around 86% of enrolment is related to full-time modes of study (up from 66% in 2006/07). The split between full-time and part-time enrolment (in association with other factors) impacts on the need for student accommodation.

3.2 **Figure10a** (to be added) shows the growth rate each year for total enrolment. It also illustrates that the long term compound annual rate of growth has been 5.4% (red dotted line), whereas the most recent 5 year and 3 year rates have been -3.4%% and -4.8% (green and purple dotted lines).

3.3 **Figure 10b** (to be added) shows that the comparable figures for full-time undergraduates (the primary mode of study) are 5.3% (long term) 0.4% and -1.0% for the last 3 and 5 years. A ten year trend is also presented which is around 3% per annum

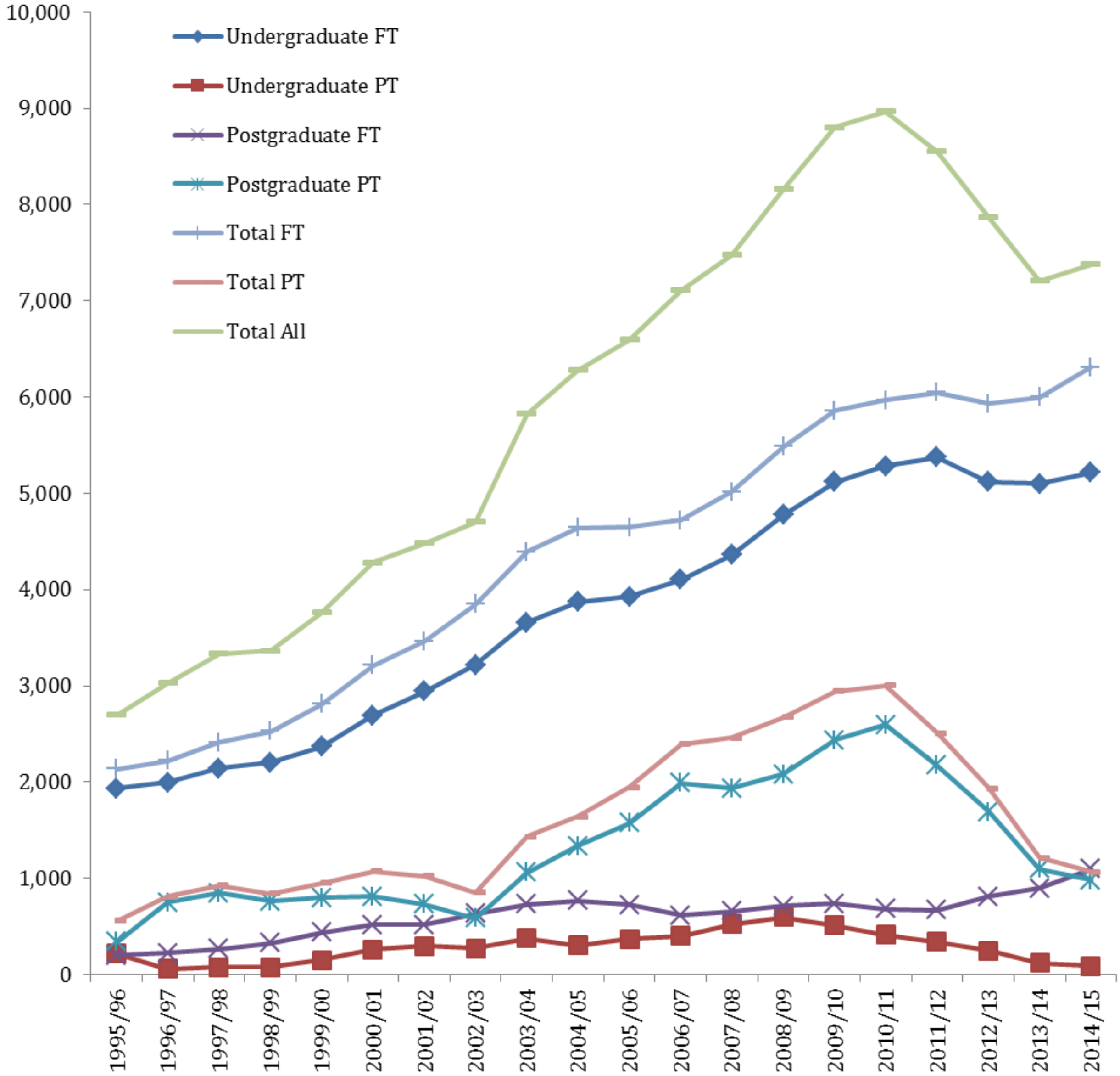
[6] Perhaps in response to the relaxation of the recruitment cap prior to its removal in 2015/16

Table 5: Bath Spa University - Student Numbers (HESA)

	Undergraduate			Postgraduate					
	FT	PT	Total	FT	PT	Total	Tot FT	Tot PT	Total
1995/96	1,937	219	2,156	200	340	540	**2,137**	**559**	**2,696**
1996/97	1,997	60	2,057	225	747	972	**2,222**	**807**	**3,029**
1997/98	2,144	76	2,220	264	847	1,111	**2,408**	**923**	**3,331**
1998/99	2,201	75	2,276	325	764	1,089	**2,526**	**839**	**3,365**
1999/00	2,370	150	2,520	440	800	1,240	**2,810**	**950**	**3,760**
2000/01	2,695	260	2,955	515	810	1,325	**3,210**	**1,070**	**4,280**
2001/02	2,945	295	3,240	515	730	1,245	**3,460**	**1,025**	**4,485**
2002/03	3,220	270	3,490	630	585	1,215	**3,850**	**855**	**4,705**
2003/04	3,660	375	4,035	730	1,060	1,790	**4,390**	**1,435**	**5,825**
2004/05	3,870	305	4,175	770	1,335	2,105	**4,640**	**1,640**	**6,280**
2005/06	3,925	370	4,295	725	1,575	2,300	**4,650**	**1,945**	**6,595**
2006/07	4,105	400	4,505	615	1,990	2,605	**4,720**	**2,390**	**7,110**
2007/08	4,360	525	4,885	655	1,935	2,590	**5,015**	**2,460**	**7,475**
2008/09	4,775	595	5,370	710	2,080	2,790	**5,485**	**2,675**	**8,160**
2009/10	5,120	510	5,630	735	2,435	3,170	**5,855**	**2,945**	**8,800**
2010/11	5,285	410	5,695	680	2,595	3,275	**5,965**	**3,005**	**8,970**
2011/12	5,375	340	5,715	670	2,170	2,840	**6,045**	**2,510**	**8,555**
2012/13	5,120	245	5,365	810	1,690	2,500	**5,930**	**1,935**	**7,865**
2013/14	5,100	120	5,220	895	1,095	1,990	**5,995**	**1,215**	**7,210**
2014/15*	5,214	89	5303	1,096	980	2,076	**6,310**	**1,069**	**7,379**

*Provided by Bath Spa in December 2015 but not yet published by HESA

Figure 9: Bath Spa University - Student Numbers 1995/96 – 2014/15



Bath Spa University - Demand and Supply for Living Accommodation (2011/12 - 14/15)

3.4 Since the preparation of the Core Strategy the Council's assumption for Bath Spa has been that the number of full-time students is a reasonable proxy for the number of students requiring accommodation. The term proxy is used as whilst some full-time students would not be in need of accommodation in the city it was likely that some part-time students would be. However, whereas full-time students were 66% of total enrolment in 2010/11 (the peak of enrolment), they now represent 85%. This accentuates the importance of this assumption. For 2014/15 there were 6,310 full-time students (up from 6,045 in 2011/12) but may be some nuances related to mode of study that reduce this figure. For example, in respect of the living arrangements of full-time PGCE students, there may be a greater propensity to live outside Bath's HMO sector.

3.5 An alternative assumption would be to use full-time undergraduate students as a proxy for the number of students requiring accommodation the city. Whereas full-time undergraduates represented 59% (5,375) of total enrolment in 2010/11 they now represent 70% (5,214).

2.49 In 2011/12 Bath Spa University maintained or had agreements in place for 1,103 bedrooms (on and off campus). For the 2014/15 academic year 'The Gardens' were opened on-campus, increasing this stock to 1,664 bedrooms. In addition there have been a number of unaffiliated private sector developments that are available to any student, whatever institution they attend. It is not possible to state how many Bath Spa students have secured bedrooms in these developments (and this figure will change each year). Therefore an assumption is made that each set of students claim a half share of the available bedrooms. This increases supply for Bath Spa at 2014/15 to 1,904

Table 6a: Bath Spa University Study Bedrooms 2014/15

Accommodation	**Beds**	**Location**
Lakeside	307*	Newton Park Campus
The Gardens (2014)	561	Newton Park Campus
Campus sub total	***868***	
Waterside Court, Lower Bristol Road (2004)	316	City
Charlton Court, Lower Bristol Road (2009)	266	City
Bankside, Lansdown	43	City
Homestay Units	50	City
Bath Spa/Unite City sub-total	**675**	
Other City subtotal (post 2011)	**263**	City
Total	**1,806**	

* This figure was 388 in 2011/12 but has since been reduced due to the development of The Commons

2.50 It should be noted that this table set out the situation at 2014/15 to enable comparison with the most recently available data on student numbers. It does not take into account pipeline sites available from 2015/16 and 2016/17. The University has also secured a further 738 bedrooms which will be available from 2015/16 and 2016.17 (hence why they are not taken into account at this stage i.e. in relation to known student numbers). Nevertheless, they do feature in future projections of demand and supply. The sites are Twerton Mill (266) and Green Park Road (461). The Twerton Mill site actually comprises 327 bedrooms but not all have been secured by Bath Spa. The remainder (61) are available to any student.

2.51 **Table 6b** shows the supply identified in Table 7 as able to cater for 17.8% of all full-time need in 2011 and 28.8 % in 2014/15. Whereas bed space demand has increased by 265, the number of bedspaces has increased by 743. This means that unmet need will have decreased by around 478 (around 120 HMOs).

Table 6b Demand and Supply (all full-time students)

	2011/12	**2014/15**	**Change**
Demand	6,045	6,310	+265
Supply	1,074	1,806	+732
Supply as % of Demand	17.8%	28.6%	10.8%
Residual #	4,971	4,504	-467

2.52 **Table 6c** shows the supply identified in Table 6a as able to cater for 20% of full-time undergraduate need in 2011 and 34.8% in 2014/15. Whereas bed space demand has decreased by 161, the number of bedspaces has increased by 743. This means that unmet need will have decreased by around 904 (around 226 HMOs).

Table 6c Demand and Supply (full-time undergraduate students)

	2011/12	**2014/15**	**Change**
Demand	5,375	5,214	-161
Supply	1,074	1,806	+32
Supply as % of Demand	20%	34.6%	14.8%
Deficit #	4,301	3,408	-904

Bath Spa University – past and current growth plans

<u>2010 Strategic Framework and Newton Park Master Plan</u>

3.6 In 2010 Bath Spa University prepared a Strategic Framework to identify its academic and accommodation deficiencies and requirements and aspirations for the future. This also set out development potential and proposals for each of the sites that it occupies. This led to the production of a Development Framework and subsequent Campus Masterplan for the period 2010-2030 which set out three phases of development. The masterplan was written, and planning applications were submitted (in 2010 and 2012) on the premise of the stabilisation of student numbers. This was of course before the announcement relaxing and then removing cap on recruitment was. The first two phases have since been implemented.

Phase 1 relates to **The Commons Building**, which involved the redevelopment of 2,300 m^2 of administrative space and student accommodation (82 bedrooms) within in the northern part of the campus to achieve 8,500 m^2 of academic space (net increase of around 6,200 sq.m.).This was permitted in August 2011 and completed opened in June 2014 (ref: 10/04747/FUL).

Phase 2 – relates to **561 student bedrooms** (net change of 479) to the south of the campus (opened September 2014) and the associated removal, replacement or disposal of unsympathetic buildings and facilities to enhance the significance of heritage assets (ref: 12/02141/FUL).

Phase 3 - **Residential redevelopment** (at the north of the campus), an intended future phase that will largely **replace the existing stock** with perhaps only a modest net gain. For now though 1:1 replacement is assumed. There may be some flux to supply in the future as old stock is demolished and new stock replaces it.

<u>2014 Indications of growth in international students (Shorelight/ Bath Spa Global)</u>

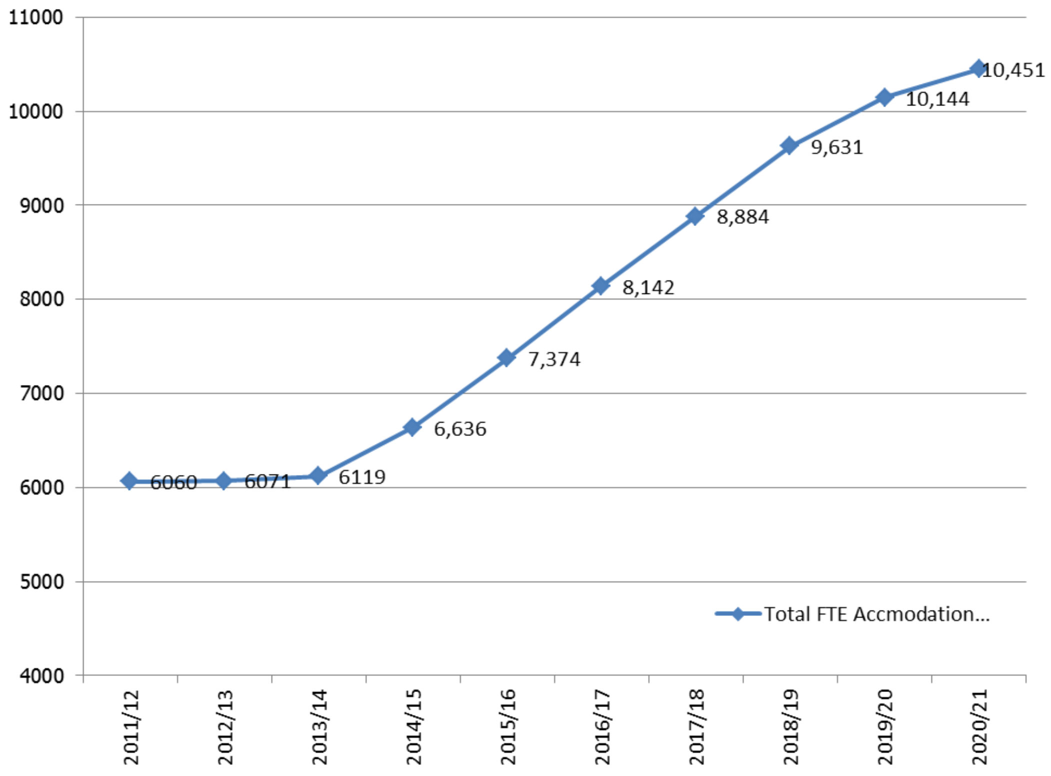
3.7 In 2014 information was released in respect of a significant new programme to grow enrolment. In the first part of 2014 it was announced that Bath Spa had embarked on a programme to attract 2,000 international students (mostly from the US) in association with 'Shorelight Education'. Subsequently, following a request for clarification from the LPA, the Director of International Relations identified that a reasonable assumption would be about 500 international students in the 5 years from 2014/15, rising to up to 1,000 international students in the years following, and that these would be net additional students rather than replacing domestic students. Up to this point there was no direct indication of any increase from domestic sources.

<u>2015 (March and July) Representations and supplementary data in respect of the Placemaking Plan Options Consultation</u>

<u>Student Numbers</u>

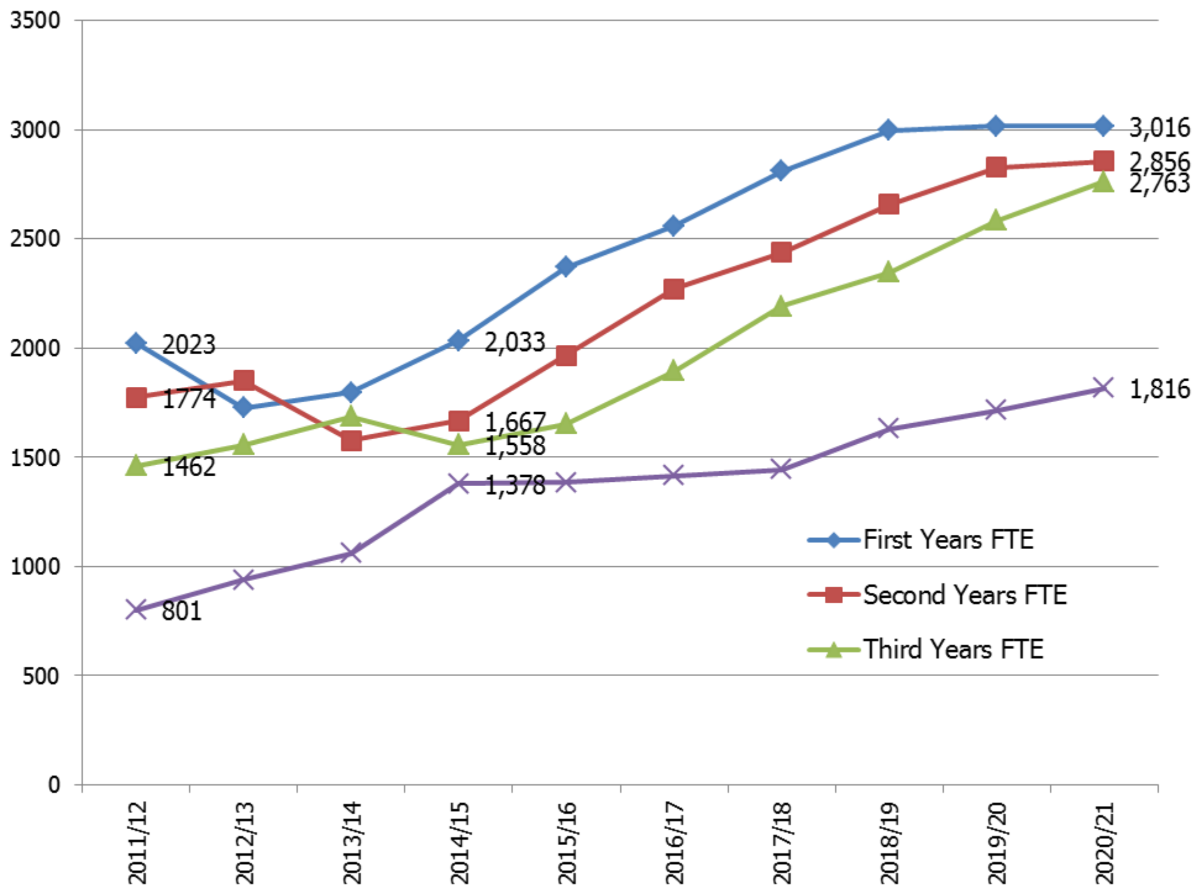
3.8 Figures 10 and 11 set out Baths' Spa aspirations for growth as expressed between March and July 2015. This includes the Bath Spa Global Project. Some 4,391 more FTEs are aspired to from 2011 and 3,815 from 2014/15. This 6.3% per annum growth from 2011/12 and 7.9% per annum growth from 2014./15 The long term average rate of growth for total actual students is 5% and the 10 year trend is 3%[7] The split between full time and part time mode of study isn't given and thus it is difficult to assess (solely form this data) the accommodation needs that this aspiration could generate. Around 86% of current enrolment is related to full-time modes of study (up from 66% in 2006/07). It is well documented that part-time enrolment has been falling across England in recent years, and therefore the main/only driver of growth is likely to be full-time students

Figure 10 Growth aspirations (total) submitted as part of Placemaking Plan Options Consultation



[7] The may therefore major teaching space and timetabling issues to overcome, as well as housing issues

Figure 11Growth aspirations (by year group) submitted as part of Placemaking Plan Options Consultation



<u>Accommodation Needs</u>

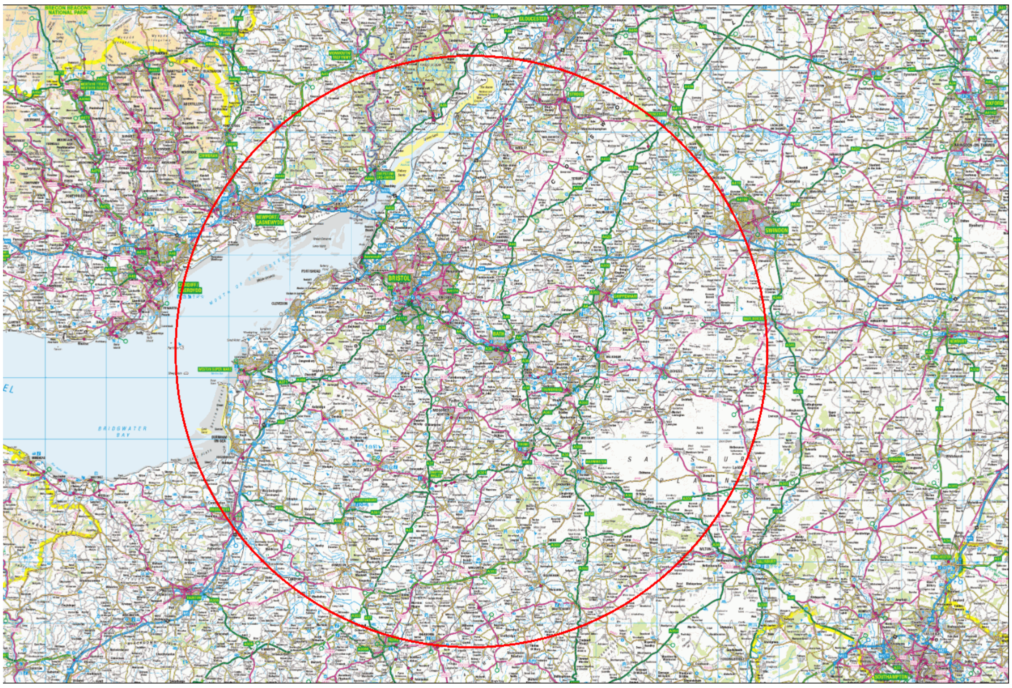
3.9 Also included in the representations was a table setting out the requirement for student accommodation based on the above numbers, except that it is slightly false in that it focused on the accommodation that is needed to enable first year growth rather than all growth. This is set out in Table 7. It is not clear if this is FTEs or actual students. The Council suspect that it is for actual students. It shows that priority (first year) housing requirements would increase by 1,005 from 2014/15 to 2020/21 but that this will have taken place by 2018/19, as there is no increase in in-take after 2018/19. The data has no row for full-time Domestic and EU postgraduates (c.1000) and thus seem to assume that students not being taught in Bath (i.e. at Corsham) won't generate housing needs in Bath. That needs further justification.

3.10 Total needs are of course greater than first year needs. The increasing intake of Home and EU undergraduate students taught in Bath is 403 by 2018/19, but this will generate total of three times that by 2020/21 as the students move through their three years of study. Total change in need therefore more likely to be 1,209. Likewise the increase in 120 overseas undergraduates will generate a need for 360 bedspaces by 2020/21. Postgraduate courses are normally one year and thus the overseas increase to 30 does not need further multiplication. There is an apparent absence of any current or increasing need for Home & EU postgraduates even though there are currently around 1,000 FT and 1,000 PT registrations. That needs further justification in respect of current and future numbers. The Bath Spa Global Project is understood to be a three year mode of study and therefore the 486 figure at 2018/19 needs to be multiplied by 3 to generate a total demand figure for 2020/21 of 1,458.

3.11 On this basis Table 7 generates a total need for 3,057 more bedspaces between 2014/15 and 2020/21. Somehow that must reconcile with the growth 3,815 FTEs from 2014/15.

3.12 The numbers produced in the Table 7 show the total required if all first year students applied and are eligible for BSU controlled accommodation. The University will not allow first year students to be allocated BSU accommodation if their home address is within a 30 mile radius of the Campus.

Figure 12: 30 mile radius around Newton Park Campus



3.13 In 2014/15 the University allocated 1558 beds, 30 of which were acquired through private landlords. According to BSU *Therefore 633 students* (presumably first years i.e. 29% of first years excluding Home EU undergrads) *either did not require BSU controlled accommodation or were not eligible.* BSU states that *if the number of students not eligible (633) remains constant the table* (Table 7) *does identify with the acquisition of Green Park House and the* *agreement with Twerton Mills the University will still require as a minimum an additional 270 bed spaces for first years by September 2020*[8]*.*

3.14 The use of the word as a minimum is important here, as just because first year students are not eligible within 30 miles, is does not mean that they will choose to live at home in or outside Bath. They may simply look for accommodation options in the HMO sector in Bath from year 1, rather than from year 2.

<u>December 2015</u>

3.15 The University has indicated that the Bath Spa Global aspiration has either been curtailed (or the aspiration is the same but it is not thought to be deliverable to the level wished for). If this is so, it is important as it will relate to full-time study assumptions and consequent accommodation needs in Bath.

[8] Acknowledgement that these blocks were ultimately secured too enable growth – not to improve the existing situation (whatever the immediate/short term effect).

Table 7 Year 1 Accommodation Needs 2014/15 – 2020/21

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21		Change
YR1 Home and EU Undergraduates	1,907	2,150	2,150	2,230	2,310	2,310	2,310		403
Undergraduates taught at other colleges	-170	-170	-170	-170	-170	-170	-170		0
Total Home EU & YR 1 intake at BSU campuses	1,737	1,980	1,980	2,060	2,140	2,140	2,140		403
YR1 Overseas Undergraduates	100	120	160	180	200	220	220		120
Overseas Postgraduates	320	320	320	320	330	340	350		30
Total YR1 Overseas and Postgraduates	420	440	480	500	530	560	570		150
YR1 Bath Spa Global	34	100	250	400	486	486	486		452
TOTAL (YEAR 1) DEMAND	**2,191**	**2,520**	**2,710**	**2,960**	**3,156**	**3,186**	**3,196**		**1,005**
~~TOTAL BSU BEDS*~~	~~1,558~~	~~1,835~~	~~2,296~~	~~2,296~~	~~2,296~~	~~2,296~~	~~2,296~~		~~738~~
~~Year 1 GAP~~	~~-633~~	~~-685~~	~~-414~~	~~-664~~	~~-860~~	~~-890~~	~~-900~~		~~-267~~

The supply data is struck out of this section of the report deals with primarily projections of accommodation demand rather than supply. Nevertheless to the whole table (including supply) is presented show what was submitted as a representation to the Placemaking Plan Options consultation.

Whilst the BSU controlled bed numbers are correct there is now row to represent the non-affiliated bedspaces that have been built since 2014/15

Forecasts of Demand and Supply: Analysis of Table 8

Core Strategy Assumptions

3.16 Prior to setting out current observations it should be noted that at the time of the Core Strategy, zero growth was assumed and therefore the (then known) 561(gross) and (480) net on-campus bedrooms re the development of the Gardens would have a net positive effect on the demand for HMOs to the tune of around 120.

Current Assumptions

3.17 Following Government's December 2013 announcement that the cap on recruitment would be relaxed and then lifted, throughout 2014 information was progressively gathered on new international recruitment and all new recruitment, culminating in the provision of data between March and July 2015.

3.18 Tables 8a -8c sets out the impact of the March-July 2015 growth aspirations (if this were to be realised) on the demands for study bedrooms to 2020/21. Table 8a utilises the conclusions of Table 7 and paragraph 3.11 (re 3057 bedrooms between 2014/15 to 202/21.

A: Using estimates of total full-time change as a proxy for demand change

See Tables 8a and 8b

3.19 As previously stated the mode of study split between of the 4,391 aspired to FTE growth between 2011/12 and 2020/21 has not yet been explicitly presented by the University. However, it is known that the full-time share of enrolment has been increasing recently from 66% in 2006/07 to 83% in 2013/14 and 85% in 2014/15. This is more to do with a contraction of part-time numbers than a major boost to full time numbers. There is clearly scope for a high proportion of new FTEs to be new full-time students.

Table 8a

3.20 If this share to be a new 'norm' then an assumption could be made that, at the margin, 83% of the increase in FTEs might study on a full-time basis. This would generate c.3,650 more full-time students. The residual c.750 FTEs would be made up of a number more than that in terms of actual students.

3.21 If this is so, and if aspirations are achieved then full-time numbers could increase from 6,045 in 2011/12 to 9,695 in 2020/21. It is known from Table 5 that the period 2011/12 to 20145 generated 245 fulltime students, thus the residual demand to 2020/1 is 3,405.

3.22 It is also known that the number of on-campus study bedrooms has increased by 480 (net) since 2011/12. Further, another 738 study bedrooms at Twerton Mill (277) and Green Park House 461) will become available from 2015/16 and 2016/17. In addition it is reasonable to assume that Bath Spa students will be able to access some of the non-affiliated study bedrooms that have been built, are under construction or have been permitted. A figure of 263 would represent a half share of those bedrooms. In total identified supply is around 1,481.

3.23 If additional demand was to reach 3,650 by 2020/21 or some other date there would be an additional deficit of 2,169 study bedrooms. That is equivalent to 542 HMOs.

Table 8b

3.24 The term 'some other date' is introduced as for full-time students to grow by 3,650 by 2020/21 would represent +7% per annum growth from 2014/15 (whereas the historic and 10 year trend is only 5% and 3%). If growth was a more conservative 3% form 2014/15 it would take until 2028/29 to reach 3,650 more full-time students (still within the plan period). However, there would be more positive effects on HMO demand in the short to medium to 202/21 as demand would only increase by a 1,533 and unmet demand would only generate a need for 13 more HMOs to 2020/21.

<u>B: Using estimates of undergraduate full-time change as a proxy for demand change</u>

Table 9a

3.25 Following on form 3.19 and 3.20, 83% of students were full-time in 2013/14, and of these 85% were undergraduates. Applied to 3,650 FTEs out of 4,391 FTEs this generates 3,100 more full-time undergraduates from 2014/15.

3.26 If this is so, and if aspirations are achieved then full-time undergraduates numbers could increase from 5,214 in 2014/15 to 8,314 in 2020/21. It is known from Table 5 that the period 2011/12 to 2014/15 saw a contraction of full-time 161 undergraduates and this is taken into account in the demand and supply position for those years.

3.27 As in 3.22 an additional supply of 1,481 study bedrooms can be identified.

3.28 If additional demand was to reach 2,945 (take in to account losses from 2011/12 to 2014/15) by 2020/21, or some other date there would be an additional deficit of 1,464 study bedrooms. That is equivalent to 366 HMOs.

Table 9b

3.29 The term 'some other date' is again used as for full-time students to grow by c. 3000 by 2020/21 would represent +8% per annum growth from 2014/15 (whereas the historic and 10 year trend is only 5% and 3%). If growth was a more conservative 3.54% form 2014/15 it would take until 2028/29 to reach c. 3,000 more full-time undergraduate (still within the plan period). However, there would be more positive effects on HMO demand well into the 2020s

C: Based on paragraph 3.11 and Table 7

3.30 Table 7 (once assessed and converted in needs for all years) generated a need for 3,057 bedrooms between 2011/12 and 2020/21. Thus the outputs are essentially the same as set out in Table 9a and no additional table is supply and demand is needed /presented.

Conclusion

3.31 In summary unmet needs could be in the order of 2,100 to 1,500 bedspaces sooner (to 2020/21) or later (to 2028/29) depending on which scenario is looked at. That is equivalent to around 540 to 370 HMOs. Tables 8a and 9a generate an uplift to 2020/21, whereas the 'b' tables generate uplift after 2020/21 – and well into the 2020s in 9b.

3.32 The aspiration is 4391 more FTEs to 2020/21. It could of course take longer to achieve the aspiration.

Table 8a: Bath Spa University, Demand and Supply for Student Accommodation – using full-time enrolment as a proxy for demand and assuming 3,650 more full-time students to <u>2020/21</u>

	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	Change
Total Full-Time Students (Demand)	6,045	5,930	5,995	6,310	6,778	7,281	7,821	8,402	9,025	9,695	9,695	9,695	9,695	9,695	9,695	9,695	9,695	9,695	**3,650**
Total annual growth		*-115*	*65*	*315*	*468*	*503*	*540*	*580*	*623*	*670*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	
Uni Beds On campus	388	307	307	868	868	868	868	868	868	868	868	868	868	868	868	868	868	868	**480**
Uni Beds Off campus	686	686	686	686	963	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	**738**
Uni Beds Total	**1,074**	**993**	**993**	**1,554**	**1,831**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**1,218**
Non-affiliated accomodation	0	0	0	24	88	244	263	263	263	263	263	263	263	263	263	263	263	263	**263**
Total Beds	**1,074**	**993**	**993**	**1,578**	**1,919**	**2,536**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**1,481**
Residual Bedrooms Needed	4,971	4,937	5,002	4,732	4,859	4,745	5,266	5,847	6,470	7,140	7,140	7,140	7,140	7,140	7,140	7,140	7,140	7,140	
Student HMOs needed	1,243	1,234	1,251	1,183	1,215	1,186	1,317	1,462	1,618	1,785	1,785	1,785	1,785	1,785	1,785	1,785	1,785	1,785	**542**
Yearly change in HMO Demand		-9	16	-68	32	-29	130	145	156	167	0	0	0	0	0	0	0	0	
Cumualtive change in HMO Demand	0	-9	7	-60	-28	-57	73	218	374	542	542	542	542	542	542	542	542	542	
HMO Index	100.0	99.3	100.6	95.2	97.8	95.5	105.9	117.6	130.2	143.6	143.6	143.6	143.6	143.6	143.6	143.6	143.6	143.6	**43.6**

Table 8b: Bath Spa University, Demand and Supply for Student Accommodation – using full-time enrolment as a proxy for demand and assuming 3,650 more full-time students to <u>2028/29</u>

	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	Change
Total Full-Time Students (Demand)	6,045	5,930	5,995	6,310	6,506	6,707	6,915	7,130	7,351	7,578	7,813	8,056	8,305	8,563	8,828	9,102	9,384	9,675	**3,630**
Total annual growth		*-115*	*65*	*315*	*196*	*202*	*208*	*214*	*221*	*228*	*0*	*242*	*250*	*257*	*265*	*274*	*282*	*291*	
Uni Beds On campus	388	307	307	868	868	868	868	868	868	868	868	868	868	868	868	868	868	868	**480**
Uni Beds Off campus	686	686	686	686	963	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	**738**
Uni Beds Total	**1,074**	**993**	**993**	**1,554**	**1,831**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**1,218**
Non-affiliated accomodation	0	0	0	24	88	244	263	263	263	263	263	263	263	263	263	263	263	263	**263**
Total Beds	**1,074**	**993**	**993**	**1,578**	**1,919**	**2,536**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**1,481**
Residual Bedrooms Needed	4,971	4,937	5,002	4,732	4,587	4,171	4,360	4,575	4,796	5,023	5,258	5,501	5,750	6,008	6,273	6,547	6,829	7,120	**2,149**
Student HMOs needed	1,243	1,234	1,251	1,183	1,147	1,043	1,090	1,144	1,199	1,256	1,315	1,375	1,438	1,502	1,568	1,637	1,707	1,780	**537**
Yearly change in HMO Demand		-9	16	-68	-36	-104	47	54	55	57	59	61	62	64	66	68	71	73	
Cumualtive change in HMO Demand	0	-9	7	-60	-97	-200	-153	-100	-44	13	71	132	194	259	325	393	464	537	
HMO Index	100.0	99.3	100.6	95.2	92.3	83.9	87.7	92.0	96.5	101.1	105.8	110.7	115.7	120.9	126.2	131.7	137.4	143.2	**43.2**

Table 9a: Bath Spa University, Demand and Supply for Student Accommodation – using undergraduate full-time enrolment as a proxy for demand and assuming 3,100 more full-time students to 2020/21

	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	Change
Total Full-Time **UG** Students (Demand)	5,375	5,120	5,100	5,214	5,636	6,093	6,586	7,120	7,697	8,320	8,320	8,320	8,320	8,320	8,320	8,320	8,320	8,320	**2,945**
Total annual growth		*-255*	*-20*	*114*	*422*	*457*	*494*	*533*	*577*	*623*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	
Uni Beds On campus	388	307	307	868	868	868	868	868	868	868	868	868	868	868	868	868	868	868	**480**
Uni Beds Off campus	686	686	686	686	963	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	**738**
Uni Beds Total	**1,074**	**993**	**993**	**1,554**	**1,831**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**1,218**
Non-affiliated accomodation	0	0	0	24	88	244	263	263	263	263	263	263	263	263	263	263	263	263	**263**
Total Beds	**1,074**	**993**	**993**	**1,578**	**1,919**	**2,536**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**1,481**
Residual Bedrooms Needed	4,301	4,127	4,107	3,636	3,717	3,557	4,031	4,565	5,142	5,765	5,765	5,765	5,765	5,765	5,765	5,765	5,765	5,765	**1,464**
Student HMOs needed	1,075	1,032	1,027	909	929	889	1,008	1,141	1,285	1,441	1,441	1,441	1,441	1,441	1,441	1,441	1,441	1,441	**366**
Yearly change in HMO Demand		-44	-5	-118	20	-40	119	133	144	156	0	0	0	0	0	0	0	0	
Cumualtive change in HMO Demand	0	-44	-49	-166	-146	-186	-67	66	210	366	366	366	366	366	366	366	366	366	
HMO Index	100.0	83.0	82.6	73.1	74.8	71.6	81.1	91.8	103.4	116.0	116.0	116.0	116.0	116.0	116.0	116.0	116.0	116.0	**16.0**

Table 9b: Bath Spa University, Demand and Supply for Student Accommodation – using undergraduate full-time enrolment as a proxy for demand and assuming 3,100 more full-time students to 2028/29

	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	Change
Total Full-Time **UG** Students (Demand)	5,375	5,120	5,100	5,214	5,391	5,575	5,764	5,960	6,163	6,372	6,589	6,813	7,045	7,284	7,532	7,788	8,053	8,326	**2,951**
Total annual growth		*-255*	*-20*	*114*	*177*	*183*	*190*	*196*	*203*	*210*	*217*	*224*	*232*	*240*	*248*	*256*	*265*	*274*	
Uni Beds On campus	388	307	307	868	868	868	868	868	868	868	868	868	868	868	868	868	868	868	**480**
Uni Beds Off campus	686	686	686	686	963	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	**738**
Uni Beds Total	**1,074**	**993**	**993**	**1,554**	**1,831**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**2,292**	**1,218**
Non-affiliated accomodation	0	0	0	24	88	244	263	263	263	263	263	263	263	263	263	263	263	263	**263**
Total Beds	**1,074**	**993**	**993**	**1,578**	**1,919**	**2,536**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**2,555**	**1,481**
Residual Bedrooms Needed	4,301	4,127	4,107	3,636	3,472	3,039	3,209	3,405	3,608	3,817	4,034	4,258	4,490	4,729	4,977	5,233	5,498	5,771	**1,470**
Student HMOs needed	1,075	1,032	1,027	909	868	760	802	851	902	954	1,008	1,064	1,122	1,182	1,244	1,308	1,374	1,443	**368**
Yearly change in HMO Demand		-44	-5	-118	-41	-108	43	49	51	52	54	56	58	60	62	64	66	68	
Cumualtive change in HMO Demand	0	-44	-49	-166	-207	-316	-273	-224	-173	-121	-67	-11	47	107	169	233	299	368	
HMO Index	100.0	83.0	82.6	73.1	69.9	61.1	64.6	68.5	72.6	76.8	81.1	85.7	90.3	95.1	100.1	105.3	110.6	116.1	**16.1**

Off-campus sources of supply

4.1 In addition to the programmes of development on each campus, off-campus managed accommodation blocks have been built/converted or is permitted via other providers

Table 10: Off-campus accommodation development since 2011/12

Development	Beds	Notes
Green Park House	461	Permitted May 2014. **Bath Spa** has exclusivity. Under Construction
Twerton Mill	266	Permitted April 2014. (266 in studio/cluster flats and 61 in 10 townhouses) **Bath Spa** has exclusivity re the 266 studio/cluster flats. Complete 2015/16
Sub-total	**727**	**Bath Spa Only**
James Street West	169	Under Construction. Should be ready for 2015/16
Brougham Hayes	100	Under Construction (Previously consent for 44 affordable flats!)
1-3 James Street West	78	Permitted but not started - but will start
Twerton Mill (residual)	61	Permitted April 2014. Complete 2015/16
The Quasar Building	48	Converted 2011/12
Widcombe Social Club	40	Permitted November 2013. Now Completed. Part of a mixed use retail, social club and student housing scheme
1-3 Westgate Buildings	29	Permitted February 2014
Sub-total	**525**	**Assume around 262 each**

4.2 There is uncertainty about the implementation of the BWR capacity of 375 by 2021, or at all. The land is not available for development (if it ever was).

Planning Applications and Pre-application enquiries

4.3 In addition the following sites are 'on the radar' as former planning applications pre-application enquiry's

- **Site of Old Gas Works, Upper Bristol Road** (14/00004/PADEV) **404** bedspaces.Planning application imminent
- **Hartwells, Upper Bristol Road** (14/03977/OUT) **264** bedspaces. Planning application withdrawn
- **Rear and adjoining Magistrates Court** c.**150**
- **Wansdyke Business Centre** c.**100**

The Combined Picture for Bath

5.1 In this section the findings for each University are merged together provide a comprehensive view of current student numbers, future aspirations, accommodation needs arising, the and available supply of dedicated space.

Total Growth in Enrolment

5.2 The latest year for which there are figures for both Universities is 2014/15.

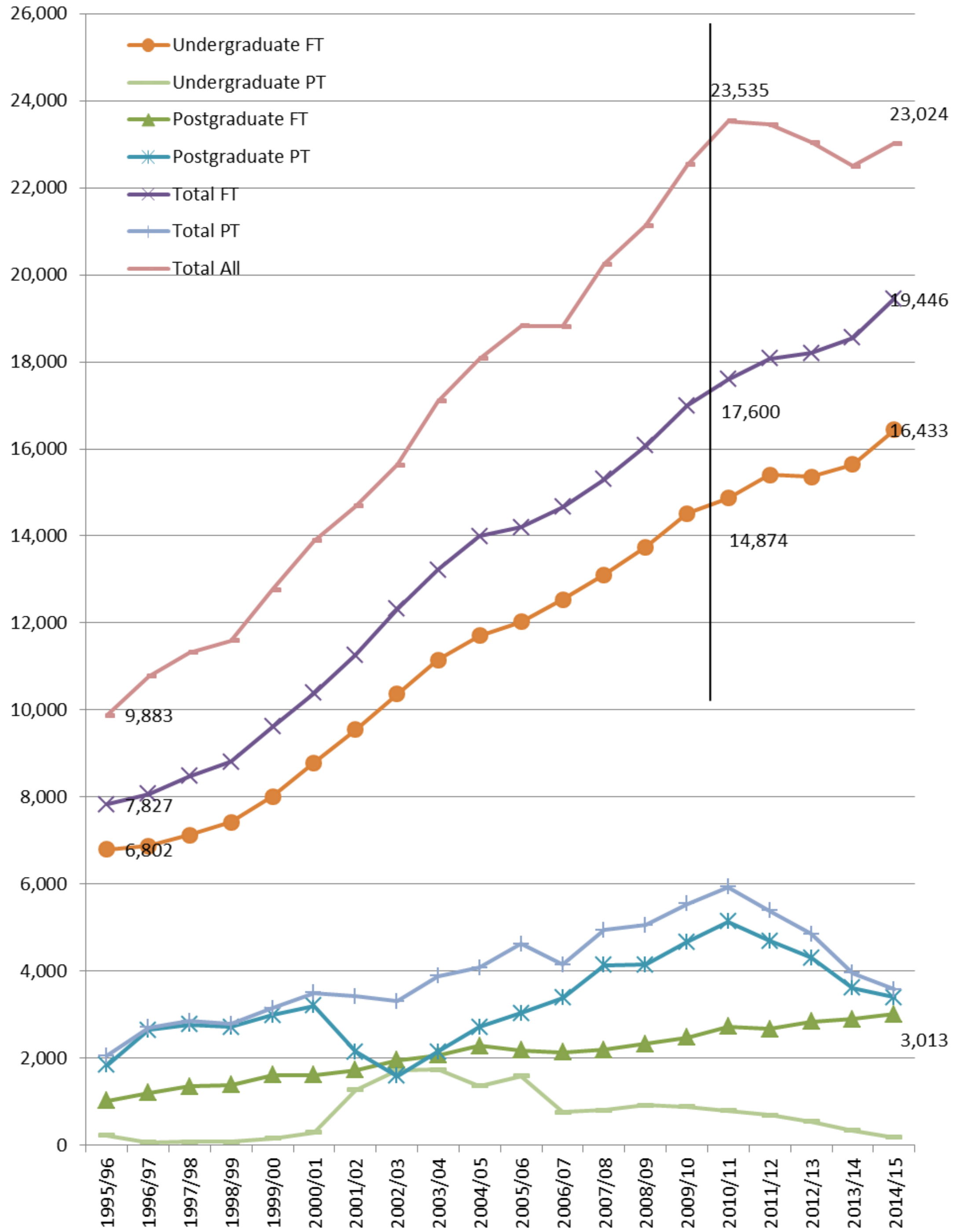
Table 11: Total Student Numbers

	Undergraduate			Postgraduate			Total FT	Total PT	Total All
	FT	PT	Total	FT	PT	Total			
1995/96	6,802	219	7,021	1,025	1,837	2,862	**7,827**	**2,056**	**9,883**
1996/97	6,873	60	6,933	1,201	2,647	3,848	**8,074**	**2,707**	**10,781**
1997/98	7,121	76	7,197	1,355	2,771	4,126	**8,476**	**2,847**	**11,323**
1998/99	7,423	75	7,498	1,390	2,710	4,100	**8,813**	**2,785**	**11,598**
1999/00	8,011	159	8,170	1,607	2,993	4,600	**9,618**	**3,152**	**12,770**
2000/01	8,781	296	9,077	1,613	3,200	4,813	**10,394**	**3,496**	**13,890**
2001/02	9,544	1,272	10,816	1,726	2,148	3,874	**11,270**	**3,420**	**14,690**
2002/03	10,367	1,720	12,087	1,951	1,589	3,540	**12,318**	**3,309**	**15,627**
2003/04	11,154	1,740	12,894	2,064	2,141	4,205	**13,218**	**3,881**	**17,099**
2004/05	11,714	1,357	13,071	2,285	2,719	5,004	**13,999**	**4,076**	**18,075**
2005/06	12,024	1,592	13,616	2,180	3,034	5,214	**14,204**	**4,626**	**18,830**
2006/07	12,535	763	13,298	2,131	3,385	5,516	**14,666**	**4,148**	**18,814**
2007/08	13,111	802	13,913	2,193	4,139	6,332	**15,304**	**4,941**	**20,245**
2008/09	13,743	916	14,659	2,328	4,143	6,471	**16,071**	**5,059**	**21,130**
2009/10	14,514	879	15,393	2,477	4,668	7,145	**16,991**	**5,547**	**22,538**
2010/11	14,874	795	15,669	2,726	5,140	7,866	**17,600**	**5,935**	**23,535**
2011/12	15,404	690	16,094	2,671	4,692	7,363	**18,075**	**5,382**	**23,457**
2012/13	15,362	542	15,904	2,835	4,308	7,143	**18,197**	**4,850**	**23,047**
2013/14	15,647	337	15,984	2,901	3,618	6,519	**18,548**	**3,955**	**22,503**
2014/15	16,433	176	16,609	3,013	3,402	6,415	**19,446**	**3,578**	**23,024**

5.3 Tables 6 and Figure 8 set out how the number of students has been increasing. For the 2012/13 academic year there were a total of 23,047 students. There were about 16,600 undergraduates (70%) and 6,400 postgraduates (30%). 19,500 students (79%) were studying on full-time courses. As context, the population of Bath in 2011 was 89,000.

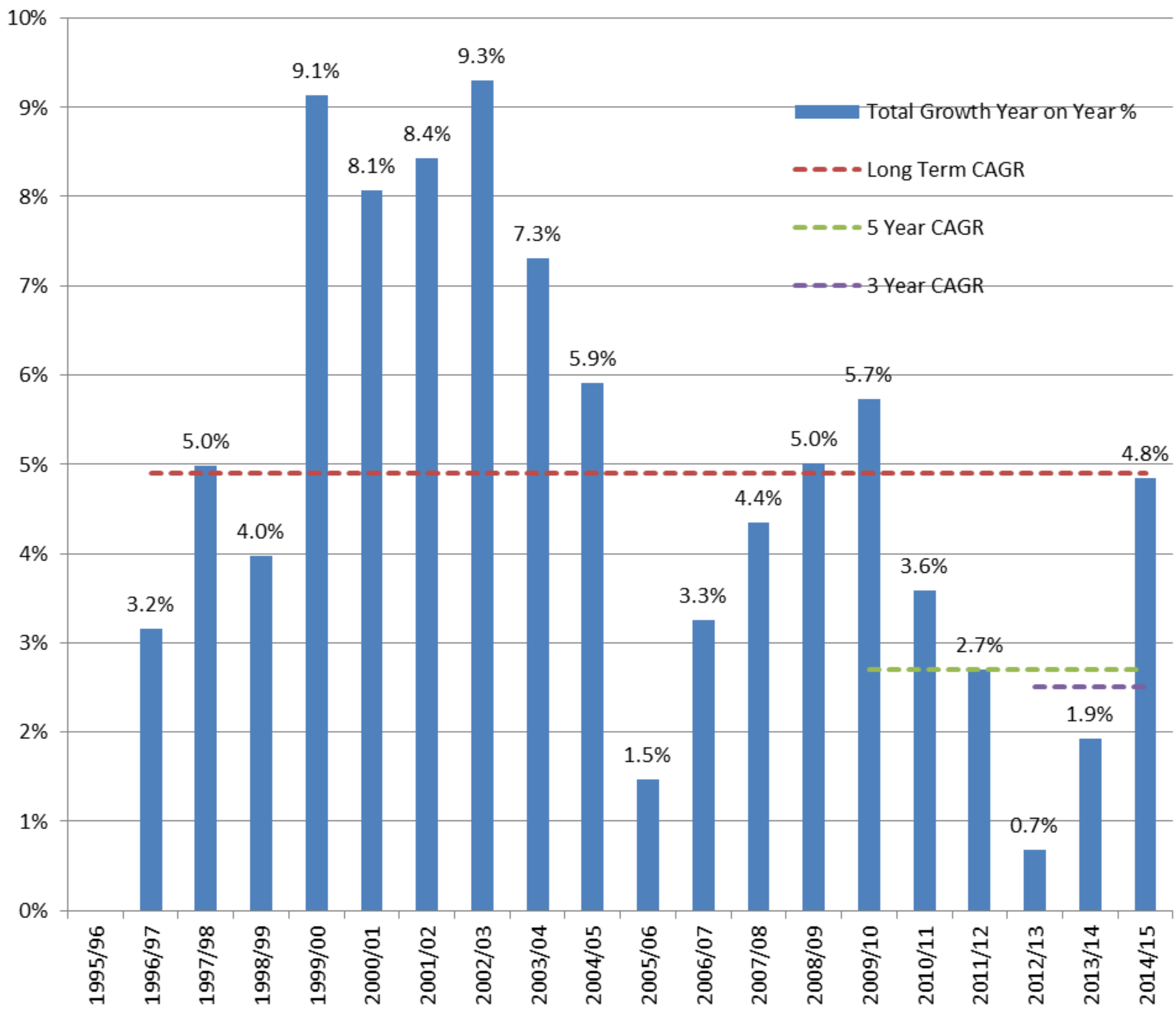
5.4 The vertical dashed line in Figure 13 represents the beginning of the Development Plan Period (Core Strategy period). There has been a contraction of around 500 enrolled students since 2011/12, but more significantly from an accommodation needs perspective is that full-time enrolment is up nearly 2,000 in the last 4 years, with undergraduate enrolment up around 1,600.

Figure 13: Total Student Numbers



5.5 Figure 14, shows that the long term compound annual growth rate has been about 5.1%, but for the last 5 years it has been 2.6% and for the last 3 years 0.7%. During the first 10 year of data it was 6.6%

Figure 14: Annual and Compound Average Rates of Growth



Current Demand for Living Accommodation

5.6 It is difficult to present a definitive single combined picture of current and future needs for Bath. The approach taken is to present join tables as follows:

- **Table 12** - Here Tables 4a and 4b (University of Bath) are combined, and then joined with Table 8a (Bath Spa – all FT as proxy for demand).

- **Table 13** - Here Tables 4a and 4b (University of Bath) are combined, and then joined with Table 9a (Bath Spa – all FT UG as a proxy for demand).

- **Tables 14 and 15 -** Here Tables 4a and 4b (University of Bath) are combined, and then joined with Table 8b and the 9b. The 'b' tables stretched out the growth achieved in the 'a' tables by 2020/21 to 2028/29. Thus, there is a slower trajectory for the same amount of change – as the amount of change to 2020/21 in the 'a' tables is very high (must higher than any observable trend).

- **Table 16** is a summary of change to 2020/21 shown in Tables 12-15. This is presented as it is the time horizon of university – although the Plan horizon is 2028/29 and Tables 12-15 set out potential futures to this date (albeit neutral of accommodation constraints)

<u>Commentary</u>

5.7 **Table 12** shows that once everything is taken into account, and in the absence of any further dedicated accommodation, that if the aspirations set out were to be realised, there would be a need for 4,926 more HMO bedspaces and 1,231 HMOs between 2011/12 and 2020/21. This reduces to 4,667 and 1,167 from 2014/15. Over 6 years that would require 194 HMOs per annum. That is unlikely. There have been 32 HMOs permitted per annum since the Article 4 Direction was introduced in July 2013. The net additional housing apportionment to Bath is 388 per annum and so that level of conversion would be very harmful to overall and 5 year housing supply matters. Further in-city blocks wold reduce the need for HMO growth – but there would be an opportunity cost and site allocations would need to be made against the background of Policy B5 of the Core Strategy – which only allows student accommodation if it would not harm the realisation of the objectives for other uses. The University of Bath may be able to do more to influence its aspirations – giving the nature of and policies affecting its estate. Interesting the modelled number of HMOs requires to 2014/16 (66) isn't far off what has been permitted. The modelled HMO index has increased a little since growth at 2014/15 but shows more signs of stress thereafter.

5.8 For comprehensiveness the table shows speculative additional requirement generated by the University of Bath if aspirations to 2020/21 were to be achieved. It may take longer to achieve those aspirations and only if additional on-campus capacity is utilised.

5.9 **Table 13** begins in 2011/12 and ends in 2020/21 with a slightly smaller overall student HMO sector. The rate of change is also slightly less but still results in a residual of over 4,000 bedspaces and over 1,000 HMOs. The general commentary for Table 12 still applies as do the observations for the longer term growth the University of Bath.

5.10 **Tables 14 and 15** present the scenarios whereby it takes twice as long for Bath Spa University to generate the demands arising by 2021/21 (yet still within the plan period). These slower trajectories are still based on a pretty healthy +3.0% growth per annum (10 year trend).

5.11 In **Table 14** the level of change in the immediate future is reduced to 2,800 bedrooms and 700 HMOs. Having regard to the supply data for institution, this is primarily a function if the University of Bath in Table 14.There is undeveloped, non-green belt land at Claverton that could make a significant dent in that figure to support the University's aspirations to 2020/21, but whether it is all practicably deliverable by 2020/21 in additional to the 1,000 assumed is another matter – as previously stated. In the longer term Bath Spa's potential needs continue to increase alongside the potential needs of the University if Bath. Bath Spa University has done much to secure its element of Table 14 (derived from 8b) as a viable trajectory that would not conflict with other objectives.

5.12 **Table 15** is brings change to 2020/21 down to a residual need for 2,300 bedrooms and 500 HMOs. Around 40% of that number of bedrooms is identified live pre-application enquiries (but of that 75% is either already allocated or is earmarked as a new or rolled forward normal housing and affordable housing allocation). Thus Policy B5 of the core Strategy is not satisfied. This shortfall in this scenario is again mostly University of Bath related to 2020/21. Further, one must still have an eye to 2028/29 as although Universities won't/can't plan that far ahead – change will still likely occur. The current intake will be affect in art by low birth rates in the late 1990s/early 2000s, but the boost in births since 2005 is well documented and that will feed its way in to the HE system in the 2020s

Conclusions

5.13 The evidence for plan-making and town management boils down to a question of what spare developable capacity remains the in the city and on-campus to enable student accommodation to in turn enable the Universities to achieve their aspirations. That capacity relates to the room for more dedicated blocks and scope for further HMO growth (within the regulatory framework of the Article 4 Direction, the scope of the market to increase at the required rate, and in new areas below the Article 4 threshold). There is of course an opportunity cost to both elements. As stated at the beginning of this report, accommodation is needed to enable enrolment. It may be that aspirations are modified based on what accommodation is realistically deliverable within the regularly planning framework. Other factors may also affect enrolment. The cap could return with the same suprise with which it was removed.

5.14 Policy B5 of the Core Strategy prioritises uses other than student accommodation blocks in key areas of the city that are going to change during the plan period. It's not an absolute blanket ban, but given the tightness of land supply it will severely limit the acceptability future dedicated blocks. (Council tax exempt) HMO conversions via planning permission generate a need for compensatory normal housing provision - but that is unlikely to be at Bath to any significant degree. Replacement away for Bath is less sustainable than retention in Bath.

5.15 Communities with low levels of HMOs or emerging moderate levels will be concerned about potential growth. There may be a need to review the A4 Direction (in-principle and its thresholds) at regular intervals and explore refinements. For example where an area is at 3% it may be that not more than 5-10% growth should be permitted rather than allowing up to 25%. The current 25% is generous compared to other places. Or, alternatively where some pockets of residential streets are significantly above 25% (for historic reasons), that surplus could be accounted for used to offset capacity neighbouring areas that are under threshold (so that a bigger area became the unit of analysis). At present surplus above threshold play no offsetting role. Appendix 4 shows current concentrations of HMOs. Purple areas are at or above threshold. The implication of the approach floated would be to 'delete/remove' the headroom capacity available in some of the neighbouring areas below threshold. Such options would be favoured by some parties but not others. With Policy B5 in place the higher education sector, for one, would be further impacted by such an amendment. There is also a non-student HMO sector to consider. Some may favour a loosening of the A4 Direction (that would potentially increase supply and concentration in current hotspots and potentially reduce the incidence of spread). That would be beneficial Good if you are a landlord or a University, but not so if you live in or around a current hotspot, and likely not conducive to the retention of mixed communities. That is a matter to be considered beyond, but linked to the Placemaking Plan. The justification or the current Article 4 direction is currently about mixed communities in streets, but the strategic issues relating to the housing stock of the city (a unique city) are also relevant.

5.16 Finally, the University of Bath is able to boost accommodation supply by virtue of land that was removed from the Green Belt in 2007. This has not received much/any attention for this use in respect of development identified within the masterplan that followed the retraction of the Green Belt. Assuming it was to be programmed for development, the rate of development would have a bearing on accommodation supply. It may take some time to bring forward any potential / phases identified. (esp if the University were to build itself). It may be unwilling to relinquish control for the sake of more rapid development. It charitable status may also have an impact on the legitimacy of any partnership development options re accommodation.

Table 12: Tables 4a and 4b (University of Bath) are combined, and then joined with Table 8a (Bath Spa – all FT as proxy for demand – with demand arising by 2020/21).

Row	Factor	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Change 11/12 - 20/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	Change 20/21-28/29
1	Bath Uni Housing Need	10,290	10,619	11,094	11,585	12,248	12,787	13,424	13,878	14,394	15,013	4,723	15,459	15,922	16,400	16,892	17,399	17,921	18,458	19,012	3,999
2	Bath Spa Housing Need All FT	6,045	5,930	5,995	6,310	6,778	7,281	7,821	8,402	9,025	9,695	3,650	9,695	9,695	9,695	9,695	9,695	9,695	9,695	9,695	0
3	**Total Housing Need**	**16,335**	**16,549**	**17,089**	**17,895**	**19,026**	**20,068**	**21,245**	**22,280**	**23,419**	**24,708**	8,373	**25,154**	**25,617**	**26,095**	**26,587**	**27,094**	**27,616**	**28,153**	**28,707**	**3,999**
4	**Bath Uni on-campus**	2,452	2,452	2,452	3,156	3,156	3,156	3,406	3,406	3,406	4,156	1,704	4,156	4,156	4,156	4,156	4,156	4,156	4,156	4,156	0
5	**Bath Spa on-campus**	388	307	307	868	868	868	868	868	868	868	480	868	868	868	868	868	868	868	868	0
6	**Total on-campus**	**2,840**	**2,759**	**2,759**	**4,024**	**4,024**	**4,024**	**4,274**	**4,274**	**4,274**	**5,024**	2,184	5,024	5,024	5,024	5,024	5,024	5,024	5,024	5,024	**0**
7	**Bath Uni off-campus**	895	895	895	895	895	895	895	895	895	895	0	895	895	895	895	895	895	895	895	0
8	**Bath Spa off-campus**	686	686	686	686	963	1,424	1,424	1,424	1,424	1,424	738	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	0
9	**Uni Beds off-campus**	**1,581**	**1,581**	**1,581**	**1,581**	**1,858**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	738	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**0**
10	**Non-affiliated Private Accmodation**	**0**	**48**	**48**	**117**	**178**	**447**	**525**	**525**	**525**	**525**	525	525	525	525	525	525	525	525	525	**0**
11	*Quasar Building*		*48*	*48*	*48*	*48*	*48*	*48*	*48*	*48*	*48*		*48*	*48*	*48*	*48*	*48*	*48*	*48*	*48*	
12	*1-3 Westgate Buildings*				*29*	*29*	*29*	*29*	*29*	*29*	*29*		*29*	*29*	*29*	*29*	*29*	*29*	*29*	*29*	
13	*Widcombe Social Club*				*40*	*40*	*40*	*40*	*40*	*40*	*40*		*40*	*40*	*40*	*40*	*40*	*40*	*40*	*40*	
14	*Twerton Mill*					*61*	*61*	*61*	*61*	*61*	*61*		*61*	*61*	*61*	*61*	*61*	*61*	*61*	*61*	
15	*Brougham Hayes*						*100*	*100*	*100*	*100*	*100*		*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	
16	*James Street West*						*169*	*169*	*169*	*169*	*169*		*169*	*169*	*169*	*169*	*169*	*169*	*169*	*169*	
17	*1-3 James Street*							*78*	*78*	*78*	*78*		*78*	*78*	*78*	*78*	*78*	*78*	*78*	*78*	
18	**Beds Total**	**4,421**	**4,388**	**4,388**	**5,722**	**6,060**	**6,790**	**7,118**	**7,118**	**7,118**	**7,868**	**3,447**	**7,663**	**7,868**	**7,868**	**7,868**	**7,868**	**7,868**	**7,868**	**7,868**	**3,447**
19	*Beds as % of Demand*	*27.1%*	*26.5%*	*25.7%*	*32.0%*	*31.9%*	*33.8%*	*33.5%*	*31.9%*	*30.4%*	*31.8%*		*30.5%*	*30.7%*	*30.2%*	*29.6%*	*29.0%*	*28.5%*	*27.9%*	*27.4%*	
20	Residual HMO Beds Demand	11,914	12,161	12,701	12,173	12,966	13,278	14,127	15,162	16,301	16,840	**4,926**	17,491	17,749	18,227	18,719	19,226	19,748	20,285	20,839	**3,999**
21	Cumulative HMOs Beds Demand Change	0	247	787	259	1,052	1,364	2,213	3,248	4,387	4,926		5,577	5,835	6,313	6,805	7,312	7,834	8,371	8,925	
22	Residual Student HMOs needed	2,979	3,040	3,175	3,043	3,242	3,320	3,532	3,790	4,075	4,210	**1,231**	4,373	4,437	4,557	4,680	4,806	4,937	5,071	5,210	**1,000**
23	Cumulative HMOs Change		62	197	65	263	341	553	812	1,097	1,231		1,394	1,459	1,578	1,701	1,828	1,958	2,093	2,231	
24	HMO Index	100.0%	102.1%	106.6%	102.2%	108.8%	111.4%	118.6%	127.3%	136.8%	141.3%		146.8%	149.0%	153.0%	157.1%	161.4%	165.8%	170.3%	174.9%	

Table 13: Tables 4a and 4b (University of Bath) are combined, and then joined with Table 9a (Bath Spa – all FT UG as proxy for demand – with demand arising over a longer period to 2028/29)

Row	Factor	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Change 11/12 - 20/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	Change 20/21-28/29
1	Bath Uni Housing Need	10,290	10,619	11,094	11,585	12,248	12,787	13,424	13,878	14,394	15,013	4,723	15,459	15,922	16,400	16,892	17,399	17,921	18,458	19,012	3,999
2	Bath Spa Housing Need All FT	5,375	5,120	5,100	5,214	5,636	6,093	6,586	7,120	7,697	8,320	2,945	8,320	8,320	8,320	8,320	8,320	8,320	8,320	8,320	0
3	**Total Housing Need**	**15,665**	**15,739**	**16,194**	**16,799**	**17,884**	**18,880**	**20,010**	**20,998**	**22,091**	**23,333**	**7,668**	**23,779**	**24,242**	**24,720**	**25,212**	**25,719**	**26,241**	**26,778**	**27,332**	**3,999**
4	**Bath Uni on-campus**	2,452	2,452	2,452	3,156	3,156	3,156	3,406	3,406	3,406	4,156	1,704	4,156	4,156	4,156	4,156	4,156	4,156	4,156	4,156	0
5	**Bath Spa on-campus**	388	307	307	868	868	868	868	868	868	868	480	868	868	868	868	868	868	868	868	0
6	**Total on-campus**	**2,840**	**2,759**	**2,759**	**4,024**	**4,024**	**4,024**	**4,274**	**4,274**	**4,274**	**5,024**	**2,184**	5,024	5,024	5,024	5,024	5,024	5,024	5,024	5,024	**0**
7	**Bath Uni off-campus**	895	895	895	895	895	895	895	895	895	895	0	895	895	895	895	895	895	895	895	0
8	**Bath Spa off-campus**	686	686	686	686	963	1,424	1,424	1,424	1,424	1,424	738	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	0
9	**Uni Beds off-campus**	**1,581**	**1,581**	**1,581**	**1,581**	**1,858**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	738	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**0**
10	**Non-affiliated Private Accmodation**	**0**	**48**	**48**	**117**	**178**	**447**	**525**	**525**	**525**	**525**	525	**525**	**525**	**525**	**525**	**525**	**525**	**525**	**525**	**0**
11	*Quasar Building*		*48*	*48*	*48*	*48*	*48*	*48*	*48*	*48*	*48*		*48*	*48*	*48*	*48*	*48*	*48*	*48*	*48*	
12	*1-3 Westgate Buildings*				*29*	*29*	*29*	*29*	*29*	*29*	*29*		*29*	*29*	*29*	*29*	*29*	*29*	*29*	*29*	
13	*Widcombe Social Club*				*40*	*40*	*40*	*40*	*40*	*40*	*40*		*40*	*40*	*40*	*40*	*40*	*40*	*40*	*40*	
14	*Twerton Mill*					*61*	*61*	*61*	*61*	*61*	*61*		*61*	*61*	*61*	*61*	*61*	*61*	*61*	*61*	
15	*Brougham Hayes*						*100*	*100*	*100*	*100*	*100*		*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	
16	*James Street West*						*169*	*169*	*169*	*169*	*169*		*169*	*169*	*169*	*169*	*169*	*169*	*169*	*169*	
17	*1-3 James Street*							*78*	*78*	*78*	*78*		*78*	*78*	*78*	*78*	*78*	*78*	*78*	*78*	
18	**Beds Total**	**4,421**	**4,388**	**4,388**	**5,722**	**6,060**	**6,790**	**7,118**	**7,118**	**7,118**	**7,868**	**3,447**	**7,663**	**7,868**	**7,868**	**7,868**	**7,868**	**7,868**	**7,868**	**7,868**	**3,447**
19	*Beds as % of Demand*	*28.2%*	*27.9%*	*27.1%*	*34.1%*	*33.9%*	*36.0%*	*35.6%*	*33.9%*	*32.2%*	*33.7%*		*32.2%*	*32.5%*	*31.8%*	*31.2%*	*30.6%*	*30.0%*	*29.4%*	*28.8%*	
20	Residual HMO Beds Demand	11,244	11,351	11,806	11,077	11,824	12,090	12,892	13,880	14,973	15,465	**4,221**	16,116	16,374	16,852	17,344	17,851	18,373	18,910	19,464	**3,999**
21	Cumulative HMOs Beds Demand Change	0	-563	-108	-837	-90	176	978	1,966	3,059	3,551		4,202	4,460	4,938	5,430	5,937	6,459	6,996	7,550	
22	Residual Student HMOs needed	2,811	2,838	2,952	2,769	2,956	3,023	3,223	3,470	3,743	3,866	**1,055**	4,029	4,094	4,213	4,336	4,463	4,593	4,728	4,866	**1,000**
23	Cumulative HMOs Change		-141	-27	-209	-23	44	245	492	765	888		1,050	1,115	1,235	1,358	1,484	1,615	1,749	1,888	
24	HMO Index	100.0%	95.3%	99.1%	93.0%	99.2%	101.5%	108.2%	116.5%	125.7%	129.8%		135.3%	137.4%	141.4%	145.6%	149.8%	154.2%	158.7%	163.4%	

Table 14: Tables 4a and 4b (University of Bath) are combined, and then joined with Table 8b (Bath Spa – all FT as proxy for demand – with demand arising over a longer period to 2028/29)

Row	Factor	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Change 11/12 - 20/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	Change 20/21-28/29
1	Bath Uni Housing Need	10,290	10,619	11,094	11,585	12,248	12,787	13,424	13,878	14,394	15,013	4,723	15,459	15,922	16,400	16,892	17,399	17,921	18,458	19,012	3,999
2	Bath Spa Housing Need All FT	6,045	5,930	5,995	6,310	6,506	6,707	6,915	7,130	7,351	7,578	1,533	7,813	8,056	8,305	8,563	8,828	9,102	9,384	9,675	2,097
3	**Total Housing Need**	**16,335**	**16,549**	**17,089**	**17,895**	**18,754**	**19,494**	**20,339**	**21,008**	**21,745**	**22,591**	**6,256**	**23,272**	**23,978**	**24,705**	**25,455**	**26,227**	**27,023**	**27,843**	**28,687**	**6,096**
4	**Bath Uni on-campus**	2,452	2,452	2,452	3,156	3,156	3,156	3,406	3,406	3,406	4,156	1,704	4,156	4,156	4,156	4,156	4,156	4,156	4,156	4,156	0
5	**Bath Spa on-campus**	388	307	307	868	868	868	868	868	868	868	480	868	868	868	868	868	868	868	868	0
6	**Total on-campus**	**2,840**	**2,759**	**2,759**	**4,024**	**4,024**	**4,024**	**4,274**	**4,274**	**4,274**	**5,024**	**2,184**	5,024	5,024	5,024	5,024	5,024	5,024	5,024	5,024	**0**
7	**Bath Uni off-campus**	895	895	895	895	895	895	895	895	895	895	0	895	895	895	895	895	895	895	895	0
8	**Bath Spa off-campus**	686	686	686	686	963	1,424	1,424	1,424	1,424	1,424	738	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	0
9	**Uni Beds off-campus**	**1,581**	**1,581**	**1,581**	**1,581**	**1,858**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**738**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**0**
10	**Non-affiliated Private Accmodation**	**0**	**48**	**48**	**117**	**178**	**447**	**525**	**525**	**525**	**525**	**525**	**525**	**525**	**525**	**525**	**525**	**525**	**525**	**525**	**0**
11	*Quasar Building*		*48*	*48*	*48*	*48*	*48*	*48*	*48*	*48*	*48*		*48*	*48*	*48*	*48*	*48*	*48*	*48*	*48*	
12	*1-3 Westgate Buildings*				*29*	*29*	*29*	*29*	*29*	*29*	*29*		*29*	*29*	*29*	*29*	*29*	*29*	*29*	*29*	
13	*Widcombe Social Club*				*40*	*40*	*40*	*40*	*40*	*40*	*40*		*40*	*40*	*40*	*40*	*40*	*40*	*40*	*40*	
14	*Twerton Mill*					*61*	*61*	*61*	*61*	*61*	*61*		*61*	*61*	*61*	*61*	*61*	*61*	*61*	*61*	
15	*Brougham Hayes*						*100*	*100*	*100*	*100*	*100*		*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	
16	*James Street West*						*169*	*169*	*169*	*169*	*169*		*169*	*169*	*169*	*169*	*169*	*169*	*169*	*169*	
17	*1-3 James Street*							*78*	*78*	*78*	*78*		*78*	*78*	*78*	*78*	*78*	*78*	*78*	*78*	
18	**Beds Total**	**4,421**	**4,388**	**4,388**	**5,722**	**6,060**	**6,790**	**7,118**	**7,118**	**7,118**	**7,868**	**3,447**	**7,663**	**7,868**	**7,868**	**7,868**	**7,868**	**7,868**	**7,868**	**7,868**	**3,447**
19	*Beds as % of Demand*	*27.1%*	*26.5%*	*25.7%*	*32.0%*	*32.3%*	*34.8%*	*35.0%*	*33.9%*	*32.7%*	*34.8%*		*32.9%*	*32.8%*	*31.8%*	*30.9%*	*30.0%*	*29.1%*	*28.3%*	*27.4%*	
20	Residual HMO Beds Demand	11,914	12,161	12,701	12,173	12,694	12,704	13,221	13,890	14,627	14,723	**2,809**	15,609	16,110	16,837	17,587	18,359	19,155	19,975	20,819	**6,096**
21	Cumulative HMOs Beds Demand Change	0	247	787	259	780	790	1,307	1,976	2,713	2,809		3,695	4,196	4,923	5,673	6,445	7,241	8,061	8,905	
22	Residual Student HMOs needed	2,979	3,040	3,175	3,043	3,173	3,176	3,305	3,472	3,657	3,681	**702**	3,902	4,028	4,209	4,397	4,590	4,789	4,994	5,205	**1,524**
23	Cumulative HMOs Change		62	197	65	195	198	327	494	678	702		924	1,049	1,231	1,418	1,611	1,810	2,015	2,226	
24	HMO Index	100.0%	102.1%	106.6%	102.2%	106.5%	106.6%	111.0%	116.6%	122.8%	123.6%		131.0%	135.2%	141.3%	147.6%	154.1%	160.8%	167.7%	174.7%	

Table 15: Tables 4a and 4b (University of Bath) are combined, and then joined with Table 9b (Bath Spa – all FT UG as proxy for demand – with demand arising over a longer period to 2028/29).

Row	Factor	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Change 11/12 - 20/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	Change 20/21-28/29
1	Bath Uni Housing Need	10,290	10,619	11,094	11,585	12,248	12,787	13,424	13,878	14,394	15,013	4,723	15,459	15,922	16,400	16,892	17,399	17,921	18,458	19,012	3,999
2	Bath Spa Housing Need All FT UG	5,375	5,120	5,100	5,214	5,391	5,575	5,764	5,960	6,163	6,372	997	6,589	6,813	7,045	7,284	7,532	7,788	8,053	8,326	1,954
3	**Total Housing Need**	**15,665**	**15,739**	**16,194**	**16,799**	**17,639**	**18,362**	**19,188**	**19,838**	**20,557**	**21,385**	5,720	**22,048**	**22,735**	**23,445**	**24,176**	**24,931**	**25,709**	**26,511**	**27,339**	**5,953**
4	**Bath Uni on-campus**	2,452	2,452	2,452	3,156	3,156	3,156	3,406	3,406	3,406	4,156	1,704	4,156	4,156	4,156	4,156	4,156	4,156	4,156	4,156	0
5	**Bath Spa on-campus**	388	307	307	868	868	868	868	868	868	868	480	868	868	868	868	868	868	868	868	0
6	**Total on-campus**	**2,840**	**2,759**	**2,759**	**4,024**	**4,024**	**4,024**	**4,274**	**4,274**	**4,274**	**5,024**	**2,184**	5,024	5,024	5,024	5,024	5,024	5,024	5,024	5,024	**0**
7	**Bath Uni off-campus**	895	895	895	895	895	895	895	895	895	895	0	895	895	895	895	895	895	895	895	0
8	**Bath Spa off-campus**	686	686	686	686	963	1,424	1,424	1,424	1,424	1,424	738	1,424	1,424	1,424	1,424	1,424	1,424	1,424	1,424	0
9	**Uni Beds off-campus**	**1,581**	**1,581**	**1,581**	**1,581**	**1,858**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	738	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**2,319**	**0**
10	**Non-affiliated Private Accmodation**	**0**	**48**	**48**	**117**	**178**	**447**	**525**	**525**	**525**	**525**	525	525	525	525	525	525	525	525	525	**0**
11	*Quasar Building*		*48*	*48*	*48*	*48*	*48*	*48*	*48*	*48*	*48*		*48*	*48*	*48*	*48*	*48*	*48*	*48*	*48*	
12	*1-3 Westgate Buildings*				*29*	*29*	*29*	*29*	*29*	*29*	*29*		*29*	*29*	*29*	*29*	*29*	*29*	*29*	*29*	
13	*Widcombe Social Club*				*40*	*40*	*40*	*40*	*40*	*40*	*40*		*40*	*40*	*40*	*40*	*40*	*40*	*40*	*40*	
14	*Twerton Mill*					*61*	*61*	*61*	*61*	*61*	*61*		*61*	*61*	*61*	*61*	*61*	*61*	*61*	*61*	
15	*Brougham Hayes*						*100*	*100*	*100*	*100*	*100*		*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	
16	*James Street West*						*169*	*169*	*169*	*169*	*169*		*169*	*169*	*169*	*169*	*169*	*169*	*169*	*169*	
17	*1-3 James Street*							*78*	*78*	*78*	*78*		*78*	*78*	*78*	*78*	*78*	*78*	*78*	*78*	
18	**Beds Total**	**4,421**	**4,388**	**4,388**	**5,722**	**6,060**	**6,790**	**7,118**	**7,118**	**7,118**	**7,868**	**3,447**	**7,663**	**7,868**	**7,868**	**7,868**	**7,868**	**7,868**	**7,868**	**7,868**	**3,447**
19	*Beds as % of Demand*	*28.2%*	*27.9%*	*27.1%*	*34.1%*	*34.4%*	*37.0%*	*37.1%*	*35.9%*	*34.6%*	*36.8%*		*34.8%*	*34.6%*	*33.6%*	*32.5%*	*31.6%*	*30.6%*	*29.7%*	*28.8%*	
20	Residual HMO Beds Demand	11,244	11,351	11,806	11,077	11,579	11,572	12,070	12,720	13,439	13,517	**2,273**	14,385	14,867	15,577	16,308	17,063	17,841	18,643	19,471	**5,953**
21	Cumulative HMOs Beds Demand Change	0	-563	-108	-837	-335	-342	156	806	1,525	1,603		2,471	2,953	3,663	4,394	5,149	5,927	6,729	7,557	
22	Residual Student HMOs needed	2,811	2,838	2,952	2,769	2,895	2,893	3,018	3,180	3,360	3,379	**568**	3,596	3,717	3,894	4,077	4,266	4,460	4,661	4,868	**1,488**
23	Cumulative HMOs Change		-141	-27	-209	-84	-86	39	202	381	401		618	738	916	1,099	1,287	1,482	1,682	1,889	
24	HMO Index	100.0%	95.3%	99.1%	93.0%	97.2%	97.1%	101.3%	106.8%	112.8%	113.5%		120.7%	124.8%	130.7%	136.9%	143.2%	149.7%	156.5%	163.4%	

Table 16: Summary Change Figures 2011/12 – 2020/212

		Table 12	Table 13	Table 14	Table 15
Row	**Factor**	Change 11/12 - 20/21	Change 11/12 - 20/21	Change 11/12 - 20/21	Change 11/12 - 20/21
1	Bath Uni Housing Need	4723	4723	4723	4723
2	Bath Spa Housing Need All FT	3650	2945	1533	997
3	**Total Housing Need**	**8373**	**7668**	**6256**	**5720**
4	**Bath Uni on-campus**	1704	1704	1704	1704
5	**Bath Spa on-campus**	480	480	480	480
6	**Total on-campus**	**2184**	**2184**	**2184**	**2184**
7	**Bath Uni off-campus**	0	0	0	0
8	**Bath Spa off-campus**	738	738	738	738
9	**Uni Beds off-campus**	**738**	**738**	**738**	**738**
10	**Non-affiliated Private Accmodation**	**525**	**525**	**525**	**525**
11	*Quasar Building*				
12	*1-3 Westgate Buildings*				
13	*Widcombe Social Club*				
14	*Twerton Mill*				
15	*Brougham Hayes*				
16	*James Street West*				
17	*1-3 James Street*				
18	**Beds Total**	**3447**	**3447**	**3447**	**3447**
19	*Beds as % of Demand*				
20	Residual HMO Beds Demand	**4926**	**4221**	**2809**	**2273**
21	Cumulative HMOs Beds Demand Change				
22	Residual Student HMOs needed	**1231**	**1055**	**702**	**568**
23	Cumulative HMOs Change				
24	HMO Index				

Appendix 1: Determining Housing need from total enrolment for the University of Bath (old approach)

- 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-timeon campus

- An analysis of the term time postcodes of groups 2-4 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. We will monitor this at each plan review.

Appendix 2 Paragraphs 54-65 of the Core Strategy Inspector's Report (June 2014)

Students

59. The PPG (*How should local planning authorities deal with student housing?)* indicates that all student accommodation can be included in the housing requirement based on the amount of accommodation it releases in the housing market. The Council's treatment of student housing needs and the provision of student accommodation has changed several times during the course of the Examination. The PPG does not make it a requirement to include student housing as part of housing supply, but it is essential for the assumptions about student demand for accommodation and its supply to be clear and to be monitored in case those assumptions do not hold true for the plan period.

60. The *Draft SHMA Update* 2013 had not included students at all in the projections, but the *Addendums* do include a student population within the projections, the size of which is assumed to remain constant (*Addendum 1a*, paragraph 14). This assumption is based on the Council's conclusions from its *Student Numbers and Accommodation Requirements Evidence Base* July 2013 (published with BNES/43). This updated a similar paper from 2010 (CD6/D1). The 2013 paper draws on the advice provided to the Council by the two universities within the district - Bath University and Bath Spa University - regarding their future plans for students and accommodation.

61. Bath University's known plans do not extend over the full plan period, but project either 1% or 3% growth for part of the period. It is continuing to plan for additional accommodation on the campus. Bath Spa University is assuming no future growth in students, but plans to add a further 600 beds on campus. Overall, the Council concludes that if Bath Spa does not expand and Bath University grows by only 1% pa and all the accommodation plans are realised, then students should not add to housing pressures over the plan period and that between 250-575 houses in multiple occupation could be released from student use and returned to the general housing market. But it has not relied on any such releases as a contribution to supply.

62. Clearly there are uncertainties. The universities might grow more than currently planned, particularly given the lifting of the Government's cap on university places – albeit that Bath University's growth may not have been influenced by the cap because of its high entrance requirements. Post-hearing comments on the PPG on behalf of Unite Group PLC refer to Bath Spa's plans to significantly increase its proportion of overseas students, but it is not clear whether this would represent an increase in students overall or simply a higher proportion of overseas students. In addition, the delivery of on-campus accommodation for both universities has been slower than originally intended and similar delays might occur.

63. There is some leeway for these factors to change without significantly affecting the general housing market. Nevertheless, the assumption underpinning this element of the SHMA of no net increase in demand from students on the general housing market is a crucial one. It is essential that this assumption is made explicit in the plan and reassessed at future plan reviews so that any additional pressures on the housing market can be identified and taken into account. I have added wording in **MM8** and **MM134** to make this clear.

64. Bath spatial strategy policy B1.7 refers to additional on-campus accommodation enabling a growth in student numbers and/or a shrinkage of the private student lettings market, whereas the assumption by the Council is for limited growth in numbers and no need for expansion of the private letting market. Accordingly this text needs to be amended to reflect this position (**MM23** in part). With this change, the plan would leave off-campus purpose-built student accommodation to be determined on its merits other than in the Central Area and Western Corridor (Enterprise Area) where policy B5 indicates that such proposals would be refused if they would adversely affect the realisation of other aspects of the vision and spatial strategy. This approach is reasonable given the other priorities for these areas which cover only a small part of the City. In any case, avoiding additional student pressures in the housing market is part of the underlying strategy which the Council would need to take into account in determining whether any proposals conflicted with this policy. A growing need for such off-campus accommodation would be a matter to address in a review of the plan.

Appendix 3 Key Core Strategy Extracts

Para1.26d

The assessment of housing needs is based on two important assumptions. Firstly, the Council assumes that the expected limited growth in the student population at Bath's two universities will be accommodated in the planned growth of mainly on-campus new student accommodation, which can be supplemented by new off campus accommodated where appropriate. If the provision of purpose-built student accommodation does not keep up with the growth in the resident student population, more market housing will be needed because of the pressure on the private letting market. Secondly, the SHMA assumes that the contribution to the provision of affordable housing needs from private rented accommodation where occupiers are receiving housing benefit will continue at a similar scale in the future. If this contribution were to significantly fall, the need for new affordable housing would increase.

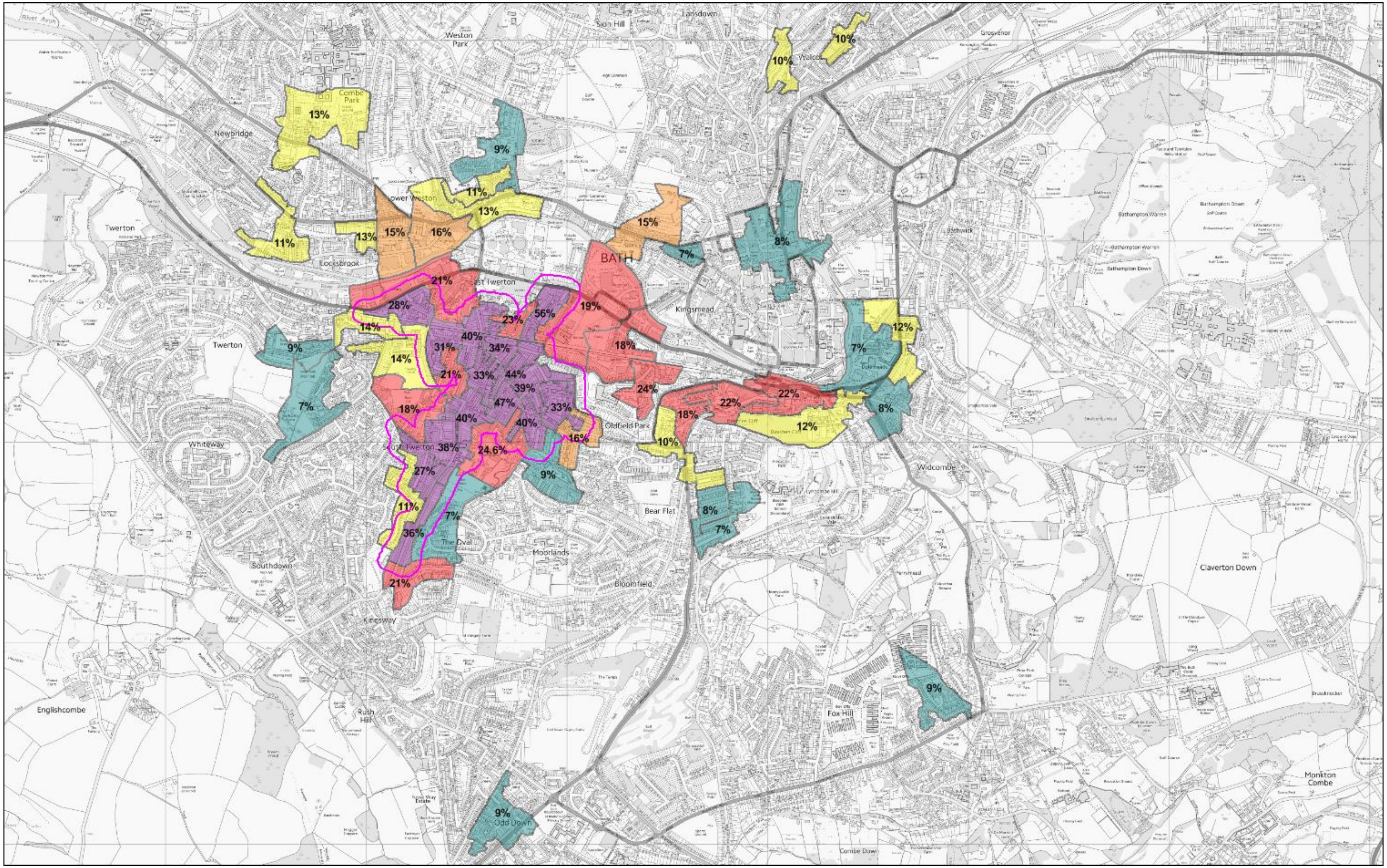
Policy B1(7a)

Enable the provision of additional on-campus student bed spaces at the University of Bath and at Bath Spa University, and new off-campus student accommodation subject to policy B5, thereby facilitating growth in the overall number of students whilst avoiding growth of the student lettings market.

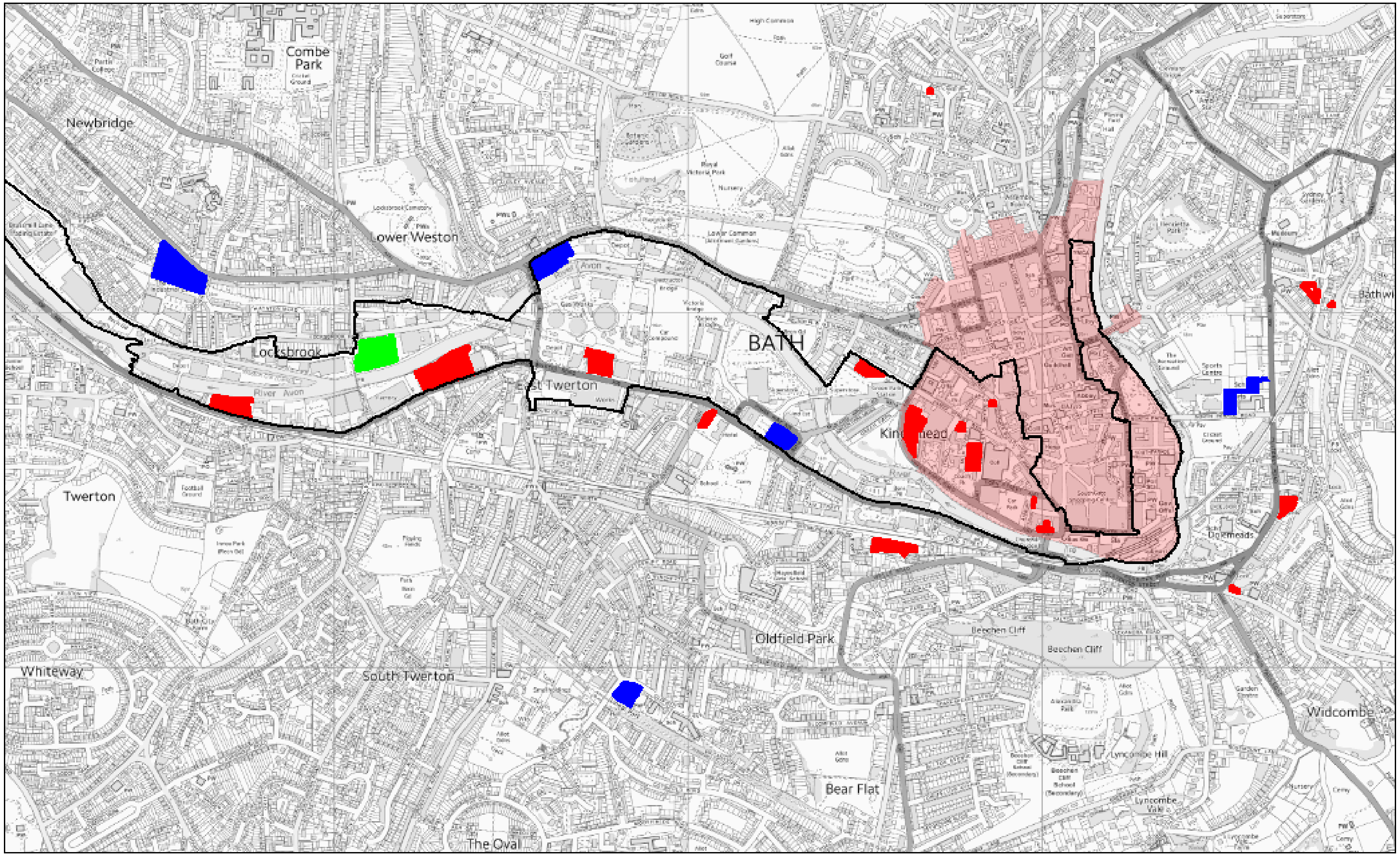
Policy B5 re Off-Campus Student Accommodation

Proposals for off-campus student accommodation will be refused within the Central Area, the Enterprise Area and on MoD land where this would adversely affect the realisation of other aspects of the vision and spatial strategy for the city in relation to housing and economic development.

Appendix 4 HMO Concentrations (December 2015)



Appendix 5: Footprint of built and permitted (red), and promoted (blue) off-campus student accommodation.



Application for teaching space (green). Application at Pinesgate for new language school with accommodation for half the students (300 of 600)