

**Bath & North East Somerset
Local Plan 2016 - 2036**

**Options Consultation
Winter 2018**

Topic Paper: Universities' Growth & Student Accommodation Requirements



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1. Introduction

- 1.1 This is the second topic paper produced to support the emerging Local Plan options. The main purpose of this paper is to set out future student accommodation requirements (chapter 4) in order to help inform the formulation of Local Plan policy options. As part of setting out the context for future requirements, this paper also presents student admission changes and the supply of student accommodation (chapter 2) and universities' growth projections (chapter 3).

2. Student admissions and Supply/Demand of Student Accommodation

Student admissions

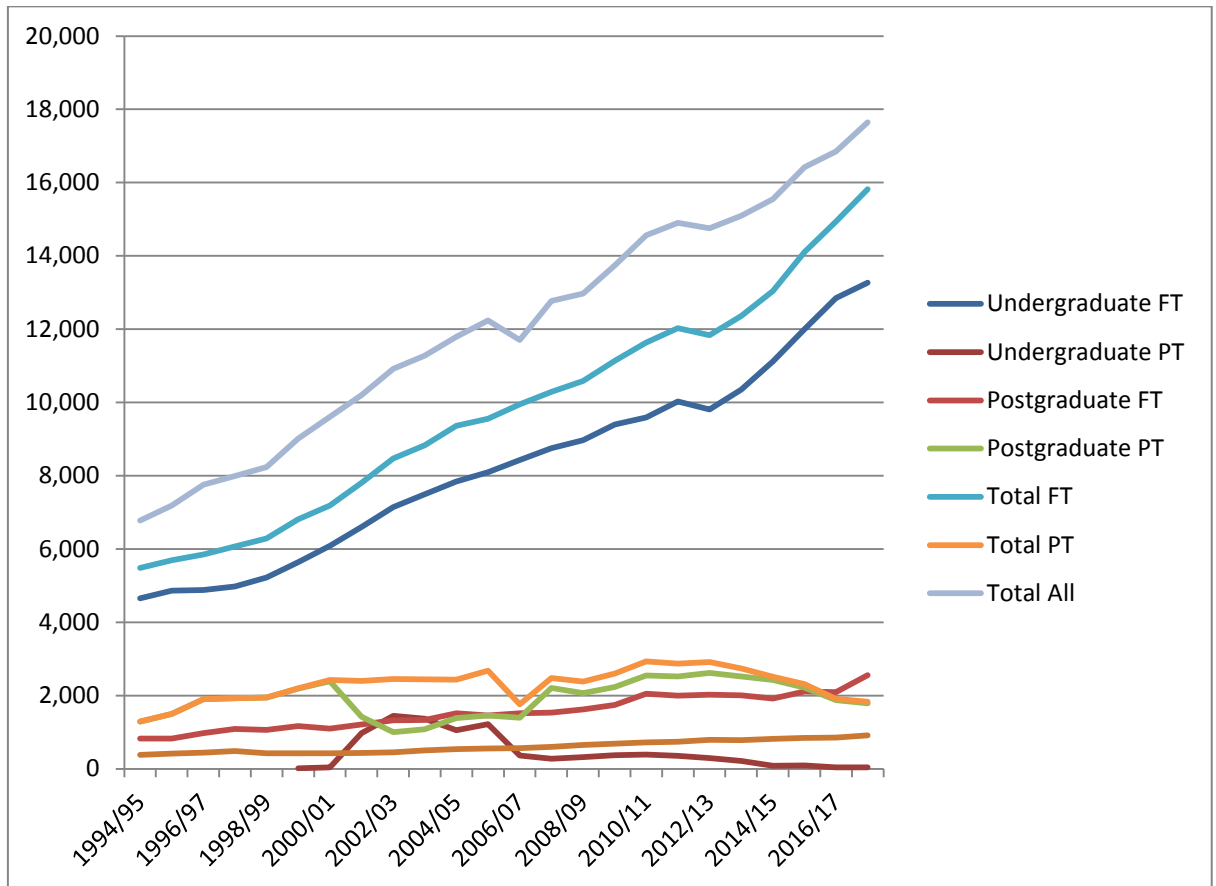
University of Bath

- 2.1 Table 1 and Diagram 1 show how the number of students enrolled at the University of Bath has increased since 2001/02. In the census period between 2001 and 2011, the student numbers of University of Bath (UoB) have increased from 10,205 to 14,565, a 4,360 increase (43% increase, average 4.3% per annum).
- 2.2 In the last 5 years, undergraduate admissions were increased to 13,303 in 2017/18 from 10,567 in 2013/14 with an annual average growth of 5.1%. Postgraduate admissions have declined from the highest admissions of 4,643 students in 2012/13 to 4,343 in 2017/18.

Table 1 The University of Bath

Year	Undergraduate		Total UG	Postgraduate				Total PG	Total FT	Total PT	Total All	Total Yearly Growth	Total Yearly Growth %
	FT	PT		FT	PT	FT	PT						
2001/02	6,599	977	7,576	781	1,194	430	224	2,629	7,810	2,395	10,205	595	6.2%
2002/03	7,147	1,450	8,597	874	735	447	269	2,325	8,468	2,454	10,922	717	7.0%
2003/04	7,494	1,365	8,859	831	793	503	288	2,415	8,828	2,446	11,274	352	3.2%
2004/05	7,844	1,052	8,896	979	1,068	536	316	2,899	9,359	2,436	11,795	521	4.6%
2005/06	8,099	1,222	9,321	901	1,144	554	315	2,914	9,554	2,681	12,235	440	3.7%
2006/07	8,430	363	8,793	952	1,078	564	317	2,911	9,946	1,758	11,704	-531	-4.3%
2007/08	8,751	277	9,028	943	1,844	595	360	3,742	10,289	2,481	12,770	1,066	9.1%
2008/09	8,968	321	9,289	971	1,749	647	314	3,681	10,586	2,384	12,970	200	1.6%
2009/10	9,394	369	9,763	1,060	1,896	682	337	3,975	11,136	2,602	13,738	768	5.9%
2010/11	9,589	385	9,974	1,325	2,153	721	392	4,591	11,635	2,930	14,565	827	6.0%
2011/12	10,029	350	10,379	1,263	2,098	738	424	4,523	12,030	2,872	14,902	337	2.3%
2012/13	9,812	297	10,109	1,230	2,213	795	405	4,643	11,837	2,915	14,752	-150	-1.0%
2013/14	10,350	217	10,567	1,226	2,122	780	401	4,529	12,356	2,740	15,096	344	2.3%
2014/15	11,122	87	11,209	1,103	1,997	814	425	4,339	13,039	2,509	15,548	452	3.0%
2015/16	12,002	95	12,097	1,262	1,744	844	472	4,322	14,108	2,311	16,419	871	5.6%
2016/17	12,845	36	12,881	1,247	1,366	848	508	3,969	14,940	1,910	16,850	431	2.6%
2017/18	13,265	38	13,303	1,639	1,210	915	579	4,343	15,819	1,827	17,646	796	4.7%

Diagram 2 The University of Bath



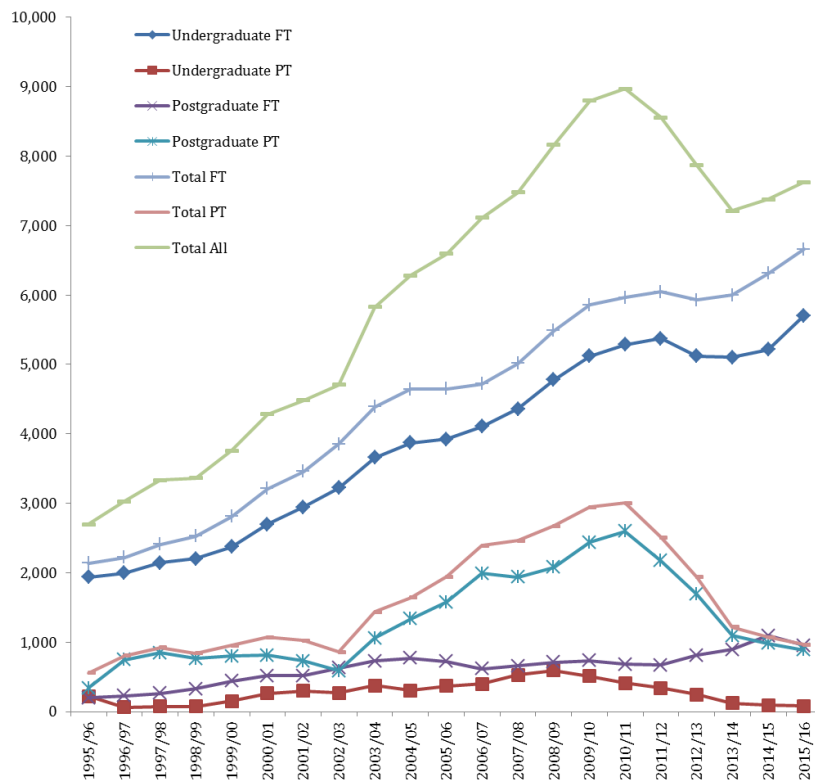
Bath Spa University

2.3 Table 2 and Diagram 2 show that the number of students enrolled at Bath Spa University (BSU). During the inter-census period between 2001 and 2011, the student numbers have increased from 4,485 to 8,970, a 4,485 increase (i.e. 100% at an average of 10% per annum). Numbers peaked in 2010/11 but declined due to a reduction in part-time undergraduates. The overall full-time admissions increased to 6,660 in 2015/16 from 6,045 in 2011/12 with an annual average growth of 2%. The overall part-time admissions declined from 2,510 in 2011/12 to 935 in 2015/16 with an annual average decline of 12.5%, resulting in an overall 11.2% decline from 2011/12 to 2015/16.

Table 2 Bath Spa University

	Undergraduate			Postgraduate			Total FT	Total PT	Total All	Total Yearly Growth	Total Yearly Growth %
	FT	PT	Total	FT	PT	Total					
2001/02	2,945	295	3,240	515	730	1,245	3,460	1,025	4,485	205	4.8%
2002/03	3,220	270	3,490	630	585	1,215	3,850	855	4,705	220	4.9%
2003/04	3,660	375	4,035	730	1,060	1,790	4,390	1,435	5,825	1,120	23.8%
2004/05	3,870	305	4,175	770	1,335	2,105	4,640	1,640	6,280	455	7.8%
2005/06	3,925	370	4,295	725	1,575	2,300	4,650	1,945	6,595	315	5.0%
2006/07	4,105	400	4,505	615	1,990	2,605	4,720	2,390	7,110	515	7.8%
2007/08	4,360	525	4,885	655	1,935	2,590	5,015	2,460	7,475	365	5.1%
2008/09	4,775	595	5,370	710	2,080	2,790	5,485	2,675	8,160	685	9.2%
2009/10	5,120	510	5,630	735	2,435	3,170	5,855	2,945	8,800	640	7.8%
2010/11	5,285	410	5,695	680	2,595	3,275	5,965	3,005	8,970	170	1.9%
2011/12	5,375	340	5,715	670	2,170	2,840	6,045	2,510	8,555	-415	-4.6%
2012/13	5,120	245	5,365	810	1,690	2,500	5,930	1,935	7,865	-690	-8.1%
2013/14	5,100	120	5,220	895	1,095	1,990	5,995	1,215	7,210	-655	-8.3%
2014/15	5,214	89	5,303	1,096	980	2,076	6,310	1,069	7,379	169	2.3%
2015/16	5,705	80	5,785	955	885	1,840	6,660	965	7,625	246	3.3%

Diagram 2 Bath Spa University



Supply of Student Accommodation

2.4 Many university students live in halls of residence, either purpose built or university-owned accommodation, but there are not enough places in halls of residence to accommodate all students. Most students not living in halls of residence or purpose built student accommodation will be living in private rented accommodation such as Houses in Multiple Occupation (HMO).

Purpose Built Student Accommodation (PBSA)

2.5 Table 3 shows all the PBSA bedspaces on and off campus. There are currently 7,596 PBSA bedspaces available and a further 502 spaces are permitted on and off campus (but unimplemented), resulting in a total supply of 8,098 bedspaces.

Table 3: PBSA supply (November 2018)

	On Campus	Off Campus	Off Campus Consented not built yet	Total
University of Bath	3,586	1,288*	346	5,220
Bath Spa University	872	1,392*		2,264
Private		458	156	614
Total	4,458	3,138	502	8,098 (7,596 built and 502 not built yet)

*Including nomination arrangements.

Private rented Sector

2.6 The data on private rented sector is more difficult to document. Table 4 shows the key housing information. There were 42,864 Local Land and Property Gazetteer (LLPG) registered properties in Bath (March 2017) and 2,249 properties are registered or known HMOs (Aug 2018). This includes the properties occupied by both student and non-students. The Council Tax record shows that 3,033 properties were subject to council tax student exemption in Oct 2017. This includes properties occupied solely by students, i.e. flats occupied by one or two students and not necessarily all HMOs.

Table 4: Key housing data

Information Source	Property numbers
Local Land and Property Gazetteer (LLPG) property numbers in Bath District Online data (Mar 17)	42,864 properties
Local Land and Property Gazetteer (LLPG) HMO registered property numbers in Bath (Aug 2018) *This excludes some HMOs outside the additional licensing area. This also includes non-Student HMOs.	2,249 properties
Student Properties (Student Council Tax Exempt Properties Oct 2017) *This includes non HMO properties such as flats occupied by one or two students	2,563 properties
Total 2011 Census HMO properties Student HMOs non-Student HMOs	3,503 properties 1,748 1,755

(NB the different sources of the figures mean that they are not necessarily comparable.)

- 2.7 B&NES introduced an Additional Licensing scheme in 2014 and it will be extended city wide from the 1st January 2019 for another five years. It means that after 1st January, all small and large HMOs will require a license. (Deadline to apply is by 31st December) The licensing regime will help address the safety and quality of HMO properties, as well as help the Council to better understand exact locations and number of the HMO properties.

Change of Use from C3 (Family Home) to C4 (HMO)

- 2.8 The Council introduced the Article 4 Direction to withdraw Permitted Development Rights for the change of use from family homes (Use Class C3) to Houses in Multiple Occupation (Use Classes C4 and Sui Generis) across the City of Bath in 2013. Since then, a total of 229 planning applications for a change of use have been received, of which 213 applications were permitted.

Table 5 Change of Use from C3(Family Home) to C4(HMO)

	Total	Permitted	Permitted; for Non- students	Permitted for Students Council tax exempt	Refused
13/14	21	19	8	11	2
14/15	38	36	13	23	2
15/16	45	43	21	22	2
16/17	64	59	34	25	5
17/18	61	56	Not yet analysed		5
Total	229	213			16

3. University Growth Plans

The University of Bath

- 3.1 Table 6 shows the University of Bath (UoB) student number forecast up to 2035/36. The priority for the UoB is to increase the size of its postgraduate student population and stabilise the size of its undergraduate intake and focus on enhancing the student experience. As a result, the University forecasts only modest growth in its undergraduate population reflecting the pipeline effect of stabilising its undergraduate intake at 2015 levels whilst forecasting growth in its postgraduate numbers.
- 3.2 Given the unprecedented levels of uncertainty surrounding the mid to long term future of UK Higher Education funding and recruitment patterns, the UoB is forecasting minus 1.0% to plus 1.0% per annum growth beyond 2022/23. Therefore it is agreed that the Local Plan is based on maintaining numbers at the forecast 2022/23 level through to 2035/36. The forecast will be revisited as part of the 5 year review following the adoption of the Plan.
- 3.3 Not all students require student accommodation, for example they may be living at family homes, part-time students or distant learning students. It is assumed that 78% of the total student population requires student accommodation. Based on this assumption **14,336 students** studying at the University of Bath require student accommodation by 2020/21. This is a 592 increase in students requiring accommodation from the 2018/19 intake.

**Table 6 University of Bath
Forecasts and total students require accommodation**

Factor	2016/ 17	2017/ 18	2018/ 19	2019/ 20	2020/ 21	2021/ 22	2022/ 23	2023/ 24	2024/ 25	2025/ 26	2035/ 36
Student Forecast	16,880	17,646	17,620	17,950	18,380	18,490	18,500	18,500	18,500	18,500	18,500
Housing Need (approx:78 % of total student no)	13,166	13,764	13,744	14,001	14,336	14,422	14,430	14,430	14,430	14,430	14,430

Bath Spa University

- 3.4 Table 7 shows the Bath Spa University student number forecast up to 2035/36. The University is reviewing future growth and its estate management, potentially consolidating its estate & sites presence within the city. Their growth plan shows a reduction of student numbers in the next few years followed by a steady increase. The university has indicated an estimated increase of 100 students per annum from the forecast 2022/23 level through to 2035/36.
- 3.5 As Bath Spa University has more students living at their family homes and part time students, a lower multiplier is used to calculate the student population requiring accommodation. Applying the multiplier of 56% (agreed with Bath Spa University), 4,608 students studying at Bath Spa University require student accommodation in 2020/21.

**Table 7 Bath Spa University
Forecasts and total student require accommodation**

Factor	2016 /17	2017 /18	2018 /19	2019 /20	2020 /21	2021 /22	2022 /23	2023 /24	2024 /25	2025 /26	2035 /36
Bath Spa Student Forecast	8,269	8,325	8,247	8,139	8,228	8,352	8,507	8,600	8,700	8,800	9,800
Bath Spa Housing Need All (approx: 56% of total student no)	4,631	4,662	4,618	4,558	4,608	4,677	4,764	4,816	4,872	4,928	5,488

4. The current and forecast demand for student accommodation vs current and forecast supply

- 4.1 In this section the findings for each University are merged to provide a comprehensive view of current and future student numbers, accommodation needs arising, the available supply of dedicated space (current and forthcoming) and residual needs to be met by additional dedicated space (PBSA) or the private rent sector.
- 4.2 Table 8 shows that student population will increase by **2,151** for the first 10 years of the Plan period equating to a **1,561** additional student population requiring accommodation. 7,066 PBSA bedspaces were available at the beginning of this period and anticipated to increase to 8,098 bedspaces taking into account the schemes consented recently. During this period, **1,032 bedspaces** were delivered or will be delivered if all consented planning permissions are implemented.
- 6.3 'The total student housing need' minus 'total available PBSA bedspaces' shows the residual demand which is assumed to be accommodated by the private rented sector. In 2018/19, it is assumed that 10,776 students were living in the private rented sector such as HMOs and their own flats. Taking this as the baseline, the residual demand will increase to 11,260 bedspaces by 2020/21, resulting in a net increase of **494 bedspaces**.
- 6.4 In terms of a strategy, this would need to be met by building more dedicated accommodation or additional housing provision if further pressure on the general housing stock is to be minimised. As a reference, 494 bedspaces is assumed to be **equivalent to 124 HMOs** (based on one HMO = four bedspaces).

Table 8 Combined forecast demand for student accommodation based on the Universities' Growth Plans

Factor	2016 /17	2017 /18	2018 /19	2019 /20	2020 /21	2021 /22	2022 /23	2023 /24	2024 /25	2025 /26	2035 /36
Uni Bath Student Forecast	16,880	17,646	17,620	17,950	18,380	18,490	18,500	18,500	18,500	18,500	18,500
Bath Spa Student Forecast	8269	8325	8,247	8,139	8,228	8,352	8,507	8,600	8,700	8,800	9,800
Total Student Forecast	25,149	25,971	25,867	26,089	26,608	26,842	27,007	27,100	27,200	27,300	28,300
Uni Bath Housing Need (approx:78% of total student no)	13,166	13,764	13,744	14,001	14,336	14,422	14,430	14,430	14,430	14,430	14,430
Bath Spa Housing Need All (approx:56%)	4,631	4,662	4,618	4,558	4,608	4,677	4,764	4,816	4,872	4,928	5,488
Total Housing Need	17,797	18,426	18,362	18,559	18,944	19,099	19,194	19,246	19,302	19,358	19,918
Uni Bath on-campus	3,293	3,586	3,586	3,586	3,586	3,586	3,586	3,586	3,586	3,586	3,586
Bath Spa on-campus	872	872	872	872	872	872	872	872	872	872	872
Uni Bath off-campus	1,051	1,288	1,288	1,288	1,492	1,634	1,634	1,634	1,634	1,634	1,634
Bath Spa off-campus	1,392	1,392	1,392	1,392	1,392	1,392	1,392	1,392	1,392	1,392	1,392
Private	458	458	458	551	614	614	614	614	614	614	614
Beds Total	7,066	7,596	7,596	7,689	7,956	8,098	8,098	8,098	8,098	8,098	8,098
Cumulative residual demand	10,731	10,877	10766	10870	10988	11001	11096	11148	11204	11260	11820
Residual cumulative demand if no further PBSAs are built from 2018/19 9 (bedspaces)				104	222	235	330	382	438	494	1054
Residual cumulative demand – HMO equivalent if no further PBSAs are built from 2018/19 (1 dwelling = 4 bedspaces)				26	56	59	82	96	110	124	264