

**Bath & North East Somerset
Local Plan (Core Strategy /Placemaking Plan)**

2011-2029

Partial Update

**Draft (Reg 19) Consultation
August 2021**

Topic Paper:

Student Accommodation

**Bath & North East
Somerset Council**

Improving People's Lives

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1. Introduction

- 1.1 This topic paper supports the preparation of the Reg 19 pre-submission draft Local Plan Partial Update. The main purpose of this paper is to set out future student accommodation demand in order to inform the formulation of Local Plan policy approach. As part of setting out the context for future demand, this paper also presents student admission changes and the supply of student accommodation and universities' growth projections.
- 1.2 There are considerable uncertainties around the Higher Education sector as the global and national landscape for Higher Education Institutions is rapidly changing. These include economic, political and social changes including the relationship between the UK and EU and technological changes, as well as the impacts of the Covid-19 pandemic and recovery in the post-Covid era. Therefore, the information contained in this report needs to be understood in the context of other uncertain influencing factors.

2. Supply of Student Accommodation

- 2.1 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).
- 2.2 Table1 shows all the Purpose Built Student Accommodation (PBSA) bedspaces on and off campus. There are currently 7,689 PBSA bedspaces available and a further 661 spaces are permitted on and off campus (but not yet completed), resulting in a total supply of 8,350 bedspaces.
- 2.3 Recent permissions include:
- 17/04338/FUL Bath Cricket Ground 136 bedspaces (nomination agreement with the UoB)
 - 17/03774/OUT 34-35 Lower Bristol Road (former Pickford) 204 bedspaces (nomination agreement with the UoB)
 - 18/02831/FUL The Old Bakery, Jews Lane 63 bedspaces
 - 19/01854/OUT Hartwell 186 bedspaces
 - 20/00023/FUL Plumb Centre, Lower Bristol Road 72 bedspaces

Table1: PBSA supply (Aug 2021) *Including nomination arrangements.

	On Campus	Off Campus	Off Campus	Total
			Consented not yet completed	
University of Bath	3,586	1,288*	340	5,214
Bath Spa University	872	1,115*		1,987
Private		828	311	1,139
Total	4,458	3,231	589	8,350 (7,689 built and 661 not built yet)

3. University Growth Plan for the University of Bath (UoB)

- 3.1 Table 2 shows 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 UoB have increased from 10,205 to 14,565, a 4,360 increase (43% increase, average 4.3% per annum).
- 3.2 In the last 5 years, the total number of students admissions increased to 19,041 in 2020/21 from 16,850 in 2016/17 with an annual average growth of 3%. However, there are a number of factors affecting future student admissions and these will be discussed below.

Table 2 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		Taught	Research		PG						
	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%
2018/19	13,379	24	13,403	1,738	1,371	988	603	4,700	16,105	1,998	18,103	457	2.6%
2019/20	13,604	15	13,619	1,834	1,835	990	590	5,249	16,428	2,440	18,868	765	4.2%
2020/21	13,587	2	13,589	1,618	2,180	1045	609	5,452	16,250	2,791	19,041	173	0.9%

- 3.3 Table 6 shows the UoB student number forecast up to 2029/2030. The priority for the UoB at the Pre-Covid time was 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 was forecasting 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.
- 3.4 The UoB has recently published its new University Strategy 2021-2026 ([link](#)) which continues to prioritise maintaining its strong performance in student satisfaction and employability at both undergraduate and postgraduate levels. The University is responding to the changing landscape for Higher Education Institutions due to increased international competition and complexity, evolving policies in the UK, and pressures on university finances. The recent past has underlined the need for increased agility.
- 3.5 Due to the impact of Covid-19, undergraduate and postgraduate international student numbers are likely to reduce, but home student numbers may potentially increase following 'A' level grade inflation in 2021. The University is not clear when any degree of stability will return to its student recruitment markets and how covid, Brexit and other policy changes will impact its cost base. This increases the challenge of forecasting future student numbers and assessing the demand for new facilities.
- 3.6 The University Strategy 2016-21 prioritised an increase in the size of its postgraduate student population, both taught postgraduates and doctoral students. At the same time, it stabilised the size of its undergraduate intake cohort and focussed on enhancing the student experience. As a result, the University forecast only modest growth in its undergraduate student population over this period, reflecting the pipeline effect of stabilising its undergraduate intake at its 2015 levels, whilst forecasting significant growth in its postgraduate numbers. Recognising the finite capacity of both the Campus and the City, the University has also sought to increase its postgraduate student numbers in ways that do not generate demand for residential accommodation in the B&NES area.
- 3.7 The University launched the Masters level degree apprenticeship in 2018/19. This is delivered using a variety of distance-learning techniques with apprentices only required to attend Campus periodically for face-to-face, one-day Masterclasses. The University has also partnered with Wiley Global Educational Services to develop a range of online programmes. The online provision does not require any campus attendance and is a rapidly growing market for the University. The new University Strategy 2021-26 continues to support the development of online provision and innovative delivery models, including degree apprenticeships. The enrolment for these courses so far is;

Table 3

	Degree Apprenticeship	Distance Learning	Total students with no accommodation requirements
2018/19	15 students	36 students	51 students
2019/20	53 students	350 students	403 students
2020/21	89 students	1,059 students	1,148 students

- 3.8 The new University Strategy 2021-26 continues to support the development of online provision and innovative delivery models, including degree apprenticeships and forecast between 0%-1.5% growth per annum in the next 5 years up to 2025/26. Beyond this point it is difficult to forecast. Therefore, for the purpose of this study, the highest growth rate of 1.5% is used up to 2025 for all students, alongside continued growth for the Master's degree apprenticeship and Distance Learning through the Plan period.

Accommodation demand

- 3.9 Not all students require student accommodation, for example they may be living at family homes or part-time students. It is assumed that 78% of the total student population requires student accommodation. For example, of 17,646 students studying at the University, 13,763 students required accommodation in Bath in 2017/18. However as explained above, the University is increasing the number of postgraduate students through the master's apprenticeship and Distance Learning in ways that do not generate demand for residential accommodation in Bath. Therefore, these students who clearly do not require accommodation in Bath need to be removed from the accommodation demand forecast and 78% of the remaining students will be assumed to require student accommodation.
- 3.10 Table 4 sets out the student numbers and associated accommodation demand. The second row shows the total student forecast, the third row shows the total Master's degree apprenticeship and Distance Learning forecast numbers, the fourth row shows the number of students who enrolled for the Master's degree apprenticeship and Distance Learning and the last row shows the number of students assumed to require accommodation in Bath. As explained above, the number of students enrolled for the Master's degree apprenticeship and Distance Learning are removed from the accommodation demand calculation. It shows that 14,922 students are assumed to require accommodation in Bath by the end of the Plan period.

Table 4 University of Bath: The student numbers and accommodation demand forecast

Factor	2018 /19	2019 /20	2020 /21	2021 /22	2022 /23	2023 /24	2024 /25	2025 /26	2026 /27	2027 /28	2028 /29	2029 /30
UoB Student Forecast	18,052	18,465	17,893	19,190	19,382	19,576	19,771	19,969	19,987	20,006	20,024	20,043
DA and DL total	51	403	1,148	1,159	1,171	1,183	1,195	1,207	1,225	1,243	1,262	1,281
UoB Student Forecast without DA and DL	18,001	18,062	16,745	18,031	18,211	18,393	18,577	18,763	18,763	18,763	18,763	18,763
UoB Housing Need (approx:78% of total student no.)	14,041	14,088	13,061	14,064	14,204	14,346	14,490	14,635	14,635	14,635	14,635	14,635

4. University Growth Plan for Bath Spa University (BSU)

4.1 Table 5 shows that the number of students enrolled at Bath Spa University (BSU). During the inter-census period between 2001 and 2011, student numbers 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 5 Bath Spa University (source: 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%
2016/17									7,980	355	4.7%
2017/18									7,990	10	0.1%
2018/19									7,770	-220	-2.8%
2019/20									7,222	-548	-7.1%
2020/21									6,819	-403	-5.6%

4.2 Table 7 shows the Bath Spa University student number forecast up to 2029/30. The University is reviewing its future growth and estate management, consolidating its estate & sites presence within the city. The new University's Estate Strategy focuses development into two campuses; Newton Park and a new campus area around Locksbrook Road with sustainable travel links between the two campuses. Consolidation of its creative facilities around the Locksbrook area will help to create 'walkable' campuses as it is close to purpose built student accommodation. The expansion of the Locksbrook Campus will enable opening the facilities for use beyond the academic timetable and enrolled students within a wider creative zone. This will provide a good

opportunity to help enhance creative industry within Bath and play an important role in helping the City recover from the pandemic and its effects on employment and skills, and will encourage new businesses. The Local Plan Partial Update facilitates such changes, particularly through Policy SB22 allocating the Locksbrook Creative Industrial Hub and Policy SB24 to redevelop the Sion Hill campus for housing.

- 4.3 The student admission number was much lower in 2020/21 than previously expected. This is partly from the impact of the Covid 19 pandemic. The University is expecting to gradually get back to the level envisaged in the 2030 strategy i.e. 9,300 by 2030.

Accommodation demand

- 4.4 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. The multiplier of 56% (agreed with Bath Spa University) is used. For example, of 6,819 students studying at the University, 3,819 students required student accommodation in Bath in 2020/21.

Table 7 Bath Spa University: The student numbers and accommodation demand forecast

Factor	2019 /20	2020 /21	2021 /22	2022 /23	2023 /24	2024 /25	2025 /26	2026 /27	2027 /28	2028 /29	2029 /30
Total Student Forecast	7,222	6,819	6,994	7,123	7,478	7,914	8,291	8,742	8,928	9,113	9,299
Total Housing Need (58% of total student number)	4,044	3,819	3,917	3,989	4,188	4,432	4,643	4,896	5,000	5,103	5,207

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

- 5.1 In this section the findings for both Universities are merged to provide a comprehensive view of current and future student numbers, the 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.
- 5.2 Table 8 shows that total student population will increase across the two universities by 1,932 from 2018 to 2029 equating to a 1,206 additional student population requiring accommodation. 7,540 PBSA bedspaces were available at the beginning of this period and anticipated to increase to 8,350 bedspaces taking into account the schemes consented recently.
- 5.3 '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 10,852 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 11,492 bedspaces by 2029/30, resulting in a net shortfall of 640 bedspaces to meet the forecasted demand to meet the current requirements of both Universities.
- 5.4 In terms of 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, 640 bedspaces is assumed to be equivalent to 160 HMOs (based on one Houses in Multiple Occupation (HMO) = four bedspaces) based on the local HMO information.
- 5.5 Therefore, the Council has worked closely with the University of Bath to review the masterplan for the Claverton Campus and Local Plan Partial Update proposes to revise Policy SB19 to reflect the emerging masterplan and associated evidence base. Policy SB19 sets out the development capacities for both academic (48,000 sqm) and student accommodation (870 bedspaces) on campus and detailed development requirements to provide a clear steer to new development. The timing of the delivery of these student bedspaces is not clear yet therefore it is not included in Table 8. Also the additional demand would start to increase at the second half of the remaining Plan period which will correspond with the increased anticipated demand during this period to meet increased demand from 2025 onwards.
- 5.6 The expected shortfall identified is 640 bedspaces, but taking into account 870 bedspaces allocated on Claverton Campus, the surplus of 230 bedspaces could start to address the pressure on HMOs. However, in order to ease the pressure on the HMOs the right type of purpose built student accommodation (PBSA) with the right levels of rents should be offered, including accommodating follow on students (2nd and 3rd year and undergraduate students). Otherwise building more PBSA could potentially lead to an increase in the first year student numbers adding more pressure to the general housing in Bath. Therefore, the Local Plan Partial Update introduces new Policy H2a to manage new PBSAs. Clearly this is a strategic issue for the District and will be closely monitored and reviewed through the new Local Plan.

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

Factor	2018 /19	2019 /20	2020 /21	2021 /22	2022 /23	2023 /24	2024 /25	2025 /26	2026 /27	2027 /28	2028 /29	2029 /30
UoB Student Forecast	18,001	18,062	16,745	18,031	18,211	18,393	18,577	18,763	18,763	18,763	18,763	18,763
BSU Student Forecast	7,770	7,222	6,819	6,994	7,123	7,478	7,914	8,291	8,742	8,928	9,113	9,299
Total Student Forecast	25,771	25,284	23,564	25,025	25,334	25,871	26,491	27,054	27,505	27,691	27,876	28,062
UoB Housing Need (approx:78%)	14,041	14,088	13,061	14,064	14,204	14,346	14,490	14,635	14,635	14,635	14,635	14,635
BSU Housing Need All (approx:56%)	4,351	4,044	3,819	3,917	3,989	4,188	4,432	4,643	4,896	5,000	5,103	5,207
Total Housing Need	18,392	18,133	16,880	17,980	18,193	18,534	18,922	19,278	19,530	19,635	19,738	19,842
UoB on-campus PBSA	3,543	3,586	3,586	3,586	3,586	3,586	3,586	3,586	3,586	3,586	3,586	3,586
BSU on-campus PBSA	872	872	872	872	872	872	872	872	872	872	872	872
UoB off-campus PBSA	931	1,288	1,492	1,628	1,628	1,628	1,628	1,628	1,628	1,628	1,628	1,628
BSU off-campus PBSA	1,392	1,115	1,115	1,115	1,115	1,115	1,115	1,115	1,115	1,115	1,115	1,115
CRM Private PBSA	802	828	891	891	1,077	1,149	1,149	1,149	1,149	1,149	1,149	1,149
Beds Total	7,540	7,689	7,956	8,092	8,278	8,350	8,350	8,350	8,350	8,350	8,350	8,350
Residual demand 2018/19 assumed to be met by HMOs	10852	10444	8924	9888	9915	10184	10572	10928	11180	11285	11388	11492
Additional bedspaces required to meet the forecasts (cumulative total)	0	-408	-1928	-964	-937	-668	-280	76	328	433	536	640