

Cambridge Centre
for Housing &
Planning Research

Assessment of Student Housing Demand and Supply for Cambridge City Council

Report to Cambridge City Council

January 2017

Dr Gemma Burgess

Michael Jones

Dr Charlotte Hamilton

Contents

1	Executive summary	3
2	Main report: introduction.....	13
3	Methodology.....	19
4	Baseline analysis.....	24
5	Existing and future projections for PBSA.....	55
6	Local authority review.....	69
7	Policy discussion	76
8	Appendices	82

1 Executive summary

- 1.1 Cambridge City Council commissioned this study to help to inform planning policy with regard to the provision of student accommodation and its impact upon housing need. The aim is to provide evidence to inform discussions about the need for, and supply of, student accommodation in relation to the emerging Local Plan.
- 1.2 The report includes a baseline analysis of the current structure of the student population, the current accommodation of students, and the future plans of the different educational institutions. It analyses what the level of purpose-built student accommodation (PBSA) could be if all current and potential future students were to be accommodated in PBSA, rather than, for example, in shared housing in the private rented market. The report also reviews relevant planning policies adopted or proposed by other local authorities experiencing particular pressure from student numbers.

The sources of data

- 1.3 The data used in the analysis comes from two main sources. The first source is the Higher Education Statistics Agency (HESA) returns made by the University of Cambridge and Anglia Ruskin University. For the purposes of this research, part-time students are excluded from the analysis of the HESA data based on the assumption that they are already housed for the duration of their part-time studies.
- 1.4 The second source of data is an online survey that was used to collect data from individual institutions about their student profile, current accommodation provision, and future planned provision. The University of Cambridge Colleges and wider University of Cambridge were included in the study, as was Anglia Ruskin University. The non-university institutions excluded the standard school sector but included the Further Education (FE) colleges (e.g. Cambridge Regional College), language schools (e.g. Bell Educational Services Ltd), performing arts colleges (e.g. Cambridge School of Visual and Performing Arts), theological colleges (e.g. Wesley House), independent sixth forms (e.g. Mander Portman Woodward) and summer schools (e.g. Reach Cambridge).

Counting the number of students is not straightforward

- 1.5 One issue that needs highlighting is that student numbers can appear to vary, quite legitimately, depending on what source or definition is used. Counting students, even for institutions, is quite difficult. There are discrepancies between the data provided through the online survey and the data extracted from the HESA returns. This relates in part to which students are included in the data. It also reflects the self-reported nature of the HESA data. A key issue identified is that the analysis suggests that some students who select 'Own permanent residence owned or rented by you' are in fact occupying shared houses.

Key assumptions and projections

- 1.6 The data analysis made assumptions about the average number of students in a shared property. According to Cambridgeshire County Council's research team, one dwelling provides accommodation for 3.5 students, on average. However, the data collected from the University of Cambridge Colleges showed that shared houses that are rented for use by students in the open market house an average of 5 students per property. The data analysis therefore estimates the number of shared houses based on the average of both 3.5 and 5 students per property, and provides a range.
- 1.7 The analysis of the future potential for PBSA has a projection for 10 years to 2026. Although the Local Plan period runs to 2031, there is a considerable lack of certainty about potential future growth in the universities which means that 10 years is the maximum projection that can be made using realistic data.
- 1.8 **The current and future potential for PBSA is the amount of PBSA that would be needed to accommodate all of the students who are not currently housed by their educational institution or living in existing family housing, and those students generated by the future growth proposals of the institutions.**

Full-time and part-time students

- 1.9 A quarter of all the students in Cambridge, 12,714 out of a total of 49,426, are studying on part-time courses, defined as ones that last for less than an academic year (Table 1).
- 1.10 These cover a very wide range of courses, from apprentices on day release at Cambridge Regional College to managers studying for an Executive MBA and in Cambridge for a number of long weekends spread over a two-year period.
- 1.11 In nearly all cases, part-time students will be living in either their parental home or their own home, in homestay accommodation, or accommodated in existing PBSA during the vacation periods.
- 1.12 This report assumes that part-time students do not therefore create any demand for accommodation in excess of that provided for full-time students. Part-time students at the two universities are therefore not included in any of the analysis of the current and future potential for PBSA later in this report. Part-time students at the other educational institutions are included in Table 2, and discussed in detail in the report, because their accommodation is more diverse than that of the university student population.

All full time and part time students				
	Full time		Part time	
	Undergraduate	Postgraduate	Undergraduate	Postgraduate
University of Cambridge	11,815	9,412	310	1,549
Anglia Ruskin University	8,153	1,332	574	861
Subtotal	19,968	10,744	884	2,410
Other educational institutions	6,000		9,420	
Total	36,712		12,714	
Overall total	49,426			

Table 1: All full-time and part-time students

Current student housing profile

- 1.13 The table overleaf (Table 2) summarises the data for each of the two universities (based on HESA returns), the total position for the two universities together, the data for the non-university educational institutions (based on the online survey conducted for this research), and overall totals for the student population in Cambridge.
- 1.14 The table classifies the seven types of accommodation used for HESA returns, plus a category for 'homestay' students, into four broad groups:
- PBSA, which includes University/College maintained accommodation and private halls.
 - Shared existing housing, which includes both 'Own permanent residence either owned or rented by you' and 'Other rented accommodation (shared with others on a temporary basis)'.
 - Existing family housing, which includes the parental home and 'homestay'.
 - No information, which includes the 'other' and 'not known' categories in the HESA data.

Baseline: 2015/16 student accommodation: numbers of students										
		Purpose Built Student Accommodation		Shared existing housing		Existing family housing		No information		
		University/College maintained	Private halls	Other rented	Own home	Parental/guardian home	Homestay	Other	Not known	Total
University of Cambridge	Undergraduate	10745	44	503	226	22		13	262	11815
	Postgraduate (1 year)	2240	59	212	220	68		26	277	3102
	Postgraduate (2+ years)	2890	241	1278	1293	78		105	425	6310
	Subtotal	15875	344	1993	1739	168		144	964	21227
Anglia Ruskin University	Undergraduate	901	435	2090	2195	2091		347	94	8153
	Postgraduate (1 year)	156	50	295	219	131		41	28	920
	Postgraduate (2+ years)	45	18	132	139	45		27	6	412
	Subtotal	1102	503	2517	2553	2267		415	128	9485
Total Universities	Undergraduate	11646	479	2593	2421	2113		360	356	19968
	Postgraduate (1 year)	2396	109	507	439	199		67	305	4022
	Postgraduate (2+ years)	2935	259	1410	1432	123		132	431	6722
	Total Universities	16977	847	4510	4292	2435		559	1092	30712
Non-university institutions		750	3836	355	0	5304	4390	0	785	15420
	Total all institutions	17727	4683	4865	4292	7739	4390	559	1877	46132

Table 2: Number of students and accommodation in Cambridge 2015/16

1.15 The table below (Table 3) shows a summary of the overall student numbers by the four broad categories of accommodation type.

Baseline: 2015/16 student accommodation: numbers of students by broad category of accommodation					
	Purpose Built Student Accommodation	Shared existing housing	Existing family housing	No information	Total
University undergraduate	12125	5014	2113	716	19968
Postgraduate (1 year)	2505	946	199	372	4022
Postgraduate (2+ years)	3194	2842	123	372	6531
Total university	17824	8802	2435	1651	30712
Non-university institutions	4586	355	9694	785	15420
Total all institutions	22410	9157	12129	2436	46132

Table 3: Number of students by accommodation type in Cambridge 2015/16

1.16 Key points:

- a. **There are an estimated 46,132 students in Cambridge with a need for some form of accommodation.** Of these, 22,410 are housed in PBSA, an estimated 9,157 are in shared housing, 12,129 are in existing family housing (either in the parental home or 'homestays'), and there is no information for 2,436 students.
- b. 91% of undergraduates and 55% of postgraduates at the University of Cambridge are in University or College maintained accommodation, compared to 11% of undergraduates and 15% of postgraduates at Anglia Ruskin University.
- c. **Anglia Ruskin University is therefore currently dependent upon housing 4,285 undergraduates and 785 postgraduates in shared housing,** a total of 5,070 students, occupying at least 1,000 shared houses, assuming an average of 5 students to each shared house.
- d. The position is reversed for **the University of Cambridge, where only 729 undergraduates are housed in shared existing housing, but 3,003 postgraduates are accommodated in shared existing housing,** occupying at least 600 shared houses, again assuming an average of 5 students to each shared house.
- e. The non-university institutions have very little directly owned accommodation (750 bed spaces among 15,420 students), but make extensive use of private halls (3,836 bed spaces, or 82% of all student accommodation in private halls).
- f. **The non-university institutions also house 4,390 students in 'homestay' accommodation,** and a further 5,304 are living in the parental home (mainly Cambridge Regional College students).
- g. **The non-university institutions also make relatively little use of shared housing,** with only 355 students accommodated in shared housing, or only 2% of the total number of non-university institution students.

Existing and future projections for PBSA

1.17 This section of the study discusses the amount of PBSA that could be needed to accommodate all of the students who are not currently housed by their educational institution or living in existing family housing.

1.18 The table below (Table 4) summarises the overall position for university student accommodation in the city. It presents an estimate of the level of PBSA that, if built, could absorb all students currently living in shared houses in the city (including in this category both 'other rented' and 'own home'). The estimate is calculated by deducting from the total number of students:

- All those already living in PBSA.
- All those currently living in the parental home.
- All those for whom there is no information.

1.19 This would result in 8,802 bed spaces, which if provided in PBSA could allow the return of all shared houses currently occupied by students to the open market.

Two universities: summary of existing accommodation and potential for PBSA									
	Total	Purpose Built Student Accommodation		Estimated number of houses currently shared		Existing family housing	No information		PBSA level
		University / College	Private halls	Other rented	Own home	Parental home and homestay			
Undergraduate	19968	11646	479	2593	2421	2113	360	356	5014
Postgraduate (1 year)	4022	2396	109	507	439	199	67	305	946
Postgraduate (2+ years)	6722	2935	259	1410	1432	123	132	431	2842
Total Universities	30712	16977	847	4510	4292	2435	559	1092	8802

Table 4: Maximum potential level of PBSA to address current student numbers for the university sector

Taking account of the increasing diversity of the student population

1.20 The estimate in the table above is clearly a 'maximum' position, which assumes that all students, irrespective of their age, type of course, or personal preferences, would choose to live in PBSA if it were available. It also assumes that the students who self-reported that they live in 'other rented' accommodation and their 'own home' currently share housing. The two universities have different characteristics, and the research developed estimates for Anglia Ruskin University and the University of Cambridge separately, based on their different student profiles and future growth plans.

1.21 This reduced the estimate of the level of PBSA, by excluding, for example, mature students who are less likely to be living in shared housing. **This resulted in a figure**

of 6,085 bed spaces, which if provided in PBSA could allow the return of all shared houses currently occupied by students to the open market.

The implications of potential future growth in student numbers

1.22 The research then analysed the impact of the growth plans of the universities. Anglia Ruskin University is planning to remain at the same student numbers in Cambridge over the next five to ten years. The University of Cambridge's current planning framework envisages an expansion in undergraduate numbers of 0.5% per year for the next ten years, and in postgraduate numbers of 2% per year.

1.23 The table below (Table 5) summarises the current and future potential for PBSA for the university sector.

Overall potential for PBSA in university student accommodation		
	Potential level of PBSA to house current students @ 2016	Potential additional level of PBSA to house growth in students @ 2026
Anglia Ruskin University	2803	
University of Cambridge	3282	2874
Total	6085	2874

Table 5: Overall potential level of PBSA to address current and future potential student numbers for the university sector

1.24 Table 5 suggests that a total of **8,959 student rooms would need to be built in PBSA by 2026** if both the current and the future potential levels of student accommodation were to be met. This would accommodate all of the students who are not currently housed by their educational institution or living in existing family housing, and would allow the return of all shared houses currently occupied by students to the open market.

The numbers of existing houses that could be returned to the open market

1.25 Meeting the current student numbers through provision of PBSA **might release between 1,200 (based on 5 students per shared house) and 1,700 houses (based on 3.5 students per shared house), currently occupied by students sharing, into the open market.**

1.26 **If PBSA is not available to meet future growth, then by 2026, between 656 (based on 5 students per shared house) and 821 (based on 3.5 students per shared house) additional existing houses would need to be converted into shared student accommodation in order to meet demand.**

- 1.27 As at the 31st of March 2016, there were 1,281 student bed spaces in the planning pipeline. Once completed, and provided they are occupied by students, this will reduce the current level of students outside PBSA from 6,085 to 4,804, and reduces the future potential level of students outside PBSA from 8,959 student bed spaces to 7,678.
- 1.28 These estimates are dependent upon the assumptions concerning: the numbers of students actually occupying 'Own permanent residence owned or rented by you'; the average numbers of students actually occupying shared houses; the actual growth rate of the universities, and the quality of the self-reported HESA data. Data were triangulated using different sources (e.g. HESA data, data from the online surveys and data from interviews). The estimates are as robust as possible based on the available data.

Local authority review

- 1.29 The research conducted a review of the relevant planning policies adopted or proposed by local authorities that experience particular pressure from student numbers. However, the review shows that there are few existing consistent policy options in use by other local authorities that could be adopted by Cambridge City Council.
- 1.30 The most common area in which there is mention of student housing is policy around Houses in Multiple Occupation (HMO). Most local authorities have concerns about the impact of greater volumes of HMO and, in particular, concerns about the concentration of HMO in certain areas. Most local authorities want to actively manage the location of new HMO using Article 4 Directions. There are tensions around whether to allow/accept geographic concentrations of students or whether students should be dispersed across the whole residential market.

Policy discussion

- 1.31 The research highlighted some key issues that should be considered in relation to determining a policy for student housing.

Student housing as a part of the wider housing market in the city

- 1.32 It is apparent that the number of students in the city is so large, and the universities in particular are so central to the city's economy, that **in future assessments of housing need, students should be treated more transparently as part of the overall housing need profile**. Land allocation needs to balance the competing demands of the different groups within the city's overall housing market.

The increasing diversity of student housing needs

- 1.33 The research shows that students are very diverse both within and across different institutions, as are their housing needs. There is an undergraduate population of students who reside in Cambridge during term time and who are likely to want some form of institutionally provided accommodation. However, there is a large postgraduate

population in Cambridge, some of whom will desire a more 'home-like' form of accommodation.

- 1.34 There is also a diverse student population using the non-university education institutions in the city. Many of these are accommodated in homestays, in existing accommodation facilities such as the University of Cambridge Colleges over the summer, and in some PBSA. It is clear that many of these students are only resident in the city outside of university term time (e.g. students at summer schools).

Student housing that meets the needs of the different institutions

- 1.35 Policy 46 of the emerging Local Plan includes the requirement for student accommodation to meet the identified needs of an existing educational institution providing housing for students on full-time courses of an academic year or more. It expands the existing policy position, which restricts accommodation to the University of Cambridge and Anglia Ruskin University, to include other institutions. However, the current policy situation has led to problems, primarily in tying the accommodation to particular institutions. This has occurred where new student accommodation is proposed and is in theory for students at Anglia Ruskin University, for example, but is not developed in discussion with Anglia Ruskin University, does not meet the affordability needs of these students, and is subsequently occupied by single people who may not be students or may be students of other institutions.
- 1.36 The research suggests that the policy position should be **to require the proposed accommodation to be tied to a specific educational institution, or a group of institutions, through either a long-term lease or long-term nomination agreement.** The system seems to work well where the details of the development are specified in partnership with an education institution, and is further strengthened where applications are made jointly.

The location of new PBSA

- 1.37 **The report estimates that some 6,000 rooms would have to be delivered in new PBSA if existing housing stock shared by students was to be returned to the open housing market.** There is an issue about the location of any new PBSA. There is a strong case for defining the areas in which new PBSA will be acceptable, rather than allowing speculative developments to become 'pepper potted' across the city. Having defined areas for housing students, within walking or cycling distance of teaching facilities, enables efficiencies in transport and service provision. This would enable greater control over issues such as car parking.

The role of HMO in the wider housing market in the city

- 1.38 This would not necessarily mean that permission for new HMO should then be refused, because so many other groups are reliant on HMO for affordable housing in the city. It should also be borne in mind that some students will always prefer to live in shared housing rather than PBSA. Any development of PBSA is also not guaranteed to release into the open market accommodation currently occupied by students,

because there is no guarantee that the properties would not be purchased by private landlords and continue to operate as HMO.

The policy challenge

1.39 The Council needs to make a decision **about the extent to which the current and future student population should be housed in PBSA, rather than in shared housing**, and therefore which windfall sites should be granted permission and which sites should be allocated in the future for student housing.

2 Main report: introduction

- 2.1 Cambridge City Council and Oxford City Council have commissioned this study to help inform planning policy with regard to the provision of student accommodation, and its impact upon housing need, within the two cities.
- 2.2 This report relates to Cambridge. It includes a baseline analysis of the current structure of the student population, its current accommodation, and the future plans of the different educational institutions. It analyses what the existing and future potential provision is in terms of student accommodation for different institutions. The report also reviews relevant planning policies adopted or proposed by other local authorities experiencing particular pressure from student numbers. The aim is to provide evidence to inform discussions about the need for, and supply of, student accommodation in relation to the emerging Local Plan.
- 2.3 Background information for the study is contained in the specification for the research, issued by Cambridge City Council and Oxford City Council in June 2016, and is detailed in the shaded text below.

Specification for Assessment of Student Housing Demand and Supply for Cambridge City Council and Oxford City Council. June 2016. Appendix B: Councils' Specification

The national planning policy background

The National Planning Policy Framework (NPPF) sets out the Government's planning policy approach to achieving sustainable development. Whilst no specific reference is made to student accommodation, key policy principles set out in the document are relevant to informing any Local Plan's policy approach. In particular, local planning authorities should 'plan for a mix of housing based on current and future demographic trends, market trends and the needs of different groups in the community' (paragraph 50).

The NPPF does not refer directly to the higher education sector, or to the provision of student accommodation. The Planning Practice Guidance (PPG), which was published in March 2014 immediately prior to the Council submitting its Local Plan to the Secretary of State for examination on 28 March 2014, refers to the possibility of including student accommodation towards the local housing requirement:

"All student accommodation, whether it consists of communal halls of residence or self-contained dwellings, and whether or not it is on campus, can be included towards the housing requirement, based on the amount of accommodation it releases in the housing market. Notwithstanding, local authorities should take steps to avoid double-counting."¹

¹ Reference ID: 3-038-20140306, Planning Practice Guidance

Notwithstanding this advice, Cambridge City Council does not currently count new student accommodation towards the Council's housing requirement as there is currently little evidential basis for the amount of accommodation released into the housing market, given the large number of higher and further education institutions in Cambridge. While initial versions of the PPG did not include any reference to provision for student accommodation in the methodology for assessing housing need, a revision to the PPG in March 2015 required that:

"Local planning authorities should plan for sufficient student accommodation whether it consists of communal halls of residence or self-contained dwellings, and whether or not it is on campus. Student housing provided by private landlords is often a lower-cost form of housing. Encouraging more dedicated student accommodation may provide low cost housing that takes pressure off the private rented sector and increases the overall housing stock. Plan makers are encouraged to consider options which would support both the needs of the student population as well as local residents before imposing caps or restrictions on students living outside of university-provided accommodation. Plan makers should engage with universities and other higher educational establishments to better understand their student accommodation requirements."²

This study is intended to support Cambridge City Council in addressing this element of the PPG.

The Cambridge policy context

The current Development Plan for Cambridge includes the following:

- Cambridge Local Plan (2006) and Proposals Map (2009);
- Cambridge East Area Action Plan (2008);
- North West Cambridge Area Action Plan (2009);
- Cambridgeshire and Peterborough Minerals and Waste Core Strategy, Minerals and Waste Site Specific Proposals Plan and Proposals Maps (2011/2012).

The current Cambridge Local Plan 2006 confirms that it is important that the Local Plan makes adequate provision for College and University of Cambridge residential needs. Paragraphs 7.47 and 7.48 of the existing Local Plan also recognise that Anglia Ruskin University has limited student accommodation, creating a significant demand for private rented housing. The existing Local Plan supports Anglia Ruskin University's desire to house as many of its students as possible in purpose-built accommodation. The Proposals Schedule and Proposals Map allocate a number of sites for student accommodation for both universities. Provision for student accommodation has since been made on a number of these sites, including the Brunswick site (Site 7.11), the Sedley School site (Site 7.13), and the Station Area (Site 9.10). The existing Local Plan addresses student accommodation development for the University of Cambridge and Anglia Ruskin University specifically in Policies 7/7 and 7/9 and speculative student accommodation through Policy 7/10. Policy 7/10 also requires the accommodation to be for one or both of

² Reference ID: 2a-021-20160401, Planning Practice Guidance

the universities and is usually secured via a cascade mechanism in the Section 106 legal agreement for the relevant site.

In relation to the provision of student accommodation, Cambridge has seen significant provision of new student accommodation since 1 April 2011. 747 student units were completed in the 2015/16 monitoring year. At 1 April 2016, there were a further 331 student units with planning permission but not yet built and 950 student units under construction. Developments under construction at 1 April 2016 included: 1-8 St Clements Gardens, 1 Milton Road, units at North West Cambridge and Castle Court in Castle Park. Between 1 April 2011 and 31 March 2016, 2,511 student units were completed.

The Cambridge East Area Action Plan (adopted 2008) is supportive of student accommodation, but does not make any specific allocations for student accommodation. No applications for student accommodation have come forward within the Cambridge East area.

The North West Cambridge Area Action Plan (adopted 2009) has enabled the University of Cambridge to promote the development of its North West Cambridge site through an agreed policy framework (Policy NW5: Housing Supply). This site is subject to outline planning permission (11/1114/OUT) granted in February 2013, which includes 2,000 new student units for the University of Cambridge, 325 of which have reserved matters approval (13/1400/REM). Construction commenced on the delivery of 325 units in early 2015.

Cambridge City Council commenced the process of reviewing the Local Plan in 2011. After two issues and options stages of consultation, the Cambridge Local Plan 2014: Proposed Submission was consulted upon from 19 July to 30 September 2013 and submitted to the Secretary of State on 28 March 2014. The Cambridge Local Plan 2014: Proposed Submission was submitted for examination on 28 March 2014 at the same time as South Cambridgeshire District Council submitted their Local Plan. Having held hearing sessions on issues relating to overall housing need, the development strategy, Green Belt, transport and housing delivery, the Inspectors wrote to advise the Councils of issues to be addressed (Inspectors' letter of 20 May 2015). The Councils produced a number of further evidence base documents and consulted on Proposed Modifications to both Local Plans. The hearing sessions recommenced in June 2016. The policy relating to the provision of student accommodation (Policy 46) has not yet been the subject of examination hearings.

The NPPF (paragraph 216) sets out the weight which can be given by decision-takers to relevant policies in emerging plans. Whilst the emerging Local Plan has weight in decision-making as it has been submitted for examination, there remain unresolved objections to the relevant policies and allocations in the plan.

The Population, Housing and Employment Forecasts Technical Report which informs part of the evidence base for the Strategic Housing Market Assessment and the emerging Local Plan assumes that the population in communal establishments in the city will grow in line with the household population. The proportion of students living in communal establishments is roughly two thirds.

The population for Cambridge in 2011 was roughly 123,000, of which 16,000 were in communal establishments, of which 14,000 were students. The indicative population for 2031 for Cambridge is 150,000, of which 20,000 are in communal establishments, of which 17,500 are students. This means that of the population increase of 27,000 for Cambridge, 4,000 of that is for people living in communal establishments, of which 3,500 are students.

Policy 46: Development of student housing requires student accommodation to meet the identified needs of an existing educational institution providing housing for students on full-time courses of an academic year or more. This represents a step change from the existing policy position which restricts accommodation to the University of Cambridge and Anglia Ruskin University.

In developing the emerging policy, the Council considered the impact of maintaining the approach of the three existing policies within the Cambridge Local Plan 2006 relating to the delivery of student accommodation, which are either institution specific or relate to speculative student accommodation. In terms of restricting access to student accommodation only to the two universities in the emerging Local Plan, it was considered that this may be perceived to conflict with the NPPF's approach which requires local authorities to support the knowledge industries and the development of a strong and competitive economy. Additionally, when the Council considered whether to carry forward the existing policy approach in Cambridge and continue to restrict occupation of student accommodation to the two universities, officers identified a similar approach in Oxford's Core Strategy (Policy CS25), which was overruled by the Inspector at the Examination in Public into Oxford's Core Strategy on 21 December 2010. In the case of Oxford, the Inspector removed the embargo restricting occupation of student accommodation to students attending the two universities in Oxford on the basis that it was inequitable and was discriminating against non-university colleges.

Since the emerging Local Plan was submitted for examination, a number of issues have been raised locally in respect of planning applications coming forward for student accommodation development in Cambridge. Concerns have been raised through committees, petitions, response to planning applications and the local press about the amount of student accommodation coming forward in Cambridge for different institutions. Particular reference should be made to a recent appeal decision for 315-349 Mill Road, where an appeal was allowed for student accommodation on a housing allocation (App/Q0505/W/15/3035861). Paragraphs 14 and 15 of this appeal decision address the issue of Anglia Ruskin University's (ARU) student accommodation need:

Whilst it may well be possible to meet the intention of supplying dedicated rooms to all ARU first year students who require them, this appears to be a minimum objective: the Local Plan notes that the University wishes to house as many students as possible in purpose built accommodation, and more recent correspondence from ARU indicates that it is generally not possible to accommodate later years in University sponsored rooms. Similarly, data provided by the appellants indicates that ARU lies above national averages

in both the proportion of students in private rented accommodation, and those travelling from remote locations.

It is recognised that this is a fluid situation, and that there is likely to be a continuing strong supply of new student housing in the City, prompted by the financial attractiveness of this form of development. However, in part this attractiveness arises out of the level of unsatisfied demand for such accommodation. At this stage, the evidence falls short of proving that there does not remain a need for purpose built student housing, especially to improve the choice and opportunities for ARU students.

Additionally, recent planning applications have included a high number of studio units, rather than cluster flats (where students have individual bedrooms and bathrooms, but share kitchen and living room space). Anglia Ruskin University, in particular, has stated that studio flats are not as suitable for its students as cluster flats, given the higher prices charged for such accommodation and the layout of units not allowing for social interaction. The current Cambridge Local Plan 2006 does not effectively cover the issue of studio flats as the use of studio accommodation was not a common approach to the provision of student accommodation when the Local Plan was drafted. The issue cannot be addressed effectively by the Cambridge Local Plan 2006 and the NPPF and PPG do not assist significantly in this respect.

It has also been suggested that student accommodation schemes should only be allowed if they deliver affordable housing provision within the site. The Council consulted on an option (Option 95) at the Issues and Options stage of plan-making on requiring affordable housing from student development. On the basis of the results generated from analysis, the Council's viability consultants advised the Council in 2013 that the average surplus is too low to confidently recommend that the Council include a policy for the collection of financial contributions towards affordable housing from student accommodation at this stage.

A key outcome of this study will be a greater level of information on the current housing provision for students and the need for different forms of accommodation, now and in the future. Although Cambridge City Council has seen student accommodation applications in recent years on both allocated sites and through windfall development, the Council needs to understand whether it is making adequate provision for students over the plan period; and whether there is a need for further allocations to meet this need. This study will form part of the evidence base for decision making around student housing provision.

Structure of the report

- 2.4 Section 3 outlines the methodology for the research. It explains the challenges of reconciling data in student numbers from different sources and outlines the different sources of data used in this report.
- 2.5 Section 4 begins with an overview of the student population in Cambridge and the type of accommodation in which students are housed. This is based on self-reported data about where students live, extracted from the HESA data. This section of the report

then details the findings from the online survey using data provided by the different institutions. It analyses the types of accommodation currently provided by the different education institutions and how this may change in the future.

- 2.6 It explores contextual data to help understand the city's profile of student housing; for example, the numbers of students who commute into the city, already have a family home in the city, have partners, have children, and other factors that will shape housing need. It explores how much PBSA the institutions have currently, and other ways in which they house students (e.g. through leasing ordinary housing stock or arranging homestays).
- 2.7 Section 5 analyses the current and future potential for PBSA in the city. It draws mainly on the HESA data for the two universities, with contextual information drawn from the online surveys in Section 3.
- 2.8 Section 5 provides estimates of the current and future potential for PBSA in the city to accommodate students who are not housed by their educational institution or living in the parental home. This would involve accommodating in PBSA all of the students who selected 'Own permanent residence owned or rented by you' and 'Other rented accommodation (shared with others on a temporary basis)' as their current accommodation.
- 2.9 It analyses the extent to which these students are currently accommodated in existing 'street' housing stock used as shared housing for students, and the extent to which this might be released into the open housing market if more PBSA were available. This section then looks at Anglia Ruskin University and the University of Cambridge separately. In particular, it analyses the different student age profiles at the universities and the implications this might have for how students are accommodated and the impact on the level of PBSA.
- 2.10 This section also provides an estimate for the effect of planned growth in the university sector to 2026: this is primarily potential growth in postgraduate numbers at the University of Cambridge, a smaller potential growth in the University of Cambridge undergraduate numbers, and an overall static position for Anglia Ruskin University.
- 2.11 Section 6 discusses the findings from a review of planning policies relating to student housing in other local authorities.
- 2.12 Section 7 discusses the key policy issues relating to student housing that need to be considered.

3 Methodology

- 3.1 This section describes the ways in which data were collected for the research. It explains some of the key uncertainties relating to the data sets and the main assumptions used within the data analysis.

Inception meeting

- 3.2 The project began with an inception meeting to discuss the research, methodology and outputs.

Identification of institutions and key contacts

- 3.3 A comprehensive list of the relevant institutions to be included in the study was developed. Phone calls were made to the institutions to identify the best person to contact to complete the survey and to gather their contact details. The contact list has been updated throughout the research and has been supplied to the Council.
- 3.4 The University of Cambridge Colleges and wider University of Cambridge were included in the study, as was Anglia Ruskin University. The non-university institutions excluded the standard school sector but included the FE colleges (e.g. Cambridge Regional College), language schools (e.g. Bell Educational Services Ltd), performing arts colleges (e.g. Cambridge School of Visual and Performing Arts), theological colleges (e.g. Wesley House), independent sixth forms (e.g. Mander Portman Woodward) and summer schools (e.g. Reach Cambridge). A summary of the institutions contacted is included in Appendix 1.

Online survey

- 3.5 An online survey was developed to collect data from individual institutions in relation to the brief, including data about their student profile, current accommodation provision, and future planned provision. Respondents were asked to provide a contact telephone number for a follow-up interview as necessary. People were given the option to talk through the survey questions if they preferred not to complete it online.
- 3.6 Qualtrics software was used to design and distribute the web-based survey. This allowed a wide range of question types and filtering options (e.g. to direct respondents to certain questions based on answers to previous questions). It also enabled monitoring of responses directly in real time and the ability to chase non-responders whenever required.
- 3.7 The survey content was agreed with the nominated Council officers, piloted and discussed with representatives from the educational institutions. Copies of the surveys can be found in Appendix 2.
- 3.8 A survey was distributed to all of the non-university educational institutions in Cambridge. It collected data about the current numbers, and types, of students requiring accommodation, and the plans of institutions for future development or expansion. A shorter survey was distributed to Anglia Ruskin University and to all of

the University of Cambridge Colleges, with support from the University's Office of Intercollegiate Services. The survey was shorter because some of the data were extracted from the University HESA data (see next section). The online survey collected data about students requiring accommodation and the plans for future development or expansion. It was not possible to collect data on cycle and car parking and amenity space.

Secondary data analysis

- 3.9 Analysis of secondary data was conducted to collect as much data as is already available on student housing and student numbers. The key source of data is the Higher Education Statistics Agency (HESA), which collects data on a very wide range of relevant topics, including student numbers, types of courses, student accommodation in purpose-built or institution-owned accommodation, and academic floorspace. This only supplies data for the universities – in this case, the University of Cambridge and Anglia Ruskin University. Both institutions supplied data based on their HESA returns.

Policy review of other local planning authorities

- 3.10 A list of local authorities to review was agreed with the Council. The review explored how other authorities have dealt with the accommodation needs of students and different institutions, including data on any policy restrictions on particular institutions and accommodation types, where available. The aim was to identify any relevant policy in other local authority areas that could inform policy development in Cambridge in relation to student housing.

Interim project review

- 3.11 An interim project report was submitted, followed by discussion with the Council's nominated project officers.

Follow-up interviews

- 3.12 Interviews were conducted with a sample of institutions. These built on the survey data to further explore their plans for growth, student accommodation provision, how and where the different institutions in Cambridge house their students, and whether existing provision is adequate.

Data analysis

- 3.13 The secondary data, survey data and interview data were analysed to address the aims and objectives and the findings are detailed in this report. Data have been provided in a format that can allow the Council to update the information in future years. A clear record was kept of the institutions identified, the key contacts, and the questions asked, so that the Councils can update the work if necessary.
- 3.14 There are a number of issues to note in relation to the data analysis. A key issue is the differences between data sources on student numbers and the difficulty in matching

data between sources. A second issue is the uncertainty around certain information, such as future growth plans.

Definitions of student numbers

- 3.15 One issue that needs highlighting is why student numbers can appear to vary, quite legitimately, depending on which source or definition is used. Counting students, even for institutions, is quite difficult.
- 3.16 The student numbers in the baseline analysis in this report are based upon the returns made by the two universities to HESA. Each of the universities has completed a standard template, extracting data from their 2015/16 HESA return, and these data have been used in producing the tables in this report. For the purposes of this research, part-time students are excluded from the analysis of the HESA data based on the assumption that they are already housed for the duration of their part-time studies.
- 3.17 The University of Cambridge Colleges and Anglia Ruskin University also supplied additional information through the online survey. The data for the non-university institutions was collected through the online survey. There are discrepancies between the data provided through the online survey and extracted from the HESA returns. This relates in part to which students are included in the data.
- 3.18 The HESA data is a 'flow', recording all students over the course of the academic year (August to August), but the universities may also publish 'snapshot' data at a fixed point during the year (the University of Cambridge publishes snapshot data as at 1 December), and the two datasets will not match.
- 3.19 HESA data records 'student instances', so that a student completing an MPhil and starting a PhD in the same year will count as two 'student instances'. The data in this report have been edited to provide a headcount; the overall numbers will therefore be different from HESA tables.
- 3.20 Student numbers are affected at a point in time by the number of incoming visiting and exchange students and the number of outgoing visiting and exchange students. Some students are classified as 'dormant'. These are generally students who are taking a leave of absence from their course, very often for health-related reasons. Students 'not in attendance at institution' will include, for example, modern languages students abroad as part of their course, and postgraduates away on fieldwork.
- 3.21 Part-time students who are expected to spend less than eight consecutive course weeks in the UK during their entire programme and who are not UK-domiciled are included in the Aggregate Offshore record and excluded from the HESA Student record, and therefore not included in any of the tables. For the University of Cambridge, there are 474 non-UK-resident, part-time students on courses that are attended in Cambridge for less than eight consecutive weeks at a time.

- 3.22 In the University of Cambridge, there are students on credit-bearing courses who are members of the University but who are not required to matriculate nor be admitted as a member of a Cambridge College. These students are included in the University totals, but will not appear under College totals, even if the students are hosted by Colleges during their periods in Cambridge.
- 3.23 A significant number of the University of Cambridge postgraduate students (2,688) are recorded as 'writing up' (usually completing their thesis). However, this is a status that can potentially last for some years, and the whereabouts of these students is not necessarily recorded. Many may no longer be in Cambridge.

Definitions of student accommodation

3.24 Student accommodation is classified in the HESA returns under a number of headings:

- College/University maintained property.
- Parental/guardian home.
- Other (not listed).
- Not known.
- Own permanent residence either owned or rented by you.
- Other rented accommodation (shared with others on a temporary basis).
- Private sector halls (not College/University maintained).

3.25 Data on student accommodation is self-reported by students to their university, and there may be important inaccuracies in the data reported.

3.26 For example, students may report that they live in 'Own permanent residence owned or rented by you', when they are in fact living in a house or flat shared with other students, and should have reported their accommodation as 'Other rented accommodation (shared with others on a temporary basis)'.

3.27 As a result of the discrepancies between data sets and numerous ambiguities within the data, the data analysis has a degree of unavoidable uncertainty. Data were triangulated using different sources (e.g. HESA data, data from the online surveys and data from interviews). The estimates are as robust as possible based on the available data.

Assumptions about shared houses

3.28 The data analysis made assumptions about the average number of students in a shared property. According to Cambridgeshire County Council's research team, one dwelling provides accommodation for 3.5 students, on average. However, the data collected from the Cambridge Colleges showed that shared houses that are rented for use by students in the open market house an average of 5 students per property. The

data analysis therefore estimates the number of shared houses based on the average of both 3.5 and 5 students per property, and provides a range.

Assumptions about future growth

3.29 The analysis of the future potential level of PBSA has a projection for 10 years to 2026. Although the plan period runs to 2031, there is a considerable lack of certainty about potential future growth in the two universities, which means that 10 years is the maximum projection that can be made using realistic data. The university sector is facing many uncertainties (for example, the impact of Brexit), which makes predicting growth in student numbers difficult. Neither university has growth projections that go beyond 10 years.

4 Baseline analysis

- 4.1 This section begins with an overview of the student population in Cambridge and the type of accommodation in which students are currently (2015/16) housed. This is based primarily on self-reported data about where students live, extracted from the HESA data.
- 4.2 This section then details the findings from the online surveys conducted specifically for this research. It analyses the types of accommodation currently provided by the different education institutions and how this may change in the future.
- 4.3 It explores any contextual data available to help understand the city's profile of student housing – for example, the numbers of students who commute into the city, already have a family home in the city, have partners, have children, and other factors that will shape housing need. It explores how much PBSA the institutions have currently, and other ways in which they house students (e.g. through leasing ordinary housing stock or arranging homestays). This contextual information helps to inform the analysis of current and future housing need in the following section of the report.

Full-time and part-time students

- 4.4 A quarter of all the students in Cambridge, 12,714 out of a total of 49,426, are studying on part-time courses, defined as ones that last for less than an academic year (Table 1).
- 4.5 These cover a very wide range of courses, from apprentices on day release at Cambridge Regional College to managers studying for an Executive MBA and in Cambridge for a number of long weekends spread over a two-year period.
- 4.6 In nearly all cases, part-time students will be living in either their parental home or their own home, in homestay accommodation, or accommodated in existing PBSA during the vacation periods.
- 4.7 This report assumes that part-time students do not therefore create any demand for accommodation in excess of that provided for full-time students. Part-time students at the two universities are therefore not included in any of the figures later in this report. Part-time students at the other educational institutions are included in Table 2, and discussed later in this Section, because their accommodation is more diverse than that of the university student population.

All full-time and part-time students				
	Full-time		Part time	
	Undergraduate	Postgraduate	Undergraduate	Postgraduate
University of Cambridge	11,815	9,412	310	1,549
Anglia Ruskin University	8,153	1,332	574	861
Subtotal	19,968	10,744	884	2,410
Other educational institutions	6,000		9,420	
Total	36,712		12,714	
Overall total	49,426			

Table 1: All full-time and part-time students

Baseline 2015/16: current student numbers and accommodation

- 4.8 The table overleaf (Table 2) summarises the data for each of the two universities (based on HESA returns), the total position for the two universities together, the data for the non-university educational institutions (based on the survey conducted for this research), and overall totals for the student population in Cambridge.
- 4.9 The table classifies the seven types of accommodation used for HESA returns, plus a category for 'homestay' students, into four broad groups:
- PBSA, which includes University/College maintained accommodation and private halls.
 - Shared existing housing, which includes both 'Own permanent residence either owned or rented by you' and 'Other rented accommodation (shared with others on a temporary basis)'.
 - Existing family housing, which includes the parental home and 'homestay'.
 - No information, which includes the 'other' and 'not known' categories in the HESA data.

Baseline: 2015/16 student accommodation: numbers of students										
		Purpose Built Student Accommodation		Shared existing housing		Existing family housing		No information		Total
		University/College maintained	Private halls	Other rented	Own home	Parental/guardian home	Homestay	Other	Not known	
University of Cambridge	Undergraduate	10745	44	503	226	22		13	262	11815
	Postgraduate (1 year)	2240	59	212	220	68		26	277	3102
	Postgraduate (2+ years)	2890	241	1278	1293	78		105	425	6310
	Subtotal	15875	344	1993	1739	168		144	964	21227
Anglia Ruskin University	Undergraduate	901	435	2090	2195	2091		347	94	8153
	Postgraduate (1 year)	156	50	295	219	131		41	28	920
	Postgraduate (2+ years)	45	18	132	139	45		27	6	412
	Subtotal	1102	503	2517	2553	2267		415	128	9485
Total Universities	Undergraduate	11646	479	2593	2421	2113		360	356	19968
	Postgraduate (1 year)	2396	109	507	439	199		67	305	4022
	Postgraduate (2+ years)	2935	259	1410	1432	123		132	431	6722
	Total Universities	16977	847	4510	4292	2435		559	1092	30712
Non-university institutions		750	3836	355	0	5304	4390	0	785	15420
	Total all institutions	17727	4683	4865	4292	7739	4390	559	1877	46132

Table 2: Number of students and accommodation in Cambridge 2015/16

4.10 The table below (Table 3) shows a summary of the overall student numbers by the four broad categories of accommodation type.

Baseline: 2015/16 student accommodation: numbers of students by broad category of accommodation					
	Purpose Built Student Accommodation	Shared existing housing	Existing family housing	No information	Total
University undergraduate	12125	5014	2113	716	19968
Postgraduate (1 year)	2505	946	199	372	4022
Postgraduate (2+ years)	3194	2842	123	372	6531
Total university	17824	8802	2435	1651	30712
Non-university institutions	4586	355	9694	785	15420
Total all institutions	22410	9157	12129	2436	46132

Table 3: Number of students by accommodation type in Cambridge 2015/16

4.11 Key points:

- a. 91% of undergraduates and 55% of postgraduates at the University of Cambridge are in University or College maintained accommodation (Figures 1 and 2, overleaf), compared to 11% of undergraduates and 15% of postgraduates at Anglia Ruskin University, (Figures 3 and 4, on page 30).
- b. Anglia Ruskin University is therefore currently dependent upon housing 4,285 undergraduates and 785 postgraduates in shared housing, a total of 5,070 students, occupying between 1,000 and 1,450 shared houses, depending upon the average number of students to each shared house.
- c. The position is reversed for the University of Cambridge, where only 729 undergraduates are housed in shared existing housing, but 3,003 postgraduates are accommodated in shared existing housing, occupying between 600 and 875 shared houses, again depending upon the average number of students to each shared house.
- d. The non-university institutions have very little directly owned accommodation (750 bed spaces among 15,420 students), but make extensive use of private halls (3,836 bed spaces, or 82% of all student accommodation in private halls).
- e. The non-university institutions also house 4,390 students in 'homestay' accommodation, and a further 5,304 are living in the parental home (mainly Cambridge Regional College students).
- f. The non-university institutions also make relatively little use of shared housing, with only 355 students accommodated in shared housing, or only 2% of the total number of non-university institution students.
- g. 833 postgraduates at the University of Cambridge, or 9% of the total of 9,412, are either 'other' or 'not known'. 313 of these are 'writing up'. There are a further 275 University of Cambridge undergraduates who are 'other' or 'not known'. From anecdotal evidence it appears likely that many of those who are 'other' or 'not known' are in fact living elsewhere, mainly in London.

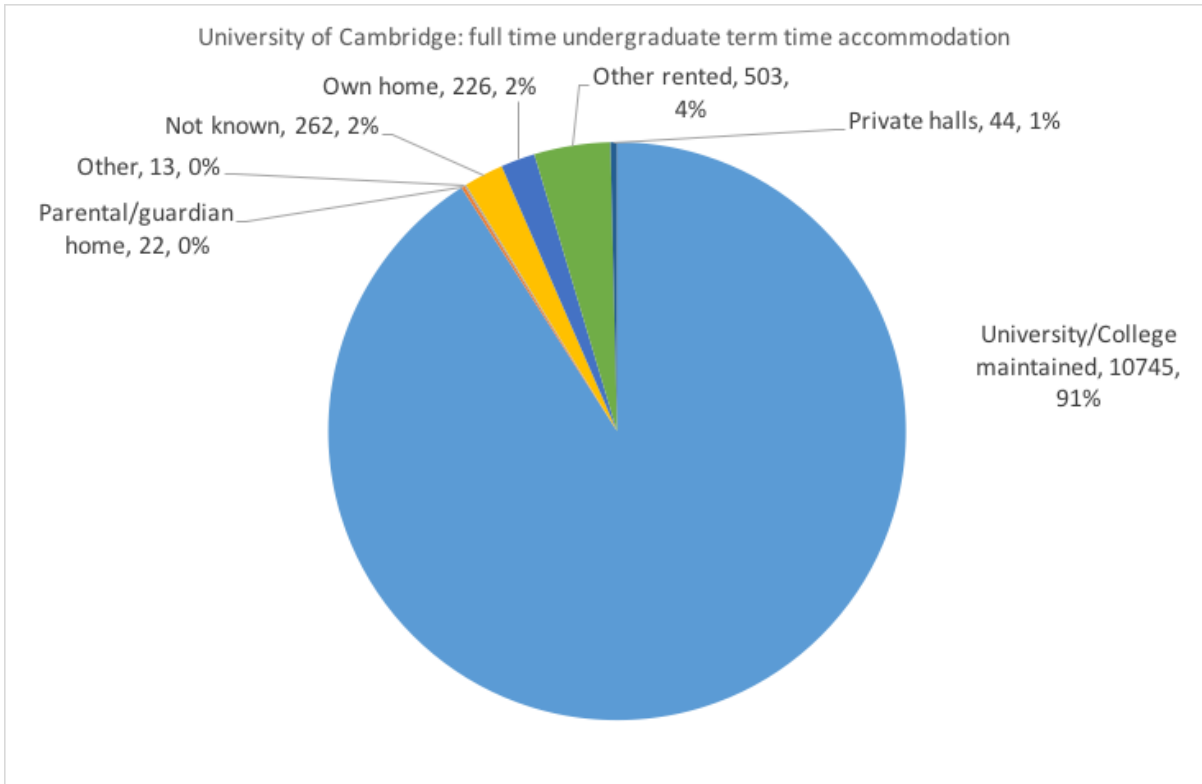


Figure 1: University of Cambridge full-time undergraduate term-time accommodation

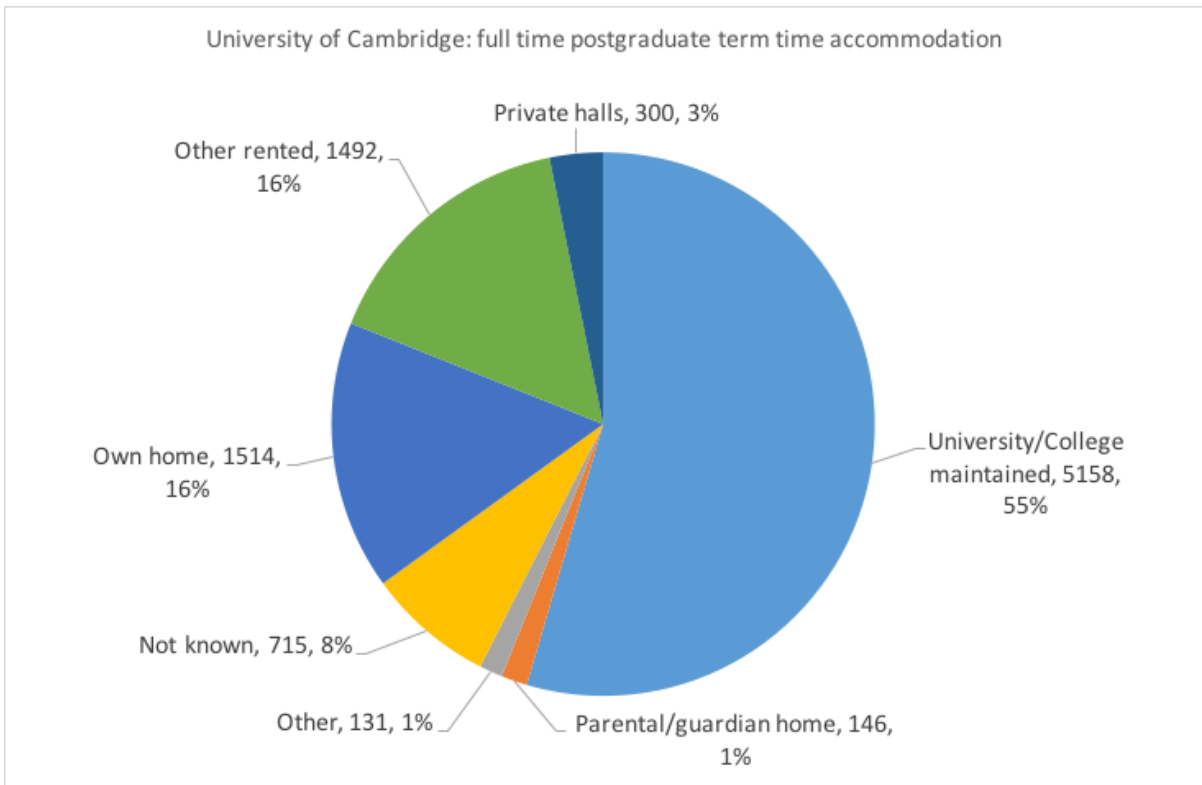


Figure 2: University of Cambridge full-time postgraduate term-time accommodation

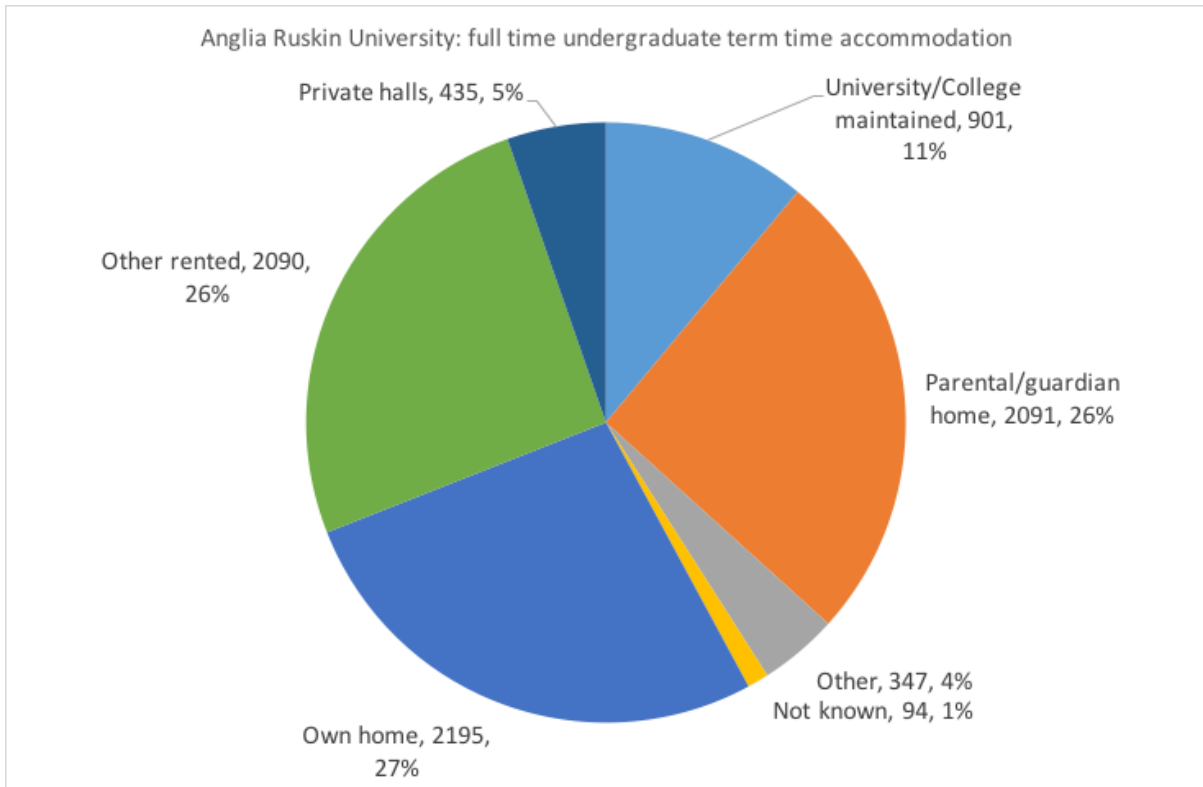


Figure 3: Anglia Ruskin University full-time undergraduate term-time accommodation

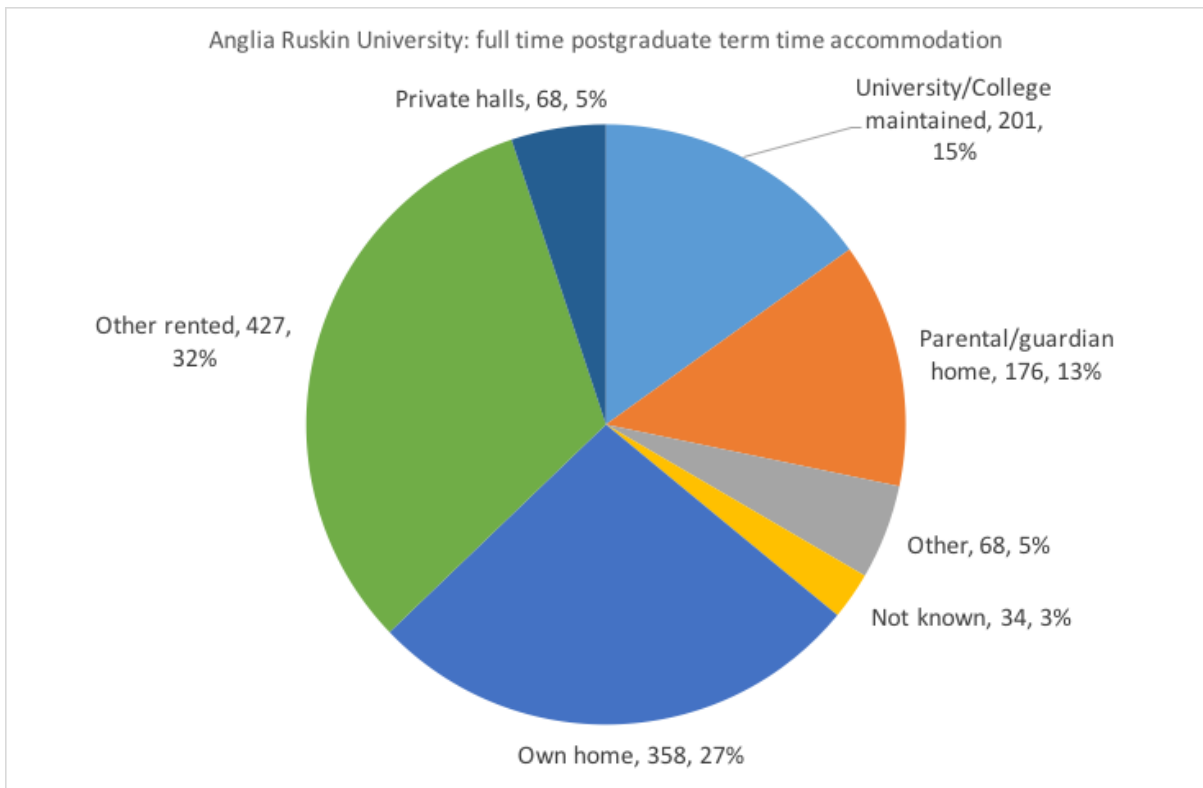


Figure 4: Anglia Ruskin University full-time postgraduate term-time accommodation

4.12 Figure 5 (below) shows that the number and proportion of undergraduates who are not housed in University/College maintained accommodation varies considerably between the Colleges. For example, more than 25% of undergraduates are not housed in University/College maintained accommodation at Homerton, St Edmund's, Girton, Queens', Jesus, and Gonville and Caius Colleges.

4.13 New developments can significantly change these proportions. For example, in the data sources used for this report, Churchill College had more than 30% of undergraduates not housed in University/College maintained accommodation. However, later in 2015/16, Churchill College opened one new block of PBSA which accommodates 69 students and the College can now accommodate all undergraduates in College accommodation.

4.14 Figure 6 (overleaf) shows that the number and proportion of postgraduates not housed in University/College maintained accommodation also varies. For example, more than 30% of postgraduates are not housed in University/College maintained accommodation at Homerton, Hughes Hall, Darwin, St Edmund's, Queens', and Wolfson Colleges.

4.15 Of the students who are not housed in University/College maintained accommodation, the number of postgraduates is higher than the number of undergraduates. Fewer than 70 undergraduates are not housed in University/College maintained accommodation at each College. More than 150 postgraduates are not housed in University/College maintained accommodation at the Colleges listed above.

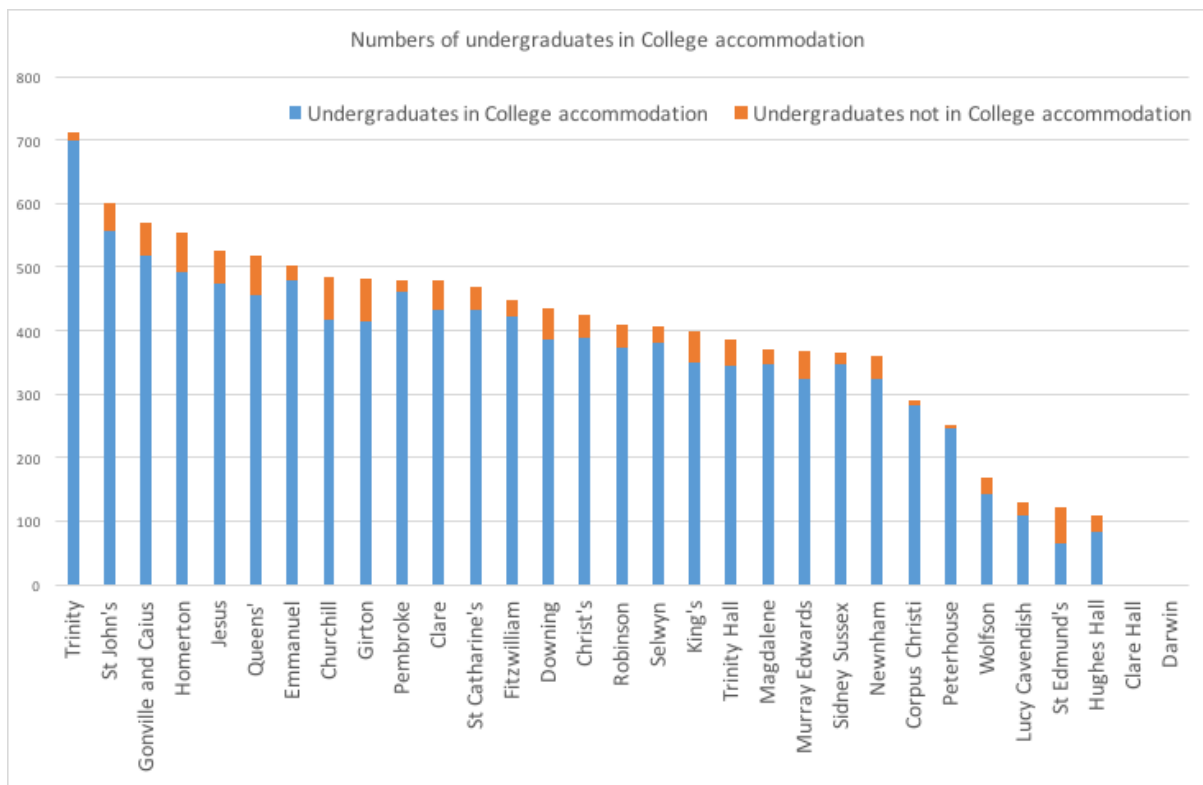


Figure 5: University of Cambridge number of undergraduates not housed in University/College maintained accommodation

Note: Clare Hall and Darwin do not have undergraduate students

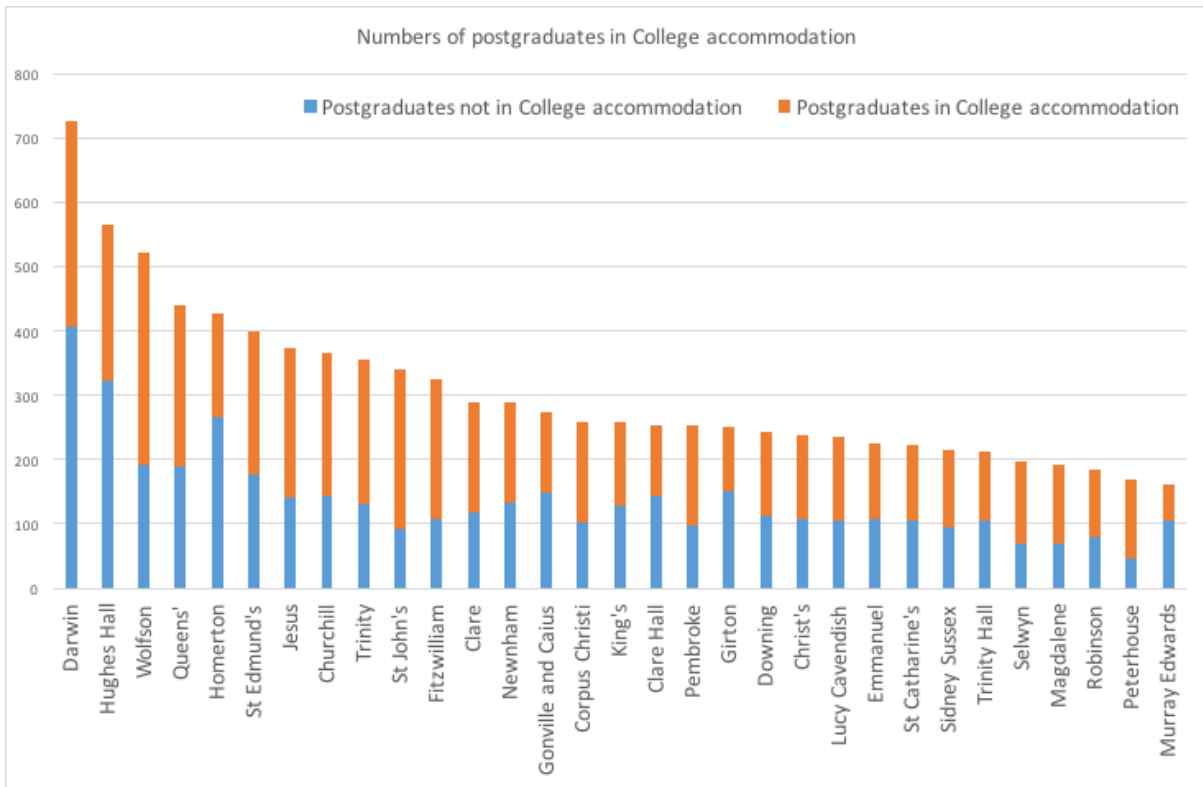


Figure 6: University of Cambridge number of postgraduates not housed in University/College maintained accommodation

University of Cambridge

Overview

- 4.16 The University of Cambridge was founded in 1209 and consists of 31 independent, self-governing colleges. It is a world-renowned centre of academic excellence. With nearly 9,000 staff, it is one of the largest employers in Cambridge and makes a significant contribution to the local economy. The majority of its buildings are in the historic city centre of Cambridge and to the west and north-west of the city.
- 4.17 The University of Cambridge has maintained a steady growth rate, particularly in postgraduate students. The majority of University of Cambridge students live in University- or College-owned accommodation, concentrated predominantly in the city centre and to the west of the city centre.
- 4.18 Data were collected from the University of Cambridge Colleges in several ways. A representative from the Office of Intercollegiate Services provided data collected through previous internal surveys. Informal discussions were held with individual Colleges. An online survey was distributed to all University of Cambridge Colleges (completed by 28 Colleges). The research team offered to complete the survey with the Colleges. Three Colleges did not complete the survey – Trinity, Trinity Hall and Robinson.³ Overall, this gives a response rate of 90%.
- 4.19 Whilst 25 of the Colleges in the University of Cambridge accept students on both undergraduate and postgraduate courses at any age, six Colleges only accept postgraduate students or mature students (aged 21 or over at the start of their course). Clare Hall and Darwin only accept postgraduate students and Hughes Hall, Lucy Cavendish, St. Edmund's and Wolfson only accept mature students (across undergraduate and postgraduate courses).

Student numbers

- 4.20 Not all students of the University of Cambridge will require accommodation in the city for their courses. Thirteen Colleges are aware that some of their students were already residents of the city. Between the eight Colleges that could estimate the number of such students, it was suggested that at least 99 students already lived in Cambridge. Furthermore, 18 Colleges were aware that some of their students lived outside the city and commuted into Cambridge for their classes. Between the 12 that could estimate the number of students this applied to, it was suggested that at least 145 students commute into Cambridge. Overall, this would suggest that at least 244 students at the University of Cambridge do not require accommodation for their courses.

Accommodating students

- 4.21 All Colleges have PBSA that they own. Across the 28 Colleges that responded to the online survey, 14,045 students are accommodated in College-owned PBSA. The

³ Robinson College contacted the research team to explain that it would not be possible for them to complete the survey due to staffing pressures (linked to long-term sickness leave).

remaining 1,830 units in Table 1 are likely to be owned by the Colleges that did not reply to the online survey.⁴

4.22 Six Colleges (Christ's, Darwin, Hughes Hall, Murray Edwards, St. Catharine's and St. Edmund's) short-term lease student accommodation, which houses 233 students.

4.23 The same six Colleges also lease ordinary housing stock from private owners to use as student accommodation. Between them, the Colleges lease 44 properties, which house 236 students (an average of 5 students per house). The use of ordinary housing stock for student accommodation via Colleges is summarised below (Table 4).

College	Number of properties leased	Number of students accommodated
Christ's	20	100 (5 per house)
Darwin	1	1 (1 per house)
Hughes Hall	9	48 (5.3 per house)
Murray Edwards	7	38 (5.4 per house)
St. Catharine's	3	21 (7 per house)
St. Edmund's	4	28 (7 per house)

Table 4: The number of properties from ordinary housing stock leased by each College, and how many students are accommodated

4.24 None of the Colleges have any formal or informal nomination agreements with landlords to house students.

4.25 Across the different forms of College-provided accommodation, postgraduate and undergraduate students are accommodated in the ways shown below (Table 5).

	Self-contained studio flats	En suite bedrooms	Bedrooms with shared facilities	Total
Postgraduate taught or research courses	418 (6%)	4,044 (56%)	2,718 (38%)	7,180 (100%)
Undergraduate degree courses	10 (0%)	3,745 (38%)	5,995 (61%)	9,750 (100%)
Units not separated by degree type (Wolfson College)	27 (7%)	299 (73%)	83 (20%)	409 (100%)
Total	455 (3%)	8,088 (47%)	8,796 (51%)	17,339 (100%)

Table 5: The number, and type, of accommodation units provided by the Colleges

4.26 The table demonstrates that postgraduate students are more likely than undergraduates to be accommodated in self-contained flats and less likely to be accommodated in bedrooms with shared facilities. This would suggest that Colleges view the accommodation needs of postgraduate students differently from those of

⁴ The number of students at the Colleges that did not respond to the online survey are: Trinity 1,097; Trinity Hall 609; and Robinson 606. These are full-time student numbers by College or associated organisation, by term-time accommodation, 2015/16 HESA Student data (headcount).

undergraduates. Further, the Colleges are aware that some of their students have partners or families and may therefore have different housing requirements.

- 4.27 Twenty-five Colleges were aware that some of their students were either married or in long-term relationships; eight Colleges could estimate the numbers of such students, suggesting that this totalled at least 934 students. In addition, 25 Colleges were aware that some of their students had children; 21 Colleges estimated the numbers of students with children to be 462.

Future plans

- 4.28 All Colleges were asked about their planned rate of expansion, by course type, over the next five to ten years (Table 6). These do not necessarily mirror the University of Cambridge's planned growth rates of 0.5% for undergraduates and 2% for postgraduates, reflecting the autonomous nature of the Colleges.

College	Intended rate of expansion as a percentage	
	Postgraduate taught or research	Undergraduate degree
Christ's	-	0
Churchill	2	0
Clare	2	0
Clare Hall	0	N/A
Corpus Christi	2	0
Darwin	1	N/A
Downing	2	0
Emmanuel	0	0
Fitzwilliam	0	0
Girton	7	0
Gonville and Caius	2	0
Homerton	0	3
Hughes Hall	2	0
Jesus	-	-
King's	0	0
Lucy Cavendish	10	0
Magdalene	-	-
Murray Edwards	20	0
Newnham	2	-
Pembroke	2	0
Peterhouse	2	0
Queens'	1	0
Selwyn	2	0
Sidney Sussex	2	0
St. Catharine's	1	-
St. Edmund's	2	0
St. John's	2	0.5
Wolfson	"slight"	"slight"

Table 6: Planned rate of expansion, by course type

- 4.29 Whilst almost all Colleges are not intending to increase undergraduate student numbers, Homerton College is planning on a 3% increase in five to ten years' time.
- 4.30 Whilst most Colleges are planning on an increase of up to 2% in postgraduate student numbers, three Colleges are intending on greater increases than this. Girton College plans to expand its postgraduate population by 7%, Lucy Cavendish College by 10%, and Murray Edwards College by 20% over the next five to ten years.
- 4.31 All Colleges were asked whether their plans over the next five to ten years have been influenced by the outcome of the referendum on EU membership. No Colleges saw Brexit as an opportunity for expansion; two Colleges (Jesus and Sidney Sussex) have put plans on hold; and 25 Colleges are continuing with their plans.
- 4.32 The Colleges were asked about their thoughts on any changing demand in types of student accommodation (self-contained studio flats, en suite bedrooms and bedrooms with shared facilities). Sixteen Colleges predicted an increasing demand for self-

contained studio flats over the next five to ten years, and eight Colleges thought demand would remain the same.

- 4.33 Nineteen Colleges thought that demand for en suite bedrooms would increase and seven thought it would remain the same over the next five to ten years.
- 4.34 Only four Colleges thought that demand for bedrooms with shared facilities would increase over the next five to ten years (King's, Lucy Cavendish, St. Catharine's and St. John's). Thirteen Colleges thought demand for bedrooms with shared facilities would remain the same and eight Colleges predicted a decline in demand over the next five to ten years (Churchill, Corpus Christi, Emmanuel, Gonville and Caius, Pembroke, Queens', Selwyn and Wolfson).
- 4.35 Colleges were also asked to outline how they planned to provide housing for their students in five to ten years' time. However, not all Colleges responded with appropriate data. The following table (Table 7) details plans for how Colleges intend to house their students in five to ten years' time (where the data are available).

College	Proportion (%) of students planned to be accommodated in:			
	PBSA on College's main site	PBSA elsewhere in the city, owned by College	PBSA elsewhere in the city, leased by College	Students' own arrangements
Churchill	85	5		10
Clare	50	50		
Clare Hall	60		30	10
Downing	80			20
Emmanuel	70	20		10
Fitzwilliam	54	28		18
Girton	57	43		
Gonville and Caius	60	40		
Homerton	100			
King's	40	50		10
Lucy Cavendish	45	21		34
Magdalene	85			15
Murray Edwards	75	5		20
Pembroke	38	57		5
Peterhouse	79	21		
Selwyn	95	5		
St. Catharine's	77	5	2	16
St. Edmund's	75			25
St. John's	80	20		
Wolfson	80			20

Table 7: Colleges' plans for accommodating students in five to ten years

- 4.36 Only two Colleges (Lucy Cavendish and St. Edmund's) foresee more than 20% of their students arranging their own housing in the private housing market in five to ten years' time.

- 4.37 Two Colleges (Clare Hall and St. Catharine's) intend to accommodate some of their students in accommodation that they lease. The type of accommodation is not stated, but could include student accommodation leased from other Colleges, which is a common arrangement.

Cambridge College interview findings

- 4.38 The Colleges have a strong preference for accommodating students on, or close to, their existing main site. The Colleges with available funds may purchase properties close to their main site as they become available, often from other Colleges. Some are seeking to develop, or have developed, new PBSA on or close to their main College site. Funding models for development and acquisitions vary depending on the financial position of the College. Colleges prefer to build specific developments to meet their particular needs. For example, there is concern that if new rooms are very small but also expensive and not on the main College site, students would simply choose to live out of College-provided accommodation.
- 4.39 The research found that, in terms of accommodation, there is a degree of trading between Colleges. This can be either properties being sold or leased on short- or long-term leases. In terms of the sale of properties currently used to house students, again the position of the Colleges varies. Some are in a financial position to not need to sell properties even if they are able to move students out of them and closer to the main College site. They would instead lease out available properties. Some Colleges would sell properties if they had the opportunity to develop on or close to their main site, as they would need the capital. Colleges may be leasing rooms, houses or purpose-built blocks from other Colleges. The Colleges would not acquire PBSA that had been built speculatively, as it is regarded as not meeting student needs in terms of location and specification.
- 4.40 The type of accommodation that the Colleges need going forward varies between Colleges and depends on the varying needs of their diverse student populations and their different existing accommodation portfolios. For example, some Colleges still have students sharing rooms and would seek opportunities to secure single rooms close to the main College site to reduce the need to share. Some would still develop rooms that are not en suite, because of student demand for affordable accommodation. Plans also depend on the size of the College endowment and their reliance on other income streams, such as the conference trade. Colleges that are reliant on the conference market for revenue may dispose of property if it cannot be upgraded to en suites and would seek to acquire en suite property elsewhere, partly to serve the higher end of the conference market.
- 4.41 There is clear demand for accommodation close to the main College sites and, where possible, a long-term strategy to consolidate the accommodation near to the main site. This supports the collegiate system and enables the Colleges to provide support to students. The proportion of students who do not live in College-provided accommodation varies between Colleges, mostly related to the age and financial position of the College. There are concerns, for example, that students who work on the West Cambridge or Addenbrooke's sites and rent properties close by do not

participate in College life and are missing out on support and the wider benefits of the Cambridge College system, hence the preferred strategy to increase provision for students on or close to the main College sites.

- 4.42 The University's strategy is generally to seek to expand the postgraduate population and keep the undergraduate population static (the University makes a substantial financial loss on undergraduate teaching). The shifting population towards postgraduates and older students means that in the future there is more likely to be demand for accommodation that is not shared and is suitable for couples. However, there will always be a proportion of students that prefer to live out, particularly amongst the older postgraduate population spending a long time in Cambridge. There is strong demand to live in College from postgraduates on one-year courses and, in particular, from overseas students.
- 4.43 There is a lack of knowledge about where the students who are not housed in College accommodation live in the city. Many Colleges know how many students are classed as 'writing up' or who are 'over-running', but do not know how many are still resident in Cambridge.
- 4.44 One issue that arose as part of the strategy of consolidating College sites was the acquisition of properties contiguous to the main site but for which Colleges had not been able to secure permission to use as a large HMO. As a result, these properties are under-occupied.
- 4.45 Some Colleges have firm plans to build or convert more student housing; for some this is already underway, whilst others are in the planning process. One College noted that it had to withdraw a planning application due to objections. Other Colleges have plans for further student housing, but this is contingent on the decisions of other Colleges releasing properties. Finally, one College intends to have a surplus of student accommodation, which it can then lease to other Colleges or expand its own student numbers. Many of the Colleges' plans for future accommodation are intended for postgraduate students, including those with families.

Anglia Ruskin University

Overview

- 4.46 Anglia Ruskin University was founded in 1858 as the Cambridge School of Art. It became a university in 1992 as Anglia Polytechnic University and was renamed Anglia Ruskin University in 2005. Anglia Ruskin University has four campuses (Cambridge, Chelmsford, London and Peterborough), but the information supplied, and reported on here, is in relation to its activities in Cambridge only.
- 4.47 Anglia Ruskin University's Cambridge campus is on East Road on the edge of the city's historic core. The university has sports fields on Huntingdon Road. The wards surrounding the East Road campus, particularly Petersfield and Romsey, are home to many Anglia Ruskin University students.
- 4.48 Anglia Ruskin University has a much smaller stock of its own PBSA and relies more heavily on head lease properties, student accommodation built by third parties, and housing its students in open market housing including HMO.
- 4.49 Information was collected from Anglia Ruskin University using three different approaches. Anglia Ruskin University completed a spreadsheet similar to that provided to HESA, an online survey, and informal conversations with the research team.

Student numbers

- 4.50 Anglia Ruskin University can have up to 11,400 students in Cambridge at any one time. The number of students reported in the online survey (11,400) is higher than the number used in the baseline analysis in Table 1 (9,485). This is because the University has a number of part-time, short-course and distance-learning students. Not all of these students will require accommodation and are therefore excluded from the HESA data used for the baseline analysis in Table 2. Anglia Ruskin University is aware that some of its students were already residents of the city before starting their courses and some live outside the city and commute for classes; however, it does not know how many students this applies to.

Accommodating students

- 4.51 Anglia Ruskin University provides (or facilitates access to) some accommodation and students also make their own arrangements.
- 4.52 The data in this section differ from the baseline data in Table 2, which is based on the HESA data and excludes part-time students, and is self-reported data about accommodation. The information below was supplied through the online survey and reflects Anglia Ruskin University's housing portfolio.
- 4.53 In the online survey, Anglia Ruskin University reported that it owns (or long-term leases) PBSA that houses 543 students. It also reported that it rents ordinary housing

stock from private owners to use as student accommodation; 27 houses or flats are leased, which accommodate 143 students.

- 4.54 Anglia Ruskin University has arrangements with local landlords to accommodate further students. According to the online survey response, Anglia Ruskin University has formal nomination agreements with landlords that result in housing for 1,239 students, and informal arrangements that accommodate an estimated 2,000 students. Furthermore, 100 Anglia Ruskin University students are reported as living in homestay accommodation. Anglia Ruskin University estimates that the balance of students arrange their own accommodation.

Future plans

- 4.55 Anglia Ruskin University reported that it plans to stay the same size in Cambridge over the next five to ten years. Over this period, Anglia Ruskin University reported in the online survey that it estimates it will provide accommodation in the following ways (Table 8).

Type of accommodation	Proportion of students accommodated this way
PBSA on the main site	5%
PBSA elsewhere in Cambridge, leased by Anglia Ruskin University	11%
Leasing arrangements between Anglia Ruskin University and private landlords	1%
Students arranging their own accommodation	83%

Table 8: The provision and type of student accommodation for Anglia Ruskin University students in the next five to ten years' time

The age of students: implications for accommodation type

- 4.56 The age of students has implications for the type of accommodation that might be needed, or preferred. This contextual information helps to inform the analysis of current and future housing need in the next chapter of the report.
- 4.57 There are no defined standards for the different types and ages of students, but a reasonable summary of current attitudes might be as follows:
- For undergraduates, aged between 17 and 22, single bedrooms with shared bathroom and kitchen facilities may be acceptable (although most institutions are currently building or converting to en suite bathrooms, primarily for letting to the out-of-term conference and visitor trade).
 - For postgraduates, aged 22 to 27, who have continued on from their undergraduate course to a Master's or PhD course, single en suite rooms with shared kitchen facilities may still be acceptable, although the location of accommodation together with other postgraduates, rather than with undergraduates, is generally preferred.
 - For students undertaking one-year courses (such as a Master's degree), or who are from overseas, College or University purpose-built accommodation is generally preferred.
 - For older students, over 25, whether undergraduate or postgraduate, who are likely to be students for at least the three years of a first degree or a PhD, self-contained accommodation is more likely to be preferred. Although data are not systematically collected on students' own households, many students of this age are likely to have partners, and require one-bedroom accommodation, and older age groups may have children, and require family accommodation.
 - The universities are generally of the view that the age of postgraduates is likely to rise over time, as postgraduate numbers expand, and this will have an impact on the type of accommodation required in the future.

4.58 The current proportions in the different age groups of full-time students at both universities is shown in Figure 7.

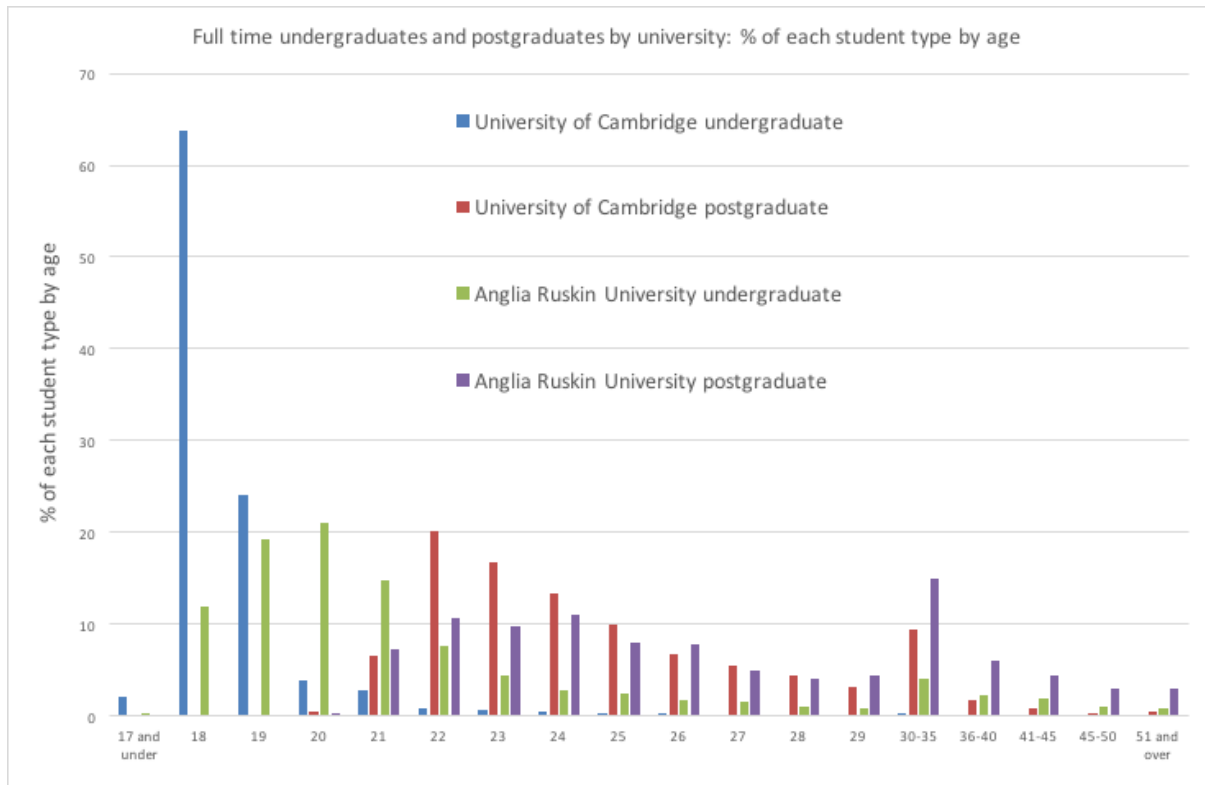


Figure 7: Cumulative % of full-time university students by age

4.59 Key points:

- Exactly a third of students at each university are aged 23 or more.
- Anglia Ruskin University has a higher proportion of full-time students at higher ages than the University of Cambridge, with 18% aged 27 or over, compared to 12% at the University of Cambridge.

4.60 Figures 8 and 9 (overleaf and on page 45) show the age on admission of University of Cambridge and Anglia Ruskin University full-time students separately for comparison.

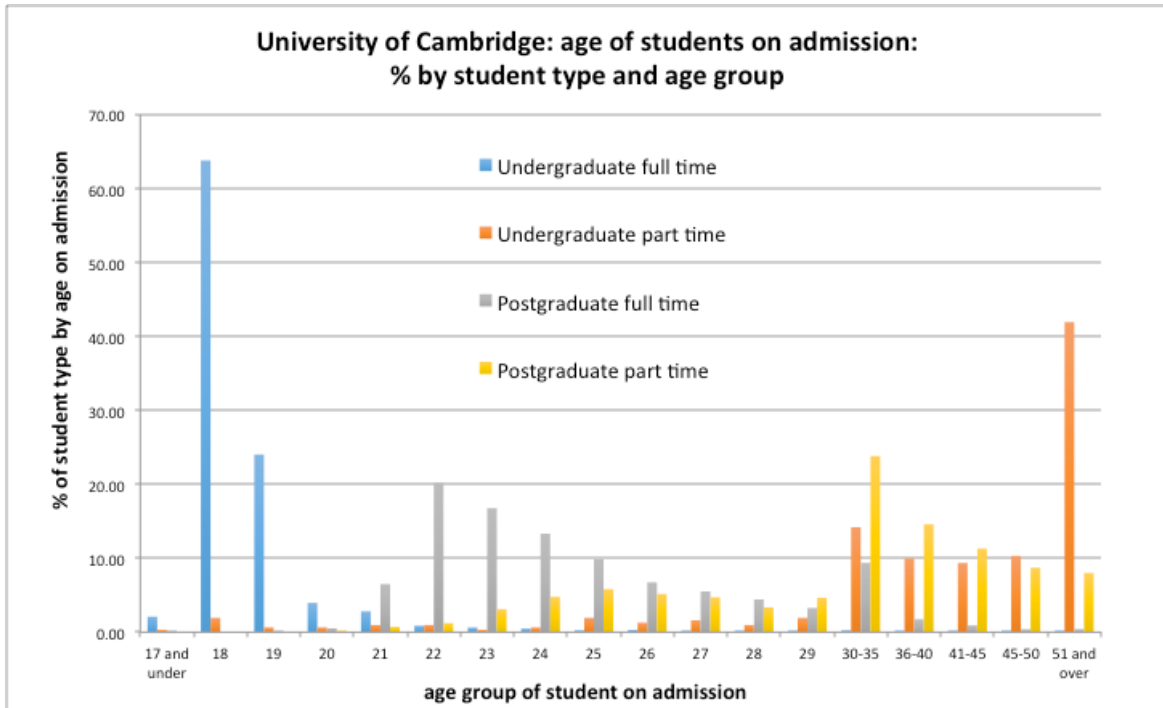


Figure 8: University of Cambridge age of students on admission

4.61 Key points:

- Undergraduates at the University of Cambridge are in a much tighter age band than those at Anglia Ruskin University: 63% of all University of Cambridge undergraduates are aged 18 or less on admission (and will therefore graduate at younger ages than Anglia Ruskin University students).
- Only about 10% of University of Cambridge undergraduates take a 'gap year' before admission: among subjects, gap years are encouraged in Engineering, and discouraged in Mathematics.

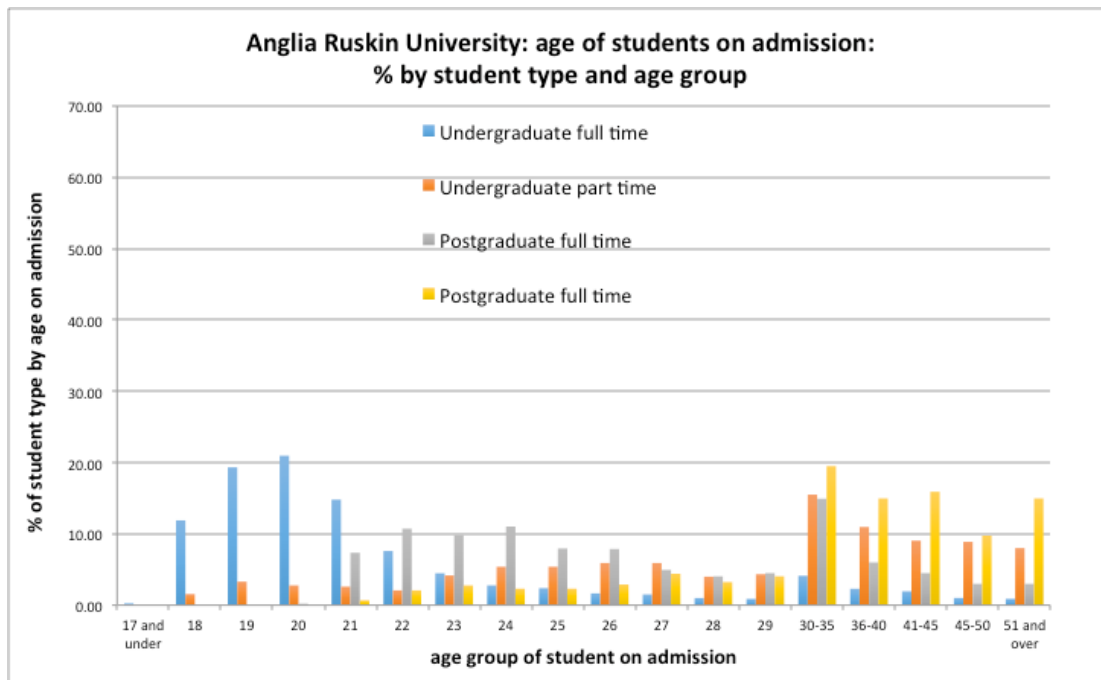


Figure 9: Anglia Ruskin University age of students on admission

4.62 Key points:

- Only 12% of Anglia Ruskin University undergraduates are aged 18 or less on admission, with nearly 15% aged 21 on admission, compared to less than 3% at the University of Cambridge.
- 15% of part-time undergraduates, and 20% of part-time postgraduates, are aged 30 or more on admission at Anglia Ruskin University, compared to 14% and 24% at the University of Cambridge, although Anglia Ruskin University has more part-time undergraduates (574) than the University of Cambridge (310), and fewer part-time postgraduates (861) than the University of Cambridge (1,549).
- Anglia Ruskin University has more part-time undergraduates and postgraduates aged 30 or more (1,251) than the University of Cambridge (948), and, of these, Anglia Ruskin University has a higher number aged 51 or more (254) than the University of Cambridge (175).
- While many part-time students aged 30 or more may commute to Cambridge during contact hours, others may also choose to move to the Cambridge area, either as part of a career change or early/semi-retirement.

Non-university institutions

Overview

- 4.63 Information was primarily collected from an online survey of other educational institutions in Cambridge (completed by 24 institutions). In addition, a shortened version of the online survey was developed to gather information by telephone for those institutions unwilling or unable to complete the online survey (this option was used by a further 12 institutions).
- 4.64 To boost participation amongst educational institutions, reminder emails and letters were sent and telephone calls were made over a period of six weeks. Despite this, 5 educational institutions did not respond (2 summer schools, 1 language school, 1 performing arts college, and 1 theological college). Overall, this gives a response rate of 88%. The institutions that were contacted are listed in Appendix 1.
- 4.65 Of the responding institutions, 16 were language schools, 3 were summer schools, 7 were theological colleges⁵ and 10 were independent colleges, sixth forms or schools.
- 4.66 This section begins by giving an overview of the maximum number of students that might study in Cambridge at these institutions during the year. It goes on to explain that not all students will be here at the same time (e.g. because some courses only operate in the summer holidays). It also explains that not all of the students will require accommodation (e.g. because they live with their parents in the local area). Some students may only require short-term accommodation (e.g. if studying on language courses that are a few weeks long). The analysis outlines the number of students who are taking courses of at least one academic year and who therefore will need longer-term accommodation. This section then analyses where the students are currently accommodated.
- 4.67 These educational institutions in Cambridge offered a wide range of courses across all age ranges (Table 9).

⁵ The theological colleges are affiliated with the University of Cambridge (with some also affiliated to Anglia Ruskin University); however, they are not included in the HESA statistics for either university so have been included as an 'other' educational institution operating within Cambridge.

Type of institution	Type of course	Age ranges				
		Under 16	16-18	18-21	21-24	Over 24
Language schools	Foundation year courses		✓	✓		
	Preparation for university courses				✓	
	Language courses	✓	✓	✓	✓	✓
	Other	✓	✓			✓
Summer schools	Language courses	✓	✓			
	Other	✓	✓			✓
Theological colleges	Postgraduate taught or research courses				✓	✓
	Undergraduate degree or diploma courses				✓	✓
	Foundation year courses					✓
	Other			✓	✓	✓
Independent colleges, sixth forms or schools	Undergraduate degree or diploma courses			✓	✓	✓
	Foundation year courses		✓	✓	✓	✓
	Preparation for university courses		✓	✓		
	A level/IB courses		✓	✓	✓	✓
	GCSE or similar	✓	✓			
	Language courses	✓	✓	✓	✓	
	Other	✓	✓	✓		

Table 9: The types of courses offered by different types of educational institutions, and the ages of students on these courses

Note: 'Other' courses include Easter revision courses, non-accredited courses, summer schools (where this was not the main business) and vocational courses.

4.68 Table 9 shows that language schools predominantly run courses for those aged up to 18 (but do have older students too), while summer schools cater for students aged 18 or under. The theological colleges tend to have students aged 21 or over, and the independent colleges, sixth forms and schools have students across the age ranges but focus on those aged 16-24.

Student numbers

4.69 The size of these institutions varied widely, from fewer than 20 students at a time up to 5,000 (Cambridge Regional College). The following table (Table 10) shows the size of these institutions in Cambridge.

Maximum number of students	Number of institutions
50 or fewer	6
51-150	8
151-250	9
251-350	5
351-800	5
More than 800	2
Total	35

Table 10: The maximum likely number of students in the institution at any one time

4.70 All responding institutions were asked for the maximum likely number of students they have on courses at any one time. Simply adding these student numbers together creates a total of 15,435 students. However, the maximum number of students in Cambridge at any one time will be lower than this as the students are not all in the city at the same time. For example, some institutions operate a higher capacity during the university holiday times, the summer schools only run at these times, and some run courses in term time only. The following chart (Figure 10) shows the number of students in each type of educational institution.

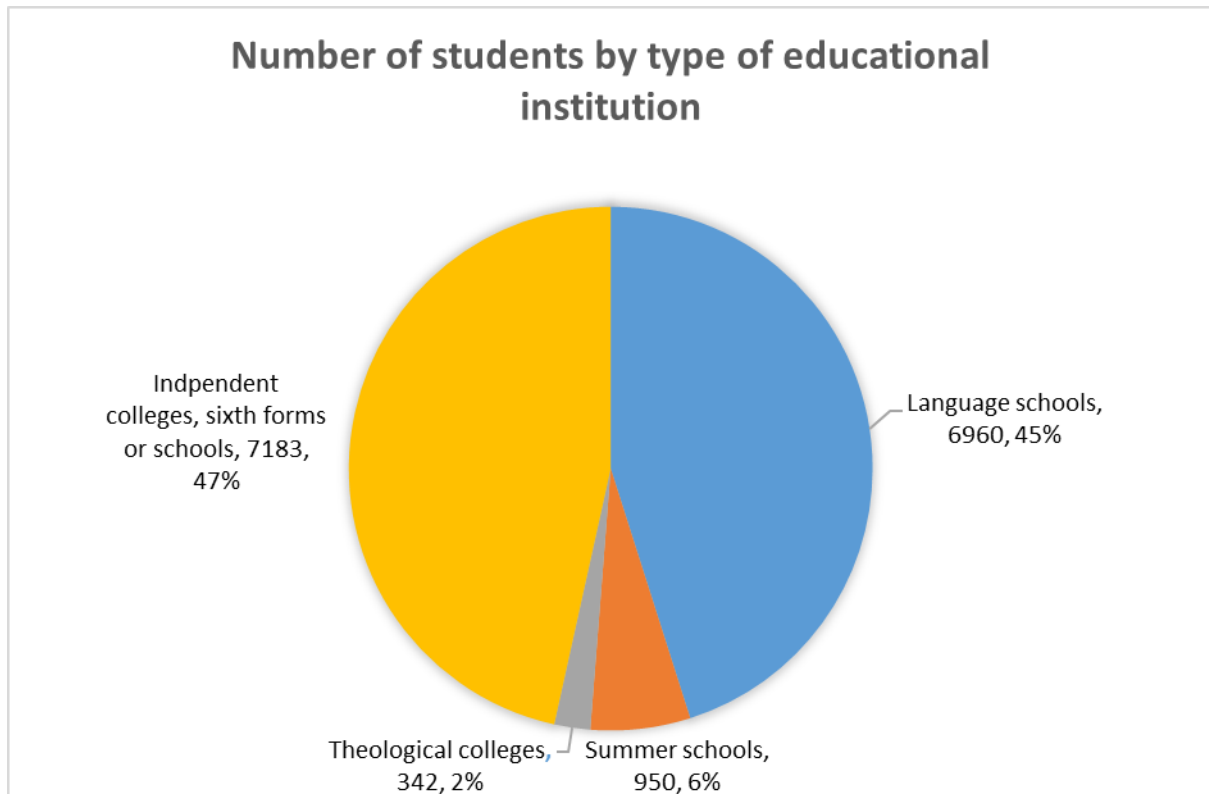


Figure 10: Maximum number of students attending each type of non-university educational institution

4.71 As noted, not all educational institutions in Cambridge will have students at the same time. The theological colleges predominantly teach during term time and summer schools are usually in the holiday times (some also running over the Easter holiday). The majority of independent colleges, sixth forms and schools run courses during term time; however, some run courses over the full year, and language courses are run during term time, holidays and throughout the year. Overall, some courses may run whilst others are on a break, but others will run concurrently. Furthermore, some students may reside in Cambridge all year round, despite their course only being taught during term time. These issues make it problematic to estimate how many students may be in Cambridge at any one time, but it is logical to assume that this will be fewer than the sum of the capacities of the institutions.

4.72 Based on the information provided by institutions, we estimate that around 6,000 of the 15,435 students are on courses that last at least one academic year.

- 4.73 Not all of the students attending these institutions live in Cambridge or require accommodation for the duration of their course. For most of the independent colleges, sixth forms and schools (e.g. Cambridge Regional College), many of their students already live locally, with only those new to the city (or the country) requiring new accommodation. Further, two of the theological colleges did not have any students living in the city; their courses were all distance learning. Finally, 16 institutions were aware of some of their students living outside of Cambridge and commuting in for their courses. Whilst not all institutions knew how many students commuted, those who could estimate suggested that roughly 300 students did so.
- 4.74 From the information provided by most of the institutions, it is possible to estimate the number of students who require some form of accommodation in Cambridge.
- 4.75 Using the information supplied on numbers of students in different types of accommodation arranged or provided by the institution (and any information on how many students make their own arrangements), we estimate that approximately 10,116 students of other educational institutions require accommodation of some form, even if only for a short period of time (Table 11). This is around 65% of the maximum number of students who could attend these institutions. Some of these may be on short courses and the next section of the report analyses where they are accommodated.

Sum of the capacities of other educational institutions in Cambridge	15,435
Students not requiring accommodation: Distance learners	15
Students not requiring accommodation: Commuters	300
Students not requiring accommodation: Other – e.g. living in the parental home, already living in the city prior to starting a course	5,004
Students requiring accommodation in Cambridge	10,116

Table 11: Students requiring accommodation in Cambridge

Accommodating students

- 4.76 Some institutions accommodate some or all of their students in a way that does not increase the overall pressure on the housing market, by using existing stock efficiently. Institutions achieved this by using existing PBSA owned by other institutions during the holidays (e.g. university accommodation), or by making homestay arrangements for students.
- 4.77 Both summer schools who responded only used university accommodation during the holidays. This means that the existing accommodation for term-time students is being used more effectively and for different student groups. The summer schools accommodate 750 students in university accommodation during the holidays.
- 4.78 Twenty-three institutions accommodate some, or all, of their students in homestay arrangements. Homestays arranged by educational institutions can accommodate 4,390 students per year. Taken together, the homestays and use of university accommodation in the holidays accommodates an estimated 5,140 students in the city.

- 4.79 The majority of the other educational institutions in Cambridge accommodate some, or all, of their students in PBSA either owned or leased by the institution. Eighteen educational institutions in Cambridge own, or long-term lease, some PBSA and this accommodates 2,052 students. Eighteen institutions short-term lease PBSA (including the use of University College accommodation by summer schools) and this accommodates 1,784 students.
- 4.80 Four educational institutions secure accommodation for their students via other means. One has formal nomination agreements with landlords which allows them to nominate students to vacancies; this accommodates up to 15 students. Three institutions have informal arrangements with landlords or private families who regularly provide accommodation but are not homestay arrangements; this accommodates up to 340 students. Combined, these approaches can accommodate 355 students.
- 4.81 Finally, other educational institutions in Cambridge are aware of some students who arrange their own accommodation. Some could not quantify this number (e.g. reporting “a small number”), whilst others were aware of how many students did this. Using the information provided by the institutions, we estimate that 785 students arrange their own accommodation in the city.
- 4.82 Overall, the other educational institutions accommodate (or arrange accommodation for) all but 8% of those students requiring accommodation; 785 students make their own arrangements, independently of the institution (Figure 11).

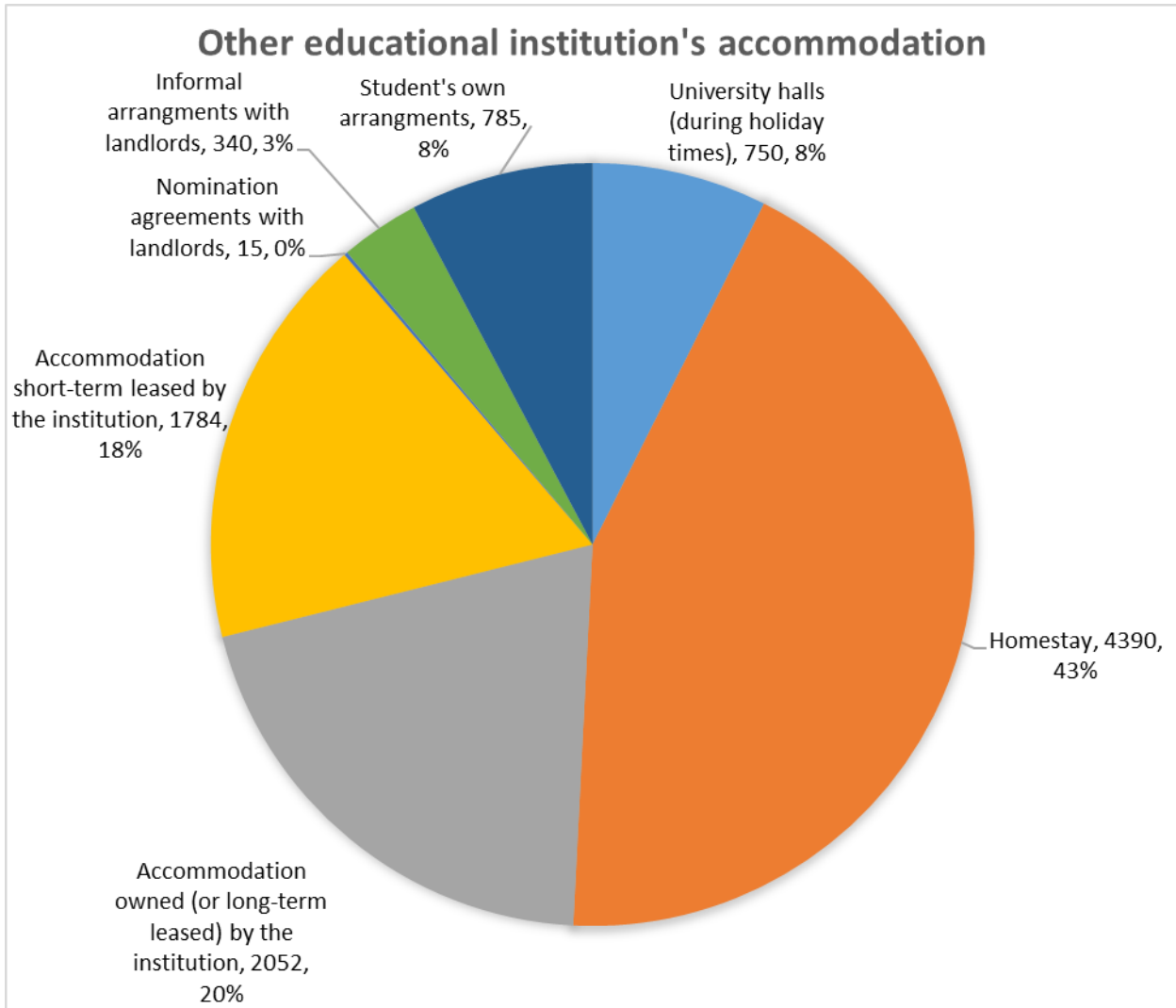


Figure 11: How educational institutions accommodate students

Future plans of institutions

4.83 The survey asked about future plans for expansion (or decline) (Table 12). The institutions were also asked how their total student accommodation is likely to be provided in five to ten years' time.

4.84 Only 2 institutions expected to reduce their activities in Cambridge over the next five years (1 summer school and 1 language school), with a further 12 institutions expecting to stay the same size.

4.85 Seventeen institutions expected to expand their activities in Cambridge over the next five years. Not all institutions provided details about their expected rate of expansion, and the plans that were given showed wide variations. Expansion plans may be aspirational and not necessarily achieved.

Institution	Expansion rate by course						
	PG	UG	Foundation	A level	GCSE	Language	Other
Wesley House	800%						
Woolf Institute	20%	10%					
CSVPA	5%	5%	5%				
Reach							10%
Regent							5%
Bell			200%				10%
St. Andrews				10%	15%	10%	

Table 12: Other educational institutions' rates of growth by course type

- 4.86 Wesley House plans to increase its postgraduate numbers by 800%. There are currently 12 postgraduates; an 800% increase would lead to 96 additional students and an institutional total of 108 students in five to ten years' time.
- 4.87 Woolf Institute plans to increase the number of postgraduate students by 20% (currently 50 students, so the increase would result in 10 additional students) and the number of undergraduate students by 10% (currently 25, so the increase would result in 3 extra students). Overall, Woolf Institute has 150 students, which would increase to 163 students in five to ten years' time.
- 4.88 Cambridge School of Visual and Performing Arts (CSVPA) intends to increase the number of postgraduates, undergraduates and foundation course students by 5% each. CSVPA currently has 50 undergraduates and 300 students on foundation courses; a 5% increase in both of these would result in an extra 3 undergraduates and 15 foundation students. CSVPA did not provide information on current postgraduate numbers, so this increase cannot be calculated. Based on the information provided, CSVPA has 350 students, which would increase to at least 368 students in five to ten years' time.
- 4.89 Reach intends to increase the number of students on 'other' courses by 10% over the next five to ten years. Reach currently has 180 students on these courses (specified as short courses), which would lead to an additional 18 students. Overall, Reach has 200 students, which would increase to 218 in five to ten years' time.
- 4.90 Regent did not provide data on the number of students on 'other' courses, so the intended increase of 5% cannot be translated to additional student numbers.
- 4.91 Bell intends to increase the number of foundation course students by 200%. There are currently 40 foundation course students, so this increase would result in 80 additional students. Bell did not provide data on the number of students on 'other' courses, so the planned rate of expansion of 10% cannot be equated to student numbers. Overall, Bell has 320 students, increasing to at least 400 students in five to ten years' time.
- 4.92 St. Andrews plans to increase the number of students on A-level courses by 10% (currently 39, so the increase would result in 4 additional students) and GCSE students by 15% (currently 8, so the increase would result in 1 extra student). St. Andrews did not provide information on the current number of students on language

courses, which it intends to increase by 10%. Overall, St. Andrews has 145 students, increasing to at least 150 students in five to ten years' time.

- 4.93 Across these institutions, if future plans for growth are achieved, this could mean at least a further 230 students taking courses in other educational institutions. This does not account for any additional students in the institutions that suggested they would expand but could not quantify by how much.
- 4.94 Wesley House (96 additional students) and Woolf Institute (13 additional students) may accommodate some of these additional students in college, and Reach is a summer school so these students are likely to be accommodated in university accommodation during the holidays.
- 4.95 The additional 103 students associated with the other institutions listed are likely to lead to an increase in demand for student housing in Cambridge.

Future accommodation plans

- 4.96 One institution (Wesley House) intends to accommodate all of its students in PBSA on its main site.
- 4.97 Two institutions (EC Cambridge and St. Andrews) intend to accommodate all their students in PBSA that they own but that is not on their main site.
- 4.98 Two institutions (Oxford Study Courses and Kaplan International) plan to accommodate their students in PBSA that the institution leases (Oxford Study Courses only use university accommodation during the holidays).
- 4.99 Two institutions (Cambridge Academy of English and Cambridge Centre for Languages) plan to accommodate all their students through arrangements between their institutions and private landlords.
- 4.100 Finally, 1 institution (OISE Cambridge) intends for all of its students to make their own arrangements for accommodation.
- 4.101 The other 11 institutions that provided information on their future accommodation plans intended to accommodate their students via a range of arrangements in five to ten years' time, including: PBSA (or converted) on their main site; PBSA (or converted) on sites elsewhere in the city but owned by the institution; PBSA (or converted) on sites elsewhere in the city but owned by others; increased use of leasing or other similar arrangements with private landlords; and the balance of students continuing to have to find their own accommodation.

Summary

4.102 Based on the data collected, the following can be summarised:

- All responding institutions were asked for the maximum likely number of students they have on courses at any one time. Simply adding these student numbers together reaches a total of 15,435 students. However, the maximum number of students in Cambridge at any one time will be considerably lower than this as the students are not all in the city at the same time.
- Approximately 6,000 of these 15,435 students are on courses that last at least one academic year.
- Approximately 10,116 of these 15,435 students require accommodation in Cambridge of some form, even if short term.
- Taken together, the homestays and use of halls in the holidays accommodates an estimated 5,140 students.
- Eighteen educational institutions in Cambridge own, or long-term lease, some PBSA, and this accommodates 2,052 students.
- Eighteen institutions short-term lease PBSA and this accommodates 1,784 students.
- Four educational institutions secure accommodation for their students via other means (e.g. informal arrangements with landlords or private families). Combined, these approaches can accommodate 355 students.
- This leaves an estimated 785 students who arrange their own accommodation in the city.
- If future plans for growth are achieved (based only on the institutions that provided sufficient data to make an estimate in Table 12), this could mean at least a further 230 students taking courses in other educational institutions in five to ten years' time who will require accommodation.

4.103 The next section of the report analyses the current level of PBSA and the future potential level. The current and future potential for PBSA is the amount of PBSA that would be needed to accommodate all of the students who are not currently housed by their educational institution or living in existing family housing, and those students generated by the future growth proposals of the institutions.

5 Existing and future projections for PBSA

- 5.1 This section analyses the current and future potential level of PBSA in the city. This is the level of PBSA that would be needed to accommodate all of the students who are not currently housed by their educational institution in PBSA or living in existing family housing – that is, to accommodate all of the students who currently had selected ‘Own permanent residence owned or rented by you’ and ‘Other rented accommodation (shared with others on a temporary basis)’ as their current accommodation, and those students generated by the growth plans of the institutions.
- 5.2 It draws mainly on the HESA data for the two universities, with contextual information drawn from the online surveys in Section 3 above.
- 5.3 The two universities have different characteristics, and the research developed estimates for Anglia Ruskin University and the University of Cambridge separately, based on their different student profiles and future growth plans, as outlined below.

Estimating the level of PBSA

- 5.4 This section provides estimates of the current and future potential level of PBSA in the city (that is, the level of PBSA that would be needed to accommodate all of the students who are not currently housed by their educational institution in PBSA or living in existing family housing), the extent to which this is met by existing ‘street’ housing stock used as shared housing for students, and the extent to which this might be released into the open housing market if more PBSA were available.
- 5.5 This section also provides an estimate for the effect of planned growth in the university sector to 2026: this is primarily potential growth in postgraduate numbers at the University of Cambridge; a smaller potential growth in the University of Cambridge undergraduate numbers; and an overall static position for Anglia Ruskin University.

The baseline position

- 5.6 The table overleaf (Table 13) repeats the estimate of the baseline position in 2015/16, from Tables 2 and 3, for ease of reference.

Baseline: 2015/16 student accommodation: numbers of students										
		Purpose Built Student Accommodation		Shared existing housing		Existing family housing		No information		Total
		University/College maintained	Private halls	Other rented	Own home	Parental/guardian home	Homestay	Other	Not known	
University of Cambridge	Undergraduate	10745	44	503	226	22		13	262	11815
	Postgraduate (1 year)	2240	59	212	220	68		26	277	3102
	Postgraduate (2+ years)	2890	241	1278	1293	78		105	425	6310
	Subtotal	15875	344	1993	1739	168		144	964	21227
Anglia Ruskin University	Undergraduate	901	435	2090	2195	2091		347	94	8153
	Postgraduate (1 year)	156	50	295	219	131		41	28	920
	Postgraduate (2+ years)	45	18	132	139	45		27	6	412
	Subtotal	1102	503	2517	2553	2267		415	128	9485
Total Universities	Undergraduate	11646	479	2593	2421	2113		360	356	19968
	Postgraduate (1 year)	2396	109	507	439	199		67	305	4022
	Postgraduate (2+ years)	2935	259	1410	1432	123		132	431	6722
	Total Universities	16977	847	4510	4292	2435		559	1092	30712
Non-university institutions		750	3836	355	0	5304	4390	0	785	15420
	Total all institutions	17727	4683	4865	4292	7739	4390	559	1877	46132

Table 13: The baseline position of number of students 2015/16

5.7 The table below (Table 14) shows a summary of the overall student numbers by the four broad categories of accommodation type.

Baseline: 2015/16 student accommodation: numbers of students by broad category of accommodation					
	Purpose Built Student Accommodation	Shared existing housing	Existing family housing	No information	Total
University undergraduate	12125	5014	2113	716	19968
Postgraduate (1 year)	2505	946	199	372	4022
Postgraduate (2+ years)	3194	2842	123	372	6531
Total university	17824	8802	2435	1651	30712
Non-university institutions	4586	355	9694	785	15420
Total all institutions	22410	9157	12129	2436	46132

Table 14: Number of students by accommodation type in Cambridge 2015/16

- 5.8 As noted earlier, students self-select which category of accommodation they consider themselves to be occupying. The table above shows that virtually equal numbers of students in both Anglia Ruskin University and the University of Cambridge had selected 'Own permanent residence owned or rented by you' and 'Other rented accommodation (shared with others on a temporary basis)'.
- 5.9 It appears implausible that over a quarter (27%) of all Anglia Ruskin University students, and a fifth (21%) of University of Cambridge postgraduates on courses of two or more years, either own or rent their own independent accommodation. Although some may do so, it would seem more probable that many are in fact sharing accommodation with others, even if this may be with one or more lodgers in order to share costs.
- 5.10 There are no data to confirm this supposition nor to estimate how many students are actually sharing their 'own accommodation' with others. Given the very different characteristics of students at Anglia Ruskin University and those at the University of Cambridge, different estimates or hypotheses are discussed below for each university.

Estimating the current potential provision for PBSA

- 5.11 The table overleaf (Table 15) summarises the overall position for university student accommodation in the city. The table presents an estimate of the current potential provision for PBSA that, if built, would absorb all students currently living in shared houses in the city (including in this category both 'other rented' and 'own home'). The estimate is calculated by deducting from the total number of students:
- All those already living in PBSA.
 - All those currently living in the parental home.
 - All those for whom there is no information (1,651 students, or 5% of the total 30,712).
- 5.12 This would result in 8,802 bed spaces to be provided in PBSA (Table 15), which would allow the return of all shared houses currently occupied by students to the open market.
- 5.13 The number of houses that might be released is dependent upon the average number of students living in each shared house. If there are 5 students on average in each shared house, then 1,760 houses could be returned to the open market, while if the average number of students in each shared house is 3.5, then 2,515 houses could be returned to the open market.

Two universities: summary of existing accommodation and potential for PBSA										
	Total	Purpose Built Student Accommodation		Estimated number of houses currently shared		Existing family housing		No information		PBSA level
		University / College	Private halls	Other rented	Own home	Parental home and homestay				
Undergraduate	19968	11646	479	2593	2421	2113		360	356	5014
Postgraduate (1 year)	4022	2396	109	507	439	199		67	305	946
Postgraduate (2+ years)	6722	2935	259	1410	1432	123		132	431	2842
Total Universities	30712	16977	847	4510	4292	2435		559	1092	8802

Table 15: Maximum potential level of PBSA provision to address current and future student numbers

5.14 The estimate in the table above is clearly a ‘maximum’ position, which assumes that all students, irrespective of their age, type of course, and personal preferences, would choose to live in PBSA if it were available. It also assumes that the students who self-reported that they live in ‘other rented’ accommodation and their ‘own home’ currently share housing.

5.15 However, the two universities have different characteristics, and the next sections present estimates for Anglia Ruskin University and the University of Cambridge separately.

Anglia Ruskin University

5.16 Anglia Ruskin University is planning to remain at the same student numbers in Cambridge over the next five to ten years, and does not plan to invest directly in additional PBSA, relying on the private market for any further supply.

5.17 The table below (Table 16) shows the baseline position in 2015/16.

Anglia Ruskin University baseline: 2015/16 student accommodation: numbers of students										
		Purpose Built Student Accommodation		Shared existing housing		Existing family housing		No information		
		University owned	Private halls	Other rented	Own home	Parental home	Homestay	Other	Not known	Own home + shared as % of total
Undergraduate	8153	901	435	2090	2195	2091		347	94	52.56%
Postgraduate (1 year)	920	156	50	295	219	131		41	28	55.87%
Postgraduate (2+ years)	412	45	18	132	139	45		27	6	65.78%
Total	9485	1102	503	2517	2553	2267		415	128	53.45%

Table 16: Anglia Ruskin University number of students 2015/16

5.18 In the case of Anglia Ruskin University, 1,102 undergraduates had selected ‘University maintained’ as their accommodation, whereas Anglia Ruskin University only owns around 700 bed spaces and has nomination rights to a further 484. It seems probable that a number of Anglia Ruskin University undergraduates will be living in private halls, obtained through the student accommodation service but where Anglia Ruskin University does not have formal nomination rights. A number of halls are listed on the Anglia Ruskin University website under the title ‘Our properties are:’, but at least 750 of

these rooms are neither owned nor managed by Anglia Ruskin University. The table assumes that all Anglia Ruskin University undergraduates selecting 'University maintained' are living in PBSA.

- 5.19 The table shows that over half of all Anglia Ruskin University undergraduates, and two thirds of Anglia Ruskin University postgraduates on courses of two or more years, are living either in 'Own permanent residence owned or rented by you' or in 'Other rented accommodation (shared with others on a temporary basis)'.
- 5.20 The table below (Table 17) gives an estimate of the current potential for PBSA that, if built, would absorb all Anglia Ruskin University students currently living in shared houses in the city.

Anglia Ruskin University baseline: 2015/16 student accommodation: numbers of students										
		Purpose Built Student Accommodation		Shared existing housing		Existing family housing		No information		
	Total	University owned	Private halls	Other rented	Own home	Parental home	Homestay	Other	Not known	Current potential for PBSA
	A	B	C	D	E	F	G	H	I	(Column A minus columns
Undergraduate	8153	901	435	2090	2195	2091		347	94	4285
Postgraduate (1 year)	920	156	50	295	219	131		41	28	514
Postgraduate (2+ years)	412	45	18	132	139	45		27	6	271
Total	9485	1102	503	2517	2553	2267		415	128	5070

Table 17: Current potential for PBSA for Anglia Ruskin University

- 5.21 The table shows, assuming that the numbers of students living in the parental home plus those whose accommodation is unknown do not change, that Anglia Ruskin University would need to obtain nomination rights to 5,000 rooms in private halls over the next five to ten years if all students needing PBSA were to be accommodated.
- 5.22 85% of the current potential is for accommodation for undergraduates (presumably in the form of cluster flats), rising to 95% if postgraduates on one-year courses are included.
- 5.23 The table overleaf (Table 18) estimates that this might release between 1,000 and 1,450 existing houses back into the market, depending upon assumptions about the average number of students living in each shared house.

Anglia Ruskin University baseline: 2015/16 student accommodation: numbers of shared houses										
	Total	University/ College owned	Private halls	Other/not known	Parental home	Own home	Shared housing (student numbers)	Shared housing (numbers of houses) @ 5 students per house	Shared housing (numbers of houses) @ 3.5 students per house	Own home + shared as % of total
Undergraduate	8153	901	435	441	2091	2195	2090	857	1224	52.56%
Postgraduate (1 year)	920	156	50	69	131	219	295	103	147	55.87%
Postgraduate (2+ years)	412	45	18	33	45	139	132	54	77	65.78%
Total	9485	1102	503	543	2267	2553	2517	1014	1449	53.45%

Table 18: Estimated number of shared houses occupied by Anglia Ruskin University students

5.24 However, Anglia Ruskin University would continue to be in competition with both the University of Cambridge Colleges and the non-university educational institutions for any new supply of PBSA by commercial providers, and it is not clear that it would be feasible to acquire additional supply on the scale implied by these estimates.

5.25 In addition, the number of students who might not choose, or wish, to live in PBSA needs to be taken into account, particularly given the age profile of Anglia Ruskin University students, as discussed in the next section. There is no guarantee that all students would wish to live in PBSA: many might prefer to live in the relatively independent, and unsupervised, shared housing market.

The ages of Anglia Ruskin University students: accommodation implications

5.26 Anglia Ruskin University has a significant proportion of full-time undergraduates aged 25 or over on admission to their course, with 1,457 (18%) of all full-time undergraduates aged 25 or more, of whom 845 (10%) were aged 30 or more.

5.27 Similarly, among postgraduates, 810 (61%) of all full-time postgraduates were aged 25 or more on admission to their course, of whom 419 (31%) were aged 30 or more.

5.28 It appears reasonable to assume that undergraduates aged 25 to 29, and postgraduates on one-year courses and aged 25 or more, might be willing to share a house with other similar students, and that undergraduates aged over 30, and postgraduates aged over 25 and on courses of two or more years might choose (and be able to afford) to live independently.

5.29 Many of the undergraduates aged 30 or more may already have partners, and many will also have children. If these households are already living in their own accommodation (probably in the wider Cambridge area, rather than all within the city), then the number of students actually living in 'Own permanent residence owned or rented by you' will be larger than assumed in the baseline tables above (which assumed that all students selecting 'own home' were in reality sharing with others). This would reduce the number of shared houses occupied by students that might be released into the open market if more PBSA became available.

5.30 The table below (Table 19) suggests an estimate of the numbers of older students and their possible housing choices, based on the following assumptions:

- a. That undergraduates aged 25-29 will choose to share a house with others, but with fewer sharers: the estimate assumes 2.5 students per house. The lower sharing rate of 2.5 people per shared property is an estimate based on knowledge of housing preferences, but not on data collected for this study.
- b. That undergraduates aged 30 or more will choose to live in their own self-contained accommodation, without sharing with other students.
- c. That postgraduates on one-year courses will choose to share a house with others, but with fewer sharers: the estimate assumes 2.5 students per house.
- d. That postgraduates on courses of two or more years will choose to live in their own self-contained accommodation, without sharing with other students.

Hypothetical housing choice for 25+ students			
	Own house (number of students)	Shared house (number of students)	Number of shared houses
Undergraduate 25-29		612	245
Undergraduate 30+	845		
Postgraduate (1 year) 25-29		256	102
Postgraduate (1 year) 30+		228	91
Postgraduate (2+ years) 25-29	135		
Postgraduate (2+ years) 30+	191		
Total	1171	1096	438

Table 19: Houses potentially occupied by Anglia Ruskin University students aged 25+

5.31 The table suggests that rather more than 1,000 mature students might prefer to live independently, and that a further 1,000 or so mature students might prefer to share a house with similar students. Assuming that a lower occupancy, averaging 2.5 students per flat or house, would also be preferred, this would result in around 438 shared houses required by mature student sharers.

5.32 This assumption would have the effect of increasing the number of shared houses currently occupied by Anglia Ruskin University students (because the average number of students per property would be less).

5.33 If these assumptions are considered reasonable, then the numbers of PBSA units required to accommodate full-time students under 25 would reduce from 5,070 (the estimated level of PBSA in Table 16) to 2,803 (5,070 less 1,171 in 'own house', less 1,096 remaining in shared houses).

5.34 The numbers of properties that might be released into the open market would also be significantly reduced. 1,171 students would be living in their own homes; 1,096 would be living in 438 shared houses (at 2.5 students per house); and between 560 houses (2,803 students at 5 students per house) and 800 houses (2,803 students at 3.5 students per house) would be returned to the open market, following the construction of the 2,803 rooms in PBSA.

University of Cambridge

5.35 The table below (Table 20) shows the baseline position in 2015/16 and potential number of shared houses currently occupied by University of Cambridge students.

University of Cambridge: current baseline @ 2015/16									
	Total	University/College owned	Private halls	Other/not known	Parental home	Own home	Shared housing (student numbers)	Shared housing (numbers of houses) @ 5 students per house	Shared housing (numbers of houses) @ 3.5 students per house
Undergraduate	11815	10745	44	275	22	226	503	101	144
Postgraduate (1 year)	3102	2240	59	303	68	220	212	42	61
Postgraduate (2+ years)	6210	2890	241	430	78	1293	1278	256	365
Total	21127	15875	344	1008	168	1739	1993	399	569

Table 20: Estimated number of shared houses occupied by University of Cambridge students

5.36 The table contains a number of key assumptions:

- a. No allowance has been made for sharing among students selecting 'Own permanent residence owned or rented by you'.
- b. Students selecting 'Private halls' are assumed to be distinguishing correctly between those owned by Colleges and those owned by commercial providers.
- c. The numbers selecting 'Other rented accommodation (shared with others on a temporary basis)' are assumed to be arranging their own accommodation, rather than living in shared houses owned by their College.
- d. Two variants are shown for the degree of sharing that might exist: if it is assumed that on average 5 students share each house, then a total of 399 houses would be required, whereas if only 3.5 students share each house, then the number of houses required would rise to 569.
- e. It should be noted that these figures are for the numbers of students that had selected 'Other rented accommodation (shared with others on a temporary basis)' only, and do not include any that had selected 'Own permanent residence owned or rented by you'.
- f. Table 21 (overleaf) estimates the effect of including 'Own permanent residence owned or rented by you' on the overall need for PBSA.

5.37 The proportion of students selecting 'Own permanent residence owned or rented by you' and 'Other rented accommodation (shared with others on a temporary basis)' are:

- Undergraduates 6%.
- Postgraduates on one-year courses 15%.
- Postgraduates on courses of two or more years 41%.

5.38 The table below (Table 21) presents an estimate of the current potential for PBSA that, if built, would absorb all the University of Cambridge students currently living in shared houses in the city (including in this category both 'other rented' and 'own home'). The estimate is calculated by deducting from the total number of students:

- All those already living in PBSA.
- All those currently living in the parental home.
- All those for whom there is no information (1,008 students, or 8.5% of the total 11,815).

5.39 This would result in a requirement for 3,732 bed spaces to be provided in PBSA, which would allow the return of all houses currently occupied by students to the open market.

University of Cambridge: current baseline @ 2015/16								
	Total	University / College owned	Private halls	Other/not known	Parental home	Own home	Shared housing (student numbers)	Current potential for PBSA
Undergraduate	11815	10745	44	275	22	226	503	729
Postgraduate (1 year)	3102	2240	59	303	68	220	212	432
Postgraduate (2+ years)	6210	2890	241	430	78	1293	1278	2571
Total	21127	15875	344	1008	168	1739	1993	3732

Table 21: Current Potential for PBSA for the University of Cambridge

5.40 However, again, the numbers of students selecting 'Own permanent residence owned or rented by you' appears implausibly high. Students at the University of Cambridge are markedly younger than those at Anglia Ruskin University, and it appears unlikely that many are renting or owning their own independent accommodation. The table overleaf (Table 22) shows that the proportion of undergraduates at the University of Cambridge aged 25 or more is negligible compared to Anglia Ruskin University, and that the proportions of postgraduates aged 25 or more is half that of Anglia Ruskin University, while the proportion aged 30 or more is less than one third that of Anglia Ruskin University. The number of postgraduates in each case at the University of

Cambridge is much higher than Anglia Ruskin University, with 4,121 aged 25 or more and 1,239 aged 30 or more.

Full time students: % by age			
		Undergraduate	Postgraduate
ARU	>25	18%	61%
	>30	10%	31%
UoC	>25	1.30%	43%
	>30	0.50%	13%

Table 22: Age profile of students at Anglia Ruskin University and the University of Cambridge

5.41 This suggests that, in the case of the University of Cambridge, a much smaller allowance should be made for students genuinely living in 'Own permanent residence owned or rented by you' than that suggested above for Anglia Ruskin University.

5.42 The table below (Table 23) shows the consequences if an arbitrary estimate is made of the number of students living in their own independent accommodation.

University of Cambridge: current baseline @ 2015/16								
	Total	University / College owned	Private halls	Other/not known	Parental home	Own home	Shared housing (student numbers)	Current potential for PBSA
Undergraduate	11815	10745	44	275	22	100	629	629
Postgraduate (1 year)	3102	2240	59	303	68	100	332	332
Postgraduate (2+ years)	6210	2890	241	430	78	250	2321	2321
Total	21127	15875	344	1008	168	450	3282	3282

Table 23: Potential level of PBSA for the University of Cambridge with assumptions about a reduced level of independent accommodation and a higher proportion of shared housing

5.43 The 450 properties assumed to be owned or rented by students as their own independent homes would reduce the number of PBSA bed spaces required to 3,282, compared to the level of 3,732 in Table 20 above, which included 1,739 students who self-reported that they were living in 'Own permanent residence owned or rented by you'.

- 5.44 Only 20% of this level of PBSA is for undergraduates, where the level of PBSA of 629 rooms would represent an average of 22 rooms for each of the 29 undergraduate Colleges.
- 5.45 80% of the level of PBSA, 2,653 rooms, is for postgraduates. This represents an average of 86 rooms for each of the 31 Colleges with postgraduate students.
- 5.46 If the 3,282 PBSA rooms suggested in Table 23 were to be built, this would allow the return to the open market of between 656 houses at 5 students sharing in each house, and 938 houses at 3.5 students sharing in each house.

University of Cambridge expansion to 2026

- 5.47 The University's current planning framework envisages an expansion in undergraduate numbers of 0.5% each year for the next ten years, and in postgraduate numbers of 2% per year.
- 5.48 These targets for growth are aspirational, have not been achieved to date, and may not be achieved in the future, but the analysis that follows assumes that the expansion in both undergraduate and postgraduate student numbers does occur.
- 5.49 The table below (Table 24) shows the increase in the numbers of students that would result by 2026 if the University's planned growth was achieved, and if the categories of accommodation in private halls, other/not known, parental home and own home all grew in proportion to their current numbers. The balance of accommodation is then assumed to be provided either in shared housing or in additional PBSA.

University of Cambridge: increase in planned growth numbers to 2026								
	Total	University / College owned	Private halls	Other/not known	Parental home	Own home	Numbers of students in shared houses	Future potential for PBSA
Undergraduate	666	0	2	16	1	13	634	634
Postgraduate (1 year)	755	0	3	17	4	12	719	719
Postgraduate (2+ years)	1636	0	14	24	4	73	1521	1521
Total	3057	0	19	57	9	98	2874	2874

Table 24: Potential level of PBSA for the University of Cambridge with achievement of the planned growth in student numbers

- 5.50 The table suggests that around 3,000 additional student rooms would be required by 2026, if all the increases in numbers in own home and shared housing were to be accommodated in PBSA.
- 5.51 The level of PBSA for undergraduate rooms of 634 would represent an average of 22 rooms for each of the 29 undergraduate Colleges.

- 5.52 The level of rooms for postgraduates is much larger, at 2,240 rooms: an average of 72 rooms for each of the 31 postgraduate Colleges.
- 5.53 The level of PBSA illustrated is crucially dependent upon any University- or College-owned PBSA being competitive in location, quality and price with the non-university accommodation currently occupied by students in the city.
- 5.54 If none of the growth in student numbers to 2026 was accommodated in PBSA, then between 821 existing houses (at 3.5 students per house) and 656 existing houses (at 5 students per house) would be required to be converted to shared houses in order to meet the increased demand for shared housing in the city.

Overall current and future potential level of PBSA in university student accommodation

- 5.55 The table below (Table 25) summarises the current and future potential level of PBSA in student accommodation for the university sector.

Overall potential for PBSA in university student accommodation		
	Potential level of PBSA to house current students @ 2016	Potential additional level of PBSA to house growth in students @ 2026
Anglia Ruskin University	2803	
University of Cambridge	3282	2874
Total	6085	2874

Table 25: Overall level of PBSA in university student accommodation

- 5.56 Table 25 gives an estimated current level of PBSA of 6,085 bed spaces. This is the amount of PBSA that would be needed to accommodate all of the current students who are not housed by their educational institution or living in existing family housing.
- 5.57 Table 25 suggests that a total of 8,959 student rooms would need to be built in PBSA if the current and potential future levels of PBSA in student accommodation are to be met. This is the amount of PBSA that would be needed to accommodate all of the current and likely future students who are not housed by their educational institution or living in existing family housing.
- 5.58 Meeting the current level through PBSA might release between 1,200 houses (based on 5 students per shared house) and 1,700 houses (based on 3.5 students per shared house), currently occupied by students sharing, into the open market.
- 5.59 If PBSA is not available to meet future growth, then by 2026 between 656 (based on 5 students per shared house) and 821 (based on 3.5 students per shared house)

additional existing houses would need to be converted into shared student accommodation in order to meet demand.

- 5.60 As at 31 March 2016, there were 1,281 student bed spaces in the planning pipeline. Once completed, and provided they are occupied by students, this will reduce the current level in PBSA from 6,085 to 4,804, and reduce the future potential level from 8,959 student rooms to 7,678.
- 5.61 These estimates are dependent upon the assumptions spelt out above concerning the numbers of students actually occupying 'Own permanent residence owned or rented by you' and the average numbers of students actually occupying shared houses. The estimates are as robust as possible based on the available data.

6 Local authority review

- 6.1 This section discusses the findings from a review of planning policies relating to student housing in other local authorities.
- 6.2 The research conducted a review of the relevant planning policies adopted or proposed by local authorities that experience particular pressure from student numbers, to cover three areas of concern:
- a. How other local planning authorities have dealt with the accommodation needs of different institutions and their students, and whether their policies impose any restrictions on particular institutions or types of accommodation.
 - b. How other local planning authorities are addressing the guidance allowing the provision of student accommodation to be counted towards the housing requirement to the extent that it enables the release of existing housing back into the market.
 - c. How other local planning authorities have formulated any policies for the provision of affordable housing through student housing developments.
- 6.3 The review noted the size of the student population and key housing market indicators (e.g. house prices), to give a context for comparison with Cambridge. It looked at the status of the Local Plan to see the age of relevant policy and when it was adopted. The review searched for specific policy relating to student housing. In many cases, students were largely referred to in policy around HMO, so any HMO policy was also reviewed. The review searched for policy on the release of housing stock and how student housing was dealt with in any affordable housing or planning gain policy.
- 6.4 The findings are detailed in Appendix 3. They are summarised in Table 26 (see end of section). The review did not identify any consistent or robust policies for student housing in the other local authorities. Student housing is rarely tackled directly and often appears as an additional, separate policy or appendix, and is not a core part of the Strategic Housing Market Assessment (SHMA). The next section discusses the findings.

Discussion of review findings

- 6.5 The review considered how other local planning authorities have dealt with the accommodation needs of different institutions and their students, and whether their policies impose any restrictions on particular institutions or types of accommodation. It was very difficult in most cases to identify clear policies relating to the provision of student housing in any of the local authorities. Student housing is an issue around which policy has not kept pace with change.
- 6.6 The policy approach of some of the London boroughs with high student numbers were considered. There are four central London boroughs where 57% of provision for new student accommodation has been concentrated (Islington, Tower Hamlets, Southwark

and Camden).⁶ However, in some London boroughs (e.g. Haringey) there was no mention of students in policy.

- 6.7 There is uncertainty/confusion over whether student housing is part of the overall need/demand and supply of housing, or whether it is a function ancillary to the provision of education in the university/Higher Education (HE) sector of the economy.
- 6.8 Planning policies clearly vary in their recognition of the university/HE sector as a planning issue. In many cases, the existence of the university/HE sector is barely mentioned, either as a significant land use (typically in the city centre) or as a significant player in the local economy (in Leeds, for example, Leeds University is the third-largest employer, while Leeds Beckett University is the city's fourth-largest employer, but the Core Strategy has no policy directed towards the promotion or development of the sector). In other cases, such as Exeter and Lincoln, the role of the university/HE sector in local economic growth is explicitly recognised and promoted.
- 6.9 The review considered how other local planning authorities are addressing the guidance allowing the provision of student accommodation to be counted towards the housing requirement to the extent that it enables the release of existing housing back into the market. In most cases there was no mention of the release of stock back into the market; where it was mentioned, they had decided not to count it.
- 6.10 There is little evidence that PBSA has resulted in a release of former student-occupied HMO back into the housing market: most planning documents refer to 'relieving pressure' rather than to any substitution effect. In the Cambridge housing market, discussion with Anglia Ruskin University suggests that landlords are withdrawing properties from the student HMO market, refurbishing to higher standards, and re-letting as HMO into the 'professional' market (which may include postgraduate and postdoctoral tenants).
- 6.11 Student accommodation does not fit neatly into planning Use Classes: a purpose-built scheme might be in C2; a house occupied by a student who has two lodgers, or a two-bedroom flat with two students, would be in C3; a house occupied by four students would be in C4; and a house occupied by more than six students would be Sui Generis. We have drafted a matrix (Figure 12, page 72) that summarises where HMO are likely to fit within the Use Classes.
- 6.12 The most common area in which there is mention of student housing is in policy around HMO. Most local authorities have concerns about the impact of greater volumes of HMO and, in particular, concerns about the concentration of HMO in certain areas. Most local authorities want to actively manage the location of new HMO using Article 4 Directions.
- 6.13 There are clear differences in the role played by HMO in local housing markets. In some (Exeter) virtually all HMO are occupied by students, whereas in others (Leeds)

⁶ https://www.london.gov.uk/sites/default/files/the_london_plan_malp_march_2016_-_chapter_3_-_londons_people.pdf

HMO play an integral part in providing cheap accommodation within the wider housing market.

- 6.14 As a result, policy towards HMO varies widely, from highly restrictive (Reading), seeking to limit the proportion of HMO at the micro level, to accepting that high concentrations may have permanently altered the character of an area (Leeds) and that further HMO spread within those areas is acceptable. Leeds also operates an innovative policy allowing the conversion of a property from C3 to C4, and then back again, to reflect changing demand within the housing market.
- 6.15 There are related tensions around whether to allow/accept geographic concentrations of students (Leeds) or whether students should be dispersed across the whole residential market (Reading, Bath).
- 6.16 The support for PBSA varies but is generally the preference over the use of HMO in the private rented sector. However, even where PBSA is a favoured solution at the strategic level, restrictive policies at the development control level are common.
- 6.17 There is confusion over whether student accommodation is a subset of social housing (Bristol SHMA), or is a form of 'low cost' housing, or is provided by the market (whether by for-profit or not-for-profit providers).
- 6.18 There is only infrequent reference to postgraduate accommodation, and virtually no reference to postdoctoral accommodation, even though postgraduates are usually identified as the main area of growth in numbers.
- 6.19 The review considered how other local planning authorities have formulated any policies for the provision of affordable housing through student housing developments. It was in most cases unclear whether student housing attracts affordable housing contributions. This is in part because the Use Class Orders for student housing are often unclear. Most authorities in their affordable housing policy do not mention student housing development specifically. Community Infrastructure Levy (CIL) policies also vary. Some do not specifically mention student housing. The highest CIL rate for student accommodation was in Bath and North East Somerset Council, which charges schemes with market rents at £200/m² but zero-rates schemes with sub-market rents.
- 6.20 In summary, there appear to be few existing strong, coherent policy options in use by other local authorities that could be adopted by Cambridge City Council.

Planning Use Classes and HMO definitions	
	HMO status
C2 Residential institutions - Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres.	If shared facilities (such as cluster flats) then probably licensed HMO
<ul style="list-style-type: none"> • C3 Dwellinghouses - this class is formed of 3 parts: <ul style="list-style-type: none"> ◦ C3(a) covers use by a single person or a family (a couple whether married or not, a person related to one another with members of the family of one of the couple to be treated as members of the family of the other), an employer and certain domestic employees (such as an au pair, nanny, nurse, governess, servant, chauffeur, gardener, secretary and personal assistant), a carer and the person receiving the care and a foster parent and foster child. ◦ C3(b): up to six people living together as a single household and receiving care e.g. supported housing schemes such as those for people with learning disabilities or mental health problems. ◦ C3(c) allows for groups of people (up to six) living together as a single household. This allows for those groupings that do not fall within the C4 HMO definition, but which fell within the previous C3 use class, to be provided for i.e. a small religious community may fall into this section as could a homeowner who is living with a lodger. • C4 Houses in multiple occupation - small shared houses occupied by between three and six unrelated individuals, as their only or main residence, who share basic amenities such as a kitchen or bathroom. 	Resident landlord and up to two other persons who are not part of his or her household: not an HMO
	Not relevant
	Not relevant
	If five or more persons, forming more than one household, and three storeys or more, then licensed HMO, otherwise unlicensed HMO
Sui Generis	
Certain uses do not fall within any use class and are considered 'sui generis'. Such uses include: betting offices/shops, pay day loan shops, theatres, larger houses in multiple occupation, hostels providing no significant element of care, scrap yards. Petrol filling stations and shops selling and/or displaying motor vehicles. Retail warehouse clubs, nightclubs, launderettes, taxi businesses, amusement centres and casinos.	More than six unrelated individuals and no more than two storeys: unlicensed HMO. If three storeys or more, then licensed HMO
Planning Use Classes: https://www.planningportal.co.uk/info/200130/common_projects/9/change_of_use	
HMO definitions: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/15652/HMO_Lic_landlords_guide.pdf	

Figure 12: How Use Classes relate to HMO

Table 26: Summary of local authority review

Local Authority	Student housing policy	HMO	Release of stock	Affordable Housing	CIL
Bath and NE Somerset	<ul style="list-style-type: none"> • Hold number of HMO at 2011 levels • Deliver new on-campus accommodation • SHMA assumes to net increase in demand for student accommodation 	<ul style="list-style-type: none"> • SPD on HMO • Article 4 direction on HMO 	All student accommodation can be included in the housing requirement based on amount of accommodation it releases into market	Unclear whether it is applied to student accommodation	<p>Schemes with market rents - £200/m²</p> <p>Schemes with submarket rents - Nil</p>
Brighton and Hove	<ul style="list-style-type: none"> • Supports new purpose built accommodation • Actively manage location of new HMO 	<ul style="list-style-type: none"> • Limit on number of HMO concentrated in an area – restriction on new planning permissions • Article 4 direction on HMO 	N/A	Unclear whether it is applied to student accommodation	Not yet introduced
Cheshire West and Chester	<ul style="list-style-type: none"> • SPD on HMO and student accommodation • Prefers purpose-built accommodation to HMO • Student Stamp scheme 	<ul style="list-style-type: none"> • Limit on number of HMO concentrated in an area – restriction on new planning permissions • Article 4 direction on HMO 	N/A	Unclear whether it is applied to student accommodation	No specific reference to student accommodation
Durham County	<ul style="list-style-type: none"> • Residential Accommodation Strategy • Interim Policy on Student Accommodation 	<ul style="list-style-type: none"> • Limit on number of HMO concentrated in an area – restriction on new planning permissions • Article 4 direction on HMO 	N/A	Unclear whether it is applied to student accommodation	£150/m ² in draft charging schedule
Lincoln	<ul style="list-style-type: none"> • Supports new purpose built accommodation 	<ul style="list-style-type: none"> • Article 4 direction on HMO • Producing an SPD on HMO 	N/A	Unclear whether it is applied to student accommodation	No specific reference to student accommodation

Local Authority	Student housing policy	HMO	Release of stock	Affordable Housing	CIL
Exeter	<ul style="list-style-type: none"> 75% of student accommodation delivered should be purpose built in sustainable locations 	<ul style="list-style-type: none"> Article 4 direction on HMO 	N/A	Unclear whether it is applied to student accommodation	No specific reference to student accommodation
Nottingham	<ul style="list-style-type: none"> Supports new purpose-built accommodation Allocated sites City Centre and on campus Where it accords with approved SPD 	<ul style="list-style-type: none"> Limit on number of HMO concentrated in an area – restriction on new planning permissions Article 4 direction on HMO 	N/A	Commuted sum required on sites delivering student accommodation	No specific reference to student accommodation
Leeds	<ul style="list-style-type: none"> Supports new purpose-built accommodation with caveats 	<ul style="list-style-type: none"> Article 4 direction on HMO 	N/A	Unclear whether it is applied to student accommodation	No specific reference to student accommodation
Reading	<ul style="list-style-type: none"> No policy on students 	<ul style="list-style-type: none"> Restrictive policy on proportion of HMO Article 4 direction on HMO 	N/A	Unclear whether it is applied to student accommodation	No specific reference to student accommodation
Bristol	<ul style="list-style-type: none"> Supports new purpose built accommodation in appropriate locations No site allocations No growth in student numbers anticipated in SHMA 	<ul style="list-style-type: none"> Article 4 direction on HMO 	N/A	Some units would be covered by affordable housing requirements	£100/m ²
Camden	<ul style="list-style-type: none"> Expand student housing – target of 160 additional places in student housing per year Student housing – no net loss of two or more self-contained homes 	<ul style="list-style-type: none"> Aim for continued provision, support developments with caveats – no net loss of 	N/A	Applied if development is not robustly secured as student housing	No specific reference to student accommodation

Local Authority	Student housing policy	HMO	Release of stock	Affordable Housing	CIL
	<ul style="list-style-type: none"> Accessible to HE institutions in Camden or neighbouring boroughs 	two or more self-contained homes			
Islington	<ul style="list-style-type: none"> Student housing included in SHMA Developments will make annual payment, 2.4% of rental income, for student bursaries 	<ul style="list-style-type: none"> Mandatory licensing scheme 	N/A	Student housing to fulfil S106 requirements	<p>£400/m² for student accommodation</p> <p>£300/£250m² for residential dwellings (including C3 and C4).</p>
Southwark	<ul style="list-style-type: none"> Supports new developments that meet the Plan 	<ul style="list-style-type: none"> Supported where it meets local need Article 4 direction on HMO 	N/A	S106 requirements for student housing scheme of 30+ bed spaces or developments over 0.5 hectares	£100/m ² or restricted rents or avoided if universities are majority land owners

7 Policy discussion

- 7.1 The section above discussing the local authority policy review shows that there are few existing policy options in use by other local authorities that could be adopted by Cambridge City Council.
- 7.2 However, the research and review have highlighted some key issues that should be considered in relation to determining a policy for student housing. This section discusses the key policy issues on student housing that need to be considered.

The role of education institutions in the local economy

- 7.3 Education is one of the fundamental drivers of the Cambridge economy, particularly through the contribution made by the two universities, with the result that the support for this sector will include the expansion of existing institutions and the establishment of new ones as an economic priority. This suggests that the provision of student accommodation is a necessary feature of the city's development.
- 7.4 Student accommodation is a form of housing, rather than simply a function ancillary to education provision. Beyond the provision of an adequate number of bed spaces for students, student accommodation presents a broader issue of housing demand and the impact on local services and the local economy.
- 7.5 Student accommodation therefore needs to be adequately assessed as part of the overall planning process and in future revisions of the SHMA, and should be taken into account more transparently as part of the overall assessment of housing need.

The increasing diversity of students and their accommodation

- 7.6 However, what the research has made apparent is that students are very diverse both within and across different institutions, as are their housing needs. There is an undergraduate population of students who reside in Cambridge during term time and who are likely to want some form of institutionally provided accommodation. However, there is a large postgraduate population in Cambridge, some of whom will desire a more 'home-like' form of accommodation. The boundaries between different groups of students, and other sectors of the population such as post-doctoral researchers and contract researchers, are quite blurred in terms of their housing needs and current provision. Even a useful distinction between student accommodation only occupied by students during term time (mainly undergraduate and 14-19 year olds with other providers) and accommodation that is a student's permanent home, even if only for one academic year (mainly postgraduates), is not easy to make.

Making efficient use of student accommodation

- 7.7 There is also a diverse student population using the non-university education institutions in the city. As the research shows, many of these are accommodated in homestays, in existing accommodation facilities such as the University of Cambridge Colleges over the summer, and in some purpose-built accommodation. It is clear that

many of these students are only resident in the city outside of term time (e.g. students at summer schools).

- 7.8 This is an efficient use of existing student accommodation and helps to maintain the affordability of accommodation. It suggests that, if student accommodation is only occupied by a particular group of students during term time, then there should not be any restrictions on its use outside term (e.g. for summer school students, but also for conference delegates or for short-term holiday lettings).

The role of S106 and CIL in student accommodation

- 7.9 Few local authorities identified in the review consider new student accommodation development as a form of housing that requires a proportion to be delivered as affordable housing through S106. The review did raise the issue of whether there is a possible distinction to be made in policy terms between student accommodation provided by a not-for-profit provider and that provided by a for-profit provider (or between a profit-distributing provider and those who do not distribute any profit or surplus). The former could be exempt from or liable for a lower planning gain charge (e.g. through the CIL), and the latter could be liable for a higher planning gain charge. However, this would need to be a distinction based on viability information. Equally, a possible distinction could be made between student accommodation for direct let in the open market to any student (or any single person) and accommodation either directly owned (or leased) or to which an educational institution has nomination rights. Again, a differential planning gain charge could apply. 'Educational institution' could be defined as one registered with the appropriate regulatory body (such as HEFCE for higher education institutions, or the British Council for language schools).

The role of commercial providers of student accommodation

- 7.10 Policy 46 of the emerging Local Plan includes the requirement for student accommodation to meet the identified needs of an existing educational institution providing housing for students on full-time courses of an academic year or more. It expands the existing policy position, which restricts accommodation to the University of Cambridge and Anglia Ruskin University, to include other institutions.
- 7.11 However, the current policy situation has led to problems, primarily in tying the accommodation to particular institutions. This has occurred where new student accommodation is proposed and is in theory for students at Anglia Ruskin University, for example, but is not developed in discussion with Anglia Ruskin University, does not meet the affordability needs of these students, and is subsequently occupied by single people who may not be students or may be students of other institutions.
- 7.12 It seems a sensible policy position to require the proposed accommodation to be tied to a specific educational institution, or a group of institutions, through either a long-term lease or long-term nomination agreement.

- 7.13 The system seems to work well where the details of the development are specified in partnership with an education institution, and is further strengthened where applications are made jointly.
- 7.14 There needs to be a better understanding of the weaknesses of the current system of nomination arrangements, and of the weaknesses of enforcing S106 agreements around use of the accommodation, in order to make recommendations about how these may work better in the future.

Meeting the needs of the student population

- 7.15 The research shows that there is need for student accommodation, but that this sector of the population is diverse, and so new student housing would need to be clearly aimed at a particular type or group of students to demonstrate how it is meeting currently unmet need.
- 7.16 For example, speculatively developed PBSA that is delivered as studio flats is unlikely to be affordable for students studying at Anglia Ruskin University and will not necessarily meet the needs of the collegiate University of Cambridge; meanwhile, the proportion of students at other education institutions living in the private housing market is low. Therefore, it is not obvious from this analysis which sector of the student population such a development would serve. Some of the larger institutions may seek to acquire such developments, but could do so in conjunction with specific nomination rights. Studio flats are likely to also serve the market of postdoctoral researchers, contract researchers and other young professionals, but these are not student households and may have other needs in terms of facilities, such as car parking.

The location of student accommodation and its effect on neighbourhoods

- 7.17 The research and review of other local authorities highlight the policy issues that arise around the location of new student housing. Some local authorities have made the decision that the location of new student housing should be restricted, or constrained to particular areas of the city, rather than its location being solely determined by the market. This is largely enforced through Article 4 Directions and policy about change of use of properties to HMO, often in conjunction with use of a register of HMO. In Cambridge the education institutions are an important part of the local economy but their locations are broadly fixed. A policy that requires new student housing to be located near the education institutions, assuming a walk, cycle or perhaps bus ride, places a geographic boundary around where new student housing is suitable.
- 7.18 One policy option is to decide that the existing concentrations of student accommodation are ones that should be reinforced, as has been the case in some local authorities. The conversion to HMOs is therefore permitted in these areas and resisted in others through Article 4 Directions. Concentration of the student population already occurs within the University of Cambridge Colleges and enables them to provide infrastructure and services. A concentration of students in other areas would enable some degree of management and coherent service provision (e.g. enhanced

waste removal services, 'noisy party' patrols, or by allowing a wider range of ancillary services).

- 7.19 Where students are not accommodated in existing accommodation provided by educational institutions they will need to reside in either PBSA or HMO. There are political decisions to be made about the appropriate relationship between PBSA and the provision of student accommodation in existing housing stock.
- 7.20 If permission for new PBSA went alongside clear nomination agreements with educational institutions, and the agreements could be enforced, then the conversion of properties to HMO could be restricted, if the new developments are shown to be affordably meeting the needs of specific groups of students.
- 7.21 In terms of PBSA there are potential policy decisions around whether there should be a minimum size for PBSA developments (to avoid proliferation) or a maximum size (to avoid overconcentration). There is also the possibility that larger PBSA will be required to have onsite staff, although this raises issues of how any such requirement might be enforced (e.g. through S106).

PBSA and the release of housing stock

- 7.22 Decisions about the conversion of properties to HMO needs to be strategic and made in awareness of the risk of perverse incentives. For example, some Colleges have acquired properties contiguous to their estates but have not secured permission to convert them to large HMO. As a result, the properties are under-occupied.
- 7.23 The development of PBSA for students would not necessarily result in the release of all existing housing accommodation currently occupied by students back into the market. A small number of houses or flats will be owned by students (or their parents) and this pattern is likely to continue. A significant proportion of undergraduates at Anglia Ruskin University, and postgraduates at both universities, are aged over 25, and many of these are aged over 30: it is probable that many of these would prefer to rent, or possibly buy, their own accommodation in Cambridge.
- 7.24 Any development of PBSA is not guaranteed to release into the open market accommodation currently occupied by students, because there is no guarantee that the properties would not be purchased by private landlords and continue to operate as HMO.
- 7.25 Few mechanisms exist to prevent released property from being bought by an investor and let as an HMO to single professionals (or any other group of single people). As one example of a possible mechanism, the Council may wish to consider whether there is a housing role in acquiring property, possibly in a joint venture vehicle, which would then be let at market rents to single sharers such as contract research staff or other single professionals, thereby offering direct control over standards and allocation.

7.26 The analysis shows that there is a proportion of the student population currently living in the private market. The needs of some could be met by targeted provision of PBSA. The University of Cambridge Colleges would want any PBSA to be located close to their main sites and be specified to meet their individual needs, which may vary by College depending on their student and existing accommodation profile. The needs of some students at Anglia Ruskin University could be met by the development of PBSA that is close to the main site and is affordable to undergraduates and designed to meet their needs (e.g. cluster flats). There is some appetite amongst the non-university education institutions to secure further accommodation for use by their students.

Policy considerations

7.27 The total number of students in the city is over 45,000: 30,000 of these are in the two universities, and 10,000 of these are postgraduate students.

7.28 It is apparent that the number of students in the city is so large, and the universities in particular as well as the wider education sector are so central to the city's economy, that in future assessments of housing need they should be treated as part of the overall housing need profile.

7.29 Future housing need assessments will need to take account of the diversity of the student population and their different housing requirements. For example, for the majority of the 10,000 postgraduate students their accommodation is their year-round home, in most cases for up to four years, whereas postgraduate students on one-year courses are more likely to prefer PBSA.

7.30 Land allocation needs to balance the competing demands of the different groups within the city's overall housing market.

7.31 This report estimates that there is a need for some 6,000 rooms in new PBSA if existing housing stock shared by students is to be returned to the open housing market. There is an issue about the location of any new PBSA. There is a strong case for defining the areas in which new PBSA will be acceptable, rather than allowing speculative developments to become 'pepper potted' across the city. This would enable greater control over issues such as car parking.

7.32 This would not necessarily mean that permission for new HMO should be refused, because so many other groups are reliant on HMO for affordable housing in the city, whether their needs are driven by short-term employment in research and professional roles or by the need for cheaper accommodation. It should also be borne in mind that some students will always prefer to live in shared housing rather than PBSA.

7.33 One way to tackle the issue of planning for new PBSA would be to adopt a sequential test process. If need has been demonstrated and a zone designated for new PBSA, the first test is whether a proposed development is within the zone (and meets other policy requirements in relation to transport, design, etc.). Planning gain charges (e.g.

through S106) could be attached to proposals for any proposed development outside of the designated zone.

- 7.34 For proposed development of PBSA within the zone, the first test is whether it is directly related to a registered educational institution. The next issue to consider is whether it is being developed directly for the institution, and then whether this is for profit or not for profit. If it is being developed by a commercial operator it should be considered whether it is tied to a registered educational institution by a long-term lease or through clear long-term nomination rights. The final option would be that the proposal is being developed speculatively for the open market, in which case it could be considered whether these developments should be subject to planning gain charges (e.g. through S106).
- 7.35 The Council will need to make decisions about the extent to which the current and future student population should be housed in PBSA, rather than in shared housing in ordinary housing stock, and therefore which windfall sites should be granted permission and which sites should be allocated in the future for student housing.

8 Appendices

Appendix 1: Institutions contacted

Type of institution	Name of institution	Information through survey (or phone call)?
FE College	Abbey College Cambridge	Yes, telephone
FE College	Cambridge Seminars College	Yes, telephone
FE College	Bellerbys College Cambridge	Yes, online
FE College	St Andrews College	Yes, online
FE College	Cambridge Regional College	Yes, telephone
Independent sixth form college	Mander Portman Woodward	Yes, online
Independent sixth form college	CATS College Cambridge (Cambridge Education Group)	Yes, online
Independent sixth form college	Cambridge Centre for Sixth Form Studies	Yes, telephone
Language School	Bell Educational Services Ltd	Yes, online
Language School	Cambridge Academy of English	Yes, online
Language School	EC Cambridge	Yes, online
Language School	The New School of English	Yes, online
Language School	Language Studies International, Cambridge	Yes, telephone
Language School	Eurocentres Cambridge	Yes, online
Language School	Kaplan International Colleges Cambridge	Yes, online
Language School	Studio Cambridge English Language Courses	Yes, online
Language School	Stafford House	Yes, online
Language School	ABC Languages Cambridge	Yes, online
Language School	Cambridge Centre for Languages	Yes, online
Language School	Central Language School	Yes, telephone
Language School	EF	No response
Language School	Embassy English Cambridge	Yes, telephone
Language School	Regent Cambridge	Yes, online
Language School	Select English Cambridge	Yes, telephone
Language School	OISE Cambridge	Yes, online
Performing Arts College	Cambridge School of Visual and Performing Arts (Cambridge Education Group)	Yes, online
Performing Arts College	Bodywork	No response
Summer School	Reach Cambridge	Yes, online
Summer School	LITE Regal Education	Yes, online
Theological College	Institute for Orthodox Christian Studies	Yes, telephone
Theological College	Margaret Beaufort Institute of Theology	Yes, telephone
Theological College	Ridley Hall	No response
Theological College	Wesley House	Yes, online
Theological College	Westcott House	Yes, online
Theological College	Westminster College	Yes, online
Theological College	Wolf Institute	Yes, online
Theological College	Eastern Region Ministry Course	Yes, email
Summer School	Oxford & Cambridge Summer Academy	No response
Summer School	Advanced Studies Programme	Yes, telephone
Summer School	St Giles International	No response
Summer School	Oxford Study Courses	Yes, online
University	Anglia Ruskin University	Yes, online

Table 27: Institutions contacted for the research (excluding the University of Cambridge Colleges)

College	Response
Christ's	Yes
Churchill	Yes
Clare	Yes
Clare Hall	Yes
Corpus Christi	Yes
Darwin	Yes
Downing	Yes
Emmanuel	Yes
Fitzwilliam	Yes
Girton	Yes
Gonville and Caius	Yes
Homerton	Yes
Hughes Hall	Yes
Jesus	Yes
King's	Yes
Lucy Cavendish	Yes
Magdalene	Yes
Murray Edwards	Yes
Newnham	Yes
Pembroke	Yes
Peterhouse	Yes
Queens'	Yes
Selwyn	Yes
Sidney Sussex	Yes
St Catharine's	Yes
St Edmund's	Yes
St John's	Yes
Wolfson	Yes
Robinson	No
Trinity	No
Trinity Hall	No

Table 28: University of Cambridge Colleges contacted for the research

Appendix 2: Online surveys

8.1 This Appendix contains the two online surveys. One was completed by the non-university institutions and Anglia Ruskin University, and one by the University of Cambridge Colleges. It was an online survey and respondents would not have seen every question; filtering in the survey would ensure they only saw relevant questions based on their responses. The online formatting of the survey is not displayed below, but the questions are included for reference.

Survey completed by Anglia Ruskin University and the non-university institutions

Q1 The City Councils of Cambridge and Oxford have commissioned this survey in order to understand the current numbers, and types, of students requiring accommodation in the two cities, and the plans of institutions for future development or expansion.

Your answers will help the two Councils in their preparation of Local Plans and planning guidance for the future.

The survey has been sent to every educational institution in both cities, and therefore not all the questions will necessarily be relevant to your institution. Please skip these as necessary.

We recognise that not all institutions will collect data on every topic in the survey: some of the questions ask for your best estimate (or guesstimate) where this is possible.

If you have any questions about the survey please contact Dr Gemma Burgess on 01223 764547 or glb36@cam.ac.uk.

Q27 Please confirm the name of your institution or College, its address for correspondence, and its postcode in the boxes below:

Name of institution or College (1)

Address for correspondence (2)

Postcode (3)

Q29 Please give your contact details in the boxes below:

Name (1)

Email (2)

Direct phone number (3)

Q30 Are you part of any of the following?

University of Cambridge (2)

Anglia Ruskin University (3)

University of Oxford (4)

Oxford Brookes University (5)

Other educational institution e.g. language school, independent sixth form college (please specify what type of institution). (6) _____

If University of Cambridge Is Selected, Then Skip To End of Block If Anglia Ruskin University Is Selected, Then Skip To End of Block If University of Oxford Is Selected, Then Skip To End of Block If Oxford Brookes University Is Selected, Then Skip To End of Block

Q31 In which year did your institution first begin operations in Cambridge or Oxford? (Please write in the box below.)

Q39 Does your institution impose any restriction on where your students can live during term time?

- Yes (1)
 No (3)

Display This Question:

If Does your institution impose any restriction on where your students can live during term time? Yes Is Selected

Q40 Please describe the policy on where your students can live during term time.

Q43 Information on students.

The following questions are about the numbers and types of students at your institution.

Q2 What is the maximum number of students likely to be attending your institution or College at any one time during the year, including short courses?

Q42 How many of these students are on courses that run for at least one academic year?

Q3 When are your courses run? Please tick as many as apply.

- During term time (1)
 During the holiday periods (2)
 All year round (3)
 Other (please write in) (4) _____

Q14 How many students are attending in any of these categories, and are they full time or part time?

	Full-time students (1)	Part-time students (2)
Postgraduate taught or research courses (1)		
Undergraduate degree or diploma courses (2)		
Foundation year courses (3)		
Preparation for university courses (4)		
'A' level or IB courses (5)		
GCSE or similar courses (6)		
Language courses (7)		
Other (Please specify) (8)		

Q7 What is the general age range of students on the various types of course? Please tick as many age ranges as apply.

	Under 16 (5)	16-18 (4)	18-21 (3)	21-24 (2)	Over 24 (1)
Postgraduate taught or research courses (1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Undergraduate degree or diploma courses (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Foundation year courses (3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preparation for university courses (4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
'A' level or IB courses (5)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GCSE or similar courses (6)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Language courses (7)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Please specify) (8)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q23 Do you have any information on how many of your students were residents of the city before becoming a student (and who therefore probably have a family home in the city)?

- Yes, I estimate that the number is (1) _____
- No, but I know that some students have their family home in the city (2)
- No, virtually all of our students come to the city from elsewhere (3)
- Don't know (4)

Q5 Do you have any information on how many students are married or have a long-term partner (and therefore might need appropriate accommodation)?

- Yes: I estimate that the number is (1) _____
- No, but I know that some are married or have a long term partner (2)
- No, our students are not at that age (3)
- Don't know (4)

Q8 Do you have any information on how many students have a child or children (and therefore might need appropriate accommodation)?

- Yes: I estimate that the number is (1) _____
- No, but I know that some do have children (2)
- No, our students are not at that age (3)
- Don't know (4)

Q9 Do you know whether any of your students live outside the city boundary and commute into the city for classes or other educational activities?

- Yes: I estimate that the number is (1) _____
- No, but I know that some do commute into town (2)
- No, all our students are accommodated in the city (3)
- Don't know (4)

Q10 Do you know whether any of your students live inside the city boundary but commute elsewhere for classes or other educational activities?

- Yes: I estimate that the number is (1) _____
- No, but I know that some do commute outside the city (2)
- No, all our students are educated in the city (3)
- Don't know (4)

Q11 Student accommodation

The next group of questions is about how your students are accommodated.

Q15 How many students are you able to accommodate in purpose-built (or converted) buildings owned (or long-term leased) by your institution?

Q17 How many students are you able to accommodate in purpose-built (or converted) buildings rented (or short-term leased) by your institution?

Q18 Does your institution rent (or short-term lease) ordinary housing stock from private owners to use as student accommodation?

- Yes (4)
- No (5)

If No Is Selected, Then Skip To Do you have any formal nomination agr...

Q34 How many houses and flats does your institution rent to use as student accommodation?

Q35 How many students are accommodated in the houses and flats rented by your institution?

Q19 Do you have any formal nomination agreements with landlords which allow you to nominate students to vacancies?

- Yes (23)
- No (24)

If No Is Selected, Then Skip To Do you have any informal arrangements...

Q36 How many students are accommodated through nomination agreements with landlords?

Q20 Do you have any informal arrangements with landlords or private families who regularly provide accommodation for your students? (Please do not include 'homestay' students, who are counted in the next question.)

- Yes (1)
 No (2)

If No Is Selected, Then Skip To Do you offer 'homestay' style accommo...

Q37 How many students are accommodated through informal arrangements with landlords or private families?

Q28 Do you offer 'homestay' style accommodation for any of your students?

- Yes (1)
 No (2)

If No Is Selected, Then Skip To Taking all the above ways of providin...

Q38 How many students are in 'homestay'-style accommodation?

Q4 Taking all the above ways of providing accommodation for your students, how many of these students are accommodated in each of the following types of accommodation?

	Self-contained studio flats (1)	En suite bedrooms (2)	Bedrooms with shared facilities (3)	Shared or dormitory type rooms (4)
Postgraduate taught or research courses (1)				
Undergraduate degree or diploma courses (2)				
Foundation year courses (3)				
Preparation for university courses (4)				
'A' level or IB courses (5)				
GCSE or similar courses (6)				
Language courses (7)				
Other (Please specify) (8)				

Q21 Do you have any other ways in which you provide accommodation for your students?

- Yes (1)
- No, but we have an accommodation service which liaises with letting agents and private landlords (2)
- No: it is up to students to make their own arrangements (3)

Display This Question:

If Do you have any other ways in which you provide accommodation for your students?

Yes Is Selected

Or Do you have any other ways in which you provide accommodation for your students?

Is Selected

Q41 Please describe these arrangements.

Q22 Overall, how many students make their own arrangements to find somewhere to live, even if this is done through your accommodation service?

My best estimate of the number is: (1)

Q13 Development and expansion

The last group of questions is about your institution's plans for future development or expansion.

Q12 Over the next five years (2017-2021), does your institution expect to:

- Expand its activities in the city (1)
- Stay the same size (2)
- Reduce its activities in the city (3)

If Stay the same size Is Selected, Then Skip To Have your plans for the next five yea...If

Reduce its activities in th... Is Selected, Then Skip To Have your plans for the next five yea...

Q26 Over the next five to ten years, what average % annual rate of expansion are you anticipating for any of the following types of courses? Please leave blank if not applicable

	% increase (1)
Postgraduate taught or research courses (1)	
Undergraduate degree or diploma courses (2)	
Foundation year courses (3)	
Preparation for university courses (4)	
'A' level or IB courses (5)	
GCSE or similar courses (6)	
Language courses (7)	
Other (please specify) (8)	

Q24 Have your plans for the next five years been influenced by the outcome of the referendum on EU membership?

- Yes, we are more cautious and have put plans on hold (1)
- Yes, but although things are uncertain, we are continuing with our plans (for the moment) (2)
- Not really - we think that there is a continuing demand for our business (3)
- Actually, we see Brexit as an opportunity for us to expand our business (4)

Q25 In five to ten years' time, what proportion of your total student accommodation do you think will be provided in the following ways:

- _____ Purpose built (or converted) on our main site (1)
- _____ Purpose built (or converted) on sites elsewhere in the city, but owned by us (2)
- _____ Purpose built (or converted) on sites elsewhere in the city, but owned by others (3)
- _____ Increased use of leasing or other similar arrangements with private landlords (4)
- _____ The balance of students will continue to have to find their own accommodation (5)

Q26 Do you see an increasing or decreasing demand for the following types of accommodation over the next five to ten years?

	Self contained studio flats (1)	Ensuite bedrooms (2)	Bedrooms with shared facilities (3)	Shared or dormitory type rooms (4)
Increasing demand (1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Same demand as at present (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decreasing demand (3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q33 Are there any other issues in relation to future developments in your business which you feel would be relevant to this survey? If so, please write your comments in the box below.

Q32 Thank you for completing the survey.

We may contact you if there are further queries on your future plans.

Survey completed by the University of Cambridge Colleges

Q1 The City Councils of Cambridge and Oxford have commissioned this survey in order to understand the current numbers, and types, of students requiring accommodation in the two cities, and the plans of institutions for future development or expansion.

Your answers will help the two Councils in their preparation of Local Plans and planning guidance for the future. The data may also be shared with the University's Office of Intercollegiate Services.

We recognise that you may not collect data on every topic in the survey: some of the questions ask for your best estimate (or guesstimate) where this is possible.

If you have any questions about the survey please contact Dr Gemma Burgess on 01223 764547 or glb36@cam.ac.uk.

Q27 Please confirm the name of your College:

College (1)

Q29 Please give your contact details in the boxes below:

Name (1)

Email (2)

Direct phone number (3)

Q43 Information on students

We have already collected centrally held data on the number of students at your College. The following are more general questions about your students.

Q23 Do you have any information on how many of your students were residents of the city before becoming a student (and who therefore probably have a family home in the city)?

- Yes, I estimate that the number is (1) _____
- No, but I know that some students have their family home in the city (2)
- No, virtually all of our students come to the city from elsewhere (3)
- Don't know (4)

Q5 Do you have any information on how many students are married or have a long-term partner (and therefore might need appropriate accommodation)?

- Yes: I estimate that the number is (1) _____
- No, but I know that some are married or have a long term partner (2)
- Don't know (4)

Q8 Do you have any information on how many students have a child or children (and therefore might need appropriate accommodation)?

- Yes: I estimate that the number is (1) _____
- No, but I know that some do have children (2)
- Don't know (4)

Q9 Do you know whether any of your students live outside the city boundary and commute into the city for classes or other educational activities?

- Yes: I estimate that the number is (1) _____
- No, but I know that some do commute into town (2)
- No, all our students are accommodated in the city (3)
- Don't know (4)

Q10 Do you know whether any of your students live inside the city boundary but commute elsewhere for classes or other educational activities (such as the Mullard Radio Astronomy Observatory or Papworth Hospital)?

- Yes: I estimate that the number is (1) _____
- No, but I know that some do commute outside the city (2)
- No, all our students are educated in the city (3)
- Don't know (4)

Q11 Student accommodation

The next group of questions is about how your students are accommodated.

Q15 How many students are you able to accommodate in purpose-built (or converted) buildings owned (or long-term leased) by your College?

Q17 How many students are you able to accommodate in purpose-built (or converted) buildings rented (or short-term leased) by your College?

Q18 Does your College rent (or short-term lease) ordinary housing stock from private owners to use as student accommodation?

- Yes (4)
- No (5)

If No Is Selected, Then Skip To Do you have any formal nomination agr...

Q34 How many houses and flats does your College rent to use as student accommodation?

Q35 How many students are accommodated in the houses and flats rented by your College?

Q19 Do you have any formal nomination agreements with landlords which allow you to nominate students to vacancies?

- Yes (23)
- No (24)

If No Is Selected, Then Skip To Do you have any informal arrangements...

Q36 How many students are accommodated through nomination agreements with landlords?

Q20 Do you have any informal arrangements with landlords or private families who regularly provide accommodation for your students?

- Yes (1)
- No (2)

If No Is Selected, Then Skip To Taking all the above ways of providin...

Q37 How many students are accommodated through informal arrangements with landlords or private families?

Q4 Taking all the above ways of providing accommodation for your students, how many of these students are accommodated in each of the following types of accommodation?

	Self-contained studio flats (1)	En suite bedrooms (2)	Bedrooms with shared facilities (3)
Postgraduate taught or research courses (1)			
Undergraduate degree courses (2)			

Q22 Overall, how many students make their own arrangements to find somewhere to live?
My best estimate of the number is: (1)

Q13 Development and expansion

The last group of questions is about your College's plans for future development or expansion

Q26 Over the next five to ten years, what average % annual rate of expansion in student numbers are you anticipating for any of the following types of courses? Please leave blank if not applicable

	% increase (1)
Postgraduate taught or research courses (1)	
Undergraduate degree courses (2)	

Q24 Have your plans for the next five years been influenced by the outcome of the referendum on EU membership?

- Yes, we are more cautious and have put plans on hold (1)
- Yes, but although things are uncertain, we are continuing with our plans (for the moment) (2)
- Not really - we think that there will be a continuing demand in the future (3)
- Actually, we see Brexit as an opportunity to expand our provision (4)

Q25 In five to ten years' time, what proportion of your total student accommodation do you think will be provided in the following ways:

- _____ Purpose built (or converted) on our main site (1)
- _____ Purpose built (or converted) on sites elsewhere in the city, but owned by us (2)
- _____ Purpose built (or converted) on sites elsewhere in the city, but owned by others (3)
- _____ Increased use of leasing or other similar arrangements with private landlords (4)
- _____ The balance of students will continue to have to find their own accommodation (5)

Q26 Do you see an increasing or decreasing demand for the following types of accommodation over the next five to ten years?

	Self-contained studio flats (1)	En suite bedrooms (2)	Bedrooms with shared facilities (3)
Increasing demand (1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Same demand as at present (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decreasing demand (3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q33 Are there any other issues in relation to future developments in your College which you feel would be relevant to this survey? If so, please write your comments in the box below.

Q32 Thank you for completing the survey.

We may contact you if there are further queries on your future plans.

Appendix 3: Local authority review

Bath and North East Somerset Council

Student population

- 8.2 Bath has two universities. The University of Bath has expanded during the last 20 years. For the 2013/14 academic year total enrolment was 15,660, up from 6,776 in 1994/95. The number of students enrolled at Bath Spa University has also been increasing. For the 2012/13 academic year there were a total of 7,865 students. Of these, 5,930 (75%) were studying on full-time courses. The long-term compound annual growth rate has been about 6%, but for the last 5 years it has been 1% and for the last 3 years -3.7%.⁷
- 8.3 Not all students that are enrolled are present and living within the city during term time. Further, of those that are present, not all are in need of managed or other shared accommodation. Out of a total dwelling stock of 39,000 in 2011, it is estimated that 2,833 were occupied as student HMO (7%), housing about 11,300 students.⁸

Housing market

- 8.4 To put the current housing market in context, last year most property sales in Bath involved flats, which sold for on average £330,554. Terraced properties sold for an average price of £439,375, while semi-detached properties fetched £415,774. During the last year, sold prices in Bath were 12% up on the previous year and 22% up on 2013 when the average house price was £347,915.⁹

Local Plan

- 8.5 The Local Plan was adopted on 18 October 2007.¹⁰ The Core Strategy for Bath and North East Somerset Council was formally adopted by the Council on 10 July 2014. It now forms part of the Development Plan for the District (see below) and will be used in the determination of all planning applications submitted to the Council alongside policies in the Joint Waste Core Strategy (2011) and those saved policies in the Local Plan (2007) not replaced by the Core Strategy.

Policy on student housing

- 8.6 In terms of published policy on student housing, the long-term planning strategy is to hold the number of HMO at 2011 levels and increase the overall housing stock of the city to 46,000 by 2029. That will mean student HMO will account for 6% of the stock, a small net reduction.¹¹ The universities' housing needs are forecast to grow by 3,200 by

⁷ http://www.bathnes.gov.uk/sites/default/files/sitedocuments/Planning-and-Building-Control/Planning-Policy/CIL/cil_student_numbers_and_accommodation.pdf

⁸ Bath and North East Somerset Local Plan - Student Numbers and Accommodation Requirements 2011-2029 (Part of the Strategic Housing Market Assessment) August 2014

⁹ <http://www.rightmove.co.uk/house-prices/Bath.html>

¹⁰ <http://www.bathnes.gov.uk/services/planning-and-building-control/planning-policy/local-plan>

¹¹ http://www.bathnes.gov.uk/sites/default/files/sitedocuments/Planning-and-Building-Control/Planning-Policy/CIL/cil_student_numbers_and_accommodation.pdf

2021 and stabilise thereafter to 2029. To keep the number of HMO at 2011 levels, new dedicated accommodation will need to be provided. The strategy is to achieve this mainly on campus, with supplementary off-campus provision being allowed where appropriate. The strategy is not to reduce the actual number of HMO, because of the consequences for land supply for other uses. The majority of undergraduates 'demand' an HMO living experience after their first year of study. There is therefore only so much 'institutional' accommodation (public or private, on- or off-campus) that will be demanded/consumed – if HMO are available.

- 8.7 The specific policy is: in Core Strategy Extracts Policy B1(7a) to “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”.
- 8.8 Policy B5 re. Off-Campus Student Accommodation states that “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”.¹²

HMOs

- 8.9 There appear to be no further specific restrictions on student housing. However, the Council has decided to use its rights to exert greater planning controls in relation to HMO in Bath.¹³
- 8.10 The Houses in Multiple Occupation in Bath Supplementary Planning Document (SPD) sets out Bath and North East Somerset Council’s approach to the distribution and dispersal of HMO. This followed the Council’s implementation of an Article 4 Direction in relation to Houses of Multiple Occupation in the City of Bath.
- 8.11 There are more than 3,000 known HMO in the district, most of which are in Bath. The SPD is aimed at facilitating a sustainable community in Bath by encouraging a wide variety of households in all areas. It also seeks to improve the standard, safety and management of HMO across the district. Planning permission is likely to be refused in neighbourhoods with over 25% of the existing housing stock in use as HMO.
- 8.12 Some HMO with shared facilities must also be licensed; this is to ensure that minimum standards of safety, welfare and management are maintained. Landlords and managers of HMO across Bath and North East Somerset may need to apply for a mandatory licence, whilst those in Bath may also need to apply for an additional licence.

¹² http://www.bathnes.gov.uk/sites/default/files/sitedocuments/Planning-and-Building-Control/Planning-Policy/CIL/cil_student_numbers_and_accommodation.pdf

¹³ <http://www.bathnes.gov.uk/services/planning-and-building-control/planning-policy/houses-multiple-occupation-bath-article-4-dir>

Approach to release of stock

- 8.13 The Council has considered that all student accommodation can be included in the housing requirement based on the amount of accommodation it releases in the housing market.¹⁴ 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 (ibid.).
- 8.14 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% per annum, and all the accommodation plans are realised, then students should not add to housing pressures over the plan period, and between 250 and 575 HMO could be released from student use and returned to the general housing market. However, it has not relied on any such releases as a contribution to supply. 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 (ibid.).

Planning gain policy – S106/CIL

- 8.15 The Community Infrastructure Levy rates for student accommodation are as follows:
- Schemes with market rents £200/m²
 - Schemes with submarket rents (student accommodation units which are to be let at a rent which is no more than 80% of the local market rent (including any service charges) to be set in Section 106 planning agreement Nil¹⁵
- 8.16 It is not clear if affordable housing contributions are sought for student accommodation. The published SPD only mentions the size of sites and their contribution, not the type of development.

¹⁴ See Appendix 2 Paragraphs 54-65 of the Core Strategy Inspector's Report.

http://www.bathnes.gov.uk/sites/default/files/sitedocuments/Planning-and-Building-Control/Planning-Policy/CIL/cil_student_numbers_and_accommodation.pdf

¹⁵ http://www.bathnes.gov.uk/sites/default/files/sitedocuments/Planning-and-Building-Control/Planning-Policy/CIL/bnes_charging_schedule.pdf

http://www.bathnes.gov.uk/sites/default/files/sitedocuments/Planning-and-Building-Control/Planning-Policy/SPDs/planning_obligations_spd.pdf

8.17 Large sites – Affordable housing will be required as on-site provision in developments of 10 dwellings or 0.5 hectare and above (the lower threshold applies). The following percentage targets will be sought:

- 40% in Prime Bath, Bath North and East, Bath Rural Hinterland.
- 30% in Bath North and West, Bath South, Keynsham and Saltford, Midsomer Norton, Westfield, Radstock, Peasedown St John, Paulton and Chew Valley. This is on a grant free basis with the presumption that on site provision is expected.

8.18 Small sites – Residential developments on small sites from 5 to 9 dwellings or from 0.25 up to 0.49 hectare (the lower threshold applies) should provide either on-site provision or an appropriate financial contribution towards the provision of affordable housing with commuted sum calculations. The target level of affordable housing for these small sites will be 20% for AH area 1 and 15% for AH area 2, half that of large sites, in order to encourage delivery.

Brighton and Hove City Council

Student population

- 8.19 There are approximately 35,200 students at the Universities of Brighton and Sussex, which includes 4,000 students from non-EU countries. Many students also attend other educational establishments, such as City College, the language schools and Brighton Institute of Modern Music.¹⁶
- 8.20 Brighton and Hove City Council's 'Student Housing Strategy 2009-2014' identified a number of key issues associated with the large student population that need to be addressed in partnership with the city's two universities, other educational establishments, students, landlords and developers. The Strategy sets out several objectives, one of which is to promote and enable the appropriate development of PBSA at suitable locations within the city.

Housing market

- 8.21 To put the current housing market in context, last year most property sales in Brighton involved flats, which sold for on average £268,402. Terraced properties sold for an average price of £456,265, while semi-detached properties fetched £389,410. During the last year, sold prices in Brighton were 9% up on the previous year and 27% up on 2013 when the average house price was £291,736.¹⁷
- 8.22 As stated in the City Plan Part One (March 2016, page 219, paragraph 4.218), in the period 1997–2007 average house prices in Brighton and Hove almost tripled. Although there has been some decrease in house prices since their peak in 2007, prices remain relatively high in relation to local incomes. 2012 house price data suggests that a 1-bedroom flat would be unaffordable to those households with average household incomes. To purchase an average-priced 1-bedroom flat in the city would require an annual household income of around £40,000. To purchase an average-priced 3-bedroom house would require a household income of approximately £72,500.

Local Plan

- 8.23 The City Plan Part One was adopted March 2016; the Brighton and Hove Local Plan was adopted 2005.¹⁸

¹⁶ http://www.brighton-hove.gov.uk/sites/brighton-hove.gov.uk/files/FINAL%20version%20cityplan%20March%202016compreswith%20forward_0.pdf

¹⁷ <http://www.rightmove.co.uk/house-prices/Brighton.html>

¹⁸ <http://www.brighton-hove.gov.uk/content/planning/planning-policy/development-plans>

Policy on student housing

- 8.24 As stated in the City Plan Part One: CP21 Student Housing and HMO (March 2016, page 223, Restrictions on student housing), to meet increasing accommodation demands from students and to create mixed, healthy and inclusive communities, the Council will support the provision of additional purpose-built accommodation and actively manage the location of new HMO.
- 8.25 Proposals for new PBSA will need to demonstrate that the following criteria have been addressed:
- a. Proposals should demonstrate that there will be no unacceptable impact upon residential amenity in the surrounding area through issues such as increased noise and disturbance.
 - b. High-density developments will be encouraged but only in locations where they are compatible with the existing townscape (see CP12 Urban Design).
 - c. Sites should be located along sustainable transport corridors where accommodation is easily accessible to the university campuses or other educational establishments by walking, cycling and existing or proposed bus routes.
 - d. Proposals should demonstrate that they would not lead to an unacceptable increase in on-street parking in the surrounding area.
 - e. Proposals should be designed to be safe and secure for their occupants whilst respecting the character and permeability of the surrounding area.
 - f. Schemes should demonstrate that they have entered into a formal agreement with one of the city's two universities or other existing educational establishments within Brighton and Hove. The Council will seek appropriate controls to ensure that approved schemes are occupied solely as student accommodation and managed effectively.
 - g. Permanent PBSA will not be supported on sites allocated for housing or with either an extant planning permission for residential development or sites identified as potential housing sites.
- 8.26 4.230 of the City Plan Part One states that in recent years the City Council has received an increasing number of speculative enquiries from developers regarding PBSA. Assessing proposals for new purpose-built accommodation against the above criteria will ensure that schemes are developed to a high standard and in appropriate locations that meet council, residents', students' and educational institutions' priorities.

HMO

- 8.27 In order to support mixed and balanced communities and to ensure that a range of housing needs continue to be accommodated throughout the city, applications for new-build HMO, and applications for the change of use to a Class C4 (HMO) use, a

mixed C3/C4 use or to a sui generis HMO use (more than six people sharing) will not be permitted where more than 10% of dwellings within a radius of 50m of the application site are already in use as Class C4, mixed C3/C4 or other types of HMO in a sui generis use.

- 8.28 In 2010 a new C4 use class for HMO was created. The Council already had concerns about the overconcentration of HMO in certain parts of Brighton and Hove, as expressed through the Student Housing Strategy, and felt that these areas had the exceptional circumstances necessary to warrant an Article 4 Direction. An Article 4 Direction was subsequently made, meaning that planning permission is required for changes of use to small HMO (C4) uses in five of the city's electoral wards.
- 8.29 This policy will be used to control future changes of use to small (C4), mixed C3/C4 uses and large (sui generis) HMO to address the potential impact of concentrations of HMO upon their surroundings and to ensure that healthy and inclusive communities are maintained across the city.
- 8.30 To aid implementation of this policy, the Council will maintain a database of properties in HMO use. It will include properties in small HMO (C4) use, mixed C3/C4 uses and larger, sui generis HMO uses. The database will use a variety of information sources including planning records, details of HMO licensed by the Council and those properties identified as student housing through Council Tax records (City Plan Part One, page 226, paragraphs 4.234-4.236).

Approach to release of stock

- 8.31 There is no mention of any policy regarding the release of stock back into the general market.

Planning gain policy – S106/CIL

- 8.32 Currently, there is no timetable for the City Council to introduce CIL.
- 8.33 It is not clear if affordable housing contributions are sought for student accommodation. The published Plan only mentions the size of sites and their contribution, not the type of development.
- 8.34 Drawing on the findings of the council's most recent Affordable Housing Development Viability Study and taking account of a number of considerations (for example, the city's housing land supply, housing market trends, local needs and affordability, together with wider planning obligations), the Council will aim to achieve onsite provision of affordable housing on all suitable larger development sites (40% on sites of 15 units or more and, where practicable, 30% on sites of between 10 and 14 units) and a financial contribution equivalent to a lower target quota of 20% on smaller development sites of between 5 and 9 units (City Plan Part One, page 22, paragraph 4.222).

Cheshire West and Chester Council

Student population

8.35 Chester has a population of 120,622, of which 17,000 are students.

Housing market

8.36 To put the current housing market in context, last year, most residential property sales were for terraced properties, which sold for an average of £177,809, while semi-detached properties sold for an average of £209,561 and detached properties fetched £350,669. House prices have been similar for the past two years, but are 6% higher than in 2013.¹⁹

Local Plan

8.37 The Local Plan Part One was adopted on 29 January 2015.²⁰ Two draft Supplementary Planning Documents (SPDs) were produced on Travel Planning Guidance and Houses in Multiple Occupation and Student Accommodation; comments on these were invited between November 2015 and January 2016 and they were amended to incorporate the comments received. Both SPDs were adopted by the Council and are now material considerations in decisions on planning applications.

Policy on student housing

8.38 As stated in the Chester City Local Plan (2006, policy HO17), the Council deems that PBSA would be a more acceptable means of providing accommodation for students than the conversion of existing dwellings (or HMO).

8.39 The SPD Houses in Multiple Occupation and Student Accommodation (April 2016)²¹ outlines the criteria that proposals for new PBSA would need to address:

- a. Development will be restricted to locations within the existing built-up urban area and the use of previously developed land or buildings will be supported.
- b. Development must be within reasonable walking distance of university/college campuses or in other locations with good accessibility by cycle routes or public transport.
- c. The layout, appearance, scale, height and massing of new development must respect its setting and not unacceptably harm the character of the surrounding area.
- d. Development must not unacceptably harm the amenity of surrounding residents, taking into account cumulative impacts when considered with existing or planned student housing provision in the locality.

¹⁹ <http://www.rightmove.co.uk/house-prices/Chester.html>

²⁰ http://www.cheshirewestandchester.gov.uk/your_council/policies_and_performance/council_plans_and_strategies/planning_policy/local_plan.aspx

²¹ <http://consult.cheshirewestandchester.gov.uk/file/3934141>

- e. It must be demonstrated through an appropriate management plan that any potential negative impacts arising from the occupation of the development on the surrounding area can be acceptably mitigated, and that a positive and safe living environment for students and residents in the surrounding area can be created.
- f. Development must reflect high-quality architectural design and sustainable construction.

8.40 The SPD Houses in Multiple Occupation and Student Accommodation (April 2016) further outlines the 'student stamp scheme' for existing student accommodation. Under this scheme, the Council inspects the existing property and accredits the property as suitable for advertisement on the University Student Accommodation List; this reassures prospective tenants that the property meets the required standards and landlords can advertise their property via the University.

HMO

8.41 To support balanced communities, and encourage the accommodation of students in specialist properties, planning permission will be required in specific areas to change the use of a dwelling to a HMO. Planning permission will not usually be granted for a new HMO in areas where more than 15% of residential properties are already HMO. The area where Article 4 applies already has the highest concentration of HMO due to its proximity to the University.

8.42 The Chester City Local Plan (2006) highlights that planning permission to convert the use of a property to a HMO will be refused if the additional HMO would negatively affect the local environment. Further, the new HMO would need to meet minimum size criteria, have the support of the University to house students and not lead to a loss of family dwellings in the area.

Approach to release of stock

8.43 There is no mention of any policy regarding the release of stock back into the general market.

Planning gain policy – S106/CIL

8.44 Cheshire West and Chester Council submitted a CIL Draft Charging Schedule to the Planning Inspectorate on 30 September 2016.²² The document does not refer to student housing specifically; however, residential developments in the Chester and rural area zone 1 would have a CIL rate of £110/m² (zone 2 would be £0).

²² <http://consult.cheshirewestandchester.gov.uk/portal/other/cil>

Durham County Council

Student population

8.45 The University outlined, as part of its Residential Accommodation Strategy (2012),²³ its aim to increase student numbers in the city by 13% to 2020; an increase to 15,300 students in Durham City (as opposed to its Stockton-on-Tees campus). At 2014/15 levels, the University had 13,482 students based in the city, of which 6,392 were in University-controlled accommodation.

Housing market

8.46 To put the current housing market in context, last year most property sales in Durham were semi-detached properties, selling for an average of £144,739. Terraced properties sold for an average of £144,555 and detached properties for an average of £274,234. Over the past year, house prices were 5% less than the previous year, at a similar level to 2006.²⁴

8.47 The County Durham Issues and Options Strategic Housing Market Assessment (2016)²⁵ noted the high rental demand, particularly in Durham City, attributed to the competitive student rental market. This has an impact on the housing market more generally, as the “demand for student accommodation is a key housing market driver in Durham City” (page 82). Stakeholders considered that more PBSA was needed to meet the demand. At present, Council Tax data indicated that there are 1,763 student properties in County Durham, with over 80% in Durham City.

Local Plan

8.48 The County Durham Plan is in the consultation phase; it has not yet been approved at Inspection.²⁶ The City of Durham Local Plan was adopted in May 2004 and updated in 2007.²⁷

Policy on student housing

8.49 The Council’s policy on student housing is set out in its Interim Policy on Student Accommodation, which covers HMO, student accommodation and PBSA.²⁸ With regards to PBSA, any proposals for new (or changes to existing) buildings have to address the following:

- a. That there is a need for additional student accommodation.

²³ <https://www.dur.ac.uk/estates/planning/>

²⁴ <http://www.rightmove.co.uk/house-prices/Durham.html>

²⁵ <http://durhamcc-consult.limehouse.co.uk/file/4013288>

²⁶ <http://www.durham.gov.uk/article/7440/About-the-County-Durham-Plan>

²⁷ <http://www.durham.gov.uk/article/7215/Durham-City-Local-Plan>

²⁸ http://www.durham.gov.uk/media/10613/Interim-Policy-on-Student-Accommodation/pdf/Interim_Policy_on_Student_Accommodation.pdf

- b. It would not result in a significant negative impact on retail, employment, leisure, tourism or housing use or would support the Council's regeneration objectives.
- c. Consultation with the relevant education provider.

HMOs

8.50 To address imbalances of residential and HMO properties in some areas, the Council has decided to make an Article 4 Direction to require planning permission for changing the use of a property to a HMO; this came into force in September 2016.²⁹ A balance threshold of 10% of residential properties being HMO or student accommodation is being used in planning decisions.

Approach to release of stock

8.51 There is no identified policy regarding the release of stock back into the general market.

Planning gain policy – S106/CIL

8.52 The City of Durham Local Plan outlines the approach to affordable housing under S106. Prospective developers for sites of 25 or more dwellings over 1.0ha are “expected to enter discussions with the Council to provide a fair and reasonable proportion of affordable dwellings” (page 76). The proportion of affordable housing is not fixed, varying according to local needs and constraints.

8.53 In 2013 a draft CIL rate of £150/m² for student accommodation was proposed.³⁰ This remained in the Draft Charging Schedule in September 2016.

²⁹ <http://www.durham.gov.uk/article/2499/Multiple-occupancy-homes>

³⁰ <http://content.durham.gov.uk/PDFRepository/CILInfrastructureLevyRationaleandDraftChargingScheduleOct2013.pdf>

City of Lincoln

Student population

8.54 The total number of students on campus at the University of Lincoln was 12,883, 2014/15 and the University has seen year-on-year growth in numbers. Bishop Grosseteste University in Lincoln has around a further 2,000 students.

Housing market

8.55 To put the current housing market in context, the majority of sales in Lincoln during the last year were terraced properties, selling for an average price of £135,427. Semi-detached properties sold for an average of £152,204, with detached properties fetching £218,478. Overall sold prices in Lincoln over the last year were 4% up on the previous year and 13% up on the 2007 level of £143,740.³¹

Local Plan

8.56 The City of Lincoln Local Plan was adopted in 1998. The Central Lincolnshire Local Plan will progressively replace the Local Plans of the City of Lincoln, West Lindsey, and North Kesteven District Councils. The Central Lincolnshire Local Plan was submitted to the Secretary of State on 29 June 2016.

Policy on student housing

8.57 The Council is supportive of the development of new PBSA. In Policy LP32: Lincoln's universities and colleges of the Further Draft Local Plan 2015,³² the Council states that, in principle, development proposals will be supported where they support the ongoing development of higher and further education establishments in the City, provided that these are well integrated with and contribute positively to their surroundings. University/College-related development proposals will be supported in principle if the development would facilitate their continued growth and assist in maximising the economic benefits the Universities/Colleges bring to Central Lincolnshire.

HMOs

8.58 The City of Lincoln Council has made an Article 4 Direction to remove permitted development rights relating to HMO. From 1 March 2016 planning permission will be required for development comprising a change of use from a traditional dwelling house (Use Class C3) to a HMO for between 3 and 6 unrelated people (Use Class C4). A HMO Supplementary Planning Document (SPD) will outline how the Council intends to implement the Article 4 Direction and manage the development of HMOs by setting out criteria that will be used in the determination of any planning application for the development of these properties within the city's administrative boundary.

³¹ <http://www.rightmove.co.uk/house-prices/Lincoln.html>

³² http://central-lincs.objective.co.uk/events/27004/3545480_accessible.pdf

8.59 The Further Draft Local Plan states that the needs of those requiring subdivided or multi-occupancy living can also be met through the development of purpose-built accommodation, which increases choice for those people and eases the pressure on existing residential areas. Therefore, purpose-built accommodation that helps to meet this identified need will be encouraged in appropriate locations.

Approach to release of stock

8.60 There is no mention of any policy regarding the release of stock back into the general market.

Planning gain policy – S106/CIL

8.61 In the Further Draft Local Plan it states that affordable housing will be sought on all qualifying housing development sites of 3 dwellings or more. However, it is not clear whether affordable housing contributions are sought on development of student accommodation. The Community Infrastructure Levy Preliminary Draft Charging Schedule proposes a charging rate in Zone 1 Lincoln on residential development of £30/m² for houses, zero on flats. It does not specifically mention student housing.

Exeter City Council

Student population

8.62 The University of Exeter had 21,273 students in 2014. Exeter College tertiary college, which provides some university-level courses, had around 10,000 students.

Housing market

8.63 To put the current housing market in context, last year most property sales in Exeter involved terraced properties, which sold for on average £229,867. Flats sold for an average price of £159,977, while semi-detached properties fetched £250,063. During the last year, sold prices in Exeter were similar to the previous year and 16% up on 2013 when the average house price was £211,564.³³

Local Plan

8.64 The Local Plan was adopted in 2005. The Core Strategy Development Plan was adopted in 2012.³⁴

Policy on student housing

8.65 Exeter City Council's Adopted Core Strategy (2012)³⁵ promotes PBSA to meet housing need. Section 6.28 states that the University's aim to provide housing for all full-time students who want it is supported because it will ease pressure on existing family housing. At least 75% of additional student numbers should be accommodated in PBSA. New PBSA should be located on, or close to, the University Campuses, at sustainable locations at or near to major transport routes, or in the city centre.

HMOs

8.66 The Council has made an Article 4 Direction that restricts homeowners' development rights to use their property as HMOs within Class C4 of the Use Classes Order. This applies to about 7,000 properties to the north and east of the city centre. It argues that further planning controls are needed due to the continued growth of student housing in the area that is leading to imbalanced communities. In some streets up to 80% of properties are entirely occupied by students. In the St James Ward as a whole, over 25% of homes are entirely occupied by students. In Exeter, HMOs are largely synonymous with student properties. Over 70% of registered HMOs are exempt from Council Tax due to being wholly occupied by students.

8.67 The Council adopted a policy in 2007 of supporting the expansion of the University of Exeter, subject to a caveat that at least 75% of the additional student numbers should be accommodated in purpose-built accommodation. The University has completed about 1,000 bed spaces of additional accommodation in accordance with this policy,

³³ <http://www.rightmove.co.uk/house-prices/detail.html?country=england&locationIdentifier=REGION%5E494&searchLocation=Exeter>

³⁴ <https://exeter.gov.uk/planning-services/planning-policy/local-plan/core-strategy-development-plan-document/>

³⁵ <https://exeter.gov.uk/media/1636/adopted-core-strategy.pdf>

and about 2,000 bed spaces have planning permission or are under construction (2011). Despite this progress, the Article 4 background information (2011)³⁶ states that the number of private properties that are exempt from Council Tax, due to their entire occupation by full-time students, continues to grow, from 1,184 in 2006 to 1,930 in 2010.

Approach to release of stock

8.68 There is no mention of any policy regarding the release of stock back into the general market.

Planning gain policy – S106/CIL

8.69 Exeter's Viability Assessment, completed in 2009, concludes that, despite the economic downturn, a requirement that 35% of dwellings should be affordable, on sites that are capable of providing three or more dwellings, is reasonable and viable. However, it is not clear whether affordable housing contributions are sought on development of student accommodation as it is not specifically mentioned.

³⁶ <https://exeter.gov.uk/planning-services/planning-policy/local-plan/article-4-direction-houses-in-multiple-occupation/>

Nottingham City Council

Student population

8.70 The University of Nottingham had 33,435 students based in the city in 2015/16. Nottingham Trent University has approximately 27,000 students (2014/15).

8.71 The Local Plan 2 (Section 4.44) estimates that approximately 37,500 full-time students attending the two universities live within Nottingham City, representing around 12% of the population. The majority of university students and some college students move into the City from elsewhere and therefore typically require short-term residential accommodation for the duration of their studies, mostly but not exclusively during term time only.

Housing market

8.72 To put the current housing market in context, last year most property sales in Nottingham involved semi-detached properties, which sold for on average £157,421. Terraced properties sold for an average price of £120,217, while detached properties fetched £258,292. During the last year, sold prices in Nottingham were 4% up on the previous year and 14% up on 2007 when the average house price was £150,458.³⁷

Local Plan

8.73 In Nottingham the Local Plan comprises the Nottingham City Aligned Core Strategy (Part 1 Local Plan), adopted on 8 September 2014, and the 'saved' Local Plan policies, which were adopted in November 2005.³⁸ Work is currently underway to prepare a new Local Plan for Nottingham City. In the future the Local Plan will comprise two documents:

- Nottingham City Aligned Core Strategy (Local Plan Part 1) adopted in 2014.
- Nottingham City Land and Planning Policies Document (Local Plan Part 2) Publication Draft.³⁹

Policy on student housing

8.74 At present just under a half of students' accommodation needs are met by the general housing stock. In the last few years a substantial number of new student bed spaces have been delivered through purpose-built developments (including new development and conversion of existing buildings), and there has been a marked increase in student occupation of city centre flats. Over the same period the number of Council

³⁷ <http://www.rightmove.co.uk/house-prices/detail.html?country=england&locationIdentifier=REGION%5E1019&searchLocation=Nottingham&referrer=landingPage>

³⁸ <http://www.nottinghamcity.gov.uk/planning-and-building-control/planning-policy/the-local-plan-and-planning-policy/#Adopted>

³⁹ <http://www.nottinghamcity.gov.uk/planning-and-building-control/planning-policy/the-local-plan-and-planning-policy/#Adopted>

Tax exempt properties through student occupation has shown signs of falling in the neighbourhoods close to the universities.

- 8.75 It is recognised that shared accommodation within private rented housing close to the universities will remain as the preferred choice for some students. At the same time, it is also appreciated that students have a varied range of housing needs and preferences. Further projected growth in the number of international students moving into the city, for whom purpose-built accommodation is often a preferred option, is also likely to add to the diversity of provision that is required.
- 8.76 In the context of the above trends, together with the protection of existing family housing through Policy HO2 and the Article 4 regulation of HMO and student accommodation afforded by Policy HO6, the encouragement of purpose-built accommodation in appropriate locations as an alternative to the general housing stock continues to form an important element of the Council's housing policy framework and is consistent with the Housing Nottingham Plan 2012-2015 (Local Plan Part 2, 4.48).
- 8.77 There is a continuing need for purpose-built housing, which should be close to the Universities, accessible by public transport and in locations which minimise the impacts on surrounding communities (Local Plan 2.29). If the City Council considers that there would be a danger of environmental nuisance from the development, where possible, it will negotiate with the developer for management arrangements sufficient to integrate the scheme into the existing community. The overconcentration or unsuitable location of new PBSA could prejudice the City Council's aim of developing and maintaining balanced communities. PBSA of an appropriate scale and design will be encouraged in the following locations (Local Plan Part 2, HO5):
- a. Allocated sites where student accommodation use accords with site-specific Development Principles.
 - b. University campuses.
 - c. Within the City Centre boundary (as shown on the Policies Map), subject to accordance with site- and area-specific policies, including relevant 'Quarter Policies' but excluding the areas of predominantly family housing.
 - d. Above shopping and commercial frontages within defined Town, District and Local Centres, and within other shopping and commercial frontages on main transport routes where this assists in the regeneration of underused sites and premises and is consistent with relevant defined Centre policies.
 - e. Sites where student accommodation accords with an approved SPD.
- 8.78 Within the historic core of the Quarter, planning applications for the development of PBSA (including conversions) will not be supported as such development could adversely impact on the historic character of the area, its tourism and visitor potential and established residential uses (Local Plan Part 2, 3.172).

HMO

- 8.79 It is recognised that HMO make an important contribution towards helping to meet the City's accommodation needs and that whilst many HMO in the City are occupied by students, HMO also make a vital contribution to addressing wider housing needs, playing a particularly important role in providing accommodation for many other groups on low incomes as well as a large proportion of younger members of the population for whom entry onto the property market as a first-time buyer is becoming increasingly delayed (Local Plan 2, 4.55).
- 8.80 However, in some parts of the City, sustainable communities' objectives have been undermined due to concentrations of HMO and other forms of shared housing, particularly, but not exclusively, in areas close to the universities. Both HMO and PBSA comprise a form of typically short-term, shared housing often occupied by younger age groups, many of which share similar lifestyle characteristics. Where concentrations of such uses develop, this can have a distorting effect on neighbourhoods, with many residents not having a long-term stake in the community, and some service needs of longer-term residents, such as schools, becoming unsustainable. Due to the common characteristics between HMO and PBSA, this policy seeks to manage the number and distribution of both HMO and PBSA to prevent the further development of further concentrations within the City and the exacerbation of existing concentrations (Local Plan Part 2, 4.57).
- 8.81 Where there is already a 'Significant Concentration' of HMO and/or student households in an area, planning permission will therefore not usually be granted for further HMO or PBSA. A 'Significant Concentration' is considered to be 10% (Local Plan Part 2, 4.60).
- 8.82 This problem is most acute within Nottingham, and in order to help address this the City Council has introduced an Article 4 Direction that requires planning permission to be obtained before converting a family house (C3 Dwellinghouse) to a HMO with between 3 and 6 unrelated occupiers sharing basic amenities (C4 HMO), thereby enabling it to better manage the future growth and distribution of C4 HMO across the City. The policy approach to considering planning applications for student accommodation, C4 HMO and larger 'sui generis' HMO with 7 or more occupiers sharing basic amenities will be set out in Nottingham City's part 2 Local Plan.

Approach to release of stock

- 8.83 There is no mention of any policy regarding the release of stock back into the general market.

Planning gain policy – S106/CIL

- 8.84 On sites providing student dwellings, a commuted sum will be required in lieu of on-site affordable housing provision.

Leeds City Council

Student population

8.85 The University of Leeds has more than 30,000 students. Leeds Beckett University has another 30,000 full-time and part-time degree students.

Housing market

8.86 To put the current housing market in context, most of the sales in Leeds over the past year were semi-detached properties, which on average sold for £185,980. Terraced properties had an average sold price of £140,848 and flats averaged at £130,263. In the past year house prices in Leeds were 4% up on the year before and 11% up on 2007 when they averaged at £165,546.⁴⁰

Local Plan

8.87 The Core Strategy was formally adopted by Leeds City Council on 12 November 2014.

Policy on student housing

8.88 Student housing is discussed under 'Social Housing Needs', stating that, in addition to ensuring a sufficient overall supply of housing in Leeds District, it is equally important to ensure that some of this total will serve to accommodate the needs of certain groups whose needs may be largely ignored by providers operating solely according to market criteria. Numerically the most significant of these groups are households on low incomes, elderly people, ethnic minorities, people suffering from physical disabilities, and students .

8.89 The Core Strategy: Leeds Local Development Framework Adopted November 2014⁴¹ Section 5.2.26 states that the period between 2001 and 2012 witnessed considerable development of new PBSA particularly in and around the north west sector of the City Centre. Growth in this accommodation is to be welcomed in order to meet need and to deflect pressure away from private rented houses in areas of overconcentration. Nevertheless, care is needed to ensure that PBSA does not itself become overconcentrated and is located with good access to the universities.

8.90 Development proposals for PBSA will be controlled:

- a. To help extend the supply of student accommodation, taking pressure off the need for private housing to be used.
- b. To avoid the loss of existing housing suitable for family occupation.

⁴⁰ <http://www.rightmove.co.uk/house-prices/Leeds.html>

⁴¹ <http://www.leeds.gov.uk/SiteAllocationMaps/Core%20Strategy/Adopted%20Core%20Strategy%20Nov%202014%20Final.pdf>

- c. To avoid excessive concentrations of student accommodation (in a single development or in combination with existing accommodation), which would undermine the balance and wellbeing of communities.
- d. To avoid locations that are not easily accessible to the universities by foot or public transport or that would generate excessive footfall through residential areas, which may lead to detrimental impacts on residential amenity.
- e. To ensure the proposed accommodation provides satisfactory internal living accommodation in terms of daylight, outlook and juxtaposition of living rooms and bedrooms.

HMO

- 8.91 HMO are recognised as a key element in the overall housing market. The LDF Core Strategy 2014⁴² states that HMO are an increasingly popular part of the housing market within Leeds. As rooms can be rented individually they provide affordable accommodation used primarily by students, young people and those on lower incomes. Whilst the need for this type of accommodation is not in dispute, HMO tend to be grouped together in certain inner-city areas, becoming the dominant type of housing, which can lead to social and environmental problems for local communities.
- 8.92 There is an Article 4 Direction covering all of inner Leeds and adjoining suburbs, although “a property occupied by students which is managed by the education establishment” is not classed as a dwellinghouse in the C4 Use Class.
- 8.93 However, in Section 5.2.24 it is recognised that some streets (or a part of a street) may already have such a high concentration of HMO that the conversion of remaining C3 dwellings will not cause further detrimental harm. Also, in the interpretation of H6A it may be the case that the remaining C3 dwellings would be unappealing and effectively unsuitable for family occupation. In such circumstances Policy H6A would not be used to resist changes of use of such dwellings to HMO.
- 8.94 The Strategy also states (Section 5.2.25) that, in order to encourage landlords to experiment with lettings of HMO to non-HMO occupants, the Council will consider granting flexible C3/C4 permissions for new and existing C4 HMO. This will enable a C4 HMO to convert to a C3 dwelling house without losing the potential to revert back to C4 use within a fixed period (normally 10 years). If a property has a lawful C4 use when applying for a flexible permission this will then be a material consideration when the Council considers the planning application. The permission will enable flexibility to let a property between C3 and C4 uses during the specified period. On expiry of the dual use period the use of the property at that time would become the permitted use of the property.

Approach to release of stock

⁴²<http://www.leeds.gov.uk/SiteAllocationMaps/Core%20Strategy/Adopted%20Core%20Strategy%20Nov%202014%20Final.pdf>

8.95 There is no mention of any policy regarding the release of stock back into the general market.

Planning gain policy – S106/CIL

8.96 S106 affordable housing requirements are highest in the 'Outer area/Rural North' zone, at 35%, reducing to 15% in the outer and inner suburbs, and to 5% in the Inner Areas and City Centre, reflecting housing market weakness in the Inner Areas and high prices but limited opportunity in the City Centre (Affordable Housing SPG Annex Update 205: Revision April 2014). This policy applies to developments of 15 units or more.⁴³ However, there is no apparent requirement for student accommodation developments to provide affordable housing.

⁴³ [http://www.leeds.gov.uk/council/Pages/Supplementary-planning-guidance---retained-\(LDF\).aspx](http://www.leeds.gov.uk/council/Pages/Supplementary-planning-guidance---retained-(LDF).aspx)

Reading Borough Council

Student population

8.97 The University of Reading has just over 17,000 students.

8.98 The Strategic Housing Market Assessment (2016) notes that the growth in international students (who tend to reside in halls of residence) is expected to make up around one third of the overall growth (969 students). Similarly, as the majority of growth is in undergraduate numbers this will lessen the impact on the wider housing market as a high percentage reside in halls of residence. The level of growth is likely to bring the student numbers at the institution back to previous record high levels. The SHMA asserts that with the increased supply of student accommodation (private halls of residence) coming through the pipeline there is unlikely to be a significant need over and above previous levels.

Housing market

8.99 To put the current housing market in context, most of the sales in Reading over the past year were terraced properties, which on average sold for £304,023. Flats had an average sold price of £228,199 and semi-detached properties averaged at £378,621. In the past year house prices in Reading were 10% up on the year before and 33% up on 2013 when they averaged at £247,636.⁴⁴

Local Plan

8.100 Reading Borough Council is working on producing a new Local Plan, which will replace the current development plans (the Core Strategy, Reading Central Area Action Plan and Sites and Detailed Policies Document) with a new plan setting out how Reading will develop up to 2036.

Policy on student housing

8.101 There appears to be no mention of student accommodation in any planning document.

HMO

8.102 It is recognised that residential conversions have an important role to play in housing land supply in Reading with the subdivision of large houses providing a valuable supply of reasonably affordable private rented accommodation. However, the significant loss of family housing can erode the character of an area and, either individually or cumulatively, can have a harmful impact on the character of the area through unduly diluting mixed and sustainable communities, as set out in more detail in the supporting text to policy DM8: Residential Conversions.⁴⁵

⁴⁴ <http://www.rightmove.co.uk/house-prices/Reading.html>

⁴⁵ <http://www.reading.gov.uk/media/1066/Residential-Conversions-Supplementary-Planning-Document-Adopted-November-2013/pdf/Residential-Conversions-Supplementary-Planning-DocumentNov13.pdf>

8.103 Any residential conversion must contribute to achieving an appropriately mixed and sustainable community by providing an acceptable housing mix, ensuring that, as appropriate, single family housing remains the dominant form of dwelling in the vicinity of the application, and ensuring there is not a detrimental impact on the physical character of the area.

8.104 There is a very restrictive policy aimed at limiting the proportion of HMO to a maximum of 25% of the residential accommodation within 50m of each proposed new HMO within the Article 4 Direction area.

Approach to release of stock

8.105 There is no mention of any policy regarding the release of stock back into the general market.

Planning gain policy – S106/CIL

8.106 All developments of 15 dwellings and above will provide 30% of the total number of dwellings in the form of affordable housing to meet the needs of the area, as defined in a housing needs assessment (Policy CS16: Affordable Housing, 2013).⁴⁶ However, there is no apparent requirement for student accommodation developments to provide affordable housing.

⁴⁶ <http://www.reading.gov.uk/media/1063/Affordable-Housing-Supplementary-Planning-Document-Adopted-July-2013/pdf/Affordable-Housing-Supplementary-Planning-DocumentJul13.pdf>

Bristol City Council

Student population

8.107 The University of Bristol had just over 17,000 students in 2015/16. The University of the West of England, located near the City of Bristol, had just over 27,000 students in 2014/15.

Housing market

8.108 To put the current housing market in context, the majority of sales in Bristol during the last year were terraced properties, selling for an average price of £263,294. Flats sold for an average of £216,590, with semi-detached properties fetching £289,684. Overall sold prices in Bristol over the last year were 10% up on the previous year and 26% up on the 2013 level of £217,514.⁴⁷

Local Plan

8.109 The Local Plan includes a Core Strategy, adopted in 2011.⁴⁸

Policy on student housing

8.110 The Site Allocations and Development Management Policies (adopted 2014) state that specialist student housing schemes will be acceptable within the city centre. Other locations may be suitable subject to the general criteria set out in the Policy (i.e. the criteria for assessing HMO applications).

8.111 Section 2.2.9 states that the expansion in higher education in recent years has increasingly led to the development of specialist student housing schemes. Much of this development has taken the form of managed residential accommodation comprising either 'cluster units' or individual small apartments. (Cluster units are self-contained apartments, each having a number of individual bedrooms/study units sharing communal facilities. The accommodation usually has an on-site management team.) This type of housing can help to ease demand for student accommodation and relieve pressure on the local housing stock. Continuing provision of this type of accommodation is generally supported.

8.112 Section 2.2.10 states that Bristol City Centre remains, in principle, an acceptable location for this type of development. Most parts of the city centre are within reasonable walking distance of the University of Bristol and good public transport connections exist to the University of the West of England. Student accommodation can help make a positive contribution to the mix of uses within the city centre and is less likely to result in harmful impacts on residential amenity. Further policy criteria are provided in the Bristol Central Area Plan. Other locations outside of the city centre may also be suitable provided development meets the policy's general criteria. No sites are specifically allocated for student accommodation.

⁴⁷ <http://www.rightmove.co.uk/house-prices/Bristol.html>

⁴⁸ <https://www.bristol.gov.uk/planning-and-building-regulations/local-plan>

HMO

8.113 The sub-division of existing accommodation and the supply of shared housing provide an important contribution to people's housing choice. The policy aims to ensure that such development also preserves the residential amenity and character of an area and that harmful concentrations do not arise. The policy also aims for a good standard of accommodation. There is an Article 4 Direction covering seven wards in the city centre.

Approach to release of stock

8.114 The West of England Joint Spatial Plan: Wider Bristol HMA Strategic Housing Market Assessment (2015) states that the household projections did not assume any growth of students living in communal establishments, so any net increase in bed spaces provided in halls of residence (or other university accommodation) across the area would reduce the demand from student households.

8.115 Although the Plan notes that policy encouraging more dedicated student accommodation may provide low-cost housing that takes the pressure off the private rented sector and increases the overall housing stock, there is no mention of any specific policy regarding the release of stock back into the general market.

8.116 The Plan concludes that, overall, the evidence suggests that the Wider Bristol student housing market is well established and is unlikely to change significantly, as future expansion will be relatively limited. However, demand exists for specialist student housing and both the market and the Council have responded by creating the necessary structures to enable significant new supply (Section 59).

Planning gain policy – S106/CIL

8.117 Affordable housing obligations are required from all residential development proposals containing 15 or more dwellings (Planning Obligations: Supplementary Planning Document, adopted 2012).⁴⁹ Residential development is defined as development applied for under Use Class C3 (A to C) of the Use Classes Order 2010. As well as traditional market dwellings, this will include proposals for self-contained student accommodation. Non self-contained residential accommodation specifically managed for students only is exempt.

8.118 The Community Infrastructure Levy Charging Schedule (adopted 2012)⁵⁰ states that the following development types will be liable for CIL:

- Development comprising 100m² or more of new-build floorspace.

⁴⁹<https://www.bristol.gov.uk/documents/20182/34520/SPD%20Final%20Doc%20Dec2012.pdf/daf75908-50fd-4138-afed-770310a6a431>

⁵⁰ <https://www.bristol.gov.uk/documents/20182/33588/CIL+Charging+Schedule.pdf/2f70e1ce-1c68-41c7-a8ca-a77724926d4f>

- Development of less than 100m² that results in the creation of one or more dwellings.
- The conversion of a building that is no longer in lawful use.

8.119 Student accommodation is charged at £100/m².

Camden

Student population

8.120 The 2011 Census indicated that 25,130 full-time students aged 18 and over were resident in Camden during term time, or 11.4% of the usual resident population.⁵¹

Housing market

8.121 Last year most property sales in Camden involved flats, which sold for on average £830,074. Terraced properties sold for an average price of £1,945,881, while semi-detached properties fetched £3,171,028. The priciest area within Camden was High Holborn (£1,423,125) and the least expensive was St Pancras (£592,634). During the last year, sold prices in Camden were 5% up on the previous year and 26% up on 2013 when the average house price was £838,010.⁵²

Local Plan

8.122 On 24 June 2016 the Council submitted the Camden Local Plan and supporting documents to the Secretary of State for Communities and Local Government for independent examination.⁵³

Policy on student housing

8.123 The Local Plan Policy H9 Student Housing⁵⁴ seeks a supply of student housing to meet Camden's target of 160 additional places in student housing per year, and Camden will support the development of student housing provided that the development:

- will not involve the net loss of 2 or more self-contained homes;
- will not prejudice the Council's ability to meet the target of 742 additional self-contained homes per year;
- will not involve land identified for self-contained housing through a current planning permission or a development plan document;
- complies with any relevant standards for HMO;
- serves higher education institutions based in Camden or adjoining boroughs;
- includes a range of flat layouts including flats with shared facilities;

⁵¹ http://camden.gov.uk/ccm/cms-service/stream/asset/?asset_id=3414429&

⁵² <http://www.rightmove.co.uk/house-prices-in-Camden-93941.html>

⁵³ <http://camden.gov.uk/ccm/navigation/environment/planning-and-built-environment/planning-policy/local-development-framework/;jsessionid=835B90A7C5DA4B947ABDE732D46F8D36>

⁵⁴ http://camden.gov.uk/ccm/cms-service/stream/asset/?asset_id=3414429&

- has an undertaking in place to provide housing for students at one or more specific education institutions, or otherwise provide a range of accommodation that is affordable to the student body as a whole;
- will be accessible to the institutions it will serve and to public transport, workplaces, shops, services, and community facilities;
- contributes to creating a mixed, inclusive and sustainable community; and
- does not create a harmful concentration of such a use in the local area or cause harm to nearby residential amenity.

8.124 The Local Plan (Section 3.205) notes that the main alternative source of accommodation available to students in Camden is private rented housing. Depending on property size, median private rents in Camden have risen by 6% to 17% from mid-2011 to mid-2014 (based on VOA data in the GLA Rents Map, with the largest rises applying to homes 4-or-more bedrooms). The Council considers that the provision of additional designated student housing can help to limit additional pressure on the wider private rented market.

8.125 The Plan estimates that Camden's requirement for additional student housing during the Plan period is 160 places per year, or 2,400 places in total, and through planning permissions already in place and designations in Camden's development plan documents considers there are deliverable sites in place to meet requirements to 2020-21 and developable sites to meet requirements for the subsequent 10 years. However, given the concentration of higher education institutions in Camden, it is expected that pressure for student housing development will continue.

8.126 Policy H1 indicates that self-contained housing is the priority land use of the Plan, while policy H3 resists proposals involving the net loss of two or more homes. Given this priority, Camden will resist proposals for student housing that involve redeveloping two or more self-contained homes, or the development of a site allocated for self-contained homes in the Camden Site Allocations document. Camden will also resist proposals involving the development of a site that has an existing consent for self-contained housing where the consented scheme would better meet Camden's housing needs and there is a reasonable prospect of the consent being implemented.

8.127 Where new student housing is proposed the Council will negotiate planning obligations to ensure that the term-time occupiers are students at one or more recognised institutions, which will generally be institutions supported by the Higher Education Funding Council for England (HEFCE) and based in Camden or an adjoining borough.

8.128 As noted in paragraph 3.203, there are a number of other colleges in the borough that help to support Camden's international academic reputation. The final report of the Mayor's Academic Forum 2014 estimated that 14% of London's full-time students could be at colleges of this type. In some instances the Council may support development of student housing by these colleges.

8.129 To ensure that a proportion of student housing is available at competitive rates, the Council will:

- expect student housing developments to include clustered study-bedrooms with some shared facilities;
- prevent lease or sale of the accommodation as general market housing;
- wherever possible tie occupation to students attending a specified institution or institutions; and
- where specific institutions are not specified, subject to viability, expect student housing developments to include an element of student accommodation that is affordable in the context of average student incomes and rents for comparable accommodation provided by Camden-based universities.

HMO

8.130 Policy H10 in the Local Plan: Housing with shared facilities (HMO) specifies that the Council will aim to ensure that there is continued provision of housing with shared facilities to meet the needs of small households with limited incomes and modest space requirements. They will support development of housing with shared facilities (HMO) provided that the development:

- will not involve the loss of two or more self-contained homes;
- will not involve land identified for self-contained housing through a current planning permission or a development plan document;
- complies with any relevant standards for houses in multiple occupation;
- contributes to creating a mixed, inclusive and sustainable community;
- does not create a harmful concentration of such a use in the local area or cause harm to nearby residential amenity; and
- is secured as a long-term addition to the supply of low-cost housing, or otherwise provides an appropriate amount of affordable housing, having regard to policy H4.

Approach to release of stock

8.131 There is no mention of any policy regarding the release of stock back into the general market.

Planning gain policy – S106/CIL

8.132 The Local Plan states that where a proposed student housing development is not robustly secured as student housing in accordance with criterion (g) the Council will expect the development to provide an appropriate amount of affordable housing for general needs having regard to policy H4.

Islington

Housing market

8.133 Last year most property sales in Islington involved flats, which sold for on average £642,887.⁵⁵ Terraced properties sold for an average price of £1,416,528, while semi-detached properties fetched £2,240,400. During the last year, sold prices in Islington were 7% up on the previous year and 36% up on 2013 when the average house price was £564,396.

Local Plan

8.134 The Local Plan is made up of various documents and contains a number of policies for ensuring that the borough develops in a sustainable manner. The Core Strategy is the key document within Islington's Local Plan. It sets out Islington Council's strategic vision for the borough up to 2025, and was adopted in February 2011.⁵⁶

Policy on student housing

8.135 The Core Strategy⁵⁷ (Section 3.3.23) states that Higher Education is a very important employer in London, and in turn student accommodation contributes to the economic prosperity of London. However, a huge increase in the development of student halls of residence in Islington in recent years is providing a large number of student bedrooms and the potential of overconcentration of student accommodation. The sheer scale of applications for student accommodation in the borough raises real concern as it can threaten the attempt to achieve a more mixed balanced and stable population. The Council has exceeded its targets for student housing many times over in recent years and believes that some action is now required to ensure a balanced approach is taken that weighs the benefits of student accommodation against its impact on the wider community. In addition, land for housing and employment uses in Islington is in very short supply, making delivery of these two uses the Council's absolute priority.

8.136 The London-wide Strategic Land Availability Assessment addresses the issues of student accommodation and has informed provisional targets for this form of housing in each London borough. In addition, the need for student accommodation will be addressed through a sub-regional Strategic Housing Market Assessment (SHMA), referred to above. The Council will provide details in a supplementary planning document of how concentration of student accommodation is measured and what level of concentration is regarded as acceptable.

8.137 In Policy CS12 Meeting the housing challenge, it states that student accommodation developments will help increase access to higher and further education and tackle worklessness by providing funding for bursaries for students leaving council care and

⁵⁵ <http://www.rightmove.co.uk/house-prices/Islington-87515.html>

⁵⁶ https://www.islington.gov.uk/planning/planningpol/local_dev_frame

⁵⁷ <https://www.islington.gov.uk/~media/sharepoint-lists/public-records/environmentalprotection/qualityandperformance/reporting/20112012/20120303corestrategyfebruary2011.pdf>

other Islington students facing hardship who are attending a higher or further education establishment. The funding provided by the development will be an annual payment equivalent to the rent level charged for a percentage of the student bedrooms in a development. The payments will continue for as long as the site is used for student accommodation. The percentage of student bedrooms used for this payment will be set in a supplementary planning document.

8.138 The Student Accommodation Contributions for Bursaries Supplementary Planning Document⁵⁸ (SPD) provides details on the implementation of Core Strategy policy CS12, Part J.

8.139 The SPD identifies the specific level of contribution that student accommodation developments will need to provide towards student bursaries. The Council will set the requirement to pay a financial contribution for student bursaries equivalent to 2.4% of the total annual rental income from a development of student accommodation for 30 years or as long as the site is used for student accommodation, whichever is the shorter period of time.

HMO

8.140 Islington has a mandatory HMO licensing scheme.⁵⁹ This scheme aims to ensure that larger, higher-risk HMO meet HMO standards and are adequately managed. It applies to any rented property that is three or more storeys high and is occupied by five or more people in more than one household. Additional licensing was introduced for both Holloway Road and Caledonian Road as there was evidence that the majority of HMO in these areas were poorly managed.

Approach to release of stock

8.141 There is no mention of any policy regarding the release of stock back into the general market.

Planning gain policy – S106/CIL

8.142 The London Plan states that boroughs should not seek conventional affordable housing contributions on applications for student accommodation, but this does not preclude these developments from providing affordable student accommodation. The Council has already secured funding and subsidised rents for student accommodation through S106 agreements for new student halls or residences.

8.143 The CIL charge for student accommodation is £400/m² and for residential dwellings (Use classes C3, C4) is £300/£250/m².⁶⁰

⁵⁸ https://www.islington.gov.uk/planning/planningpol/pol_supplement/student-accommodation-contributions-for-bursaries

⁵⁹ <https://www.islington.gov.uk/housing/landlords/houses-in-multiple-occupation/hmos-and-islington>

⁶⁰ <https://www.islington.gov.uk/~media/sharepoint-lists/public-records/planningandbuildingcontrol/publicity/publicconsultation/20142015/20140829islingtoncilchargeinschedule010914.pdf>

Southwark

Student population

8.144 Southwark has the second largest number of student homes in London. The area hosts two large tertiary institutions, which bring around 30,000 students into the area each week. London South Bank University (LSBU) has just under 18,000 students.

Housing market

8.145 The majority of sales in Southwark during the last year were flats, selling for an average price of £547,180. Terraced properties sold for an average of £789,567, with semi-detached properties fetching £1,104,588. Overall sold prices in Southwark over the last year were 11% up on the previous year and 39% up on the 2013 level of £441,443.⁶¹

Local Plan

8.146 The New Southwark Plan Preferred Option Draft is dated October 2015.⁶² The policies in the plan are currently in their second draft.

8.147 The New Southwark Plan will replace the two adopted planning policy documents that currently form the Local Plan. These are the saved Southwark Plan policies (2007) and the Core Strategy (2011).

Policy on student housing

8.148 In the New Southwark Plan Preferred Option policy DM22 Student homes⁶³ states that planning permission will be granted for student homes in Regeneration Areas to support the growth of universities and colleges where:

- schemes providing direct-let student rooms at market rent provide 35% of the Gross Internal Area as conventional affordable housing, and 27% of student rooms let at a rent that is affordable to students;
- schemes providing affordable student rooms for nominated further and higher education institutions provide as much conventional affordable housing as is viable;
- adequate living space is provided;
- 10% of student rooms are easily adaptable for occupation by wheelchair users;
- there is an excellent public transport accessibility level;
- the development would not harm local character or residential amenity through an overconcentration of student homes.

⁶¹ <http://www.rightmove.co.uk/house-prices-in-Southwark.html>

⁶² http://www.southwark.gov.uk/info/856/planning_policy/3943/local_plan

⁶³ http://www.southwark.gov.uk/downloads/download/4346/new_southwark_plan_preferred_option

HMO

8.149 In the New Southwark Plan Preferred Option policy DM7 Houses in multiple occupation and hostels, it states that planning permission will be granted for new HMO and hostels that provide support for vulnerable people where:

- there is no overconcentration of these types of uses within the local area;
- HMO meet the Council's Standards for HMO;
- there is an identified local need for hostel provision;
- planning permission will not be granted for the change of use from hostels where it meets an identified local housing need.

8.150 Where there is already a high concentration of these types of accommodation in one particular area, the Council may consider the use of Article 4 Directions to restrict the amount of accommodation of these types coming forward in future.

Approach to release of stock

8.151 There is no mention of any policy regarding the release of stock back into the general market.

Planning gain policy – S106/CIL

8.152 The Council will require provision of affordable housing in new developments to help address the current shortage of affordable homes in the borough. The threshold is a student housing scheme of 30 or more bed spaces and living spaces, or where the development is over 0.5 hectares (whichever is smaller).

8.153 In terms of CIL charges, the Council will seek a Section 106 planning obligation to secure controlled rent levels for university-nomination student housing developments. Universities providing student accommodation will have three options when considering their CIL payment:

- Provide student accommodation as the majority land owner. This will allow them to apply for Charitable Relief and not be liable to pay CIL.
- Provide student accommodation with another party but restrict the rents. This will not be subject to CIL but will need a Section 106 Planning Obligation to make sure the low rent is maintained.
- Provide direct-let student accommodation with another party. This would be CIL liable for £100/m² (as set out in the CIL charging schedule).

8.154 BNP Paribas Real Estate's study 'Student Housing Study: Implementation' (March 2011) identifies two separate types of student accommodation. This has been confirmed in the representations to the consultation on the Southwark Council CIL by the major student accommodation providers in the borough. One type of accommodation is market student housing, which charges unrestricted rents. The

other, usually tied to a university, is restricted rents at lower than market levels. Given that there is a viability consequence of offering restricted rents, Southwark Council's CIL is not applied to student accommodation with restricted rents. A planning obligation will be sought where proposals include restricted rent student accommodation, to make sure that the low rent is provided.