



**Planning Advisory Service
Local Plan Support**



**Canterbury City Council
SHMA Production Support**

Student Population Projection Research

Report by Intelligent Plans and Examinations (IPE) Ltd

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1. Introduction

- 1.1 Intelligent Plans & Examinations (IPE) was commissioned by the Planning Advisory Service (PAS) in May 2020 as part of its Local Plan Support programme to provide support to Canterbury City Council (CCC) in the preparation of its Strategic Housing Market Assessment (SHMA) as part of the evidence base to determine the numbers and types of homes required to support the City Council's Local Plan Review.
- 1.2 Specifically, IPE were requested to provide advice on a robust approach to calculating potential student numbers, and the resultant housing requirement, for the new Local Plan. This formed one part of a wider brief, including work to be undertaken by Edge Analytics, using the 'popgroup' model to make a variety of data projections and market conditions to support projections in the SHMA. A copy of the project brief issued in July 2020 is attached at Annex A.
- 1.3 A preliminary meeting was held on 13th May 2020, attended by Karen Britton, Andrew Thompson and Shelly Rouse (CCC), Stephen Barker and Martin Hutchings (PAS), David Roberts (MHCLG) and Derek Stebbing (IPE), to discuss the scope of the commission, which enabled us to commence some initial research on student housing requirements. Following the confirmation of the project brief, further progress meetings were held on 25th November and 11th December 2020, both attended by Shelly Rouse (CCC) and Derek Stebbing (IPE), and, finally, on 18th February 2021, attended by Louise Randall and Shelly Rouse (CCC), Peter Boden and Kate Staines (Edge Analytics) and Derek Stebbing (IPE).
- 1.4 This report sets out our research findings, assessment and conclusions in respect of the approach that can be taken by Canterbury City Council in calculating the potential student housing requirement as part of its Local Housing Needs Assessment.

2. The Canterbury Context

- 2.1 To provide a broad picture of the overall existing student population within the Canterbury district, the following data is drawn from the City Council's research document, *Higher and Further Education in the Canterbury District - An Impact Review*, published in January 2017¹. Whilst now some four years old, this data serves to indicate the size of the total student population within the four Higher and Further Education establishments within the City Council area, and some indications of the broad housing requirements within the district at that time.

Canterbury College (CC) – Further Education

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https://www.canterbury.gov.uk/downloads/file/166/higher_and_further_education_impact_review_document

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There are 8,194 students studying at Canterbury College.
81% of students are full-time and 19% are part-time.
61% of students are between 16 and 18 years old, 21% are between 19 and 23 years old and 18% are 24 years old and over.

The College is based in the city of Canterbury and has a sister College on the Isle of Sheppey.

The College has recently entered into a partnership with East Kent College, with campuses in Broadstairs, Dover and Folkestone.

Canterbury Christ Church University (CCCU) – Higher Education

12,319 students were studying at CCCU on the Canterbury Campus in 2014/15.
72% of students are full-time and 28% are part-time.
58% of students are under 21 years, 24% are between 21 and 24 years and 17% are 25 years old and over.
94% of the student population is from the UK.

CCCU is a multi-campus University with campuses at Canterbury, Broadstairs, Medway and Tunbridge Wells.

University for the Creative Arts (UCA) – Higher Education

1,013 students are studying at the UCA Canterbury Campus.
96% of students are full-time students and 4% are part time.
The majority (66%) of full-time students are between 18 and 20 years old.
17% of the student population are international or EU students.

UCA is a multi-campus University with campuses at Canterbury, Epsom, Farnham and Rochester.

University of Kent (UoK) – Higher Education

16,060 students are studying at the UoK Canterbury campus.
93% of students are full-time and 7% are part-time.
62% of students are under 21 years old, 26% are between 21 and 24 years and 12% are 25 years and over.
73% of the student population is from the UK.

UoK has campuses at Canterbury and Chatham.

- 2.2 At 2017, approximately 50,400 people lived in the City of Canterbury. Of that population, 5,700 people were aged 18-19 and 11,500 people were aged between 20 and 24, therefore constituting around 34% of Canterbury's total resident population. Of the 29,392 students studying in Canterbury in 2017, data from the universities suggested that

16,285 students were studying full-time and had moved into Canterbury, and were therefore in need of local accommodation. Of those 16,285 students, around 45% of students were being accommodated by the universities, leaving approximately 9,165 students requiring accommodation in the private sector, largely within the private rented sector, in the city. Most of these students lived in shared houses within existing communities.

- 2.3 From Council Tax records, between 2006 and 2016 the number of dwellings in Canterbury with student occupants increased from 1,885 to 4,530. This includes 729 dwelling units in halls of residence with the remainder being largely shared households within the community. The location of these student households was almost exclusively in the Canterbury area with a small proportion in the towns of Whitstable and Herne Bay and the local villages. The largest concentrations of off-campus student households were in residential areas in close proximity to the university campuses particularly in the north and east of the city.

3. National Planning Policy and Advice

- 3.1 The National Planning Policy Framework (NPPF), at paragraphs 60 and 61, states:

60 To determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning guidance – unless exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals. In addition to the local housing need figure, any needs that cannot be met within neighbouring areas should also be taken into account in establishing the amount of housing to be planned for.

*61 Within this context, the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies (including, but not limited to, those who require affordable housing, families with children, older people, **students**, people with disabilities, service families, travellers, people who rent their homes and people wishing to commission or build their own homes).*

- 3.2 Planning Practice Guidance (PPG) contains the following guidance regarding student housing:

“How can student housing needs be assessed?”

Strategic policy-making authorities need to 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. Encouraging

more dedicated student accommodation may provide low cost housing that takes pressure off the private rented sector and increases the overall housing stock. Strategic policy-making authorities 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 university-provided accommodation. Local Planning Authorities will also need to engage with universities and other higher educational establishments to ensure they understand their student accommodation requirements in their area."

PPG Paragraph: 004 Reference ID: 67-004-20190722

"How can authorities count student housing in the housing land supply?

All student accommodation, whether it consists of communal halls of residence or self-contained dwellings, and whether or not it is on campus, can in principle count towards contributing to an authority's housing land supply based on:

- the amount of accommodation that new student housing releases in the wider housing market (by allowing existing properties to return to general residential use); and / or*
- the extent to which it allows general market housing to remain in such use, rather than being converted for use as student accommodation.*

This will need to be applied to both communal establishments and to multi bedroom self-contained student flats. Several units of purpose-built student accommodation may be needed to replace a house which may have accommodated several students.

Authorities will need to base their calculations on the average number of students living in student only accommodation, using the published census data and take steps to avoid double-counting. The exception to this approach is studio flats designed for students, graduates or young professionals, which can be counted on a one for one basis. A studio flat is a one-room apartment with kitchen facilities and a separate bathroom that fully functions as an independent dwelling."

PPG Paragraph: 034 Reference ID: 68-034-20190722

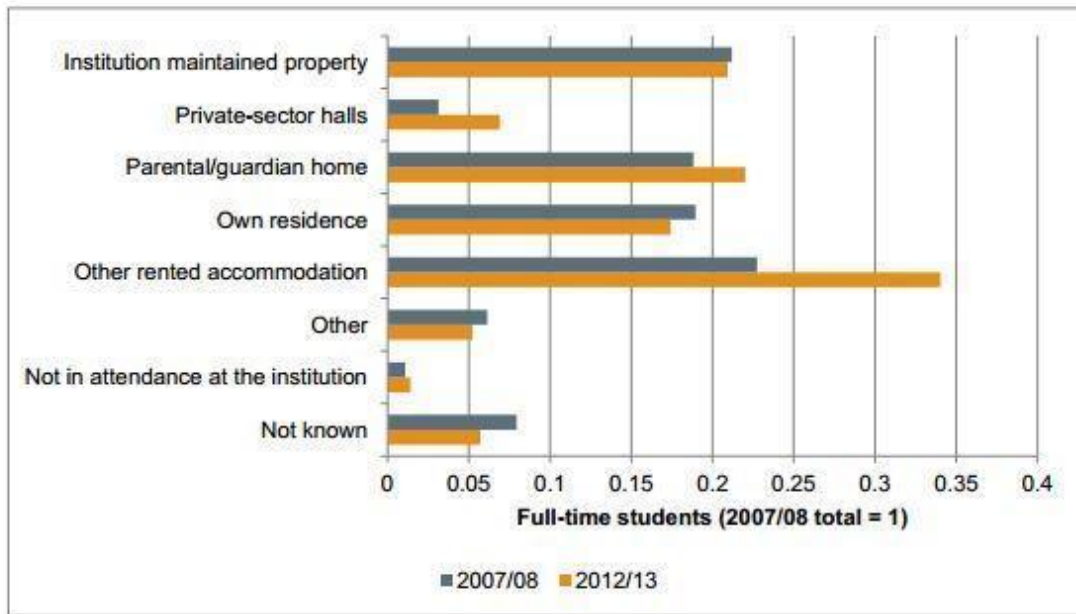
- 3.3 There is no additional recent national policy guidance on the calculation of student housing requirements for Local Housing Needs Assessments (or for Strategic Housing Market Assessments).
- 3.4 However, the Housing Delivery Test (HDT) Measurement Rule Book (July 2018), at paragraphs 9 and 10, contains the following:

- “9. The adjustments for student and other communal accommodation will be calculated by MHCLG and added into the Housing Delivery Test result. Adjustments are applied using two nationally set ratios, based on England Census data.*
- 10. The national average number of students in student only households is 2.5. This has been calculated by dividing the total number of students living in student only households by the total number of student-only households in England. Source data is from the Census 2011 and is published by the Office for National Statistics. The ratio will be updated following each Census when the data is publicly available.”*
- 3.5 Thus, for the purpose of HDT calculations, a national ratio of 2.5 students per each student-only household is used. This national ratio provides a comparator with other local calculations described elsewhere in this report, but is relevant as it is being used as a measure concerning the delivery of new dwellings.

4. Other National Research

- 4.1 There is relatively little recent research at the national level on the topic of student housing requirements. As noted above, neither the NPPF nor its accompanying PPG provide further detail on any standard measures that could be applied. This immediately suggests that a bespoke approach must be taken at the local level reflecting the specific circumstances relating to the higher and further education establishments present within the relevant locality, supported by published population projections from the Office for National Statistics (ONS) and any other relevant data that can be identified.
- 4.2 Nevertheless, there have been some research reports undertaken by property sector companies to provide, at least, a broad understanding of current student housing trends. Savills publish ‘*Spotlight – UK Student Housing*’ reports on a regular basis, and the 2014 report contained the following useful graph to show the broad trends in student accommodation between 2007/08 and 2012/13. The increasing proportion of students in private-rented accommodation was becoming evident at that time, reflecting the strong growth in the construction of Purpose-Built Student Accommodation (PBSA) by student housing providers (which very often include the universities as partners). The strong growth in PBSA has continued across the country, and it is correct to say that its construction has followed the growth in student numbers (and therefore the increasing accommodation requirements) in most university locations, including within the Canterbury City Council area.

Figure 8.12: Accommodating a Growing Student Population Nationally



Source: Savills, 2014; HESA, 2014

- 4.3 Two further, more recent, research papers by property sector companies are attached at Annexes 2 and 3, a 'UK Student Housing Update' published by Knight Frank in 2018 (Annex 2), and which identifies Canterbury district as an 'emerging market' for additional PBSA and Savills most recent 'Spotlight' report on UK Student Accommodation published in September 2020 (Annex 3).

5 **Case Studies**

- 5.1 It was an integral part of this research to draw upon good practice in other Local Planning Authorities in their approaches to calculating student accommodation requirements. In identifying potential case studies, we have sought to consider towns and cities in England that have similar or comparable characteristics to Canterbury, which can be summarised as below:

- a provincial town/city, not forming part of a major conurbation
- a comparable student population, including at least one major University
- a Housing Market Area centred on the town/city

- 5.2 We have therefore excluded the major cities, such as Liverpool, Sheffield and Manchester (which all have much larger Housing Market Areas), in selecting case study examples and we have also excluded the cities of Oxford and Cambridge, where the collegiate structure of the Universities and their extensive postgraduate work, leads to different impacts upon local housing markets.

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5.3 The Case Studies set out below are considered to provide comparable relevance to Canterbury City Council, and the summaries are drawn from the authorities' Strategic Housing Markets Assessments or equivalent documents supporting the preparation of Local Plans.

1. Exeter City Council

Document - Exeter City Council Exeter Housing Market Area Strategic Housing Market Assessment (2014)²

Exeter University has two campuses within Exeter, Streatham and St. Luke's. They are both close to the City Centre. There is also a further campus (Penryhn Campus) in Cornwall. There are approximately 19,300 students at Exeter University as a whole, with approximately 17,500 students in Exeter, of which around 13,500 (77%) are undergraduates. Calculations relating to the potential growth in the University and associated housing requirements are based only on the students at campuses in Exeter.

The University grew steadily (within Exeter) between 1974 and 2014, with the numbers of students at the University increasing from approximately 4,000 in 1973/74 to around 17,500 in 2013/14, as a result of expansion plans and programmes. There was a small reduction in the numbers of students in 2006/07 potentially resulting from an increase in university fees charged in that year. A further subsequent increase in university fees to £9,000 in 2012/13 coincided with a slight plateauing of the number of students at the university in 2012/13.

The number of full-time undergraduate students studying in Exeter grew by an annual average of 297 per year over thirty years up to 2012/13.

In 2014, the University of Exeter's University Strategic Plan set out projections which suggested potential total growth to approximately 22,000 students in 2020/21, with nearly 20,000 studying at the campuses in Exeter.

In 2014, approximately 77% of the total Exeter-based students lived elsewhere and had moved to Exeter to study. The University's projections indicated that the numbers of full-time undergraduates based at the campuses in Exeter would grow from approximately 13,400 in 2013/14 to around 15,400 in 2020/21. This equates to approximately 286 students per year.

Because university projections were not available beyond 2020/21 and because of the trend of growth over the previous thirty years, it was assumed that continued growth in full time undergraduates would

² <https://exeter.gov.uk/planning-services/planning-policy/monitoring-and-evidence-base/strategic-housing-market-assessment/>

continue throughout the projection period. This growth was based on the average student increases over a 30 year period.

Consideration was given to developing an appropriate methodology for considering student growth within future population projections for Exeter. Having compared past university growth with that anticipated in the future, it was concluded that the future expansion of the university would be a continuation of the growth trend previously recorded.

Two scenarios for the assessment of student housing requirements within the overall population projections for the SHMA were developed using the 2008 and 2011 headship housing rates. It should be noted that because students are included within the wider population projections, the standard headship rates were used. No adjustments were made to reflect the likely larger household size or occupancy of student housing, and the same vacancy rate was applied across the projection, including for student housing.

This led to the calculation of the following annual student housing requirements in Exeter applying the 2008 and 2011 headship rates:

2008 headship rates: 174 dwellings per annum (28% of the 629 total dwellings per annum in the Devon County Council trend-based projection).

2011 headship rates: 162 dwellings per annum (30% of the 549 total dwellings per annum in the Devon County Council trend-based projection).

This SHMA pre-dated the Government's introduction of a Standard Method for the calculation of Local Housing Need.

2. Guildford Borough Council

Document - Guildford Borough Council - Local Plan Topic Paper: Housing Type, Tenure and Mix (December 2017)³

Within Guildford there are a variety of further and higher education establishments, including the University of Surrey, the University of Law (established over seven locations including Guildford), Guildford College (which includes Merrist Wood College), the Academy of Contemporary Music and the School of Horticulture at RHS Wisley. These establishments offer a range of further and higher graduate courses, post-graduate courses, and specialist vocational courses.

³ <https://www.guildford.gov.uk/media/26508/Topic-Paper-2017-Housing-Type-Tenure-and-Mix>

The West Surrey SHMA Guildford addendum 2017 (prepared by Turley)⁴ considered the student population in Guildford and how it might influence the need for both student accommodation and a wider housing need. It focused on the University of Surrey (UoS) growth, which was predicted to increase by 3,800 additional full-time Guildford-based students over the Local Plan period.

The SHMA addendum estimated that, assuming 55% of UoS students will live in halls of residence on campus (2090 students) then there would be an additional maximum need for up to 428 Use Class C3 dwellings (23 dwellings per year) for 1,710 students over the Plan period to 2034. This was based on an assumption that there are 4 students per household. The identified need for student C3 housing was included within the general total housing need figures.

The Borough Council then made specific site allocations in the Local Plan at three locations to include student accommodation, but with the accommodation based upon numbers of student bedspaces rather than dwelling numbers.

This SHMA pre-dated the Government's introduction of a Standard Method for the calculation of Local Housing Need.

3. Bournemouth Borough Council

Document - Eastern Dorset SHMA (G L Hearn August 2015)⁵

There are two universities in the Bournemouth area, the University of Bournemouth (UoB) and the Arts University Bournemouth. Both are campus-based universities. The Anglo European College of Chiropractic (AECC) has its campus in East Boscombe, Bournemouth. However, paragraph 9.82 of the SHMA notes that the AECC was excluded from assessments as "*the AECC does not publish information to enable us to estimate its student numbers, nor do the proliferation of private sector English Language Schools*".

There were 20,657 postgraduate and undergraduate higher education students attending the Bournemouth universities during the academic year 2013/14. Student numbers in Bournemouth had seen steady growth in previous years, but demographic projections expected more modest population growth in student age groups over the Local Plan period.

The UoB provided accommodation for approximately 3,500 students, equivalent to about 26% of its full-time student population in 2013/14.

⁴ <https://www.guildford.gov.uk/media/19971/Final-West-Surrey-SHMA/pdf>

⁵ <https://www.bournemouth.gov.uk/planningbuilding/PlanningPolicy/Other-Planning-Documents/Strategic-Housing-Market-Assessment.aspx>

The Arts University Bournemouth provided accommodation for around 500 students, equivalent to around 17% of its full-time student population in 2013/14. The universities did not report any new student accommodation becoming available in the foreseeable future.

The report noted that “*there is a sizeable student housing market in Bournemouth and to a less extent in Poole. However, the evidence suggests that demand for private rented sector multi-occupied student homes is waning*”. In calculating the future housing requirement for students, as part of the Objectively Assessed Housing Need (OAHN), the SHMA assumed a ratio of six student bedspaces to be equivalent to one dwelling, with all accommodation expected to be provided by the private sector.

This SHMA pre-dated the Government’s introduction of a Standard Method for the calculation of Local Housing Need.

4. City of York Council

Document – Strategic Housing Market Assessment - June 2016 (GL Hearn)⁶

The City has two universities, the University of York (UoY) with an off-centre campus and the York St John University with a city centre campus.

The UoY had over 16,000 full and part-time students at 2016. York St John University had around 6,000 students at 2016.

According to Census data there were 22,269 students aged over 16 living in the City of York in 2011. The number of students in York had increased by 7,464 (50.4%) persons between 2001 and 2011.

Excluding part-time students and those students aged 16 and 17 (principally sixth form students) there were 19,002 full time students in York in 2011. This represented an increase of 7,435 students (64.3%) on the equivalent number recorded in the 2001 Census.

By 2016, the growth in student numbers in York was slowing, and numbers of part-time and postgraduate students were falling. In part, this is attributed to increases in tuition fees.

Of the 22,269 students aged over 16 in York based on 2011 Census data, 8,153 students (36.0%) lived in all-student households (likely to be in the private rented sector), 5,561 students (24.5%) lived with parents and

⁶ <https://www.york.gov.uk/downloads/file/1530/sd051-city-of-york-council-strategic-housing-market-assessment-shma-june-2016->

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5,142 students (22.7%) lived in communal establishment e.g. student halls of residence.

The outputs of the SHMA on assessing student housing requirements were based upon far more detailed qualitative research than is generally the case, including detailed surveys of the local housing market, including research with local estate agents and private sector landlords, research with student representatives and also with the Universities.

It was noted that some 2,500 bedspaces had been provided in PBSA schemes across the city prior to 2016. However, this had not reduced demand for traditional private sector shared housing but had been largely occupied by international students, due to costs being prohibitive for domestic UK students. This had meant that the PBSA schemes had, in some situations, not been fully let.

UoY suggested that its prospects for future growth were somewhat weaker than that experienced in the previous decade.

Taking account of all the trends identified through this qualitative research, but principally a slower rate of projected university growth, and some areas of decline in student numbers, the SHMA concluded that there was no requirement to increase the overall housing need over the Local Plan period on the basis of student growth.

This SHMA pre-dated the Government's introduction of a Standard Method for the calculation of Local Housing Need.

5. Norwich City Council

Document - Central Norfolk Strategic Housing Market Assessment - June 2017 (Opinion Research Services)⁷

There are four higher and further education establishments in the Norwich area, the University of East Anglia (UEA), with an off-centre campus, the Norwich University of the Arts, the City College and Easton College.

UEA has a total of over 14,500 students, with around 90% of UK national students being full-time (academic year 2016-17) and the remainder being part-time. UEA has 4,300 bed spaces on campus. The Norwich University of the Arts has 1,900 full-time students, whilst the City College has 11,000 full and part-time students and Easton College has 300 students.

Full-time student numbers grew by around 4,200 over the period 2005-15 at the University of East Anglia and Norwich University of the Arts, at an

⁷ https://www.norwich.gov.uk/downloads/file/3993/shma_-_june_2017

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average of around 420 students per annum. The SHMA therefore assumed that the student numbers in Central Norfolk would continue to rise by 420 per annum for the 21 years from 2015 onwards.

At the 2011 Census, there were a total of 1,471 all-student households in Central Norfolk (almost all in Norwich) each containing at least 2 students and no one who was not a student. These contained a total of 6,143 students. There were another 781 students living on their own, again primarily in Norwich. Therefore, there were 6,924 students in households only containing students and a total of 2,252 households. Therefore, the average household size for a student household in the 2011 Census in Central Norfolk was just over 3 students per household.

The SHMA household projections assumed that the number of students living in communal establishments (including university halls of residence and student housing provided by private sector providers) would remain broadly constant over the Plan period 2015-36.

The SHMA therefore concluded that student numbers in the Central Norfolk HMA would grow by around 420 per annum each year and that there is no increase in student bedspaces, so all students will occupy dwellings.

However, if more student bedspaces are to be provided in Central Norfolk then this will reduce the need for other forms of housing.

The SHMA notes that "for a local planning authority to be able to count student accommodation as part of the land supply calculation, they must assess the impact of students on their housing requirement, and, also, demonstrate the impact of new student accommodation on the wider housing market. It is clearly advantageous for students to live in purpose-built accommodation, rather than in dwellings which could be occupied by non-student families."

In the case of Central Norfolk, students have been counted in OAN figures provided that the growth in student numbers is below 420 per annum and therefore student bedspaces can be counted as part of the housing land supply on the basis of around 3 bedspaces equalling one dwelling. Each 3 bedspaces will effectively lead to one vacant property in the private housing stock which can be occupied by another household.

Subsequent to the SHMA, the City Council published in November 2019 a very useful evidence and best practice note on PBSA in Norwich, and a copy of this document is attached at Annex 4 to this report.

This SHMA pre-dated the Government's introduction of a Standard Method for the calculation of Local Housing Need.

6. Reading Borough Council

Document - Berkshire (including South Bucks) Strategic Housing Market Assessment - February 2016 (GL Hearn)⁸

The University of Reading (UoR) is the only higher education establishment within the Reading Borough area. There is a campus of Imperial College (University of London) at Sunninghill within the Royal Borough of Windsor and Maidenhead, but this is not within the core Housing Market Area of Reading.

In 2016, UoR had 13,435 students, which was some 2,500 students less than in 2008/09. This decline was driven by a significant decline in part-time undergraduate numbers, and the University's strategy of focussing on full-time courses.

After 2010/11 the numbers of full-time undergraduate students continued to rise, but during the period 2001-2011 there had been a fall in the numbers of students living in the UoR halls of residence at Reading and Wokingham. Over the same period, the number of students living in private all-student housing increased by around 1,250 persons. There is believed to be a significant number of students who commute from outside Reading to study at UoR, and/or who live at their parents' home.

Between 2001-2013 the number of overseas students at UoR increased from 2,570 to 3,220 – an increase of 650 students (25%). This category of students is more likely to be accommodated within UoR halls of residence.

Between 2001/02 and 2007/08 the numbers of undergraduate students in Reading were fairly flat over the period 2001-2008, while postgraduate numbers fell slightly. After 2008, the decline in student numbers was largely amongst UK-born students studying part-time.

The UoR is only forward planning for a period of five years due to current volatility in the higher education sector and the nature of its funding. Over the period 2016-2020, the growth in student numbers at UoR was expected to increase by around 23% (2,960 students), with approximately equal growth in both undergraduate and postgraduate student numbers. Around 30% of this growth was expected to be from overseas students who tend to reside in Halls of Residence.

Based upon these growth projections, the SHMA concluded that there is no requirement to increase the overall housing need over the Local Plan period on the basis of student growth, as there was an increased supply of

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[https://images.reading.gov.uk/2019/12/Berkshire Strategic Housing Market Assessment Feb 2016-1.pdf](https://images.reading.gov.uk/2019/12/Berkshire_Strategic_Housing_Market_Assessment_Feb_2016-1.pdf)

PBSA in the planning pipeline in Reading, and overall student numbers were still not exceeding previous peak levels. Furthermore, UoR provides accommodation for 5,000 students on or around their campus, which is a higher proportion than at many other universities.

This SHMA pre-dated the Government's introduction of a Standard Method for the calculation of Local Housing Need.

- 5.4 The six Case Studies described above, each from a town or city that we consider comparable to the Canterbury City Council area in respect of the nature of higher and further education establishments within the town/city and the broad impacts of the student population on the relevant Housing Market Area, illustrate the range of approaches that have been taken towards the calculation of a student housing requirement as part of the overall housing requirement to be set out in emerging (and in some cases now adopted) Local Plans. Each approach is a bespoke methodology and calculation based upon local circumstances, and we assess the robustness of the various approaches in Section 6. However, it must be noted that all of the SHMA's considered as part of these Case Studies pre-dated the introduction of the Standard Method for calculating Local Housing Need, and that the Canterbury City Council Local Housing Needs Assessment will need to be based upon that method, including its calculation of any specific need for student housing in its emerging Local Plan.

6. Assessment

- 6.1 The six Case Studies described above show four different broad approaches and methodologies to calculating student housing requirements in SHMAs undertaken across a period between 2014-2017, to inform emerging Local Plans, as follows:

- a) a projection based upon trend-based student growth, adjusted to take account of latest population and household projections for the Housing Market Area.

(Examples - Exeter, based upon student growth over the previous 30 years, and leading to 162-174 dwellings p.a. to be provided over the Local Plan period for the projected growth in student numbers; Norwich, based upon student growth over the previous 10 years, and also informed by 2011 Census data and SHMA household projections, leading to no additional specific housing requirement for growth in student numbers).

- b) future student accommodation requirements based upon bedspace ratios related to projected growth in student numbers.

(Examples - Guildford, with a ratio of four student bedspaces per household, leading to a requirement of 23 dwellings p.a. to be provided

over the Local Plan period; Bournemouth, with a ratio of six student bedspaces equivalent to one dwelling, but with more modest growth in student numbers being projected, no specific housing requirement was identified to meet student requirements). Note that the MHCLG bedspace ratio (2.5 students per student-only household) is significantly different to the ratios identified above.

- c) future student accommodation requirements based upon deep qualitative research of the current student housing market in the locality.

(Example – York, leading to no additional specific housing requirement for student growth, also in light of weaker growth projected by the principal university)

- d) an assessment largely based upon a study of the fluctuations in the principal university's student numbers, which reflected the university's own strategies rather than any other significant factor, and the impacts upon the take-up of accommodation across the area. Essentially, it is a trend-based approach but very much tailored to the university's growth plans, and their impacts upon student numbers.

(Example – Reading, including analysis of the planning pipeline, leading to no additional specific housing requirement for student growth in the Local Plan)

- 6.2 What is clear from these differing approaches is that trend-based growth over a longer period, which was the previous 30 years in the case of Exeter, will encompass the decades (1980s/1990s) of major growth in the higher education sector and therefore project a continuing and broadly similar rate of future growth in student numbers, adjusted to take account of recent student household headship projections. A trend-based approach over a shorter timeline, the previous 10 years in the case of Norwich, can be more closely related to the local housing market conditions over that period and then aligned with SHMA population and household projections.
- 6.3 There are clear differences between the examples using student bedspace ratios, but the SHMA outputs reflect the different growth strategies of the universities concerned, major growth in the case of the University of Surrey at Guildford, more modest growth in the case of Bournemouth University.
- 6.4 The detailed qualitative research undertaken at York enabled the consultants to develop a very good understanding of the local student housing market, including research with the student population. There is nothing to suggest that this approach is any less robust than the more widely used trend-based and bedspace ratio approaches.
- 6.5 Finally, an approach which is closely aligned with the strategies of the

principal university, as at Reading, will clearly largely reflect that university's specific growth plans. However, at Reading, it has also been able to take account of the fairly significant fluctuations in student numbers that occurred in previous years, such that the university is only now returning progressively to the peak levels of student numbers seen in 2008/09.

- 6.6 Each of these approaches is a bespoke response, with an appropriate methodology, to address the specific local circumstances, but they clearly meet the NPPF requirements and PPG guidance in providing a detailed and robust understanding of the requirements for student housing.

7. Conclusions

- 7.1 This research has shown that there is not a prescribed 'template' for the calculation of student housing requirements as part of a SHMA, and that in each of the case studies described above, and in other research that we have undertaken on the subject, a bespoke approach is being taken according to the specific circumstances of the relevant Housing Market Area (HMA).
- 7.2 Nevertheless, there are some key baseline data requirements for a robust understanding of those circumstances, to enable a good assessment to be made of the potential housing requirements. These are:
- an analysis of the current student population in the higher education establishments within the HMA, and critically how and where they are presently accommodated – and whether there are any significant in-commuting flows by students from outside the district
 - an analysis of the past trends affecting student numbers in the HMA, probably for at least the past 10 years, and whether there have been fluctuations in those trends, for example by increases in tuition fees or significant changes to the structure of the universities' academic courses (affecting both undergraduates and postgraduates)
 - an analysis of the universities' growth plans, in terms of student numbers, for as far ahead as possible, although it seems that it is rarely possible to project such growth beyond about five years ahead due to other factors affecting the universities' plans
 - an analysis of the most recent Census data (2011) alongside the latest available population and household projections, in order to 'test' the accuracy of the data obtained from the above analyses – in the research that we have undertaken there has been a close relationship between such projections and locally-sourced data
 - a good understanding of how many overseas students are attending the higher education establishments, and how they are accommodated – and the trends affecting the intake of such students
 - every effort must be taken to avoid any potential double-counting of accommodation requirements.

- 7.3 At the present time, we have seen evidence of increased volatility within the higher education sector in terms of student enrolments. There have been reductions in the numbers of overseas students entering the UK during the past year, due largely to the ongoing Coronavirus pandemic and the impacts of Brexit. At some higher education establishments there is currently an over-supply of student accommodation, chiefly within halls of residence and PBSA, as more students are undertaking on-line study from their homes. Although this situation should be viewed as temporary, there may be longer-term consequences arising from these events. Such consequences will need to be closely monitored.
- 7.4 The housing requirements of students in Further Education can very largely be discounted as the majority of 16-18 years students continue to live at home. However, the local circumstances should be checked, as some colleges do have specialist courses attracting students from further afield.
- 7.5 To a large extent, the growth of PBSA has 'absorbed' the growth in higher education student numbers over the past 20 years. Many universities are direct partners and/or stakeholders in the providers of PBSA. The continuing growth in the PBSA market and its impacts upon the wider provision of student accommodation, including other accommodation in the private-rented sector, within Canterbury district will require closer study. Indeed, some of our research shows that UK-born students continue to prefer to live in older housing within the private-rented sector because of lower rents. Such local circumstances regarding the occupation of PBSA need to be understood, for example whether it is mainly occupied by overseas students, in order to avoid making any unsafe projections about the number of existing dwellings that might be returned to the general housing market (and therefore with a net reduction in overall housing requirements) as a result of continuing PBSA construction. As shown at York, this probably requires some qualitative research with the student letting agencies and providers, and potentially also with the student community.
- 7.6 PBSA continues to be an attractive sector within the development industry, and Annexes 2-4 show that this trend is unlikely to abate in the near future. Indeed, in many cases, it represents a sustainable form of development, often involving the redevelopment of brownfield sites close to town and city centres and supporting local shops and services. An understanding of how many PBSA schemes are presently in the local planning pipeline is required, and of course site allocations in an emerging Local Plan can be made specifically for PBSA development, as at Guildford.
- 7.7 Our advice to the City Council is that an approach based upon the baseline requirements set out in paragraph 7.2 above, and then developed into a bespoke Canterbury methodology to the apparent student housing requirements (if any) for the emerging Local Plan period will be robust and will contribute to the robustness of the Local Housing Needs Assessment and the Local Plan. We make no recommendations for the

adoption of any specific methodology described in the Case Studies, as each was specific to the local circumstances of the relevant HMA.

Derek Stebbing

Derek Stebbing
31 March 2021

Annexes

1. PAS Project Brief (issued July 2020)
2. UK Student Housing Update, Knight Frank (2018)
3. '*Spotlight Report on UK Student Accommodation*', Savills (2020)
4. Norwich City Council – "*Purpose-built student accommodation in Norwich: Evidence and best practice advice note*" (November 2019)