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# Greater Nottingham & Ashfield Housing Needs Assessment

Technical Paper: Student Housing Needs

Iceni Projects Limited on behalf of  
Ashfield, Broxtowe, Gedling, Erewash,  
Nottingham and Rushcliffe Councils

ICENI PROJECTS LIMITED  
ON BEHALF OF ASHFIELD,  
BROXTOWE, GEDLING,  
EREWASH, NOTTINGHAM  
AND RUSHCLIFFE  
COUNCILS

February 2020

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Greater Nottingham & Ashfield  
Housing Needs Assessment



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## 1. INTRODUCTION

- 1.1 The Greater Nottingham Planning Partnership (“GNPP”) comprising Broxtowe Borough Council, Erewash Borough Council, Gedling Borough Council, Nottingham City Council and Rushcliffe Borough Council; as well as Ashfield District Council, have commissioned Iceni Projects (“Iceni”) to prepare a Housing Needs Assessment.
- 1.2 The Housing Needs Assessment is being prepared for the Greater Nottingham and Ashfield area in order to support the preparation of Local Plans looking ahead to 2038; and to provide evidence to support housing market interventions and prospective future funding bids.

### **Student Housing Needs Technical Paper**

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- 1.3 This initial technical paper has been prepared in advance of the main Housing Needs Assessment in order to inform decision-taking in Broxtowe Borough Council on student housing needs which includes consideration of concentrations of students and consequently Houses in Multiple Occupation (“HMOs”) and how this should be addressed in policy terms.

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## 2. STUDENT HOUSING NEEDS

2.1 This section considers the needs of students with a focus on Broxtowe Borough Council.

### **The Existing Profile of Student Housing Need**

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2.2 The NPPF is clear that the needs of students (and other groups within the housing market) should be assessed and reflected in planning policies.

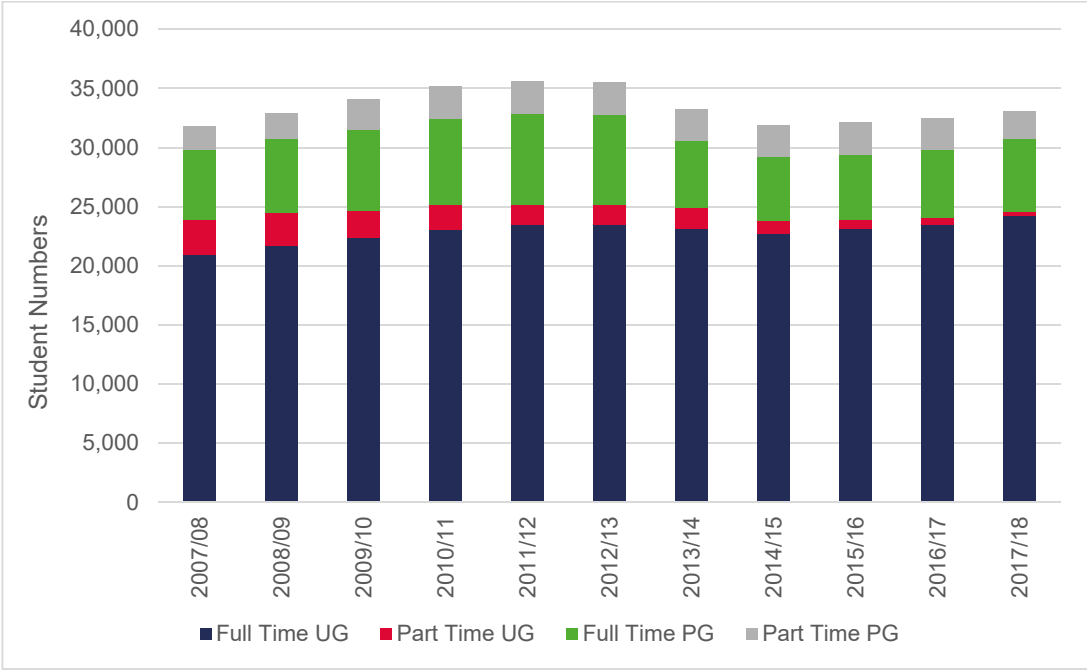
2.3 Across the study area at the point of the 2011 Census, there were around 62,000 full time students aged 18 and over with around three quarters of these students living in Nottingham City.

2.4 The area has two higher education (HE) establishments which are relevant to this assessment - the University of Nottingham and Nottingham Trent University - as well as a number of further education colleges. However, the data allowing us to track trends in student numbers year-on-year for further education establishments is not consistently available. It is HE students which principally impact on the housing market, and therefore the assessment focuses on these.

2.5 We have access to data allowing us to track trends in student numbers for the University of Nottingham and Nottingham Trent University from the Higher Education Statistics Agency ("HESA"). Drawing on data from the HESA, the Figure below sets out the pattern of growth over the last 10 years from 2007/08 to 2017/18 across the two Universities.

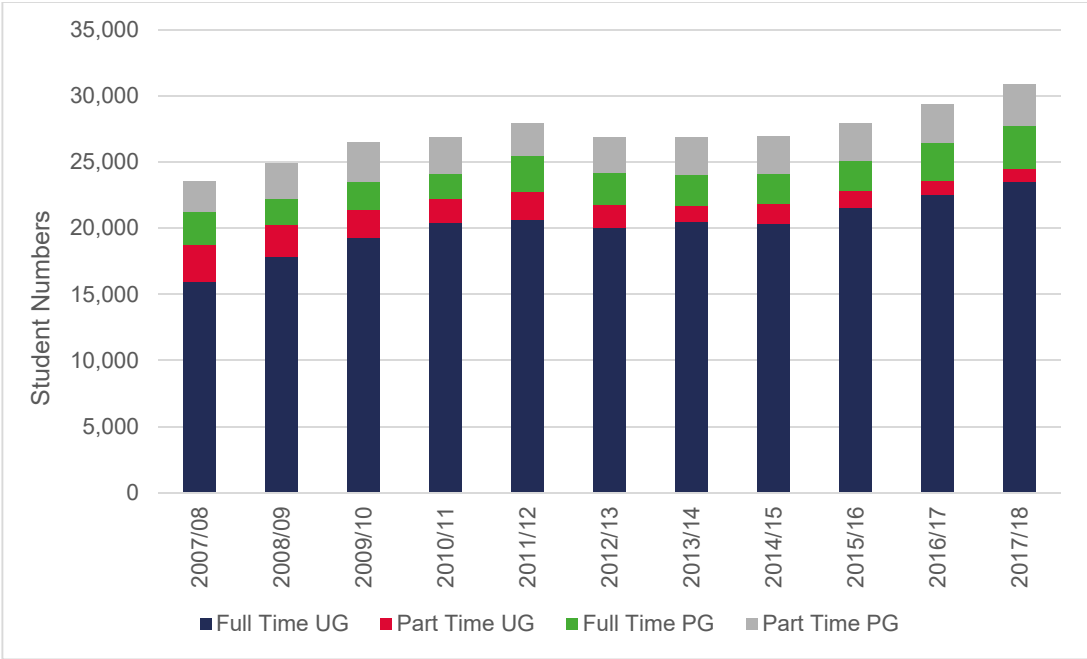
2.6 As of 1<sup>st</sup> September 2017, the University of Nottingham had 33,100 full and part-time UG and PG students. Nottingham Trent University had an equivalent 30,890 students; which is the highest total number of students at the University in the last decade.

**Figure 2.1: Profile of Student Population at University of Nottingham**



Source: HESA 2019

**Figure 2.2: Profile of Student Population at Nottingham Trent University**



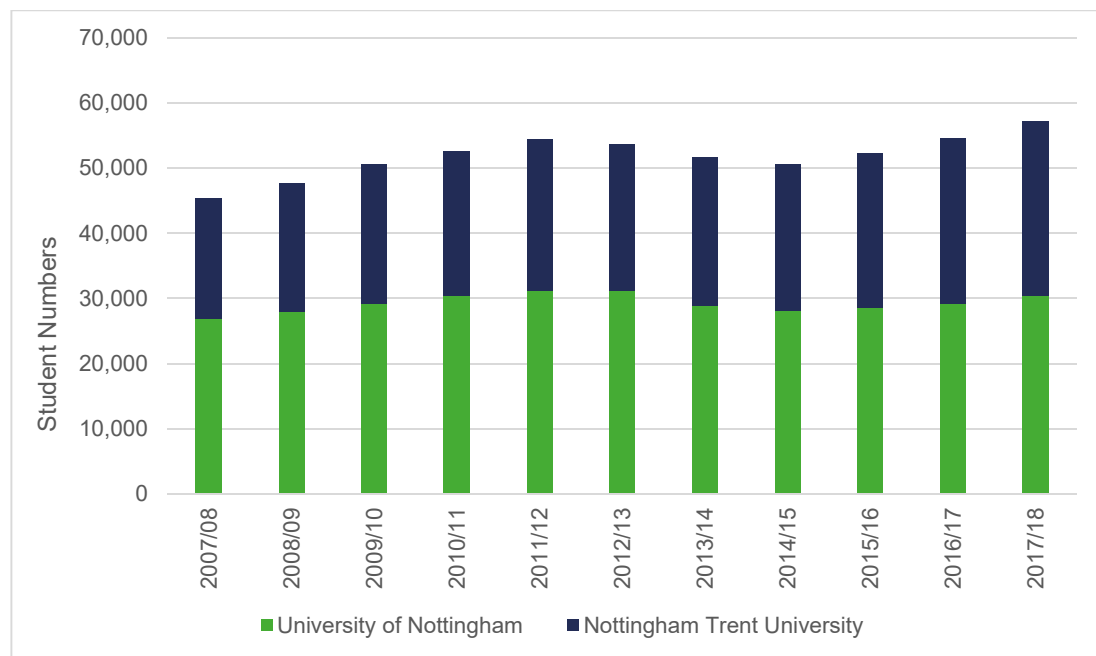
Source: HESA 2019

2.7 At the University of Nottingham, the number of full time undergraduates grew over the 2007-17 period by 3,250 students whilst the proportion of part time undergraduates fell by 2,515 students. Across the ten year period, the number of postgraduate students increased modestly.

2.8 At Nottingham Trent University, the number of full time undergraduates increased by a substantial 47% over the ten year period; whilst the number of part-time undergraduates fell by around 1,750 students. The growing number of full-time students will have had a greater impact on housing across the study area.

2.9 Housing needs arise principally as a result of full-time students (with those studying part time typically also working relatively locally or living with parents). As of 1<sup>st</sup> September 2017, there were 30,405 full time students at the University of Nottingham and 26,750 FTE students at Nottingham Trent University. The trend in full time students is shown in the Figure below.

**Figure 2.3: Trends in FTE Higher Education Students in Greater Nottingham & Ashfield**



Source: HESA 2019

2.10 It is notable that both establishments experienced a fall in the number of full time students following the introduction of an increase in student fees by the Government in 2010/11; however, student numbers have increased again in recent years; with FTE student numbers at Nottingham Trent University now at their highest level over the last 10 years.

2.11 At 1<sup>st</sup> September 2011, there was a total of 54,515 full time students at the University of Nottingham and Nottingham Trent University; suggesting that the two Universities accounted for around 88% of all full time students aged 18 and over at the point of the 2011 Census. By 2017, the number had risen by 5% to 57,155.

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## The Profile of Accommodation and Concentrations of Houses in Multiple Occupation

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- 2.12 At the point of the 2011 Census, there were around 62,000 full time students aged 18 and over across the study area. The Table below sets out a breakdown of this by age and authority area; demonstrating that of the 62,000 students, around 46,000 (74%) were based in Nottingham City. The second largest concentration of students was in Rushcliffe (4,563) followed by Broxtowe (4,412).

**Table 2.1 Profile of Full Time Students Aged 18 and Over**

Age	Ashfield	Broxtowe	Erewash	Gedling	Notts City	Rushcliffe
Aged 18-19	1,124	1,313	1,102	1,228	13,381	1,651
Aged 20-24	635	1,698	650	790	25,597	2,216
Aged 25 and Over	518	1,401	591	603	6,943	696
<b>Total (No.)</b>	<b>2,277</b>	<b>4,412</b>	<b>2,343</b>	<b>2,621</b>	<b>45,921</b>	<b>4,563</b>

- 2.13 Across the study area, where students live varies markedly, which is likely to partly reflect the nature of students living in each of the authority areas. For instance, at the point of the 2011 Census, around 70% of the students living in Gedling lived with parents; but only 36% did so in Broxtowe and only 10% did so in Nottingham City. The Table below sets out the profile of full time students and their accommodation across the authority areas at the last census.

**Table 2.2 Profile of Full Time Students Aged 18 and Over by Accommodation Type (%)**

Accommodation Type	Ashfield	Broxtowe	Erewash	Gedling	Notts City	Rushcliffe
Living with Parents	68%	36%	66%	70%	10%	36%
University Communal	4%	0%	0%	0%	24%	13%
Other Communal	0%	0%	2%	0%	4%	0%
All Student Household	4%	31%	7%	7%	44%	33%
Living Alone	3%	4%	4%	4%	5%	2%
Other	21%	29%	21%	20%	13%	16%
<b>Total (No.)</b>	<b>2,277</b>	<b>4,412</b>	<b>2,343</b>	<b>2,621</b>	<b>45,921</b>	<b>4,563</b>

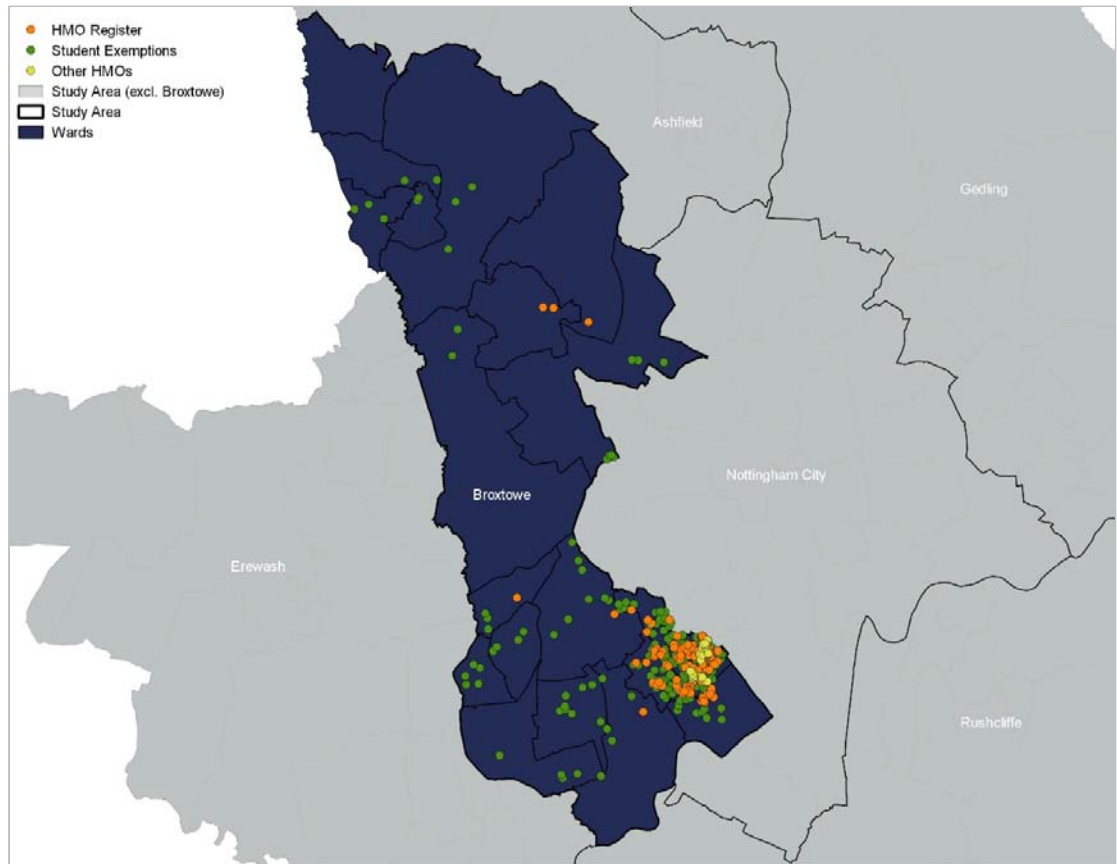
Source: 2011 Census

- 2.14 Beyond those students living at home, as the analysis shows, 31% of students aged 18 and over lived in an all student household in Broxtowe Borough; 44% in Nottingham City and 33% in Rushcliffe. It is notable that students residing in this form of student accommodation typically live in HMOs; and in some instances, the number of HMOs can become concentrated in particular areas.



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- 2.15 It is particularly notable that around 90% of students living in HMOs in Broxtowe Borough were concentrated in the Beeston ward. This area is located at the western end of the University of Nottingham's Park Campus.
- 2.16 Although it is not uncommon for areas with a high population of students to have a number of all student HMOs, it is important that a mix of residential accommodation is maintained within the neighbourhood. In particular:
- Student populations are transient and thus concentrations of HMOs can create relatively transient communities of people with a high population turnover. This can, in some circumstances, lead to issues of environmental upkeep and fly-tipping.
  - Areas with concentrations of HMOs are those in which there is an above average proportion of properties owned by landlords rather than owner occupiers. This can result in reduced investment in the upkeep of properties, which can lead to a general downward trend in neighbourhood quality.
  - Growth in student HMOs within an area can inhibit the availability and supply of homes for other groups within the population, such as for families.
- 2.17 Through discussions with local lettings agents, it is noted that Beeston is known for higher quality compared with areas such as Lenton. Letting agents found that the area continues to maintain a balance of housing with a greater focus towards families, as well as young professionals and students. One letting agent also noted that "there has been a recent [i.e. last 5 years] surge of investment in the Beeston area to upgrade the standard of shared student housing". Agents also highlighted that a number of local businesses benefit from the number of young professionals and students in the area.
- 2.18 Nevertheless, where concentrations of student housing exist, it may be appropriate to consider introducing an Article 4 Direction to remove permitted development rights for the change of use from a dwelling house (Use Class C3) to an HMO (Use Class C4) in order to ensure a balance of housing is maintained moving forward; and communities remain mixed but balanced.
- 2.19 The Figure below shows the spread of HMOs as well as homes subject to a student exemption for Council Tax across Broxtowe Borough. There is a particular concentration shown in the Beeston Central ward; as well as smaller numbers in the Beeston West, Beeston North and Beeston Rylands wards.

Figure 2.4: Concentration of HMOs in Broxtowe Borough

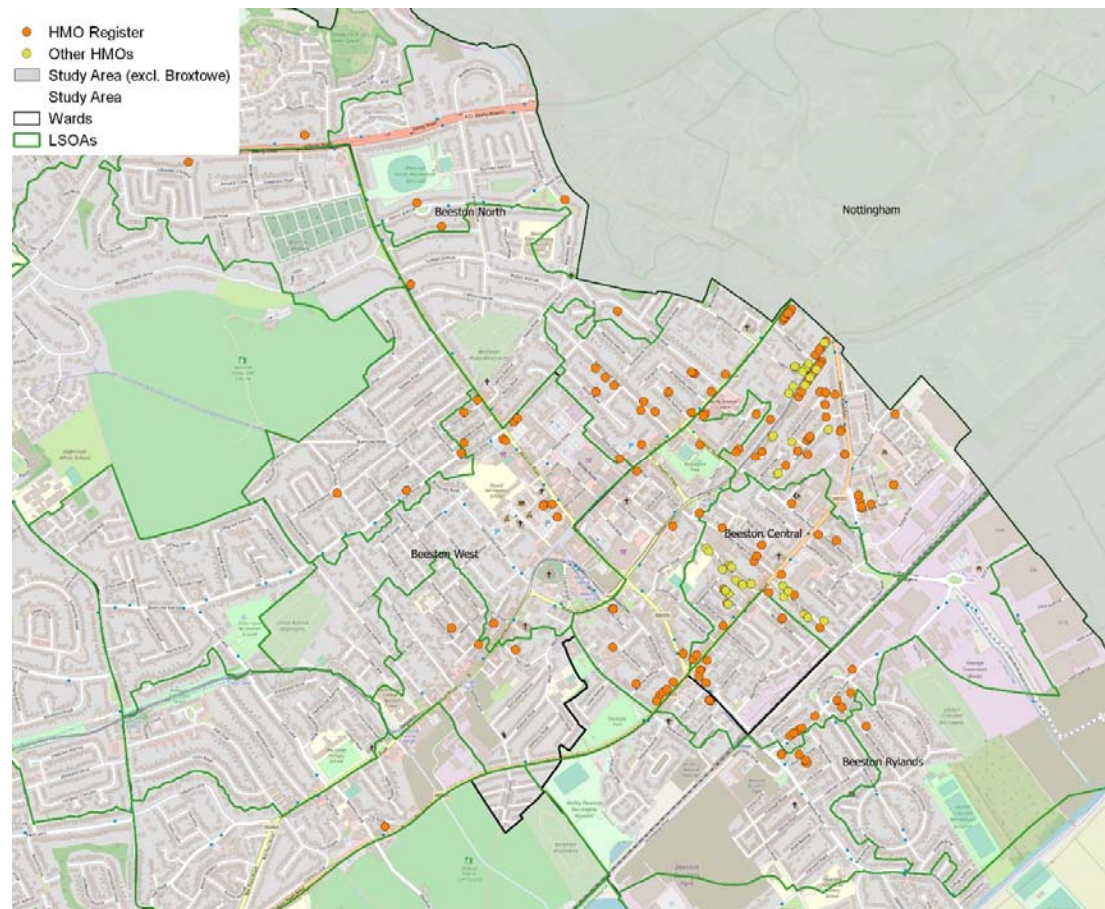


2.20 Taking the 2011 Census household profile for these four wards as a basis, with a total of 9,347 households at 2011, the number of HMOs at 142 would represent 1.5% of all households if applying the 2018 HMO figures to the Census base. This does not suggest there is a substantial concentration of HMOs at a ward-level.

2.21 The majority of the licensed HMOs are situated in the Beeston Central ward. As at 2018, 69% (equal to 98 HMOs) of Beeston's HMOs are situated in the Beeston Central ward. However, taking the number of households in Beeston Central at 2,180 at the point of the 2011 Census; we note that this would only represent 4.5% of all households.

2.22 However, it is important to look at the issue beyond a ward-level. The Figure below shows the position at a smaller scale across the Beeston wards and LSOAs with a focus on particular streets. This shows that there are clusters of HMOs in certain areas of the Beeston Central ward including along Lower Road and Broadgate, which are all adjacent streets to University Boulevard and in close proximity to the University of Nottingham. There are also clusters in close proximity to Beeston Railway Station, with clusters along Queens Road West (Beeston Central) and Lilac Grove (Beeston Rylands).

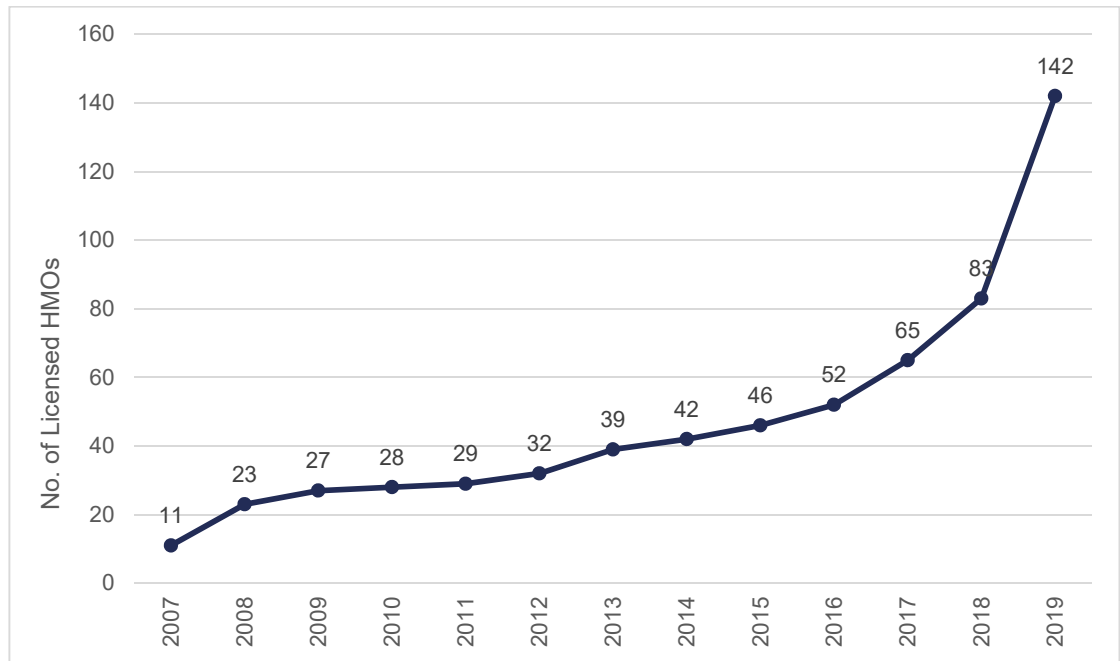
Figure 2.5: Concentration of HMOs in Beeston Wards



2.23 In some instances, particularly around areas close to the University of Nottingham's Park Campus along Broadgate and Lower Road, there are concentrations of 7 to 9 HMOs within a single row or block.

2.24 The Figure below shows how the number of new licensed HMOs has grown year-on-year since 2007 in the Beeston area to reach a total of 142 licensed HMOs at as 2019. The numbers elsewhere in the Borough are modest. This data is drawn from the public register of licensable HMOs, which is maintained by the Council in accordance with Section 232 of the Housing Act. It points to rapid recent growth.

Figure 2.6: Licensed HMOs in Beeston, Broxtowe



Source: Public Register of Licensable HMOs

- 2.25 The number of licensed HMOs in the Beeston area has grown by 238% over the last five years from 42 to 142 HMOs which is clearly substantial growth in percentage terms; with an additional 90 HMOs licensed over the last 3 years. This is clearly significant in relative terms.
- 2.26 The Housing Nottingham Plan (i.e. the City's Housing Strategy) has placed particular importance on making new student developments sufficiently attractive and affordable for students in all years of study to be persuaded that the purpose-built market is a better option than shared housing in communities.
- 2.27 Nottingham City has an estimated 7,261 HMOs which includes licensed, known and suspected. Of the 2,147 HMOs with a mandatory license and 4,124 HMOs with a non-mandatory license, 581 (equal to 27%) and 967 (equal to 23%) are located in the Lenton and Wollaton East ward of Nottingham respectively. This ward directly adjoins the Beeston West and Beeston Central wards; and there are particular concentrations on streets around these areas outside of the Broxtowe boundary.
- 2.28 Although the evidence suggests that as a proportion of all households, the total number of licensed HMOs across the four Beeston wards where HMOs are concentrated is relatively low at a ward-level; as is shown in Figure 3.5, there are notable clusters and concentrations forming on particular streets in Broxtowe – principally on:

- Lower Road, Beeston Central;
- Broadgate, Beeston Central;
- Salisbury Street, Beeston Central;
- Queens Road, Beeston Central; and
- Lilac Grove, Beeston Rylands.

2.29 In order to ensure that this area remains mixed but balanced; it is considered that there is sufficient evidence to justify the Council introducing an Article 4 Direction covering these streets. This would mean that planning permission will be required for a change of use from a C3 (dwelling house) to a Class C4 (small house in multiple occupation - HMO).

2.30 However, it is recognised that by defining an Article 4 Direction too narrowly, there is a risk that student concentrations could simply spread to adjoining streets. The Council should take this into account in drawing the boundary to be covered by the Article 4 Direction within the Beeston area.

### **Purpose-Built Student Accommodation**

2.31 Whether HMO numbers grow over time will be influenced by:

- Future trends in student numbers at the universities;
- Delivery of purpose-build student accommodation; and
- Student decisions regarding the balance between accommodation cost and quality.

2.32 The number of schemes being built out or coming forward through the planning process for purpose-built accommodation is significant. The Table below sets out schemes approved or pending consideration from 1<sup>st</sup> January 2017 onwards and shows that there are 342 bedspaces currently under construction or subject to determination in Broxtowe.

**Table 2.3 Purpose-Built Student Accommodation**

Planning Application Address [Ref]	Proposal	Status
1 Queens Road East, Beeston [19/00799/FUL]	Student accommodation building providing 32 bedrooms.	Pending Consideration
Neville Sadler Court, Beeston [18/00607/FUL]	Change of Use of 28 flats to student accommodation (17 cluster flats) and construction of 3 cluster flats (providing 83 bedspaces in total)	Approved and Under Construction

Dagfa House School, Broadgate, Beeston [17/00607/FUL]	Student accommodation providing 136 bedspaces.	Approved and Under Construction
Dagfa House School, Broadgate, Beeston [17/00608/FUL]	Student accommodation providing 91 bedspaces following demolition of school buildings. Additional to 17/00607/FUL.	Approved and Under Construction
<b>Total Bedspaces:</b>		<b>342</b>

- 2.33 As the number of bedspaces being brought forward in Broxtowe through purpose-built development and prospective planning applications would suggest, there is demand outside of traditional shared accommodation and HMOs in favour of purpose-built accommodation.
- 2.34 Nottingham City is also seeing substantial growth in the development of purpose-built student accommodation with 6,488 bedspaces purpose-built dwelling delivered between 1<sup>st</sup> April 2011 and 31<sup>st</sup> March 2018<sup>1</sup>. The latest Purpose Built Student Accommodation Vacancy Survey for 2018/19 recorded a vacancy rate of only 0.3% in Nottingham City which has fallen from 1.6% in 2014/15.
- 2.35 Furthermore, Nottingham City Council expects around 5,500 bedspaces to come forward through pipeline development schemes in the coming years<sup>2</sup>.
- 2.36 Overall, considering the scale of recent purpose-built provision in Nottingham City coupled with the substantial level of pipeline supply; there is clearly a moving shift away from HMOs to purpose-built accommodation in the City Centre. Coupled with Broxtowe's supply, IcenI consider that this has the potential to have a notable impact on the quantum and concentration of HMOs in and around the Beeston area.
- 2.37 Through discussions with local letting agents, we also note that one of the main reasons student numbers have increased in Beeston is due to the lack of development in areas such as Lenton and Dunkirk – which students have historically preferred; however, further provision of purpose-built accommodation could help to reverse this trend.

### **Future Student Housing Needs**

- 2.38 In order to understand how the profile of Beeston and other surrounding areas where students reside are likely to evolve over time, IcenI have engaged directly with the two Universities in

<sup>1</sup> Nottingham City Council Annual Monitoring Report (March 2019): Appendix 4

<sup>2</sup> Nottingham City Council Annual Monitoring Report (March 2019): Appendix 5

Nottingham to discuss the likely future trends in student numbers and the associated influence of this change on local dynamics and the balance of existing communities.

- 2.39 The University of Nottingham has provided us with a breakdown of its recruitment targets over the five year period to 2024/25; however, it should be noted that these are subject to change and are simply a broad prediction.
- 2.40 The results of this are shown in the Table below; indicating that total student numbers enrolling at the University for the first time is expected to grow at an average compound growth rate of 0.7% per annum or around 100 students per annum on average.

**Table 2.4 University of Nottingham Recruitment Targets by Level of Study**

Level of Study	2020/21	2021/22	2022/23	2023/24	2024/25
Undergraduate Home/EU	7,048	7,159	7,200	7,208	7,216
Undergraduate International	1,530	1,513	1,543	1,557	1,557
Postgraduate Taught Home/EU	1,640	1,703	1,754	1,758	1,768
Postgraduate Taught International	3,196	3,180	3,269	3,332	3,342
Postgraduate Research Home/EU	613	621	628	629	629
Postgraduate Research International	362	362	362	364	364
<b>Total</b>	<b>14,389</b>	<b>14,538</b>	<b>14,756</b>	<b>14,838</b>	<b>14,896</b>

Source: University of Nottingham

- 2.41 Nottingham Trent University has been unable to provide us with an indication of its recruitment targets; however, owing to the location of Nottingham Trent University in comparison to the University of Nottingham (situated adjacent to Beeston), growth in student numbers is less likely to have a direct impact on the character of the area and mix of housing which we are specifically considering in this section.
- 2.42 Nevertheless, it is possible to review trends in growth of full-time student numbers over a five year period at the University by way of sensitivity analysis to understand the number of bedspaces which could be required. Drawing on the HESA data set out in Figure XX, over the period from 2012/13 to 2017/18, full-time student numbers increased by 4,250 which is equal to an average of 850 per annum on average.
- 2.43 Drawing the above together, over the next five years, there is likely to be an increase of around 4,750 full-time students requiring accommodation within and around Nottingham with the vast majority of this arising from Nottingham Trent University. This is set against pipeline supply of around 5,850 purpose-built student accommodation (“PBSA”) bedspaces which are expected to come forward across Nottingham City and Broxtowe in the coming years.

**Table 2.5 Indicative Student Growth vs PSBA Pipeline supply**

Level of Study	2020/21	2021/22	2022/23	2023/24	2024/25
University of Nottingham	100	100	100	100	100
Nottingham Trent (Trend-Based)	850	850	850	850	850
<b>Student Growth (2020/21 – 2024/25)</b>	<b>4,750 Students</b>				
<b>PBSA Bedspaces (at 1<sup>st</sup> April 2019)</b>	<b>5,850 Bedspaces</b>				

Source: University of Nottingham and Icen Analysis

- 2.44 Overall, with particular regard to planned student growth at the University of Nottingham given the influence of its location to Beeston, it does not appear that the recruitment ambitions of the Universities is likely to have a significant impact on the character or mix of housing in Broxtowe over the next five years when set against planned provision of purpose-built student accommodation in Nottingham and Broxtowe.
- 2.45 It is important to note however that the assessment of student growth is based on a short-term five year period, it is indicative and is subject to change. The Council should therefore continue to liaise with the Universities as appropriate to ensure that student growth does not outstrip the supply of purpose-built student accommodation moving forward, which could lead to greater pressure on the balance of existing communities.

#### **Summary: Student Housing Needs**

The NPPF is clear that the needs of students should be assessed and reflected in planning policies. Across the study area at the point of the 2011 Census, there were around 62,000 full time students aged 18 and over with around three quarters of these students living in Nottingham City.

The area has two higher education establishments which are relevant to this assessment including the University of Nottingham and Nottingham Trent University, as well as a number of further education colleges. As of 1st September 2017, the University of Nottingham had 33,100 full and part-time UG and PG students. Nottingham Trent University had an equivalent 30,890 students, which is the highest total number of students at the University in the last decade.

Both establishments experienced a fall in the number of full time students following the introduction of an increase in student fees by the Government in 2010/11; however, student numbers have increased again in recent years; with FTE student numbers at Nottingham Trent University now at their highest level over the last 10 years.

Across the study area, the profile of student accommodation varies markedly, which is likely to partly reflect the nature of students living in each of the authority areas. Our analysis shows that 31% of students aged 18 and over lived in an all student household in Broxtowe Borough; 44% in Nottingham City and 33% in Rushcliffe. It is notable that students residing in this form of student



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accommodation typically live in HMOs; and in some instances, the number of HMOs can become concentrated in particular areas.

In line with this, it is particularly notable that around 90% of students living in this type of accommodation in Broxtowe Borough were concentrated in the Beeston ward. The concentration of HMOs in this area is principally driven by strong influences of the University of Nottingham and Nottingham Trent University; and by the fact that this area is located at the western end of the University of Nottingham's Park Campus.

Our analysis shows that there are clusters of HMOs in certain areas of the Beeston Central ward including along Lower Road and Broadgate, which are all adjacent streets to University Boulevard and in close proximity to the University of Nottingham. There are also clusters in close proximity to Beeston Railway Station, with a number along Queens Road West (Beeston Central) and Lilac Grove (Beeston Rylands). It is also clear from our analysis that the number of new licensed HMOs has grown year-on-year since 2007 in the Beeston area to reach a total of 142 licensed HMOs at as 2019.

At a ward level, the evidence suggests that as a proportion of all households, the total number of licensed HMOs across the four Beeston wards where HMOs are concentrated Beeston Central, Beeston West, Beeston Rylands and Beeston North is relatively low. Taking the number of households in Beeston Central the ward with the most HMOs in Broxtowe at 2,180 at the point of the 2011 Census; we note that this would only represent 4.5% of all households.

Although the issue at a District of ward level is not particularly significant; as shown in Figure 3.5, there are notable clusters and concentrations forming on particular streets; principally on:

Lower Road, Beeston Central;

Broadgate, Beeston Central;

Salisbury Street, Beeston Central;

Queens Road, Beeston Central; and

Lilac Grove, Beeston Rylands.

In order to ensure that this area remains mixed but balanced; it is considered that there is sufficient evidence to justify the Council introducing an Article 4 Direction covering these streets. This would mean that planning permission will be required for a change of use from a C3 (dwelling house) to a Class C4 (small house in multiple occupation - HMO).

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However, it is recognised that by defining an Article 4 Direction too narrowly, there is a risk that student concentrations could simply spread to adjoining streets. The Council should take this into account in drawing the boundary to be covered by the Article 4 Direction within the Beeston area.

Looking at purpose-built student accommodation, the scale of development in Nottingham City has been significant. There is also a substantial level of pipeline supply. Coupled with a notable proportion of supply coming forward in Broxtowe, Icen consider that this has the potential to have a notable impact on the quantum and concentration of HMOs in and around the Beeston area; and help to ensure that Beeston retains a balanced and mixed community.

It is not considered that the indicative growth in full-time students requiring accommodation from the University of Nottingham and Nottingham Trent University is likely to have a significant impact on the character or mix of housing in Broxtowe over the next five years when set against planned provision of purpose built student accommodation in Nottingham and Broxtowe.

The Council should continue to liaise with the Universities as appropriate to ensure that student growth does not outstrip the supply of purpose built student accommodation moving forward, which could lead to greater pressure on the availability of family housing.