Compiled by the Planning Policy, Projects & Heritage Team
at Brighton & Hove City Council

Student Accommodation Study

November 2019

Contents

1. Executive Summary

1.1 The purpose of this report is to examine the balance between the supply of and demand for PBSA in the city over the City Plan period to 2030. It does this by examining:

- the number of students studying and requiring accommodation at both universities;
- the current and future supply of PBSA;
- the balance between the supply of and demand for PBSA from university students;
- the number of students requiring accommodating in non-student specific accommodation in the wider private housing sector, including students from educational institutions other than the two universities; and
- the potential effect on demand for wider private rented sector accommodation from the student population.

1.2 Estimates of combined full-time student numbers for the universities of Brighton and Sussex are set out in Table 1 below:

	2016/17	2017/18	2018/19	2019/20	*2029/30*
University of Brighton	13456	13986	14093	14225	*14225*
University of Sussex	15950	16663	17376	18000	*18000*
TOTAL	29406	30649	31469	32225	*32225*

Table 1: Student (full-time) population forecasts

1.3 It is assumed that 80% of full-time students require specific term-time accommodation, with the remaining 20% of full-time students, and all part-time students, making other arrangements. These include students living in their own home, or living with parents or other friends and family. Based on this assumption, the demand for accommodation from each institution is estimated to be as follows:

	2016/17	2017/18	2018/19	2019/20	*2029/30*
University of Brighton	10765	11189	11274	11380	*11380*
University of Sussex	12760	13330	13901	14400	*14400*
TOTAL	23525	24519	25175	25780	*25780*

Table 2: Student (full-time) population requiring accommodation forecasts

1.4 The supply of permitted PBSA is expected to be approximately 12,500 bed spaces in 2020, having doubled between 2015 and 2020. Further increases in supply to over 13,000 bedspaces are expected as the University of Sussex progresses the ‘West Slope’ development which has planning consent as part of the university masterplan and is expected to provide at least a further 1122 net bedspaces to be delivered post-2020[1].

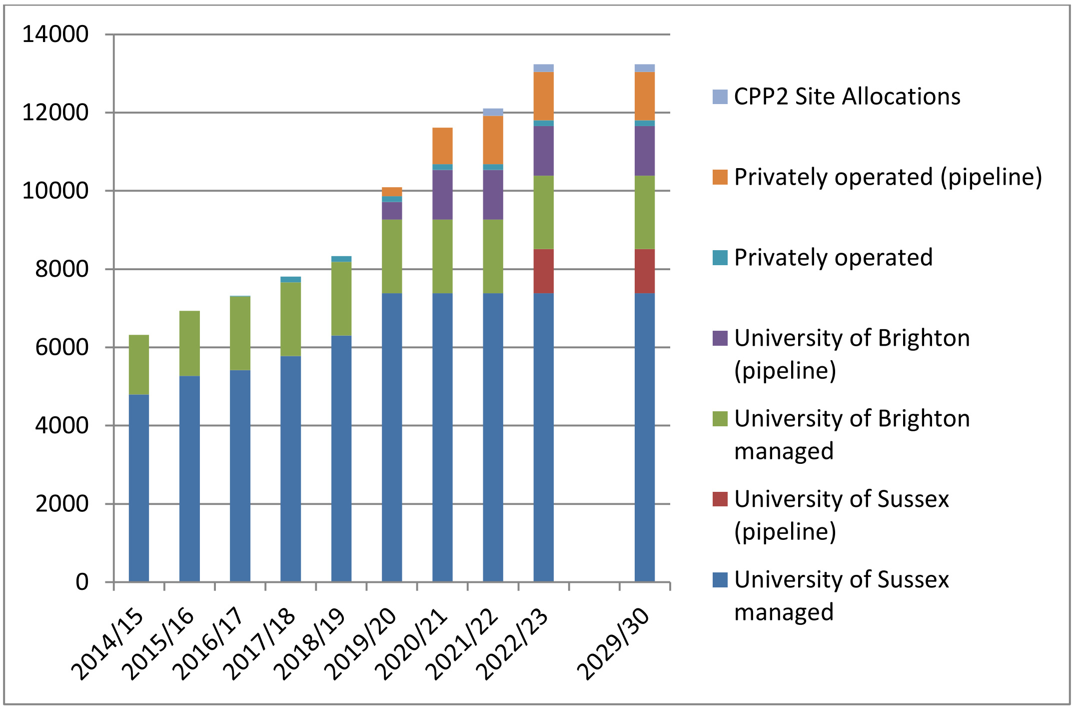


Figure 1: Total PBSA bedspaces 2015-2030

1.5 Figure 1 above illustrates the increasing supply of bedspaces in PBSA expected to be available to university students.

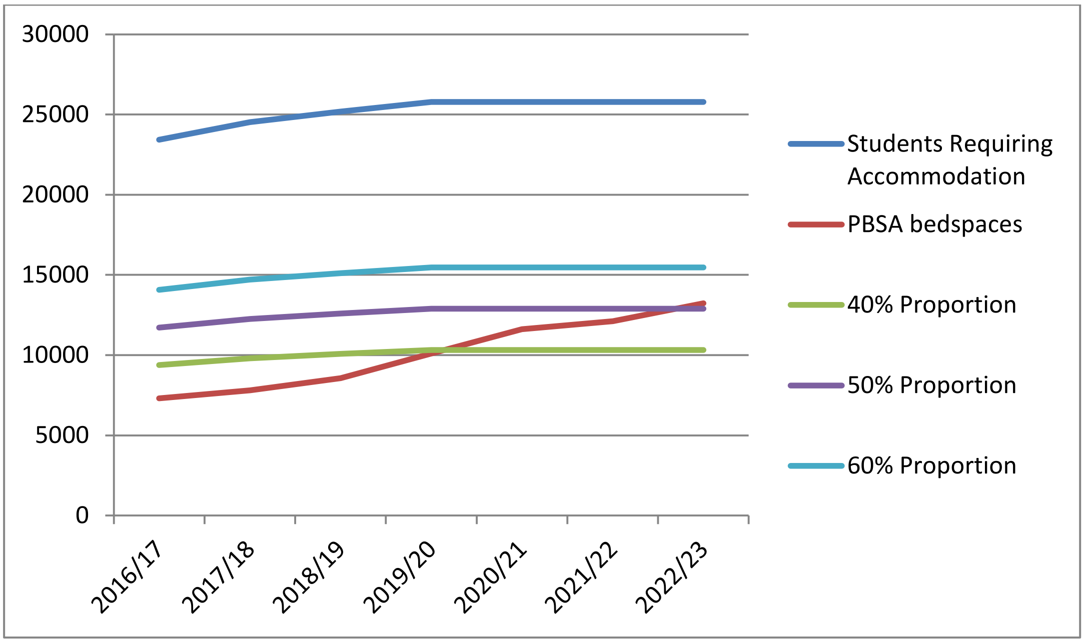


Figure 2: Overall PBSA supply and students requiring accommodation

[1] For the purposes of this analysis, delivery has been assumed to be in 2022.

1.6 The number of students requiring alternative accommodation in the private rented sector in these scenarios represents the gap between the red 'PBSA bedspaces' line and the blue 'Students requiring accommodation' line shown on Figure 2. It can be seen that the increases in PBSA provision that are expected will lead to a narrowing of the gap between these two lines and therefore a reduction in the number of students requiring alternative accommodation elsewhere in the private rented sector. This forecast reduction is illustrated in Figure 3 below.

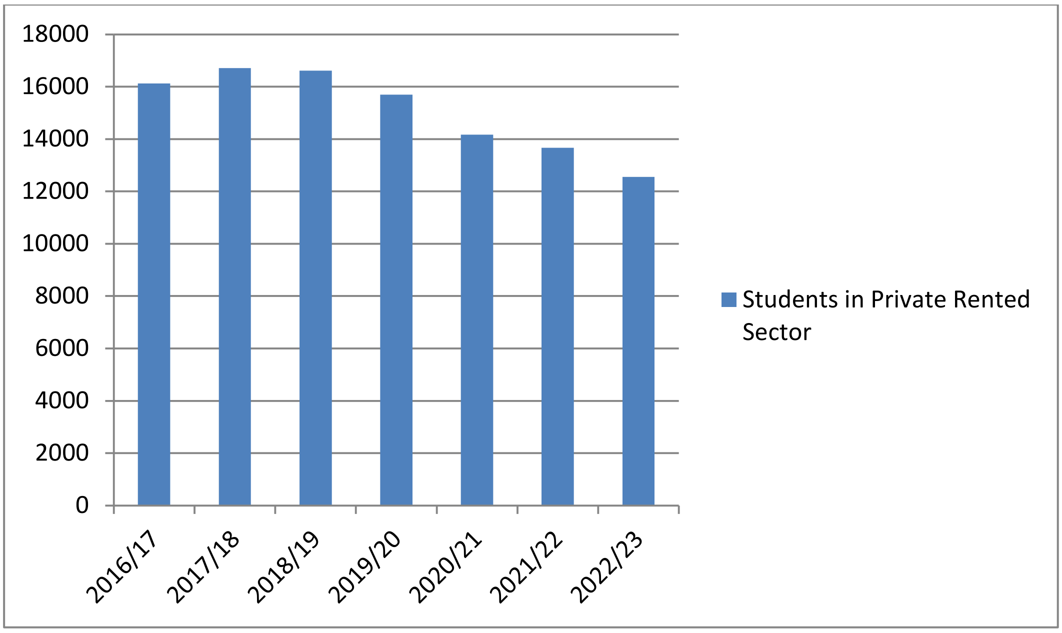


Figure 3: Number of Students Living in the Private Rented Sector by year

1.7 The number of university students in the private rented sector is expected to peak in 2017/18 and then fall, with significant year-on-year drops after 2018/19 as student numbers stabilise and a number of PBSA developments are delivered.

1.8 It is understood that this peak has resulted in an increased demand from the universities for head-leased properties in order to provide sufficient accommodation for their students.

1.9 Overall from 2016/17 to 2021/22 it is expected that the additional provision of PBSA could result in approximately 3,000 fewer university students residing in private rented accommodation.

1.10 The key conclusions set out in the report are as follows:

- The majority of the unmet demand for PBSA stems from University of Brighton students.
- The University of Sussex is planning to provide PBSA in excess of its own target set out in its latest masterplan.
- Current projections of supply and demand show that the proportion of university students requiring accommodation being housed in PBSA could rise from approximately 33% in 2016/17 to over 50% in 2022/23.

- The number of all-student households in the city rose annually from 2010/11 to 2017/18 before showing a slight decline in 2018/19
- Approximately 3,000 fewer university students could be housed in the private rented sector once all currently proposed PBSA developments are delivered in 2022/23.
- If recent observations of a greater proportion of students not requiring accommodation becomes a trend, then the reduction in the number of students residing in the private rented sector could be greater;
- It is likely that approximately 1,100 BIMM students are currently residing in the private rented sector.

2. Introduction and Context

2.1 Brighton & Hove's two universities and other educational establishments are major assets that are vital to the city's economy and make an important contribution to its economic and cultural life and its positive national and international reputation. The universities combined host approximately 30,000 full-time students at campuses within Brighton & Hove, with the British and Irish Modern Music Institute and a significant number of language schools further adding to the city's total student population.

2.2 There has been a significant increase in student numbers in the city over the past two decades, with the total number of all student households in the city, including those in Purpose Built Student Accommodation (PBSA), increasing by 27% from an estimated 6,617 to 8,400 between the 2010/11 and 2018/19 academic years.

2.3 Allocating sufficient sites for PBSA to meet the demand is challenging given broader housing needs in Brighton and Hove, and the need to protect employment land and the physical constraints of the city. The supply of PBSA has not matched the past expansion of the student population, particularly at the University of Brighton, and as a result the number of students requiring private rented accommodation in the city has increased significantly. The market has reacted to this demand through increases in the number of family homes converted to Houses in Multiple Occupation (HMOs) in the city. This has caused tensions in local communities over issues such as community cohesion and social relations, the balance and mix of local populations and housing, the sustainability of local communities and services, and the quality of the physical and urban environment[2].

2.4 Following the recommendations of the City Council's first Student Housing Strategy 2009- 2014, an 'Article 4 Direction' relating to HMOs came into force in April 2013 within five wards of Brighton and Hove[3]. Within these wards, the Article 4 Direction means that a planning application is required to change the use of a single dwelling house (defined as Use Class C3 in planning legislation) to a small HMO (C4 Use Class). The council now intends to implement a citywide extension of the Article 4 Direction, due to come into operation in summer 2020.

3. Purpose of this Report

3.1 The purpose of this report is to examine the balance between the supply of and demand for PBSA in the city over the City Plan period to 2030. It does this by examining:

- the number of students studying and requiring accommodation at both universities;

[2] Student Housing Strategy 2009-2014, Brighton & Hove City Council (2009)

[3] Hollingdean & Stanmer, Moulsecoomb and Bevendean, Queen's Part, St. Peters and North Laine and Hanover and Elm Grove.

- the current and future supply of PBSA;
- the balance between the supply of and demand for PBSA from university students;
- the number of students requiring accommodating in non-student specific accommodation in the wider private housing sector, including students from educational institutions other than the two universities; and
- the potential effect on demand for wider private rented sector accommodation from the student population.

3.2 It provides background evidence to support the emerging City Plan Part Two, the revised Student Housing Strategy and the determination of planning applications.

4. University Student Population Projections

4.1 The sections below set out forecasts for the expected number of full-time university students studying in Brighton & Hove over the City Plan period (i.e. to 2030).

4.2 Only full-time students are considered because in nearly all cases part-time students will be living in either their parental home or their own home and therefore do not create any demand for accommodation in excess of that provided for full-time students. Part-time students at the two universities are not included in any of the analysis of the current and future demand for PBSA in this report.

University of Sussex

4.3 The University of Sussex's full-time student population in 2017/18 was 16,890 students, all studying at its sole campus at Falmer[4]. The university's current masterplan published in 2013[5] set out a vision to 'expand to 18,000 students and beyond' by 2020. The University has since stated that it has no plans to further increase student numbers on the Falmer campus beyond the 18,000 target, with any further expansion to be achieved through other modes of delivery (e.g. distance learning) and potentially alternative locations outside of the city's administrative boundaries. As the university has not set out yearly estimates for student numbers the analysis has assumed a steady annual increase from 2017/18 to the targeted level of 18,000 students in 2019/20, as follows:

2016/17	2017/18	2018/19	2019/20
Actual figures		***Predicted***	
15,590	16,890	17,445	18,000

Table 3: Student (full-time) population forecasts University of Sussex (2016/17 to 2019/20)

University of Brighton

4.4 Recent updates of University of Brighton projections of student population forecasts between 2016/17 and 2019/20 reveal there is a small level of expected growth at their campuses in Brighton (see Table 4). All figures in this table are previous predictions provided by the university as there is no publically available data that disaggregates student numbers by campus.

Campus	2016/17	2017/18	2018/19	2019/20
Falmer	4499	4653	4676	4740
City	2250	2374	2379	2388
Moulsecoomb	6707	6959	7038	7097
Total	**13456**	**13986**	**14093**	**14225**

Table 4: Student (full-time) population forecasts University of Brighton (2016/17 to 2019/20)

[4] Higher Education Student Data www.hesa.ac.uk/

[5] Making the Future Strategy 2013-18, University of Sussex

Combined Student Numbers

4.5 Neither university has indicated there is any further planned expansion of on-campus student numbers after 2020. However, there are a number of factors which could affect the number of students studying in Brighton over the period to 2030. These include:

- the cost of university education – this may either increase or decrease over the period dependant on changes to accommodation and study costs. Changes in government policy at a national level could have a significant impact;
- impact of the United Kingdom's exit from the European Union on the UK's attractiveness and/or availability as an education destination for foreign based students;
- the introduction of two-year degree courses could reduce the length of time that students spend at university[6].

4.6 The impact of these factors is currently unknown. It is therefore anticipated that student numbers from 2020 to 2030 will remain broadly stable based on the information received from the universities. However, a 1% annual growth rate scenario has also been analysed as a sensitivity test (see Appendix 1).

4.7 Estimates of combined full-time student numbers are set out in Table 5 and illustrated in Figure 4 below:

	2016/17	**2017/18**	**2018/19**	**2019/20**	***2029/30***
University of Brighton	13456	13986	14093	14225	*14225*
University of Sussex	15950	16663	17376	18000	*18000*
TOTAL	29406	30649	31469	32225	*32225*

Table 5: Student (full-time) population forecasts

[6] www.gov.uk/government/news/two-year-university-courses-come-a-step-closer

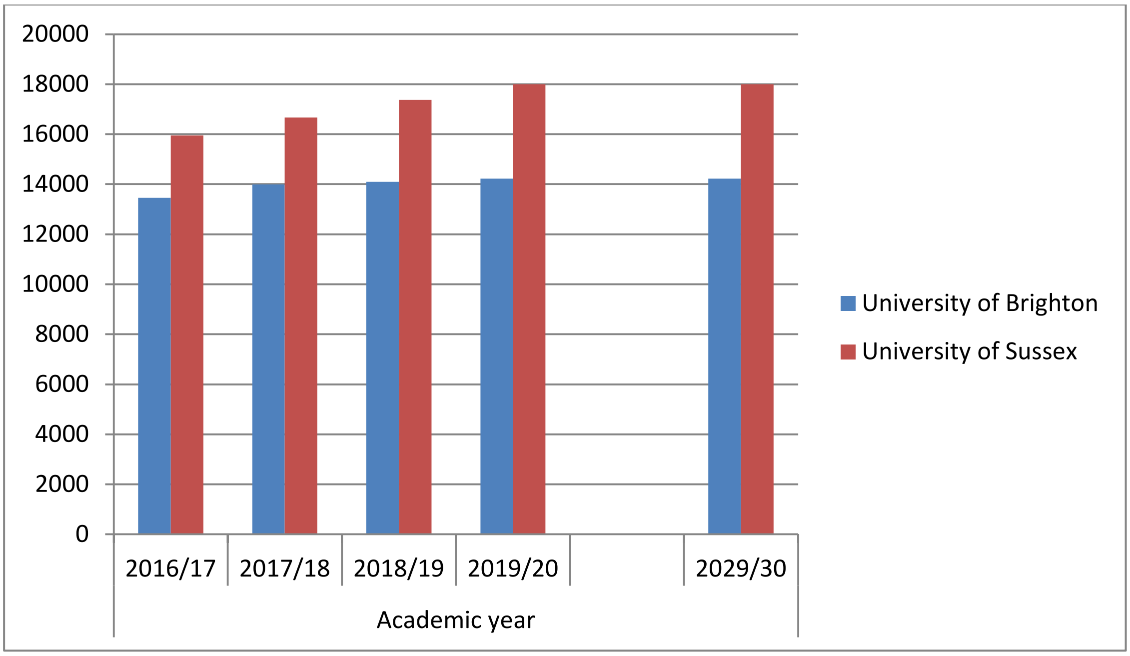


Figure 4: Total full-time student populations 2015-2030

4.8 Table 2 and Figure 1 show that the combined student population studying in the city at both universities between 2019/20-2029/30 is expected to be 32,225 full-time individuals[7].

4.9 It is assumed that 80% of full-time students require specific term-time accommodation, with the remaining 20% of full-time students, and all part-time students, making other arrangements. These include students living in their own home, or living with parents or other friends and family. Based on this assumption, the demand for accommodation from each institution is estimated to be as follows:

	2016/17	2017/18	2018/19	2019/20	*2029/30*
University of Brighton	10765	11189	11274	11380	*11380*
University of Sussex	12760	13330	13901	14400	*14400*
TOTAL	23525	24519	25175	25780	*25780*

Table 6: Student (full-time) population requiring accommodation forecasts

4.10 Table 6 shows that the demand for accommodation from university students is expected to peak at 25,780 individuals by 2019/20.

4.11 Recent anecdotal evidence has suggested that the proportion of students not requiring accommodation may be increasing with one university observing a figure nearer 30%. This may be due to higher economic constraints tied to tuition fees, student debt, and accommodation costs in the city. Should this trend continue then the number of individuals requiring accommodation may be less than the forecasts set out above. However there is insufficient evidence of this phenomenon to

[7] The total student population including part-time students is approximately 36,000.

establish a clear trend, and this analysis therefore retains the assumption that 80% of full-time students require specific term time accommodation. This will be monitored in future years.

Number of Student Only Households

4.12 Data held by the Council's Council Tax team can be used to track the number of student-only properties in the city. This is done through monitoring of the number of properties that benefit from a Council Tax exemption during each year by being solely occupied by students[8]. The data is further broken down into 'halls of residence' and 'student exemptions' (i.e. properties excluding halls of residence) to provide an indication of the number of properties in the private rented sector that are occupied by students. It should be noted that university head-leased properties are classified as 'halls of residence' as these are not currently available to rent by non-students, however they do represent a non-purpose built property that could be available for the general housing market in future and likely has been in the past.

	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
Excluding Halls of Residence	5766	6073	6162	6225	6240	6531	6797	7168	6990
Halls of Residence	851	1007	1052	1132	1252	1253	1286	1288	1410
All Properties	6617	7080	7214	7357	7492	7784	8083	8456	8400

Figure 7: Number of Student Only Households

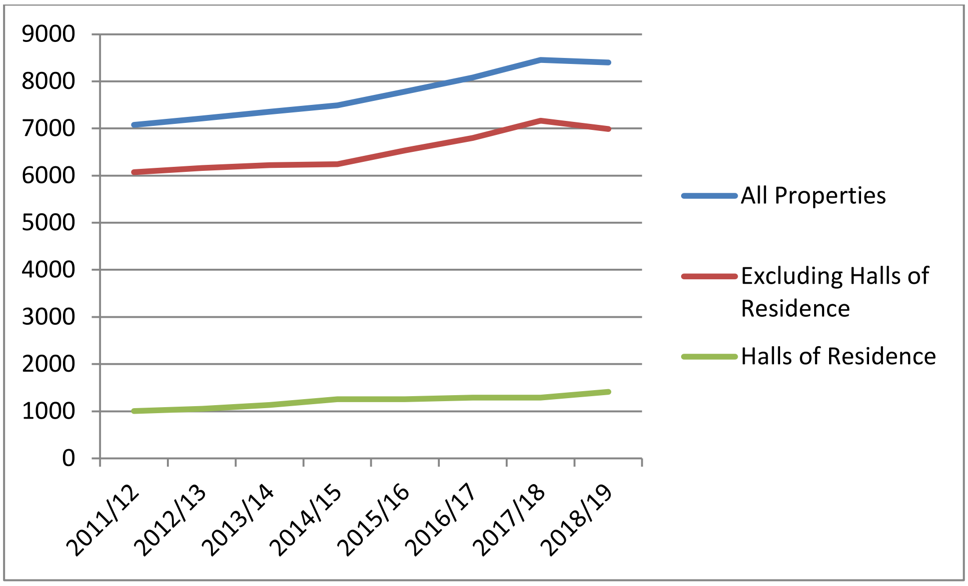


Figure 5: Number of Student Only Households

4.13 It can be seen that the number of student only households has significantly increased in recent years, with a much greater proportion of the increase being properties in the general housing stock that are not classified as halls of residence. A

[8] Properties included are those where a Class M (Halls of Residence) or Class N (Full-time Student) exemption existed at some point between the first and last days of the respective financial year.

slight decrease has been observed in most recent monitoring year, however it remains to be seen if this is an anomaly or the beginning of a new trend. Short term factors such as the uncertainty surrounding the Brexit process may have had an effect, for example through a possible reduction in the number of foreign students choosing to study in the United Kingdom. The situation will be monitored in future years.

4.14 A further breakdown of the properties by Council Tax banding provides an indication of the types of properties that are occupied by students (see Appendix 3 for detailed information). It is notable that a significant proportion are in the lower Bands A and B (27% and 23% respectively in 2017/18, and broadly similar in other years), and are considered to be more likely to be flats rather than houses. This is because Council Tax bandings are based on property values, with flats being more likely to be valued lower and consequently in a lower band. This is notable as it indicates that a significant proportion of the student population is likely to be living in accommodation other than HMOs[9].

4.15 Figure 6 below illustrates the breakdown of properties by band during 2017/18.

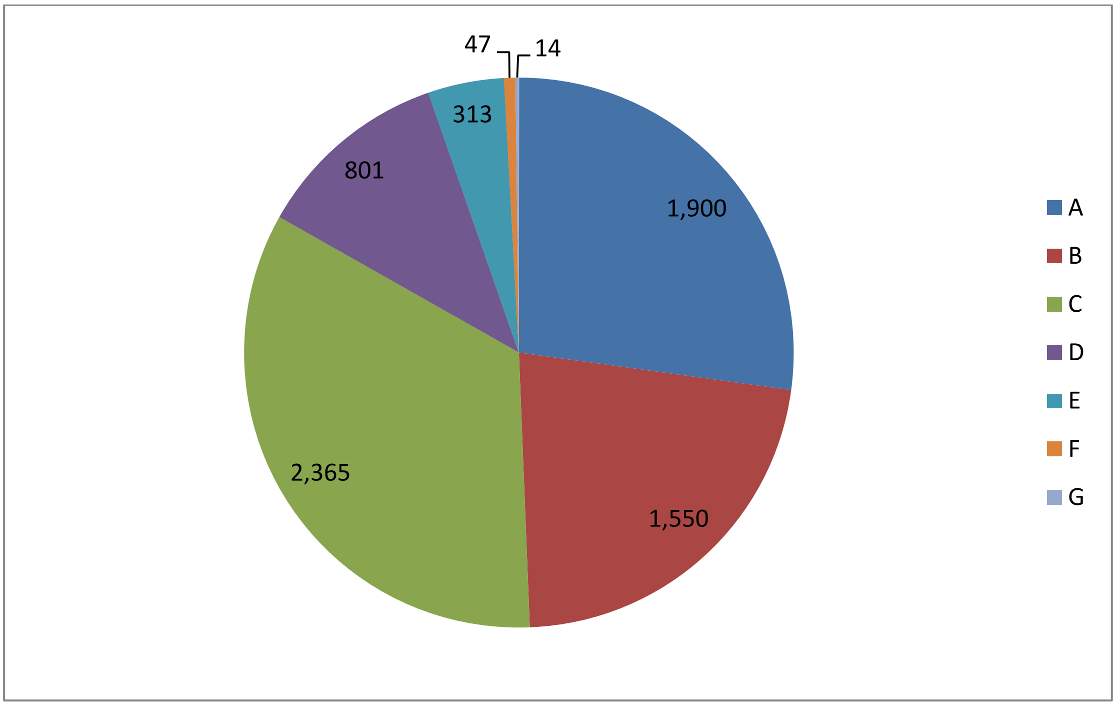


Figure 6: Number of Student Exemption Properties by Council Tax Band (2018/19)

[9] Some larger flats may also be considered HMOs if three or more unrelated individuals are residing together.

5. Supply of PBSA Bedspaces

5.1 The current and anticipated future supply of PBSA bedspaces available to university students has been derived from the following sources:

University Managed Accommodation

5.2 University managed accommodation includes some off-campus private developments where these are directly tied to the relevant institution[10].

5.3 The University of Brighton's current Accommodation Strategy has been used to establish the supply of PBSA that is managed by that university, with the relevant information reproduced in Table 8 below.

Location	2014/15	2015/16	2016/17	2017/18
City Campus	298	298	748	748
Moulsecoomb Campus	163	163	163	979
Falmer Campus	1,058	1,205	1,405	1,405
Total provision Brighton and Hove	**1,519**	**1,666**	**2,330**	**3,146**

Table 8: University of Brighton managed PBSA bedspaces

5.4 Dialogue with the University of Sussex has indicated their total bedspace provision to be as follows:

Year	Bedspaces	Excluding head-leased
2014/15	4800	unknown
2015/16	5270	unknown
2016/17	5420	unknown
2017/18	6078	5778
2018/19	6606	6306
2019/20	7687	7387

Table 9: University of Sussex managed PBSA bedspaces

5.5 The 'West Slope' development at the University of Sussex campus has planning permission for an additional 1122 bedspaces and will be developed post-2020, however no firm timescale has yet been set. It has been included in the analysis as a 'pipeline development'[11] with delivery in 2022/23.

5.6 The figures in table 5 include 300 bedspaces in university head-leased properties. As these are considered to more akin to HMOs and also remove

[10] For example the former Co-op building, London Road is included in the University of Sussex figures.

[11] Pipeline developments are those which have gained planning permission but have not yet been completed

residential properties from the general housing stock as they are not purpose-built for students, these bedspaces have been excluded from the further analysis that follows. Before 2016/17 it is unknown what proportion of the bedspaces are from head-leased properties so the figures have been unaltered. This does not affect the current and future supply/demand analysis.

Private PBSA Developments

5.7 A number of privately developed and operated PBSA developments have been permitted in Brighton & Hove in recent years. These developments are not directly linked to a particular educational establishment and can attract students from a number of sources, although legal agreements attached to planning permissions normally restrict those sources to existing educational establishments in Brighton & Hove.

5.8 Those currently operating appear to only offer tenancies of a full academic year, so it is considered highly likely that the occupants are university students, rather than language students whose courses are normally shorter and therefore require accommodation for a shorter period. Where developments are known to be solely occupied by non-university students, these have been excluded from this analysis[12].

5.9 Those currently operating provide a relatively small number of bedspaces, however the level of supply from this source is expected to increase sharply from the 2019/20 academic year as larger permitted developments currently under construction are delivered and occupied.

5.10 The location of the private developments is set out in Table 10 below, together with the number of bedspaces provided[13]. The estimated date for completion has been informed by on-site progress and in some cases dialogue with developers.

[12] For example, the development at 27-33 Ditchling Road, Brighton.
[13] Information correct at August 2019.

Year of Delivery	Completed Developments/ bedspaces	Pipeline development (predicted) /bedspaces
2017/18	Stone Street (14)	
2018/19	106 Lewes Road (44) 112-113 Lewes Road (39) 119 Lewes Road (51)	
2019/20		Willow Surgery site, Bevendean (19) 54 Hollingdean Road (205)
2020/21		Preston Barracks (522) Pelham Terrace (189);
2021/22		118-132 London Road (232) Park Wall Farm Cottages (71)

Table 10: Delivery of Private PBSA Developments

Draft City Plan Part Two Allocations

5.11 Two PBSA site allocations are proposed in Policy H3 of the draft City Plan Part 2. These are:

- Lewes Road Bus Garage – 250 bedspaces
- 118-132 London Road – 232 bedspaces
- Hollingdean Road – 40 bedspaces

5.12 The site at 118-32 London received planning permission for 232 bedspaces in March 2019. The bedspace figures for remaining sites have been included in the analysis however it should be noted that they are indicative and the delivery of these sites is not certain at this stage. Consultation on the draft CPP2 took place from July – September 2018.

5.13 Additionally, the 'Falmer Released Land' site is identified in City Plan Part One Policy DA3 (Lewes Road Development Area) as being suitable for development of a range of uses, including PBSA. However there is considered to be greater uncertainty over the availability of this site for PBSA due to the range of uses that are supported by the policy, and no allowance has been made in the analysis for any potential contribution to supply that it could make.

Windfall Developments

5.14 There may also be additional windfall developments that come forward on unallocated sites during the plan period. No allowance has been made for this in the analysis due to the greater uncertainty.

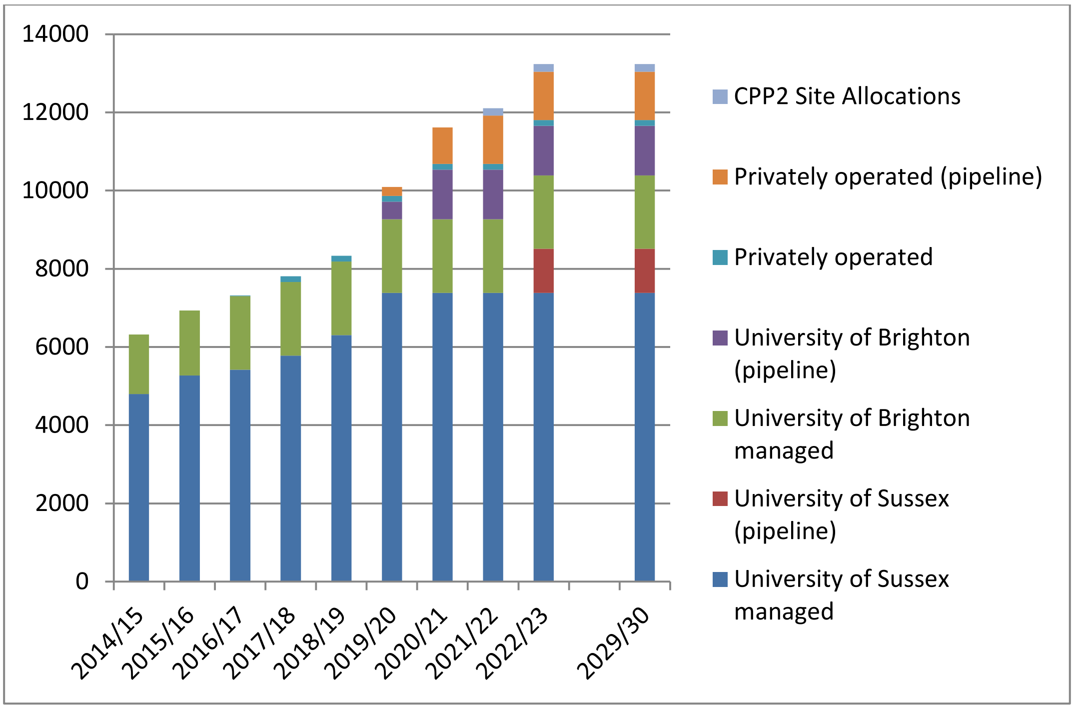


Figure 7: Total PBSA bedspaces 2015-2030

5.15 Figure 7 above illustrates the increasing supply of bedspaces in PBSA expected to be available to university students.

5.16 The supply of permitted PBSA is expected to be approximately 12,500 bed spaces in 2020, having doubled between 2015 and 2020. Further increases in supply to over 13,000 bedspaces are expected as the University of Sussex progresses the 'West Slope' development which has planning consent as part of the university masterplan and is expected to provide at least a further 1122 net bedspaces to be delivered post-2020[14].

[14] For the purposes of this analysis, delivery has been assumed to be in 2022.

6. The Balance between PBSA and Private Rented Housing

6.1 In common with other university cities, it is not expected that all students requiring accommodation would seek to reside in PBSA, or that sufficient PBSA could be developed in the city to meet the full predicted demand for accommodation. It is therefore expected that there will remain a significant cohort of students residing in the private rented sector, with the majority of these likely to be in HMOs. Nationally, there is considerable debate about what percentage of students can most effectively reside in PBSA, and how this may be influenced by year of study and mode of study.

6.2 With this in mind, the following basic model is useful for a hypothetical university with 10,000 students requiring dedicated term-time student accommodation. If all incoming undergraduates resided in PBSA (3,000 students), and 20% of second and third year students resided in PBSA (1,200 students) that would mean 47% of the undergraduate student population would reside in PBSA, with 53% of undergraduate students residing in the private rented sector (4,800 students). If 80% (800) of the total postgraduate student population resided in PBSA, which would give rise to 50% of the total student population residing in PBSA and private rented housing. In total, this would equate with 5,000 students in private rented housing in this hypothetical scenario.

University X with 10,000 students requiring dedicated term-time accommodation.

- 9,000 undergraduate and 1,000 postgraduate students

- Equal numbers of undergraduate student population by year of study
- 100% first year = 3,000 students
- 20% second year = 600 students
- 20% third / fourth year = 600 students
- Total = 4,200 students / 9,000 students = 47%

- 1,000 postgraduates students – 80% demand PBSA

- Total student population = 50% in PBSA and 50% in private rented housing.

6.3 In the following section the balance between the supply of PBSA and students requiring accommodation at each university is explored and compared to three scenarios of proportions of students residing in PBSA (40%, 50% and 60% of students requiring accommodation residing in PBSA).

6.4 It should be noted that the first part of this analysis is separated by university and therefore only considers PBSA developments that are operated by, or directly tied to, the university. The contribution that privately operated PBSA developments could make towards meeting the demand is considered later as incorporating these into the analysis for both universities individually would lead to double counting of these bedspaces.

6.5 The values in Figures 3, 4 and 5 for 2022/23 would remain constant in subsequent years given the assumption that no further PBSA would be developed and that student numbers would remain stable.

University of Sussex

6.6 The University of Sussex's masterplan sets out an intention to "increase the accommodation available to provide housing for 40% of our students"[15]. This '40%' relates to the entirety of the student cohort, rather than a percentage of those requiring accommodation. Taken as a proportion of the 80% of students considered to require accommodation, it represents 50% - in line with the hypothetical scenario set out above.

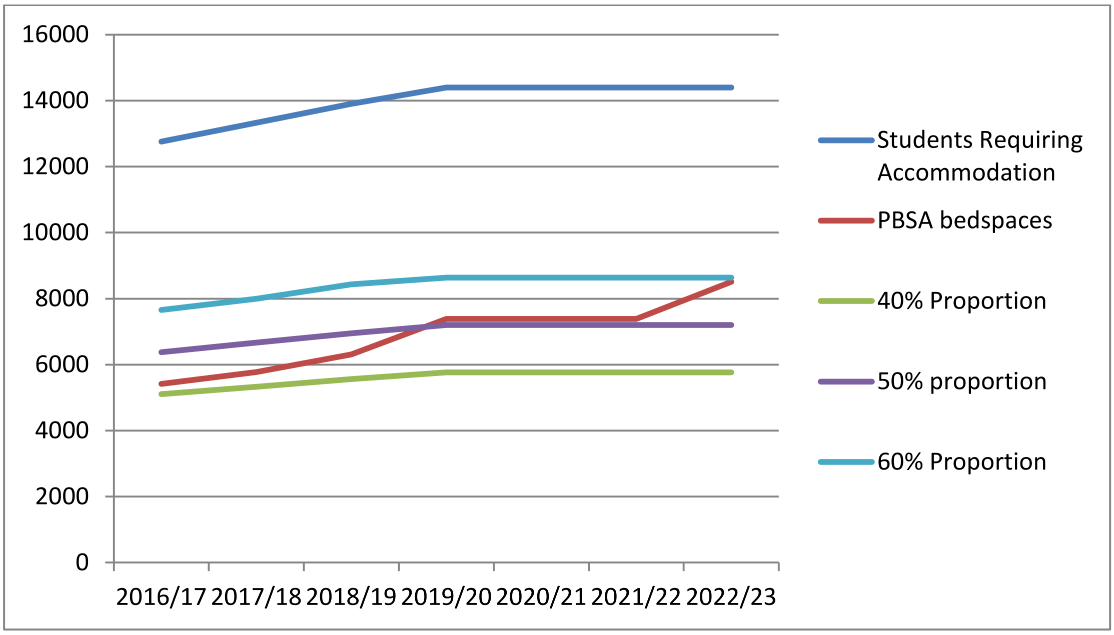


Figure 8: PBSA supply and students requiring accommodation at University of Sussex

6.7 Figure 8 above shows that the proportion of students requiring accommodation that the University of Sussex is able to accommodate in its own PBSA developments is expected to steadily rise from under 50% in 2016/17 to approximately 60% once the West Slope development is delivered in the 2020s, significantly above the target set out in the university's masterplan. The graph indicates the pipeline supply from West Slope being delivered in 2022/23 however it should be noted that this is likely to be delivered in phases over a number of years.

University of Brighton

[15] New Strategic Plan, University of Sussex (2013)

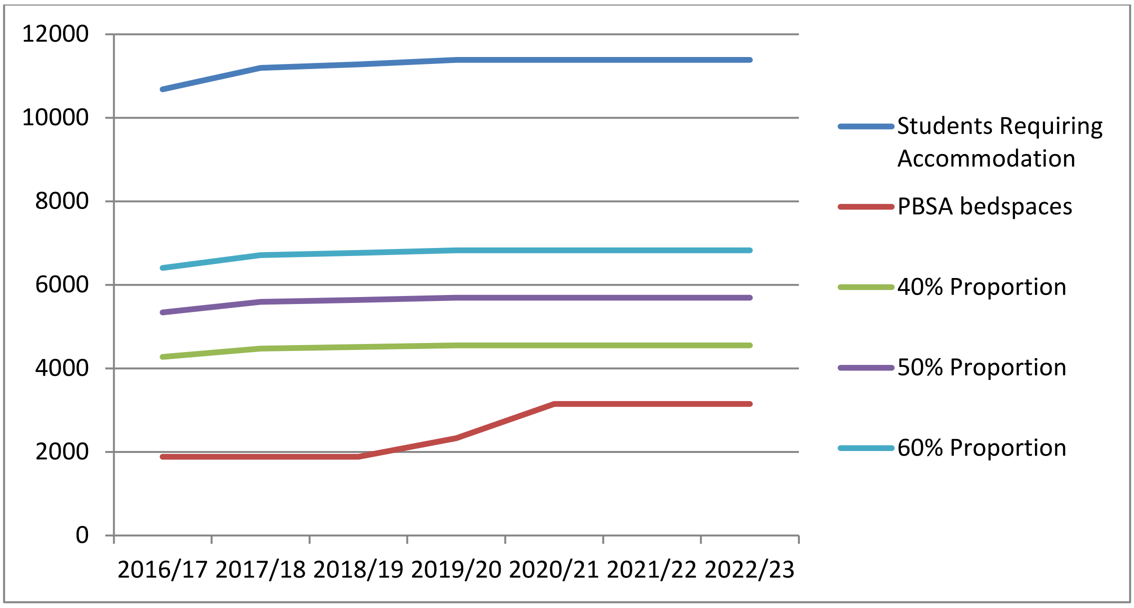


Figure 9: PBSA supply and students requiring accommodation at University of Brighton

6.8 By contrast, Figure 9 indicates that the proportion of students that the University of Brighton is able to accommodate is considerably less despite forthcoming increases in PBSA provision as the Circus Street and Preston Barracks developments are completed for the 2019/20 and 2020/21 academic years respectively.

Overall Situation

6.9 To get an overall view of the balance between supply and demand for the city as a whole Figure 7 below combines the values used for the universities in Figures 5 and 6 above, and also takes into account privately operated PBSA developments which are available to university students in order to establish the overall level of provision in the city.

6.10 By 2022, using the estimates for overall PBSA capacity set out in Figure 2, it is estimated that proportion of university students requiring accommodation being housed in PBSA could rise from approximately 33% to over 50%.

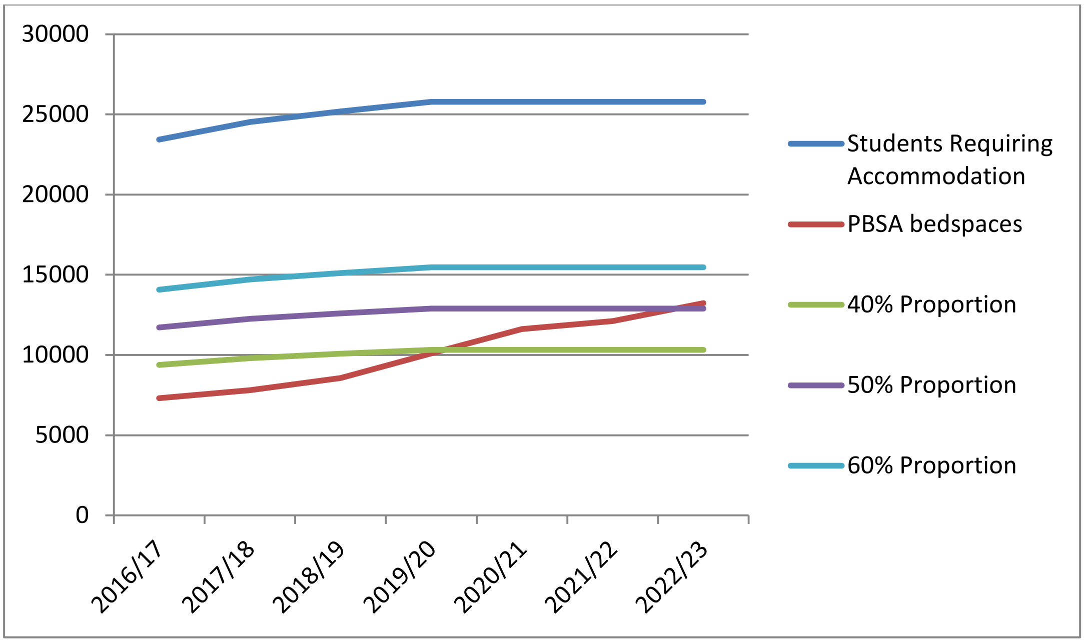


Figure 10: Overall PBSA supply and students requiring accommodation

7. Effect on Demand for Private Rented Sector Accommodation

7.1 The number of students requiring alternative accommodation in the private rented sector in these scenarios represents the gap between the red 'PBSA bedspaces' line and the blue 'Students requiring accommodation' line shown on Figure 10. It can be seen that the increases in PBSA provision that are expected will lead to a narrowing of the gap between these two lines and therefore a reduction in the number of students requiring alternative accommodation elsewhere in the private rented sector. This forecast reduction is illustrated in Figure 11 below.

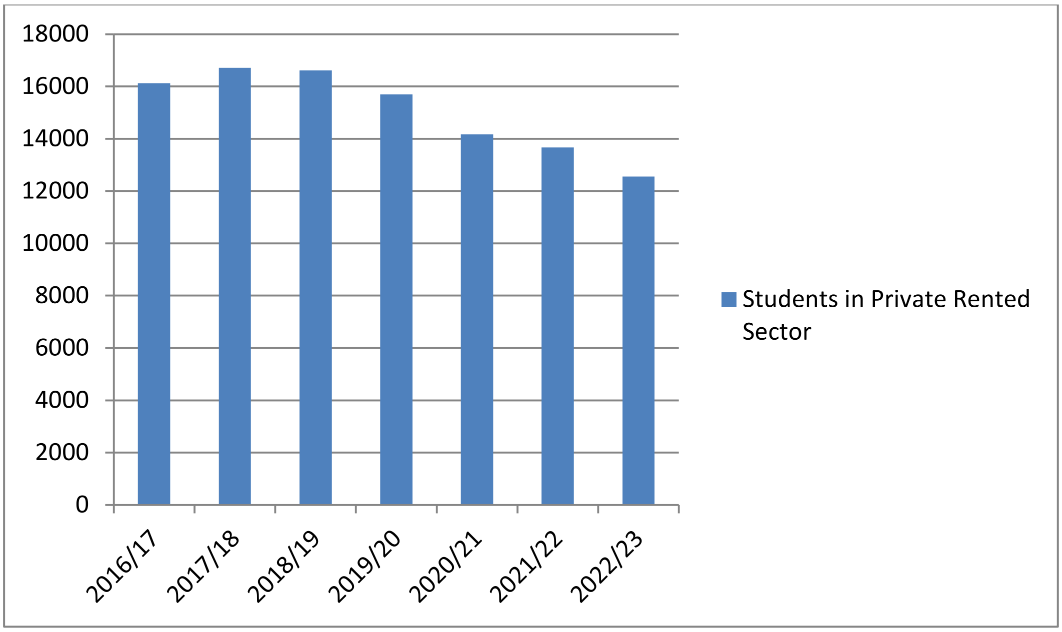


Figure 11: Number of Students Living in the Private Rented Sector by year

7.2 The number of university students in the private rented sector is expected to peak in 2017/18 and then fall, with significant year-on-year drops after 2018/19 as student numbers stabilise and a number of PBSA developments are delivered.

7.3 It is understood that this peak has resulted in an increased demand from the universities for head-leased properties in order to provide sufficient accommodation for their students.

7.4 Overall from 2016/17 to 2021/22 it is expected that the additional provision of PBSA could result in approximately 3,000 fewer university students residing in private rented accommodation.

7.5 It should be noted that some students may live outside of the city's administrative boundary, so whilst the overall number of students in the private rented sector may decrease, not all of the decrease may occur within Brighton & Hove. However, it is considered likely that the majority of any easing of demand in this sector would be felt within the city. It is hoped that this expected decrease will translate into the freeing up of residential units for use in the wider general housing sector.

7.6 The type of properties that could be vacated is likely to depend on the nature of the PBSA that is developed. For example, more expensive high-end studio developments are likely to be more attractive to students who currently live in comparably expensive one-bedroom flats rather than HMOs. As it is a strategic priority for the Council to aim to reduce the number of HMOs due to significant areas of the city experience high concentrations, Policy DM8 in the draft City Plan Part Two (CPP2) which relates to PBSA includes a criterion to ensure that PBSA developments provide predominantly cluster units rather than more expensive self-contained studio units. Cluster flats are less expensive and therefore likely to be more attractive to students who would otherwise choose to live in HMOs.

7.7 If recent observations of a greater proportion of students not requiring accommodation becomes a trend (see paragraph 3.11) above, then the number of students requiring accommodation will decrease with consequent potential for a greater number of properties in the general housing sector to be vacated by students.

8. Language and Music Schools

Language Schools

8.1 As well as the two universities, it is important to note that the city also hosts a number of language and music schools, whose students also have accommodation requirements.

8.2 A total of 49 language schools were identified as operating in Brighton and Hove in 2016. Follow-up research during 2017 with language schools, language students, and host families has identified that the vast majority of language school students within Brighton and Hove reside with host families. Students are often accommodated in what would be empty bedrooms, thus providing a more efficient use of housing stock in the city. Some language schools steer students into small scale dedicated accommodation that they own and/or manage in the city. It is likely that very few language school students find their own accommodation in HMOs within the city.

8.3 An examination of language school websites in 2019 (see Appendix 2) supports the findings of this earlier research, as the vast majority clearly promote host family accommodation as the primary accommodation option available. A number also arrange accommodation in the University of Brighton's Phoenix Halls development during the university summer vacation, and the Britannia Study Hotel is also used by students of a number of institutions. This facility is operated as a hotel, and is available to book on popular hotel websites, but is clearly targeted towards the language student market. Some language schools provide details of letting agents and websites to enable students to secure their own accommodation in the private rented sector.

8.4 Kings College operates its own PBSA development attached to its campus on Ditchling Road, Brighton, and has indicated that it has a need for additional PBSA bedspaces to support planned growth. It is interested in a nominations agreement for approximately 100 bedspaces with the developer of the proposed PBSA development at 118-132 London Road in order to fulfil extra demand for PBSA resulting from expansion. This process would not lead to any private rented sector accommodation being freed up as it is to support an increase in student numbers rather than the transfer of an existing cohort of students from one type of accommodation to another.

8.5 It is possible that some language school students may make independent arrangements to reside in privately operated PBSA developments, however none of these developments have been identified as offering short-term tenancies that would be suitable for language school students who are likely to be studying on courses shorter in length than a traditional academic year.

Music School

8.6 The British and Irish Modern Music Institute (BIMM) has approximately 1,600 students in the city, with an additional 90 (due to increase to 190) at the Brighton Institute for Contemporary Theatre Training (BRICTT) which has been incorporated into the college's structures. There is no expected increase within the music school itself. BIMM operates no halls of residence, and produces an accommodation guide for students which sets out the various options available to its students, such as house-shares (i.e. HMOs) and host-families[16]. The college does not hold a quantitative breakdown of student accommodation preferences, however it has indicated that it is likely that the majority of its students over the age of 18 live in independent private rented sector accommodation such as HMOs. Students under 18 predominantly live at home with a number residing with host families. The college's accommodation advisor is not aware of any students residing in privately operated PBSA due to the higher costs involved with this type of accommodation.

8.7 The college has indicated that approximately 200 of its students are under 18, which leaves approximately 1,400 over 18. If it is assumed that, similarly to the universities, 80% of students require dedicated term-time accommodation, this represents an additional group of around 1,100 students that require specific accommodation in addition to those studying at the two universities.

8.8 It should be noted that the margin of error of the information with regard to the music school students is considered to be greater and further research would need to be carried out to establish a more accurate picture of its students' accommodation requirements.

9. Key Conclusions

9.1 This report sets out data and analysis relating to the future balance between supply and demand for PBSA in Brighton & Hove over the period to 2030 and the consequent effect on demand for private rented sector accommodation from students.

9.2 The key conclusions are as follows:

- The majority of the unmet demand for PBSA stems from University of Brighton students.
- The University of Sussex is planning to provide PBSA in excess of its own target set out in its latest masterplan.
- Current projections of supply and demand show that the proportion of university students requiring accommodation being housed in PBSA could rise from approximately 33% in 2016/17 to over 50% in 2022/23.

[16] www.bimm.co.uk/wp-content/uploads/2017/10/1301BP-bimm-brighton-accommodation-guide-2018-19-web-original.pdf

- The number of all-student households in the city rose annually from 2010/11 to 2017/18 before showing a slight decline in 2018/19
- Approximately 3,000 fewer university students could be housed in the private rented sector once all currently proposed PBSA developments are delivered in 2022/23.
- If recent observations of a greater proportion of students not requiring accommodation becomes a trend, then the reduction in the number of students residing in the private rented sector could be greater;
- It is likely that approximately 1,100 BIMM students are currently residing in the private rented sector.

Appendices

Appendix 1: 1% Growth Rate 2020-2030 Sensitivity Test

A1 This section sets out how the projections would differ if student numbers at both universities grew at a rate of 1% per annum during the period 2020 – 2030 instead of stabilising at 2020 levels. It should be noted that neither university anticipates this growth to occur.

A2 With 1% annual growth in the student population at both universities between 2020-2030, the total full-time student populations at the University of Brighton and University of Sussex would increase by a further 1,191 and 1,466 students respectively during the ten year period to 2030.

A3 Figures A1 and A2 illustrate the impact of this assumption on the balance between students requiring accommodation at each university and the amount of PBSA provided by the respective university.

Figure A1: PBSA supply and students requiring accommodation at University of Sussex

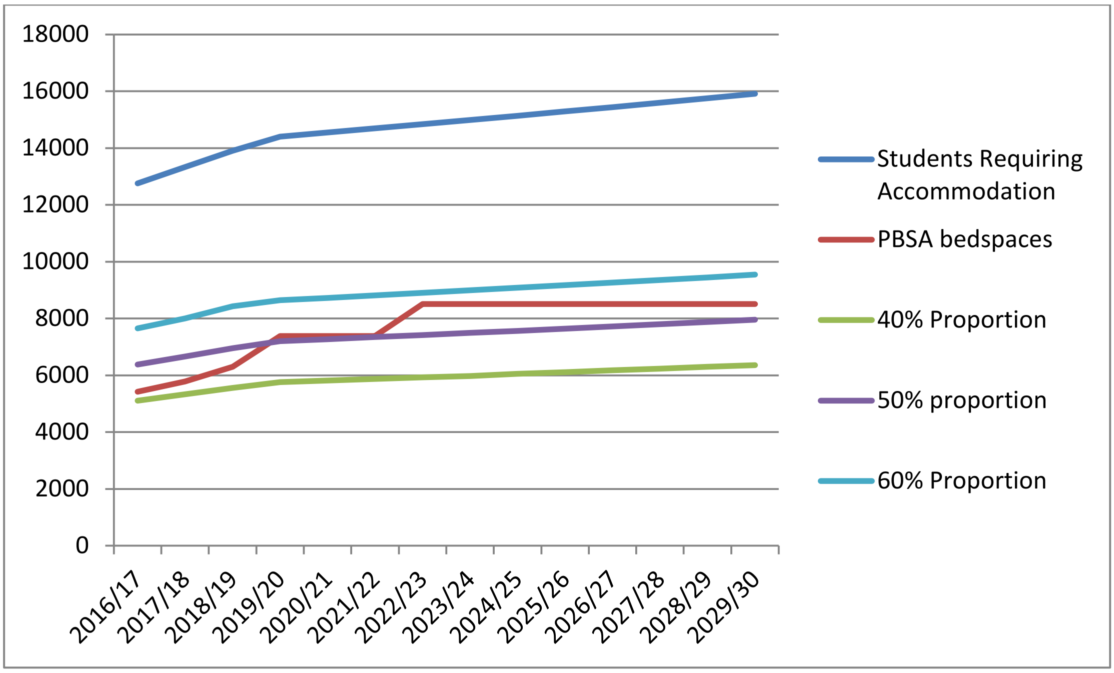
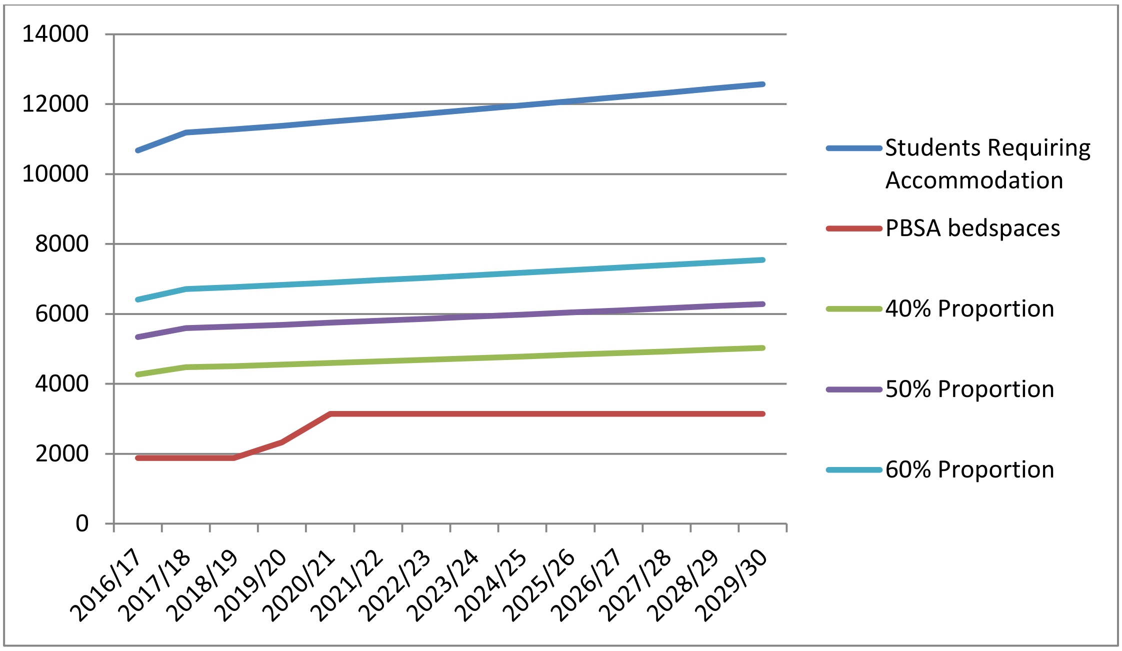
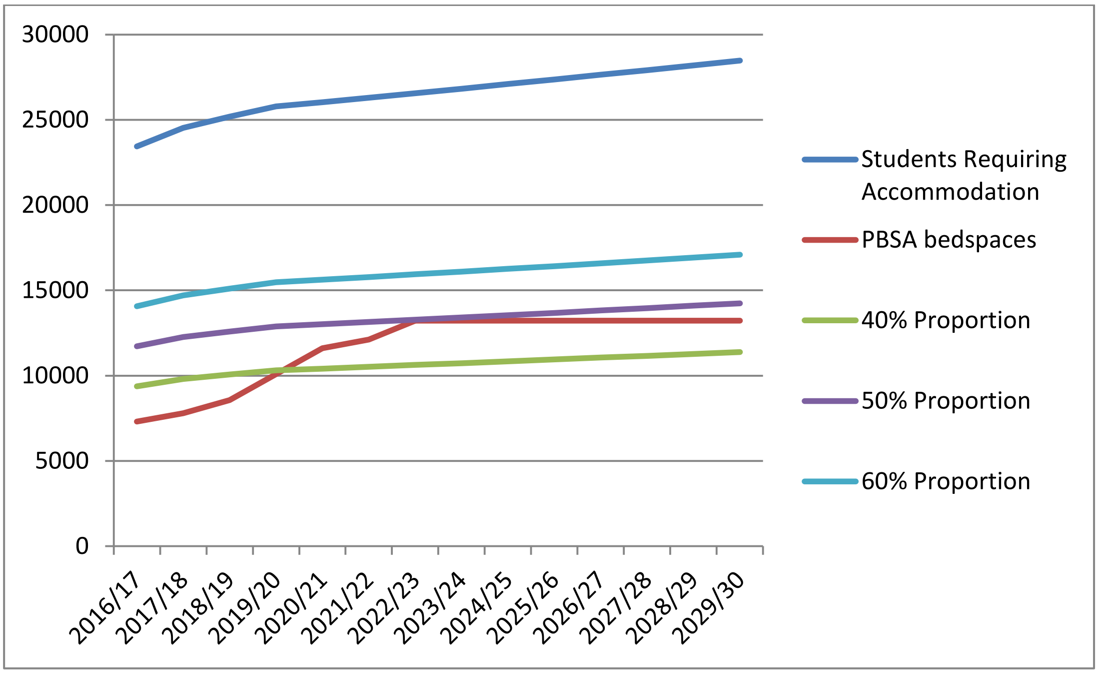


Figure A2: PBSA supply and students requiring accommodation at University of Brighton



A3 It can be seen that the University of Sussex would still be able to accommodate over 50% of students requiring accommodation in its own PBSA despite the increasing student numbers.

A4 The overall situation taking into account additional PBSA supply provided by privately operated developments is shown in Figure A3 below. This shows that the proportion of students requiring accommodation that can be accommodated in PBSA rises from approximately 31% in 2016/17 to 50% in 2021/22 as the supply of PBSA increases, but then gradually declines to approximately 46% by 2029/30 due to the continuing increase in demand caused by increasing student numbers.



A5 The impact of this on the number of students residing in the private rented sector is shown in Figure A3 below. The decline over the period to 2020 reflects that shown in Figure 6 above due to the significant amount of PBSA delivered in this period, however as students numbers continue to rise after this point the trend reverses and the numbers steadily increase as the analysis assumes no further PBSA is delivered after 2021/22. Despite this, the forecasts show that would still be 1476 fewer students in the private rented sector in 2029/30 than in the peak year of 2017/18.

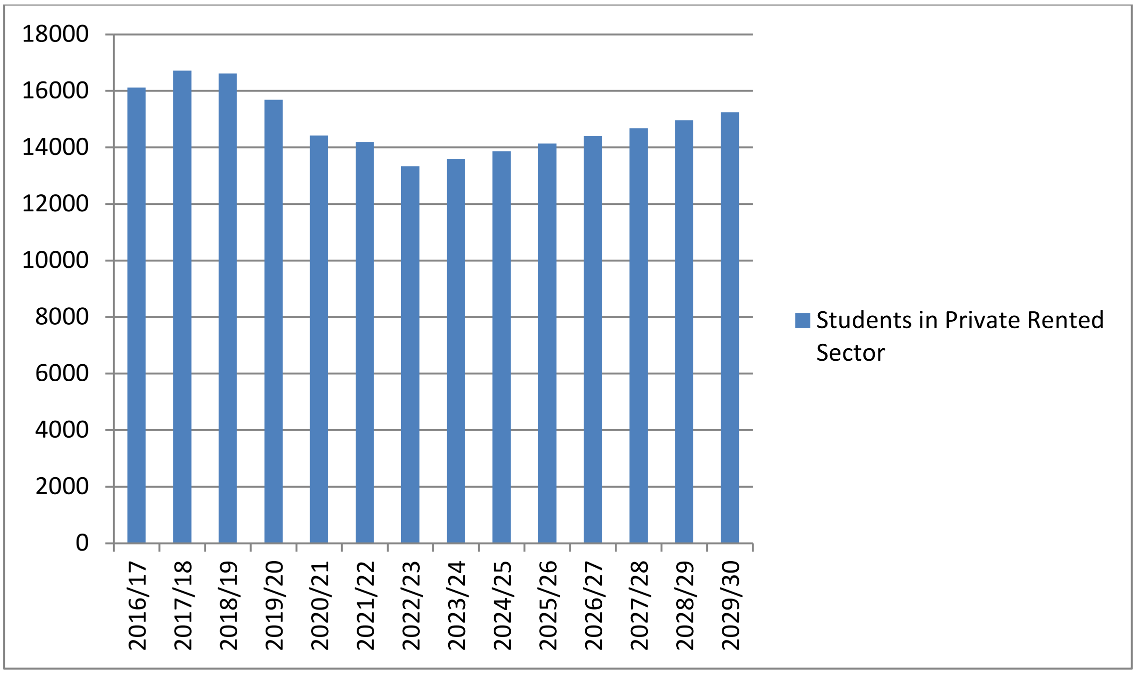


Figure A3 – Estimated Students in Private Rented Sector

Appendix 2 – Accommodation Arrangements for Language Schools in Brighton & Hove

Institution	Accommodation Arrangements
English Language Centre, Hove	Homestay, Britannia Study Hotel (134 bedrooms), one student house
ISE	Homestay, links to flat rental websites for longer stay students
Interactive English School	Homestay recommended. Links to gumtree etc
Oxford International	Homestay, Phoenix (summer only), Britannia study Hotel
British Study Centres	Homestay
Language Studies International	Homestay, Mountford House
Castle School of English	Homestay
Stafford House	Homestay, Vallance Gardens student houses, Phoenix, Britannia

Institution	Accommodation Arrangements
Sprachcaffe	Apartments, homestay, Club residence, Summer campus residence
Regent Brighton	Homestay, hotels
EC Brighton	Homestay, Britannia Study Hotel, 42 Marine Parade, 25 Portland Place
BISS	Homestay
St. Giles	Homestay, Court Craven guest house, George Street Residences (30 student rooms)
English First	Homestay, International House (unknown bedrooms), Lewes Court (University of Sussex - Summer only)

Appendix 3 – Number of Student-only Properties by Council Tax Band, 2010/11 – 2018/19 (excluding Halls of Residence and university head-leased properties)

Student Properties (Halls of Residence Excluded)

2010/11 Student Properties

Year	Band	PropCount
2010-2011	A	1,570
2010-2011	B	1,314
2010-2011	C	2,005
2010-2011	D	638
2010-2011	E	189
2010-2011	F	36
2010-2011	G	14
2010-2011	H	0
	TOTAL	5,766

2011/12 Student Properties

Year	Band	PropCount
2011-2012	A	1,670
2011-2012	B	1,342
2011-2012	C	2,127
2011-2012	D	666
2011-2012	E	217
2011-2012	F	40
2011-2012	G	11
2011-2012	H	0
	TOTAL	6,073

2012/13 Student Properties

Year	Band	PropCount
2012-2013	A	1,664
2012-2013	B	1,348
2012-2013	C	2,197
2012-2013	D	679
2012-2013	E	217
2012-2013	F	45
2012-2013	G	12
2012-2013	H	0
	TOTAL	6,162

2013/14 Student Properties

Year	Band	PropCount
2013-2014	A	1,673
2013-2014	B	1,341
2013-2014	C	2,214
2013-2014	D	708
2013-2014	E	232
2013-2014	F	42
2013-2014	G	14
2013-2014	H	1
2013-2014	TOTAL	6,225

2014/15 Student Properties

Year	Band	PropCount
2014-2015	A	1,634
2014-2015	B	1,381
2014-2015	C	2,215
2014-2015	D	703
2014-2015	E	241
2014-2015	F	44
2014-2015	G	21
2014-2015	H	1
	TOTAL	6,240

2015/16 Student Properties

Year	Band	PropCount
2015-2016	A	1,716
2015-2016	B	1,438
2015-2016	C	2,281
2015-2016	D	774
2015-2016	E	251
2015-2016	F	52
2015-2016	G	18
2015-2016	H	1
	TOTAL	6,531

2016/17 Student Properties

Year	Band	PropCount
2016-2017	A	1,794
2016-2017	B	1,514
2016-2017	C	2,344
2016-2017	D	786
2016-2017	E	293
2016-2017	F	52
2016-2017	G	13
2016-2017	H	1
	TOTAL	6,797

2017/18 Student Properties

Year	Band	PropCount
2017-2018	A	1,966
2017-2018	B	1,603
2017-2018	C	2,386
2017-2018	D	819
2017-2018	E	333
2017-2018	F	49
2017-2018	G	12
2017-2018	H	0
	TOTAL	7,168

2018/19 Student Properties

Year	Band	PropCount
2018-2019	A	1,900
2018-2019	B	1,550
2018-2019	C	2,365
2018-2019	D	801
2018-2019	E	313
2018-2019	F	47
2018-2019	G	14
2018-2019	H	0
	TOTAL	6,990