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**To: Scrutiny Coordination Board**

**Date: 22nd November 2017**

**Subject: Student Accommodation and University City Development**

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## **1 Purpose of the Note**

- 1.1 To inform the Scrutiny Coordination Board of the current position with purpose built student accommodation across the city and how that will relate to and support the growth in both the city's universities. The note also includes reference to policies and monitoring requirements within the emerging new Local Plan and City Centre Area Action Plan where appropriate.
- 1.2 This note is intended to be presented alongside information from both universities in relation to their own growth programmes and masterplans.

## **2 Recommendations**

- 2.1 The Scrutiny Coordination Board is recommended to:
  - 1) Note the information contained within this report; and
  - 2) Identify any further recommendations for the Cabinet Member

## **3 Information/Background**

### **3.1 The Planning Policy Framework**

- 3.2 The Council's planning policy currently comprises the 2001 Development Plan (as a starting point) and the emerging new Local Plan and City Centre Area Action Plan (AAP) (as material consideration). The new Local Plan and AAP will be presented to Cabinet on the 28<sup>th</sup> November and Council on the 5<sup>th</sup> December with a recommendation to adopt both as the new planning policy framework for Coventry. If approved at Council they will supersede the 2001 Development Plan the following day.
- 3.3 The new policy framework supports the principles of university growth with a view to it facilitating improved economic prosperity for Coventry. In developing both Plans the Council has worked closely with Coventry University, the University of Warwick, other key stakeholders and community groups to understand these growth requirements and their potential impacts as well as their benefits.
- 3.4 To support the expected and planned growth of both universities, the Local Plan sets out a policy direction that promotes purpose built student accommodation in close proximity to either campus. This is with a view to reducing the need to travel by car and ensuring close proximity to both the learning environment and other retail, community and recreational

provisions the city has to offer. Indeed the AAP in particular identifies a range of sites suitable for residential based development, of which some could be developed for student accommodation – something we are already seeing in some parts of the city centre.

- 3.5 A linked aim associated with the growth strategy for purpose built student accommodation is to reduce the pressure student households place on traditional family housing and their conversion to Homes in Multiple Occupation (HiMO's). Although not all HiMO's are occupied by students, we know that they do provide an affordable and attractive housing option to a number of students, especially in their 2<sup>nd</sup> or 3<sup>rd</sup> years at university and especially in the context of a lack of reasonable alternative options. This is where the increased offer of purpose built student accommodation is expected to have an effect as the current pipeline will significantly increase the availability and accessibility of high quality accommodation for students (regardless of their year of study).

### **3.6 Current Development Pipeline**

- 3.7 In 2005 there were approximately 24,500 full time students at the cities two Universities. More recent evidence shows that this had increased to approximately 43,000 full time students with more than 50,000 students in total in 2015<sup>1</sup>.
- 3.8 The 2005 study showed that approximately 10,500 (43%) of all full time students from both universities were in managed accommodation. Although the number of available bed spaces across the city increased by 26% between 2005 and 2014 (meaning there was sufficient number to accommodate in excess of 13,300 students) the proportion of bed spaces to full time students did not kept pace with the continued growth of the universities. This led to a decline in the number of full time students able to access purpose built accommodation (down to less than 35%).
- 3.9 Since 2014, the city has seen a stepped change in the level of purpose built student accommodation being promoted and developed. This is a clear market response to sustained growth in not only student population but also the status of both universities nationally and internationally. It has been accelerated by companies such as Study Inn, Unite and OXO student housing – as well as a revised approach by Coventry University in particular to invest in its own accommodation portfolio. New companies are also now looking to invest in the city such as Gilltown and Crosslane.
- 3.10 As a result and at the current time there are in excess of 8,000 new bed spaces with extant planning permission of which approximately 64% are currently under development or approaching completion. Sites such as Belgrade Plaza, Trinity Street, Bishop Street, London Road, Sky Blue Way and Manor Road are prime examples of current activity. They also follow in the footsteps of recent completions at the former AXA towers, Lower Ford Street and Far Gosford Street, the latter having opened its doors for the first time this September. In addition, proposals for a further 1,750 bed spaces are being considered through live planning applications and pre-application inquiries. There is no sign of current developer interest and demand slowing. We have also been advised by suppliers that demand for purpose built accommodation is not constrained to first year students and that it is increasingly becoming popular amongst 2<sup>nd</sup>, 3<sup>rd</sup> year and post graduate students, especially those travelling from abroad. Once completed the existing pipeline of schemes currently on site will significantly increase the level of access full time students have to purpose built student accommodation from approximately 35% to 50% of students by 2020 with further increases expected to follow. It should be noted however that the proportion of full time students with access to purpose built accommodation will depend on the extent of

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<sup>1</sup> Numbers are derived from the Higher Education Funding Authority database. They should therefore be read as maximum figures as Coventry University student numbers also include those studying at campuses outside of Coventry e.g. London and Scarborough.

student growth across the city. A small year on year uplift of approximately 1,500 students per annum (on average) has been assumed.

- 3.11 In addition to new build provision it is also worth noting improvements both universities are making to the quality of their residential offer. The University of Warwick has been delivering plans across its campus to regenerate and redevelop its halls of residence in recent years in line with its masterplan. Coventry University are also currently in the process of demolishing parts of Priory Halls as they have reached the end of their useful life. These losses have been factored into the assessments of purpose built provisions.
- 3.12 Notwithstanding the current growth projections for purpose built accommodation, we are advised by both universities that current provisions remain inadequate to meet demand and that more provision is required to help meet student needs. Both the Local Plan and AAP strongly promote purpose built student accommodation and will continue to do so in the coming years.

### **3.13 Monitoring and Future Expectations**

- 3.14 Looking forward, the new draft Local Plan makes a commitment to monitoring the completion and pipeline of purpose built student accommodation as well as the delivery of HiMO's and their concentration within different parts of the city. In order to maintain an up to date policy framework and ensure the policies within it are working appropriately and as intended it is vitally important that they are monitored on at least an annual basis.
- 3.15 In reaching her conclusions on both Plans, the Inspector has been quite clear that the monitoring frameworks be updated in line with the proposed modifications and that monitoring outputs be properly managed and results published when appropriate. Officers intend to publish the results of monitoring on at least an annual basis as part of the Council's Annual Monitoring Report. This is normally published towards the end of the calendar year and covers the preceding financial year.
- 3.16 The approach to monitoring student accommodation and HiMO's will include a rolling review of planning applications for change of use, conversion and new build provisions and a review of Council tax records to understand existing numbers and concentrations of HiMO's in particular. Gaining a wider understanding of concentration of HiMO's will help inform decision making and where necessary help defend the refusal of any inappropriate planning applications. The Council will also continue to work alongside the universities to monitor growth in student numbers and the demand for new accommodation. Both the demand and need for student housing (both HiMO and purpose built) is expected to form part of Council's new Housing Strategy (to be progressed during 2018).
- 3.16 The outputs of this monitoring are expected to show a continued increase in purpose built provision and a decline in HiMO conversions and occupancy within the student cohort. We are already seeing anecdotal evidence through the presence of continued 'To Let' signs (especially around the edges of the city centre) and landlord inquiries through the Council's Housing Options team that suggest student HiMO's and rooms within multiple occupancy properties are not being occupied to the extent they have been before. We expect to see this trend become increasingly common as new purpose built accommodation comes online in the next 12-24 months. Although signs of change are appearing, this will not be something that changes overnight. We will therefore need to ensure we work closely with private landlords and continue to support and facilitate a period of market adjustment.

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**Appendix:**

1. Purpose built student accommodation pipeline – currently being compiled

Site Address	Number of bed spaces	Status
The Old County Hall, Bayley Lane	18	permitted
Former Dairy Crest Harper Road	200	permitted
33 Parkside	217	permitted
Former Coventry and Warwickshire Hospital Stoney Stanton Road	291	permitted
Car park opposite Swimming Baths, Fairfax Street	1,117	permitted
St Patricks Road / Friars Road	583	permitted
Garages off Terry Road	48	permitted
Evening Telegraph Buildings, Corporation Street	385	permitted
50-60, Queen's Road	20	under construction
17-18 Queens Road	21	under construction
Regency House, 32 Queens Road	24	under construction
Theatre 1, Lower Ford Street	42	under construction
Cornerfield Cottage, Shultern Lane	42	under construction
5-7 Lower Holyhead Road	50	under construction
27-28 Queens Road	67	under construction
Former Allied Carpets building, Corporation Street	91	under construction
7 Manor Road	110	under construction
London Road Social Club 25 Paradise Street	155	under construction
Park Road / Manor Road	176	under construction
1 Raglan Street	347	under construction
Land bounded by Trinity Street, Palmer Lane & Hales Street	353	under construction
University of Warwick Campus	500	under construction
Queens Road / Regent Street	70	under construction
28, 54-56 & 58-74 London Road	568	under construction
Belgrade Plaza	600	under construction
Ultraseal Godiva Place Lower Ford Street	769	under construction
Land off Tower Street	1,116	under construction
24-26 Carter Road	24	under construction
83 Gulson Road	34	under construction
57-59 Lower Ford Street	12	under construction
<b>Totals</b>	<b>8,050</b>	<b>-</b>
<b>Number under construction</b>	<b>5,191</b>	
<b>% under construction</b>	<b>64%</b>	

Site Address	Approximate Number of bed spaces	Additional Comments
Site A	450	City Centre - pre-application inquiry
Site B	500	Edge of City Centre - pre-application inquiry

Former Canley Social Club Marler Road	452	Planning application submitted but not yet determined
Land bounded by Bond Street, Hill Street and Ryley Street	385	Planning application submitted but not yet determined
<b>Totals</b>	<b>1,787</b>	<b>-</b>

<b>All Site opportunities</b>	<b>9,837</b>
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