Oxford Student Needs Assessment

Final Report

Oxford City Council

August 2023

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1. INTRODUCTION

1.1 Oxford City Council ("the Council") has commissioned Iceni Projects ("Iceni") to prepare a technical report to inform the future Local Plan Policy position on student housing needs in the City.

The Objective of this Study

1.2 Oxford has a significant housing need but a constrained land supply, with different forms of development competing with one another. The City is one of the least affordable places to live in the country, and the Council has a history of successfully managing its housing market and restricting pressure from student growth on the general housing stock and availability of properties in the private rented sector within this. The adopted Oxford Local Plan (2019) includes policies that seek to guide and manage both growth in student numbers and the delivery of student accommodation, and where this is located.

1.3 In the current Local Plan 2036, Policies H8 and H9 work together to achieve this, preventing the colleges from bringing forward any further student-generating development if they exceed the thresholds of the number of students living outside of university owned or managed accommodation. The thresholds are 1,500 students for the University of Oxford from 2022; and a figure of 4,000-4,500 for Oxford Brookes living in non-university accommodation.

1.4 The Council is however now in the process of developing a new plan looking to 2040. Land supply remains constrained, and there is a need for updated evidence to inform consideration of how its policies should evolve.

1.5 The Study aim is to provide a robust evidence base from which consideration can be given to how to manage student accommodation in the future, including reviewing the threshold for the numbers of university students living outside of managed accommodation; and policies for the delivery of purpose-built student accommodation (PBSA).

Planning Policy Context

1.6 The National Planning Policy Framework ("the NPPF") sets out that achieving sustainable development means that the planning system has three overarching objectives: (1) social, (2) environmental and (3) economic. Within this context, the housing needs of different groups in the community, including students, are expected to be assessed and reflected in planning policies (NPPF Para 62).

1.7 The local authorities across Oxfordshire had been working together on a joint Spatial Plan 2050; however, in August 2022, it was announced that the districts had been unable to reach an agreement on the approach to planning for future housing needs. The preparation of a Joint Strategic Plan – the Oxfordshire Plan - has since been abandoned and the individual local authorities are in the process of reviewing their own individual Local Plans whilst continuing to liaise as appropriate with one another on cross-boundary issues.

1.8 Oxford City Council are in preparing a new Local Plan. The Local Plan, with a plan period to 2040, will set out the planning strategy for meeting the needs of the City, including managing the student accommodation needs.

1.9 The Oxford Local Plan 2036 provides the current policy guidance for student accommodation in the City. In the context of a constrained land supply in Oxford, an unmet housing need and competing development pressures, it seeks to prioritise the delivery of general C3 housing, and in particular the delivery of affordable housing, and to control the development of student housing. The key policies related to student housing are Policies H8 and H9. These are summarised below:

Policy H8: Provision of new student accommodation	• Planning permission of new student accommodation will only be granted in locations that are on or adjacent to the existing university or college campus, in the city centre or on a site which is allocated in the development plan. • Further, planning permission will only be granted for student accommodation if, student accommodation will be restricted in occupation to full-time students enrolled in courses of one academic year or more and will be of 20 or more bedrooms. • Planning permission will not be granted for developments that would lead to the loss of student accommodation unless new student accommodation is available for occupancy within a reasonable timeframe.
Policy H9: Linking the delivery of new/redeveloped and refurbished university academic facilities to the delivery of university-provided residential accommodation	• Planning permission will only be granted for new/redevelopment of refurbished academic, research or administrative accommodation for the University of Oxford where it can demonstrate that the new accommodation would not generate or facilitate the increase in student number or that the number of their full-time students living in Oxford at non-university accommodation does not exceed 2,500. This threshold will be reduced to 1,500 at 1st April 2022. • For Oxford Brookes, planning permission for new academic space again will also be granted if the no increase in students

	is demonstrated. However, the number of full-time students living in Oxford in non-university provided accommodation should not exceed 4,000 at the time of the application. The threshold will increase to 4,500 if on 1st April 2023 a scheme to net increase of student bedrooms has not been developed at Clive Booth Student Village and/or Oxford Brookes is able to demonstrates that they are unable to secure additional nomination rights. • The reference to students not living in accommodation provided by either University of Oxford or Oxford Brookes excludes those students who were residents in Oxford before applying to study at the university and continue to live at their pre-application home address while studying.

1.10 Policy H9 only applies to university students on full-time taught degree courses of an academic year or more, as these are the categories of student the Council deem most suited or likely to living in student accommodation. Therefore, student teachers, medical students, placement students and post-graduate research students are not among those covered by the policy as they could also be deemed as employees of the university.

1.11 These student accommodation policies were based on the evidence base conducted in January 2017 in the Cambridge Centre of Housing & Planning Research (CCHPR) *Assessment for Student Housing Demand and Supply,* which was prepared for Oxford City Council. This report expected student growth at each university of 1 to 2% per annum. The assessment also found that 37% of all students in Oxford are at various other non-university institutions.

1.12 The principal effects of the policy framework have been to control the locations and occupancy of new student accommodation in Oxford; and to limit growth in students at the universities who would result in additional accommodation needs. The Council needs to consider through the preparation of the new Local Plan 2040 whether these policies remain appropriate.

Educational Institutions in Oxford

1.13 For the purposes of this Assessment, the types of educational institutions that have been assessed can be separated into two groups: university institutions and non-university institutions. These are set out below, and listed fully in **Appendix 1**. The Study focuses particularly on the two universities.

University of Oxford

1.14 The University of Oxford was established in 1096 and has built a global reputation for academic excellence. The University operates via a college structure: there are 44 colleges. This includes 5 permanent private halls[1]. Each college is located within Oxford with a few located slightly further out of the City Centre (as shown in Figure 2.1). Typically, the colleges provide accommodation.

Oxford Brookes University

1.15 Oxford Brookes University currently has four campuses, of which two are in Oxford and one just outside Oxford in the Vale of White Horse. The campuses are:

- **Headington Campus**: This is the largest campus located 1 mile to the east of Oxford City Centre. The campus offers a mix of learning spaces, the main library and a wide range of accommodation options;
- **Marston Road Site**: This campus sits 1 mile to the east of Oxford City Centre and provides facilities for healthcare courses;
- **Harcourt Hill Campus:** Located 3 miles from Oxford City Centre, the site offers certain courses as well as on-site accommodation; and
- **Swindon Campus:** Located in the Delta Business Park in West Swindon, the Site is in the vicinity of the Great Western Hospital. The campus opened in Feb 2017 and offers specialist academic facilities.

1.16 There is a further campus – the **Wheatley Campus** – located seven miles east of Oxford City Centre, however, this Campus is being decommissioned. The site is allocated for residential development in the South Oxfordshire Local Plan and planning permission for redevelopment to provide 500 homes was granted at appeal in April 2020. The University has now agreed to sell the site to Crest Nicholson and is relocating remaining activities over the period to Autumn 2024 to a purpose-built facility on the Headington Campus[2].

Language Schools

1.17 The City has several language schools that attract students from all around the world. A variety of courses are on offer including part-time and full-time, one-off courses to month-long courses, one-

[1] Permanent Private Halls (PPHs) have been founded by various Christian denominations and still retain their religious character.

[2] Oxford Brookes (2023) Oxford Brookes University, Our Campuses

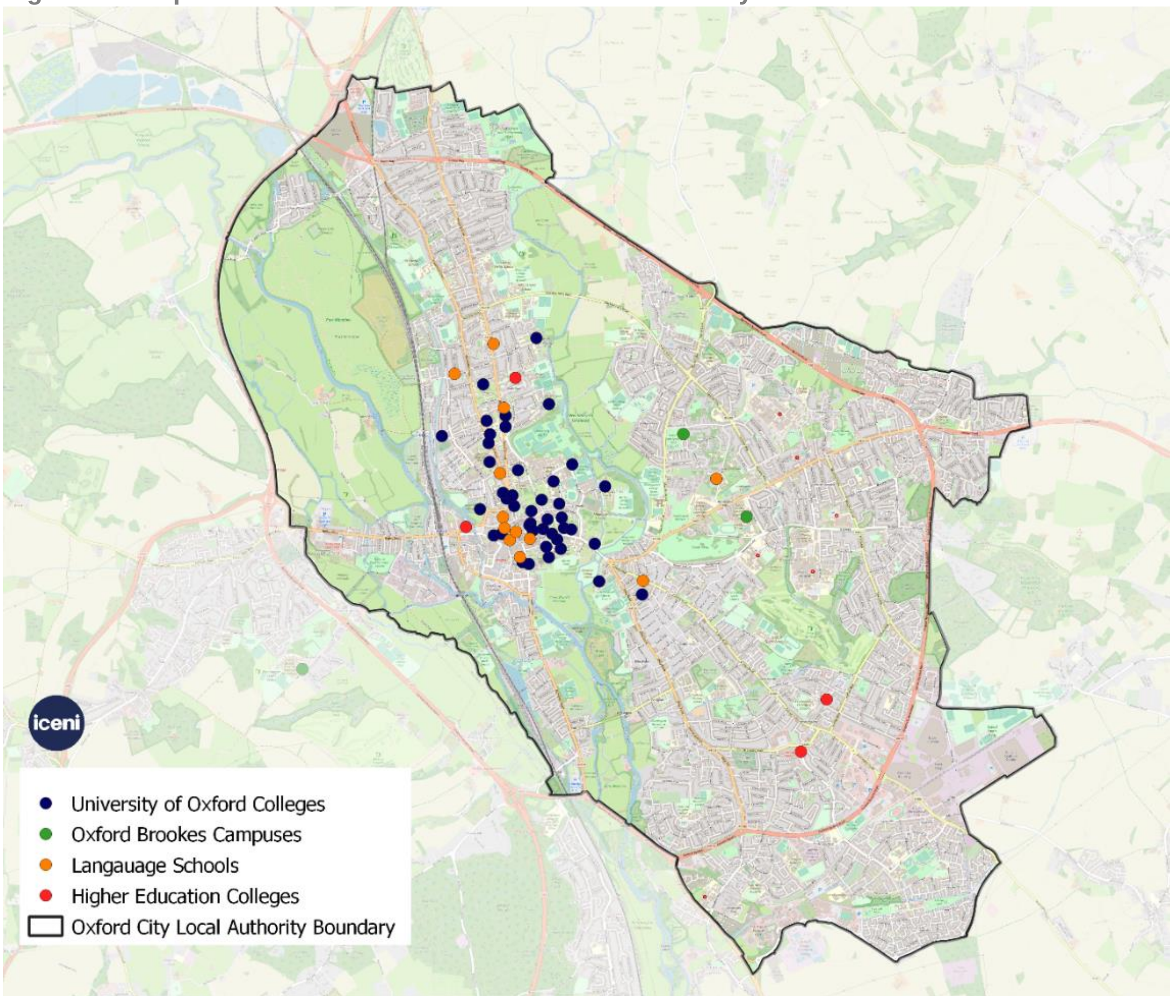
to-one sessions, or group classes. Excluding language schools which offer online-only courses, there are 11 language schools which are based in Oxford[3].

Further Education (FE) Colleges

1.18 Further Education Colleges include any study after secondary education that is not part of higher education (i.e. that is, not taken as part of an undergraduate or graduate degree). Courses range from basic English and Maths to Higher National Diplomas. Within Oxford, there are five FE colleges which provide a range of qualification outcomes for their students.

1.19 As the map below shows, FE and University institutions within Oxford are focused particularly in the city centre; and running north from it close to the Woodstock and Banbury Roads.

Figure 1.1 Map of all Institutions Assessed within the Study



Source: Iceni Analysis, 2023

[3] These are listed in Appendix 1.

Assumptions and Limitations

1.20 The data used in this Assessment comes from both primary and secondary data sources. The primary data sources include an online survey that was used to collect data from the individual institutions about their student profile, current accommodation provision and future planned provision. Limitations of the survey include uncertainty around the information provided substantial gaps in the survey responses from institutions in the City and limited details on future growth plans.

1.21 The secondary data sources used include data provided by the Higher Education Statistics Agency (HESA) which we have used to provide an understanding of the student profile at the University of Oxford and Oxford Brookes University. Students' numbers are taken over the reporting period, 1st of August to 31st of July.

1.22 There is a difference in the student numbers reported by HESA and the Universities. This is because the HESA data reports on "student instances" so a student who has completed one course and stated a different course in the same academic year will count as two "student instances." This has the potential to therefore slightly overstate the number of students. In contrast, the Universities' data presents a "snapshot" of the total number of students at a single point in time.

1.23 In addition to the above data sources, the Study has considered information available from the 2021 Census on numbers of full-time students aged 18 and over in Oxford. The Census data does not however differentiate between different types of students, including those who are still at school or college (such as 18 year olds) and those studying at the HE institutions.

1.24 Iceni and the City Council has sought to engage with the two universities in the preparation of the Study to understand the make-up of the student population, trends in student growth and the future planned or potential growth in the student population. A number of meetings have been held to discuss these areas including:

- Seminar explaining Study purposes and information needs – 4th November 2022
- Meeting with Oxford University, Oxford Brookes and their consultants – 21st March 2023
- Follow-up Meeting with the Universities and their consultants – 5th May 2023

1.25 For commercial reasons, the two universities have ultimately been unable to release their detailed modelling scenarios for future growth in the student population and accommodation needs, but have shared summary figures with the City Council and Iceni in early July 2023. This has informed the Study. The lack of detailed data and responses to some of the queries which Iceni has raised as part of the engagement process should however be noted and has necessitated a number of assumptions to be made within this Study which are set out in subsequent sections.

1.26 In respect of the non-university institutions, the Survey undertaken elicited a limited response. Therefore, in some instances, inspection reports from either Ofsted or The British Council have been used to provide information about the student population. A full list of sources used for this study is provided throughout, with a comprehensive list of each education institution's source provided in **Appendix A1**.

1.27 Iceni are aware that there are more language schools and FE colleges than analysed within this Study. The non-university institutions within this study have been selected because they have engaged with the Study, we have spoken to them over the phone, or they have an active online presence with a British Council report. Institutions may have not been considered if they are deemed too small (e.g. only provided 1-2-1 classes for Oxford only residents) or provide online-only courses but have an office based in Oxford. Secondary Schools have not been considered as part of this Study.

Structure of the Report

1.28 The report is structured to address in turn the following:

- Section 2: The Profile of Students in the City;
- Section 3: The Existing Student Accommodation Profile;
- Section 4: Future Expansion Plans; and
- Section 5: Summary and Conclusions.

2. THE PROFILE OF STUDENTS IN THE CITY

2.1 This section considers the profile of students residing in Oxford City, drawing on published datasets along with the results from the online survey to understand the current numbers of students and emerging trends.

Universities Student Profile

Census Data

2.2 In Oxford at the point of the 2011 Census, there were 29,924 full-time students aged 18 and over. This had increased by 10% in the 2021 Census to a total of 32,888 full-time students. This equated to around 20% of the City's population.

2.3 It should be noted that due the timings of the 2021 Census during the Covid-19 pandemic, lockdown restrictions at the time of the Census in March 2021 meant that many students may not have returned to their term—time university addresses by Census day. As such the 2021 Census may underrepresent the number of students living in Oxford and the overall student population.

2.4 The Census does not disaggregate between Higher Education and Further Education students, but does provide data on housing circumstances as can be seen in the table below. A clear majority of students in Oxford live in University-linked communal establishments at 54%, followed by student only households which are likely primarily to be HMOs at 24%.

Table 2.1 Student Accommodation

	Number	Percentage
Living with Parents	2,220	7%
Living in a Communal Establishment	18,274	56%
Communal: University	17,905	54%
Communal: Other Communal	369	1%
Living in an all Student Household	7,972	24%
Living Alone	884	3%
Living in Other Household Type[4]	3,538	11%
Total	32,888	

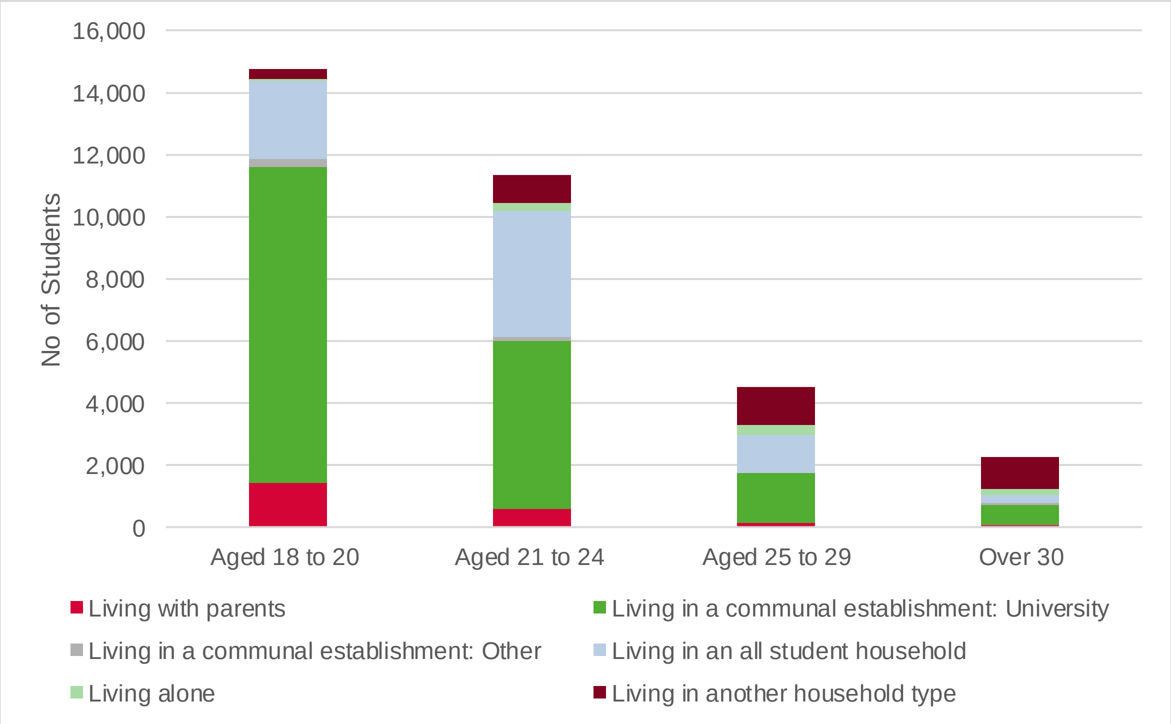
Source: Census 2021

[4] This will include shared accommodation/ HMOs.

2.5 The Census allows this data to be split by age group and the figure below demonstrates how each age group differs in terms of their living circumstances. What is very clear is that a large majority of students aged 18 to 20 live in university-linked student accommodation at 69%, followed by those living in all student households at 16.9%. This gap closes slightly in the 21-24 group with 47.9% in university-linked student accommodation and 35.6% in all student households and closes even further in the 25-29 group at 35.8% in communal accommodation and 26.2% in student households.

2.6 Largely this demonstrates that communal university accommodation, while being the most common across the age groups, does decrease in popularity as students age. More undergraduates are likely to live in University accommodation or PBSA than post-graduates. Partly this will be a factor of many first years who are most likely to sit in the 18-20 age group moving out of student halls in their latter years of their courses and into HMOs. It may also be an impact of full-time postgraduate students, particularly those who are from Oxford or studied undergraduate degrees in Oxford, and prefer not to live in student halls.

Figure 2.1 Student Accommodation by Age



Source: Census 2021

HESA Data Analysis

2.7 Data from the Higher Education Statistics Agency (HESA) tracks trends in student numbers and the type of courses they are studying for the University of Oxford and Oxford Brookes from the last eight years 2014/15 to 2021/22. As stated in the limitations section, the student numbers reported via HESA records 'student instances' and not a headcount; and the data also does not disaggregate between students studying at the main university campus and satellite campuses. As such with data for Oxford Brookes in particular, HESA data will include students who are primarily based outside of

Oxford City's administrative area at the Swindon or Wheatley campuses. Data from the AMR however indicates that student numbers at the Swindon are modest (c. 260 students in 2021/22).

2.8 In the academic year 2021/22, the two universities had a combined total of 44,760 students full-time ("FT") and part-time ("PT") undergraduate and postgraduate students. The total number of students breaks down to a ratio of 39% of students studying at Oxford Brookes University (17,470 students); and 61% from the University of Oxford (27,290 students).

2.9 Over the last 8-year period (2014/15 – 2021/22), student instances at Oxford Brookes have increased modestly by 335 students, or 1.9%; whereas the University of Oxford has seen an increase of 1,145 students which is around a 4.4% growth from the 2014/15 instances.

2.10 The trend for Oxford Brookes shows that student instances peaked in 2015/16 at 17,865 students and has remained relatively stable since – despite the opening of a new campus in Swindon. After this academic year, student instances fall reaching the lowest numbers in 2018/19 of 16,655 students which is a fall of 7% since the peak. Although there are differences year on year, these are minor, with total student instances at Brookes being largely stable. There will however have been changes between its campuses with the opening of a campus in Swindon and wind down of the Wheatley Campus.

2.11 There was a fall in student instance from 2020/21 to 2021/22: this is likely an impact of lower first year student recruitment as A-Level marking was not impacted by Covid-19.

2.12 For the University of Oxford, student instances appear to be falling until 2016/17 when they were at their lowest (24,650 students). Since then student numbers have grown year on year, with a particularly large increase between 2019/20 and 2020/21. Again, this increase is likely a factor of increased first year student recruitment which would have been impacted this year by the change in A-Level marking resulting in almost all students achieving their predicted grades and therefore being able to take up their offer.

Figure 2.1 Profile of Oxford and Oxford Brookes Student Population, 2014/15 to 2021/22

Source: Iceni Analysis of HESA Data, 2023

2.13 The table below shows the ages of students at each of the universities in the 2021/22 year. The age profile of students clearly differs between the two, with Brookes seeing a much higher proportion of Under 20's than the University of Oxford and a slightly higher proportion of 21-24 year olds. This switches in the over 25 age groups, where The University of Oxford sees a higher proportion. This likely reflects a higher incidence of post graduate students at the University of Oxford. There are generally more students over 30 than between 25-30; this will be a function of that being a much larger age range overall.

Table 2.2 Age Group Split

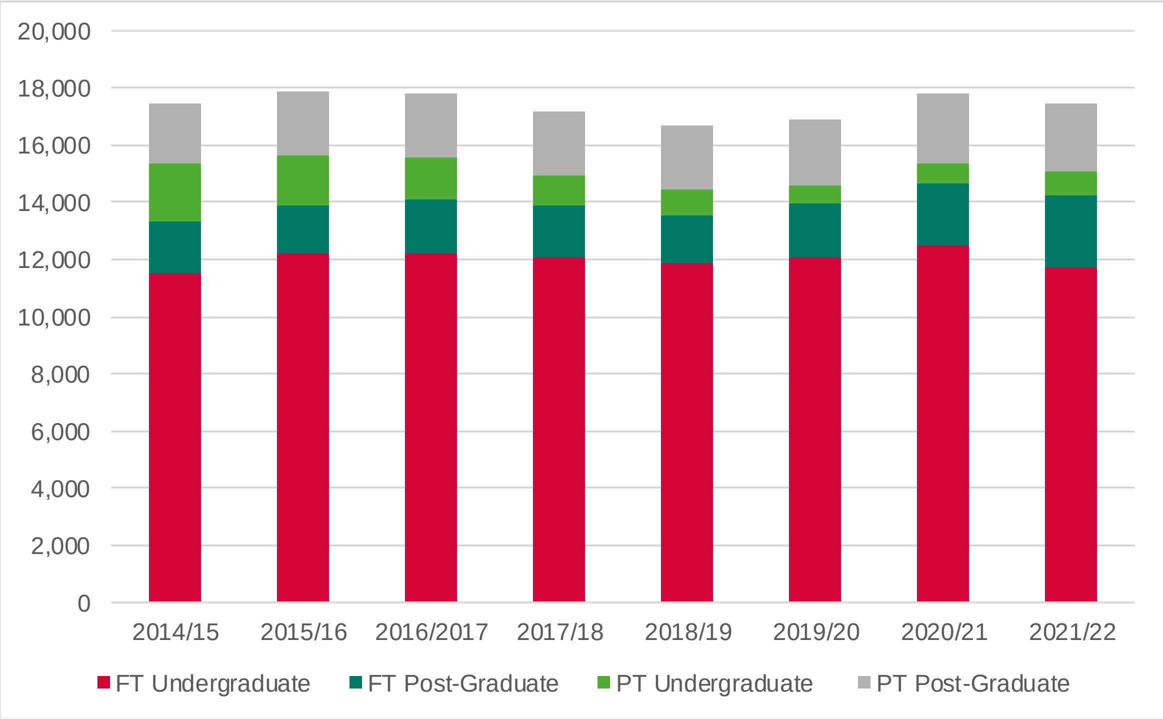
	Oxford Brookes		The University of Oxford	
Age band	**Number**	**%**	**Number**	**%**
Under 20	7,600	43.5%	9,320	34.2%
21-24	4,770	27.3%	7,350	26.9%
25-30	1,875	10.7%	4,095	15.0%
Over 30	3,230	18.5%	6,520	23.9%
Total	17,475		27,285	

Source: Iceni analysis of HESA Open Data

2.14 When looking at the break down of full and part time students at both undergraduate (UG) and post-graduate (PG) level both institutions see the majority of their student intake from full-time undergraduate students. Accommodation requirements are expected to arise primarily from full-time students as they are more likely to live and study in Oxford full-time.

2.15 For Oxford Brookes University, the level of full-time undergraduates has remained consistent throughout the recorded period. However, there is a notable change in the number of part-time undergraduate students which sees a 61% fall in between 2014/15 and 2021/22, from over 2,000 to just 795. This appears to have been replaced by increases in full-time and part-time postgraduate students with the number of full-time postgraduates in 2021/22 exceeding that of part-time at 2,540 and 2,425 respectively.

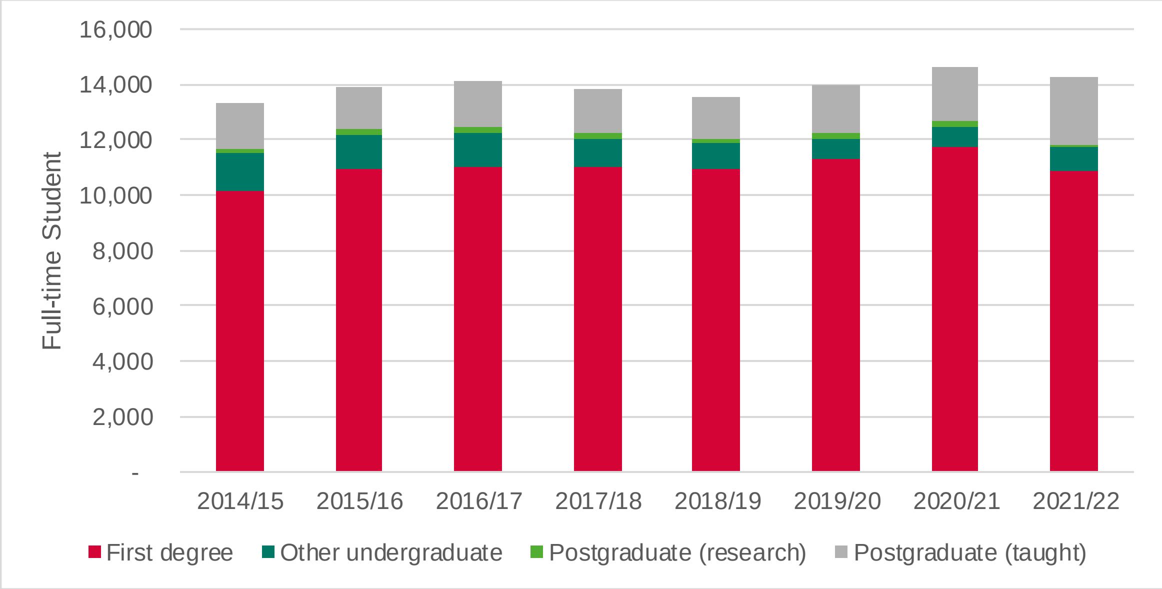
Figure 2.2 Profile of Oxford Brookes Students from 2014/15 to 2021/22



Source: Iceni Analysis of HESA Data, 2023

2.16 The trend for full-time students at Oxford Brookes is shown below. Again, this has remained relatively stable over time. The slightly higher numbers in the most recent two years are potentially influenced by the Covid-effects on admissions.

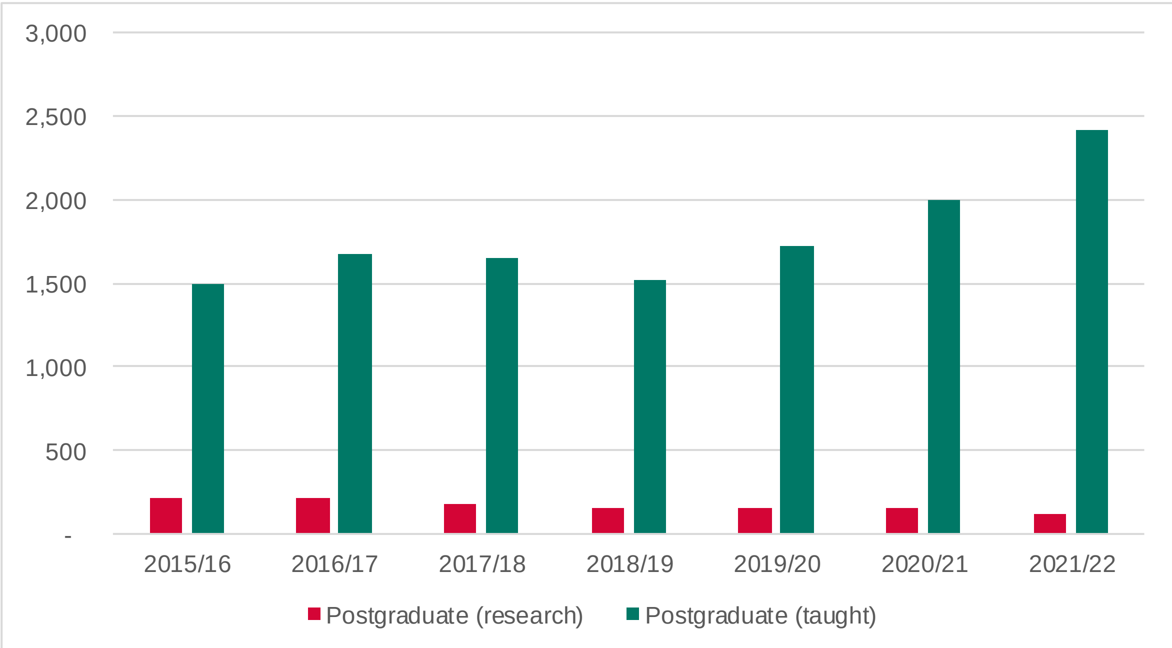
Figure 2.3: Trend in Full-time Students at Oxford Brookes



Source: Iceni Analysis of HESA Data, 2023

2.17 The figure below shows the change in postgraduate students by level of study over time. There is a very clear increase in the number of taught PG students over this time period with a very slight decrease in PG research students. This is likely an impact of changing recruiting patterns for the University.

Figure 2.3 Oxford Brookes, Change in Post-Graduate Students, 2015/16-2021/22



Source: Iceni analysis of HESA Open Data

2.18 The mode and level of study of Brookes students in 2021/22 can be seen in the Table below. A majority of students are full-time and undergraduate at 67.1%. There are significantly less part-time undergraduates at only 4.6%. Postgraduate students are much more equal across full-time and part-time albeit with slightly higher instances seen for full-time students. Overall 82% of those studying at Oxford Brookes (across its various campuses) are on full-time courses.

Table 2.3 Oxford Brookes, Level and Mode of Study 2021/22

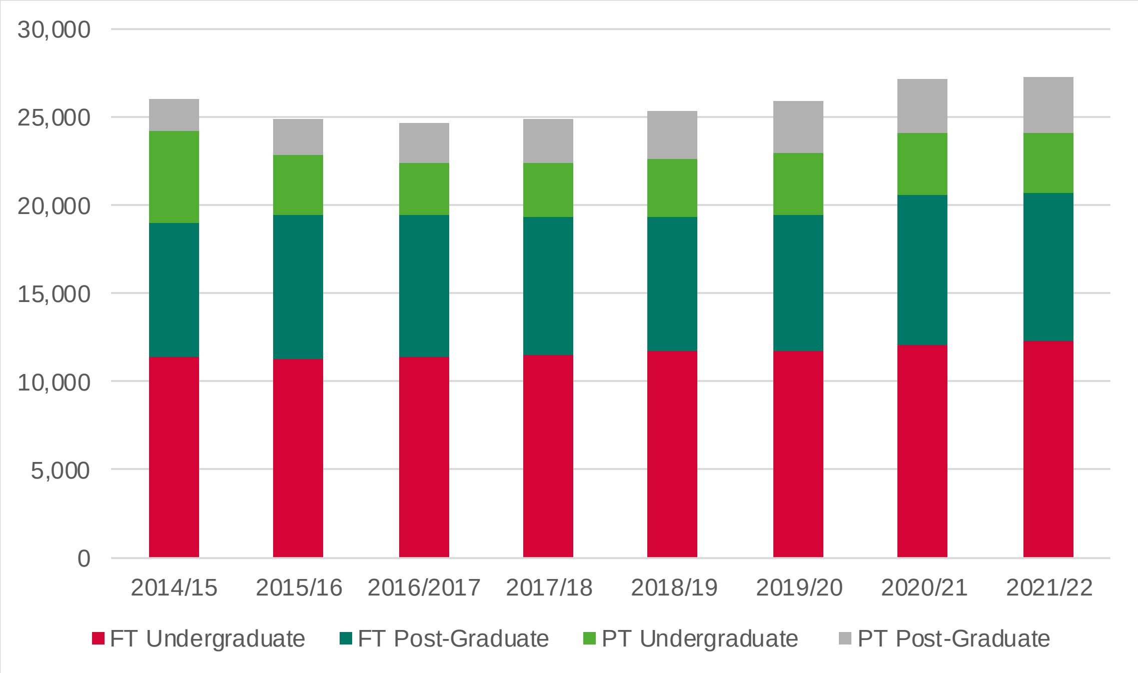
	Full-Time		Part-Time	
Level of Study	Number	% (of total students)	Number	% (of total students)
Undergraduate (Total)	11,715	67.1%	795	4.6%
First Degree Undergrad	10,905	62.4%	505	2.9%
Other Undergraduate	815	4.7%	290	1.7%
Postgraduate (Total)	2,540	14.5%	2,425	13.9%
Postgraduate, Research	125	0.7%	170	1.0%
Postgraduate, Taught	2,415	13.8%	2,250	12.9%
Total	14,255	81.6%	3,215	18.4%

Source: Iceni analysis of HESA Open Data

2.19 The University of Oxford displays a similar pattern in terms overall student growth, albeit to a lesser extent. The number of part-time undergraduate students saw a fall of just under a third (1,745 students) in the 8-year period to 2021/22. This has largely been accounted for in the number of part time post-graduates, which increased by 67.5% (1,385 students).

2.20 There was a particular increase in the student numbers from the 2019/20 to 2020/21 academic year as an impact of the Covid-19 lockdown and anomalies in A-Level marking in Summer 2020: the number of full-time undergraduates increased by over 400. This has dropped somewhat into the 2021/22 year, with a slightly smaller increase of 135 full-time undergraduates; however undergraduate number remain high.

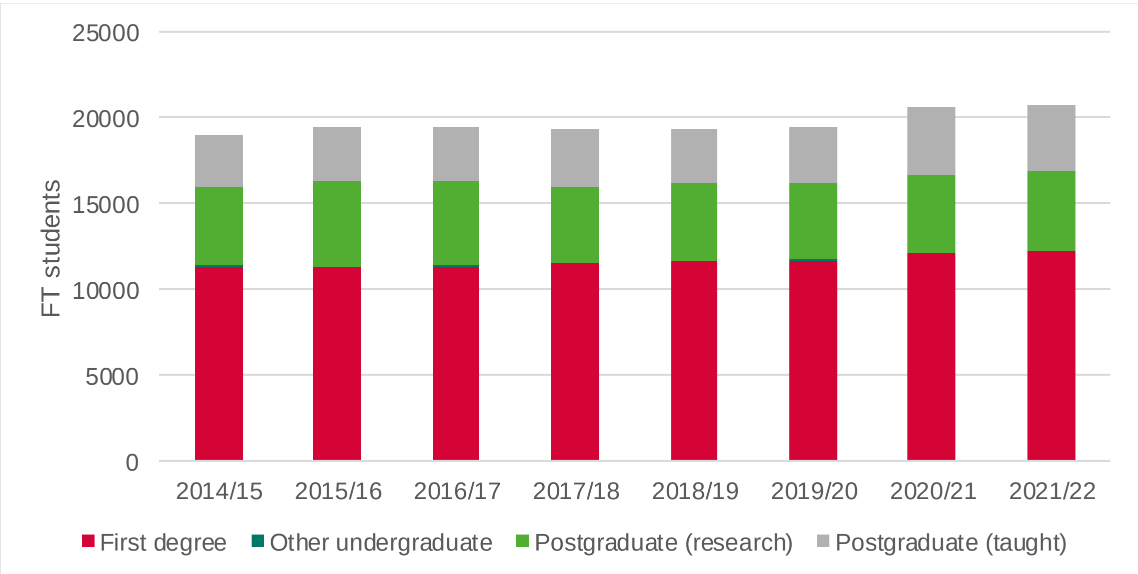
Figure 2.4 Profile of University of Oxford Students from 2014/15 to 2021/22



Source: Iceni Analysis of HESA Data, 2023

2.21 If we again split out the full-time student instances in the HESA data, again we see a pattern of relative stability in full-time student numbers, with an uplift in the last two years shown which is potentially influenced by Covid-related factors on admissions – with offers accepted on predicted grades.

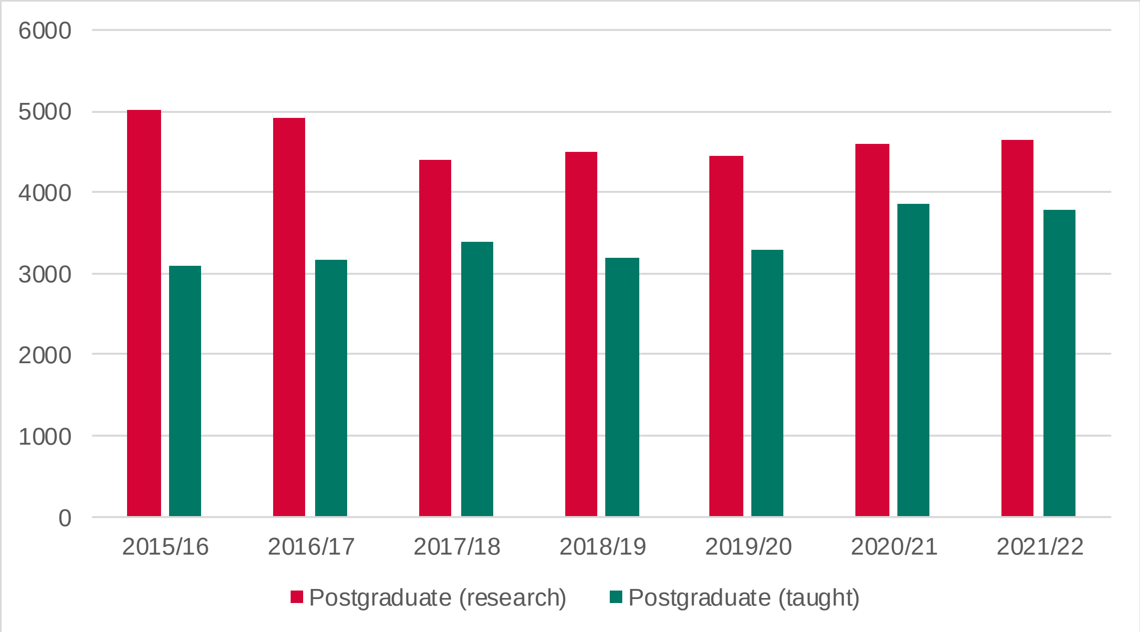
Figure 2.5: Trends in Full-time Students at University of Oxford



Source: Iceni Analysis of HESA Data, 2023

2.22 The Figure below shows the change of the number of PG research and taught students since 2015/16. The gap between the levels of research and taught students has decreased over time with research PGs decreasing and those on taught-based PG courses increasing. Much like with Brookes, this is likely to indicate changing recruiting patterns of postgraduates as well as potentially changes in courses offered which allows for an increased number of taught students.

Figure 2.5 University of Oxford, Change in Post-Graduate Students, 2015/16-2021/22



Source: Iceni Analysis of HESA Data, 2023

2.23 When the level and mode of study are broken down further, it can be seen that while full-time undergraduates are the largest group, full-time postgraduates are not far behind. Within the postgrad research cohort, students are more likely to be full-time than part-time. This is likely a factor of the level of study, postgraduate research students are typically studying for Doctorate degrees, which are often full-time and can occasionally be funded by stipends or loans which cover living costs therefore meaning an additional job is not needed. Some PG research students in the latter stages of their courses may also be involved in paid teaching, tutoring or research.

2.24 The full-time/part-time split is much more even with postgraduate taught (Masters) students, although there are more studying full-time than part-time. Again this is likely a factor of funding where Masters degree loans are less than Doctoral; and additionally course lengths are much shorter and may allow more leeway for a student to work alongside learning.

Table 2.4 University of Oxford, Level and Mode of Study 2021/22

	Full-Time		Part-Time	
Level of Study	**Number**	**% (of total students)**	**Number**	**% (of total students)**
Undergraduate (Total)	12,270	45.0%	3,415	12.5%
First Degree Undergrad	12,250	44.9%	20	0.1%
Other Undergraduate	20	0.1%	3,395	12.4%
Postgraduate (Total)	8,425	30.9%	3,185	11.7%
Postgraduate, Research	4,645	17.0%	425	1.6%
Postgraduate, Taught	3,780	13.9%	2,760	10.1%
Total	20,690	75.8%	6,600	24.2%

Source: Iceni Analysis of Open HESA Data, 2023

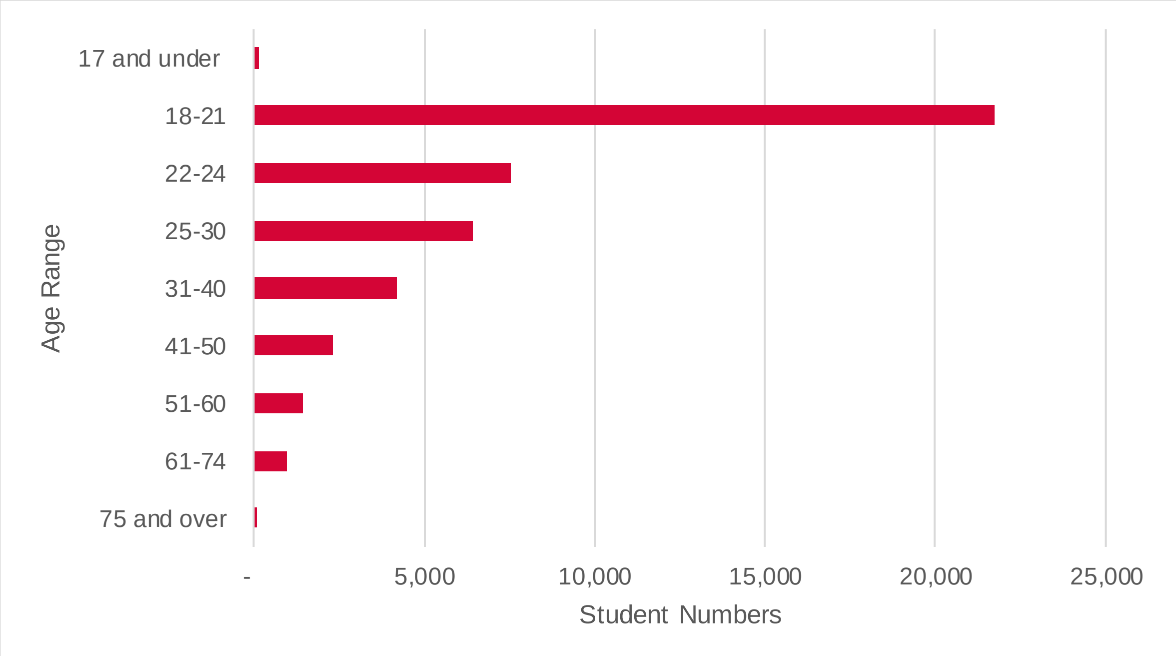
2.25 Influenced by the Covid-19 pandemic, distance student learning has emerged as an increasingly popular way to study. HESA data records the split between distance and non-distance learning for both universities. The University of Oxford has generally seen higher numbers of distance learners than Oxford Brookes, likely a factor of its status. What is clear is that both universities saw increases in distance learners in the 2020/21 academic year with the number of distance learners at the University of Oxford increasing by almost 3,000 with a more modest growth at Brookes of 270. Although a majority of this is within the part-time cohort, there was a jump of 310 distance learners studying full-time at the University in 2020/21. Figures for the 2021/22 academic year have dropped to 6,530 at the University of Oxford and 1,670 at Brookes remaining reasonably high and showing the lasting effects of Covid on teaching.

Figure 2.6 Number of Students that Complete Distance Learning

Source: Iceni Analysis of HESA Open Data, 2023

2.26 HESA data provides the ages of students studying at the University as at the 31st of August in the reporting period. Just under half of all students (48.4%) are between 18 and 21 years old. Overall, 80% of students are aged between 20 and 30 years of age, with the number of students reducing from the peak student age of 21.

Figure 2.7 Age Profile of Students from both Universities



Source: Iceni Analysis of HESA Data, 2023

2.27 The profile of students by origin is influenced by a range of factors, including demographic factors (which influence UK students for instance); national Government policies around Visas; student fees (which differ for domestic and international students); and the growth/ recruitment strategies of the HE institutions.

2.28 Our analysis shows that there has been a significant change in the origin of students with a notable increase in the number of non-EU international students with a growth of 12% between 2015/16 and 2020/21. However, for the EU students, there has been a fall in student numbers by 2.5%: this is likely linked to Brexit-related uncertainties regarding Student Visas and increases in fees for EU international students.

2.29 Survey responses of FE institutions show that many institutions believe that changes to Student Visa rules would impact demand, particularly if they were made harder to obtain as demand would reduce.

2.30 The tables below show the change in domicile of students at the universities from the 2014/15 academic year, which was prior to the EU referendum, and the most recent academic year 2021/22. Oxford Brookes sees a notable decrease in EU students in this time however this is likely partly a factor of the lower starting point, UK based students have also decreased slightly. The loss in EU and UK-originating students at Brookes has been made up for in an increase in Non-EU students.

Table 2.5 Oxford Brookes, Change in the Domicile of Students, 2014/15 to 2021/22

Domicile	2014/15	2021/22	Change	%
UK	14,205	14,160	-45	-0.3%
EU	930	860	-70	-7.5%
Non-EU	2,330	2,455	125	5.4%
Total	**17,460**	**17,470**	**10**	**0.1%**

Source: Iceni Analysis of HESA Data, 2023

2.31 The change in student domicile at the University of Oxford is somewhat similar – the number of UK based students has decreased and non-EU students has increased. It would appear that a majority of the growth at the University between 2014/15 and 2021/22 has been from non-EU students. In contrast to Brookes, the University does not see a decrease in EU students with the number increasing minimally. This is likely a factor of Oxford's reputation as a globally recognised institution where many EU based students who had their sights set to attend Oxford would have done so regardless of the outcome of the EU referendum.

Table 2.6 University of Oxford, Change in the Domicile of Students, 2014/15 to 2021/22

Domicile	2014/15	2021/22	Change	%
UK	18,660	18,030	-630	-3.4%
EU	2,400	2,415	15	0.6%
Non-EU	4,945	6,845	1,900	38.4%
Total	**26,005**	**27,290**	**1,285**	**4.9%**

Source: Iceni Analysis of HESA Data, 2023

2.32 There is also a factor of changing fee structures that would impact the international make up of each university. Prior to Britain officially leaving the EU in January 2020, EU students were charged 'home student' fees equating to £9,250 per year. As of the 1st of August 2021[5] EU residents studying at a UK university were subject to higher International (Non-EU) student fees and were no longer eligible to apply for Student Loan funding in the UK. EU students are also now required to apply for student visas to study in the UK.

2.33 International fees are not limited as home student fees are: as such they differ between the two universities and also depend on the course attended. The University of Oxford's website quotes fees

[5] What has changed for international students since Brexit? | Student (timeshighereducation.com)

at anywhere between £28,950 and £44,240. The table below shows a sample of courses and the fees charged to international students. A matching UCAS code between the two universities denotes that the course offered is the same in terms of general structure.

2.34 What is clear is that perceived higher value courses, which are usually STEM based, see higher fees at the two universities. One exception to this is Music which sees a higher fee at the University of Oxford, this is likely a factor of the status of the Music Faculty at the University which is internationally renowned. The University of Oxford also sees much higher fees on average than Oxford Brookes, again likely a factor of its status.

Table 2.7 International Undergraduate Full-Time fees by course, 2023 entry

	University of Oxford (UCAS code)	Oxford Brookes (UCAS Code)
Biomedical Sciences	£38,670 (BC98)	£16,100 (B900)
Mathematics	£37,380 (G100)	£15,200 (G100)
History	£35,080 (V100)	£15,200 (V100)
Music	£39,740 (W300)	£15,200 (W300)
Median Average	£38,025	£15,200

Source: University of Oxford and Oxford Brookes websites

2.35 The growth in international students coupled with the higher fees that can be charged to them by the universities indicates a change in recruitment tactics. Consultation with Oxford Brookes for example has established that they intend to continue to recruit non-EU internationally – with key markets from which growth in students is expected being India and Nigeria.

Annual Monitoring Report Data Analysis

2.36 To inform the Council's yearly Authority Monitoring Report (AMR), both universities provide information relating to their student numbers and the number of student accommodation rooms they provide to the City Council. This is so the Council can monitor how many students are living outside of university-provided accommodation and meet the thresholds set in Policy H9.

2.37 The AMR data relates to in full-time students who (notionally) would have accommodation requirements. Therefore, the data is presented with the total student numbers as recorded by the Universities (in December of that academic year) and then a series of 'agreed exclusions' which have been applied to the total student numbers to meet the Local Plan definition of a full-time student who has accommodation requirements.

2.38 In the 2021/22 year a number of agreed exclusions applied to the AMR data. These are:

- Part-time and short-course students;
- Students studying a Further education course or a foundation degree;
- Students studying a research based post-graduate degree;
- Vocational course students who will at times be training on work placements;
- Students with a term-time address outside of the City (OX1, 2, 3, 4 postcodes);
- Students living within the City (OX1, 2, 3, 4 postcodes) prior to entry onto a course;
- Students not attending the institution or studying at a franchise institution;
- Students studying outside Oxford (e.g. OBU students studying at the Swindon campus);
- Students on a year abroad and other placement students away from the University ;

2.39 The University of Oxford is also subject to the following exclusions:

- Specific course exclusions (BTh Theology and MTh Applied Theology); and
- Students who also have an employment contract with the University.

2.40 Oxford Brookes University is also subject to the following exclusion:

- Students in Private Student only accommodation,

2.41 The agreed exclusion and their wording changed in 2019/20 in order to simplify the process and standardise the exclusions across the two universities. Both universities and the Council agreed to these changes. Three new exclusions were introduced at the University of Oxford: there were for those students studying outside Oxford and on Vocational or Further Education courses. One was removed which excluded those students living with their parents. The wording was also slightly changed on one exclusion from "Students who are also members of staff" to "Students with an employment contract with the University".

2.42 A total of five new exclusions were agreed for Oxford Brookes: those newly excluded are those students on Further Education and Vocational Courses; research based post-graduates; students living within the City prior to entry; and those in Private Student only accommodation.

2.43 The most recent Oxford Authority Monitoring Reports show both Universities as meeting the threshold for students living outside of non-university accommodation set out in the Plan. The data returns including the number of exclusions are set out in the table below.

Table 2.8 Authority Monitoring Report 2021/22

	Uni of Oxford	Oxford Brookes
Total Students	26,439	16,199
Part-time and short-course students	3,797	2,616
Students studying a Further education course or a foundation degree	0	99
Students studying a research based post-graduate degree	6,551	153
Vocational course students who will at times be training on work placements	189	1,718
Students with a term-time address outside of the city (OX1, 2, 3, 4)	537	1,703
Students living within the city (OX1, 2, 3, 4) prior to entry onto a course	200	325
Students not attending the institution or studying at a franchise institution	56	905
Students studying outside Oxford (i.e., Swindon campus)	0	262
Students on a year abroad and other placement students away from the university	215	307
Specific course exclusions (BTh Theology and MTh Applied Theology)	21	N.A.
Students who also have an employment contract with the university	0	N.A.
Students in Private Student only accommodation	N.A	317
Students with accommodation requirements	**14,873**	**7,794**
Accommodation places provided	**13,382**	**5,161**
Total students outside of Uni accommodation	**1,491**	**2,633**

Source: Oxford City Council

2.44 Our understanding is that there is however a distinction between the approach the two institutions have been taking to counting accommodation places in their monitoring data. Oxford University has been excluding accommodation places which are occupied by those in excluded categories – which as the table above shows, particularly relates to those on research-based post-graduate courses.

2.45 Oxford Brookes figures take account of the exclusions of students on the demand side, in calculating the students with accommodation requirements, however, we understand that the figure for accommodation places are not adjusted in the same was as those for Oxford University. This will include some bedspaces which are occupied by students in the excluded categories. The result of the two approaches means that Oxford University are underestimating the number of bedspaces provided which should be taken into account when calculating the amount of student accommodation provision.

2.46 After discissions with the University, it was agreed that these bedspaces should not be discounted and should be included as they exist and have been provided for as student accommodation. It would not be practical to monitor which type of student occupies each of these spaces and whether they met the criteria of students who are excluded from the accommodation need calculation – particularly as this could be inter-changeable on a frequent basis.

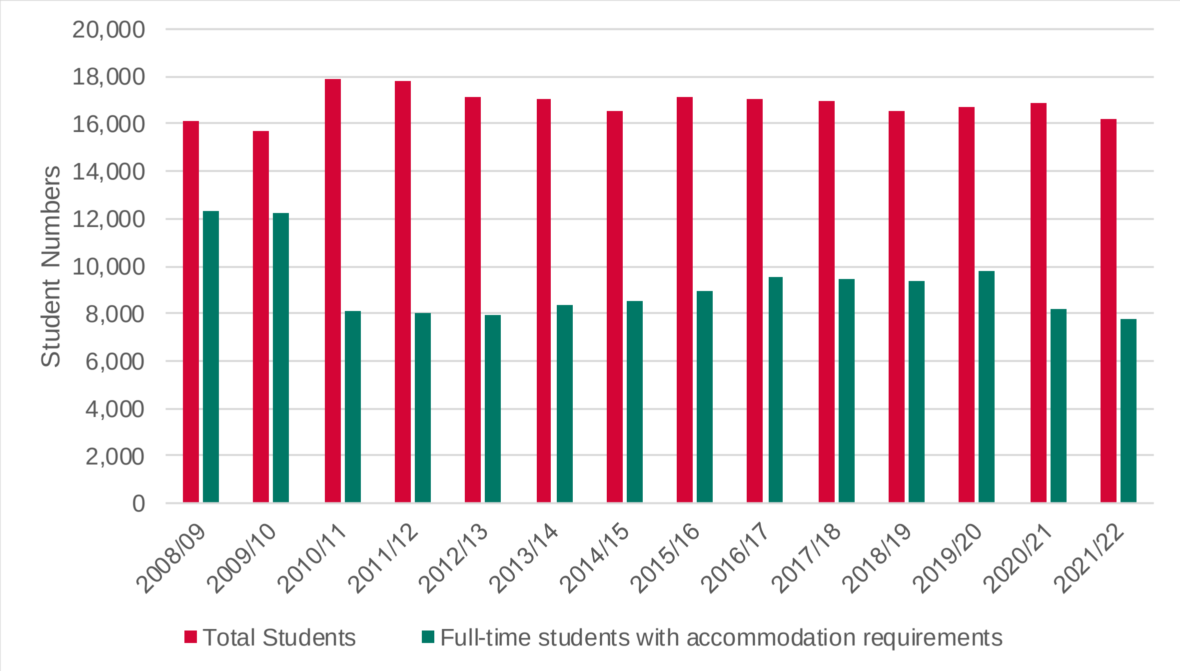
Oxford Brookes

2.47 For Oxford Brookes University, the 2021/22 data shows that there were 16,199 students attending the University. Over the recorded AMR period, the number of students ranges from around 16,000 students to a peak of 17,876 students in 2010/11. **Total student numbers overall have been essentially flat over the period since 2008:** they peaked in 2010/11 and have seen a modest general downward trend since.

2.48 Of the total student numbers since 2010/11, an average 51% of students meet the full-time definition and require accommodation.

2.49 The decrease in students with accommodation requirements seen from 2019/20 to 2020/21 at Brookes is slightly less than at the University of Oxford at 1,595 compared to over 3,000. Given the introduction of a number of new exclusion types in 2020/21 this decrease can be expected and again reflects a definitional change in need rather than an actual change.

Figure 2.9 Oxford Brookes University Total Students Vs Full-Time Students Profile



Source: Iceni Analysis of Oxford City Council AMR Data, 2023

University of Oxford

2.50 For the University of Oxford, the total student number recorded for 2021/22 was 26,439 students, which is the highest recorded total student number since 2008/09. When deducting students which are part-time and do not require accommodation the University state that 14,873 students require accommodation for that academic year.

2.51 The proportion of total students to full-time students requiring accommodation in 2021/22 is in line with the previous academic year (2020/21) with an average of 56% of the total student population requiring accommodation. However, in the pre-pandemic academic years (2019/20 onwards), the proportion of full-time students requiring accommodation is much greater at around 77% of the total student number.

2.52 It is difficult to compare the changes in student exclusion data from 2019/20 to 2020/21 due to the changes in the exclusions made. However, there is a notable number of students 'studying research-based post-graduate degrees' at 6,551 students in the post-pandemic years whereas the previous AMR's, post-graduate research students (which also have been assumed to be writing and are past year 4) has averaged at around 400 students per academic year.

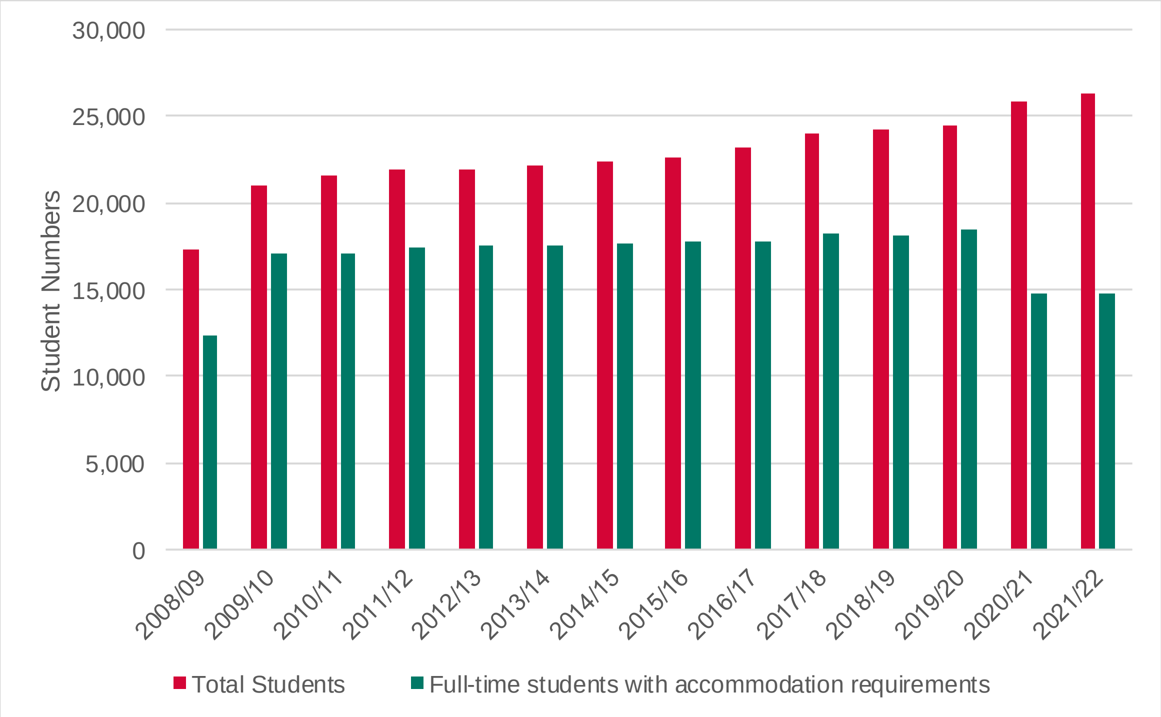
2.53 Through engagement with the University we have not been able reach a definitive answer as to this data discrepancy, however the University believe that it is a result of the change in exclusion definitions and the way data is reported. HESA data would certainly indicate that the University has seen in excess of 4,000 post graduate research students each year since 2015/16 and not the approx. 400 students levels reported in the pre-pandemic AMRs.

2.54 Within the 2021/22 AMR return, the University provided commentary on the reduction of students requiring accommodation citing continued social distancing requirements and the sustained fallout from unprecedented over-recruitment of students in the previous year. This over-recruitment is put down to the impact of Covid-19 and the government's change in A-Level grading, as well as graduate market uncertainty.

2.55 The engagement with the University of Oxford has also shown that they have been discounting the rooms they provide that are occupied by PG research students as part of their AMR return, as they are excluded from the need calculation. This infers that the provision of student accommodation by the University is likely to be notably higher than what has been provided in the AMR return.

2.56 Overall this indicates that the lower full-time student accommodation requirement shown in 2020/21 and 2021/22 is likely a result of changing definitions rather than an actual decrease in the accommodation need.

Figure 2.10 University of Oxford Total Students Vs Full-Time Students Profile



Source: Iceni Analysis of Oxford City Council AMR Data, 2023

Interrogating the Definitional Changes

2.57 It is useful to understand what the underlying trend in students requiring accommodation may be. The trend of relative stability in full-time student numbers at both universities pre Covid, with an increase (which may well be temporary) in 2020/21 and 2021/22, does not align with a reduction in students with accommodational requirements – which thus appears to reflect changes to how the latter is measured rather than an underlying trend.

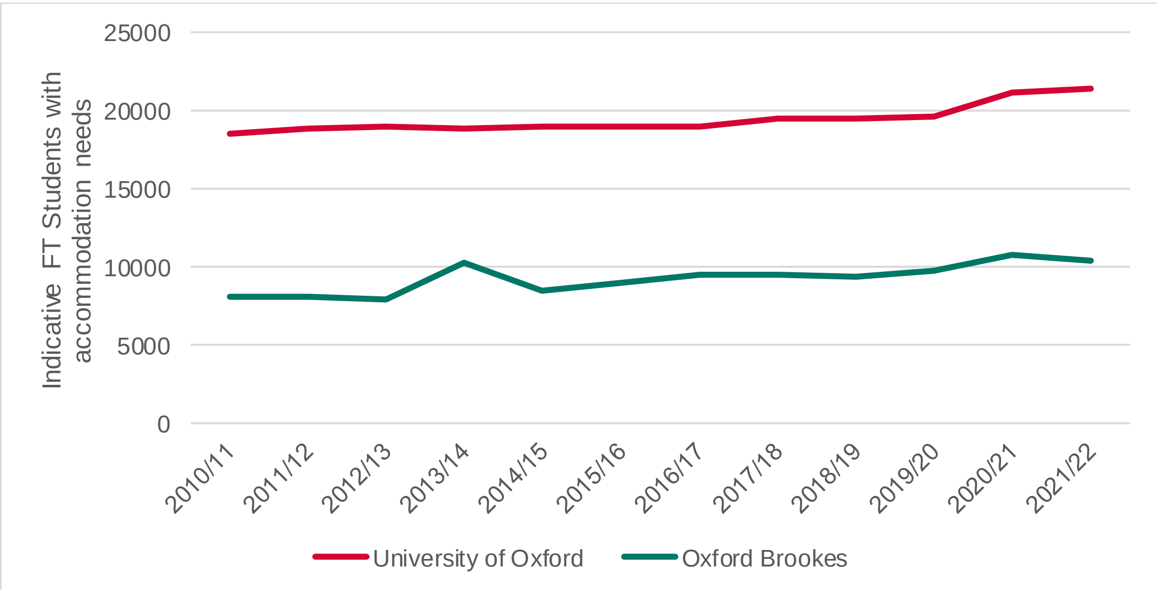
2.58 To interrogate this further, Iceni has sought to take the raw AMR data as a starting point. We have then applied a more limited set of reductions, which are as follows:

- Oxford University – remove part time students and those on short-courses, those with a term-time address outside the city, those living within the City prior to their course, and those on vocational courses. Other categories do not appear to have consistent trend data over time.

- Oxford Brookes University – removing part-time students, those at franchise institutions, those studying outside of oxford, those with a term-time address outside of the City, and placement students. Other categories do not include consistent trend data over time.

2.59 The results of this analysis are shown below. Our analysis points to relatively modest growth in student numbers with accommodation needs pre Covid at 0.7% per annum CAGR at University of Oxford and 2.1% pa CAGR at Brookes. These rise to growth rates of 1.3% and 2.3% pa respectively if the period considered is extended to 2022. This will however include what we would expect to be a Covid spike.

Figure 2.11: Indicative Consistent Assessment of Students with Potential Accommodation Needs



	Change 2010/11 - 2021/22	Change 2010/11 - 2019/20
University of Oxford	15.6%	6.3%
Oxford Brookes	28.4%	20.4%

Source: Iceni analysis of AMR data

Language Schools

2.60 Based on the 11 Language Schools assessed, during their peak week of student enrolment there were an estimated 1,984 students studying languages in Oxford. Typically, this peak lands in the summer months - with July being stated as the most popular for courses. Throughout the year it is anticipated that this population varies with winter months being quieter for language school students.

2.61 There is a large variety in the size of the language schools: ranging from EF providing up to 987 places (during a peak week) to small classes of 7 places provided at Alliance Francoise School. Overall, there are 5 schools which provide over a 100 student places, 2 schools that provide between 50 and 99 places and 3 schools which provide below 50 student places.

2.62 The age range of students varies but typically, courses start from the age of 16 with most students being in their mid to early 20s; but some courses are offered to children. Again, there is variety in the length, with courses offered over a weekend to those which last up to 10 months.

2.63 However, several courses are offered over a 2 to 4 week period. This would suggest that students only requiring accommodation on a temporary basis and not a fixed permanent basis.

Table 2.9 Language School Student Profile

Language School	Peak Month	Total Number of Students during a Peak Month Week	Typical Age Range	Typical Length of Stay
Kaplan International Languages *	March	187	16 to 25	1 week to 10 months
Alliance Francoise d 'Oxford	n/a	7	4 to adult	1 hour per week to over a weekend
The Oxford English Centre *	July	80	18 to 30	3 to 4 weeks

Language School	Peak Month	Total Number of Students during a Peak Month Week	Typical Age Range	Typical Length of Stay
Regent Oxford	n/a	40	16 +	2 weeks
College of International Education	August	158	20	2 to 4 weeks
Oxford School of English *	July	275	12 to 23	2 to 4 weeks
Oxford College of English	July	n/a	18 to 25	1 to 4 weeks
Oxford International English School *	July	166	Mid 20s	2 weeks
Oxford International Study Centre (OISE) *	July	63	15 to 55	2 weeks
Oxford International Language School (Oxford ILS)	July	21	16 to 25	3 weeks to 6 months
EF	July	987	16 to 64	8 weeks

Source: Iceni Analysis of Survey Data and British Council Inspection Reports[6]

2.64 The implications of the analysis are that the language schools will not generate demand for additional student accommodation to the same degree as the universities. Those on short-term courses are unlikely to generate demand for purpose-built student accommodation (given for instance minimum rental periods) or for Houses in Multiple Occupation (HMOs). The evidence instead points to peak demand in the Summer months outside of term-time of the HE institutions and a time of year when there is therefore likely to be surplus accommodation capacity. The scale of students involved is also modest relative to those studying at the two universities.

Further Education Colleges

2.65 There are five further education colleges in Oxford who are estimated to cater for around 932 students in the City.

2.66 Most of these courses follow the school term schedule with breaks over Christmas, Easter and Summer. The age these institutions are aimed is more concentrated at secondary school age to early 20s.

2.67 The size of these institutions can be split into two groups, larger institutions providing over 150 places which includes Active Learning, St Clare's International College and Kings Education Oxford; and institutions which provide under 50 places of Carfax College and EMBS.

[6] * Denotes data received from British Council Inspection reports

Table 2.10 Further Education College Student Profile

Further Education College	Peak Month	Total Number of Students during a Peak Month Week	Typical Age Range	Typical Length of Stay
St Clare's International College	July	458	10 to 17+	2 to 19 weeks
Kings Education Oxford	School Term	237	15 to 25	School Term Time
Active Learning City of Oxford	October	170	21 to 61	3 terms (12, 10 and 10 weeks)
EMBS Community College	School Term	43	16 to 18	School Term Time
Carfax College – Independent College	School Term	24	11 to 21	School Term Time

Source: Survey data

2.68 Many Further Education colleges in Oxford serve the existing residential population, students more often than not live in existing residential households either as part of a family unit or independently. The attendance of the students at these Colleges does not require them to seek new accommodation and as such does not create additional housing need.

Summary of the Profile of Students

Census Data

2.69 The total number of full-time students in the City increased by 10% between 2011 and 2021 up to 32,888. Of full-time students, 54% live in university linked communal establishments and 24% in student only households which are likely primarily HMOs.

2.70 A large majority of students aged 18 to 20 live in university linked student accommodation at 69%, followed by those living in all student households at 16.9%. This gap between the two decreases as students age.

HESA data

University of Oxford

2.71 In the 2021/22 Academic year HESA reports 27,290 students at the University of Oxford.

2.72 Numbers have grown year on year since 2016/17, with a particularly large increase between 2019/20 and 2020/21, this increase is likely a factor of increased first year student recruitment impacted by the change in A-Level marking

2.73 34.2% of students are under 20 with this proportion decreasing as students age up until the over 30 group which sees a relatively high proportion of 23.9%. Undergraduates are the largest group at the university at 45% but it has also seen a fall in part-time undergraduate students again replaced by increases in taught post-graduate students.

2.74 The University saw a large increase in part-time distance learning in 2020/21 and a slight increase in full-time, this has since decreased.

2.75 There has been a huge uptick in the recruitment of non-EU international students (+38.4%) at the University, EU students have remained largely stable with a particular decrease in UK students (-3.4%).

Oxford Brookes

2.76 In the 2021/22 Academic year HESA reports 17,470 students at Oxford Brookes

2.77 Student instances at Oxford Brookes have increased modestly by 335 students peaking in 2015/16 at 17,865 students and remaining stable since

2.78 43.5% of students at Brookes are under 20 with the proportion decreasing as students age. As such a undergraduates studying full-time. There has been a decrease in part-time undergraduates over time, replaced by increases in post-grad students particularly those on taught courses.

2.79 Brookes has seen a slight increase in students who are distance learning but these students are usually part-time

2.80 There has been an uptick in the recruitment of non-EU international students (+5.4%) at Brookes with decreases in UK and particularly EU (-7.5%) students.

Non-University Institutions

2.81 In terms of the 16 non-university institutions, during their 'peak week' student numbers are estimated to reach around 2,000 language school students and 930 FE College Students. The range of sizes of these schools varies from around 1,000 students at one institution to small class sizes of 7 students. Typically, students attending these institutions are here for temporary, short term basis and the population of students changes throughout the year. Often the Language and FE schools cater for older students or international students.

2.82 Of the objective of this report, the number of full-time students with accommodation requirements is key to understanding and forecasting the potential student accommodation need for Oxford.

Table 2.11 Full-Time Students who Require Accommodation

	2021/22 Full-Time Students with Accommodation Requirement	5-year average (2017/18 to 2021/22) Full-Time Students with Accommodation Requirement
University of Oxford	14,873	16,869
Oxford Brookes	7,794	8,914

3. EXISTING STUDENT ACCOMMODATION PROFILE

3.1 This section summarises the student accommodation offers in Oxford for the two universities (based on HESA returns), the total position for the two universities together, the data for the non-university education institutions (based on the survey conducted) and overall totals for the student population of Oxford.

3.2 Table 3.1 sets out the accommodation profile of the FT students at the point of the 2021 Census in Oxford. Currently, University Communal living which includes Halls of Residents was the most popular option with 'all student households' taking up a quarter of the accommodation profile.

Table 3.1 Profile of Full Time Students Aged 18 and Over by Accommodation Type (%)

	Number	Percentage
Living with Parents	2,220	7%
Living in a Communal Establishment	18,274	56%
Communal: University	17,905	54%
Communal: Other Communal	369	1%
Living in an all Student Household	7,972	24%
Living Alone	884	3%
Living in Other Household Type	3,538	11%
Total	32,888	

Source: Census 2021

The University of Oxford Accommodation Provision

3.3 At the University of Oxford, accommodation is provided by the College which the student applies to. Accommodation is offered to all undergraduate students during their first year of study and for at least one other year of their course. Many colleges are also able to provide accommodation to graduate students (i.e. those on postgraduate courses).

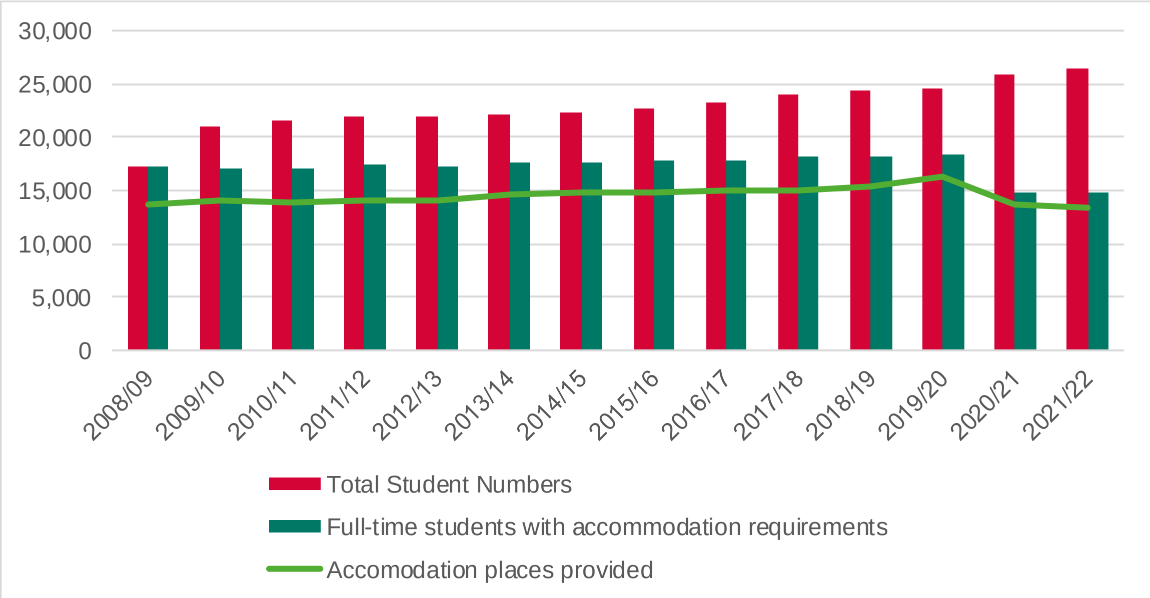
3.4 The Survey response from the University of Oxford showed that as of their 2021 Accommodation Survey, there were a total of 16,453 bedspaces owned or managed between the University and the colleges, which were provided across 15,643 rooms. By implication, some rooms accommodate multiple students, but the number of such rooms is relatively small. These bedspaces are for the occupation of undergraduates, postgraduates taught and postgraduate research students.

3.5 This number of bedspaces differs from the data recorded in the Council's AMR report which shows there were 13,382 accommodation places provided across the colleges in the 2021/22 academic year to eligible students classified using the agreed approach as needing accommodation. The

University attribute the fall in total accommodation places from the previous monitoring period (13,715 to 13,382) to continued social distancing requirements impacting the ability of some rooms to be shared.

3.6 Further consultation with the University has indicated that in their AMR returns, they have been discounting rooms they provide that are occupied by PG research students. This will also impact the accommodation places shown in the AMR, underrepresenting the actual number of bedspaces by approx. 2,200.

Figure 3.1 Accommodation places provided and number of students at University of Oxford



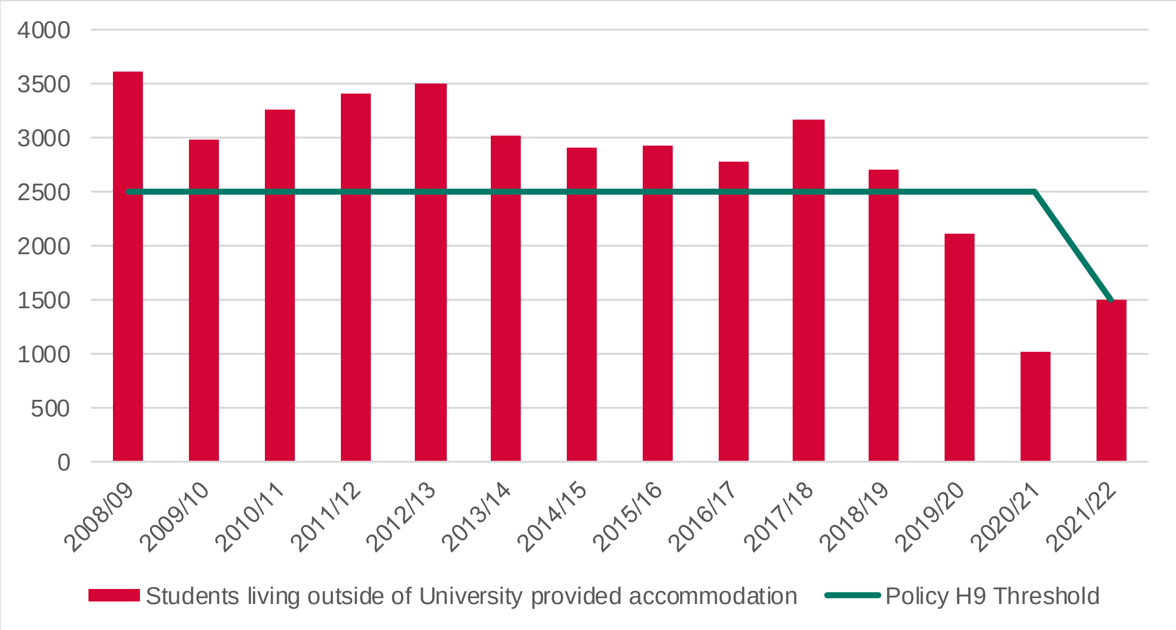
Source: Iceni analysis of Oxford City Council AMR data, 2023

3.7 The AMR confirms that there were 14,873 full-time students at the University of Oxford who have accommodation requirements. As of December 2021, there were 13,382 accommodation places provided across the collegiate University to this group. This leaves a total of 1,491 students living outside of University-provided accommodation in Oxford which is within the threshold for the Oxford Local Plan 2036, Policy H9.

3.8 Figure 3.2 displays how the level of students living outside of the university-provided accommodation has changed over time against the Local Plan threshold in place. Policy H9 initially set the threshold at 2,500 students but reduced this to 1,500 on the 1st of April 2022. The 2021/22 academic year is therefore the first year in which the lower threshold applies.

3.9 What is clear from Figure 3.2 is that over time the number of students living outside of University-provided accommodation (taking account of the exclusions applied) has fallen. The average number over the previous 5 academic years (2017/18-2021/22) is 2,300 which is less than the average for the prior 5 year period (2012/13-2016/17) of 2,500.

Figure 3.2 Number of University of Oxford Students Living Outside of University provided accommodation and the Local Plan Threshold



Source: Iceni analysis of the Oxford AMR data, 2023

3.10 Despite this fall in the number of students living outside of university provided accommodation, the number of accommodation places provided by the University has not significantly increased. Given that the overall number of FT students at the University has increased, it is surprising to see that this has not resulted in growth of accommodation need. Drawing on analysis from section 2 on the profile of students in the City and how this has changed, it can be assumed that the Universities recruitment patterns have changed; there is a distance learning effect and/or the definitional changes (in particular in terms of how research-based PG students are excluded) have affected the figures.

3.11 The increase in part-time students shown in the AMR data, who are excluded from the accommodation need calculation, suggests that the threshold set in the current Local Plan may have encouraged the University to recruit students who are not considered to have accommodation need.

3.12 Based on the University of Oxford's '*2023 Likely Cost of Living',* estimates that per month accommodation in the University's Colleges is likely to cost within the range of £680 to £860 per month. It states that Private Sector costs may vary from this. Given that Private Sector rentals often cover 12 month leases where University places often only cover term time at 9-10 months, college rooms are likely to be more affordable.

3.13 The majority of University of Oxford student accommodation is owned by the University and its colleges. The University has no arrangements with third-party student accommodation providers to provide student accommodation in the City, but does have formal nomination agreements with some landlords. The Survey reported 197 undergraduate and 193 graduate bedspaces that were not owned by the colleges based on its latest audit of accommodation. This is a small amount and equates to only 2.9% of all bedspaces offered.

Completion Data for University of Oxford

3.14 The University is in the process of upgrading its accommodation provision. Council monitoring data indicates that a total of 25 student accommodation schemes have been completed by University Colleges since 2016 with a total of 658 new bedspaces delivered. The largest five of these schemes, and their respective colleges, are shown in the Table below.

Table 3.2 Five Largest College Accommodation Schemes delivered since 2016

Application Number	Site Name/ Address	College association	Net Completed	Year Completed
16/02687/FUL	265 - 279 Iffley Road And Garages, Percy Street	Wadham College	117	2019
16/03056/FUL	Balliol College, Sports Ground Jowett Walk	Balliol College	102	2021
13/01637/FUL	Mansfield College	Mansfield College	78	2017
17/00758/FUL	St Catherine's, College Manor Road	St Catherine's College	78	2020
18/00258/FUL	Northgate House 13 - 20 Cornmarket Street	Jesus College	72	2022

Source: Oxford City Council Monitoring Data

3.15 Consultation with the University has indicated that part of the new student accommodation delivery arises due to the need for replacement of older stock of poorer quality, as well as delivering new rooms that meet modern student requirements (with en-suite facilities etc). Delivery of new stock will work to meet the growing student body as well as allow the University to identify further rooms that may be suitable for redevelopment at some point in the future.

University of Oxford Existing Accommodation – Summary

3.16 The existing accommodation offer at the university can be summarised as below:

- There are a total of 16,453 bedspaces owned or managed by the University and its colleges.
- These bedspaces are let to both undergraduate and postgraduate students, with 2,190 bedspaces let to postgraduate research students in the 2021/22 year.

- The University discount bedspaces provided to students not considered to have need within their AMR returns. This results in a lower figure shown for bedspaces provided of 13,382 in the 2021/22 year. However, as referenced earlier in this assessment, the University have agreed that these bedspaces should not be discounted from the calculation.

Oxford Brookes University Accommodation Profile

3.17 Based on the Survey response, Oxford Brookes University have confirmed that as of Autumn 2022 they own 3,068-bed spaces and manage a further 373 bedspaces. Another 1,186 private bedspaces are also provided for OBU students through nomination rights held by the University. OBU provides student accommodation for a notably lower proportion of its students than Oxford University does.

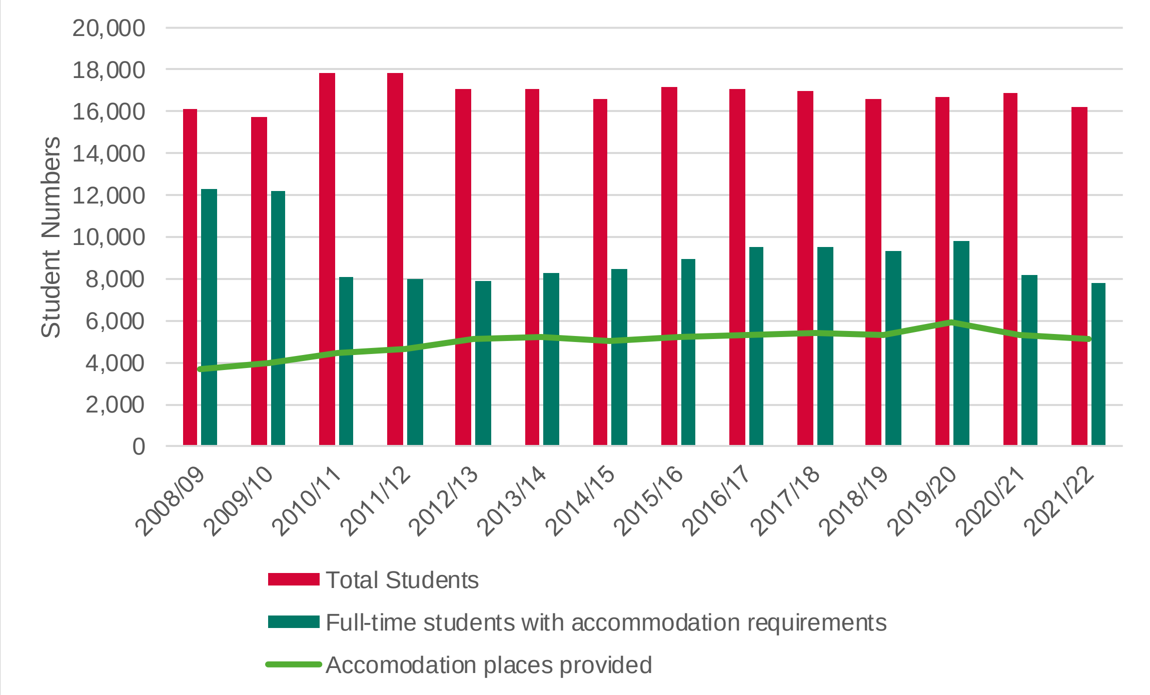
3.18 As with the University of Oxford, the classifications of students excluded from the accommodation need changed from 2019/20 to 2020/21. This saw the introduction of 5 new excluded groups including those on Further Education course, research based Post-graduates, students living in the city prior to entry onto the course and those in Private Student only accommodation. The Vocational course group is the most significant of this as it leads to circa 1,700 students who were previously seen as having accommodation need as now not.

3.19 The AMR data provides a breakdown of how the University-provided bedspaces and how these have changed over time. As of December 2021, there were 5,161 accommodation places provided by Oxford Brookes University, including those within Private Sector student accommodation that the University has nomination rights for. This is a fall of 753 accommodation places from the peak 5,914 accommodation places provided in 2019/20.

3.20 This fall is attributed to the loss of university owned accommodation at the Wheatley Campus and Clive Booth Student Village and also the ending of some nomination agreements with private providers at Dorset House and Slade Park amongst others. It should be noted that while the loss of university owned accommodation usually means the room is also lost, often in preparation for redevelopment, in the case of Clive Booth, the ending of nominations agreements does not always constitute a loss of accommodation. In this case, the rooms at Dorset House, Beech House, Slade Park and The Park still exist and are still occupied by students. Oxford Brookes believe that these rooms remain occupied by Brookes students.

3.21 The introduction of new exclusion classifications in 2020/21 saw students living in private student only accommodation removed from the needs calculation. In 2020/21 the University reported 209 students to be within the Private sector, this increased the next year to 317 in 2021/22. Given that the accommodation provided at Dorset House and Beech House alone is equivalent to 480 bedspaces it is likely that the numbers in private PBSA reported by the University in these years have been underrepresented.

Figure 3.3 Accommodation Places Provided and Number of Students

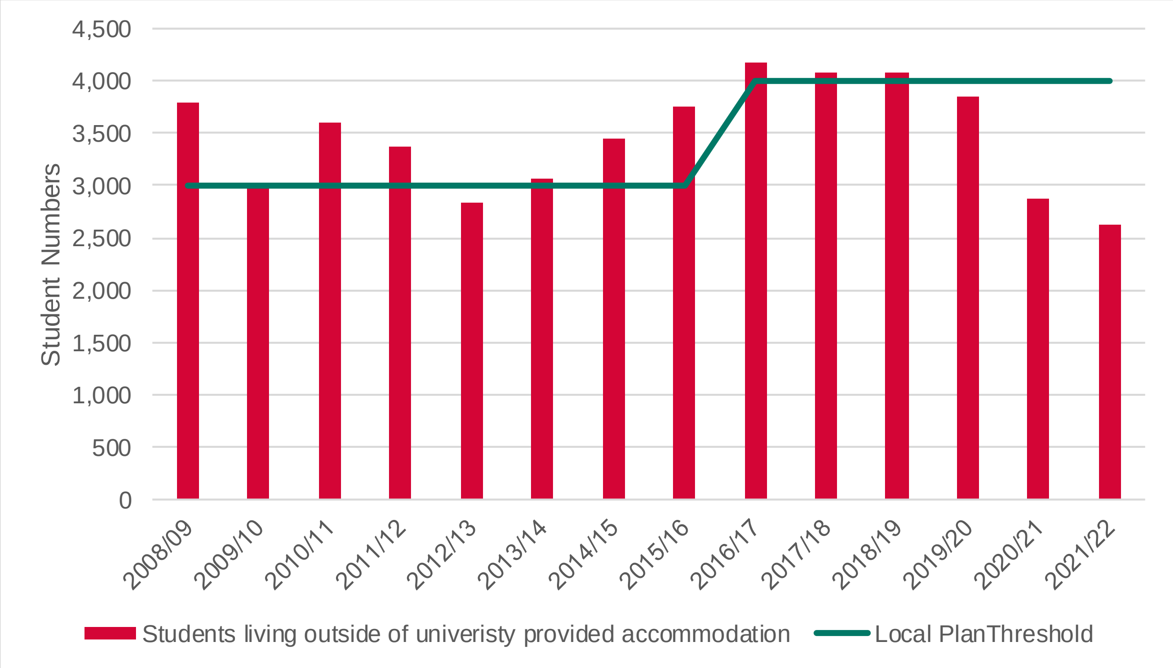


Source: Iceni analysis of the Oxford AMR data, 2023

3.22 As the number of full-time students exceeds the accommodation places provided, a proportion of students at Oxford Brookes live outside of university-provided accommodation. For the 2021/22 academic year, there were 2,633 students living outside of university provided accommodation which is below the 4,000-student threshold set in Policy H9 of the Local Plan. Figure 3.4 shows that except for the last three years, and 2012/13, the Local Plan threshold for the number of students who live outside of Oxford Brookes provided accommodation has been exceeded.

3.23 The AMR for 2020/21 shows that the global pandemic some impact on student accommodation over the preceding year. Occupancy rates at university-provided accommodation were much lower than normal. A significant number of students were studying at home as they were either unable to travel, self-isolating or shielding, in accordance with Government and University guidance. In addition to this, changes in the calculation of students with accommodation need has also impacted the final need figures. The 5 new classes introduced has led to the exclusion of an additional 2,500 plus students each year.

Figure 3.4 Number of Students Living Outside of University provided accommodation and the Local Plan Threshold



Source: Iceni analysis of the Oxford AMR data, 2023

3.24 The Local Plan allows for some leeway if the development at Clive Booth Student Village is delayed. Policy H9 states that the threshold would be increased to 4,500 if "*on 01 April 2023 a scheme delivering a net increase of at least 500 student bedrooms has not been developed at Clive Booth Student Village (Site SP17); and/or Oxford Brookes is able to demonstrate that they are unable to secure additional nomination rights to meet the threshold.*" Given that the Clive Booth redevelopment appears to be on-track with construction having already commenced this leeway may not be required.

Oxford Brookes University Existing Accommodation Profile Summary

3.25 The existing accommodation provision at Oxford Brookes can be summarised as below:

- The university own 3,068 bedspaces and manage an additional 373 (totalling 3,441 bedspaces). Nominations agreements are also in place for 1,186 bedspaces within the private sector PBSA.
- AMR returns for the 2021/22 year indicate that the university is providing 5,191 bedspaces to students, this number includes any students who sit within excluded groups and are not considered to have accommodation needs.
- The University has also reported on the number of students living within private PBSA for the past two years. The numbers reported for these years appear low, particularly given that a number of private PBSA schemes in the city previously had nominations rights with the university

and lie in proximity to the main campus. Therefore it is expected that this number has been underrepresented.

Non-University Accommodation Profile

Language Schools

3.26 Based on a combination of survey data and Inspection Reports, an accommodation profile can be built around each institution. When a British Council Report has been used (in the absence of a Survey response from the institution) the accommodation profile mirrors the breakdown of students at the time of inspection, therefore, there could be more bed spaces available than suggested in the table below.

3.27 All language schools, except for Alliance Francoise d 'Oxford (whose students typically live locally), provide homestay accommodation. Of the language schools that publish data and responded to the survey there are at least 467 homestay spaces in the City and there are an additional 3 schools who do provide homestay accommodation but the exact quantum is unknown. Most Language Schools will arrange the homestay accommodation, with the school making sure they are located within an accessible distance from the school - which typically is either within walking distance or accessible by bus.

3.28 Residential accommodation is the second most common accommodation type for language schools. However, around 84% of the residential accommodation is provided by the 299 rooms EF provides, which provides year-round on-site accommodation for students. In this case 'Residential' refers to accommodation directly provided by the centre either on site or within a short term summer rental agreement with an existing student hall. In most centres it refers to typical boarding style accommodation, but this can vary depending on what the centre is able to offer to students.

3.29 It is estimated that 13% of students attending a language school organise their own accommodation, by either staying with their own family or staying in privately rented rooms.

Table 3.3 Language School Accommodation Profile Breakdown

Language School	Homestay	Private Homes	Residential	Hotel/ Guesthouse	Independent Self-Catering e.g. Flat or Student House	Staying With Own Family	Staying in Privately Rented Rooms/Flats
Kaplan International Languages	49	4	18	1	31	0	2
Alliance Francoise d 'Oxford	0	0	0	0	0	7	0
The Oxford English Centre	3	0	0	0	0	1	3
Regent Oxford	Yes[7]	0	0	0	0	0	0
College of International Education	126	0	1	0	0	31	0
Oxford School of English	95	0	17	13	0	12	18
Oxford College of English	Yes	0	Yes	0	0	0	0
Oxford International English School	17	0	6	0	0	1	3
Oxford International Study Centre (OISE)	13	0	14	0	0	0	5
Oxford International Language School (Oxford ILS)	Yes	0	0	0	0	0	11
EF	164	0	299	0	0	0	18
Total	**457**	**4**	**355**	**14**	**31**	**52**	**60**

Source: British Council reports and Iceni Survey

Further Education Accommodation Offer

3.30 The table below presents the accommodation offered from the Further Education Colleges in Oxford. Residential/boarding style accommodation directly provided by the centres provide around 89% of bedspace. The provision of this accommodation is split in a 1:3 ratio between St Clare's and Kings Education. Both institutions own and manage their own residential accommodation which is provided all year round for students.

[7] Yes indicates that the Language School provides this type of accommodation but the exact quantity has not been shared.

3.31 Homestay accommodation is also provided by further education colleges with an estimated 54 bedspaces provided, which includes the total accommodation provided at Carfax college which is all provided by host families.

Table 3.4 Further Education Accommodation Profile

Further Education	Homestay	Private Homes	Residential	Hotel/ Guesthouse	Independent Self-Catering e.eg. Flat or Student House	Staying With Own Family	Staying in Privately Rented Rooms/Flats
St Clare's International College	11	0	371	0	0	3	7
Carfax College – Independent College	3	0	0	0	0	0	0
EMBS Community College	0	0	0	0	0	0	0
Kings Education Oxford	40	0	130	0	0	0	0
Total	**54**	**0**	**501**	**0**	**0**	**3**	**7**

Source: British Council reports and Iceni Survey

3.32 Overall, the number of students in Language and FE institutions in Oxford that live outside of the family home or specialist accommodation in the Private Rented sector or independently organised self-catering is very low equating to 98 rooms in total and only 6.4% of the rooms offered across the two types of institution. It is highly unlikely that this quantum of need emanating from students at the schools and colleges will equate to a significant need for accommodation.

Externally Provided Accommodation

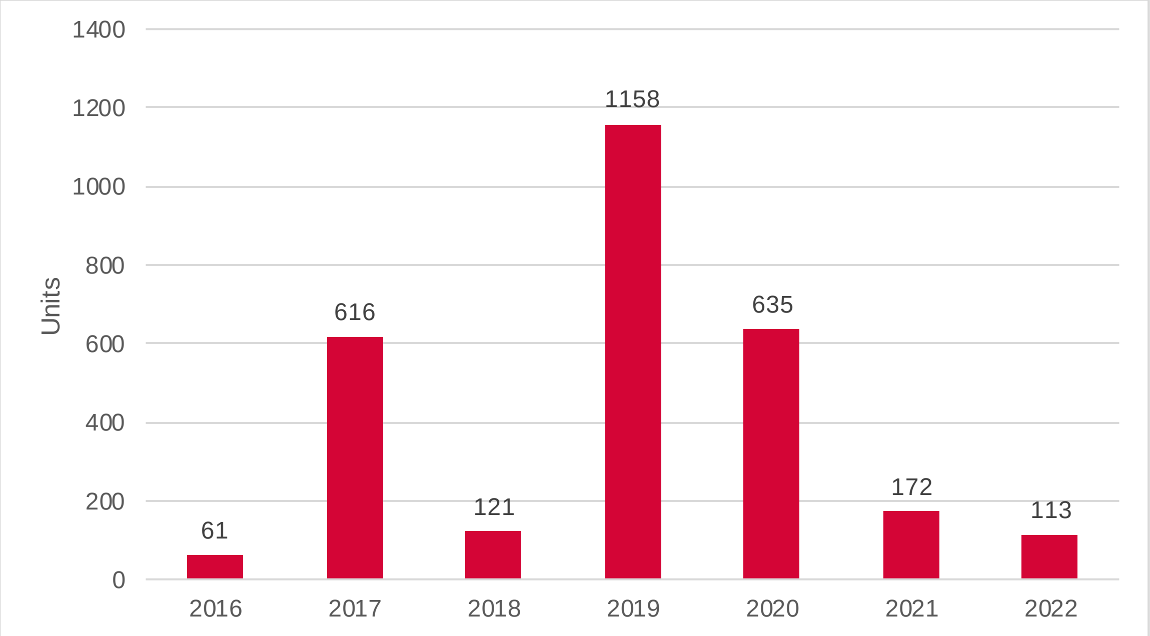
Purpose Built Student Accommodation

3.33 Purpose Built Student Accommodation (PBSA), which includes University/College nominated accommodation and private halls is another form of student accommodation in the City. Both of the Universities provide PBSA and there is a range of privately managed speculative PBSA within the City.

Council Data Analysis

3.34 Analysis of the Councils annual monitoring data indicates the net amount of completed student bedspaces in the City with the most completions in 2019 of 1,158 bedspaces. This provides a picture of all student completions, university associated and private/speculative.

Figure 3.5: Yearly net completed student units



3.35 The table below shows the five largest completed PBSA schemes from 2016 onwards: of these five schemes, all have been built speculatively. The largest scheme at the ex-British Telcom centre on James Wolfe Road although is now managed privately by Unite Students. All bedspaces are exclusively offered to Oxford Brookes students.

Table 3.5 Five largest completed PBSA schemes

Application Number	Site Name/ Address	Speculative or University associated?	Net Completed	Year Completed
17/02140/FUL	British Telecom, James Wolfe Road	Speculative (Unite Students)	887	2019
16/02945/FUL	Oxford Business Centre, Osney Lane	Speculative	514	2020
15/00858/FUL	36, 38 and 40 London Road & 2 Latimer Road	Speculative	167	2017
16/01752/FUL	Land At Swan Motor Centre And To The East Between Towns Road	Speculative	144	2019
14/02256/FUL	Site of 4 to 5 Queen Street	Speculative	133	2017

Source: Oxford City Council Monitoring Data

3.36 We have sought to analyse some information on these Private PBSA schemes in terms of price and contract type, this is set out below:

Site Name/ Address	Notes
British Telecom, James Wolfe Road	- Whilst constructed as a speculative development the scheme is now solely available to Oxford Brookes Students known as Parade Green and therefore is included within their existing student bedspaces figures. - Consultation with Oxford Brookes has indicated that the current nominations agreement expires in 2029. The university are not intending to renew this agreement upon its expiry. - All bedrooms are En-Suite single occupier and self-catered. - Contracts range from 38 (for first year students) to 42 weeks (for older years students). - Cost per week are fixed at £173.38 pw in the 2022/23 academic year, and increasing to £180.32 pw in 2023/24
Oxford Business Centre, Osney Lane	- Scheme is operated by Student Castle. - Single occupier rooms, Studio Flats, Twin Bed Studio Flats and 2 Bedroom Flats are available, all units have En-Suite bathrooms. - Contracts can range from 45 to 51 weeks depending on the unit. - Prices range from £237 to £445 pw for single occupancy and £314 to £465 for double occupancy rooms
36, 38 and 40 London Road & 2 Latimer Road	- Now known as Beech House the scheme is operated by Unite Students - All units have En-Suite bathrooms with whole flat sizes ranging from a minimum of 3 to a maximum of 11 occupants, Studio rooms are also available. Rooms are only offered on 44 week contracts. - Costs per week range from £219 to £222 for rooms in flats and £265 per week for Studios
Land At Swan Motor Centre And To The East Between Towns Road	- Now known as Between Towns Court the scheme is operated by Fresh. - All rooms have En-Suite bathrooms with Studio rooms also available. - Contract length ranges from 44 to 51 weeks with costs per week. From £210-227 for 44 week contracts and £199-£222 for 51 weeks. - Studio flats are £305 per week and are only available for 51 weeks.
Site of 4 to 5 Queen Street	- Now known as Carfax Quarter the scheme is operated by CRM Students. - All rooms have En-Suite bathrooms and are only available on 51 week contracts. - Flats with either 5 or 7 rooms are available with pricing reflecting this, rooms in 5 bed flats are £238 per week and in 7 beds £226 pw.

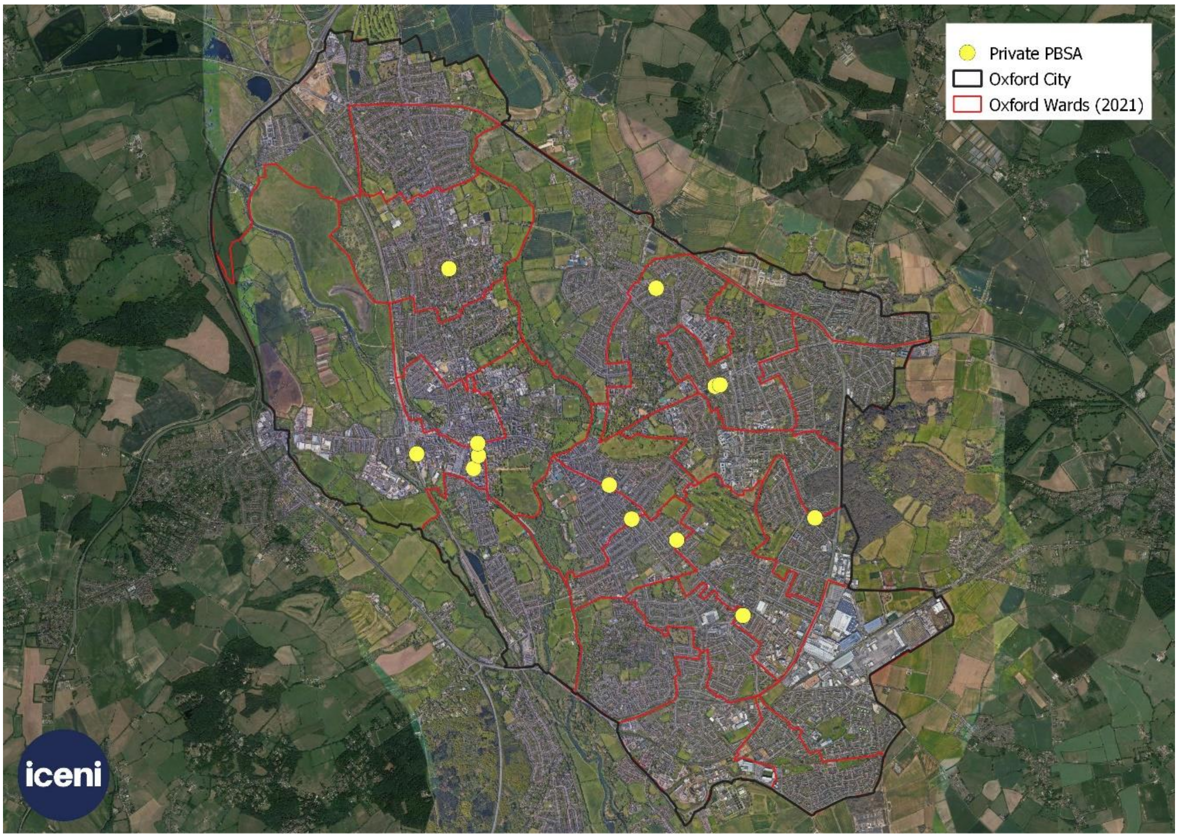
Source: Google

3.37 Iceni have made an assessment of the number of private PBSA schemes currently operating in the City, There are a total of 13 schemes which increases to 14 if including Parade Green, for which the nominations agreements is expected to expire in 2026. There are 2 additional schemes that lie outside to the west of the City boundary within the Vale of White Horse district. It is likely that these schemes serve students in Oxford, however given that they are outside the city itself they have not been counted.

3.38 The eastern half of the City appears to have a slightly higher number of private schemes than the western. The location of the universities is almost certainly a factor in this as many speculative developers will be wanting to ensure that the location of their development is within easy commutable distance to one or both of the universities. Oxford Brookes for example sees 8 of the 13 schemes within commuting distance, with the remaining 5 lying in the western section of the city in the city centre and the north. Given that Oxford Brookes provides less accommodation overall, it is unsurprising that speculative private developers seek out sites closer to their university.

3.39 Overall, relative to other towns and cities with a large university presence, privately provided PBSA in Oxford is relatively limited. This is likely to be due to the limited amount of land available within the city's administrative area and the need to balance housing need of all groups, including students. This may be further influenced by the council's policies limiting the number of students who live outside of university owned or managed accommodation as well as the scale of accommodation that the universities already provide.

Figure 3.6 Private PBSA schemes in Oxford



Source: Iceni analysis of Google data

Concentrations of Houses in Multiple Occupations

3.40 The Council maintains a record of licensed HMOs in the City, and this provides an up-to-date view of the number of HMO properties registered in 2022. The Council introduced additional licensing regulations for HMOs in 2021, this required all HMOs with 3 or 4 tenants to be licensed. Prior to this, only HMOs with more than 5 tenants required a licence as per the mandatory (England-wide) HMO scheme. Additionally, since 2012 an Article 4 direction has covered the city. The Article 4 direction restricts the conversion of dwellings into HMO use as normally allowed under general permitted development.

3.41 Further restrictions on HMOs are in place within Policy H6 of the Local Plan. This policy only allows for the conversion of a dwelling (Use Class C3) to a small HMO (Use Class C4), or a small HMO (C4) to a large HMO (Sui Generis) where the following conditions are satisfied:

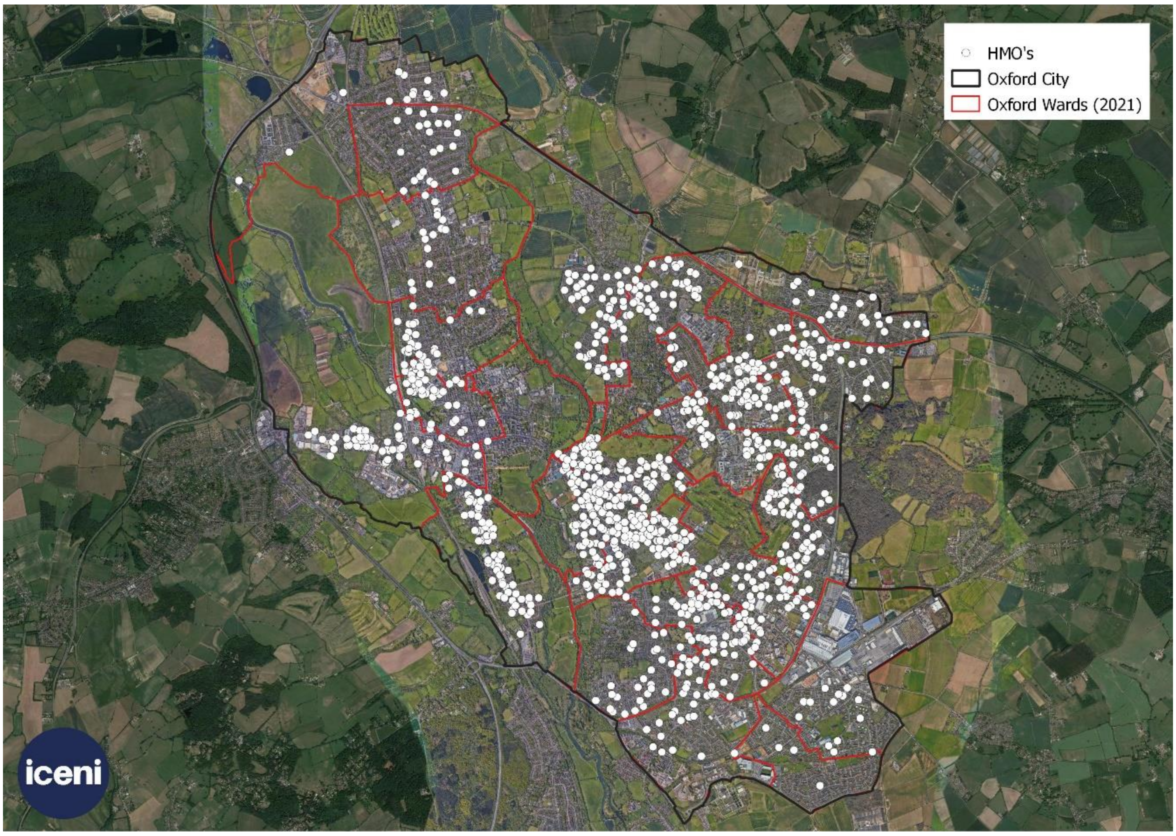
"a) the proportion of buildings used in full or part as an HMO within 100 metres of street length either side of the application site does not exceed 20%; and

b) the development complies with the space standards set out in Policy H15; and

c) the development complies with the City Council's good practice guidance on HMO amenities and facilities, or any equivalent replacement document."

3.42 Figure 3.7 shows the location of the licenced HMO properties within the City. Generally, they are spread across the City's residential areas with every ward having at least one HMO property. There is a strong cluster of HMOs around Iffley and the number of HMOs reduces as you move out of the city centre. Some dense clusters appear around Cowley Road, Botley Road, Jericho and Headington, with some slightly less defined clusters in Cowley and New Marston.

Figure 3.7 HMO Licences Mapped by Oxford Wards



Source: Iceni analysis of Oxford City Council data

3.43 The table below provides the numerical breakdown by wards with 5 highest and 5 lowest HMO licences (a full list of HMO licences per ward is provided in Appendix 2) and the percentage of all HMO licences in the city. St Mary's sees the highest number of licences at 580 which equates to 14.9% of all HMO licences in the city. The top five wards with the most HMO licences, are all located across a central belt of the City to the south of the city centre. This location generally lies between both university campuses with easy commutable distance to both.

Table 3.6 Wards with the highest and lowest HMO Licences

Highest HMO Licences per Ward		Lowest HMO Licences per Ward	
Ward	Number of HMOs (% of total HMOs)	Ward	Number of HMOs (% of total HMOs)
St Mary's	580 (14.9%)	Holywell	2 (0.1%)
St Clements's	527 (13.5%)	Northfield Brook	4 (0.1%)
Donnington	433 (11.1%)	Blackbird Leys	20 (0.5%)
Churchill	302 (7.7%)	Wolvercote	26 (0.7%)
Hinksey Park	215 (5.5%)	Barton & Sandhills	30 (0.8%)

Source: Iceni analysis of Oxford City Council Licensing Data

3.44 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 accommodations is maintained within a 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, cause issues of environmental upkeep and anti-social behaviour and impact quieter neighbourhoods during August, especially when landlords fail to care for their properties.
- 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; and
- Growth in student HMOs within an area can inhibit the availability and supply of homes for other groups within the population, such as families.

3.45 Taking the 2021 Census data on population for these five wards with the highest number of HMOs, Iceni note the following densities[8]:

- St Mary's, 80 HMO properties per 1,000 of the population
- St Clement's, 87.9 HMO properties per 1,000 of the population
- Donnington, 59.8 HMO properties per 1,000 of the population
- Churchill, 39.6 HMO properties per 1,000 of the population
- Hinksey Park, 38.5 HMO properties per 1,000 of the population

Students Living in the Wider Housing Market

3.46 Based on the most recent 2021/22 AMR data from the universities, it is estimated that the number of University of Oxford undergraduate and postgraduate students living in the community total about 1,491 students, the total number of Brookes students is estimated at 2,633. This is below the threshold set by the Council in Policy H9 of 1,500 for the University of Oxford and 4,000 for Oxford Brookes.

3.47 The numbers leave the University of Oxford very close to the threshold with Brookes having some leeway. However, this estimate excludes certain groups of students by agreement with the Council.

[8] A full list of HMO densities per ward is provided in Appendix 2

This figure also excludes similar estimates in respect of postgraduate research students, who are treated by the City for these purposes as staff.

3.48 Although the Universities and the Council have agreed to exclude these groups from the needs calculation, the students within them are still likely to require some form of accommodation within the City. Equally, given that neither university completely exclude these groups from actually occupying university provided bedspaces, this may result in students who are deemed as requiring accommodation being pushed towards the HMO sector. Furthermore, it is important that the student housing market deliver some level of choice and variety for students, HMOs are an important factor in this.

3.49 Although students are the most common group associated with HMOs, it should also be noted that HMOs are not always occupied by students only. Young professionals living in Oxford rely on HMOs as an affordable housing type. Difficulty in attaining living accommodatio n within HMOs could lead to decreasing graduate retention rates and a decreasing young professional workforce within the City. In a similar vein, some more inexpensive HMO spaces are an important housing option for lower income people who cannot afford to rent whole houses or flats. In this group, access to affordable HMO living accommodation could ensure that they do not fall into homelessness.

3.50 An increase in overall student numbers at the two universities could put additional pressure on the HMO sector within the City if it is not matched by provision of student bedspaces. This is important as other groups beyond students rely on the HMOs to access housing, particularly at the lower end of the market where there are few other housing options, so this makes the provision of additional PBSA bedspaces alongside student growth particularly important.

Letting Agent Consultation

3.51 Iceni have undertaken further consultation with student lettings agents within Oxford in order to understand the market for private rented student housing and HMOs in the City further.

3.52 The following agents have been consulted in December 2022:

- Connells – Headington
- Premier Estates – Cowley Rd
- Chancellors – Cowley Rd
- Scott Fraser – Headington
- College and County Lettings – St Clements' St

3.53 Cowley Road was overwhelmingly considered by agents to be most popular with students, mainly due to the area's proximity to the Universities as well as bars and nightlife. One agent referred to the Cowley- Iffley- St Clements area as the 'Golden Triangle' for student housing and stated that they were always in need of new properties suitable for students in this area.

3.54 In terms of stock, agents generally considered 3-6 bedroom properties but particularly 4 bedrooms to be most popular. Generally, students were not seen to be overly prescriptive on their needs for houses, but space for double beds is usually seen as particularly important. Location was also considered to be important with many students wanting to be within walking distance to their university/college. One agent considered modern properties with off road or permit parking are let especially quickly.

3.55 Generally, agents were looking for more stock overall in the popular areas, with one agent identifying a lack of 3 beds in particular as a result of many landlords converting dining/living rooms in 4 bed properties to gain a bedroom. Larger properties were also seen as required - with one agent detailing a number of larger groups looking for 6 or 7 plus bedroom properties.

3.56 Most agents consulted considered there to be a lack of property available; however, one bucked this trend and considered there to be an oversupply of HMOs in Oxford overall. This was seen as a change from a few years ago and primarily driven by the increase in PBSA in the City.

3.57 The impact of Covid on student rentals was considered minimal by all agents - largely due to many student contracts being signed 8-9 months in advance of the move in date. This meant that many students were already tied into contracts prior to the Covid outbreak. One agent reported an increased hesitancy to sign lettings contracts post Covid; with many students asking more questions and more involvement of guarantors in the process. These issues are however now likely to have subsided.

3.58 A majority of student renters were undergraduates, with much of the viewing of properties and contracted signing undertaken in November to January, before the beginning of the next academic year in September. Postgraduates were also seen, with one agent estimating 20% of their student tenants to be postgraduate, however the busier time of year for this group is usually March when postgraduate course offers are received.

3.59 In terms of the balance of International vs UK originating students, agents responses were somewhat mixed. Where some agents considered most student renters to be originating from the UK, some saw a more 50:50 split. Rental contracts that require international students to provide a UK based guarantor or some payment up front act as a barrier to many international students wishing to rent privately and therefore international students are more likely to use PBSA.

3.60 Overall the impact of the increase of PBSA on the private student rental market was also disputed by agents. Three agents had seen no impact yet and did not see any impact in the future; whereas one had similarly not seen any impact as yet but predicted some further down the line. Another agent had seen a large impact of PBSA on larger group sizes, with many groups looking for properties with 6 plus bedrooms choosing to enter into PBSA over private rented, leaving some of the larger HMO properties harder to find tenants for. The same agent also considered the recent delivery of PBSA rooms to have flooded the student rental market, with an increased number of private rented properties becoming vacant.

Homestay Style Accommodation

3.61 A further type of accommodation on offer is homestay accommodation. This type of accommodation provides an opportunity for an individual (or individuals) to stay with a local family, normally for a fee.

3.62 Neither university offers homestay style accommodation to students and many of the FE colleges and language schools organise homestay accommodation themselves as part of the package of study they offer to students. The organisation of this by the centres themselves is particularly important for students under 18 due to safeguarding issues.

3.63 Despite this, there are some students at the language and FE colleges that do not stay in accommodation provided by their respective institutions. This group of students commonly lived in Oxford prior to beginning their studies, in either family homes or their own, this therefore does not result in any additional accommodation need.

Conclusion

3.64 Many of the colleges and language schools provide accommodation for students. For language schools it is estimated that only 13% of students organise their own accommodation with many of that group staying with their own family and some staying in privately rented rooms. Further Education colleges also provide accommodation with most students living within homestay or other provided residential accommodation. Given the short term nature of the courses offered at these institutions, it is not expected that any additional housing need will evolve from this.

3.65 The Survey response from the University of Oxford listed a total of 16,453 bedspaces across 15,643 rooms, between the University and the colleges. Brookes have confirmed that they own 3,068 bed spaces and manage a further 373. Another 1,186 private bed spaces are also provided through nomination rights held by the University. Both universities have shown a decline in the number of accommodation places provided in the AMR data returns since 2019/20. In Brookes case, this has largely been due to the closure of the Wheatley campus and the ending of some nominations agreements. With the University putting this down to continued social distancing requirements and increases in post-graduate research students who are occupying rooms that have previously been discounted from the total (although recent discussions with the University mean these bedspaces are now included).

3.66 The university student accommodation situation in Oxford overall is very unique in that many students live in university run or managed accommodation and that this is typical even beyond the first year of study, where at many other universities students move into HMOs.

3.67 The Council's monitoring records show that city centre wards typically see the highest concentration of HMOs, with all five largest HMO clusters very close to the city centre and within reasonable commuting distance to each main University campus. HMOs not only serve students in the city but also young professionals and people on lower incomes and as such, their provision is important. However, given the issues that can arise from high concentrations of HMOs within an area, it is sensible to control their development.

3.68 Oxford City Council has a history of policy restrictions in place on the licensing and creation of new HMOs and this has restricted growth in the sector. Given also that the current PBSA provision in the City is somewhat limited compared to other university towns and cities, it is important that delivery of new PBSA schemes is supported where appropriate, to relieve the pressure created by students on the HMO market.

4. FUTURE EXPANSION PLANS

4.1 A key aim of this study is to consider plans for university expansion, and in particular the expansion of student numbers, which will help to inform future student accommodation policies for Oxford.

4.2 The data from this section has been sourced from conversations with the higher education institutions – Oxford University and Oxford Brookes University - as well as the survey responses.

Future Growth in Student Numbers

4.3 Analysis of answers from non-university institutions indicates that only a few institutions have plans to expand up to 2030, beyond this there is little information, likely a result of the longer time frame as many businesses will not plan this far ahead. Of those institutions that did plan to expand, many cited a rate of between 10 and 25 percent up to 2030. Given the small number of students at these institutions that may require accommodation currently it is not considered that the growth of these institutions will result in any significant impact on housing need. The assessment therefore focuses on the two universities.

Oxford Brookes University Strategy 2035

4.4 Oxford Brookes has published the Oxford Brookes University Strategy 2035[9] which sets out the focus and priorities for the institutions for the next 15 years (report published in 2020). There are four guiding principles of the plan which are; Education and Enterprise, Research and Innovation, People and Culture and Partnerships and Place.

4.5 As can be expected, not all of the guiding principles result in objectives and aims that are relevant to this study in terms of student numbers and demographic or changes to the University's building footprint or estate. Education and Enterprise for example does not directly relate to this, as such we have sought to identify only the relevant aims.

4.6 Under the Research and Innovation principle the University aims to *"strengthen our doctoral training centres and graduate college, and double the number of early career researchers".* In Appendix 6 of the strategy, the University sets a Target by 2025 to *"increase research power by 30%"; increase research student numbers by 25%; improvement in 3/4* Research Environment".*

4.7 Under Partnerships and Place the University recognises its impact on the community it seeks to help in *"informing policymakers, contributing to the cultural and social development of society"* and

[9] Oxford Brookes University (2020/21) University Strategy 2035

"making a positive contribution to civic society and the richness of life in the community as a whole". In terms of Place in particular, the University intends to "*invest in our place, ensuring that our buildings are sustainable and stimulating for all" and further develop IT infrastructure to allow for increased virtual learning".*

4.8 As a part of these goals, the Partnerships and Place 5-year Strategic Plan lists one goal as broadening access to Brookes education which includes diversifying the student population and tracking the number of students studying by Distance Learning.

University of Oxford Strategic Plan 2018-24[10]

4.9 The University of Oxford's strategic plan sets out a framework of priorities for the University and its departments. Its key themes are Education, Research, People, Engagement and Partnership, and Resources.

4.10 In terms of Education, the Plan lists some relevant priorities to changing student demographic. By 2023 it seeks to; increase "*the number of undergraduate places offered to students from groups who are currently under-represented", "undergraduate student intake by up to 200 a year", "postgraduate taught student intake by up to 450 a year and postgraduate research student intake by up to 400 a year*" and finally *"in partnership with the private sector, to have started the construction of 1,000 additional graduate rooms".*

4.11 In regards to Research, one key priority of the University is to *"invest substantially in the research environment, both human and physical (including the estate, libraries, collections, equipment and IT) by 2023".*

4.12 In the theme of People, the University commits to working towards a more diverse staffing profile and also prioritises housing for staff seeking to *"develop an equitable and transparent means of allocating new affordable homes for University and college staff".*

4.13 In respect of Engagement and Partnership, the University lists no priorities that are directly relevant to this study but does commit generally to engaging with the public and with policy makers.

4.14 Finally, in terms of Resources, the University prioritises the delivery of *"a capital investment programme in the estate and IT of at least £500 million by 2023"* and *"to have started the construction of at least 1,000 new subsidised homes for University and college staff".*

[10] Strategic Plan 2018-24.pdf (ox.ac.uk)

Forecasting University Student Numbers

4.15 In order to understand the future needs for student accommodation it is first important to understand the existing need. Section 2 above discusses the existing profile of students in the city and can be summarised as below.

4.16 The Council's AMR data from 2021/22 considers there to be 42,548 students registered at both Universities: of these students, 36,135 study full time (85%). The table below lists the exclusion criteria for each university and the number of students excluded from the needs calculation from the 2021/22 AMR returns.

Table 4.1 University AMR Return data (2021/22)

	Uni of Oxford	Oxford Brookes
Total Students	26,439	16,199
Part-time and short-course students	3,797	2,616
Students studying a Further education course or a foundation degree	0	99
Students studying a research based post-graduate degree	6,551	153
Vocational course students who will at times be training on work placements	189	1,718
Students with a term-time address outside of the city (OX1, 2, 3, 4)	537	1,703
Students living within the city (OX1, 2, 3, 4) prior to entry onto a course	200	325
Students not attending the institution or studying at a franchise institution	56	905
Students studying outside Oxford (i.e., Swindon campus)	0	262
Students on a year abroad and other placement students away from the university	215	307
Specific course exclusions (BTh Theology and MTh Applied Theology)	21	N.A.
Students who also have an employment contract with the university	0	N.A.
Students in Private Student only accommodation	N.A	317
Students with accommodation requirements	**14,873**	**7,794**
Accommodation places provided	**13,382**	**5,161**
Total students outside of Uni accommodation	**1,491**	**2,633**

Source: Oxford City Council AMR data

4.17 With the exclusions taken into account, there were considered to be 22,577 students in 2020/21 that required accommodation between the two universities. As explored in earlier sections, changes in the classification of excluded students and the calculation of accommodation need in the universities has made analysis difficult in the changing of student dynamics. As such, any use of a forecast based on this past trend data would not be able to account for these data discrepancies.

4.18 We have then sought to assess the percentage changes over time in each key group using HESA data from 2014/15 to 2021/22 that has not been subject to these changing classifications. Overall, it is clear to see that the number of postgraduates at both universities have been increasing, however their mode of study differs, with Oxford Brookes seeing a larger increase in full-time postgraduates and the University of Oxford having a higher proportion of postgraduates overall; but seeing a larger increase in part-time postgraduates. Undergraduate numbers at both universities have seen decline overall, primarily driven from decreases in part-time undergraduates, there have however been slight increases in the number of full-time undergraduates.

Table 4.2 Overall growth (2014/15-2021/22)

	Uni of Oxford (% growth)	Oxford Brookes (% growth)
All Students	4.9%	0.1%
Full-Time Students: Total	8.6%	6.8%
Full-Time Undergraduates	7.4%	1.8%
Full-Time Postgraduates	10.6%	37.7%
Part-Time Students: Total	-5.2%	-21.8%
Part-Time Undergraduates	-33.8%	-60.8%
Part-Time Postgraduates	76.9%	16.6%
Undergraduates: Total	-5.4%	-7.6%
Postgraduates: Total	23.2%	26.2%

Source: Iceni Analysis of HESA data

4.19 There have been increases seen in part-time postgraduates – including in groups who are excluded from the assessment of accommodation need. Decreases in undergraduates are also evident. These students are not excluded from the threshold policy and undergraduates are generally younger and as such, more likely to require university accommodation.

4.20 Additionally, full-time students make up a large majority of the students at both universities. At Oxford Brookes, an average of 80% of students study full time, at the University of Oxford an average of 76% study full-time. Studying full-time is clearly the preferred option for many students, given that many have access to loans etc that allow them to study full-time this can be expected. Trends in total students often track the trends in full-time students because full-time students are such a large group.

4.21 The trends shown through the HESA data are clear and indicate that the Universities have been following their strategies in terms of increasing recruitment of researchers (postgraduates). This has also worked in terms of slowing the number of students in requirement of accommodation. The HESA data shows clear trends; however, as mentioned earlier in this report it does not count for actual student numbers but rather student instances. This means that HESA data will count every student registered at the university at any point in the year, regardless of how long they were a student for; and there may be some effects in terms of students beyond Oxford.

4.22 Although inconsistencies in how the AMR data is recorded, both between the two universities and year-on-year have been identified, it still offers the most accurate baseline of student information. This is particularly when also considering the number of students excluded from the needs calculation as HESA data does not break down to this level. It is for this reason. it is considered appropriate to use this as a baseline.

4.23 Looking ahead, the Universities have indicated, through engagement with Iceni and the Council, that their plans for student growth and general expansion remain uncertain. They have stated that overall growth in the Higher Education sector is dynamic and highly dependent of factors that are not within the control of either institution. The factors include but are not limited to:

- Demographics and demand;
- Competitor behaviour, particularly in relation to offers;
- Government policy in respect of the Higher Education sector and also immigration/visas; and
- Donor/Sponsor activity.

4.24 The universities have undertaken their own forecasting exercise of student numbers; however, they have declined to share the exact rationale and outcomes of this with the Council in detail. This is due to the sensitive information contained in the forecasts that may be surprising to stakeholders if not presented in the right context.

4.25 The universities have however shared some indicative High and Low growth rates that are expected over the plan period up to 2040. These rates are different for each University reflecting the differing nature of their growth plans and characteristics. Equally, the growth rates change after the initial 5-year period reflecting the uncertainty in forecasting beyond this. The growth rates and respective time periods for each university is shown below.

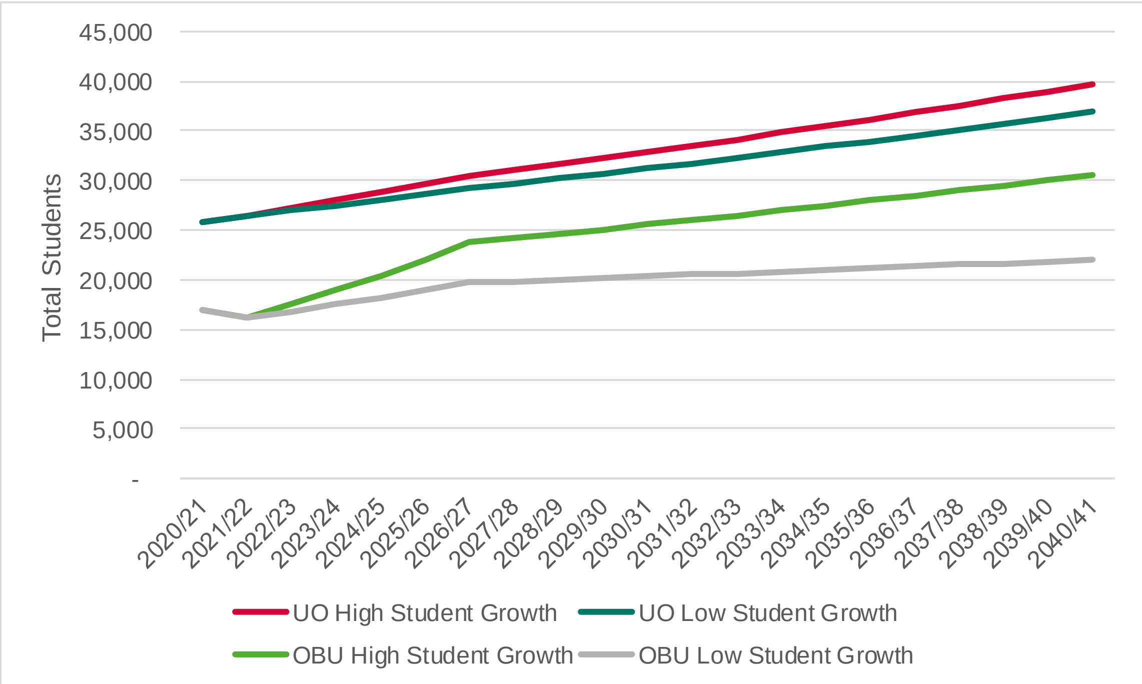
Table 4.3 **Predicted Student Growth Rates Parameters**

	Uni of Oxford		Oxford Brookes	
	High	Low	High	Low
First 5 year period	2.90%	2%	8%	4%
Beyond	1.9%	1.7%	1.8%	0.8%

Source: University of Oxford and Oxford Brookes University

4.26 The Figure below shows the overall forecasts up to 2040/41, assuming the first 5-year period applies up to the end of the 2026/27 academic year. The growth scenarios result in a total student population of between 37,00 and 40,000 at the University of Oxford in 2040/41. The projections for the same period are lower for Oxford Brookes; between 22,000 and 31,000. In terms of total students in the City, this would result in a high figure of 71,000 and a low figure of 59,000 by 2040/41. The scale of the range shown is quite significant.

Figure 4.1: High and Low growth scenarios



Source: Iceni Projects

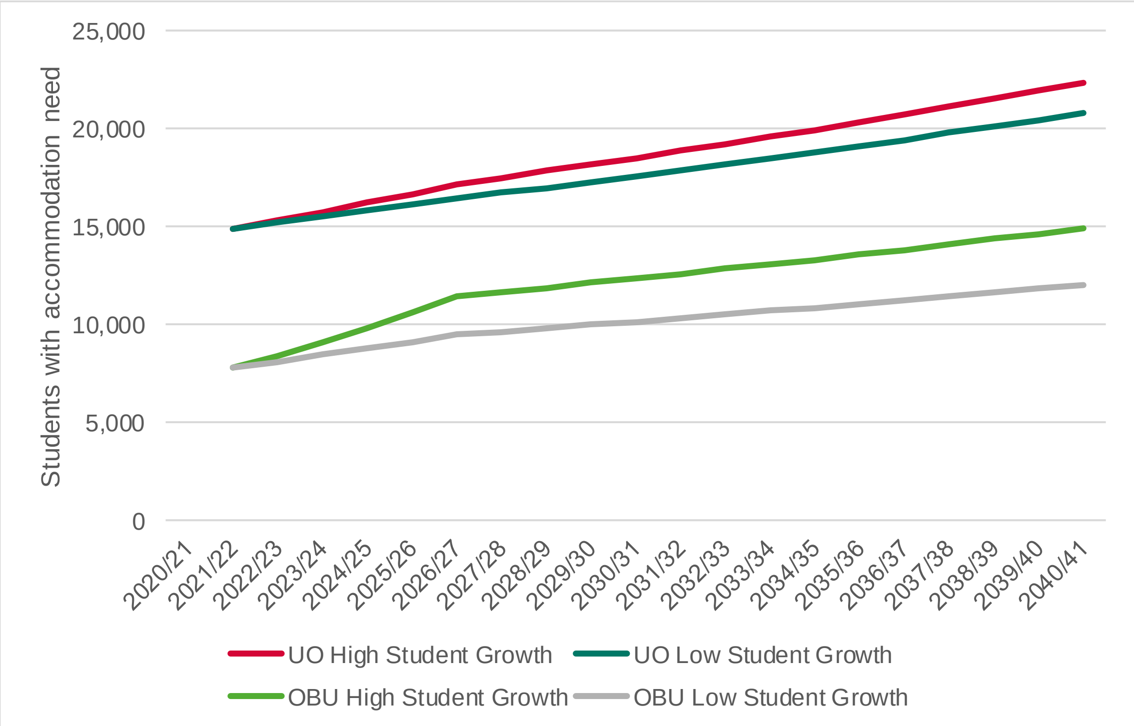
4.27 The numbers presented above relate only to total student numbers at each university and do not account for the number of students who are not considered to have a need and therefore are excluded from the need calculation. The change in AMR exclusion categories makes analysis of past trends of exclusions difficult. However, HESA data which shows the two main categories of excluded students, part-time and postgraduate research students, demonstrate that the number of students in these groups has remained reasonably stable as a proportion of overall student numbers. Furthermore, we have no specific basis to conclude that growth in one group of students is the future is likely to out-pace another.

4.28 With this in mind, we have then sought to apply the growth rates provided by the universities to the current total number of students in need of accommodation at the universities. This again results in a High and Low scenario for each institution and also works on the proviso that the categories of students excluded within the needs calculation remains the same throughout.

4.29 The scenarios are shown in the Figure below and would indicate that by 2040/41, the number of students that would be considered to have accommodation need at the University of Oxford could be between 20,000 and 22,000. This is slightly lower at Brookes of between 12,000 and 15,000. Overall, the City could see between 32,000 and 37,000 students with accommodation need.

4.30 The growth in FT students in Oxford with accommodation needs could increase to 2040/41 by between 9,800 (low) and 14,200 (high).

Figure 4.2: High and Low students with accommodation need scenarios



Source: Iceni Projects

Different University Groups

Full Time Students

4.31 We have also sought to analyse the growth of groups within the student body using the identified growth rates. HESA data as explored in section two shows the number of student instances that occurred in Full-Time and Part-Time, Undergraduate and Postgraduate Taught groups. The number of students in Full-Time groups as reported by HESA in 2020/21 and the expected number of student instances (rounded to the nearest hundred) for each university in 2040/41 is shown in the tables below.

Table 4.4 University of Oxford, HESA based growth for Full-Time Groups

Group Type	2020/21	Growth Rate	2040/41
Full-Time Undergraduate	12,270	High	19,000
	12,270	Low	17,500
Full-Time Postgraduate Taught	3,780	High	5,800
	3,780	Low	5,400

Source: Iceni Projects, HESA

Table 4.5 Oxford Brookes, HESA based growth for Full-Time Groups

Group Type	2020/21	Growth Rate	2040/41
Full-Time Undergraduate	11,715	High	23,900
	11,715	Low	16,600
Full-Time Postgraduate Taught	2,415	High	4,900
	2,415	Low	3,400

Source: Iceni Projects, HESA

Groups without need

4.32 Although the HESA data used for these forecasts can indicate the extent of growth in these groups, given that the base data records the number of student instances in any given year and not the student count, it likely overrepresents the numbers of students overall. It is therefore prudent to assess the growth of groups of students who are not considered to have accommodation need. The below tables consider the largest of these groups as shown in the most recent AMR data and how these may grow at each of the universities up to 2040/41.

Table 4.6 University of Oxford, groups without need

Group Type	2021/22	Growth Rate	2040/41
Part Time	3,797	High	5,700
	3,797	Low	5,300
Post Graduate Research	6,551	High	9,800
	6,551	Low	9,200
Other Groups not considered to have need	1,218	High	1,800
	1,218	Low	1,700
Total Without Need	11,566	High	17,400
	11,566	Low	16,200

Source: Iceni Projects, Oxford City Council

Table 4.7 Oxford Brookes, groups without need

Group Type	2021/22	Growth Rate	2040/41
Part Time	2,616	High	4,900
	2,616	Low	3,600
Vocational Course Students	1,718	High	3,200
	1,718	Low	2,300
Those with a term-time address outside of Oxford (OX1,2,3,4)	1,703	High	3,200
	1,703	Low	2,300
Other Groups not considered to have need	2,368	High	4,500
	2,368	Low	3,200
Total Without Need	8,405	High	15,900
	8,405	Low	11,400

Source: Iceni Projects, Oxford City Council

Future Growth in Student Accommodation

University Associated PBSA Pipeline

4.33 There are currently a further 5 University of Oxford schemes under construction that are expected to deliver 357 new bedspaces. University Colleges redevelopment scheme at Fairfield, Banbury Road will be the largest scheme since 2016 once finished with a gross delivery of 276 bedspaces, 118 of which will be new. One further smaller scheme also has permission, this scheme is not associated to a specific college but intends to deliver a further 3 bedrooms for postgraduates via the subdivision of existing rooms.

Table 4.8 Pipeline University of Oxford Associated PBSA

Application Number	Site Name/ Address	College Association	Planning Status	Expected Bedspaces
20/00116/FUL	Fairfield, 115 Banbury Road	University College	Under Construction	118 (net) 276 (gross)
19/02601/FUL	Frewin Quad, New Inn Hall Street	Brasenose College	Under Construction	26 (gross & net)
19/02306/FUL	Castle Hill House, 9 New Road	St Peter's College	Under Construction	54 (gross & net)
19/02032/FUL	Sir Geoffrey Arthur Building, Long Ford Close	Pembroke College	Under Construction	85 (gross & net)
17/03330/FUL	2 Savile Road	New College	Under Construction	74 (net) 102 (gross)
21/03177/LBC	The Mansion, Court Place Gardens	Oxford University	Approved Jan 22. Not commenced	3 (gross & net)
			Total:	**360 (net) 546 (gross)**

Source: Oxford City Council Monitoring Data

4.34 Oxford Brookes University will also see a growth in bedspaces by virtue of the redevelopment of the Clive Booth Student Village which intends to deliver significantly more bedspaces than the existing site. Built in 1970, the site currently provides 640 bedspaces for students which are now outdated and not suited for modern student uses. Of the current 640 rooms, 462 are due to be demolished with a total of 1,035 new bedrooms constructed in place. Once finished the number of students housed will almost double increasing to a total of 1,213 bedrooms within the village. This site was allocated within the local plan and granted permission in January 2022.

Table 4.9 Pipeline Brookes Associated PBSA

Application Number	Site Name/ Address	College Association	Expected Bedspaces	Planning Status
21/01185/FUL	Headington Hill and Clive Booth	Oxford Brookes	573 (net) 1035 (gross)	Approved Feb 22. Not commenced

Source: Oxford City Council Monitoring Data

4.35 In addition to the sites with planning permission, there are an additional 9 local plan allocations across Oxford. Not all of these are being carried forward into the new Oxford Local Plan 2040 or being counted in the latest Housing and Employment Land Availability Assessment. The current allocations were earmarked to provide an additional 1,553 new bedspaces. Consultation with the University has shown that some of these allocations are unlikely to come forward for student housing. As yet, no planning applications have been received for these allocations, 8 of which (with the exception of SP2) are in proximity to Oxford University buildings or under their control. The table below details the net gain of student bedspaces from these sites as detailed in the most recent HELAA. A total of 1,101 bedspaces are expected across the 5 sites that are envisaged to be taken forwards. The table also shows in italics the current allocations which are not envisaged to be taken forwards and which are no longer being counted in the HELAA.

Table 4.10 Student Accommodation Allocations

Allocation	Site Name/ Address	Allocated Use	Maximum Bedspaces
SP62	West Wellington Square	Academic institutional uses, employer-linked affordable housing, student accommodation	**45**
SP6	Diamond Place and Ewert House	Residential development, employment, student accommodation	**200** *(220 previously expected)*
SP45	Land off Manor Place	Student accommodation, car free residential development or mixture of both	**108** *(200 previously expected)*
SP31	Banbury Road University Sites (now Land at Winchester Road)	Academic institutional uses, employer-linked affordable housing, student accommodation	**130** *(150 previously expected)*
SP2	Osney Mead	Mixed use development including employment uses, academic uses, student accommodation, employer-linked affordable housing and market housing	**618** (based on 2.5 ratio to minimum housing figure)
SP36 (Not envisaged to be taken forwards)	*Faculty of Music, St Aldates*	*Academic institutional uses, employer-linked affordable housing, student accommodation*	*100*
SP54(Not envisaged to be taken forwards)	*Radcliffe Observatory Quarter*	*Academic institutional uses, employer-linked affordable housing, student accommodation*	*120*
SP58 (Not envisaged to be taken forwards)	*Summertown House, Apsley Road*	*Residential development, employer-linked affordable housing, student accommodation*	*50*
SP60 (Not envisaged to be taken forwards)	*University of Oxford Science Area and Keble Road Triangle*	*Residential development, academic institutional uses and associated research*	*50*
		Total initially allocated:	1,553
		Total expected to be taken forwards:	**1,101**

Speculative PBSA Pipeline

4.36 In addition to University-associated PBSA schemes, there are a number of Speculative PBSA schemes in the pipeline for Oxford, that would see a total of 349 new bedspaces.

Table 4.11 Speculative PBSA Pipeline

Ref:	Site Name/ Address	Planning Status	Expected Bedspaces
19/00622/FUL	162-164 Hollow Way	Completed	16
21/00300/FUL	17, 17A, 17B And 19 Between Towns Road	Approved – Not Commenced	189
20/00843/FUL	164 Cowley Road	Completed	7
19/01821/FUL	159-161 Cowley Road'	Completed	137
		Total:	**349**

Source: Oxford City Council Monitoring Data

4.37 In total it is expected that a net number of 2,383 bedspaces (gross 3,031) could potentially be delivered across all types of student accommodation in Oxford. Much of this (1,101 bedspaces) lies within allocated sites that are expected to be rolled forwards in close proximity to University of Oxford premises or under their ownership that do not yet have planning permission.

Letting Agent Commentary

4.38 As explored earlier in this report, lettings agents working with students in Oxford were generally positive about the outlook of the private student rental market, despite general market uncertainty and the overall impact of Covid. When questioned over the impact of the increasing numbers of PBSA bedspaces in the city, only one agent viewed this as a potential issue to their business, citing general supply and demand economics; that an increase in supply of PBSA bedspaces would impact the student HMO market. However, the same agent did also believe that the professional HMO rental market, which was considered strong in Oxford, had the potential to fill this gap.

Macroeconomic Factors Impact

4.39 As mentioned earlier in this report, several attempts have been made to engage with the University of Oxford and with Oxford Brookes University in regard to future development and expansion, as well as the impacts each university has seen from macroeconomic factors such as the Covid-19 pandemic and Brexit. Although the universities have engaged to some extent on the impacts, they have not provided any specific information. As such we have looked to research the general impact of these factors on university students as a whole.

Brexit

4.40 Survey responses of the non-university institutions in Oxford generally did not see Brexit as a particularly limiting factor in their operations, with only one viewing it as a cause to be more cautious. However, when questioned on if the availability of student visas would influence their business, 4 institutions considered that demand would decrease if these were less readily available. Given that many of these institutions are dedicated to teaching English as a foreign language or providing international students with British qualifications, this is unsurprising. The limited cautiousness surrounding Brexit from these institutions indicates their largely international (non-EU) student base who are not impacted by the loss of freedom of movement caused by Brexit.

4.41 This is also seen somewhat in both the national picture for universities and the Oxford universities, where HESA data shows a decrease in European student enrolment coupled with an increase in non-EU enrolment, reflecting the end of home student fee eligibility for EU students and the introduction of the graduate route visa scheme for non-EU students.

Covid

4.42 Of the non-university education institutions in Oxford views on the impact of Covid were mixed. One institution viewed the pandemic as a reason for them to be more cautious where another saw it as an opportunity for growth and expansion. Two institutions considered it to have had no overall effect on their business.

4.43 Nationally the impact of Covid on students and universities appeared quite severe towards to beginning of the pandemic. A report by the Government's Petitions Committee[11] released in July 2020 in response to four petitions calling for refunds of tuition fees and rental costs for students throughout the pandemic reached over half a million signatures. The report concluded that Covid had significantly disrupted the education of many university students with many feeling they were not receiving the standard of education they expected. Further research conducted later in the pandemic (January to April 2021) by the National Student Survey (NSS)[12] generally supported the idea that students were unhappy with the education they were receiving. Comparison of survey results from 2020 to 2021 saw levels of satisfaction decrease across all scales from teaching to organisation to student voice.

4.44 Despite this overall decrease in students' satisfaction throughout the beginnings of the pandemic and particularly the 2020/21 academic year, national enrolment data from HESA[13] saw an increase in the number of first year students in both the 2020/21 (10% increase on 2019/20) and the 2021/22 (2% increase on 2020/21) academic years. Office for Students research[14] attributes this increase in part to an increase in the number of top grades awarded. This has impacted the University of Oxford in particular as a leading higher education institution seeing its total number of students increase by 5.3% from 2019/20 to 2020/21.

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[11] The impact of Covid-19 on university students (parliament.uk)

[12] Insight 10 July 2021 The National Student Survey: Student experience during the pandemic (officeforstudents.org.uk)

[13] The impact of the COVID-19 pandemic on 2021/22 Student data | HESA

[14] Insight brief 13: Schools, attainment and the role of higher education (officeforstudents.org.uk)

4.45 The potentially largest impact that Covid has had on educational institutions will be changes in work and study patterns. A shift to online learning and homeworking throughout the pandemic has continued to some extent. When non-university institutions in Oxford were asked if they planned to repurpose any teaching space for other uses, only one responded that they were considering it but had no fixed plans to do so, whereas three had no intention to repurpose teaching space. Given that many schools and colleges in the UK have returned to full-time face to face teaching, it is unsurprising that many non-university institutions are aligning with this.

4.46 In the absence of detailed information from the University of Oxford and Oxford Brookes, it is difficult to ascertain what potential future expansion or growth plans to expect. However, given the drop in student satisfaction experienced during Covid as a result in decreased time spent in face-to-face teaching and availability of academic resources such as libraries; as well as the increasing numbers of students entering the universities, it would be difficult to assume that the shift towards homeworking seen within the general population would be fully applicable to students and academic staff.

Monitoring of supply and the threshold

4.47 The Council have made changes to the criteria used to identify students without accommodation need at both universities. These changes have largely been made to ensure the approach at the two universities is fair and consistent. However, consultation with the universities has shown that where the categories have attempted to be consistent, the data collected between the two is not.

4.48 Previously, the University of Oxford chose to exclude the rooms they provide that are occupied by research based post-graduates as part of their bedspace provision supply count in the AMR. After discussions with the University, these are now counted towards the supply, and corresponds with how Oxford Brookes calculate their bedspace provision as they include those rooms occupied by vocational course students. in their AMR return. The counting of students occupying private sector PBSA bedspaces is also important. It is understood that Oxford Brookes does not intend to renew any of its existing nominations agreements with private sector PBSA with the last one expiring in 2029. It is acknowledged that the expiry of these agreements does not necessarily mean the loss of the bedspaces all together. It is for this reason that the taking into account the supply of PBSA bedspaces is encouraged. Although the group is currently considered as excluded from the needs calculation it is believed that this has been underrepresented.

Future Growth in Students Vs Future Student Accommodation

4.49 Figure 4.2 in the section above demonstrates a modelled outlook of students requiring accommodation at the University of Oxford and Oxford Brookes in 2040. Overall, this model would see total numbers of students requiring accommodation in the City rise to between 59,000 and 71,000 by 2040/41, with between 37,000 and 40,000 at Oxford University and 22,00 and 31,000 at

Brookes. In terms of students with accommodation need this results in a total of between 32,000 and 37,000 by 2040/41, with between 20,000 and 22,000 Oxford University and 12,000 and 15,000 at Brookes

4.50 As shown in the tables below, by 2040 there may be between 9,762 and 14,762 students in need of additional accommodation in Oxford beyond the existing provision of 19,521 beds and pipeline supply of 2,717 beds.

Table 4.12 Supply Demand Balance

Oxford Brookes University	Low	High
Full Time Students requiring accommodation in 2040	12,000	15,000
Minus the current supply of PBSA bedspaces	3,068	
Minus the pipeline supply of net additional University planned PBSA bedspaces	573	
Future additional accommodation need by 2040	8,359	11,359

University of Oxford	Low	High
Full Time Students requiring accommodation in 2040	20,000	22,000
Minus the current supply of PBSA bedspaces	16,453	
Minus the pipeline supply of net additional University planned PBSA bedspaces	1,461	
Future additional accommodation need by 2040	2,086	4,086

Total	Low	High
Full Time Students requiring accommodation in 2040	32,000	37,000
Minus the current supply of PBSA bedspaces	19,521	
Minus the pipeline supply of net additional citywide PBSA bedspaces	2,383	
Future additional accommodation need by 2040	10,096	15,096

5. CONCLUSION AND RECOMMENDATIONS

5.1 This final section of the report seeks to draw together the Study findings and address key issues which the Council will need to assess in the formulation of planning policies. In drawing firm conclusions, land supply considerations will also need to be taken into account.

Context

5.2 The National Planning Policy Framework is clear that the needs of students should be assessed and reflected in planning policies.

5.3 Oxford has a significant housing need but a constrained land supply, with different forms of development competing with one another. The City is one of the least affordable places to live in the country, and the Council has a history of successfully managing its housing market and restricting pressure from student growth on the general housing stock and availability of properties in the private rented sector within this. The Study aim is to provide a robust evidence base from which consideration can be given to how to manage student accommodation in the future, including reviewing the threshold number of students living outside of university-managed accommodation; and policies for the delivery of purpose-built student accommodation (PBSA).

5.4 The current 2036 Local Plan includes policies which restrict delivery of new student accommodation to sites which are either allocated, in the city centre, or adjacent to an existing university/college campus. It restricts the development of new academic space where the numbers of students on full-time taught courses living outside of non-university-provided accommodation exceeds certain thresholds: currently 4,000 - 4,500 for Oxford Brookes and 1,500 for the University of Oxford.

Student Numbers

5.5 In Oxford at the point of the 2021 Census there were 32,888 students, a 10% increase from the 2011 Census of 29,924 full-time students aged 18 and over. The area has two higher education establishments which are in close proximity the University of Oxford and Oxford Brookes, as well as a number of further education colleges and Language Schools.

5.6 HESA data records relative stability in total student instances at Oxford Brookes University as a whole; albeit within this there will have been changes between its campuses with the opening of a campus in Swindon and wind down of the Wheatley Campus. Full-time student numbers have similarly remained relatively stable, albeit with a modest effect recorded from the effects of Covid on increasing admissions in 2020/21 and 2021/22. 82% are on full-time courses.

5.7 Oxford University student instances have been growing since 2016/17, but the number of full-time students had remained relatively stable at around 25,000 prior to Covid. The 2020/21 and 2021/22 years saw this increase to just over 27,000 full-time students as offers were accepted on predicted grades. The University has a much higher proportion of postgraduate students than Brookes. A recent trend has been growth in distance learning.

5.8 The effects of Brexit appear to be seen in the changing composition of international students, with a growth from those outside of the EU.

5.9 Analysis of data provided by the universities themselves and recorded in Authority Monitoring Reports by the Council overall points to a similar picture at Brookes, of relatively flat overall student numbers. At Oxford University it shows total students growing, in particular since 2013/14 – when total student numbers were 22,100 to 26,100 in 2021/22.

5.10 Iceni has therefore sought to estimate the changes in such students by looking at categories where there appears to be consistent data available over time. This suggests modest growth in students needing accommodation at University of Oxford, with stronger growth at Brookes. The latter two Covid years look anomalous, and if these are excluded, a growth rate of 0.7% pa at University of Oxford and 2.3% pa at Brookes is shown. It is this growth which is expected to particularly influence the housing market effects of the student population.

5.11 The analysis of FE students and those at language schools indicates that numbers at these institutions are much smaller. FE are more focused towards those likely to live at home; and in respect of language schools, they are more focused towards short courses in the summer period when there is likely to be greater accommodation availability. The housing market impacts associated with these are therefore considered modest.

5.12 There are estimated to be around 762 students based at Further Education colleges in Oxford. Most of these courses follow the school academic calendar with breaks over Christmas, Easter and Summer. Across the 10 Language Schools assessed, during their peak week of student enrolment, there is an estimated 1,984 students studying in Oxford. Typically, this peak lands in the summer months with July being stated as the most popular for courses.

Accommodation Provision

5.13 Oxford University has a much higher level of student accommodation provision than many universities with 16,450 bedspaces, whilst Brookes has around 5,200 bedspaces in stock it owns/manages and schemes for which it has nominations agreements.

5.14 A notable function of the student housing market in Oxford is however the scale of university-provided provision, which alongside the land supply constraints and the policy framework has meant less growth in privately-run purpose-build student accommodation compared to other student cities.

5.15 Many of the colleges and language schools provide accommodation for students. For language schools it is estimated that 13% of students organise their own accommodation by either staying with their own family or staying in privately rented rooms. Further Education colleges also provide accommodation, with most students within homestay or other provided residential accommodation.

5.16 The Study's analysis points to students living within the wider market. HMOs are spatially concentrated in Oxford in certain areas, including the City Centre, around Iffley and around Cowley Road, Botley Road, Jericho and Headington in particular. An over-concentration of HMO accommodation can lead to impacts on residential amenity as well as an imbalance in communities and the mix of housing. A restrictive policy framework in the current Local Plan and through mandatory licencing provides the potential for the Council to manage the growth of this sector.

Future Student Growth

5.17 Informed by data provided by the universities, the total student population at the two universities could grow by between 16,700 and 27,900 students over the period from 2020/21 to 2040/41. On the assumption that the proportion of students requiring accommodation remains consistent, the Study projects that students with accommodation needs could rise by between 9,800 – 14,800 FT students.

5.18 There is a net total pipeline of 2,383 bedspaces on sites which either have planning permission or are allocated for student development. Nearly half of these bedspaces (1,101) are expected on allocated land that is yet to achieve planning permission.

5.19 This scale of potential student growth exceeds the current supply pipeline by a significant margin, raising particular policy questions for the Council, which are considered in the next section. The evidence clearly shows that the current thresholds for students living outside of university accommodation could be breached over the plan period. The timing of this will depend on the pace of student numbers growth relative to that for accommodation.

Moving Forwards

5.20 Given what has been discussed in this report, the case for managing student accommodation within Oxford clearly remains. The Cherwell and Oxford City Housing and Economic Needs Assessment 2022 highlighted particular affordability pressures in the City with a clear need for affordable housing but there is a constrained land supply available to deliver this. However, in a slightly wider context, Local Plans in the wider Oxfordshire county seek to provide a somewhat increased growth in housing provision around the City, particularly up to 2031.

5.21 Students have a particular desire to be within the City itself. Students typically prefer to be in proximity to their University for lectures, and the City Centre for services and nightlife. They often seek to live in areas with good transport links to these and as such, tend to congregate in specific locations. In the case of Oxford, this appears to be largely across a central belt spanning from the City Centre across to the Oxford Brookes campus in the East.

5.22 The Council's existing policy framework currently seeks to manage student growth in the following ways; a restriction on university development if the number of students living outside of university-provided accommodation exceeds a threshold; a policy that restricts the delivery of new student accommodation to particular locations; and increased HMO licencing in the City. It is important that the Council continues to balance their consideration of the important economic role that the universities play in supporting Oxford's wider economy, the potential land available for development, and the alternative pressures for other forms of housing on the land available.

5.23 If the Council were to take an approach of maintaining the student accommodation thresholds currently in place, this is likely to drive an increased focus of university recruitment on postgraduate research and part time courses (i.e. those that the threshold does not apply to). If considering increasing or removing these thresholds, the Council might provide greater policy support for delivery of student accommodation by the universities themselves and other private PBSA providers. In doing so, it could recognise the geographical concentration of student demand relative to the potential for wider demand – such as for general market housing – to be dispersed to other locations. In addition, the Council should continue to seek affordable housing contributions from PBSA delivery to support off-site provision of affordable homes on other sites.

5.24 Alternatively, there is potential for the supply position to inform where these thresholds are set moving forwards. This will need to have regard in particular to the potential available land supply to support delivery of student accommodation.

5.25 Ultimately it is for the Council to assess its relative priorities. It is important to note that without the thresholds in place there are a range of potential wider impacts. Namely, the growth of students living in wider market housing, including HMOs. In turn, this could increase pressure on the private rental sector (particularly at the lower cost end) and could fuel rental growth. This could well reduce the ability of this sector to house lower income households, and result in increased levels of homelessness – with direct impacts and costs on the Council, and households concerned. This does, in Iceni's view, lend itself to a continuing case for maintaining policies seeking to manage growth in the student population.

5.26 Ultimately if thresholds are set, the forthcoming local plan will need to have regard to the evidence in this Study, but also issues related to the available land supply (and choices as to what land is allocated for PBSA/ student housing development).

5.27 Should the Council be minded to provide a more flexible framework to allowing university growth, it might consider relaxing the policy framework to encourage delivery of PBSA. This has the potential to support Oxford's economy but may have an impact on the ability to meet other housing needs in the City.

A1. SUMMARY OF EDUCATION INSTITUTIONS ASSESSED AS PART OF THE STUDY

Education Institution	Survey Response	Notes/Comments
University Institutions		
Oxford Brookes University	Yes	Further discussions have taken place
University of Oxford	Yes	Further discussions have taken place
Language Schools		
Kaplan International Languages	No	British Council Report (March 2020) used. Available here: https://www.britishcouncil.org/sites/default/files/kaplan_intl_oxford_full_2020_post_asac_148.pdf
Alliance Francoise d 'Oxford	No	Phone conversation had to help answer the survey with further information provided from the Trustees' Report for 2021
The Oxford English Centre	Yes	British Council Report (March 2022) used. Available here: https://www.britishcouncil.org/sites/default/files/oxford_english_centre_full_2022_post_review_asac_pub_0.pdf
Regent Oxford	No	Phone conversation and information provided online at: https://www.regent.org.uk/learn-english/language-schools/study-in-oxford
College of International Education	Yes	Private further Education report: https://www.oxcoll.com/wp-content/uploads/2020/04/pfe-report-2018.pdf
Oxford School of English	No	British Council Report (2018) Available here: https://www.britishcouncil.org/sites/default/files/oxford_sofe_adults_full_2018_.pdf
Oxford College of English	No	Phone Conversation and website information: https://www.oxfordcollege.co.uk/oxford
Oxford International English School	No	British Council Report (October 2021) used. Available here: https://www.britishcouncil.org/sites/default/files/oieg_oxford_2021_post_asac.pdf
Oxford International Study Centre (OISE)	Yes	British Council Report (August 2019) used. Available here: https://www.britishcouncil.org/sites/default/files/oise_oxford_full_2019_.pdf
Oxford International Language School (Oxford ILS)	No	British Council Report (October 2016) Available here: https://www.britishcouncil.org/sites/default/files/oxford_ils_full_2016_post_review.pdf
EF	No	British Council Report (March 2019) used. Available here: https://www.britishcouncil.org/sites/default/files/ef_oxford_full_2019_.pdf

Education Institution	Survey Response	Notes/Comments
FE Colleges		
Activate Learning- City of Oxford College	No	British Council Report (May 2022) available here: https://www.britishcouncil.org/sites/default/files/activate_learning_oxford_full_2022_published.pdf
St Clare's International College	Yes	British Council Report (August 2018) used. Available here: https://stclares.ac.uk/wp-content/uploads/st_clares_full_revised_2018.pdf
Carfax College – Independent College	No	Ofsted Report (2019) available here: https://files.ofsted.gov.uk/v1/file/50134718
EMBS Community College	No	Ofsted Report (2013) available here: https://files.ofsted.gov.uk/v1/file/2316015
Kings Education Oxford	Yes	Ofsted Report (2019) available here: https://files.ofsted.gov.uk/v1/file/50069246

Language or FE Colleges not Considered as part of this Study

Education Institution	Survey Response	Notes/Comments
FE Colleges		
The Oxford Academy	No	A secondary school therefore not answering the survey
Oxford Learning College	No	Online distance learning college no accommodation provided and students can tune in from anywhere.

A2. HMO LICENCES

Ward	Number of HMO's	The proportion of Total HMO Licences	Rate per 1,000 population
Barton & Sandhills	30	0.8%	4.1
Blackbird Leys	20	0.5%	3.1
Carfax & Jericho	174	4.5%	21.5
Churchill	302	7.7%	39.6
Cowley	134	3.4%	17.5
Cutteslowe & Sunnymead	38	1.0%	5.6
Donnington	433	11.1%	59.8
Headington	205	5.3%	28.8
Headington Hill & Northway	98	2.5%	15.1
Hinksey Park	215	5.5%	38.5
Holywell	2	0.1%	0.3
Littlemore	74	1.9%	11.9
Lye Valley	180	4.6%	25.3
Marston	128	3.3%	17.5
Northfield Brook	4	0.1%	0.6
Osney & St Thomas	200	5.1%	30.8
Quarry & Risinghurst	111	2.8%	15.7
Rose Hill & Iffley	71	1.8%	10.0
St Clement's	527	13.5%	88.0
St Mary's	580	14.9%	80.0
Summertown	31	0.8%	4.8
Temple Cowley	191	4.9%	27.6
Walton Manor	129	3.3%	22.4
Wolvercote	26	0.7%	5.3