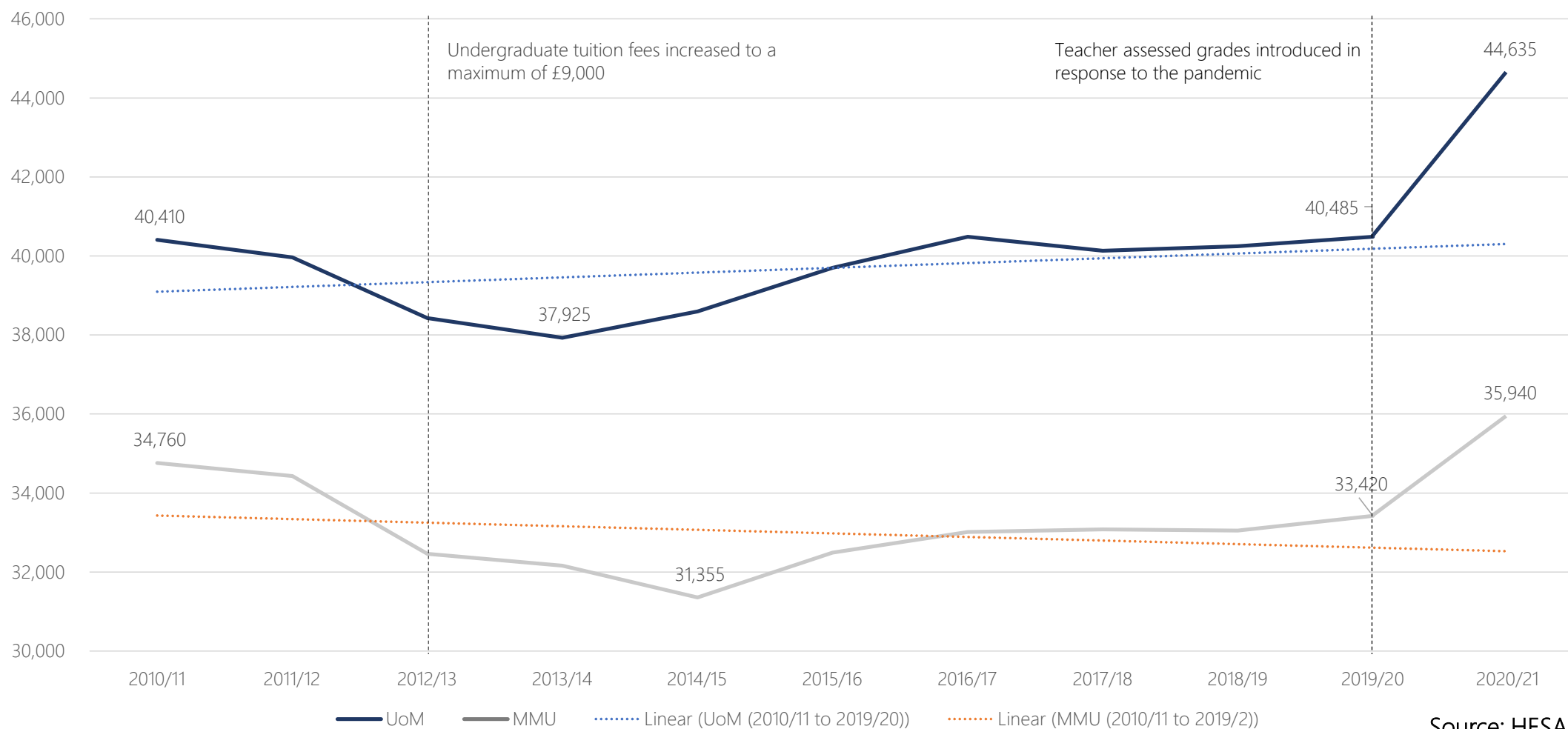

Deansgate South - Proof of Evidence

Evidence of Student Need – Appendices

Nicholas Cole

Appendix 1 – Student enrolments at UoM and MMU (2010/11 – 2020/21)

The number of enrolments recovered following a significant drop off in response to student fees increasing in 2012/13 before increasing in 2020/21 as the unintended consequence of teacher assessed grades

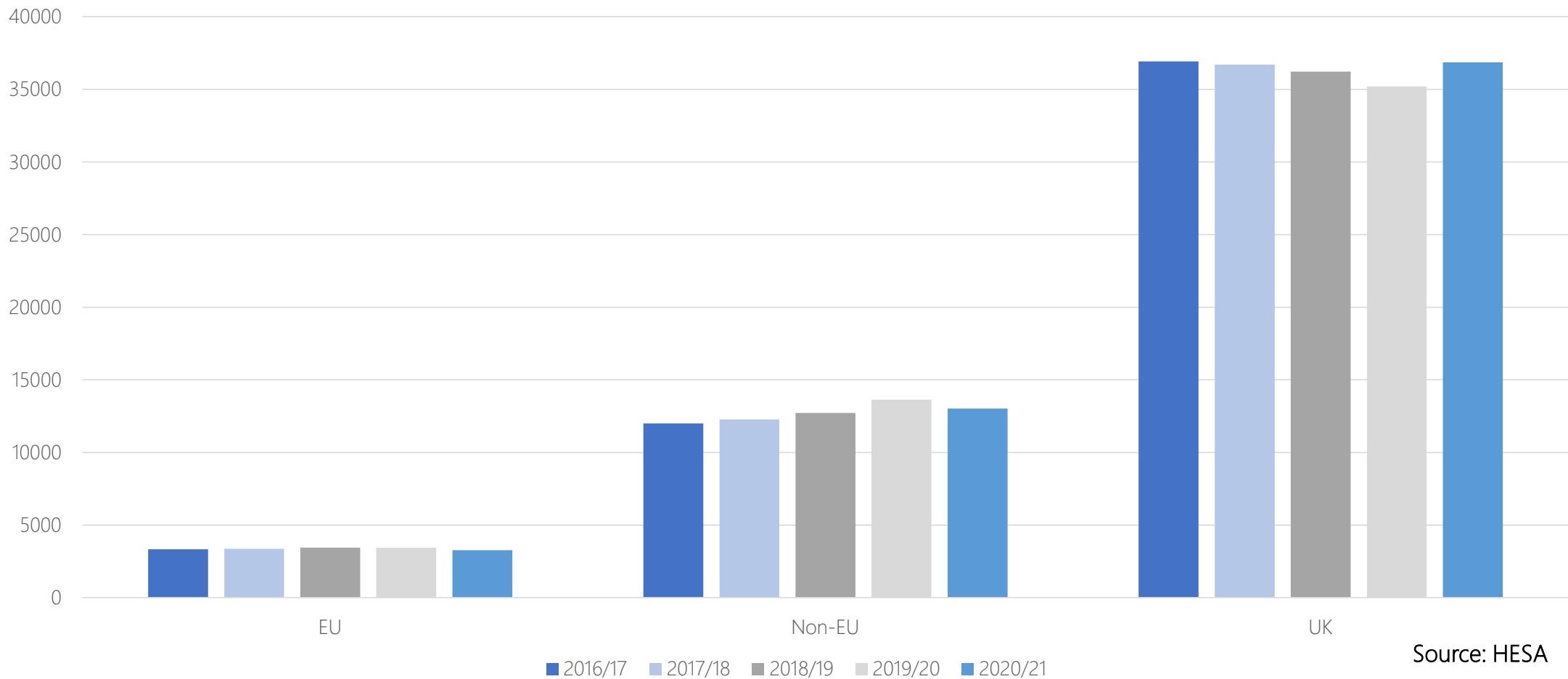


Source: HESA

Appendix 2 – Manchester’s student population has been internationalising without growing significantly

Non-EU students living in Manchester have increased by 14% between 2016/17 and 2019/20 whilst UK students have decreased by 5%

All students (UG&PG) living in Manchester during term time



Appendix 3 - In the city centre students overwhelmingly want to live on the Oxford Road Corridor

In mainstream accommodation in the city centre (where students exercise most choice) 50% of households were in the Corridor

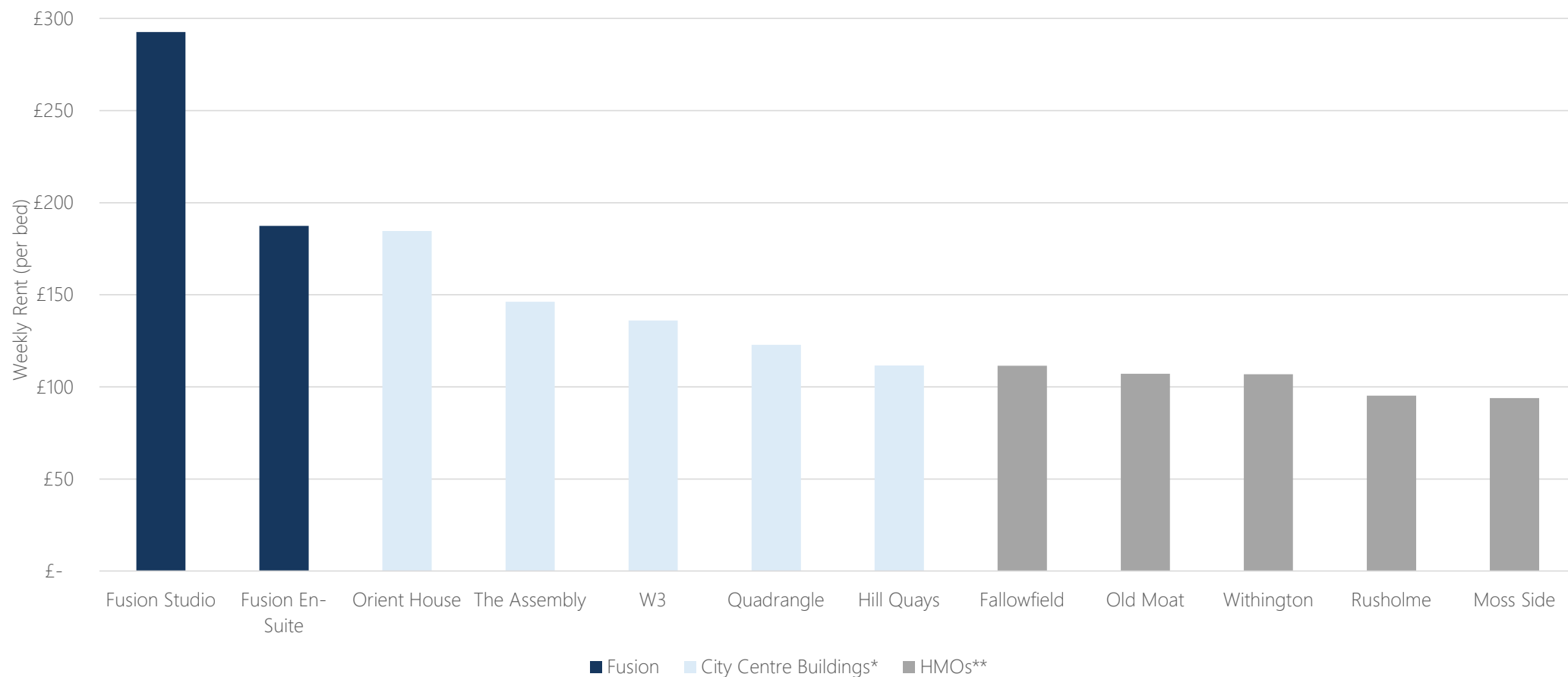
City Centre Neighbourhood	PBSA Households – Council Tax Exemption M	Mainstream Student Households – Council Tax Exemption N	Total Student Exemptions
Oxford Road North	1,975	1,031	3,006
Oxford Road South	1,111	595	1,706
Owen Street & First Street	426	429	855
Hulme Park & Birley Fields	134	325	459
Piccadilly Basin	299	84	383
Northern Quarter	8	160	168
Deansgate & Spinningfields	0	162	162
City Centre North	28	132	160
Castlefield West	1	114	115
Ancoats & New Cross	2	96	98
New Islington	0	82	82
Castlefield	0	45	45
Grand Total	3984	3255	7239

Source: MCC Council Tax June 2019 - (more recent data not representative of student demand due to the impacts of Covid-19)

Appendix 4 - Fusion rents are priced well above the HMO market & mainstream city centre PRS

Prices are more closely aligned to premium mainstream city centre apartment blocks (albeit still above)

Council Tax data suggests students are unlikely to switch to more expensive, less well located accommodation options



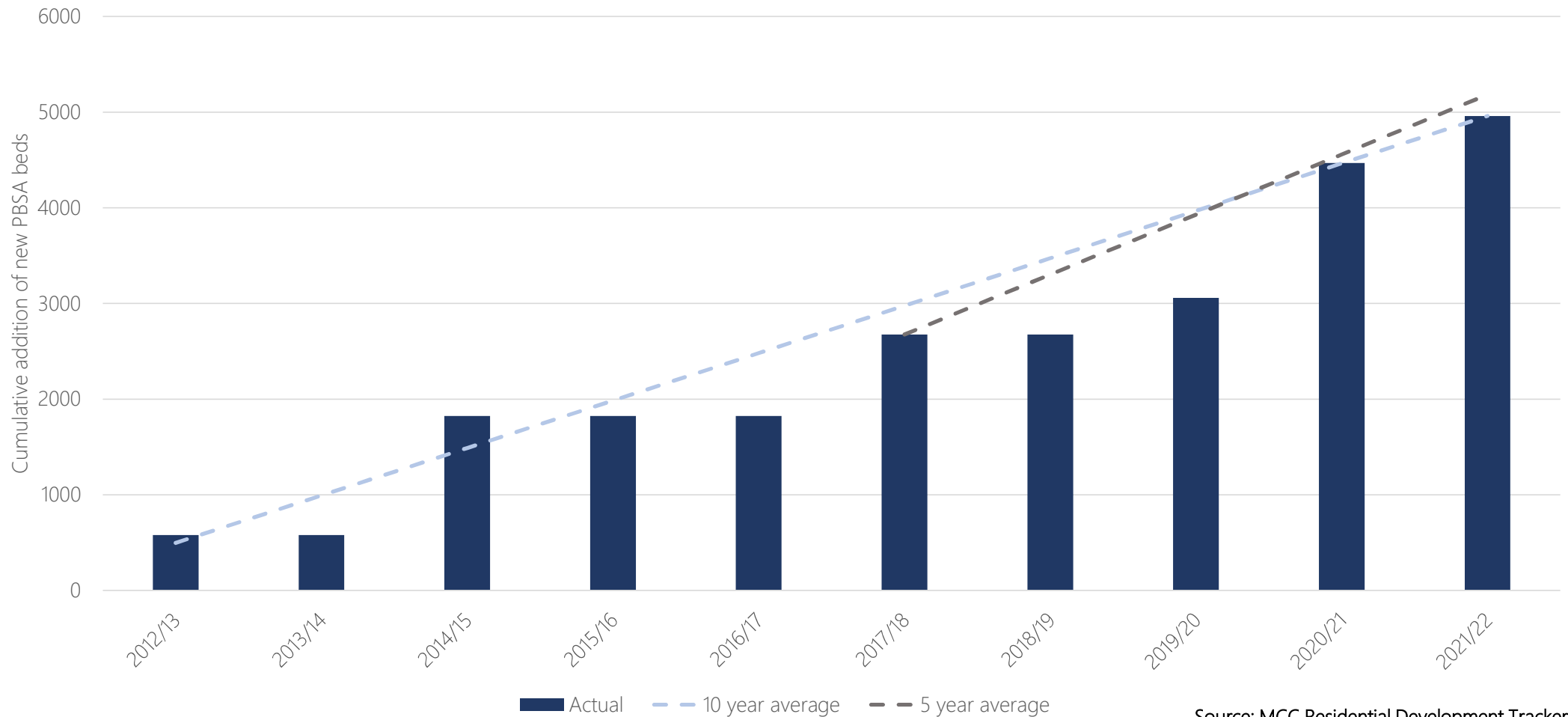
* Top 5 city centre buildings with most mainstream student exemptions (2019/20)

** Top 5 wards with the most mainstream student exemptions

Source: Fusion rents provided by the appellant / Rightmove data

Appendix 5 – Delivery of new PBSA beds in the city centre and Hulme 2012/13 to 2021/22

4,959 beds delivered over the last 10 years – equating to 495.9 p.a. (with the rate of delivery rising to 627 p.a. over the last 5 years)

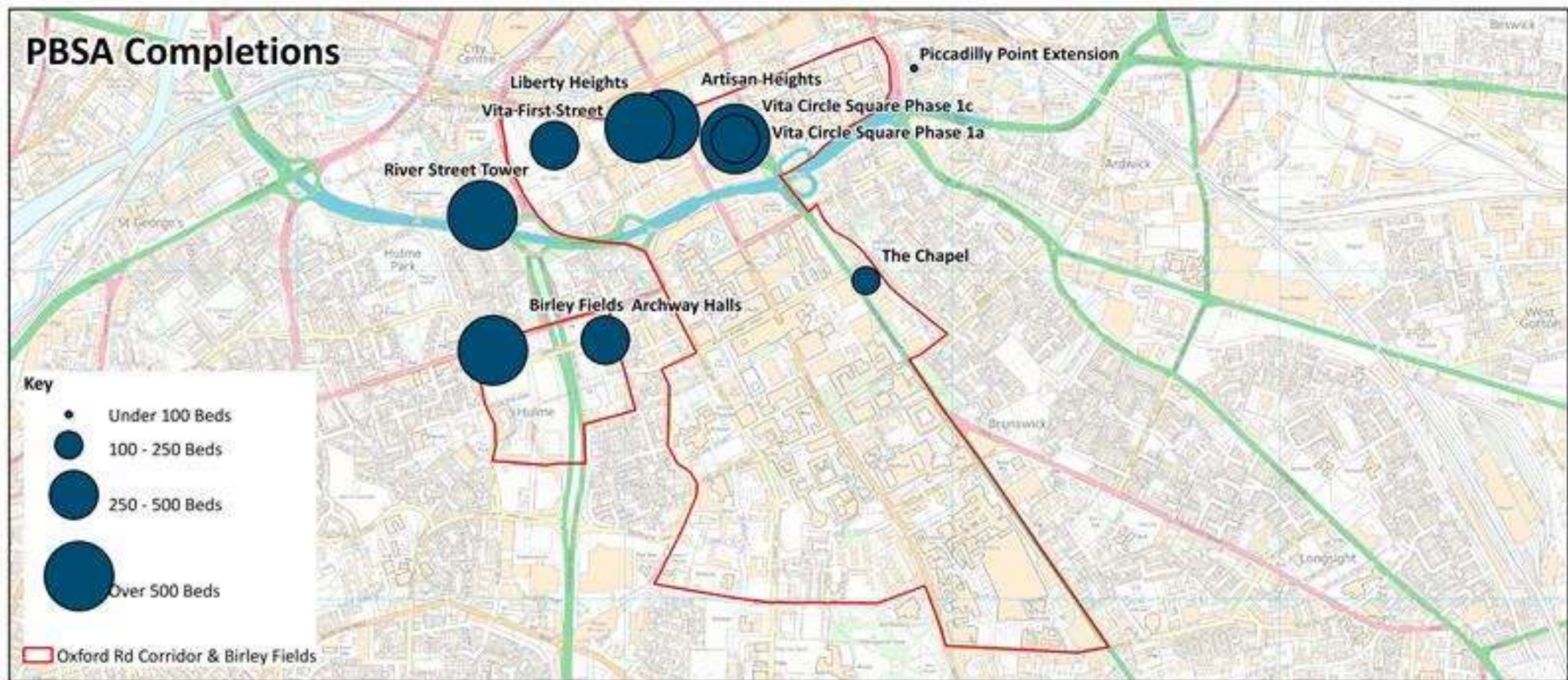


Source: MCC Residential Development Tracker

Appendix 6 – Completed PBSA developments (2012/13 to 2021/22)

PBSA Scheme	Location*	Operator	Completed	Total Beds
Liberty Heights	Oxford Road North	Unite	2012/13	520
Piccadilly Point Extension	Piccadilly Basin	Unite	2012/13	58
Birley Fields	Hulme Park & Birley Fields	MMU	2014/15	967
Vita First Street	Owen Street & First Street	Select	2014/15	279
Vita Circle Square Phase 1a	Oxford Road North	Select	2017/18	748
The Chapel	Oxford Road South	Hello Student	2017/18	102
Vita Circle Square Phase 1c	Oxford Road North	Select	2019/20	384
Artisan Heights	Oxford Road North	Unite	2020/21	603
River Street Tower	Owen Street & First Street	Downing	2020/21	807
Archway Halls	Hulme Park & Birley Fields	MMU	2021/22	491
*see Appendix 12			Total	4,959

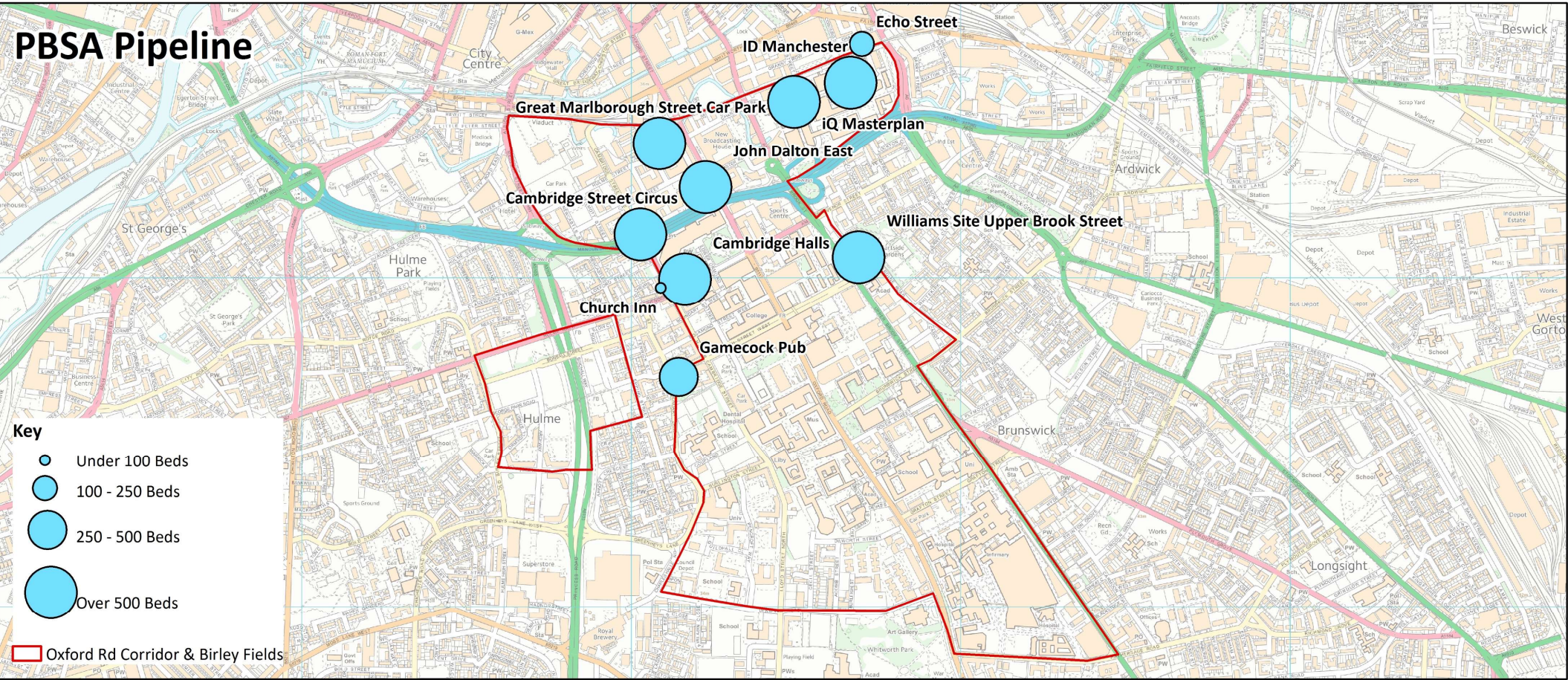
Appendix 7 – Map of Completed PBSA developments (2012/13 to 2021/22)



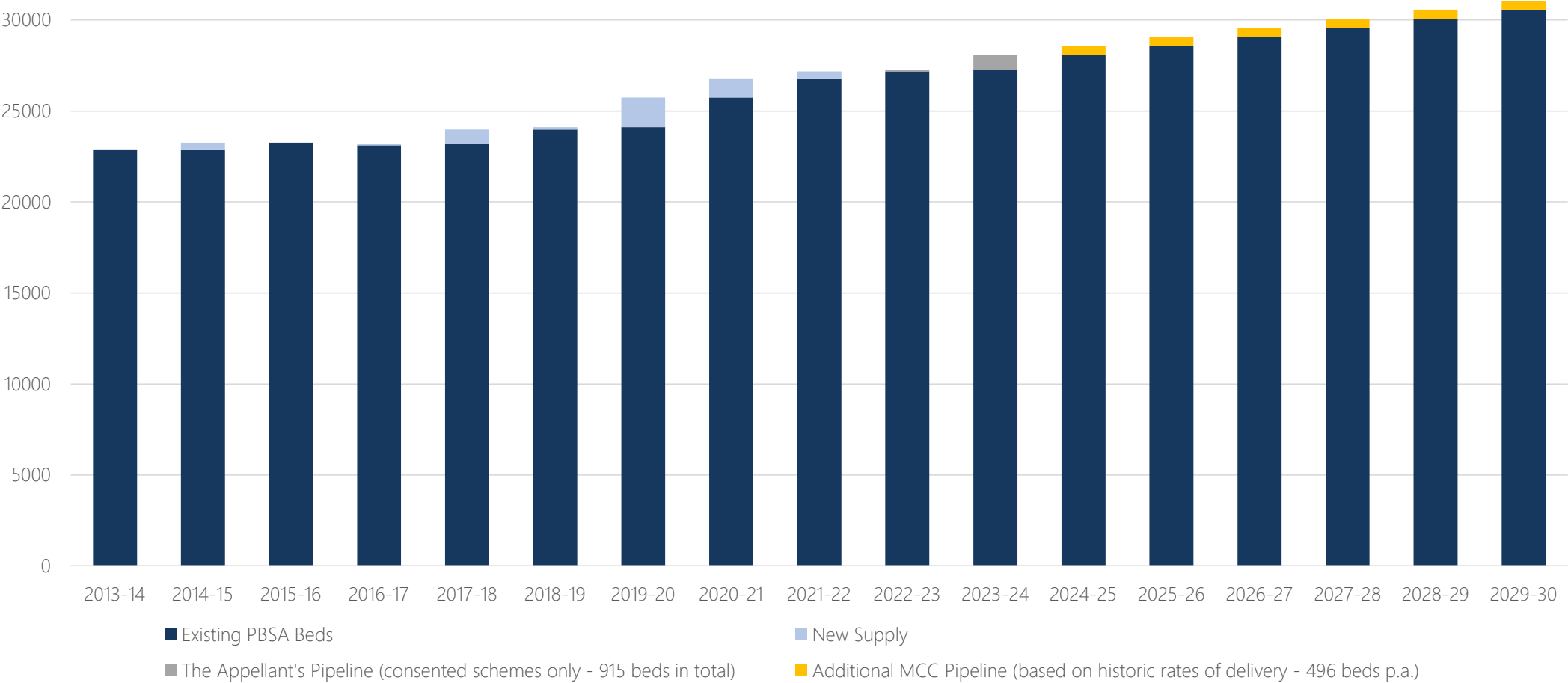
Appendix 8 – Sites identified by MCC for the development of PBSA

PBSA Scheme	Location*	Operator	Status	Total New Beds
Echo Street	Oxford Road North	IQ	On-site / Stalled	242
Church Inn	Oxford Road South	Alumno	On-site	62
Great Marlborough Street Car Park	Oxford Road North	GMS (Parking)	Planning Approved	853
Gamecock Pub	Hulme Park & Birley Fields	Curlew	Planning Submitted	260
iQ Masterplan	Oxford Road North	iQ	Part of a Regeneration Framework agreed in principle	1,123
Cambridge Street Circus	Oxford Road North	Urban Splash	Pre-planning (on MCC Land)	740
Cambridge Halls	Oxford Road South	MMU	Proposed redevelopment of existing Halls of Residence	830
John Dalton East	Oxford Road North	MMU	Proposed mixed use redevelopment of existing faculty building	500
ID Manchester	Oxford Road North	TBC	Part of an approved Regeneration Framework (on land in University ownership)	1,000
Williams Site Upper Brook Street	Oxford Road South	TBC	Part of an approved Regeneration Framework (on land in University ownership)	1,000
*see Appendix 12				Total
				6,610

Appendix 9 – Map of sites identified by MCC for the development of PBSA

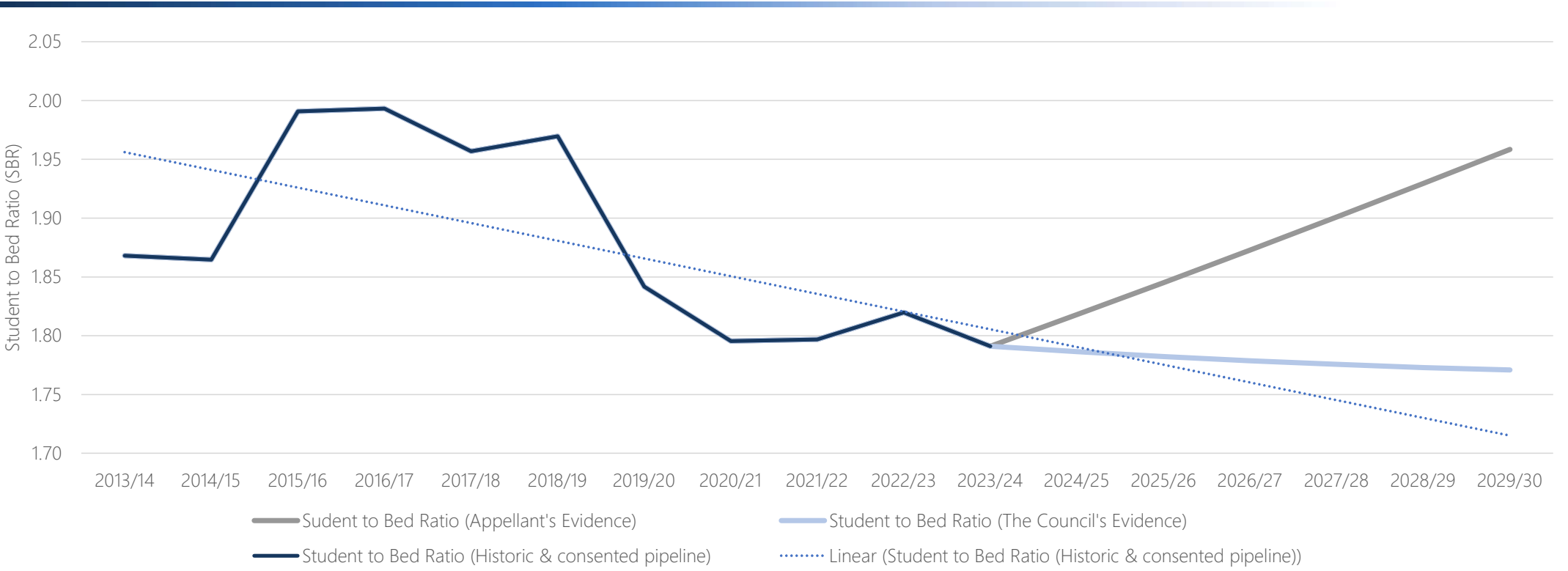


Appendix 10 – Manchester PBSA beds and pipeline



Appendix 11 – Future demand met by expected pipeline

Assuming a 1.5% growth in the student demand pool, delivery of PBSA beds at a level commensurate with historic supply is sufficient to meet and exceed demand leading to a reduced SBR of 1.77 by 2029/30 compared to 2020/21 levels (1.8)



	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Demand Pool (projected as per appellant's analysis post 2019/20)	42765	43365	46025	46200	46915	47495	47405	48115	48835	49570	50315	51070	51835	52615	53405	54205	55020
Number of beds (915 beds only post 2021/22)	22893	23256	23119	23180	23975	24113	25740	26800	27178	27240	28093	28093	28093	28093	28093	28093	28093
Number of beds (10 year average post 2023/24)	22893	23256	23119	23180	23975	24113	25740	26800	27178	27240	28093	28589	29085	29581	30077	30573	31069
SBR (Appellant's Evidence - based on 915 beds only)	1.87	1.86	1.99	1.99	1.96	1.97	1.84	1.80	1.80	1.82	1.79	1.82	1.85	1.87	1.90	1.93	1.96
SBR (The Council's Evidence - based on 10 year average)	1.87	1.86	1.99	1.99	1.96	1.97	1.84	1.80	1.80	1.82	1.79	1.79	1.78	1.78	1.78	1.77	1.77

Appendix 12 – Manchester City Centre Neighbourhoods

