

STUDENT NEED

Proof of Evidence

*David Feeney, Partner, Student
Accommodation Advisory,
Cushman & Wakefield*

*129406/FO/2021 – Land at
Deansgate South, Manchester*

FEBRUARY 2022

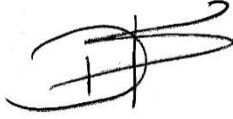
Experience

1. My name is David Feeney, Partner at Cushman & Wakefield. I have over ten years' experience as a student accommodation analyst, and lead Cushman & Wakefield's Student Accommodation Advisory services in the UK. I advise universities, private sector developers, local authorities, funds, rating agencies and investors on the suitability of purpose-built student accommodation (PBSA) in relation to demand, supply, location, specification and rent levels. I lead a team of five analysts that solely advise on student accommodation demand and supply conditions (and maintain the UK's most comprehensive record of PBSA supply).
2. In 2019 I acted as demand and supply advisor to iQ on the sale of the portfolio to Blackstone, the largest real estate transaction in UK history. I also advise Unite Students, the UK's largest provider of PBSA. I have provided demand due diligence assessments and demand pool calculations used to support the funding of long-term on-campus student accommodation partnership arrangements at universities across the UK totalling over 30,000 bed spaces at universities including Durham University, the University of London, the University of York and the University of Exeter. Reliance is placed on the accuracy of these demand pool calculations by banks and rating agencies to finance private-university partnerships of 40+ years. I have also advised a number of local authorities across the UK on student accommodation market conditions to inform Local Plan documents.
3. I regularly speak on national trends at conferences across the UK and produce Cushman & Wakefield's Student Accommodation Annual Report.¹ I have appeared on television and radio discussing the issues of demand for student accommodation, as well as in a variety of national newspapers and publications. I sit on the advisory panel for the National Union of Students' Accommodation Costs Survey and judge at the national Student Accommodation Awards. All my analysis draws on our methodologies honed over the last decade and which are trusted by the sector's major providers and institutions.
4. Myself and my team are based in Manchester and have previously advised Manchester Metropolitan University and Manchester City Council on accommodation strategy and accommodation quality respectively. I have also provided advice on the Manchester market to a wide range of private sector developers, operators and funders.
5. Cushman & Wakefield is a global property business that provides industry leading, end-to-end solutions for public and private sector clients. Our client base ranges from multinational corporates through to local authorities and universities. My Student Accommodation Advisory team is a national practice group with a long heritage of advising universities, property developers and funders in the student accommodation sector, providing robust and empirically based market assessments to inform development and decision making.
6. The core areas of my expertise relevant to this planning appeal include:
 - Student residential demand and supply analysis
 - Demand pool calculations and analysis for student accommodation
 - Purpose-built student accommodation quality and specification analysis

¹ <https://www.cushmanwakefield.com/en/united-kingdom/insights/uk-student-accommodation-report>

- Higher education policy and university strategic trends
- Extensive knowledge of the Manchester market

7. The evidence that I have prepared and provided for this appeal is true and I confirm that the opinions expressed are my true and professional opinions.

Signed:	
Name:	David Feeney
Position:	Partner
Date:	28 February 2022

8. In this Proof of Evidence I respond to Manchester City Council's refusal of planning permission on the grounds that the "applicant has failed to demonstrate that there is unmet need for the proposed student accommodation".² In particular, I respond to the Council's Statement of Case (CD-C4) points on need³:

- The Council will demonstrate that the increase in student numbers from 2013/14 reported by the appellant should be considered predominately as a recovery in the student population (following a drop off in enrolments as a result of the undergraduate fees hike in 2012) - and should not be interpreted as growth. More recently (from 2016/17 to 2019/20) total enrolments at both Universities have remained broadly stable.
- The Council will demonstrate that student population projections from both Manchester Universities do not support the scale of future growth in the demand pool for student accommodation asserted by the appellant (+1.5% a year).
- Thirdly, the Council will contend that the demand pool is smaller than anticipated in the appellant's application. The Council will provide supporting evidence relating to existing residential preferences in the student housing market in the city; the softening impact of the Covid-19 pandemic on the student population and the effect of new forms of "hybrid learning" (including elements of remote learning) on student demand for accommodation.
- Finally, the Council will show that the evidence provided by the appellant relating to Manchester's Purpose Built Student Accommodation (PBSA) pipeline significantly underplays the true scale of development expected to be built in the period up to 2029/30.

9. My evidence will show that full-time student numbers in Manchester are growing and that the demand pool for accommodation bed spaces is rising as the City's universities recruit more students from outside the area (particularly international students). Contrary to the City Council's assertion that the modelling of 1.5% growth in the demand pool (i.e. the number of students requiring a bed

² https://pa.manchester.gov.uk/online-applications/files/895B8BB1199C10D848A178D784A1FB18/pdf/129406_FO_2021-DECISION_NOTICE-1691793.pdf

³ Sections 7.4, 7.4.1, 7.4.2, 7.4.3, 7.4.4, 7.4.5

space whilst studying) per annum to 2029/30 was too high, I will present evidence that shows in the period since the Evidence of Student Need Report (CD-A12) was delivered, student number growth has been far higher than that modelled. Further, the evidence will show that the Manchester market already operates from a position of undersupply, with large numbers of students unable to access a PBSA bed space.

10. I will show that the demand pool for accommodation is growing, and that from a position where well over 20,000 students are already unable to access a PBSA bed, this figure is set to grow – even under the most conservatively modelled scenarios.
11. I will also show that there is a need for more high quality accommodation in Manchester to allow students to access products that enhance the student experience; and that evidence and recruitment numbers for 2020/21 show the strong desire from students to be on-campus experiencing a face-to-face learning experience that supports their learning and mental health outcomes. The proposed Fusion Manchester DevCo development aligns with the need for higher quality stock, with Fusion Students having a strong reputation in the sector for delivering high quality, modern PBSA.
12. This Proof updates the evidence provided in Cushman & Wakefield's Evidence of Student Need Report (2020) (CD-A12) and Summary Update Report (2021) (CD-C32). My evidence draws on data from the Higher Education Statistics Agency (HESA)⁴, which is the central source for the collection and dissemination of statistics about publicly funded UK higher education; and the Universities and Colleges Admissions Service (UCAS)⁵ which collates data on undergraduate applications and acceptances to higher education. Both are members of the Code of Practice for Statistics. My analysis also draws on Cushman & Wakefield's Student Accommodation Tracker, the sector's most comprehensive database of 700,000 PBSA beds in the UK. The Tracker has been running since 2013/14 and forms the basis of all Cushman & Wakefield's supply side analysis, as well as being used in our Annual Report on the sector for a number of years.⁶ As is standard in the student accommodation sector, my analysis will focus on the full-time student population⁷, with fewer than 2% of all part time students needing or choosing to live in purpose-built stock in 2019/20.⁸ An up to date supply and development pipeline breakdown for Manchester is also provided.

Evidence

13. The first part of this Proof responds to the Council's Statement of Case (CD-C4) on need, namely (7.4.1) *the Council will demonstrate that the increase in student numbers from 2013/14 reported by the appellant should be considered predominately as a recovery in the student population (following*

⁴ <https://www.hesa.ac.uk/about>

⁵ <https://www.ucas.com/>

⁶ <https://www.cushmanwakefield.com/en/united-kingdom/insights/uk-student-accommodation-report>

⁷ Full-time includes students recorded as studying full-time, normally required to attend a HE provider for periods amounting to at least 24 weeks within the year of study, plus those enrolled on a sandwich course (thick or thin), irrespective of whether or not they are in attendance at the HE provider or engaged in industrial training, and those on a study-related year out of their HE provider. During that time students are normally expected to undertake periods of study, tuition or work experience which amount to an average of at least 21 hours per week for a minimum of 24 weeks study/placement.

⁸ HESA 2019/20

a drop off in enrolments as a result of the undergraduate fees hike in 2012) - and should not be interpreted as growth. More recently (from 2016/17 to 2019/20) total enrolments at both Universities have remained broadly stable.

Student Number Growth

14. Manchester is the UK's third largest Higher Education location by number of full-time students after London and Birmingham. The City Council notes that "Manchester is in the top tier for higher education internationally"⁹ and has ambitions to be a "world class education hub".¹⁰ The University of Manchester is the largest institution in the UK¹¹ in terms of full-time students, with Manchester Metropolitan University the 11th largest.
15. The analysis below will show that, contrary to the City Council's assertion that student numbers to 2019/20 have been a recovery of the position pre-2012/13, the full-time student population (i.e. the cohort with a need for student accommodation) has grown strongly and crucially, the profile of demand in Manchester has changed; with a large increase in international students over this period increasing the demand pool for bed spaces.
16. The table below shows student number change at Manchester institutions over time.

Table 1: Student Number Growth in Manchester 2011/12 to 2020/21

	2011/12	2012/13	2019/20	2020/21	Growth 2012/13 - 2020/21	Growth 2011/12 - 2020/21
Full-time & part-time	77,220	73,350	74,795	81,470	11%	6%
Full-time	64,100	61,035	66,160	71,380	17%	11%

Source: HESA 2011/12 to 2020/21

17. As can be seen from the table, full-time student number growth over this period has been significant at 11% between 2011/12 and 2020/21 (7,280 students) and (10,345 students) between 2012/13 and 2020/21. Crucially, the demography of the student body has also changed over this period, with a growing international student body increasing the demand for quality PBSA bed spaces. This is examined below.
18. The table below shows the changing profile of demographic groups in Manchester over time.

Table 2: Student Number Growth in Manchester 2011/12 to 2020/21

	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2016/17 - 2020/21	2019/20 - 2020/21	2012/13 - 2020/21
Total Non UK	13,275	12,955	13,545	14,140	15,100	15,735	16,160	16,960	17,965	20,200	28%	12%	7,245
Total	64,100	61,035	61,535	61,535	64,450	65,880	65,545	65,430	66,160	71,380	8%	8%	10,345

Source: HESA 2011/12 to 2020/21

19. As can be seen from the table, since changes to the tuition fee system in 2012/13, students studying in Manchester from outside the UK have increased by 28%, with accelerating growth evident as numbers increased by 2,235 in a single year between 2019/20 and 2020/21. Total non-UK growth

⁹ https://secure.manchester.gov.uk/info/200024/consultations_and_surveys/7002/manchester_strategy_a_highly_skilled_city

¹⁰ <https://democracy.manchester.gov.uk/documents/s20052/Purpose%20Built%20Student%20Accommodation.pdf>

¹¹ Full-time students

over the period 2012/13 to 2020/21 equates to 7,245 students, with this cohort accounting for 70% of all full-time student number growth over this period.

20. Emerging evidence for 2021/22 entry from UCAS indicates that overall student numbers in Manchester for this academic year will be even higher than those seen in 2021/22. The following table shows UCAS applications and acceptances at the University of Manchester and Manchester Metropolitan University over time.¹²

Table 3: UCAS Applications to University of Manchester & Manchester Metropolitan University

	2016	2017	2018	2019	2020	2021	Change 2020- 2021
Acceptances	15,375	15,005	14,875	15,210	16,855	20,250	20%
Applications	119,925	117,285	114,935	121,340	128,195	143,560	12%

Source: UCAS 2016-2021

21. As can be seen from the table, acceptances through the UCAS system for 2021/22 entry are 20% higher than in 2020/21 which is indicative of another large increase in student numbers in Manchester. This 20% increase is double the 10% increase in acceptances seen between 2016 and 2020.
22. There is, therefore, clear evidence of growth in student numbers in Manchester over time, particularly from cohorts most likely to demand a bed space, i.e. students studying away from home at university and not living in the parental/guardian home or their own residence. Further, as outlined later in this Proof, the student population continued to grow at a time of decline in the UK 18-year-old population between 2016 and 2020.
23. Of course, the number of full-time students is not an assessment of demand in itself; this cohort only forms the basis for those who may require a bed whilst studying. To assess demand for accommodation, the calculation of a demand pool is required. My work in this area is outlined in the following section of this Proof.
24. In its Statement of Case (CD-C4), the Council notes that *it will contend that the demand pool is smaller than anticipated in the appellant's application. The Council will provide supporting evidence relating to existing residential preferences in the student housing market in the city; the softening impact of the Covid-19 pandemic on the student population and the effect of new forms of "hybrid learning" (including elements of remote learning) on student demand for accommodation.* The analysis below shows the scale of the demand pool in comparison with other major UK markets and examines evidence relating to the impact of COVID-19 on the sector and student appetite for remote learning.

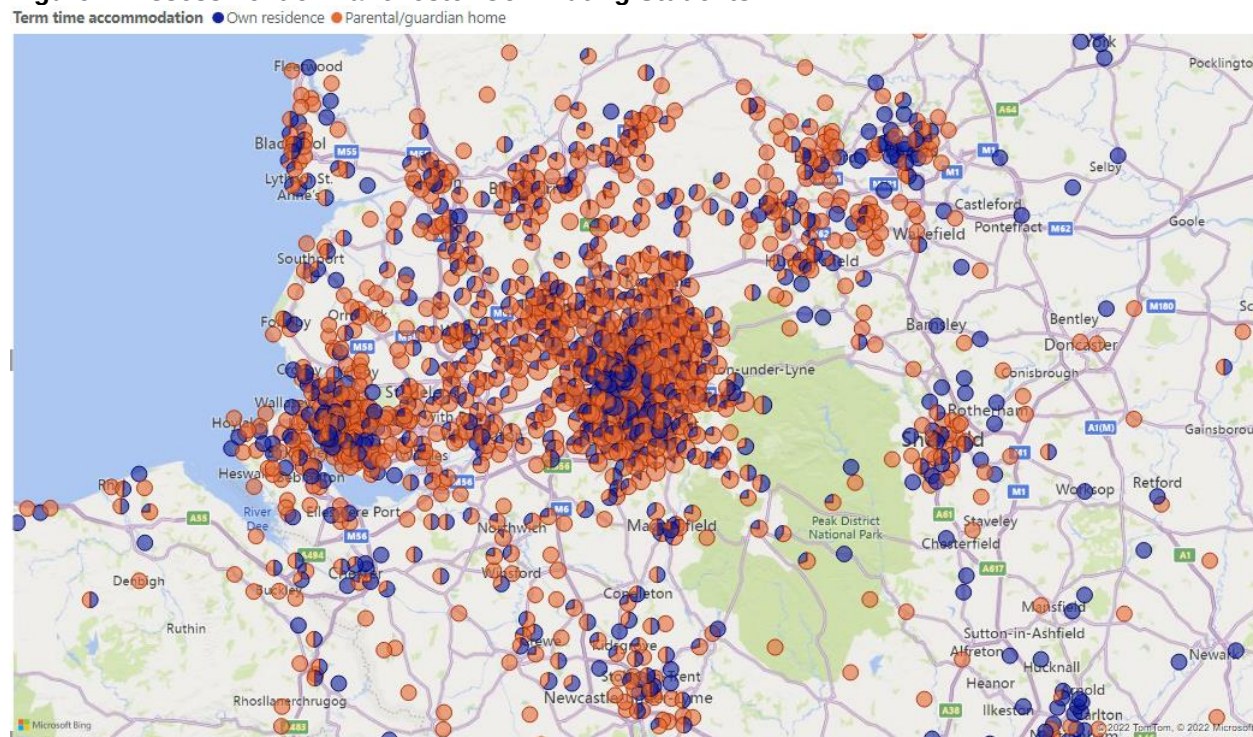
The Demand Pool for Accommodation

25. Core to Cushman & Wakefield's work across the UK is interpreting the demand for accommodation bed spaces. Key to this is the calculation of a demand pool – i.e. the number of students requiring

¹² Note that Royal Northern College of Music students do not apply directly through UCAS, with students using the Conservatoire system. Therefore, application data for RNCM is unavailable.

a bed space away from home when studying at university. Over the last 15 years, Cushman & Wakefield has developed a proprietary methodology for calculating demand pools which is trusted and used by universities, developers, operators and local authorities across the UK¹³¹⁴¹⁵. The demand pool calculation examines students by demographic grouping (domicile, region, county, local authority area) and the HESA term-time accommodation field and removes students unlikely to demand a bed space – i.e. those that live within a commutable distance at the parental home or in their own residence whilst at university, as well as those on a sandwich year¹⁶. All data is cross-checked and mapped to ensure accuracy. Elements of the analysis can be seen below.

Figure 1: Assessment of Manchester Commuting Students



Source: HESA 2019/20/Cushman & Wakefield

26. Cushman & Wakefield's Evidence of Student Need Report of December 2020 (CD-A12) recorded a demand pool for Manchester of 47,495 students in 2018/19 – i.e. 73% of students require a bed space whilst at university. This means that 20,963 students were unable to access a PBSA bed space at the time.
27. The City Council argues in its Statement of Case (CD-C4) that the Manchester demand pool figure is lower than that calculated in our Report, yet in relation to approved application 121252/FO/2018 at Great Marlborough Street, the applicant's Market Context Report (September 2018)¹⁷ notes that

¹³ https://www.preston.gov.uk/media/1846/Student-Accommodation-Demand-and-Supply-Study/pdf/Student_Accommodation_Demand_and_Supply_Study_-_Aug_2019_-_FINAL.pdf?m=637012101352130000&ccp=true#cookie-consent-prompt

¹⁴ https://www.sheffield.ac.uk/polopoly_fs/1.881824!/file/acc.pdf

¹⁵ https://images.reading.gov.uk/2020/01/EP017_University_of_Reading_Response_to_Issue_7.pdf

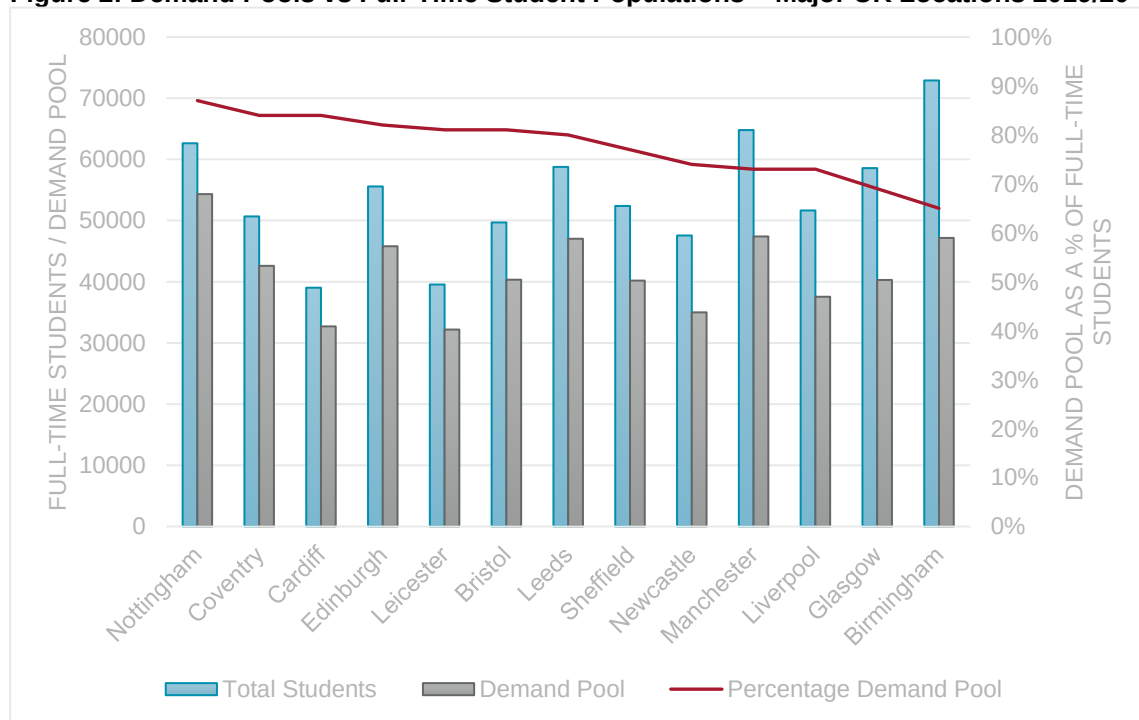
¹⁶ Sandwich placement where an industrial (or other) placement causes a continuous absence from full-time study of at least one academic year (HESA)

¹⁷ https://pa.manchester.gov.uk/online-applications/files/CA92AB628BDCBA9ABD27213E9165651A/pdf/121252_FO_2018-MARKET_REPORT-983773.pdf

“There is a residual population of 24,850 students who do not have the choice of PBSA due to a lack of supply”. This figure is 1,468 higher than the figure in Cushman & Wakefield’s Evidence of Need Report¹⁸. The Market Context Report contains little analysis relating to student accommodation demand.

28. As part of the application, Manchester Metropolitan University noted that “demand for UK universities has been reported to have increased in 2020 by 3.5% from the same time last year. The EKOSGEN analysis also indicates that in the medium term, student numbers are anticipated to return to pre-Covid levels, particularly in those cities and towns with high demand courses and departments. Manchester is one of the UK’s strongest academic and student cities, particularly with international students. It is likely that the recent trajectory, particularly with regard to postgraduates, is likely to be established by the 20121/22 academic year. Considering the projected delivery period for this project, the proposals will be well placed to meet the demonstrable need for student accommodation”.¹⁹
29. The data below places the Manchester demand pool (as at 2019/20) in a national context by comparing it to the pools of a number of comparable major UK market locations.

Figure 2: Demand Pools vs Full-Time Student Populations – Major UK Locations 2019/20



Source: HESA 2019/20/Cushman & Wakefield

30. As can be seen from the chart above, the demand pool calculated for Manchester is not unusual in the context of major UK markets. In fact, at 73% of the full-time student population, it is ranked 10th

¹⁸ Page 62 – 2018/19 demand pool vs 2018/19 bed supply

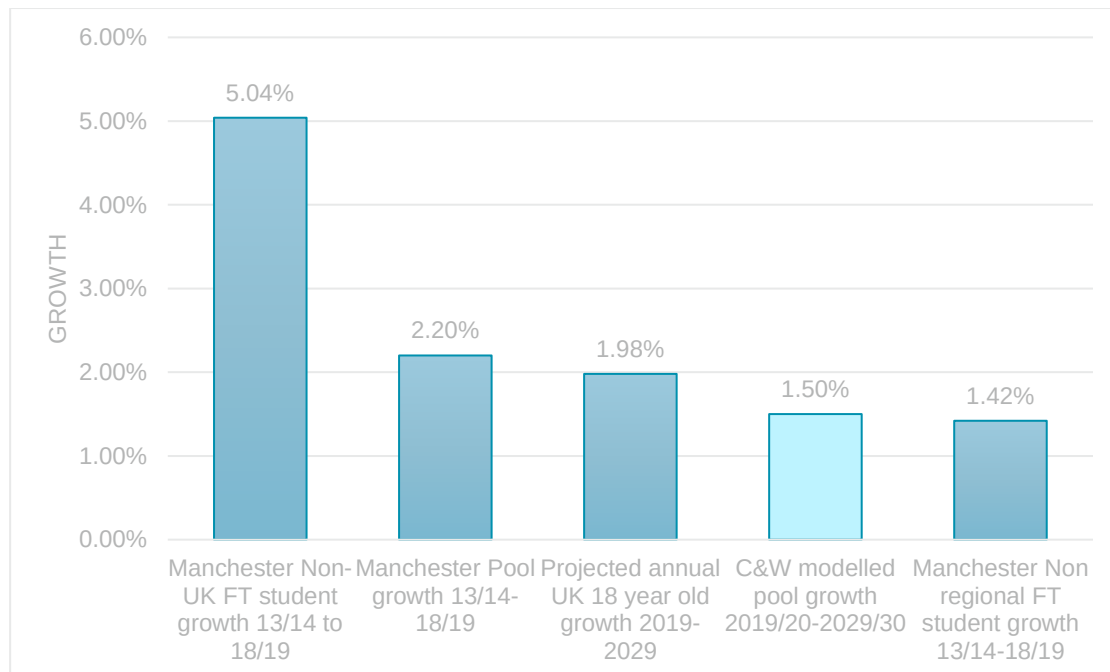
¹⁹ https://pa.manchester.gov.uk/online-applications/files/3F2975B0C9D48EB6A740287990DC9EED/pdf/121252_FO_2018-SUMMARY_OF_CONSULTATION_RESPONSES-1194982.pdf

of the 13 major locations examined. The demand pool vs supply and the Manchester student to bed ratio is explored later in this Proof of Evidence.

Projected Student Number Growth

31. The City Council states that it *will demonstrate that student population projections from both Manchester Universities do not support the scale of future growth in the demand pool for student accommodation asserted by the appellant (+1.5% a year).*
32. The 1.5% figure used by Cushman & Wakefield in its 2020 Evidence of Student Need Report (CD-A12) was purposely modelled conservatively and is lower than the 2.2% growth in the demand pool recorded in the period between 2013/14 and 2018/19. The evidence below will show that in light of updated student numbers for 2019/20 and 2020/21, the forecast can be considered conservative when measured against growth in other metrics over the same period, and extremely conservative when compared with student number growth since 2018/19.
33. This 1.5% figure is placed in context below against the following metrics:
 - Annual average Demand pool growth 2013/14 to 2018/19
 - Annual average growth in Manchester full-time students from outside the North West 2013/14 to 2018/19
 - Annual average growth in Manchester full-time students from outside the UK 2013/14 to 2018/19
 - Annual average projected growth in the UK 18-year old population 2019-2029 (i.e. the period modelled in the Need Report)

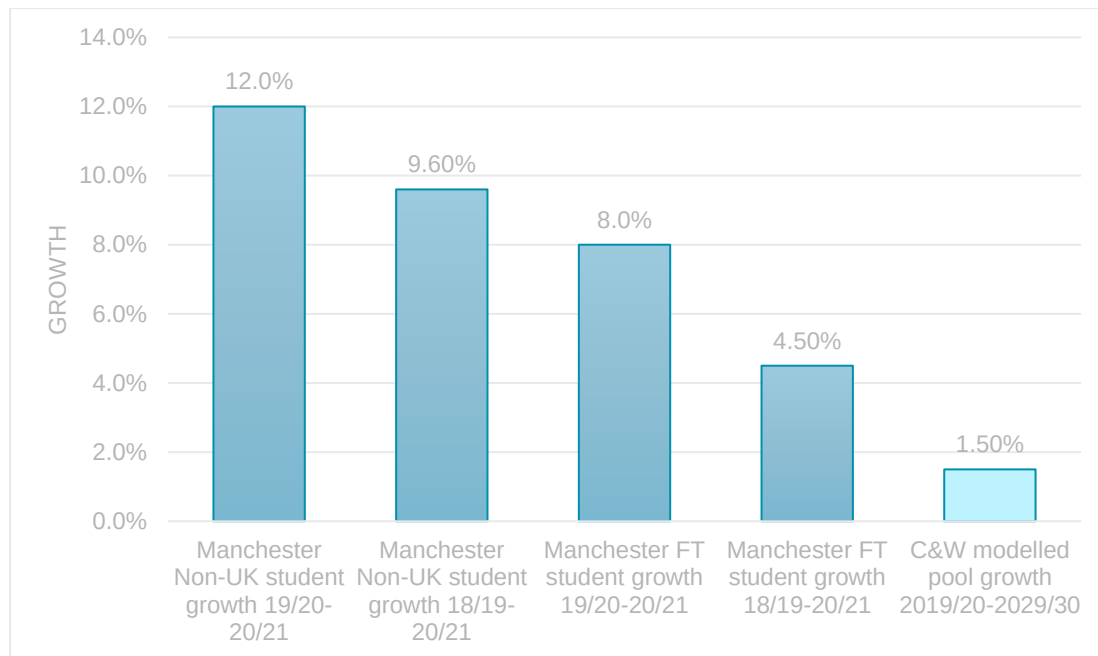
Figure 3: C&W Forecast Demand Pool Growth vs Other Growth Metrics – annual averages over respective time periods



Source: HESA/ONS/Cushman & Wakefield

34. As can be seen from the chart, our projected demand pool growth can be considered conservative in comparison with other growth over the same period and population projections between 2019 and 2029. Further, the pool growth can be considered extremely conservative when considering what has happened in terms of full-time student numbers since the production of the Need Report. This is explored below.
35. As outlined earlier in this Proof, full-time student number growth in Manchester has been significant between 2018/19 and 2020/21 and particularly between 2019/20 and 2020/21. The 1.5% growth previously forecast by Cushman & Wakefield compares to two year growth in the period since (2018/19 to 2020/21) of full-time students of 4.5% and growth in the non-UK population over the same period of 9.6%. Over the one year period between 2019/20 and 2020/21 the rate of growth is even higher at 8% for all full-time students and 12% for those from outside the UK.
36. The rate of full-time student number growth in the single year between 2019/20 and 2020/21 is over five times higher than the 1.5% conservatively forecast in the Need Report at the time. This can be seen below.

Figure 4: C&W Forecast Demand Pool Growth vs Actual Growth 2018/19-2020/21 – annual averages over respective time periods



Source: HESA/Cushman & Wakefield

37. Therefore, rather than the City Council's assertion that projections are too high, it can be seen that the Need Report projections were extremely conservative. Further, given the evidence of UCAS acceptance growth of 20% for 2021/22 entry outlined earlier in this proof (Table 3), it is likely that student numbers in 2021/22 are significantly higher than those in 2020/21 and far higher than the conservative 1.5% growth in demand modelled in the Need Report.

COVID-19 and Impacts on Demand

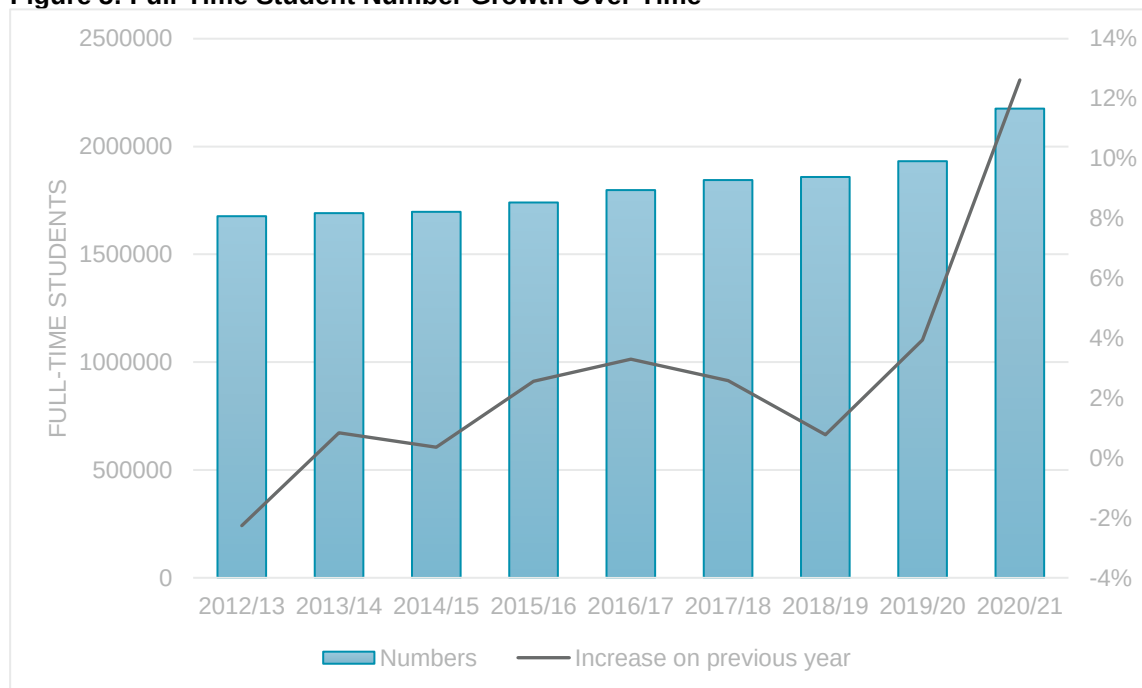
38. The Council's Statement of Case (CD-C4) contends *the softening impact of the Covid-19 pandemic on the student population and the effect of new forms of "hybrid learning" (including elements of remote learning) on student demand for accommodation*. In fact, there is no evidence that the COVID-19 pandemic has impacted the full-time student population, with numbers continuing to rise significant and a return to, and appetite for, in-person teaching, as outlined below.
39. The UK Government states in its January 2022 Operational Guidance for Higher Education²⁰ that "providers should note that there are no COVID restrictions that apply to Higher Education and they should ensure that they deliver face-to-face teaching without restrictions".
40. Following the COVID-19 pandemic, student numbers have continued to grow, rising by 13% nationally between 2019/20 and 2020/21, reinforcing the findings of Unite Students' survey which showed 89% of students were keen to get back to campus as soon as it was safe to do so and 79% reporting that living in accommodation and being on campus was as an important part of their experience as tutorials.²¹

²⁰

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1048605/180122_Higher_education_COVID-19_operational_guidance.pdf

²¹ <https://www.unite-group.co.uk/articles/supporting-the-return-to-university>

Figure 5: Full-Time Student Number Growth Over Time



Source: HESA 2012/13 to 2020/21

41. This 13% single year increase equates to the same percentage increase in students nationally as was seen between 2015/16 and 2019/20. The increase is more significant than the 6% increase seen in 2009/10 following The Great Recession. Applications for entry for the current academic year (2021/22) reached a new record level of 749,570, a 3% rise on 2020. As analysed above, this increase has been reflected in the Manchester full-time student population, with a 20% increase in undergraduate acceptances for 2021/22.
42. In line with other UK universities, the University of Manchester notes that “Students are studying a mixture of predominantly in-person, on-campus activities, lectures and classes, and newly recorded video content and other materials from lecturers”²² and that “All undergraduate and taught postgraduate students will return to on-campus study for Semester 2”. Manchester Metropolitan University notes its aim is “to offer our students a full, on-campus university experience from September 2021”²³ and in an environment where no restrictions are in place “all traditional forms of classroom-based learning will take place according to your timetable”. Of course, in-person learning will be aided by the UK Government’s plan to end all COVID-19 restrictions in February 2022.²⁴ There is, therefore no evidence that student demand for accommodation will be impacted over the long-term.
43. The conservative nature of Cushman & Wakefield’s demand pool modelling and the appetite for study at higher education level is placed in a national context below.

²² <https://www.manchester.ac.uk/coronavirus-applicants-update/teaching-learning/#:~:text=away%20from%20campus.-,We%20fully%20expect%20to%20continue%20teaching%20in%20person%20on%20campus,the%20government's%20COVID%2D19%20guidelines.&text=Otherwise%20you%20should%20return%20for,on%20Monday%2C%207%20February%202022.>

²³ <https://www.mmu.ac.uk/study/studying-in-september-2021>

²⁴ <https://www.bbc.co.uk/news/uk-60319947>

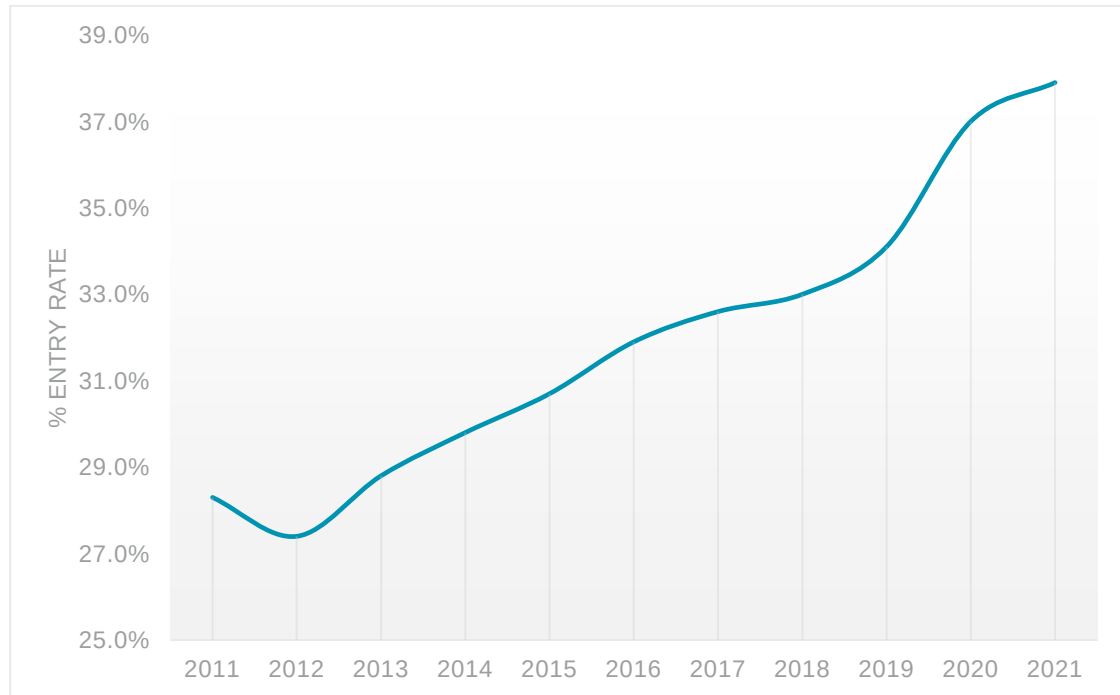
National Higher Education Context

44. The UK is a global leader in the provision and delivery of Higher Education. The country is home to four of the top 25 universities in the world and eight in the top 50, including the University of Manchester²⁵, and has a full-time student population of just under 2.2 million, of which 26% percent are international students. Full-time students have grown by 85% since the turn of the Century, with students from outside the EU rising by 368%.
45. As well as the rise in international students studying in the UK, the numbers of UK students studying outside their home region continues to grow as they seek out the best universities to enhance their education and career prospects. The percentage of students studying outside of their home region has grown by 77% (513,445 students) since the turn of the Century, increasing the demand for student accommodation bed spaces.
46. While the requirement for a degree qualification in most professional areas has always been high, increasingly other areas of employment have demanded the same status. The Higher Education Statistics Agency reports a graduate premium of 19% in comparison with non-graduates for those born in 1970, with the UK Government reporting that working age graduates in 2018 earned a median wage of £34,000 compared with £24,000 for non-graduates (a 42% premium).²⁶ These trends mean that the entry rate for undergraduate courses in the UK has grown significantly over time. In 2021/2022 academic year, 37.9% of 18-year-olds were accepted into a course of study compared to 28.3 percent who entered the system in 2011/12. These trends are extremely positive when combined with forecast growth in UK's 18-year-old population outlined below.

²⁵ https://www.timeshighereducation.com/world-university-rankings/2022/world-ranking#!/page/0/length/-1/sort_by/rank/sort_order/asc/cols/stats

²⁶ <https://www.gov.uk/government/news/graduates-continue-to-benefit-with-higher-earnings>

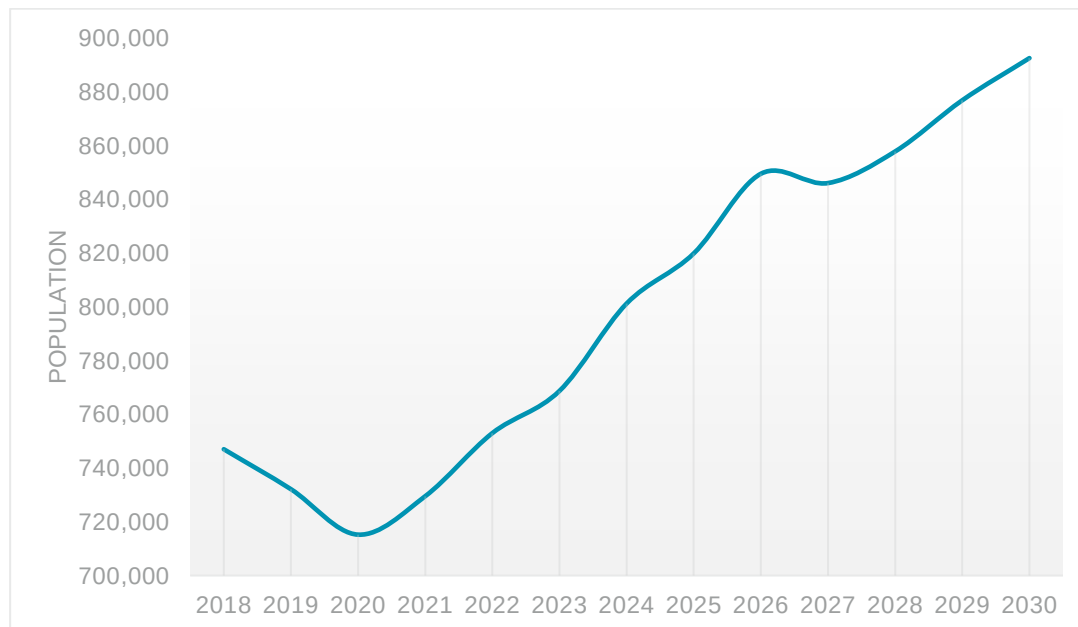
Figure 6: UK 18-Year-Old Entry Rate to Higher Education (%)



Source: UCAS 2012-2021. Academic Year – i.e. 2021 application cycle = entry for 2021/22 Academic Year

47. The UK entered into a demographic dip of its 18-year old population from 2018, with this cohort falling by 4.3% alone between 2018 and 2020 (the equivalent of nearly 32,000 people). The demographic dip in this population was particularly damaging to largely UK-recruiting institutions, which saw a natural fall in their number of potential recruits.
48. UK Higher Education is therefore well placed to benefit from an increased overall participation rate and the overall increase in the 18-year-old population that has been seen over the last year. In the UK, the 18-year old population is forecast to grow by 19.5% or 145,542 people between 2018 and 2030.

Figure 7: Projected UK 18-Year-Old Population 2018-2030

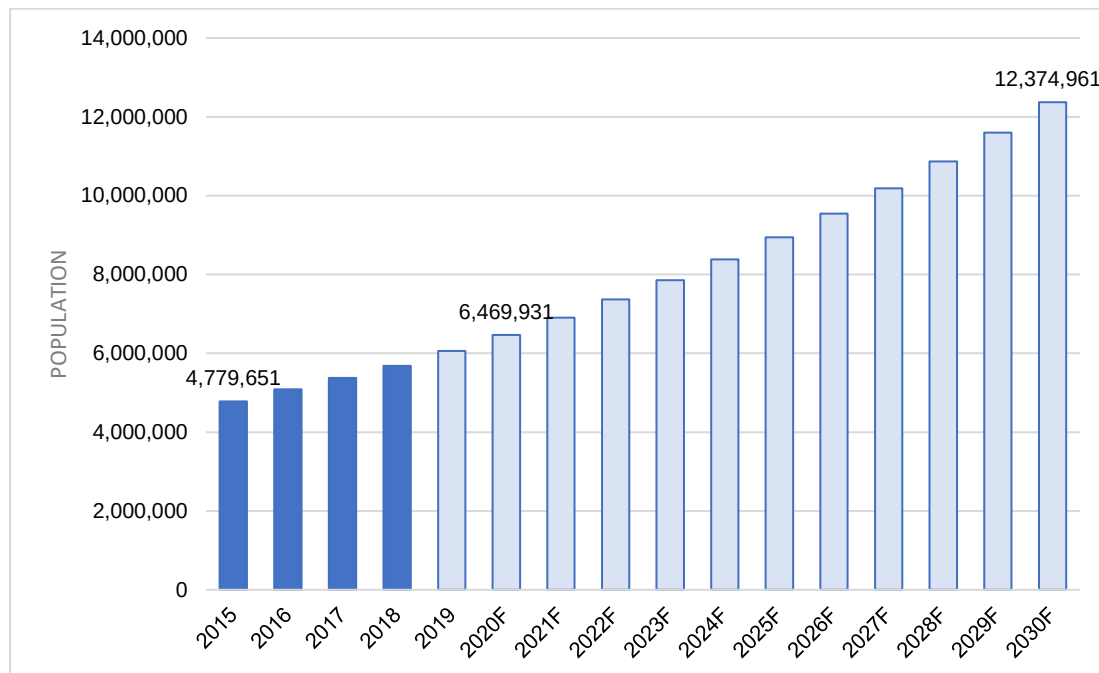


Source: Office for National Statistics 2021. Calendar Year.

49. When combining this population growth with a projected continued growth in international students, the Higher Education Policy Institute (HEPI) predicts that 358,000 extra places will be required at UK universities by 2035²⁷. If the male participation rate was to match the same level as females, this number would rise to 500,000. No formal national forecasts are available through the UK Government as to the expected Higher Education growth over time. However, in September 2020 the Department for Education forecast that the number of full-time undergraduates eligible for tuition fee loans was set to grow from 400,000 in 2018/19 to 442,000 in 2024/25. Given market movements since this date, this figure is likely to significantly underrepresent the true level of eligibility in 2024/25.
50. For international students looking to come to the UK, US, Canada, UK and Australia, the key attractions are:
 - **Ability to study in the English language** - one of the key attractions for students looking to study abroad is to improve their knowledge of English in order to enhance employment prospects in an increasingly globalised job market.
 - **Prestigious nature of the UK and U.S. higher education system** - as mentioned earlier, the UK and US make up nearly half of the global top 100 universities.
51. In 2019, at a global level there were over six million internationally mobile students (i.e. typically those holding a non-resident student visa to study at Higher Education level). The CAGR over the period 2015-2019 is approximately 6.7%.

²⁷ <https://www.hepi.ac.uk/2020/10/22/new-hepi-report-reveals-over-350000-more-higher-education-places-will-be-needed-in-england-by-2035-to-keep-up-with-demand-while-scotland-will-see-a-decline-in-demand-for-places-over-the-same-period/>

Figure 8: Historic & Modelled International Student Mobility



Source: UNESCO (2020 onwards are projections based on the trend seen between 2015 and 2019. Calendar Year.

52. If these trends were to continue to 2030 the number of internationally mobile students would grow to 12.4 million, a figure 158.9% higher than that seen in 2015 (modelled by Cushman & Wakefield in the chart above). Such a trend would be extremely positive in terms of demand for PBSA. With the City Council's ambition to be a "world class education hub"²⁸ and a City already home to 20,200 students from outside the UK, Manchester is well placed to benefit from this potential growth.

PBSA Supply and the Development Pipeline

53. In the City Council's Statement of Case, the Council notes that *it will show that the evidence provided by the appellant relating to Manchester's Purpose Built Student Accommodation (PBSA) pipeline significantly underplays the true scale of development expected to be built in the period up to 2029/30.*
54. As I understand it, the City Council defines PBSA as student accommodation units forming part of the sui generis use class.²⁹ This is in line with national definitions where PBSA is not assigned to a specific use class.³⁰ The first part of this Proof of Evidence has concentrated on demand and the scale of the demand pool for accommodation in Manchester. The second part of this Proof will concentrate on supply and respond to the Council's assertion that development pipeline analysis in the Evidence of Student Need Report (CD-A12) underplays the scale of planned development in the City.
55. Manchester is a large and mature PBSA market, with 27,178 beds available to students for the current 2021/22 academic year. The chart below shows the scale of new PBSA bed spaces delivery

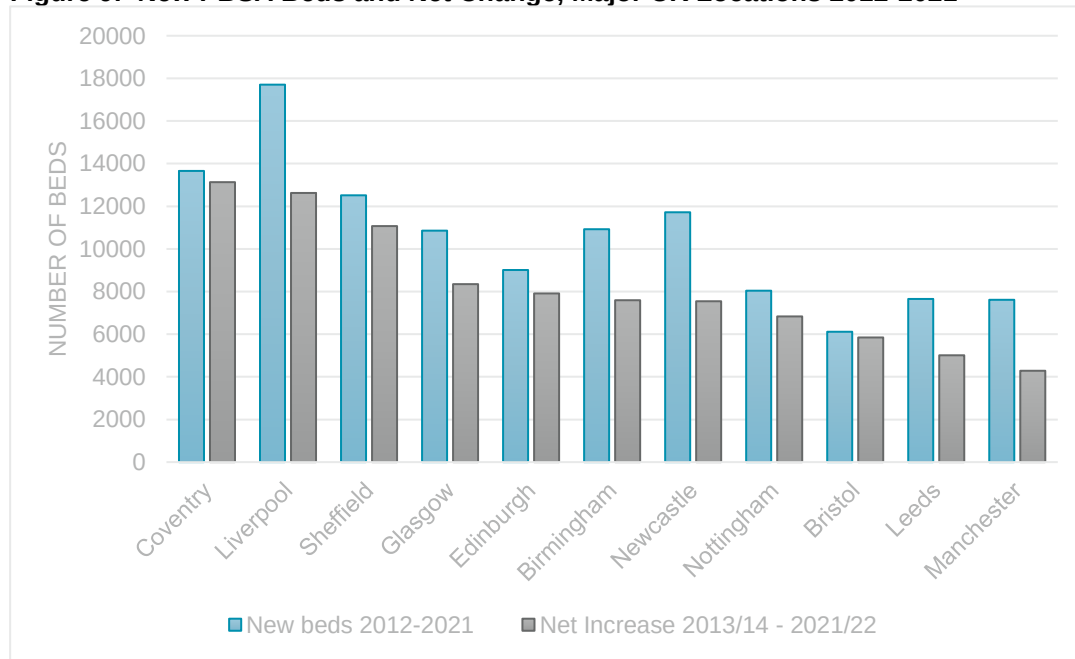
²⁸ <https://democracy.manchester.gov.uk/documents/s20052/Purpose%20Built%20Student%20Accommodation.pdf>

²⁹ <https://democracy.manchester.gov.uk/documents/s12248/Co-living.pdf>

³⁰ <https://www.hepi.ac.uk/wp-content/uploads/2020/08/HEPI-Student-Accommodation-Report-FINAL.pdf>

over time in Manchester (total and net excluding beds that have left the market over the same period).

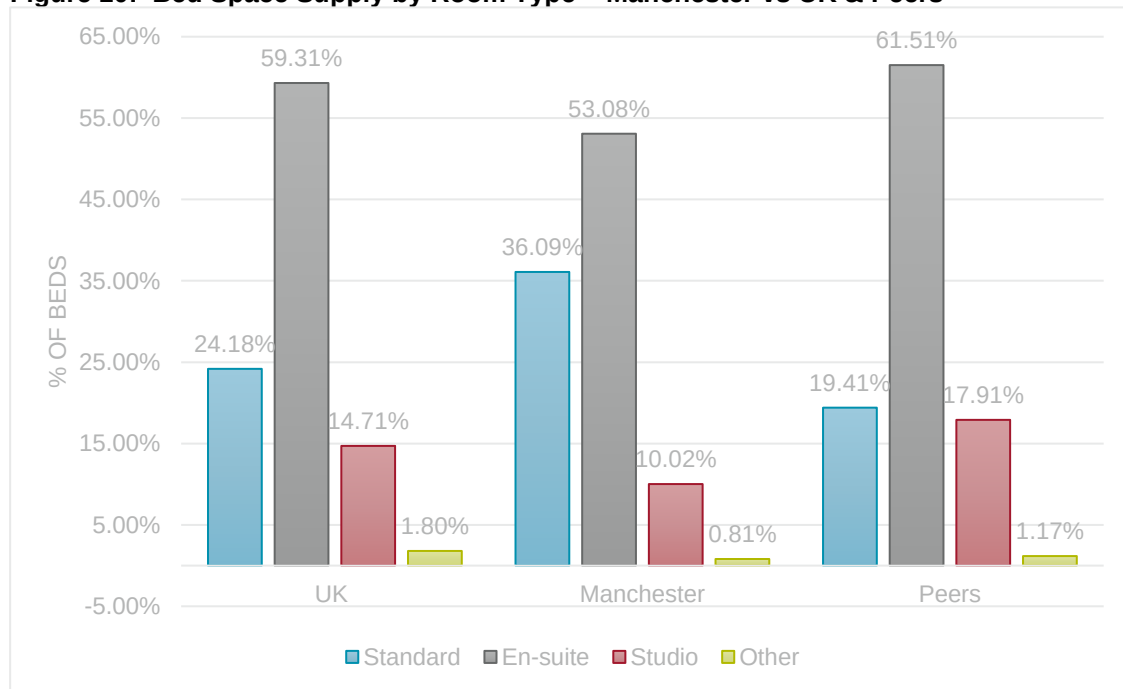
Figure 9: New PBSA Beds and Net Change, Major UK Locations 2012-2021



Source: Cushman & Wakefield Student Accommodation Tracker

56. As can be seen from the chart, Manchester has seen the lowest net increase in PBSA beds delivered between 2012 and 2021, and the second fewest number of new bed spaces delivered over this period after Bristol.
57. A lack of change and renewal in the market is arguably impacting the student experience of those living in PBSA as highlighted by Manchester's larger share of older bed spaces analysed below. Manchester is home to a larger percentage of older, shared bathroom bedrooms than the national average. This can be seen on the chart below.

Figure 10: Bed Space Supply by Room Type – Manchester vs UK & Peers



Source: Cushman & Wakefield Student Accommodation Tracker 2021/22. Peers are the 10 other major UK PBSA markets (exc London) highlighted above

58. As can be seen, Manchester's supply of en-suite beds is considerably lower than the national and peer group average, with a large number of standard shared bathroom bed spaces available. Of course, Fusion Manchester DevCo Ltd plans to deliver high quality private bathroom accommodation to the Manchester market. It should also be noted that the COVID-19 pandemic has the potential to change the demand for student accommodation, with anecdotal evidence of reduced demand for shared bathroom facilities. Nationally, only 5.4% of all new beds delivered over the last five years feature shared bathrooms. The combination of Fusion's en-suite, studio, twodio, social studio and apartment room types will increase the number and percentage of high-quality en-suite beds in the market.

Development Pipeline

59. Based on information from Manchester City Council's planning portal, the PBSA development pipeline in Manchester (including Fusion Manchester DevCo Ltd) currently stands at 2,132 beds across eight developments. As I understand it, 1,271 beds have approval, the largest of which is Student Castle's 853 bed Hulme street development (121252/FO/2018) referenced earlier in this Proof at paragraph 26. Three of these developments are set to open in time for the 2022/23 academic year: Unite Students' Parkway Gate extension and refurbishment (14 beds); Unite Students' extension of Kincardine Court (100 beds); and Alumno's Element Manchester scheme (62 beds). The most recent planning application in the PBSA pipeline is Curlew's 261 bed proposed development on Boundary Lane submitted in May 2021 which is yet to be determined.

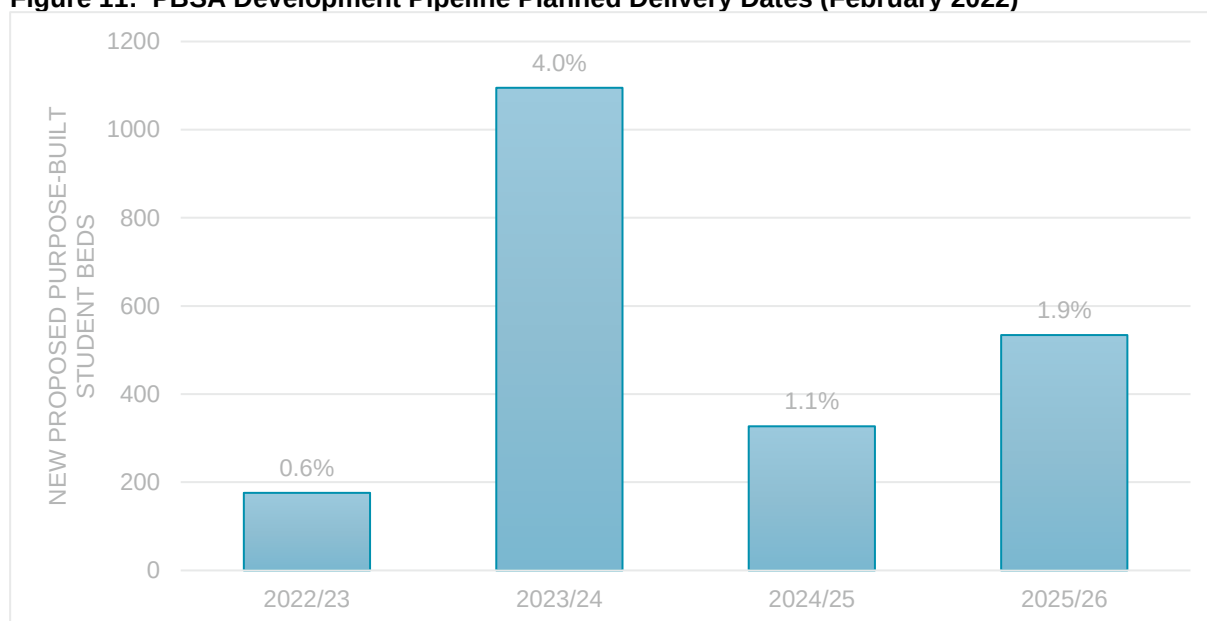
Table 4: Manchester City Council PBSA Development Pipeline (February 2022)

Address	Postcode	Planning Reference	Application date	Status	Number of beds	Studios	Clusters	Applicant	Anticipated opening
Echo Street	M1 7DP	118267/FO/2017	Mar-18	Approved	242	36	206	IQ Student Accommodation	Aug-23
Hulme Street	M1 5GL	121252/FO/2018	Sep-18	Approved	853	853	0	Student Castle	Aug-23
Kincardine Court, Kincardine Road	M13 9JA	124472/FO/2019	Aug-19	Approved	100	0	100	UNITE Group Plc	Aug-22
84 Cambridge Street	M15 6BP	125654/FO/2019	Dec-19	Approved	62	62	0	Alumno Developments	Aug-22
Harry Lord House, 120 Humphrey Road	M16 9DF	101155/OUT/20	Jul-20	Outline Approval	66	66	0	QP2 Ltd	Jan-24
Land At Chester Road(A56), Deansgate, /Bridgewater Viaduct	M3 4LB	129406/FO/2021	Feb-21	Submitted	534	289	245	Fusion Students	May-25
Parkway Gate, 50 Chester Street	M15 6JH	129886/FO/2021	Mar-21	Approved	14	11	3	UNITE Group Plc	Sep-22
The Gamecock, Boundary Lane	M15 6GE	130387/FO/2021	May-21	Submitted	261	37	224	Curlew Capital Ltd	Sep-24

Source: Manchester City Council Feb 2022

60. Development of all beds in the development pipeline would represent a 7.8% increase in student beds in Manchester spread over four years of development. The pipeline is relatively spread out in terms of delivery date, with three schemes opening in 2022, two in 2023, two in 2024 and one in 2025.

Figure 11: PBSA Development Pipeline Planned Delivery Dates (February 2022)



Source: Manchester City Council Feb 2022

61. One scheme with planning approval not included in the above pipeline statistics is Phase 1b of the University of Manchester's Fallowfield Redevelopment. The first phase, a 1,122-bed new build on a site next door to the University's Richmond House and Owen's Park schemes opened in 2019/20. The University also received full approval for Phase 1b which was a redevelopment of its Oak House scheme. Phase 2 of this scheme received outline planning but I understand this has since expired.

62. As I understand it, Phase 1b would consist of demolishing the University's 1,112 bed Oak House scheme and building 1,191 beds in its place, a net increase of 79 beds. Any mention of further development of PBSA on the Fallowfield campus has been removed from the University's website.

Table 5: Fallowfield Campus Redevelopment (as of February 2022)

Address	Postcode	Planning Reference	Application date	Status	Number of beds	Studios	Clusters	Applicant	Anticipated opening
Wilmslow Road (Fallowfield Campus Phase 1b - Oak House)	M14	110184/FO/2015/S1	Sep-15	Approved	1,191	0	1,191	University of Manchester	n/a

Source: Manchester City Council February 2022

Student to Bed Ratio/ Unmet Need Calculations

63. Based on the latest market information, I have updated the calculations provided in the 2020 Need Report to account for 2019/20 and 2020/21 full-time student numbers. The revised projections consider the following scenarios:
- 1.5% growth in the demand pool is annually achieved from 2021/22 onwards (i.e. the original conservatively modelled scenario) with updated pipeline projections;
 - 3.2% growth in the demand pool is achieved annually from 2021/22 onwards (i.e. revised modelling taking an average of growth between 2013/14 and 2020/21) with updated pipeline projections.
64. All 2,132 beds in the development pipeline (approved and to be determined) have been included in supply projections based on the current anticipated year of delivery. I have also modelled delivery of an additional supply scenario, where an additional 500 theoretical bed spaces are delivered each year to 2029/30 over and above those in the development pipeline.

Table 6: Demand vs Supply Conditions, 1.5% Demand Pool Growth Per Annum Scenario (actual and modelled pipeline)

	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
Original C&W Need Report Demand Pool (1.5% growth per annum post 2020/21)	42,765	43,365	46,025	46,200	46,915	47,495	47,405	52,230	53,015	53,810	54,615	55,435	56,265	57,110	57,965	58,835	59,720
Number of Beds (all pipeline post-2021)	22,893	23,256	23,119	23,180	23,975	24,113	25,740	26,800	27,178	27,354	28,449	28,776	29,310	29,310	29,310	29,310	29,310
Student to bed ratio	1.87	1.86	1.99	1.99	1.96	1.97	1.84	1.95	1.95	1.97	1.92	1.93	1.92	1.95	1.98	2.01	2.04
Students unable to access PBSA	19,872	20,109	22,906	23,020	22,940	23,382	21,665	25,430	25,837	26,456	26,166	26,659	26,955	27,800	28,655	29,525	30,410
Beds Needed to Maintain 20/21 HMO numbers									27,585	28,380	29,185	30,005	30,835	31,680	32,535	33,405	34,290
Difference between maintaining 20/21 HMO numbers and bed delivery									-407	-1,026	-736	-1,229	-1,525	-2,370	-3,225	-4,095	-4,980
<i>Additional delivery scenario = all pipeline + 500 additional per annum</i>										27,854	28,949	29,276	29,810	30,310	30,810	31,310	31,810
<i>SBR</i>										1.93	1.89	1.89	1.89	1.88	1.88	1.88	1.88
<i>Students unable to access PBSA</i>										25,956	25,666	26,159	26,455	26,800	27,155	27,525	27,910
<i>Beds Needed to Maintain 20/21 HMO numbers</i>										28,380	29,185	30,005	30,835	31,680	32,535	33,405	34,290
<i>Difference between maintaining 20/21 HMO numbers and bed delivery</i>										-526	-236	-729	-1,025	-1,370	-1,725	-2,095	-2,480

Source: Cushman & Wakefield/HESA/Manchester City Council Planning Portal February 2022

65. As can be seen from the table, under the conservatively modelled growth scenario, the demand pool is set to grow by 14% between 2020/21 and 2029/30. Over the same period the supply of PBSA is set to grow by 9% if all planned bed spaces are delivered. The number of students unable to access PBSA over this period is set to grow from 25,430 in 2020/21 to 34,290 in 2029/30. Over the period, the difference between maintaining 2020/21 numbers in private rented stock and PBSA bed delivery is set to grow by 4,980, placing further pressure on HMOs and apartments in Manchester.
66. Under the theoretical additional pipeline scenario where 500 additional beds are delivered each year from 2022/23 (the forthcoming academic year), the number of students unable to access PBSA will still rise – from 25,430 in 2019/20 to 27,910 in 2029/30. Even under this additional pipeline scenario, the difference between maintaining 2020/21 private rented sector numbers and PBSA delivery will be 2,480.
67. Of course, analysis has already shown the 1.5% increase to be conservative and I have therefore modelled growth at 3.2% per annum – i.e. annual average growth in the demand pool between 2013/14 and 2020/21. This analysis can be seen below.

Table 7: Demand vs Supply Conditions, 3.2% Growth Per Annum Scenario (actual and modelled pipeline)

	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
Revised Projections (3.2% growth)	42,765	43,365	46,025	46,200	46,915	47,495	47,405	52,230	53,880	55,583	57,340	59,151	61,021	62,949	64,938	66,990	69,107
SBR	1.87	1.86	1.99	1.99	1.96	1.97	1.84	1.95	1.98	2.03	2.02	2.06	2.08	2.15	2.22	2.29	2.36
Students unable to access PBSA	19,872	20,109	22,906	23,020	22,940	23,382	21,665	25,430	26,702	28,229	28,891	30,375	31,711	33,639	35,628	37,680	39,797
<i>Beds Needed to Maintain 20/21 HMO numbers</i>									28,450	30,153	31,910	33,721	35,591	37,519	39,508	41,560	43,677
<i>Difference to bed delivery</i>									-1,272	-2,799	-3,461	-4,945	-6,281	-8,209	-10,198	-12,250	-14,367
<i>Additional delivery scenario = all pipeline + 500 additional per annum</i>										27,854	28,949	29,276	29,810	30,310	30,810	31,310	31,810
<i>SBR</i>										2.00	1.98	2.02	2.05	2.08	2.11	2.14	2.17
<i>Students unable to access PBSA</i>										27,729	28,391	29,875	31,211	32,639	34,128	35,680	37,297
<i>Beds Needed to Maintain 20/21 HMO numbers</i>										30,153	31,910	33,721	35,591	37,519	39,508	41,560	43,677
<i>Difference between maintaining 20/21 HMO numbers and bed delivery</i>										-2,299	-2,961	-4,445	-5,781	-7,209	-8,698	-10,250	-11,867

Source: Cushman & Wakefield/HESA/Manchester City Council Planning Portal February 2022

68. Under this scenario, the demand pool is set to grow by 32% and the number of students unable to access PBSA over this period is set to grow from 25,430 in 2020/21 to 39,797 in 2029/30. Over the period, the difference between maintaining numbers in the private rented sector at 2020/21 levels and new PBSA bed delivery will be 14,367, placing further significant pressure on HMOs and apartments in Manchester.
69. Under the theoretical additional pipeline scenario where 500 additional beds are delivered each year from 2022/23 (the forthcoming academic year), the number of students unable to access PBSA will rise – from 25,430 in 2019/20 to 37,297 in 2029/30. Even under this additional pipeline scenario, the difference between maintaining the number of students in private rented stock vs new bed delivery will stand at 11,867.
70. Therefore, even under the most conservatively modelled scenarios, and with additional theoretical pipeline beds delivered to the market, need is set to increase from a position where 25,430 students are already unable to secure a PBSA bed. Of course, this has implications for the housing market and students studying in Manchester in terms of pastoral care and student experience. This can be considered especially important at a time when there has been a 450% increase in student mental health declarations over the last decade³¹, with over half of students reporting their mental health had worsened during the pandemic.³² Fusion Students is an established national provider of quality PBSA and delivers quality social and amenity spaces that support student interaction. The importance of these spaces should not be underestimated, with HEPI reporting that “there is sector-wide and consumer consensus that social spaces are important to the student experience and community building, and are therefore a priority”.³³ The proposed development will feature a range of indoor and outdoor spaces to support interaction.³⁴ Additionally, Fusion’s Social Spaces, Amenities and Student Wellbeing Strategy recognises that “students can often be vulnerable” and that staff “are trained to recognise when members of their building’s community may be struggling”. A range of other services are also provided, including a Mental Health Portal and on-site doctor’s service. The Fusion Strategy reflects Manchester City Council’s desire that “purpose-built accommodation should consider the welfare and wellbeing of students as a major factor”.³⁵
71. Our Manchester - The Manchester Strategy (CD-G9), notes that “freeing up former student lets and, therefore increasing the supply of good quality homes for sale and rent will provide the opportunity for Manchester residents to raise their individual and collective aspirations”.³⁶ The analysis above shows that more students are likely to be forced into HMO accommodation as the demand pool for beds in Manchester grows. Further, MCC Executive PBSA in Manchester Report December 2020 (CD-G12) noted that “Students are exempt from paying Council Tax and in 2019/20 Manchester will forego almost £17m in tax revenue due to this exemption. There is potential to improve the Council’s Council Tax revenue through a reduction in student Council Tax exemptions in city centre and south Manchester properties by directing students to purpose built student

³¹ <https://www.ucas.com/corporate/news-and-key-documents/news/450-increase-student-mental-health-declarations-over-last-decade-progress-still-needed-address>

³² <https://www.officeforstudents.org.uk/news-blog-and-events/blog/making-student-mental-health-a-priority/>

³³ <https://www.hepi.ac.uk/wp-content/uploads/2020/08/HEPI-Student-Accommodation-Report-FINAL.pdf>

³⁴ https://pa.manchester.gov.uk/online-applications/files/C79C213BC3DA479940BB71041FFD0301/pdf/129406_FO_2021-SOCIAL_SPACES_AMENITIES_STUDENT_WELLBEING_STRATEGY-1626176.pdf

³⁵ <https://democracy.manchester.gov.uk/documents/s11499/Student%20Accommodation.pdf>

³⁶ <https://democracy.manchester.gov.uk/documents/s20052/Purpose%20Built%20Student%20Accommodation.pdf>

accommodation (PBSA)".³⁷ There are likely to be further exemptions without additional PBSA development based on the analysis in this Proof. The proposed 534 bed development has the potential to free up or prevent from use as HMOs, a total of 134 homes (at four students per household).

72. It is clear that students are increasingly looking to live in central areas of Manchester where a higher quality of housing is available. MCC Executive PBSA in Manchester Report December 2020 (CD-G12)³⁸ notes that in "four areas in South Manchester with the highest concentration of student HMOs" ... "the number of student exemptions has reduced by 32% between 2010 and 2019. In the city centre, the number of student exemptions has increased by 24% over the same period". This reflects Cushman & Wakefield's own analysis of HESA data between 2015/16 and 2019/20 which shows clear evidence of a movement of students from South Manchester to the city centre.

Table 8: Change in Students by Postcode Area 2015/16 to 2019/20

Largest Reduction			Highest Gains		
Postcode 2015	Change in Students 2015/16 to 2019/20	Location	Postcode 2015	Change in Students 2015/16 to 2019/20	Location
M14 6	-1655	Fallowfield	M1 7	305	Central/MMU
M20 4	-235	Withington	M1 5	265	Central/MMU
M20 3	-165	Withington	M15 6	160	Central/MMU
M14 5	-160	Victoria Park	M15 5	145	Central/MMU
M4 5	-50	Ancoats	M15 4	130	Central/MMU
M14 7	-45	Fallowfield	M1 6	100	Central/MMU
M19 2	-40	Fallowfield	M5 4	95	Salford
M3 6	-40	Salford	M3 7	70	North City Centre
M4 4	-20	NOMA	M3 4	70	North City Centre
M16 7	-15	Moss Side	M16 9	70	Old Trafford

Source: HESA 2015/16 to 2019/20

Conclusions

73. Manchester is the third largest UK market by way of full-time student numbers, with Manchester City Council noting that the City is in the top tier for Higher Education internationally. The University of Manchester is the largest single institution in the UK for full-time students.

Student Number Growth

74. Full-time student numbers in Manchester are growing:
- Numbers have risen by 17% between 2012/13 and 2020/21;
 - Numbers have risen by 11% between 2011/12 and 2020/21 (2011/12 being the year before changes were made to the UK tuition fee system).
75. Crucially, the demography of students within Manchester is changing, increasing the demand for quality PBSA beds:
- Non-UK full-time students have grown by 7,245 between 2012/13 and 2020/21

³⁷ <https://democracy.manchester.gov.uk/documents/s20052/Purpose%20Built%20Student%20Accommodation.pdf>

³⁸ <https://democracy.manchester.gov.uk/documents/s11499/Student%20Accommodation.pdf>

- This growth is accelerating with a 28% increase in non-UK students between 2016/17 and 2020/21 (4,465 students)
- Non-UK students increased by 12% in the single year between 2019/20 and 2020/21 (2,235 students)
- Since 2012/13, non-UK students have accounted for 70% of all growth, increasing the demand pool for PBSA in Manchester
- The direction of travel for the 2021/22 academic year looks even stronger, with a 20% increase in undergraduate acceptances through the UCAS system likely to lead to another significant increase in student numbers
- This 20% increase is double the 10% increase in acceptances seen between 2016 and 2020

Demand Pool for Accommodation

76. Cushman & Wakefield's calculations of demand pools are based on a tested methodology that is trusted by the sector:
- Cushman & Wakefield's demand pool calculation translates to a demand for accommodation lower than that cited in the Market Report associated with the Great Marlborough Street development approved in 2021;
 - The Manchester demand pool sits comfortably in the context of the UK market, as the 10th lowest percentage pool of 13 major UK locations.

Projected Growth

77. Contrary to the City Council's assertion that growth projections were too high, the 1.5% average growth per annum projected by Cushman & Wakefield was purposely conservative. This has proven to be the case in subsequent student number releases (2019/20 and 2020/21) and emerging evidence for 2021/22.
- The growth projection of 1.5% per annum is lower than average non-UK full-time student number growth and growth in the demand pool seen in the period examined in the Need Report (2013/13 to 2018/19);
 - The rate is also lower than the projected average annual growth rate in the UK 18-year-old population between 2019 and 2029;
 - Data since the production of the Report shows that full-time student numbers grew at an average of 4.5% and 9.6% for all students and non-UK students respectively between 2018/19 and 2020/21;
 - In the single year between 2019/20 and 2020/21, full-time numbers grew by 8%, with non-UK numbers rising by 12%;
 - A 20% increase in acceptance growth through UCAS for 2021/22 will flow through to a further significant increase in student numbers.

COVID-19 and Impacts on Demand

78. Contrary to the City Council's assertion that appetite for in-person Higher Education will be impacted by the pandemic, data shows that this is not the case, with the Government expecting face-to-face teaching, reflected by statements by Manchester's key universities:
- In January 2022, the UK Government stated that there are no COVID restrictions for Higher Education and that providers should ensure face-to-face learning without restrictions;
 - The 13% increase in student numbers between 2019/20 and 2020/21 highlights the appetite for Higher Education and is over double the rate of increase seen during The Great Recession;
 - Government guidance is reflected by statements from the University of Manchester and Manchester Metropolitan University, with the former stating all undergraduate and taught postgraduate students will return to campus for Semester 2; and the latter stating that it aims to offer a full, on-campus university experience from September 2021.

Development Pipeline

79. The development pipeline has been updated in this Proof of Evidence, with scenarios modelled to show the impact of beds over and above those in the pipeline:
- Manchester has seen the lowest net increase in beds between 2012 and 2021 of 13 major UK markets, and the second fewest number of new beds delivered;
 - A lack of change and renewal is likely impacting the student experience of those unable to access quality PBSA;
 - Manchester's supply of en-suite beds is considerably below the national average;
 - Few non-en-suite beds are now delivered to the market and this is likely to especially be the case post-COVID-19 – the proposed Fusion Manchester DevCo development would increase the number of quality, individual bathroom products in the market.

Student to Bed Ratios & Unmet Demand

80. Updated calculations in this Proof again show continued unmet demand for PBSA based on the original conservative annual growth projection (1.5%) and the revised projection (3.2%) based on two years of additional data:
- At 1.5% demand pool growth per annum from 2020/21 the number of students unable to access PBSA is set to grow from 25,430 to 34,290 by 2029/30 even if all bed spaces in the development pipeline are delivered;
 - Even under a theoretical scenario where an additional 500 beds are delivered each year over and above all beds in the development pipeline, the number is still set to rise to 27,910;
 - Of course, the 1.5% per annum projection has been proven to be conservative and under the 3.2% per annum projection, the number of students unable to access PBSA is set to

grow from 25,430 to 39,790 by 2029/30 even if all bed spaces in the development pipeline are delivered;

- Under a theoretical scenario where an additional 500 beds are delivered each year over and above all beds in the development pipeline, the number is still set to rise to 37,297.

Benefits of PBSA

- Fusion students is an established national operator, with a track record of delivering high quality accommodation, with social and amenity spaces that support the student experience and will raise the quality of stock in Manchester;
- In an environment of growing student mental health issues, Fusion Students delivers schemes and services that support students;
- The proposed development has the potential to free up (or positively impact on the additional take up of) private rented housing, which impacts Council Tax receipts and can contribute to the wider Manchester Strategy.

