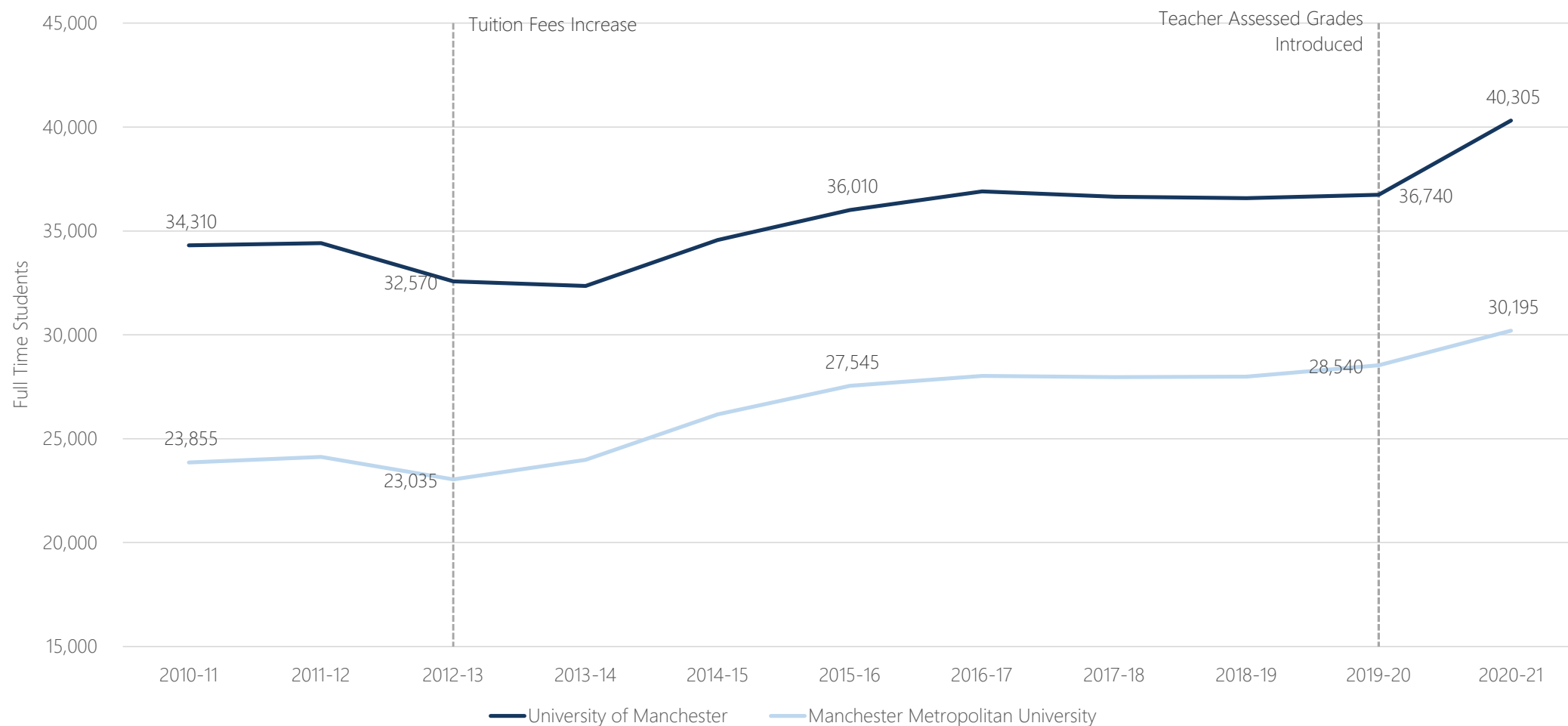

USDAW Site

Evidence of Student Need – Appendices 4 - 17

Appendix 4 – Full Time Students at UoM & MMU (2010/11 – 2020/21)

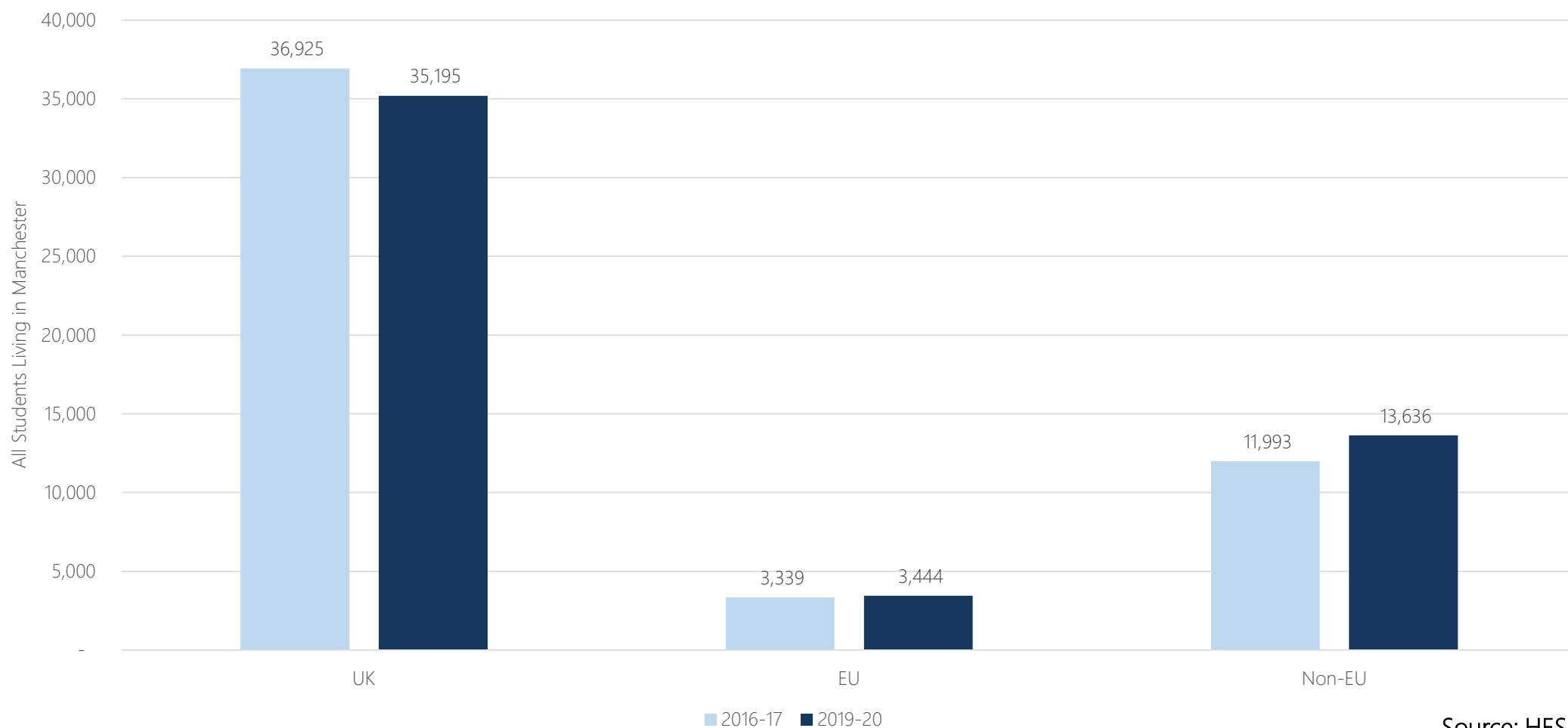
Number of full time students recovered following a significant drop off in response to tuition fees increase in 2012-13 before growing in 2020-21 as the unintended consequence of teacher assessed grades



Source: HESA

Appendix 5 – Domestic students decreasing (5% between 2015-16 & 2019-20) & international students increasing (14% between 2015-16 & 2019-20)

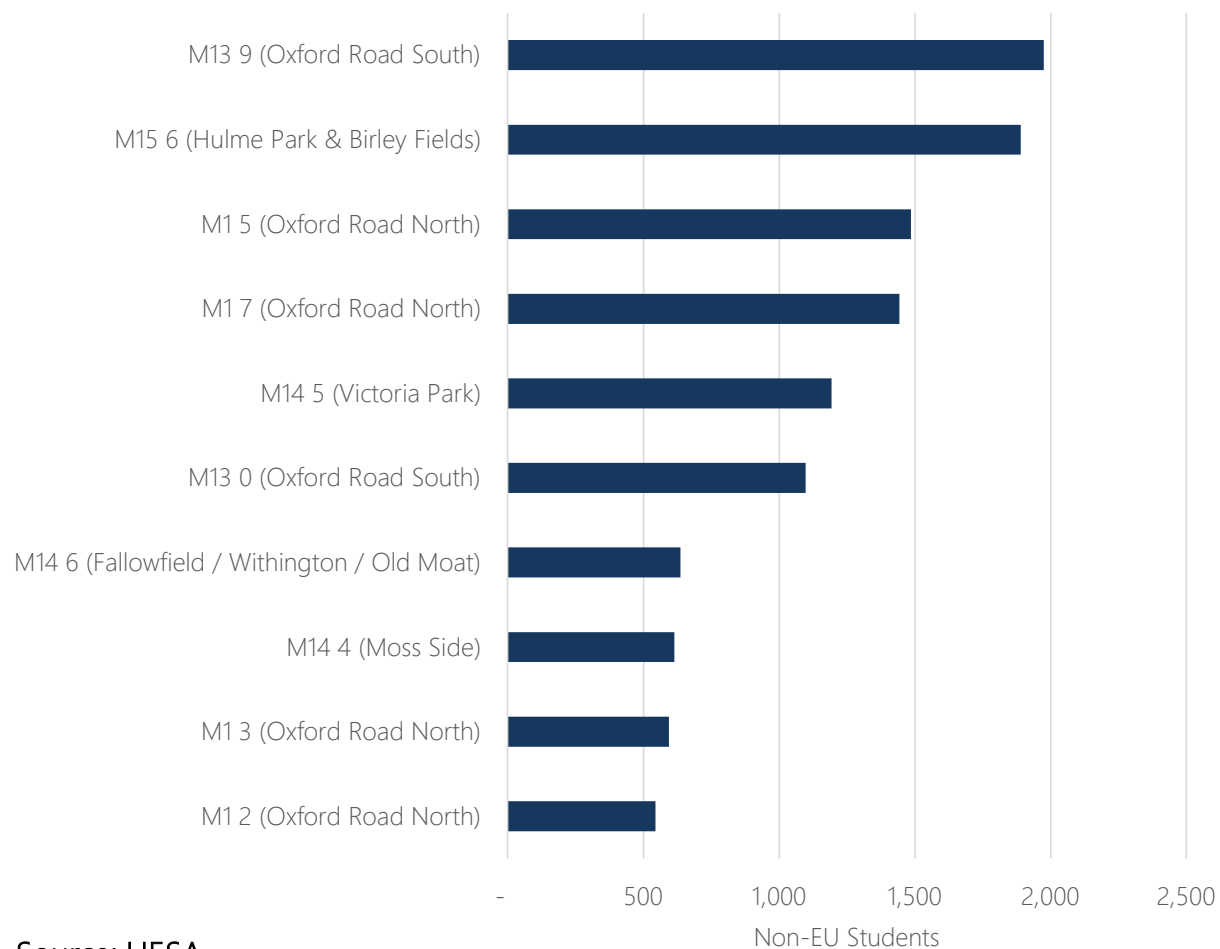
International students making up a greater proportion of the total student population living in Manchester



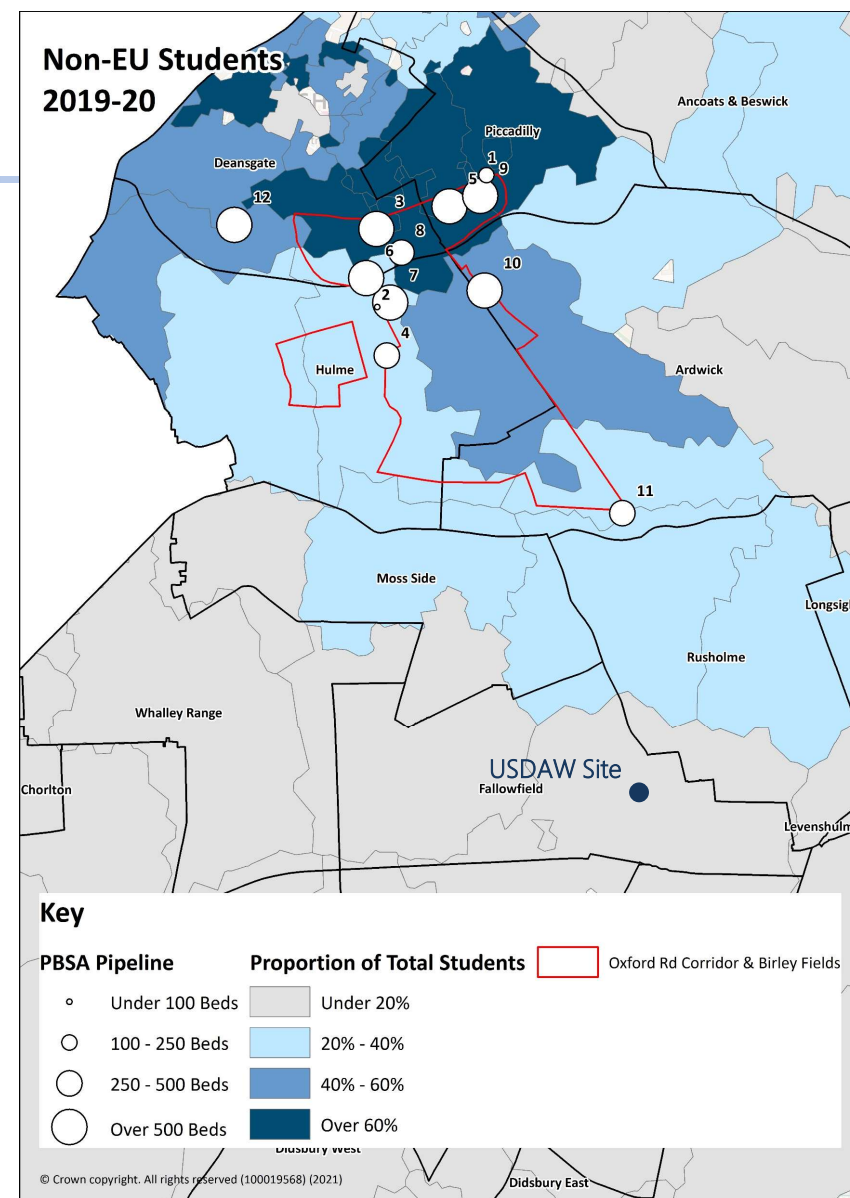
Source: HESA

Appendix 6 – Non-EU Students split by postcode sector

International students overwhelmingly choosing to live in the city centre & around the Oxford Road corridor – not in South Manchester

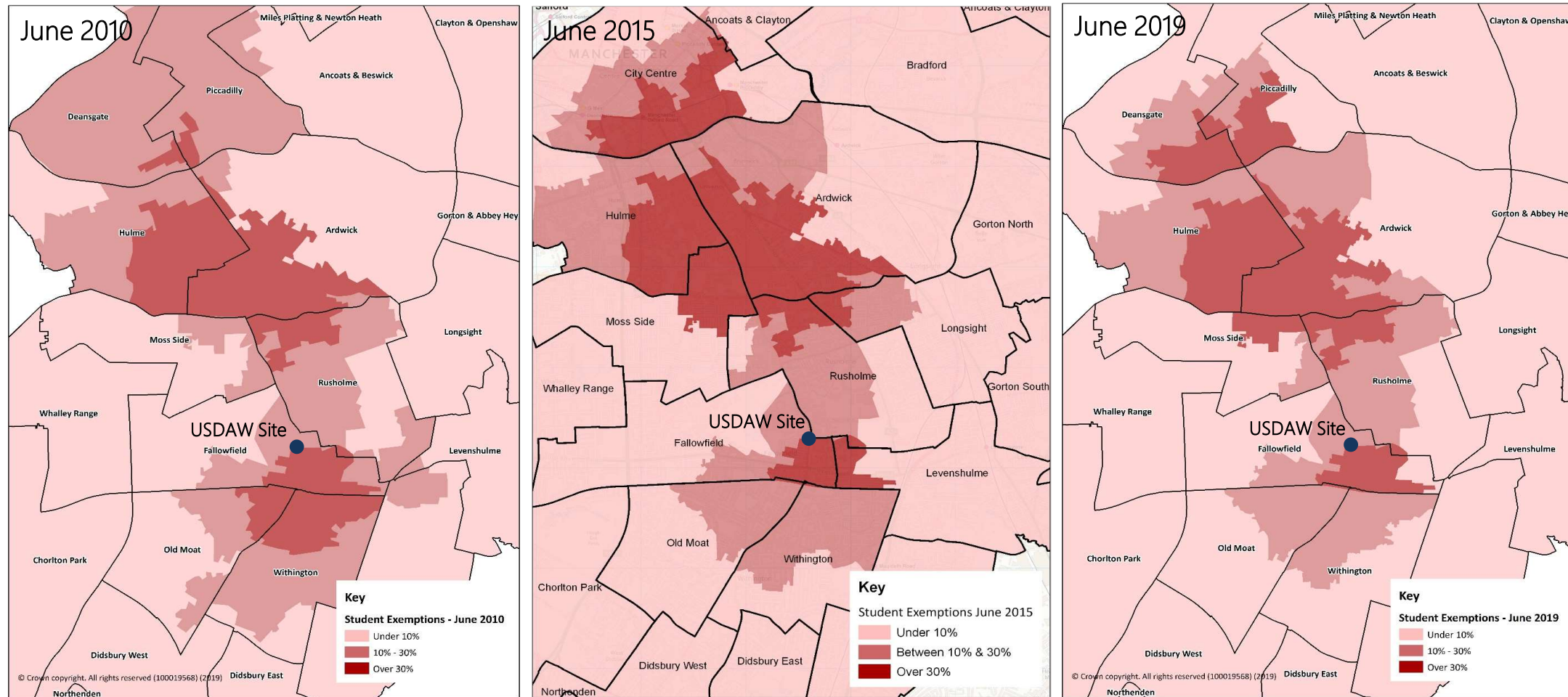


Source: HESA



Appendix 7 – Council Tax exempt student households decreasing in South Manchester by a third (2010 – 2019)

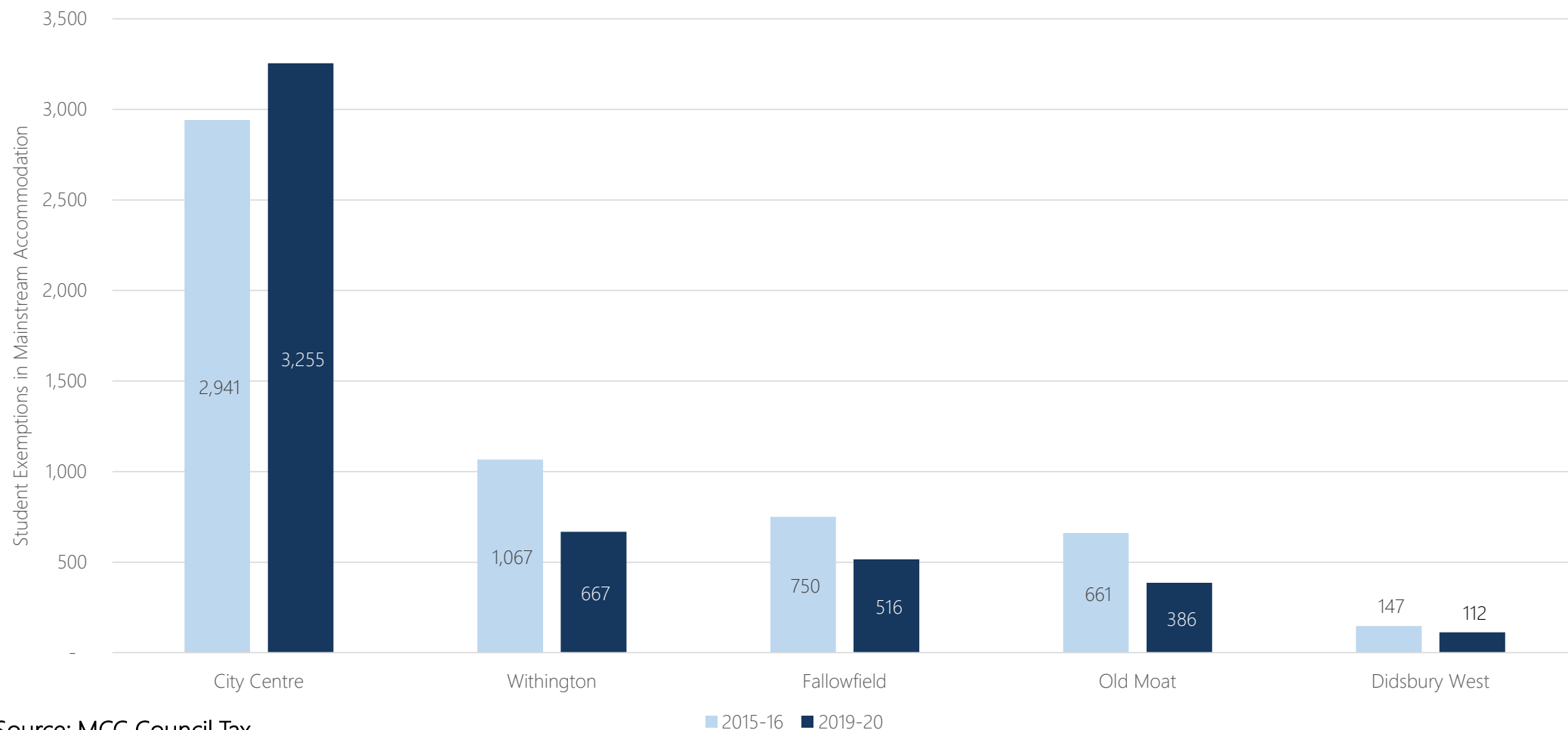
Number of student households in South Manchester reducing as student demand becomes increasingly focussed in & around the Oxford Road Corridor and Hulme – linked to increasing numbers of international students and changing lifestyle expectations



Source: HESA

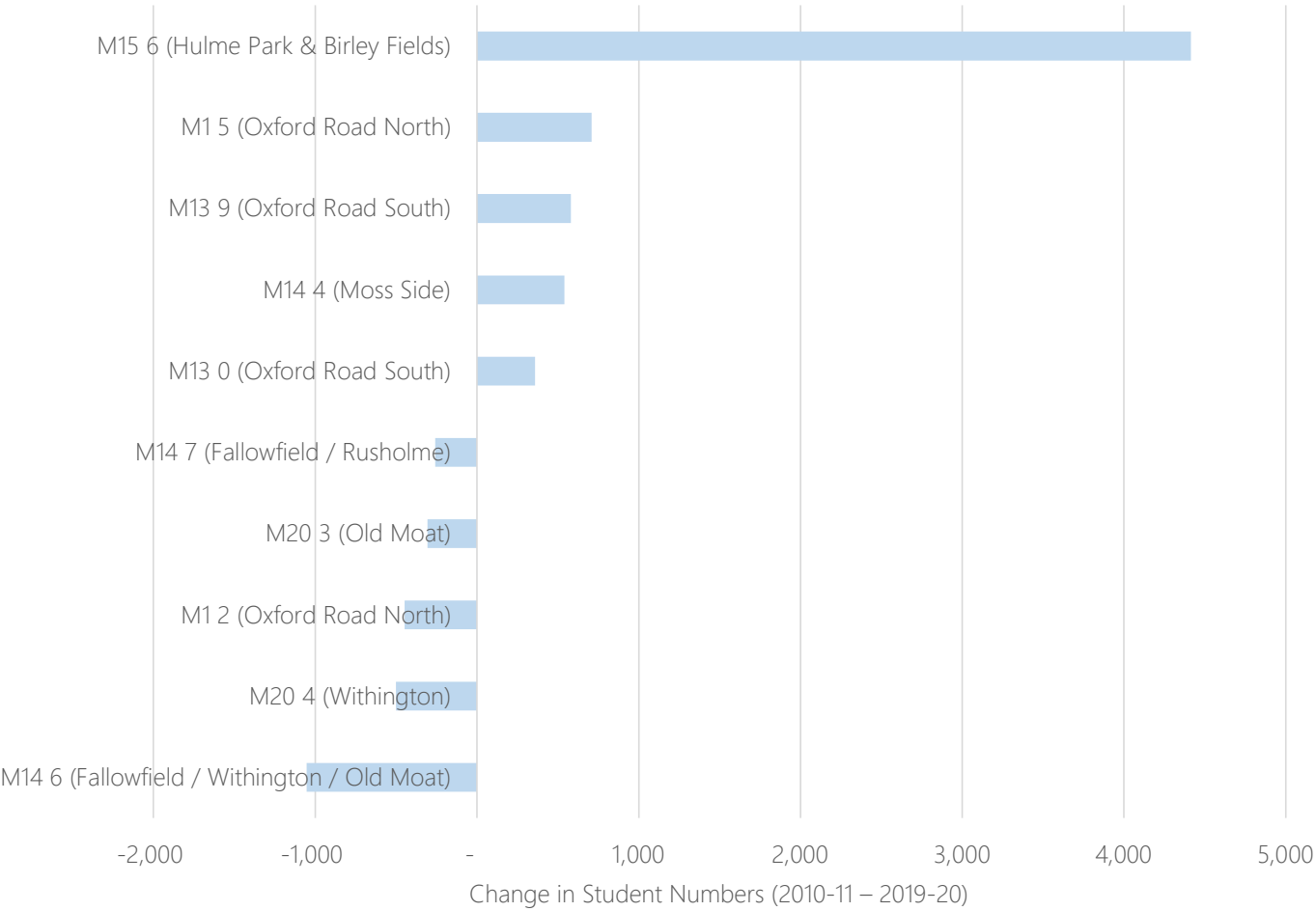
Appendix 8 – Reduction in Council Tax exempt student households of 400 in Withington & 234 in Fallowfield (the ward in which the proposed scheme is located) between 2015-16 & 2019-20

Student households increasing in the city centre by over 300 during the same period- inline with MCC's objectives

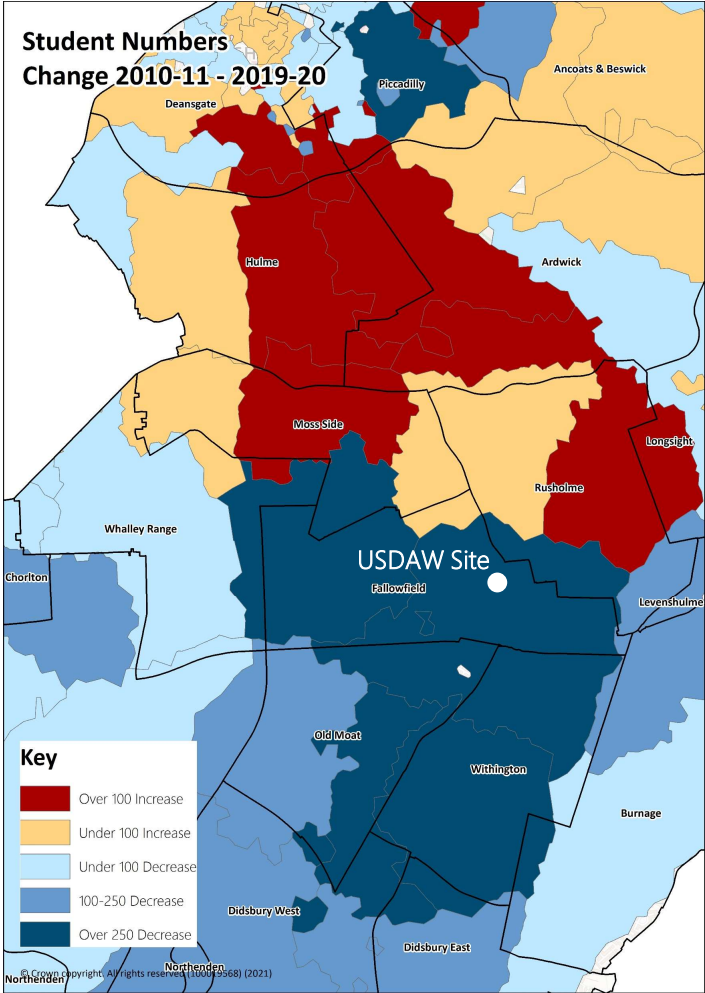


Source: MCC Council Tax

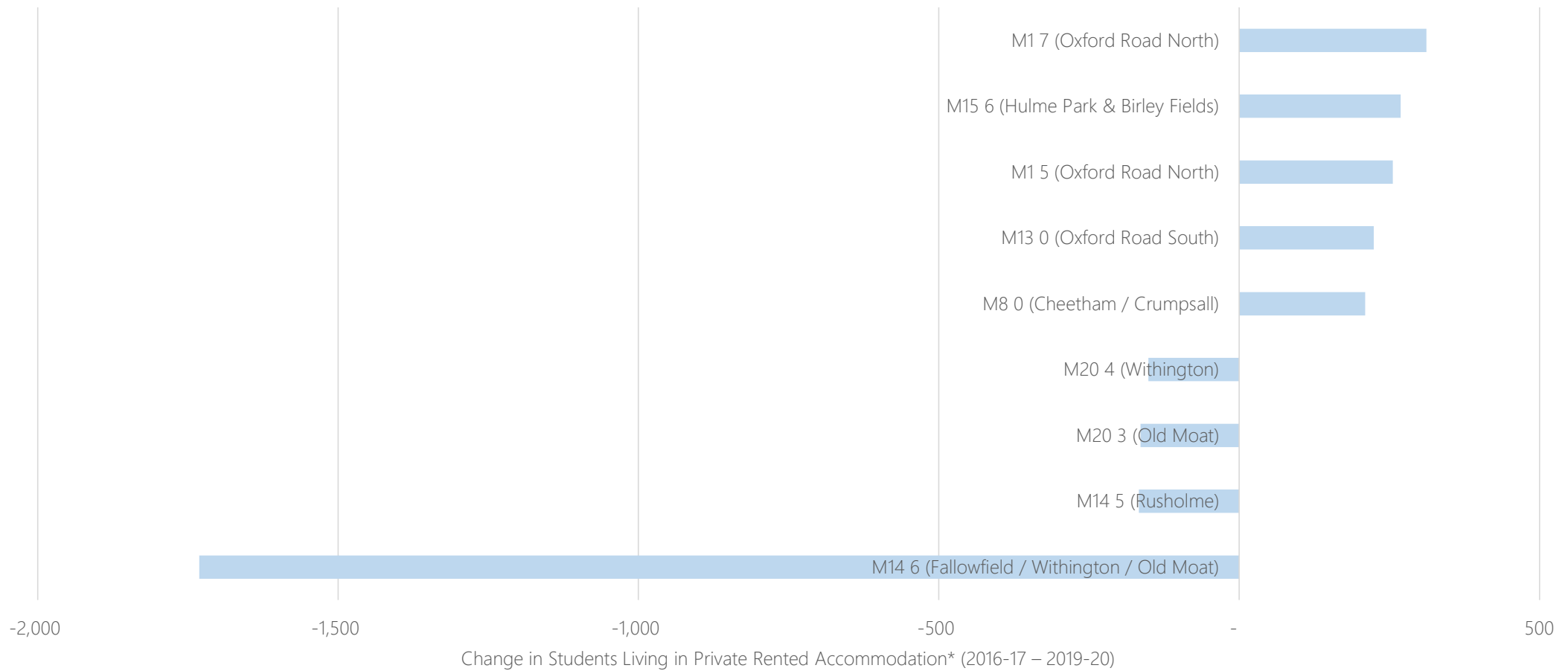
Appendix 9 – Largest reductions in student population in M14 6 (the location of the proposed scheme) between 2010 & 2019



Source: HESA



Appendix 10 – Largest reductions in students in private rented accommodation in M14 6 (the location of the proposed scheme) between 2016/17 & 2019/20



* All postcode sectors where student numbers have fallen by over 20 or increased by over 200 (information on type of accommodation only available from 2016-17 onwards)

Appendix 11 – Pipeline matched to demand (only one substantial new PBSA development has been completed in Fallowfield since 2010)

That was UoM's Unsworth Park (1,122 beds) at Owens Park – this is reprovision for Halls of Residence which have been closed on the same site

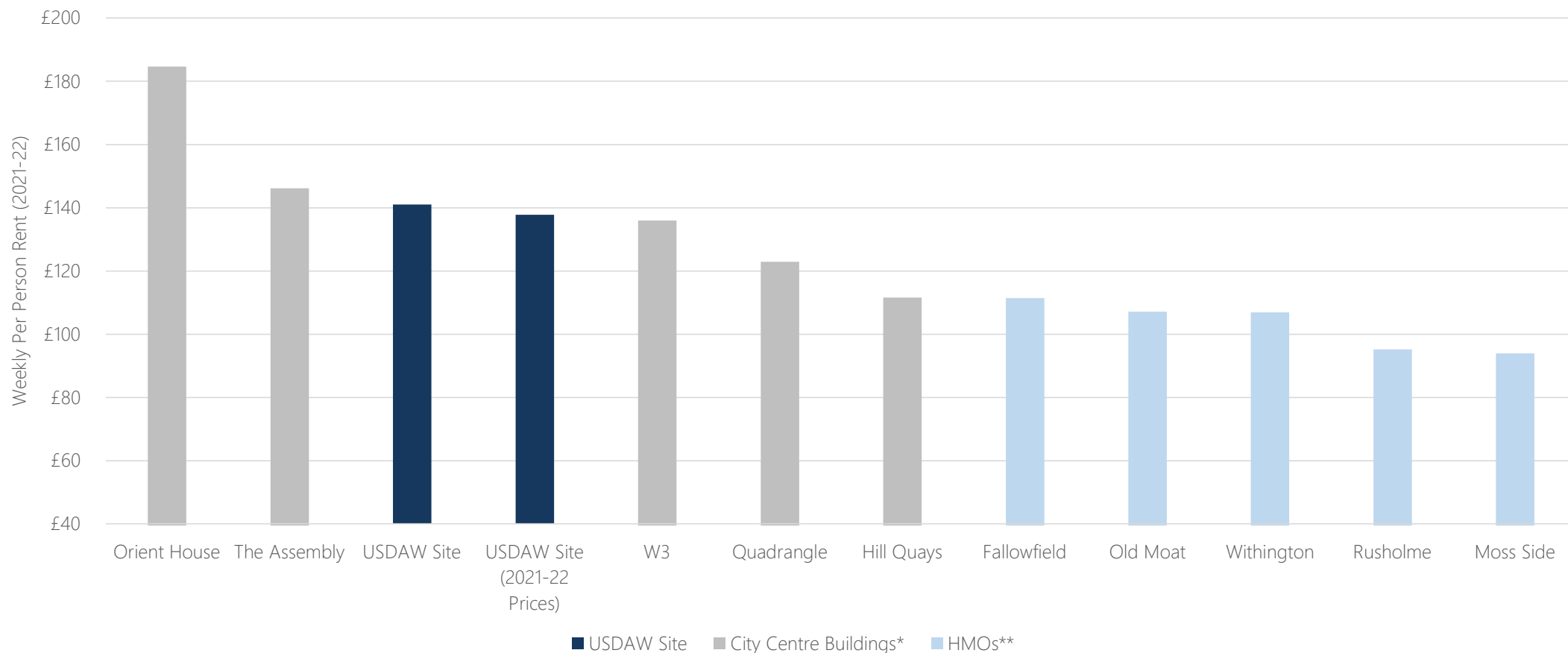
PBSA Scheme	Location	Completion Date	Beds
The Grafton	City Centre	2010/11	145
Cavendish Place	Hulme	2011/12	119
Liberty Heights	City Centre	2012/13	520
Piccadilly Point	City Centre	2012/13	58
Ropemaker Court	Moss Side	2012/13	416
Ducie Court	Moss Side	2013/14	614
Birley Fields*	Hulme	2014/15	967
Vita First Street	City Centre	2014/15	279
Vita Circle Square Phase 1a	City Centre	2017/18	748
The Chapel	City Centre	2017/18	102
Vita Circle Square Phase 1c	City Centre	2019/20	384
Owens Park - Unsworth Park*	Fallowfield	2019/20	1,122
UNITE Tower	City Centre	2020/21	603
River Street Tower	City Centre	2020/21	807
Archway Halls	Hulme	2021/22	491
Total			7,375

* Reprovision

Source: MCC Residential Tracker

Appendix 12 – USDAW Site rents are priced well above the HMO market in South Manchester

Proposed rents are more closely aligned to premium mainstream city centre apartment blocks – price sensitive students unlikely to move out of the HMO market for a more expensive product (especially not in the city centre)



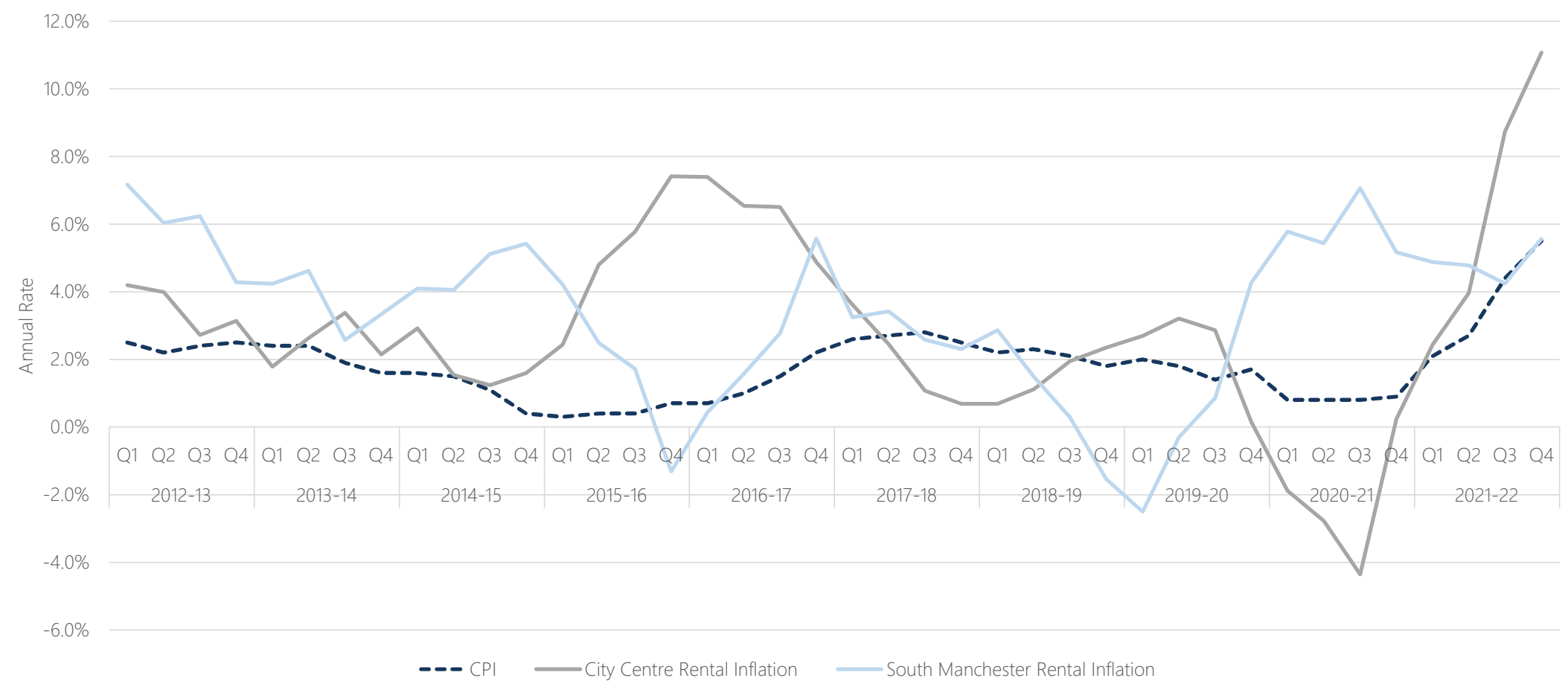
* Top 5 city centre buildings with most mainstream student exemptions (2019/20)

** Top 5 wards with the most mainstream student exemptions

Source: USDAW Site rents provided by the appellant / Rightmove data

Appendix 13 – Annual rental inflation in the city centre & South Manchester not aligned to CPI

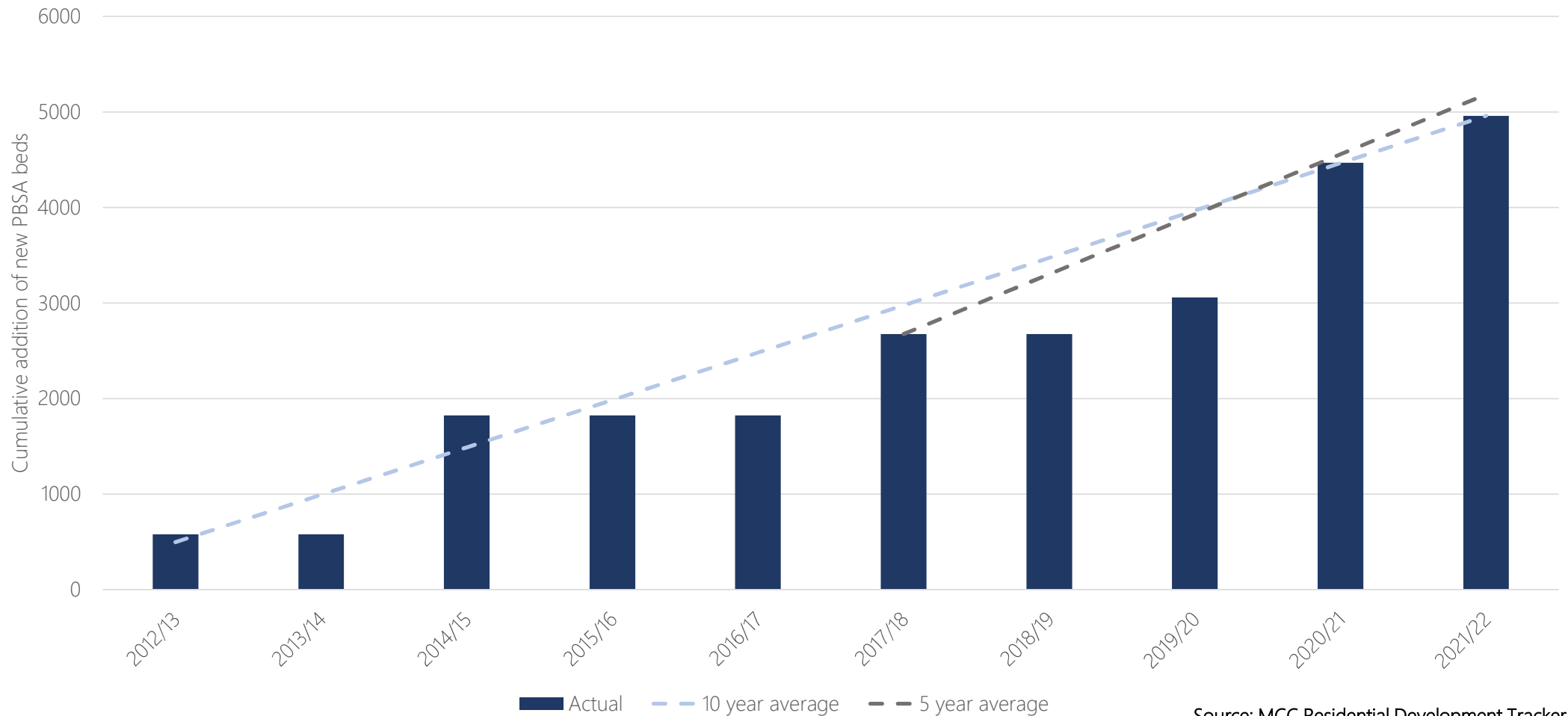
Appellant’s rental growth assumptions (methodology based on CPI) out of sync with rental growth in the city



Source: ONS / Rightmove data

Appendix 14 - 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 496 p.a. (with the rate of delivery rising to 627 p.a. over the last 5 years)

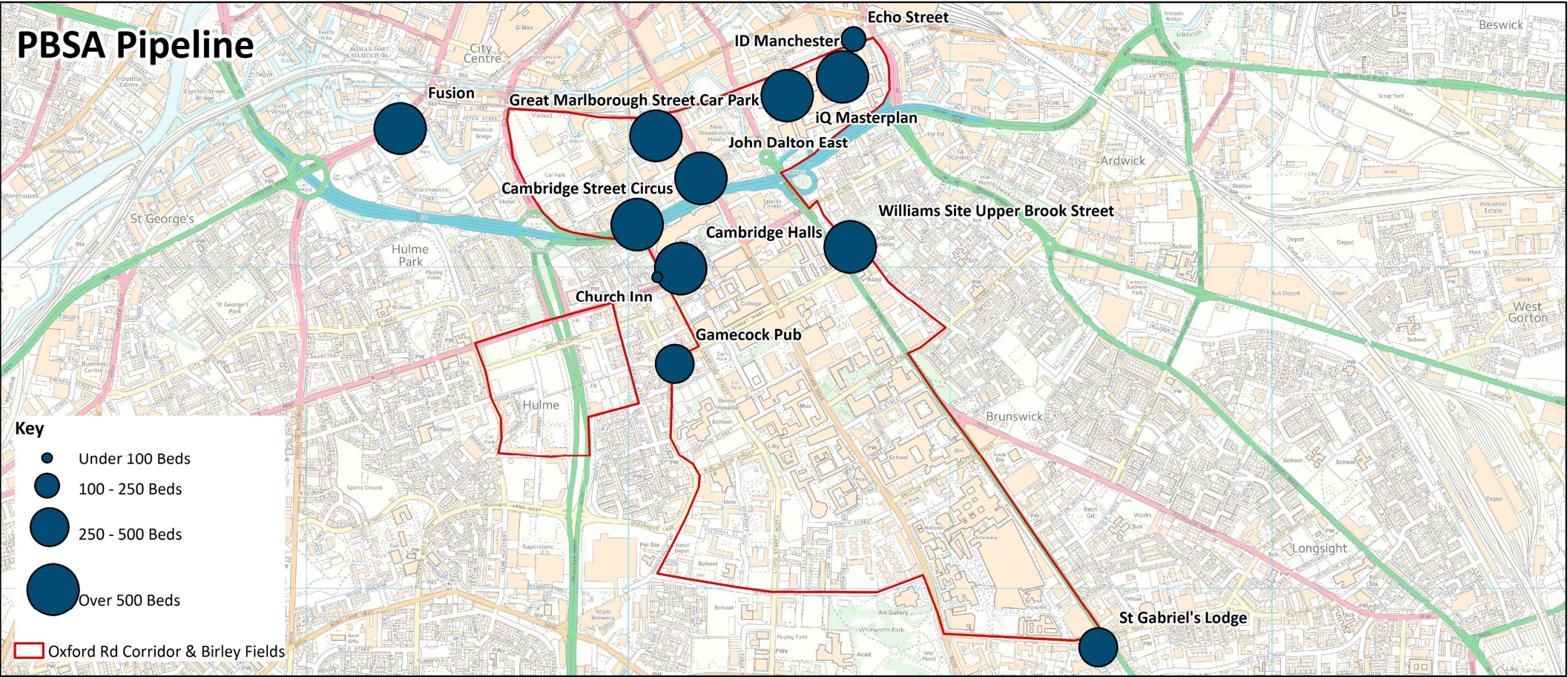


Source: MCC Residential Development Tracker

Appendix 15 – Sites identified by MCC for the development of PBSA equating to a potential c.497 beds per annum over the next 15 years

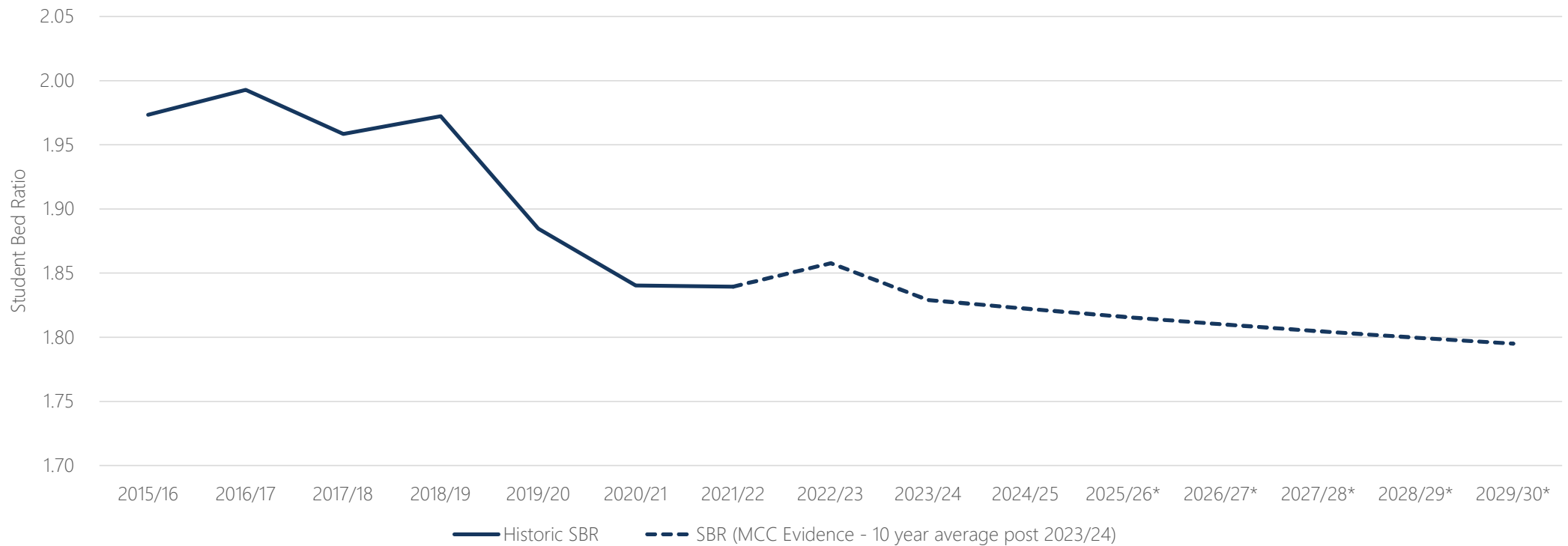
PBSA Scheme	Location*	Operator	Status	Beds
Church Inn	Oxford Road South	Alumno	On-site	62
Echo Street	Oxford Road North	IQ	On-site / Stalled	242
Great Marlborough Street Car Park	Oxford Road North	GMS (Parking)	Planning Approved	853
Fusion	Owen Street & First Street	Fusion Students	Planning Approved	532
Gamecock Pub	Hulme Park & Birley Fields	Curlew	Planning Submitted	260
St Gabriel's Lodge	Oxford Road South	McLaren Property	Public Consultation	318
John Dalton East	Oxford Road North	MMU	Proposed mixed use redevelopment of existing faculty building	500
Cambridge Street Circus	Oxford Road North	Urban Splash	Proposed (on MCC Land)	740
Cambridge Halls	Oxford Road South	MMU	Proposed redevelopment of existing Halls of Residence	830
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	Logik	Site assembly underway. Part of an approved Regeneration Framework (on land in University ownership)	1,000
iQ Masterplan	Oxford Road North	iQ	Part of a Regeneration Framework agreed in principle	1,123
Total				7,460

Appendix 16 – Map of sites identified by MCC for the development of PBSA



Appendix 17 – Future demand met by expected pipeline

Assuming a 1.2% growth in the student demand pool (the appellant's projection) - delivery of PBSA beds at a level commensurate with historic supply is sufficient to meet and exceed demand leading to a reduced SBR from 1.84 in 2020-21 to 1.79 in 2029-30



* Post 2019/20 demand pool assumed 1.2% p.a. increase

	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 (assumed to grow by 1.2% p.a. post 2019/20)	52,302	52,938	53,581	54,231	54,890	55,549	56,215	56,890	57,573	58,263	58,963	59,670	60,386	61,111	61,844
Number of beds (MCC Evidence - 10 year average post 2023/24)	26,504	26,565	27,360	27,498	29,125	30,185	30,563	30,625	31,478	31,974	32,470	32,966	33,462	33,958	34,454
SBR (MCC Evidence - 10 year average post 2023/24)	1.97	1.99	1.96	1.97	1.88	1.84	1.84	1.86	1.83	1.82	1.82	1.81	1.80	1.80	1.79