

PLYMOUTH STUDENT ACCOMMODATION FEBRUARY 2017

PLYMOUTH &
SOUTH WEST
DEVON JOINT
LOCAL PLAN



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Student Accommodation in Plymouth – January 2017

Background

Over recent years, there has been a growth in speculative planning applications for purpose built student accommodation in and around Plymouth's city centre. A number of these applications have been given planning consent, but have not been delivered resulting in a number of lapsed consents due to non-implementation. This position is not necessarily widely understood and concerns seem to be growing about a potential over provision of purpose built student accommodation in Plymouth and the consequence arising from possible over supply and levels of under occupancy.

This paper seeks to consider the demand, supply and impact that student accommodation can have on Plymouth and the City's future housing provision. Specifically, this paper seeks to:

- bring together market intelligence on supply and demand for student accommodation in the city and understand target needs now and in the future;
- quantify and gain perspective on lapsed planning permissions for purpose built student accommodation;
- quantify the number of dwellings that are occupied exclusively by students;
- review the Homes in Multiple Occupancy (HMO) licensing register and quantify the number of larger dwellings that are exclusively occupied by students and analyse their locality in relation to the Article 4 Direction designated area.
- review the potential release of student occupied properties that could be returned to non-student residency as a result of PBSA provision (having regard to the NPPG).
- identify measures that could be applied to control the location, enhance quality and adaptability, manage impact and help to deliver mixed use developments that include a proportion of purpose built student accommodation.

The Importance of Student Accommodation in Plymouth

The education economy is of significant importance to Plymouth. The city hosts three major Higher Education Institutes (HEI) including Plymouth University, the University of St Mark and St John and Plymouth College of Art. It has recently been reported that in 2013/14, Plymouth's student population contributed a significant £300 million in to the city economy (based on 31,654 students) whereby international students brought £34 million of this total. It is clear that Plymouth's economy can benefit substantially from HEI's in terms of direct and indirect job creation and student, staff and visitor expenditure in the city.

The higher education sector is a highly competitive market. Our HEI's compete for students on a national and international scale. It is essential for the competitiveness of our HEI's and the welfare of the students that a suitable range of high quality and affordable accommodation is on offer. More generally, the provision of student accommodation plays an important role in the regeneration of the City Centre, increasing its residential population, bringing vacant sites into productive use and in

many cases delivering ground floor uses which contribute positively to the vibrancy and life of the City Centre. In addition, student accommodation can bring real benefits to local communities including social benefits that bring with them significant spending power that can have a genuine impact on the local economy; sustaining local businesses, employing local residents and ensuring neighbourhood sustainability.

Plymouth’s Student Population

Plymouth University is the largest HEI in the city and makes the most significant contribution to Plymouth’s student population and generates the highest demand for student bed spaces.

Since 2010/11, the number of students enrolling at Plymouth University has consistently declined from 32,100 to 20,871 in 2015/16, which is a reduction of almost 35%. The most significant decline in student enrolments occurred last year in the academic year 2015/16 with a reduction of nearly 20% (19.7%).

Plymouth University Academic Year	Total Enrolments	% change from previous year
2010/11	32,100	n/a
2011/12	30,679	- 4.4
2012/13	28,308	-7.7
2013/14	27,024	-4.5
2014/15	25,991	-3.8
2015/16	20,871	-19.7

Table 1: Plymouth University enrolments by academic year from 2010-2015.

Plymouth University has projected that their student enrolments will remain stable over future years.

Similarly, the University of St Mark and St John has experienced a steady decline in student enrolment numbers over the same period of time from 2010-2016 with the most significant decline in the academic year 2014/15 (-12.4%).

University of St Mark & St John Academic Year	Total Enrolments	% change from previous year
2010/11	2,645	n/a
2011/12	2,671	-1.0
2012/13	2,541	-4.9
2013/14	2,427	-4.5
2014/15	2,125	-12.4
2015/16	2,046	-3.7

Table 2: University of St Mark & St John enrolments by academic year from 2010-2015.

In September 2017, the University of St Mark and St John had approximately 1,800 students on campus and projected that over the next 10 years, student enrolments could double to 3,600 students.

Plymouth College of Art Academic Year	Total Higher Education Enrolments	% change from previous year
2010/11	770	n/a
2011/12	790	+2.6
2012/13	930	+17.7
2013/14	960	+3.2
2014/15	975	+1.6
2015/16	1160	+19

Table 3: Plymouth College of Art higher education enrolments by academic year from 2010-2015.

Table 3 shows that student higher education enrolment numbers at Plymouth College of Art have steadily increased since 2010 and the trend has continued this year with 1,800 students enrolled on campus in September 2017. The current number of full time undergraduates enrolled this academic year 2016/17 is 1,230 of which 460 are first year full time students. Plymouth College of Art project that within the next 5 years student enrolments could increase by 4-500.

Student Accommodation Demand

It is difficult to accurately determine the current level of ‘need’ for PBSA in Plymouth, only an approximate estimate can be provided as need is influenced by a number of complex and variable factors, including propensity to live in halls of residence; the number of ‘international students’ which often choose PBSA; and the quality and price of accommodation available.

In the academic year 2015/16, there were almost 25,000 students enrolled at HEIs in Plymouth, whereby approximately 18,500 were studying full time. Approximately 3,500 students were undergraduates in their first academic year of study at Plymouth University and 586 were first year undergraduates at the University of St Mark and St John.

First year students are considered to have the greatest need for PBSA and when studying away from home, Plymouth University actively encourage these more vulnerable students to live in managed PBSA and provide a commitment that all first year students will have access to PBSA when studying in the City. It is important that we meet the accommodation needs of these students for their welfare and to ensure our HEIs can flourish and continue to positively contribute to Plymouth’s economy. At present, there are a sufficient number of rooms available in PBSA to accommodate the needs of all first year students enrolled in the City’s HEIs.

Typically, students are less likely to remain in PBSA after their first year of study; this pattern of behaviour is influenced by a number of factors including accommodation costs, location, quality, independence, friendship group influences and contract flexibility. These factors combined with the abundance of bedrooms on offer to students in the City often mean students have a wide range of rooms available to choose from that will meet their individual needs.

All students will have an accommodation need, although not all students will have an interest or need to live in PBSA, shared forms of accommodation, for example, are thought to be the preference of many part-time and post graduate students.

A proportion of students will live at home or with relatives and friends that are not student peers. Plymouth University currently estimates that approximately 20% of their first year students will live at their home address (approximately 1,000 students). Comparatively, Plymouth College of Arts estimates that a significant proportion of their students aged 16-19 will live at home or have a local address during their enrolment at the college.

Choice of Accommodation

Students want a range of housing options and their choices are influenced by a number of dynamic and inter-related factors. Meeting the demands of the student is not just about the number of units in the City, it is about quality, choice and diversity. When choosing accommodation student decisions can be influenced by course year, cost, quality, facilities, accommodation type and location.

Student Accommodation Supply

I. Purpose Built Student Accommodation and Student Halls

In recent years, there has been an increasing interest from private investors and developers in building and managing Purpose Built Student Accommodation (PBSA) in university towns and cities across the country. This is as a result of the high returns on investment offered. Annual reports on the sector continue to promote this as a profitable sector and reports forecast that over the next few years, investment and the delivery of PBSA will continue. It is generally accepted this is part of the natural development cycle and new build interest of this residential form is likely to lessen in the future.

There are a significant number of bed spaces available for student use in Plymouth. In purpose built student accommodation and student halls there are an estimated 5,420 bed spaces. In addition, there are currently 1,281 bed spaces under construction and a further 1,048 planned bed spaces in the pipeline that have extant planning permission. If all planning applications are delivered, there will be a total of 7,749 bed spaces available for student use in PBSA and halls of residence.

	Bed Spaces	Running Total
Existing Accommodation	5,420	6,701
Under Construction	1,281	
Consent Granted	1,048	7,749
Current Applications (24/01/17)	0	7,749

Table 2: Overview of the supply and planned provision of Purpose Built Student Accommodation and Student Halls in Plymouth (as of 30/01/2017).

Although there has been significant interest in providing PBSA in Plymouth over the last decade, a proportion of planning permissions have lapsed. Since 2006, for example, 1,348 PBSA and student halls bed spaces were not delivered and the planning consent was not implemented; this constitutes one third of all planning applications for this residential use type.

	Bed Spaces	Percentage Rate
Total student bed spaces approved since April 2006 in PBSA and Halls of Residence	4,051	33.3%
Lapsed Applications for PBSA and Halls of Residence since April 2006	1,348	

Table 3: Lapsed Planning Permission for Purpose Built Student Accommodation and Student Halls of residence in Plymouth since 2006 (as of 30/01/2017).

Occupancy Levels and Pricing Strategies

The number of students residing in PBSA and student halls throughout the academic year is variable and can be influenced by a number of key factors, many of which are identified above in the section entitled 'Choice of accommodation'.

At present, it is estimated that smaller purpose built student halls have very high occupancy levels in the region of 90-100% and larger purpose built properties are 70-80% occupied. As this information may be considered commercially sensitive, it is difficult to verify these assumptions with property management companies that are in direct competition with one another.

The cost of living in PBSA and student halls can vary significantly depending on a number of influential factors including the quality of accommodation, location, views, facilities, occupancy levels etc. and weekly prices can range from £85 to £215 per week.

2. House in Multiple Occupancy

A house in multiple occupation (HMO) is a property rented out by at least three people who are not from one 'household' (e.g. a family) but share facilities like the bathroom and kitchen.

Houses in Multiple Occupation (HMOs) can make a valuable contribution to the private rented housing stock. They provide an affordable type of accommodation and contribute to the mix of housing types and tenures available in Plymouth. They are often suited to young and single people, including students, and those on low incomes. However, HMOs can have a detrimental impact on residential character and community cohesion and high concentrations within neighbourhoods can result in harmful impacts including:

1. Imbalanced and unsustainable communities;
2. Pressure upon local community facilities;
3. Negative impacts on the physical environment and streetscape;
4. Anti-social behaviour, increased levels of crime, noise and disturbance;
5. Issues with parking provision and traffic congestion;
6. Community tensions and lack of cohesion.

Large HMOs

A license is required for large HMO's in Plymouth and is issued by the Council for properties that meet all of the following criteria:

- are rented to 5 or more people who form more than 1 household;
- are at least 3 storeys high; and/or
- have tenants that share toilet, bathroom or kitchen facilities

In January 2017, there were 771 HMO licensed properties in Plymouth. 765 (99%) of these properties were located in central neighbourhoods within the Article 4 area and 512 (66%) licensed properties were occupied exclusively by students.

Article 4 Direction

In 2012, an Article 4 Direction was enforced across a number of centrally located neighbourhoods in Plymouth. The Direction sought to address concerns about the over-concentration of HMOs and removed permitted development rights to change a

dwelling house in to a HMO; such changes of use have since required planning permission.

Since this change of use has been brought under the control of the Council, fewer new large HMOs have become available for student occupation in the City. Council tax records show that a number of properties that were student HMOs are no longer occupied exclusively by students and may have been converted back to family dwellings. Accurately capturing this evidence, however, is challenging and would include extensive resources to investigate a significant number of properties on a regular basis.

It is of note that HMOs can be converted back to family homes without planning permission and small HMOs with up to four occupants do not require planning permission in any part of the city. Currently, it is not possible to quantify these properties nor their occupancy levels as the data is not attainable without significant time and resources. Due to the transient nature of the student population, student residency can be changeable throughout the year and is therefore challenging to audit.

Council Tax – Student Discount

A full Council Tax bill is based on at least two adults living in a home and these occupants are responsible for paying the bill. If the property is rented to several people as a HMO, the landlord is responsible for paying the Council Tax bill.

Applications for a reduction in Council Tax can be submitted to the Local Authority where one or more occupants of the property are full-time students. If all occupants of a property are full-time students, the property can be registered for a full Council Tax exemption. In order to qualify a student must satisfy one or more of the following criteria:

- attending a university or college course which lasts at least one academic year, takes at least 24 weeks a year and involves at least 21 hours of study a week when in attendance;
- under 20 years of age, studying for more than three months and at least 12 hours a week for a qualification up to A Level (if you leave after 1 May, we will not count you until the following 1 November);
- a student nurse on a university course;
- a foreign language assistant registered with the Central Bureau for Educational Visits and Exchanges;
- a non-British spouse or dependent of a student and you are prevented by the terms of UK entry from taking paid employment or from claiming benefits.

As part of the Council Tax reduction/exemption application process, evidence for each student occupant needs to be provided. The Council Tax team have access to HEI enrolment information and will validate the evidence provided on an annual basis. HMOs that are occupied exclusively by students are categorised as 'N' on the Council Tax database.

Category N Exempt Properties						
	Gross Total April 1 st	Annual Properties removed from register	Annual Properties Added to register	Balance for new year	Net Change in Property registrations	
Year 2014/15	3373	-872	+681	3182	-191	Net total Category N registration reductions from 2014/15 to 2015/16 -514
Year 2015/16	3182	-1032	+709	2859	-323	
Year 2016/17	2859	Data Available April 2017				

Table 4: Council Tax Properties occupied exclusively by students ‘Category N’ (excluding large scale PBSA).

Table 4 provides a snapshot of the Council Tax register recorded on April 1st each year. In particular, it shows the number of properties registered on the Council Tax database exclusively occupied by students has steadily decreased over the last three years from 3,373 in 2014/15 to 2,859 in 2016/17 (a reduction of approximately 15%), the decline in the number of Category N registrations corresponds with the steady decline in Plymouth’s student population.

Cumulatively, between 2014-2016 there has been a total net reduction of 514 properties from the Council Tax Category N register.

This information is currently being interrogated further to gain a better understanding as to why a significant number of properties are added to the Category N exemption Council Tax register and a significant number of properties are removed from the register each year. It is possible that properties are not occupied exclusively by students resulting in a re-categorisation, or properties may be empty, under refurbishment or redeveloped, therefore, such properties are not necessarily being released for market housing.

It is of note that Council Tax data is fluid and changeable. Council Tax exemptions can expire or can be modified and new applications can be processed on a daily basis. It is the responsibility of the landlord to inform the Council Tax department if circumstances change regarding the occupancy of properties.

It is unlikely that all of these properties that are no longer a Category N are occupied exclusively by non-students e.g. if a property is exclusively occupied by students and one student stops studying, but continues to live at the property, the landlord is required to notify the Council Tax Office and this would result in the re-categorisation of the property from its former N status. If the student recommenced their education and the property became exclusively occupied by students again, the Council Tax register could be amended to categorise the property as an N exemption once again – at no time has this property been released for market housing.

Plymouth's Housing Requirements (5 year land supply)

National Planning Policy Guidance considers that it is appropriate to include student accommodation towards the city's housing requirement and clarifies the following:

'How should local planning authorities deal with student housing?

All student accommodation, whether it consists of communal halls of residence or self-contained dwellings, and whether or not it is on campus, can be included towards the housing requirement, based on the amount of accommodation it releases in the housing market. Notwithstanding, local authorities should take steps to avoid double-counting.'

Having regard to the above guidance, a calculation to determine the likely number of dwellings that are released to the housing market resulting from the delivery of Purpose Built Student Accommodation has been devised to help inform housing land availability projections. The calculation is based on a number of assumptions that will be explained for transparency and to assist understanding.

Number of properties 100% student occupied (01/04/16): **2,859 (A)**

Licensed HMO properties 100% student occupied (03/01/17): **512 (B)** offering a bed space total of **3,796 (BI)**

(A) – (B) = (C) Total number of properties with <5 student occupants **2,347**

**Working with the assumption 3 students reside in each property:*

(C) x 3 = 7,041 (CI) people/bed spaces in students exclusive properties

(BI) + (CI) = 10,837 (D) student exclusive properties bed space total

(D) / (A) = 3.79 (E) bed space/ students per HMO ratio

Future Projections

PBSA bed spaces **Under Construction as of April 2016 1,202**

***Working with the assumption there is an occupancy rate of 75% for large scale developments and an occupancy rate of 95% for small scale developments*

**** 901 (F)** bed spaces will be occupied by students once completed

517 estimated occupancy by September 2017 (01/04/17 – 31/03/18 financial year)

384 estimated occupancy by September 2018 (01/04/18 – 31/03/19 financial year)

(F) / (E) = 237.73 (G) properties currently occupied by 100% students could be released to the housing market.

136.41 properties released to the open market from 01/04/17 – 31/03/18

101.32 properties released to the open market from 01/04/18 – 31/03/19

PBSA bed spaces **with Extant Planning Permission as of April 2016 1,121**

**** 874 (H)** bed spaces will be occupied by students once completed.

(H) / (E) = 230.61 (I) properties currently occupied by 100% students that could be released to the housing market if all extant planning permissions are delivered.

****Working with the assumption that 50% of planning permissions for PBSA could lapse and will not be delivered.*

*****50% of (I) = 115.30 (J)**

(I) + (J) = 318.21 properties currently occupied by 100% students that could be released to the housing market.

FIGURE I: Predicted release of market housing from delivery of PBSA from 2016

Assumptions for workings in FIGURE 1:

(Note: to be read in conjunction with Appendices)

Developments commenced: 31/03/15-01/04/16

Beckley Court

Royal Insurance Building

Tamar House

Land off Beaumont Rd

Crescent Point

Former Eye Infirmary

Developments commenced: 31/03/16- 01/04/17

Former Comet

Extant Planning Permissions: at 01/04/16

(1,121 bed spaces, 874 estimated occupied)

Former Comet

50 Ebrington Street

Former Derry's

Mayflower House

Belgrave Snooker Club

47a North Road East

Appendix I – Policy for the Joint Local Plan

The Joint Local Plan identifies a number of sites where the principle of delivering student accommodation would be considered acceptable as part of a wider mixed use regeneration scheme, sites include land at Mayflower Street East (Policy PLY9), the Railway Station (Policy PLY16), Plymouth University and Plymouth College of Art campuses (Policy PLY17), Plymouth History Centre and land at Tavistock Place/Chapel Street (Policy PLY18) and Derriford's new commercial centre (Policy PLY38).

Through the JLP, measures have been put in place to control the number of properties converting into larger homes in multiple occupation (HMO) within central city neighbourhoods Policy DEV11. In addition, a more stringent criteria based approach to purpose built student accommodation is set out within Policy DEV12. Both of these policies will impact upon Plymouth's future student accommodation offer and are cited below for ease of reference.

Policy DEV11

Houses in Multiple Occupation in the Plymouth Article 4 Direction Area

In order to support mixed and balanced communities and to ensure a range of housing needs continue to be accommodated in Plymouth's Article 4 Direction

Area, the LPA will not support applications for Homes in Multiple Occupation unless:

1. The proportion of dwelling units in multiple occupation (including the proposed site) does not exceed 10% of the total dwelling stock within 100 metres of the application site.
2. The application site does not sandwich a C3 dwelling unit between two HMO properties.

Houses in Multiple Occupation (HMOs) can make a valuable contribution to the private rented housing stock. They provide an affordable type of accommodation and contribute to the mix of housing types and tenures available in Plymouth. They are often suited to young and single people, including students, and those on low incomes. However, HMOs can have a detrimental impact on residential character and community cohesion and high concentrations within neighbourhoods can result in harmful impacts including:

1. Imbalanced and unsustainable communities;
2. Pressure upon local community facilities;
3. Negative impacts on the physical environment and streetscape;
4. Anti-social behaviour, increased levels of crime, noise and disturbance;
5. Issues with parking provision and traffic congestion;
6. Community tensions and lack of cohesion.

Neighbourhoods situated close to Plymouth's higher education institutes, such as Mutley, Greenbank and Pennycomequick have a significant proportion of student occupied HMOs that emerged as a consequence of exponential student population

growth; when accommodation needs grew faster than the corresponding purpose built accommodation supply. The private sector responded positively to the increasing demand for student accommodation, which led to the significant conversion of family housing to student occupied HMOs. The uneven distribution of student occupied houses and other HMOs, however, has put pressure on Plymouth's housing stock and the transient nature of students has also changed the character of local services and community facilities.

In 2012, an Article 4 Direction was enforced by the City Council across a number of centrally located neighbourhoods in the city. The Direction sought to address concerns about the over concentration of HMOs and removed permitted development rights to change a dwelling house in to a large HMO; such changes of use have subsequently required planning permission. Since this change of use has been brought under the control of the City Council, fewer new large HMOs have become available for student occupation in the city.

Council tax records show that there are currently 2,859 properties in Plymouth that are occupied exclusively by students (Council Tax records November 2016) and many of these properties include large HMOs that are located a short distance from the city's main education campus. In January 2017, there were over 770 licensed HMOs (properties that are occupied by 5 or more people in two or more households or properties that include 3 habitable storeys) in Plymouth with 99% of these located in the Article 4 Direction Area.

Although it is mandatory to register large HMOs, the type of housing data available to the City Council is restricted, resources are limited and the housing market remains fluid, which means it is not possible to identify every HMO in the city.

Using Council Tax data and licensing information, however, the City Council considers there to be a need to continue managing the supply of new large HMOs to avoid high concentrations of non-family dwellings that can create community imbalance and put pressure on the city's housing stock and community infrastructure.

Policy DEV12

Purpose built student accommodation in the Plymouth Policy Area

The provision of purpose built student accommodation in the Plymouth Policy Area will not be supported unless the following criteria can be adequately addressed:

1. The development meets an identified need for the type of accommodation proposed.
2. The development is in an appropriate location, which is easily accessible to university/college facilities by sustainable travel modes.
3. The proposal does not result in an excessive concentration of student accommodation in one locality.
4. The proposal does not result in a harmful loss of an existing use.
5. The layout, design and facilities provided within the development is of a high standard and meet identified student needs including adequate laundry provisions, communal space and social learning facilities.

6. The development does not conflict with adjacent uses or the general amenity of the surrounding area.
7. Appropriate management plans are submitted ensuring that a positive and safe living environment is created for students and to minimise the potential negative impacts on the local community.
8. Detailed arrivals plans are submitted ensuring that adequate facilities are in place to accommodate vehicular movements in particular at the start and end of terms.
9. All proposals are future proofed in terms of design to support potential alternative uses as appropriate.

The education economy is of significant importance to Plymouth. The city hosts three major Higher Education Institutes (HEI) including Plymouth University, the University of St Mark and St John and Plymouth College of Art.

In total, there are some 25,500 students currently enrolled at HEIs in Plymouth, of which 18,500 are studying full time. Approximately 3,500 students are undergraduates in their first academic year of study at Plymouth University. First year students are considered to have the greatest need for Purpose Built Student Accommodation (PBSA). However, it is also important to allow for overseas students and students in and beyond their second year. This is particularly important given the problems caused by a proliferation of student HMOs. Plymouth University actively encourages these more vulnerable students to live in managed PBSA and provide a commitment that all first year students will have access to PBSA when studying in the city. It is important that we meet the accommodation needs of these students for their welfare and to ensure our HEIs can flourish and continue to positively contribute to Plymouth's economy.

At present, there is a sufficient number of rooms available in PBSA to accommodate the needs of all first year students enrolled in the city's HEIs. There are approximately 5,420 bed spaces in large-scale operational PBSA and student halls in Plymouth. A significant number of students live in this accommodation type. However, not all of these bed spaces are restricted to student use and can be occupied by a proportion of key workers. The pipeline supply of PBSA is set to increase in Plymouth; in January 2017 there were 1,281 bed spaces under construction with 1,048 further bed spaces with extant planning consent. If all of these bed spaces are delivered, there will be a total of more than 7,749 bed spaces in PBSA – which is an increase of more than 40% on the current number of bed spaces available at present.

The policy responds to the following issues:

- The need to prevent an over-supply of PBSA, especially where vacant PBSA is not flexible enough to be used to serve another housing or economic need.
- The need to prevent an over-proliferation of PBSA, leading to unbalanced communities.
- The need to protect residential amenity and the supply of family homes.

However, it also recognises there is a need to provide accommodation for students and it is preferable that student needs are met as far as possible in PBSA because it can:

- Reduce the need to convert more housing that is currently available for families and other non-student resident use.
- Create sustainable locations for student accommodation which reduces the need to travel in areas that serve the needs of students.
- Provide a stock of well-managed, secure and regulated environments that will minimise the impact on amenity for other households in residential neighbourhoods.

The policy approach therefore applies a series of tests to ensure that when a scheme is to be approved it is responding to a clear need, it is appropriately located and does not lead to over-concentration of student developments, it serves wider regeneration and planning purposes, it has appropriate management in place, and it is future proofed. The Plymouth Plan SPD will amplify the policy in more detail.

**Appendix 2
Student Accommodation Sites Under Construction as of 30 January 2017**

Development Site	Bed spaces	Application Number(s)	
Beckley Court	507	15/01143/FUL	Commenced prior to April 2016 Total 1,202 bed spaces
Royal Insurance Building St Andrews Cross (First, second, third & fourth floor).	82	15/00408/FUL 15/01225/FUL	
Tamar House, St Andrews Cross	56	14/01781/FUL	
Land off Beaumont Rd	45	11/00577/FUL	
Crescent Point	348	14/01264/FUL	
Former Eye Infirmary	164	14/01228/FUL	
Former Comet Mayflower Street	79	15/02184/FUL	
	Total 1,281		

**Appendix 3
Student Accommodation Sites with Planning Permission not commenced as
of 30 January 2017**

Development Site	Bed spaces	Application Number and Expiry Date
Former Derry's Non-material amendment app. 2 year implementation	500 462	(16/00030/FUL) (16/01572/AMD) (Exp. 02/08/18)
Mayflower House 2 year implementation	490	(15/01622/FUL) (Exp. 22/04/18)
Belgrave Snooker Club 2 year implementation	43	(15/02137/FUL) (Exp. 18/08/18)
47a North Road East 3 year implementation	39	(15/01251/FUL) (Exp. 26/05/19)
Bedford Villa, Amity Place	6	14/01095/FUL
50 Ebrington Street	8	15/00424/FUL
	Total 1,048	

**Appendix 4
Future Student Accommodation Sites Estimated Completion Dates and
Projected Occupancy Levels as of 30 January 2017**

Development Site	Bed spaces	Approximate Estimated Occupancy Levels	Estimated Completion by	Commenced
Beckley Court 15/01143/FUL	507	75% 380 bed spaces	09/2017	31/03/15-01/04/16
Royal Insurance Building St Andrews Cross (First, second, third & fourth floor). 15/00408/FUL, 15/01225/FUL	82	95% 61 bed spaces	09/2017	31/03/15-01/04/16
Tamar House, St Andrews Cross 14/01781/FUL	56	95% 42 bed spaces	09/2017	31/03/15-01/04/16
Land off Beaumont Rd 11/00577/FUL	45	95% 34 bed spaces	09/2017	31/03/15-01/04/16
Former Comet Mayflower Street 15/02184/FUL	79	95% 75 bed spaces	09/2017	31/03/16- 01/04/17
Bedford Villa, Amity Place 14/01095/FUL	6	95% 6 bed spaces	09/2017	Not Commenced
Crescent Point 14/01264/FUL	348	75% 261 bed spaces	09/2018	31/03/15-01/04/16
Former Eye Infirmary 14/01228/FUL	164	75% 123 bed spaces	09/2018	31/03/15-01/04/16
50 Ebrington Street 15/00424/FUL	8	95% 8 bed spaces	09/2018	Not Commenced
Former Derry's	462	75% 346 bed spaces	09/2020	Not Commenced
Mayflower House	490	75% 367 bed spaces	09/2020	Not Commenced

Belgrave Snooker Club	43	95% 41 bed spaces	09/2020	Not Commenced
47a North Road East	39	95% 37 bed spaces	09/2020	Not Commenced

Assumptions:

Projected occupancy levels based on anecdotal evidence from Plymouth University (January 2017):

≤100 bed spaces, small scale development & estimated 95% occupancy level

>100 bed spaces, large scale development & estimated 75% occupancy level

Completion dates case officer knowledge or 2 years post expiry date of the planning application.

Appendix 5

Estimated number of dwellings released to the open market following the delivery of PBSA during the plan period 2016 – 2034 as of 30 January 2017

Development Site	Bed spaces	Estimated completion date	Estimated occupancy level	Divide by 3.79 (equivalent dwelling release)	Housing Trajectory Year
Crescent Point	348	09/18	75% 261 bed spaces	69	2019/20
Beckley Court	507	09/17	75% 380 bed spaces	101	2018/19
The Eye Infirmary	164	09/18	75% 123 bed spaces	33	2019/20
Former Comet	79	09/17	95% 75 bed spaces	20	2018/19
Royal House	7	19/18	75% 5 bed spaces	1	2021/22

Year	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Annual estimated dwellings released to the open from the delivery & occupancy of PBSA			121	103		1



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