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## Student Accommodation - Sheraton Park Durham

### Alumno Developments

#### Study of Need



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## 1. Executive Summary

### Key Points

- The numbers of full-time students at Durham University have increased by 39% since 2000/01 and currently stand at almost 15,000. Growth in student numbers is continuing at Durham with the number of full-time students rising by 1.4% between 2011/12 and 2012/13 at the same as total numbers across the UK fell by 2.3%.
- The University envisages further growth in student numbers with an increase of 700 students by 2015 and 2,000 by 2020 with the focus being on overseas students and those studying at a postgraduate, doctoral and post-doctoral level.
- The futures of the City of Durham and Durham University are closely bound together. Durham needs the university, students in Higher Education and graduates to contribute to creating a high-quality local workforce which can compete effectively in an increasingly knowledge-based economy. The University is seeking to expand further in particular in terms of numbers of overseas students and those participating in post first degree study and research.
- Durham University is currently able to accommodate under two-fifths (38%) of its 13,000 Durham-based students in college accommodation.
- In addition to existing purpose-built accommodation, the 112 bedspace Elvet Studios development has opened in September 2013. Planning approval has been granted for five developments totalling up to 1,600 bedspaces and planning applications have been submitted for a further two developments which total 490 bedspaces.
- If all of the developments which have been constructed or have received planning permission are constructed, the total bedspaces available will rise to 6,712, a level of provision of 52% of full-time students studying in the City of Durham itself at current levels. If developments which are pending consideration are included, the total bedspaces available would rise to 7,202 an overall level of provision of 55%.
- Census data demonstrates that the proportion of full-time students who can be housed in university residential accommodation in Durham fell sharply between 2001 and 2011. This has occurred owing to the far greater rate of increase in student numbers than the increase in provision of residential accommodation for them.
- At the time of the 2001 census, approximately 4,000 of the full-time students studying in the City of Durham were not housed in purpose-built accommodation. The current number that cannot be accommodated is 8,000. If all of the student accommodation pipeline (of up to 2,200 bedspaces) were constructed, 5,800 students (at current levels) could not be housed in purpose-built accommodation; this level is almost 2,000 higher than in 2001.
- The numbers of students living in student only households in Durham has almost doubled between 2001 and 2011 and at the same time there has been a sharp increase in the proportion of residents living in private rented households as homes and other accommodation has been converted into rented housing for students.
- These factors point strongly to a need to increase the provision of purpose built student accommodation in Durham which can begin to relieve some of the pressures of these increasing student numbers in particular areas.
- The close proximity of the Sheraton Park site and its short journey distances to the colleges based around South Road and those situated on the Peninsula mark it out as a good location for student accommodation.

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### **Higher Education Institutions and Durham**

- The number of students in full-time higher education in Durham has grown steadily in the past decade. The number of full-time undergraduates at Durham University has increased by 28% between 2000/01 and 2011/12 and currently stands at more than 11,500; the numbers of postgraduates have increased by 108% over the same period and currently stand at more than 3,000. If the approximately 500 students in higher education at New College Durham are included, total full-time student numbers in Durham exceed 15,250. Durham has the largest proportion of residents who are HE students of any town or city in England (33.8% - Cambridge is second highest with 33.5%) and is second only to St Andrews (48.4%) in the UK.
- Growth in student numbers at Durham University continues to be strong with the number of full-time students rising by 1.4% between 2011/12 and 2012/13 (from 14,790 to 14,990) at the same as total numbers across the UK fell by 2.3%.
- Rates of growth in numbers of overseas students have been far greater than those seen amongst UK students and exceed rates seen elsewhere. The proportion of overseas students at Durham University has increased from 12.1% in 2002/03 to 22.5% in 2011/12. The numbers of these international students have doubled from 1,860 in 2002/03 to 3,720 in 2011/12. This compares to an overall increase of 53% in numbers of overseas students over this period across England.
- After a dip in the overall number of students in England between 2010/11 and 2011/12 (which was not observed for Durham University where numbers continued to grow) applications for the 2013/14 academic year have seen an increase which in part makes up for the previous decline. Overall, therefore, across England universities, the decline in applications and student numbers which accompanied the introduction of the higher tuition fees may have been limited in its impact.
- Both Durham University and the City of Durham see their futures as closely aligned and interwoven. As a city Durham is seeking further growth and has a strategy which takes advantage of the benefits of a more knowledge-based economy and more specifically one that is based around research and development through the Durham University Science Park and the NETPark based nearby at Sedgefield. The city recognises that the University is a key component in driving growth for the area not only by creating jobs but also through improving skill levels in the workforce and helping retain graduates in the local area.
- Durham University itself envisages further growth in student numbers in the period to 2020. This will be driven less by increases in home undergraduates but more by overseas students and those studying at a postgraduate, doctoral and post-doctoral level. Its 2011 assessment was of a growth from its 2011 base of 15,000 students of 700 students by 2015 and 2,000 by 2020.

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### Provision of Student Accommodation

- Accommodation policy is set at a university and a college level. Durham University envisages that undergraduates will live in college accommodation in their first year and may choose to return in subsequent years (often after living out in their second year). The individual colleges often have a stated aim of housing first year students in college accommodation and also of being able to house those in their final undergraduate year in the college.
- In total, Durham University provides some 5,400 bedspaces in college accommodation for its 14,800 full-time students. It is important to note that the Durham University has a campus of almost 2,000 students based in Stockton-on-Tees which has accommodation for some 850 students. In the City of Durham, Durham University has almost 13,000 students of whom around 38% (5,000) have college-based accommodation.
- Planning Pipeline.** In addition to purpose-built accommodation from the University, the Elvet Studios development of 112 bedspaces opened in September 2013. Planning approval has been granted for five other developments of student accommodation in and around the city which, if constructed, would deliver up to 1,600 bedspaces. Of these three are major developments:
  - January 2014, approval was given to the Renny’s Lane development of 350 rooms.
  - February 2013, an outline planning application was approved for the development of residential accommodation for 1,000 students on the site of the Mount Oswald Golf Course.
  - December 2012, approval was given for the development of 223 bedspaces close to the city centre in Ainsley St.
- In addition to these approvals, planning applications have been made for a two other developments which total 490 bedspaces (Three Tuns Hotel (50) and County Hospital (440)).
- The impact on provision of the developments in the planning pipeline are summarised as follows for the City of Durham.

	A. Current Position	B. Current Position Plus Planning Pipeline (private development recently completed ONLY)	C. Current Position Plus Planning Pipeline (recently completed and planning approved)	D. Current Position Plus Full Planning Pipeline (recently completed, planning approved and pending consideration)
Total FT Students	13,000	13,000	13,000	13,000
Total Available Bedspaces	5,000	5,112	6,712	7,202
Gap – Number of Bedspaces	8,000	7,888	6,288	5,798
<b>% Resulting Level of Provision for FT Students</b>	<b>38.5%</b>	<b>39.3%</b>	<b>51.6%</b>	<b>55.4%</b>

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- If all of the developments which have been constructed or have received planning permission are constructed, the total number of bedspaces available will rise to 6,712, a level of provision of 52% of the full-time students studying in the City of Durham itself (based on current student numbers). If developments which are pending consideration are included, the total bedspaces available would rise to 7,202, an overall level of provision of 55%.
- Even with the construction of all of the bedspaces in the planning pipeline the gap in the volume of purpose-built student accommodation in the City of Durham remains far higher than it was a decade ago. At the time of the 2001 census, approximately 4,000 of the full-time students studying in the City of Durham were not housed in purpose-built accommodation. Currently almost 8,000 students are unable to be housed in purpose-built accommodation. If the entire student accommodation pipeline (of up to 2,200 bedspaces) is constructed, it will not be possible to house 5,800 students (at current levels) in purpose-built accommodation; this level is almost 2,000 bedspaces higher than in 2001. This is summarised in the table below.

City of Durham ONLY	2001	Current Position	Current PLUS Total Pipeline
Total Full-time Students	8,500	13,000	13,000
Total purpose-built student accommodation	4,500	5,250	7,202
<b>Resulting numbers of students not housed in purpose-built accommodation</b>	<b>4,000</b>	<b>7,750</b>	<b>5,798</b>

### Impact of Student Accommodation on the City of Durham

- Use of census data from 2001 and 2011 provides a more detailed understanding of the impact on Durham of increasing numbers of students over the past decade. Ideally this assessment would be undertaken by ward but data for the Elvet ward is not available for the 2001 census. As a result comparison has been made using three Middle Layer Super Output Areas (MSOAs) which cover the City of Durham which are entitled County Durham 029, 030 and 033. The population of these MSOAs totals 29,000 which is lower than the overall City of Durham population (49,000 in 2010). Analysis by MSOA does, however, give an extremely clear picture of the changes which have occurred.
- Most noticeable is the degree to which the population of the constituent MSOAs in Durham has grown at a far faster rate between 2001 and 2011 than that of the region. Whilst the population of the North East region has grown by 3.2% and that of County Durham has grown by 4.0% the resident population of the Durham MSOAs has increased by 18.9% (more than 4,500 from 24,500 to 29,100). Over the same period the numbers of students living in the Durham MSOAs has increased by 40% rising by 3,400 from 8,500 to 11,900. Full-time students aged 18+ now make up 40.7% of the Durham MSOA population compared to 34.5% in 2001.
- While the census data shows that the numbers of full-time students has increased by this figure of 3,400 students/40% between 2001 and 2011, the numbers of persons living in halls of residence has increased by just 14% or 725 from 5,135 to 5,860. This means that the proportion of students who can be accommodated in university residential accommodation in the three MSOAs has fallen from 61% in 2001 to 50% in 2011.

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- To make up for this shortfall in expansion of purpose built residential accommodation, the numbers of students living in all student households and privately rented property has increased rapidly. In 2001, 2,722 students lived in all student households in the Durham MSOAs; in 2011 this figure had risen by more than 2,000 to 5,047. This rise has mirrored a major shift in the city towards persons living in privately rented households. In 2001, there were 3,900 people living in private rented households in the three MSOAs and they represented 16% of residents; in 2011 this figure had increased by more than almost 4,000 to 7,850 and 27% of residents were living in private rented accommodation.
- By far the greatest increase in student numbers has occurred in just one of the 3 MSOAs (County Durham 030). In this central MSOA, full-time students now represent 72% of all residents (up from 66% in 2011). Whilst the total number of students in this MSOA has risen by 2,200, the provision of Hall of Residence type accommodation has risen by just 600; the numbers living in private rented accommodation has risen by 1,500.

## **Conclusions**

- The use of census data is valuable in uncovering the nature of the pressures which are occurring in Durham in relation to accommodating the student body. Whilst growth in student numbers is important for both the University and the city itself, it has not been matched by a growth in provision of purpose built accommodation for them.
- As a result the capacity of Durham University to accommodate these students has been reduced and, as a result, there have been significant increases in the numbers of students living in student only households and hence private rented accommodation. This increase has not been evenly distributed across the city but has tended to focus on the areas in the immediate vicinity of the University colleges.
- It is important to note that, if left unaddressed, these pressures are likely to increase as Durham University has the capacity to attract high quality students at all levels of higher education as a top 4 UK and top 100 world university.
- There is a clear need for more purpose-built student accommodation which can alleviate the pressure on existing housing in the city. While the Mount Oswald development offers the prospect of significant volumes of student accommodation, outline planning permission alone has been granted and the development is scheduled to be staged over a number of years.
- The growth of student numbers in HE in Durham has been significant over the past decade and has not been matched by growth in college accommodation. This has led to a structural imbalance of housing in the city which non-student residents are all too aware of. There is a need for the development of purpose built student accommodation outside the immediate vicinity of the city centre but still within easy reach of it and the colleges themselves.
- Given the close proximity of the Sheraton Park development to the colleges on both the Peninsula and along South Road, its location is likely to be extremely attractive to students.

## 2. Background

- The main Higher Education (HE) institution based in Durham is Durham University. This report assesses the need for new student accommodation in Durham and the proposed development at the Sheraton Park site with a total of 424 bedspaces.
- It assesses the impact of the accommodation requirements of students at Durham University on the city at present, how those requirements have changed over time and how they are likely to develop in the future.
- In addition to Durham University, HE level study is also undertaken at the New College Durham (founded 1977 - [www.newcollegedurham.ac.uk](http://www.newcollegedurham.ac.uk)) in the form of foundation degrees, honours degrees and professional qualifications. HE student numbers from New College Durham (approximately 500 students) have, however, been omitted from detailed analysis in the report as the total student numbers and their precise structure (in terms of full-time and part-time study etc) are not available to the same level of certainty as for Durham University.
- The report looks at current levels of provision of student accommodation and the impact this has on the city itself.
- The total number of students that has been used in this report varies from that used in the Economic Benefits report. The Economic Benefits report seeks to assess the overall contribution of students (full-time and part-time) in Higher Education to the city whereas the Study of Need focuses principally on the accommodation needs of full-time students.
- The principal sources of data that have been used in this study are from the Higher Education Statistics Authority (HESA)<sup>1</sup>, the Universities & Colleges Admissions Service (UCAS)<sup>2</sup> and the UK Government's Office of National Statistics (ONS) Neighbourhood Statistics<sup>3</sup>.
- These and the all other data sources which have been used in the report are referenced as footnotes.

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<sup>1</sup> <http://www.hesa.ac.uk/content/view/1897/706/>

<sup>2</sup> <http://www.ucas.com>

<sup>3</sup> <http://www.neighbourhood.statistics.gov.uk/dissemination/>

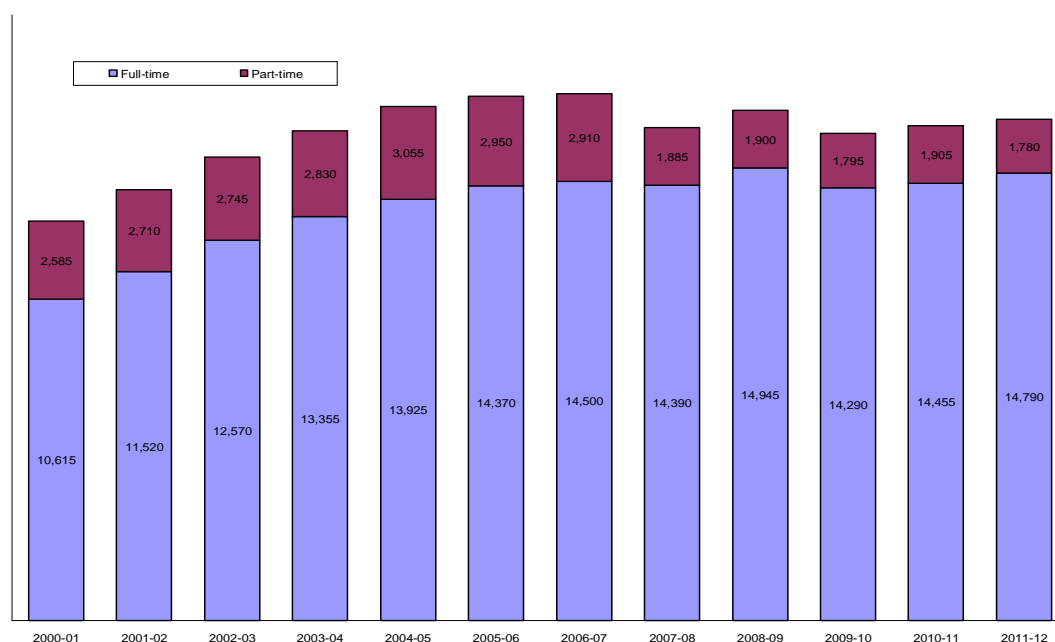


### 3. Student Numbers – Durham University

#### 3.1 Overall Position

- Durham University was founded as Britain’s third university in 1832 but its roots as a centre for theological teaching go back far further to the 8<sup>th</sup> Century AD<sup>4</sup>. The main campus is based in the city of Durham. It has a collegiate system whereby every student (undergraduate or postgraduate) is a member of one of its 16 colleges.
- The University has 14 colleges which are based in the city of Durham (with a total of around 13,000 full-time students) and 2 colleges (with a total of some 2,000 students) at the Queen’s Campus in Stockton in Teesside.
- HESA data shows that there are a total of 16,570 full and part-time students at Durham University. In the period since 2000/01, the total number of students at Durham University has risen by 26% from 13,200 to 16,570 in 2011/12. Growth in student numbers at Durham University continues to be strong with the number of full-time students rising by 1.4% between 2011/12 and 2012/13 (from 14,790 to 14,990) at the same as total numbers across the UK fell by 2.3%.
- As with many universities there has been a shift away from part-time to full-time study. The numbers of full-time students have risen by 39% since 2000/01 while numbers of part-time students have fallen from 2,585 in 2000/01 to 1,780 in 2011/12. Most of the decline in part-time student numbers occurred in the middle of the decade; there was a fall of more than 1,000 part-time students between 2006/07 and 2007/08.

**Chart 1. Total numbers of students (full-time & part-time) at Durham University (HESA)**



<b>Total Students</b>	13,200	14,230	15,315	16,185	16,980	17,320	17,410	16,275	16,845	16,085	16,360	16,570
<b>Year-on-year Ch</b>		7.8%	7.6%	5.7%	4.9%	2.0%	0.5%	-6.5%	3.5%	-4.5%	1.7%	1.3%

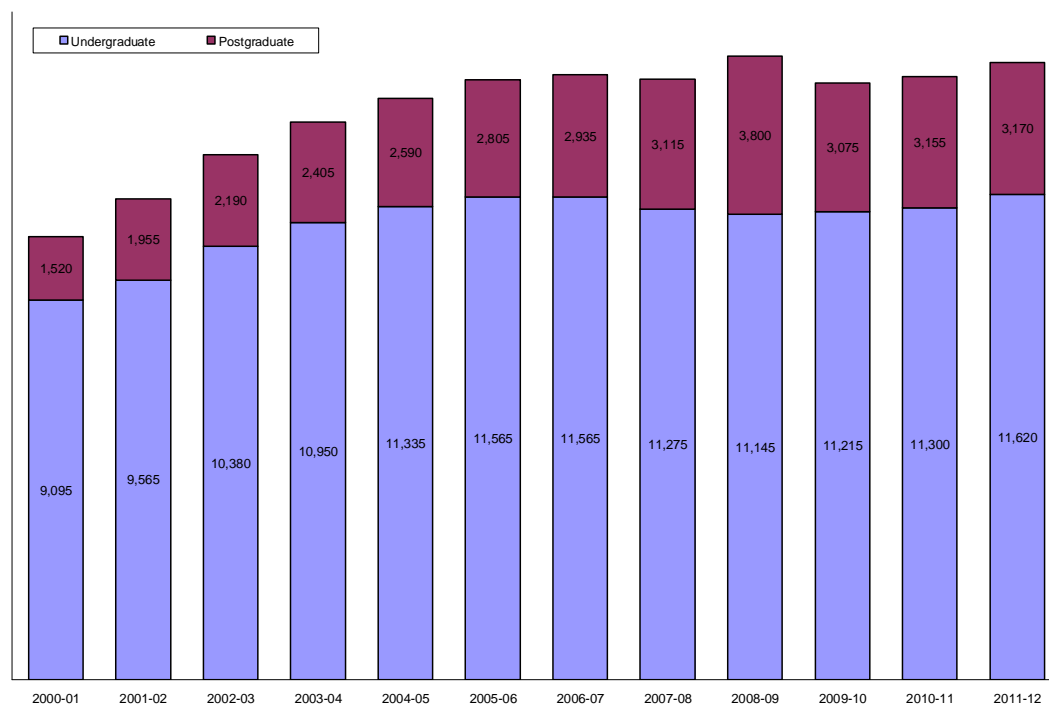
<sup>4</sup> <https://www.dur.ac.uk/about/shaped/>

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- The numbers of both full-time undergraduate and postgraduate students at Durham University have continued to increase in recent years.
- The numbers of full-time undergraduate students have increased by 28% since 2000/01 and now stand at more than 11,500. Numbers of postgraduate students have been more volatile but overall have more than doubled in this period increasing by 108%. The total number of full-time students at Durham University stands at 14,790 in 2011/12.

**Chart 2. Total numbers of full-time students at Durham University by level of study (HESA)**



<b>Total FT Students</b>	<b>10,615</b>	<b>11,520</b>	<b>12,570</b>	<b>13,355</b>	<b>13,925</b>	<b>14,370</b>	<b>14,500</b>	<b>14,390</b>	<b>14,945</b>	<b>14,290</b>	<b>14,455</b>	<b>14,790</b>
<b>Year-on-year Ch</b>		<b>8.5%</b>	<b>9.1%</b>	<b>6.2%</b>	<b>4.3%</b>	<b>3.2%</b>	<b>0.9%</b>	<b>-0.8%</b>	<b>3.9%</b>	<b>-4.4%</b>	<b>1.2%</b>	<b>2.3%</b>

- This rate of increase in numbers of full-time students is marginally lower than the rate of growth that has occurred in the UK, England and across the North East region. Whereas the numbers of full-time students have increased by 42% in the UK and 45% in England, they have increased by 42% in the North East region and 39% in Durham. Growth was particularly rapid in Durham between 2000/01 and 2006/07.

**Table 1. Comparison of growth in numbers of full-time students**

	<b>United Kingdom</b>	<b>England</b>	<b>North East</b>	<b>Durham</b>
2000/2001	1,210,135 (100)	984,135 (100)	54,650 (100)	10,615 (100)
2006/2007	1,451,725 (120)	1,187,660 (121)	71,145 (130)	14,500 (137)
2011/2012	1,721,425 (142)	1,423,880 (145)	77,460 (142)	14,790 (139)

The Index figures in brackets are based on 2000/2001=100.

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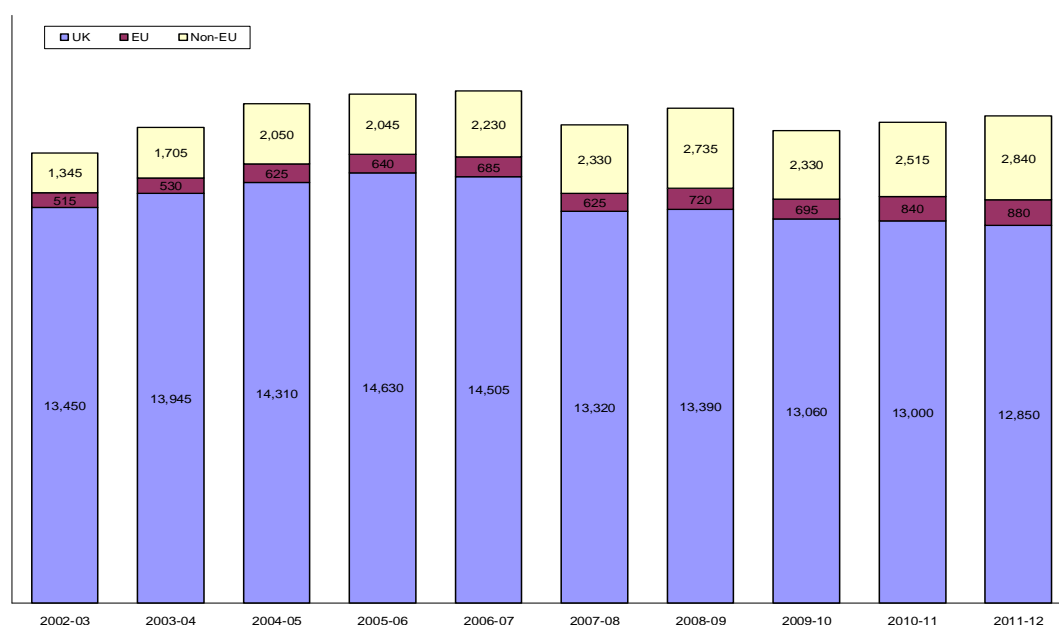
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- HEFCE data<sup>5</sup> shows that in the 2011/12 academic year, there were a total of 529 students in full-time Higher Education learning at New College Durham. Of these 213, were engaged on a Foundation Degree and 316 on an Undergraduate level degree.

### 3.2 Overseas Students

- The total numbers of overseas students at Durham University has doubled from 1,860 in 2002/03 to 3,750 in 2011/12. This is a far greater rate of growth than the increase of 53% in total numbers of overseas students at universities in England over this period. The focus of the growth in overseas students at Durham University has been amongst those from outside the EU whose numbers have increased from 1,345 in 2002/03 to 2,840 in 2011/12 a rate of increase of 111%.

**Chart 3. Structure of students at Durham University by origin (HESA)**



<b>Total Overseas Students</b>	<b>1,860</b>	<b>2,235</b>	<b>2,675</b>	<b>2,685</b>	<b>2,915</b>	<b>2,955</b>	<b>3,455</b>	<b>3,025</b>	<b>3,355</b>	<b>3,720</b>
<b>% Overseas*</b>	<b>12.1%</b>	<b>13.8%</b>	<b>15.8%</b>	<b>15.5%</b>	<b>16.7%</b>	<b>18.2%</b>	<b>20.5%</b>	<b>18.8%</b>	<b>20.5%</b>	<b>22.5%</b>

\*(Other EU and Non-EU) As % of Total HE Students

<sup>5</sup>

<http://www.hefce.ac.uk/media/hefce/content/whatwedo/fundingandinvestment/fundinginstitutions/annualfundingallocations/201213/march/forinstitutions/HESES11-HEIFES11.xls>

### 3.3 Applications

- After the decline in applications to and acceptances at UK Higher Education courses in 2012, the most recent completed cycle of UCAS applications and acceptances (for courses commencing in autumn 2013), indicates that whilst application rates have not completely returned to their previous levels, the number of acceptances now exceeds the previous highest levels of 2011.

**Table 2. UCAS Applicants and acceptances and acceptance rate by domicile at end of the cycle (2007-2013)<sup>6</sup>**

<b>Applicants</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
UK	452,744	501,070	542,913	585,302	587,864	543,339	561,983
EU (excl UK)	33,621	34,530	39,504	47,318	49,275	43,149	44,836
Non-EU	48,130	53,089	57,443	64,731	63,022	67,149	70,554
Total Applicants	534,495	588,689	639,860	697,351	700,161	653,637	677,373
<b>Acceptances</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
UK	363,369	403,857	423,954	423,430	430,068	406,242	433,612
EU (excl UK)	20,661	21,363	23,807	25,607	26,701	23,233	24,508
Non-EU	29,400	31,407	34,093	38,292	35,261	35,435	37,476
Total Accepts	413,430	456,627	481,854	487,329	492,030	464,910	495,596

- The most recent data from UCAS<sup>7</sup> indicates (at a relatively early stage in the cycle) slightly weaker levels of applicants for 2014 commencing courses than in 2013 but stronger demand from non-UK domiciled students.

**Table 3. UCAS: 2014 cycle figures – January 2014. Total applicants for all courses (2010-2014) by domicile of applicant (at the December interim comparison point)**

<b>Applicant Domicile</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
<b>England</b>	258,440	267,070	244,890	229,070	227,850
Northern Ireland	11,160	11,120	10,480	10,530	10,100
Scotland	17,380	14,730	14,620	14,050	14,110
Wales	12,730	12,940	12,700	11,220	11,410
UK	299,700	305,860	282,680	264,860	263,460
EU (excl UK)	14,960	16,140	14,420	14,140	14,370
Non EU	21,100	22,050	24,770	24,790	25,920
<b>Total</b>	<b>335,760</b>	<b>344,050</b>	<b>321,880</b>	<b>303,790</b>	<b>303,750</b>

<sup>6</sup> <http://www.ucas.com/sites/default/files/ucas-2013-end-of-cycle-report.pdf>

<sup>7</sup> <http://www.ucas.com/system/files/2014-ucas-deadline-applicant-statistics-december.pdf>

**Table 4. Percentage cycle to cycle change in numbers of total applicants for all courses (2010-2014) by domicile of applicant (UCAS)**

Applicant Domicile	2011 vs. 2010	2012 vs. 2011	2013 vs. 2012	2014 vs. 2013
UK	2.1%	-7.6%	-6.3%	-0.5%
EU (excl UK)	7.9%	-10.7%	-1.9%	1.6%
Non EU	4.5%	12.3%	0.1%	4.6%
<b>Total</b>	<b>2.5%</b>	<b>-6.4%</b>	<b>-5.6%</b>	<b>0.0%</b>

### 3.4 Students as a Proportion of the Population

- The numbers of students living in Durham as a proportion of the residential population are amongst the highest in the UK and are the highest of any university town in England. The 2010 population estimate for the City of Durham identified a population of 49,000.
- The most recent HESA data identifies a total HE student population of 16,570. This means that more than a third of the city’s population (33.8%) is made up of students. This is slightly higher than the 33.5% for Cambridge and means that Durham has the highest proportion of students of any town/city in England and is surpassed in the UK only by St Andrews where almost half (48.4%) of all residents are students.

**Table 5. Leading towns and cities in the UK in terms of the proportion of residents who are HE level students**

Town/City	Residential Population (Census 2011) <sup>8</sup>	All HE Students (HESA 11/12)	All HE Students as % of pop
St Andrews	17,010	8,240	48.4%
Durham <sup>9</sup>	49,000	16,570	33.8%
Cambridge	123,900	41,550	33.5%
Canterbury	151,200	47,540	31.4%
Oxford	151,900	44,020	29.0%
Stirling	33,710	8,930	26.5%
Preston	140,200	31,530	22.5%
Nottingham	305,700	63,560	20.8%

<sup>8</sup> St Andrews and Stirling Mid-2010 Populations Estimates <http://www.gro-scotland.gov.uk/files2/stats/population-estimates/special-area/settlements-localities2010/2010-settlements-table1.xls>

<sup>9</sup> City population - <http://www.durham.gov.uk/Pages/Service.aspx?ServiceId=5651> (2010 ONS)

## 4 Future Strategies

- Whilst the assessments that are made in this report of provision of student accommodation are based on the current levels of students at Durham University, it is important to highlight the importance which the city and region places on Higher Education and the role of the university to support the drive for economic growth.

### 4.1 Durham as a City

- The City of Durham recognises the importance of the university and its contribution to the future growth contribute to:
  - The economic growth of the city and wider region.
  - Local and regional employment and increasing the skills of the workforce and the move towards a knowledge economy.
  - Securing competitive advantage for the region through the research and development skills. This is exemplified by the Durham University Science Park and the University's close involvement with the nearby development of NETPark, the North East's "most successful" Science Park<sup>10</sup>.
- In the Foreword to the 2004 City of Durham Local Plan<sup>11</sup>, the City underscored the role of the University as an engine room for growth and its contribution to economic prosperity "Our World Heritage site and nationally renowned University give us important assets on which to build to achieve economic well being and secure our futures".
- There was a recognition of the need for the City to accommodate the University's growth in the longer term in order to retain the University as a "major employer", its "considerable contribution to the local economy" and as an "institution of academic excellence which is recognised throughout the country".
- The Plan envisaged that significant further development was likely in the longer-term which planning policy would need to support "further development will be sought in the long-term and this will need to be reflected in the policies of the Plan".
- In the emerging planning policy which is being developed within the National Planning Policy Framework (published in March 2012), Durham County Council is developing its County Durham Plan "which sets out strategic policies to guide where new development is located and will plan for change in the county over the next 20 years<sup>12</sup>." Consultation on the Preferred Options was undertaken during the autumn of 2012.
- A continuing and strong desire to support growth of the University remains. The Spatial Vision For County Durham for 2030 states that "Durham University will continue as a flourishing centre of learning and research and development, having strengthened its links with businesses<sup>13</sup>."
- There is, however, a recognition that this growth will be coupled with an increase in student numbers. It is seen that the numbers of students already has a significant impact on the fabric of the City "accommodating increased student numbers places a considerable burden upon the older housing stock of Durham City's inner urban area and the resulting concentrations of student occupants create tensions among the diminishing non-student resident population."

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<sup>10</sup> [http://www.dur.ac.uk/resources/treasurer/financial\\_statements/FinancialStatements2012Final.pdf](http://www.dur.ac.uk/resources/treasurer/financial_statements/FinancialStatements2012Final.pdf)

<sup>11</sup> <http://www.cartoplus.co.uk/durham/text/00foreword.htm>

<sup>12</sup> <http://www.durham.gov.uk/pages/Service.aspx?ServiceId=599>

<sup>13</sup> County Durham Plan Local Plan Preferred Options (GIS version)– page 18

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- This tension between a desire to support growth and the impact of students on the City was highlighted in the consultation<sup>14</sup>. The Preferred Options stage (4.162) identifies the relatively high proportion of houses in the City which are used by students living outside purpose built accommodation. There is a recognition (4.164) that the opening of purpose built accommodation at Howland's Farm has relieved some of the pressure on the private rented sector and that there is the potential for students beds to be expanded further with the allocation of Mount Oswald Golf Course for mixed use development.
- It remains the case, however, that the domination of student housing in Durham has reached such a point that in the Issues and Options stage of the Plan, there was feedback from respondents that a) restrictions should be placed on the "proportion of Houses in Multiple Occupation" and b) the Local Authority should work closely with the University to provide "concentrated blocks of student accommodation"<sup>15</sup>.
- The Sustainability Appraisal which is associated with the development of the Plan<sup>16</sup>, confirms its support for this two-part approach of restricting the development of student homes in the city along with the creation of a larger volume of purpose built student accommodation "Restricting the numbers of houses/flats for student accommodation in the City would address student domination in certain areas. This together with the exploration of additional concentrated blocks of student accommodation would provide a solution for the extra student accommodation required<sup>17</sup>."

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<sup>14</sup> [http://durhamcc-consult.limehouse.co.uk/portal/planning/lp/lp\\_po?pointId=1344511102937#section-1344511102937](http://durhamcc-consult.limehouse.co.uk/portal/planning/lp/lp_po?pointId=1344511102937#section-1344511102937)

<sup>15</sup> County Durham Plan Local Plan Preferred Options (GIS version)– page 79

<sup>16</sup> Ibid page 7

<sup>17</sup> Ibid page 79

## 4.2 Durham University

- The ambitions of the University and its relationship with the city are set out in two principal documents:
  - Durham University Strategy 2010 to 2020<sup>18</sup>
  - Durham University Estate Strategy 2011 to 2020<sup>19</sup>
- The Estate Strategy was created within the context of a knowledge of the significant changes to Higher Education funding which were outlined by the coalition government. The Estate Strategy envisages further growth in student numbers at Durham University in the next decade. The Durham University Strategy includes an estimate of growth in student numbers of approximately 700 students by 2015 and 2,000 by 2020. This represents an approximately 5% growth in student numbers between 2011 and 2015 and 13% between 2011 and 2020 (basis 2010/11 student numbers of approx 15,000).
- It is envisaged that home undergraduate numbers will remain constant over the five year period although it is planned to increase numbers of staff and home students at Queen's Campus and to increase numbers of international students in specific Durham-based departments.
- The Durham University Strategy (2010-2020) outlined two principal aims which will have an impact on student numbers:
  - In the Aims and Objectives section, Aim 2 outlines the desire to increase the numbers of postgraduate Masters and PhD students and postdoctoral researchers.
  - The Education section sets a Key Target of increasing the proportion of international students to at least 20% of the total. This level has been achieved and exceeded since the 2010/11 academic year.
- Overall, therefore, there is a strong likelihood that there will be further growth in student numbers at Durham University. Part of this increase will not have an impact on Durham itself as it will be absorbed in expansion of student numbers at the Queen's Campus in Stockton; the growth of overseas students and those coming to the UK for the first time for postgraduate or doctoral level study is likely to increase the demand for purpose built accommodation owing to unfamiliarity with renting properties.

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<sup>18</sup> <http://www.dur.ac.uk/resources/about/strategy/Finalfullstrategydocument.pdf>

<sup>19</sup> <http://www.dur.ac.uk/resources/about/policies/EstatesStrategy2011-2020.pdf>



## 5. Provision of Student Accommodation

- HESA data for the 2011/12 academic year indicates that Durham University is able to offer just over a third (36.5% - 5,398 bedspaces) of their 14,790 full-time students accommodation in college/hall of residence type accommodation.
- When estimates are made of the provision of accommodation on a college-by-college basis using current data from the University and individual college's websites<sup>20</sup>, the volume of college accommodation appears to be slightly higher than the HESA figures.

**Table 6. Overview of provision of student accommodation by individual college**

College	Location	Total Students	Estimated Number of Rooms	% Students Accommodated
Collingwood	Hill	1,260	500	40%
Grey	Hill	934	400	43%
Josephine Butler	Hill	875	400	46%
St Aidan's	Hill	1,100	450	41%
St Mary's	Hill	860	343	40%
Trevelyan	Hill	800	280	35%
Van Mildert	Hill	1,500	515	34%
Ustinov	Hill	1,700	670	39%
St Hild & St Bede	Leazes Road	1,363	475	35%
St Chad's	Peninsula	527	235	45%
Hatfield	Peninsula	950	300	32%
St Cuthbert's	Peninsula	1,200	465	39%
St John's	Peninsula	530	180	34%
University	Peninsula	900	344	38%
John Snow	Queen's Campus Stockton	1,001	400	40%
Stephenson	Queen's Campus Stockton	1,100	450	41%
<b>Totals</b>		<b>16,600</b>	<b>6,407</b>	<b>39%</b>

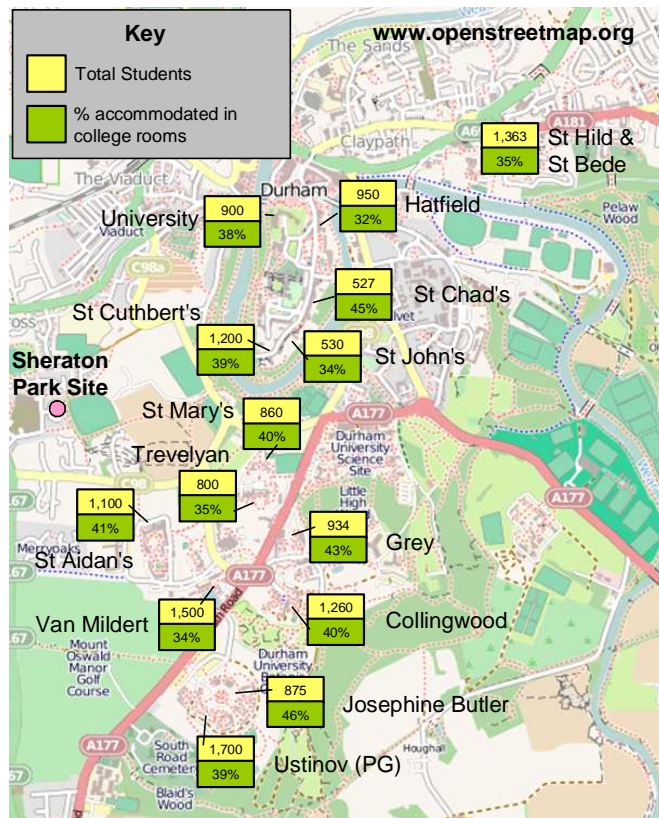
- It is reasonable to estimate that for the 13,000 full-time students studying at City of Durham based colleges, there are around 5,000 college bedspaces, an overall level of provision of some 38%.
- The provision by college varies from an estimated maximum of 46% at Josephine Butler college to a minimum of 32% for Hatfield. The average levels of provision are marginally higher for the colleges based along South Rd (40%) than for those based on the Peninsula (38%).
- The map below indicates the location of the colleges and their level of provision of college based accommodation relative to the numbers of students.

<sup>20</sup> <http://www.dur.ac.uk/undergraduate/accommodation/choosing/>

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**Map 1. Locations of colleges, total student numbers and estimated proportion of students accommodated in college rooms**



- **Accommodation Policy.** The university envisages that “Most undergraduate students live in college accommodation during their first year, with many choosing to return in subsequent years”. More specifically the aim of the University accommodation policy is:
  - To offer all full-time students the choice of whether they would like to live in college accommodation or elsewhere<sup>21</sup>.
  - That part-time or distance learning students are not eligible to live in University accommodation.
- The individual colleges are clearer in their expectation that first year students will be resident in the college itself:
  - All undergraduate freshers are expected to live in College during their first year (Josephine Butler)
  - All first year students live in College accommodation (Collingwood).
- Many also seek to accommodate undergraduates who wish to return to college accommodation in their 3<sup>rd</sup> year:
  - The college...endeavours to house to as many third years on the Bailey as request it (St John's)
  - Students may normally expect to spend their final year in College (Trevelyan).

<sup>21</sup> <http://www.dur.ac.uk/postgraduate/accommodation/catering/>

## Alumno Developments

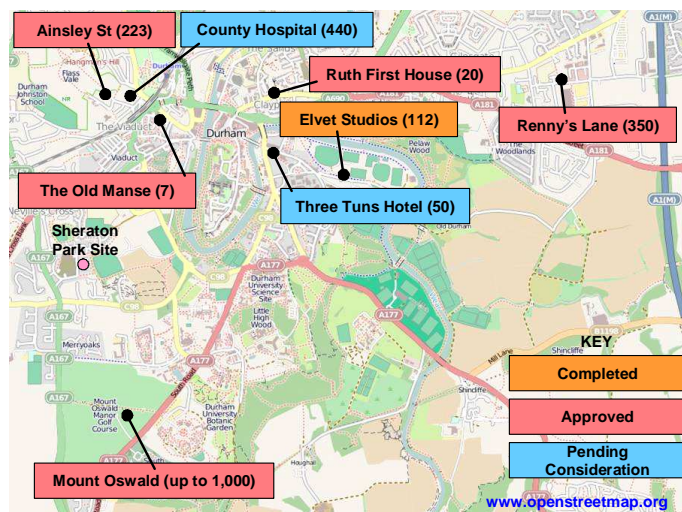
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- **Pipeline.** A number of other purpose-built student accommodation developments (as distinct from conversions of properties to HMOs) are in the planning pipeline:
  - **Completed & In Use (112 bedspaces)** - Elvet Studios
  - **Approved (1,600 bedspaces)** - Mount Oswald, Ainsley St, Renny's Lane, Ruth First House and The Old Manse
  - **Pending Consideration (490 bedspaces)** - Three Tuns Hotel and County Hospital.

**Table 7. Detail of significant student accommodation developments in Durham**

Name/Location	No Bedspaces	Applicant/ Developer	Status/Info
Elvet Studios, Green Lane, DH1 3UA	112	BAM Connislow	Opened September 2013
<b>Total - Completed</b>	<b>112</b>		
Mount Oswald Golf Course	1,000	Banks Property Ltd	Approved 5 <sup>th</sup> February 2013. Phase One would create 400 students bedspaces; later phases would create a further 600 bedspaces.
Ainsley St, Durham, DH1 4BJ	223	BAM Connislow Ltd	4/12/00851/FPA and 4/12/00852/CAC - approved December 2012.
Renny's Lane, DH1 2JD	350	BAM Connislow Ltd	CE/13/00849/FPA - approved 3rd December 2013
The Old Manse 27 North Road, DH1 4SG	7	G Parkinson	Approved 11 <sup>th</sup> October 2013
Ruth First House Claypath Durham DH1 1QS	20	Q Student	CE/13/00792/FPA – approved by the Area Planning Committee (Central and East) 14 <sup>th</sup> January 2014
<b>Total - Approved</b>	<b>1,600</b>		
Three Tuns Hotel, Old Elvet (DH1 3HL)	50 (PG Only)	University of Durham	Planning application awaiting decision – October 2013.
County Hospital North Road DH1 4ST	440	Peverill Securities	CE/13/01696/FPA – Pending consideration.
<b>Total – Pending Consideration</b>	<b>490</b>		

**Map 2. Map of student housing schemes with planning approval**



## 6. The Need for Student Accommodation in Durham

- This section investigates the need for and provision of accommodation in more detail in Durham. It uses census data from 2001 and 2011 to show how provision and need have changed. Ideally this investigation would be undertaken at a ward level. The current ward of Elvet does not have data for the 2001 census but student numbers are so significant in that ward that it is important that comparison is undertaken. As a result, use has been made of three Middle Layer Super Output Areas (MSOAs) which cover the City of Durham which are entitled County Durham 029, 030 and 033.
- **Population Change.** Population growth has been far lower in the North East region and in County Durham compared the rest of England. Whilst the population of England rose by 7.9% between 2001 and 2011, the population of the North East rose by 3.2% and that of County Durham rose by 4.0%. The population of the MSOAs which have been selected to represent Durham increased, however, by almost 20% from just under 25,000 to more than 29,000.

**Table 8. Population change 2001 to 2021**

Area	Census 2001	Census 2011	% Change 2001-2011
England	49,138,831	53,012,456	7.9%
North East	2,515,442	2,596,886	3.2%
County Durham	493,470	513,242	4.0%
<b>Durham (MSOAs 029/030/033)</b>	<b>24,489</b>	<b>29,116</b>	<b>18.9%</b>

- **Growth in Student Numbers.** Numbers of full-time students (18+) resident in the three Durham MSOAs increased sharply between 2001 and 2011. Whilst there was an overall growth in population of under 10% nationally and in the local regional districts, the numbers of full-time students (18+) living in Durham have increased by two-fifths.

**Table 9. Change in numbers of residents and full-time students (18+) - 2001 to 2011**

	Census 2001	Census 2011	% Inc
England - Residents	49,138,831	53,012,456	+8%
North East - Residents	2,515,442	2,596,886	+3%
County Durham - Residents	493,470	513,242	+4%
Durham (MSOAs 029/030/033) - Residents	24,489	29,116	+19%
Durham (MSOAs 029/030/033) – FT Students 18+	8,452	11,846	+40%

- As a result, students now make up a significantly greater proportion of the city's population in 2011 than they did in 2001.

**Table 10. Change in proportion of residents who are full-time students (18+)**

	Census 2001	Census 2011	% Point Change
England	3.1%	4.4%	+1.3%
North East	3.0%	4.5%	+1.5%
County Durham	3.2%	4.5%	+1.3%
<b>Durham (MSOAs 029/030/033)</b>	<b>34.5%</b>	<b>40.7%</b>	<b>+6.2%</b>

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- **Provision of Purpose Built Student Accommodation.** At the same time as this large increase in student numbers in the Durham MSOAs, there has been a far smaller relative increase in the numbers of full-time students living in college/university/hall of residence type accommodation (categorised in the Census as a Communal Establishment – Education) in Durham. The capacity of full-time students (aged 18+) in Durham to be housed in purpose built accommodation in the city (as defined by the MSOAs) has fallen from 61% in 2001 to 50% in 2011.

**Table 11. Summary of changes in full-time student numbers and accommodation in communal establishments - education for the three Durham MSOAs**

	Census 2001 - Persons	Census 2011 - Persons	Change 2001 to 2011 - Persons	Change 2001 to 2011 - %
Total F-T Students (18+)	8,452	11,846	+3,394	+40.2%
Persons housed in Other Establishment; Education	5,135	5,860	+725	+14.1%
<b>% Housed in Purpose Built Accommodation</b>	<b>60.8%</b>	<b>49.5%</b>		

- This growth in the numbers of students living in communal establishments in Durham is low in relation to the increase in provision of purpose built accommodation elsewhere in the UK and the increase in full-time student numbers observed above.

**Table 12. Change in numbers living in Communal Establishments - Education**

	Census 2001	Census 2011	% Inc
England	245,249	367,737	<b>+51%</b>
North East	10,207	16,513	<b>+50%</b>
County Durham	5,400	6,041	<b>+12%</b>
Durham (MSOAs 029/030/033)	<b>5,135</b>	<b>5,860</b>	<b>+14%</b>

- Given, therefore, that the increase in numbers of full-time students in the Durham MSOAs (+3,394) has been far greater than the increase in the numbers living in communal establishments (+725), this leads us to try to understand where those full-time students are now living. The evidence from the Census is that greater numbers of students are living in All Student Houses and in private rented accommodation.
- **All Student Households.** At the same time as there has been relatively small growth in the numbers of places for full-time students in purpose built accommodation, there has been a greater than average increase in the proportion of households which consist exclusively of full-time students aged 18+ in Durham.

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**Table 13. Change in persons living in All Student Households**

	Numbers Living in Student Only Households - <b>Census 2001</b>	% of All Residents Living in a Student Only Household – <b>Census 2001</b>	Numbers Living in Student Only Households - <b>Census 2011</b>	% of All Residents Living in a Student Only Household – <b>Census 2011</b>	% Point Change in Proportion Living in a Student Only HH
England	295,773	0.6%	465,663	0.9%	<b>+0.3%</b>
North East	17,161	0.7%	30,754	1.2%	<b>+0.5%</b>
County Durham	2,896	0.6%	6,183	1.2%	<b>+0.6%</b>
Durham (MSOAs 029/030/033)	2,722	11.1%	5,047	17.3%	<b>+6.2%</b>

- In Durham too there has been a far greater than average increase in the numbers living in private rented accommodation (defined in the Census as “Private rented: Private landlord or letting agency”)

**Table 14. Summary of the changes in structure of residents living in private rented accommodation between the 2001 and 2011 census**

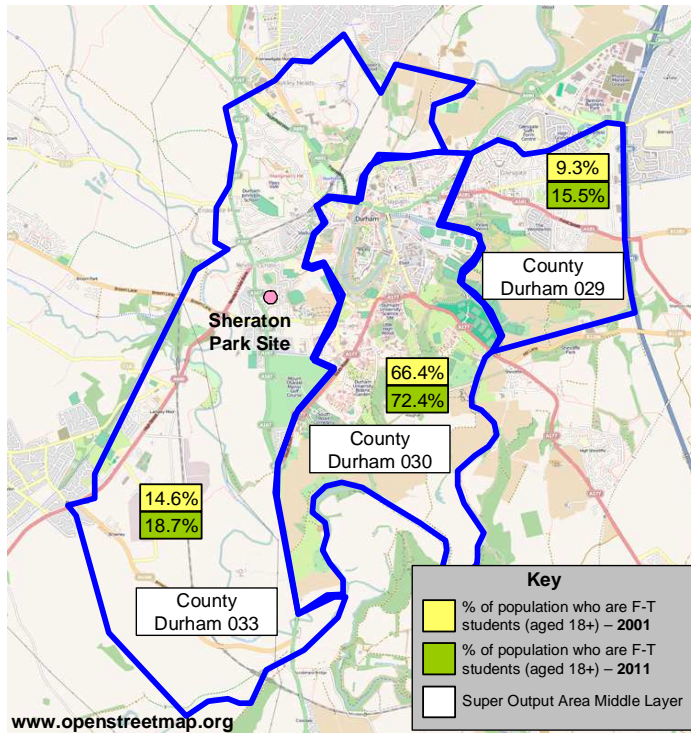
	Persons living in Private Rented Households <b>Census 2001</b>	Persons living in Private Rented Households as a % of all Households 2001	Persons living in Private Rented Households <b>Census 2011</b>	Persons living in Private Rented Households as a % of all Households 2011
England	3,862,891	8.8%	8,071,527	15.2%
North East	147,106	6.3%	318,764	12.3%
County Durham	23,765	5.0%	59,670	11.6%
Durham (MSOAs 029/030/033)	3,882	16.1%	7,852	27.0%

- **Distribution of Students Across Durham.** These increases in the numbers of students have not been distributed evenly across the city. Ideally this analysis would be undertaken by ward but we can see from the map below that almost three-quarters of all residents of MSOA County Durham 030 are now full-time students. In 2001, 6,675 of the 10,056 residents of this MSOA were students (66%); in 2011 this level has risen to 8,909 out of a resident population of 12,248 (72.7%). In MSOA County Durham 033 (in which the Sheraton Park site is situated), the level had increased from 14.6% (1,208 students) to 18.7% (1,903). In MSOA County Durham 029 the level had increased from 9.3% (569 students) to 15.5% (1,034).

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**Map 3. MSOA map City of Durham; Change in the numbers of full-time students (18+) as a proportion of the MSOA population – 2001 to 2011**



- The picture of student accommodation and how that has changed in the three MSOAs is summarised in the table below.

**Table 15. Summary of the changes in structure of population and accommodation for full-time students (18+) living in the 3 MSOAs between the 2001 and 2011 census**

	County Durham 033	County Durham 030	County Durham 029	Total
Usual Residents 2001	8,291	10,056	6,142	24,489
Usual Residents 2011	10,184	12,248	6,684	29,116
F-T Students 18+ 2001	1,208	6,675	569	8,452
F-T Students 18+ 2011	1,903	8,909	1,034	11,846
Living in Halls of Residence 2001	234	4,901	-	5,135
Living in Halls of Residence 2011	310	5,539	11	5,860
Students Living in Private Rented Accom 2001*	916	1,668	535	3,118
Students Living in Private Rented Accom 2011*	1,497	3,168	962	5,627

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- The greatest pressure is clearly on MSOA County Durham 030 which covers both the Peninsula and the colleges which border South Rd. In this MSOA:
  - all of the increase in population between 2001 and 2011 can be accounted for by an increase in student residents (resident increase 2,192; F-T student 18+ 2,234).
  - While the numbers of students have risen by 2,234, the numbers of residents living in Halls of Residence type accommodation has increased by 638.
  - Pressure on private rented accommodation has increased significantly with the numbers of students living in private rented accommodation almost doubling from 1,668 to 3,168.

## **7. Notice**

- Please note that we would advise that this report is for general informative purposes only. It does not constitute a formal valuation, appraisal or recommendation.
- This report is confidential to the persons to whom it is addressed and no responsibility can be accepted to any 3<sup>rd</sup> party for the whole or any part of its contents.
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- Whilst we have made every effort to ensure that the data contained in this report is correct, no responsibility can be taken for omissions or erroneous data provided by a 3<sup>rd</sup> party or information being unavailable and inaccessible during the research period.
- As our findings are based on the assumptions given above they should be regarded as valid for a limited period of time and subject to periodic review.