

**Cambridge** Centre  
for Housing &  
Planning Research

# **Assessment of Student Housing Demand and Supply for Oxford City Council**

## **Report to Oxford City Council**

January 2017

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UNIVERSITY OF  
CAMBRIDGE

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## **Executive summary**

Cambridge City Council and Oxford City Council have commissioned this study to help to inform planning policy with regard to the provision of student accommodation within the two cities.

This report relates to Oxford City. It includes a baseline analysis of the current structure of the student population, its current accommodation, and the future plans of the different educational institutions. It analyses what the existing and future projected 'shortfall' is in terms of purpose built student accommodation (PBSA) for different institutions.

### **The sources of data**

The data used in the analysis comes from two main sources. The first source of data is data extracted from the Higher Education Statistics Agency (HESA) returns made by the University of Oxford and Oxford Brookes University.

For the purposes of this research, part-time students are excluded from the analysis of the HESA data based on the assumption that they already have their own home, and do not require student accommodation.

The second source of data is an online survey that was used to collect data from individual institutions about their student profile, current accommodation provision, and future planned provision. The University of Oxford Colleges and Oxford Brookes University were included. The non-university institutions surveyed excluded the standard school sector but included FE colleges, language schools, performing arts colleges and summer schools.

All the data on the other institutions is based on the responses received, rather than an adjustment for non-respondents.

Data were collected from the University of Oxford colleges via an online survey developed by the research team. In the event, the University adapted the survey and administered it using their own software through internal channels. The survey was completed by 33 colleges (including Permanent Private Halls<sup>1</sup>); this gives a response rate of 75 per cent. Anonymised data, preventing the identification of individual Colleges, were provided to the research team by the University of Oxford. Not all questions were answered.

There are a number of issues to note in relation to the data analysis. A key issue is the differences between data sources on student numbers and the difficulty in matching data between sources. A second is the uncertainty around certain information, such as future growth plans.

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<sup>1</sup> Permanent Private Halls were founded by Christian denominations and are partly governed by the denomination.

## **Definitions of student numbers**

One issue that needs highlighting is that student numbers can appear to vary, quite legitimately, depending on what source or definition is used. Counting students, even for institutions, is quite difficult.

The student numbers in this report are based upon the returns made by the two universities to the Higher Education Statistics Agency (HESA). Each of the universities completed a standard template, extracting data from their 2015/16 HESA return, and these data have been used in producing the tables in this report.

The HESA data is a 'flow', recording all students over the course of the academic year (August to August), but the universities may also publish 'snapshot' data at a fixed point during the year, and the two datasets will not match.

HESA data records 'student instances', so that a student completing a MPhil and starting a PhD in the same year will count as two 'student instances'. The data in this report have been edited to provide a headcount, and therefore the overall numbers will be different from HESA tables.

Student numbers are affected at any point in time by the number of incoming visiting and exchange students, and the number of outgoing visiting and exchange students.

Some students are classified as 'dormant'. These are generally students who are intermitting, very often for health related reasons.

Students 'not in attendance at institution' will include, for example, modern languages students abroad as part of their course, or postgraduates away on fieldwork.

Part-time students who are expected to spend less than eight consecutive course weeks in the UK during their entire programme and who are not UK-domiciled are included in the Aggregate Offshore record and excluded from the HESA Student record, and therefore not included in any of the tables. These students are usually present during vacations, and do not add to the need for student accommodation.

A number of postgraduate students are recorded as 'writing up' (usually completing their thesis), However, this is a status that can potentially last for some years, and the whereabouts of these students is not necessarily recorded. Many may no longer be in the city.

## **Definitions of student accommodation**

Student accommodation is classified in the HESA returns under a number of headings:

- College/University maintained property
- Parental/guardian home
- Other (not listed)
- Not known

- Own permanent residence either owned or rented by you
- Other rented accommodation (shared with others on a temporary basis)
- Private sector halls (not College/University maintained)

Data on student accommodation is self-reported by students to their university, and there may be important inaccuracies in the data reported.

For example, students may report that they live in 'Own permanent residence owned or rented by you', when they are in fact living in a house or flat shared with other students, and should have reported their accommodation as 'Other rented accommodation (shared with others on a temporary basis)'.

### **Key assumptions and projections**

The data analysis made assumptions about the average number of students in a shared property. The Housing and Employment Land Availability Assessment (HELAA) has taken the average number of students per house as 5<sup>2</sup> (Section 1.3.7). Therefore, this report also assumes that the average number of students in a shared property is 5.

The analysis of the future projected estimated 'shortfall' in PBSA has a projection for 10 years. There is a considerable lack of certainty about potential future growth which means that 10 years is the maximum projection that can be made using realistic data.

In the Strategic Plan 2013-18, the University of Oxford envisages growth but does not express any numeric target. This report has therefore modelled growth at the University of Oxford on a similar scale to that envisaged at the University of Cambridge: half of one percent for undergraduates and two percent for postgraduates. Data for 2010-2015 are on the University of Oxford website: undergraduate numbers fell from 11,723 to 11,603 (98.98%) while postgraduate numbers rose from 9,327 to 10,499 (112.56%), a compound growth rate of 2.4% per annum. This suggests that the assumptions used to model growth are reasonable.

The estimated 'shortfall' is the amount of PBSA that could accommodate all of the students who are not currently housed by their educational institution, and are living in existing family housing shared with other students.

The estimates are heavily dependent upon the assumptions concerning: the numbers of students actually occupying 'Own permanent residence owned or rented by you'; the average numbers of students actually occupying shared houses; the actual growth rate of the universities, and the quality of the self-reported HESA data.

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<sup>2</sup>[https://www.oxford.gov.uk/downloads/file/2985/housing\\_and\\_economic\\_land\\_availability\\_assessment\\_october\\_2016\\_report](https://www.oxford.gov.uk/downloads/file/2985/housing_and_economic_land_availability_assessment_october_2016_report)

### **Full-time and part-time students**

This report assumes that part-time students do not therefore create any demand for accommodation in excess of that provided for full-time students. Part-time students at the two universities are therefore not included in any of the analysis of the 'shortfall' in PBSA later in this report. Part-time students at the other educational institutions are included in Table 1, and discussed in detail in the report, because their accommodation is more diverse than that of the university student population.

## **Current student housing profile**

The table below (Table 1) summarises the data for each of the two universities (based on HESA returns), the total position for the two universities together, the data for the non-university educational institutions (based on the survey conducted for this research), and overall totals for the student population in Oxford.

All the data on the other institutions is based on the responses received, rather than making any adjustment for non-respondents.

The table classifies the seven types of accommodation used for HESA returns, plus a category for 'homestay' students, into four broad groups:

- Purpose built student accommodation (PBSA), which includes University/College maintained accommodation and private halls.
- Shared existing housing, which includes both 'Own permanent residence either owned or rented by you' and 'Other rented accommodation (shared with others on a temporary basis)'.
- Existing family housing, which includes the parental home and 'homestay'.
- No information, which includes the 'other' and 'not known' categories in the HESA data.

Baseline: 2015/16 student accommodation: numbers of students accommodated in Oxford										
		Purpose Built Student Accommodation		Shared existing housing		Existing family housing		No information		Total
		University / College maintained *	Private halls	Other rented	Own home **	Parental / guardian home ***	Homestay	Other	Not known	
<b>University of Oxford</b>	Undergraduate	9230	0	1585	129	25		62	31	<b>11062</b>
	Postgraduate (1 year)	2140	0	833	189	49		68	4	<b>3283</b>
	Postgraduate (2+ years)	3001	0	1915	612	72		168	28	<b>5796</b>
	<b>Subtotal</b>	<b>14371</b>	<b>0</b>	<b>4333</b>	<b>930</b>	<b>146</b>		<b>298</b>	<b>63</b>	<b>20141</b>
<b>Oxford Brookes University</b>	Undergraduate	3579	1001	3532	229	178		0	443	<b>8962</b>
	Postgraduate (1 year)	414	19	329	58	14		0	24	<b>858</b>
	Postgraduate (2+ years)	99	19	194	40	6		0	20	<b>378</b>
	<b>Subtotal</b>	<b>4092</b>	<b>1039</b>	<b>4055</b>	<b>327</b>	<b>198</b>	<b>0</b>	<b>0</b>	<b>487</b>	<b>10198</b>
<b>Total Universities</b>	Undergraduate	12809	1001	5117	358	203		62	474	20024
	Postgraduate (1 year)	2554	19	1162	247	63		68	28	4141
	Postgraduate (2+ years)	3100	19	2109	652	78		168	48	6174
	<b>Total Universities</b>	<b>18463</b>	<b>1039</b>	<b>8388</b>	<b>1257</b>	<b>344</b>	<b>0</b>	<b>298</b>	<b>550</b>	<b>30339</b>
<b>Non-university institutions</b>		2150	2034	139	12318	656		0	607	17904
	<b>Total all institutions</b>	<b>20613</b>	<b>3073</b>	<b>8527</b>	<b>13919</b>	<b>656</b>	<b>298</b>	<b>1157</b>	<b>48243</b>	

\* includes 384 bedspaces managed but not owned by OBU

\*\* excludes 1,144 OBU students with own home outside Oxford

\*\*\* excludes 778 OBU students living in parental home outside Oxford

Table 1: The baseline position of number of students 2015/16

### Key points:

1. Over a third (37%) of all students in Oxford are at the various non-university institutions.
2. The numbers for Oxford Brookes University exclude students who are known to live outside Oxford: data on student term time addresses are not available for the University of Oxford, whose students are all assumed to live in Oxford.
3. Nearly three quarters (71%) of the University of Oxford's students live in PBSA, and 4,333 live in shared houses.
4. Half (50.3%) of Oxford Brookes University's students live in PBSA, and 4,055 live in shared houses.
5. Two thirds (66.2%) of the private PBSA in the city is used by the non-university institutions
6. Just over two thirds (69%) of the students at the non-university institutions are living in their parental home (the majority of these are City of Oxford College students).



## Utilisation of shared housing compared

The table below (Table 2) compares the extent to which each of the two universities utilises shared existing housing in the city.

Two universities: % of students living in shared houses in Oxford compared				
		Living in shared houses	Total student population	Students in shared houses as % of total
Oxford Brookes University	Undergraduate	3532	8962	39.41%
	Postgraduate (1 year)	329	858	38.34%
	Postgraduate (2+ years)	194	378	51.32%
	All postgraduate	523	1236	42.31%
	Total	4055	10198	39.76%
University of Oxford	Undergraduate	1585	11062	14.33%
	Postgraduate (1 year)	833	3283	25.37%
	Postgraduate (2+ years)	1915	5796	33.04%
	All postgraduate	2748	9079	30.27%
	Total	4333	20141	21.51%

Table 2: Proportion of students living in shared housing in both universities, analysis based on HESA data

**The overall numbers of students accommodated in shared houses is fairly similar between the two universities, at 4,055 for Oxford Brookes University and 4,333 for the University of Oxford, but the types of students accommodated are significantly different.**

The table shows that Oxford Brookes University houses more than twice as many undergraduates in shared housing in the city than the University of Oxford, reflecting the long history of the Colleges in providing accommodation for undergraduates.

However, in the case of postgraduate students, the proportions living in shared houses in the city are almost identical at 30% of all postgraduates, although the number of postgraduates of the University of Oxford living in shared housing is more than five times the number at Oxford Brookes University.

## Existing and future projected 'shortfall' of PBSA

The 'shortfall' is the amount of purpose built student accommodation (PBSA) that could accommodate all of the students who are not currently housed by their educational institution, and are living in existing family housing shared with other students.

The table below (Table 3) summarises the overall position for university student accommodation in the city.

The table presents an estimate of the 'shortfall' in PBSA which, if built, would absorb all students currently living in shared houses in the city (including in this category both 'other rented' and 'own home'). The estimate is calculated by deducting from the total number of students:

- All those already living in PBSA.
- All those currently living in the parental home.
- All those for whom there is no information (848 students, or 3% of the total 30,159).

This suggests that **providing 9,465 bed spaces in PBSA would allow the return of all shared houses currently occupied by students to the open market.**

The number of houses that might be released is dependent upon the average number of students living in each shared house. **If there are 5 students on average in each shared house, then 1,893 houses could be returned to the open market.**

Two universities: summary of existing accommodation at 2015/16 and 'shortfall' of PBSA										
	Total	Purpose Built Student Accommodation		Shared existing housing		Existing family housing		No information		PBSA shortfall
		University / College maintained *	Private halls	Other rented	Own home	Parental / guardian home	Homestay	Other	Not known	
Undergraduate	20024	12809	1001	5117	358	203	0	62	474	5475
Postgraduate (1 year)	4141	2554	19	1162	247	63	0	68	28	1409
Postgraduate (2+ years)	5994	3100	19	1929	652	78	0	168	48	2581
<b>Total</b>	<b>30159</b>	<b>18463</b>	<b>1039</b>	<b>8208</b>	<b>1257</b>	<b>344</b>	<b>0</b>	<b>298</b>	<b>550</b>	<b>9465</b>

Table 3: Maximum potential 'shortfall' in PBSA

The estimate in the table above is clearly a 'maximum' position, which assumes that all students, irrespective of their age, type of course, or personal preferences, would choose to live in PBSA if it were available. **It also assumes that the students who self-reported that they live in 'other rented' accommodation and their 'own home' currently share housing.**

## Implications of potential future growth in student numbers

The research then analysed the impact of the growth plans of the universities.

Oxford Brookes University future strategy assumes growth of between one and two percent over the next ten years, and the table below shows the student numbers in 2026 resulting from a one percent per annum growth rate.

As outlined in Section 2.3 above, in its Strategic Plan 2013-18, the University of Oxford envisages growth but does not express any numeric target. This report has therefore modelled growth at the University of Oxford on a similar scale to that envisaged at the University of Cambridge: half of one percent for undergraduates and two percent for postgraduates. Data for 2010-2015 are on the University of Oxford website: undergraduate numbers fell from 11,723 to 11,603 (98.98%) while postgraduate numbers rose from 9,327 to 10,499 (112.56%), a compound growth rate of 2.4% per annum. This suggests that the assumptions used to model growth are reasonable.

The table below summarises the current and potential 'shortfall' in student accommodation for the university sector.

<b>Overall shortfall in university student accommodation</b>		
	<b>Current shortfall in PBSA @ 2015/16</b>	<b>Additional shortfall in PBSA @ 2026</b>
Oxford Brookes University	4382*	1540**
University of Oxford	5263	2462
Total	9465	4002
*5526 including those living outside Oxford		
** midpoint of OBU growth scenarios		

Table 4: Overall 'shortfall' in university student accommodation

The table suggests that a total of **13,467 student rooms would have to be built in PBSA if the current and potential future 'shortfalls' in student accommodation are to be met.**

This would accommodate all of the students who are not currently housed by their educational institution, and living in existing family housing shared with other students, therefore allowing the return of all shared houses currently occupied by students to the open market.

**Meeting the current 'shortfall' through PBSA might release 1,893 houses, currently occupied by students sharing, into the open market.**

If PBSA is not available to meet future growth, then by 2026, 754 additional existing houses would have to be converted into shared student accommodation in order to meet demand, as shown in the table below, leading to a total number of shared houses of approximately 2432.

Current occupancy of shared houses, and projected growth to 2026, if no PBSA built						
		Current (2015/16)		Growth to 2026		
		Student numbers in shared houses	Numbers of shared houses (@ 5 students per house)	Student numbers in shared houses*	Numbers of shared houses (@ 5 students per house)	Total shared houses by 2026
<b>Oxford Brookes University</b>	Undergraduate	3532	706	1313	263	<b>969</b>
	Postgraduate (1 year)	329	66	80	25	<b>91</b>
	Postgraduate (2+ years)	194	39	51	10	<b>49</b>
	<b>Subtotal</b>	<b>4055</b>	<b>811</b>	<b>1444</b>	<b>298</b>	<b>1109</b>
<b>University of Oxford</b>	Undergraduate	1585	317	553	111	<b>428</b>
	Postgraduate (1 year)	833	167	651	130	<b>297</b>
	Postgraduate (2+ years)	1915	383	1076	215	<b>598</b>
	<b>Subtotal</b>	<b>4333</b>	<b>867</b>	<b>2280</b>	<b>456</b>	<b>1323</b>
<b>Total</b>	<b>8388</b>	<b>1678</b>	<b>3724</b>	<b>754</b>	<b>2432</b>	

\* Midpoint of growth scenarios for Oxford Brookes University

Table 5: Use of shared houses in 2015/16 and 2026

These estimates are heavily dependent upon the assumptions concerning: the numbers of students actually occupying 'Own permanent residence owned or rented by you'; the average numbers of students actually occupying shared houses; the actual growth rate of the universities, and the quality of the self-reported HESA data.

# **1 Introduction**

Cambridge City Council and Oxford City Council have commissioned this study to help to inform planning policy with regard to the provision of student accommodation within the two cities.

This report relates to Oxford City. It includes a baseline analysis of the current structure of the student population, its current accommodation, and the future plans of the different educational institutions.

## **2 Methodology**

### **2.1 Inception meeting**

The project began with an inception meeting to discuss the research, methodology and outputs.

### **2.2 Identification of institutions and key contacts**

A comprehensive list of the relevant institutions that need to be included in the study was developed in Excel. Phone calls were made to the institutions to identify the best person to contact to complete the survey and to gather their contact details. The contact list has been updated throughout the research and has been supplied to the Council.

### **2.3 Secondary data analysis**

Analysis of secondary data was conducted to collect as much data as already available on student housing and student numbers. The key source of data is the Higher Education Statistics Agency, which collects data on a very wide range of relevant topics, including student numbers, types of courses and student accommodation in purpose built or institution owned accommodation. This only supplies data for the universities, in this case, the University of Oxford and Oxford Brookes University. Both institutions supplied data based on their HESA returns.

### **2.4 Online survey**

An online survey was developed to collect data from individual institutions in relation to the brief, including data about their student profile, current accommodation provision, and future planned provision. Respondents were asked to provide a contact telephone number for a follow up interview as necessary. People were given the option to talk through the survey questions if they preferred not to complete it online.

Qualtrics software was used to design and distribute the web-based survey. This allowed a wide range of question types and any filtering options needed (e.g. to direct respondents to certain questions based on answers to previous questions). It also enabled monitoring of responses directly in real time and the ability to chase non-responders whenever required.

The survey content was agreed with the nominated Council officers, piloted and discussed with representatives from the educational institutions.

A survey was distributed to all of the non-university educational institutions in Oxford. For the two universities, some of the relevant data were collected separately as it drew on their HESA returns, as explained above. A shorter survey was distributed to Oxford Brookes University.

Data were collected from the University of Oxford colleges via an online survey developed by the research team. In the event, the University adapted the survey and administered it using their own software through internal channels. The survey was completed by 33

colleges (including Permanent Private Halls<sup>3</sup>); this gives a response rate of 75 per cent. Anonymised data, preventing the identification of individual Colleges, were provided to the research team by the University of Oxford. Not all questions were answered. See the Appendix for a covering note about the data, written by the University of Oxford.

## **2.5 Interim project review**

An interim project report was submitted, followed by discussion with the Council's nominated project officers.

## **2.6 Data Analysis**

The data were analysed to address the aims and objectives and the findings are detailed in this report. Data have been provided in a format which can allow the Council to update the information in future years. A clear record was kept of the institutions identified, the key contacts and questions asked, so that the Councils can update the work if necessary.

There are a number of issues to note in relation to the data analysis. A key issue is the differences between data sources on student numbers and the difficulty in matching data between sources. A second is the uncertainty around certain information, such as future growth plans.

## **2.7 Definitions of student numbers**

One issue that needs highlighting is that student numbers can appear to vary, quite legitimately, depending on what source or definition is used. Counting students, even for institutions, is quite difficult.

The student numbers in this report are based upon the returns made by the two universities to the Higher Education Statistics Agency (HESA). Each of the universities completed a standard template, extracting data from their 2015/16 HESA return, and these data have been used in producing the tables in this report.

The HESA data is a 'flow', recording all students over the course of the academic year (August to August), but the universities may also publish 'snapshot' data at a fixed point during the year, and the two datasets will not match.

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Student numbers are affected at any point in time by the number of incoming visiting and exchange students, and the number of outgoing visiting and exchange students.

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A number of postgraduate students are recorded as 'writing up' (usually completing their thesis), However, this is a status that can potentially last for some years, and the whereabouts of these students is not necessarily recorded. Many may no longer be in the city.

All the data on the other institutions is based on the responses received, rather than an adjustment for non-respondents.

## **2.8 Definitions of student accommodation**

Student accommodation is classified in the HESA returns under a number of headings:

- College/University maintained property
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Data on student accommodation is self-reported by students to their university, and there may be important inaccuracies in the data reported.

For example, students may report that they live in 'Own permanent residence owned or rented by you', when they are in fact living in a house or flat shared with other students, and should have reported their accommodation as 'Other rented accommodation (shared with others on a temporary basis)'.

## **2.9 Key assumptions and projections**

The data analysis made assumptions about the average number of students in a shared property. The Housing and Employment Land Availability Assessment (HELAA) has taken the average number of students per house as 5<sup>4</sup> (Section 1.3.7). Therefore, this report also assumes that the average number of students in a shared property is 5.

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<sup>4</sup>[https://www.oxford.gov.uk/downloads/file/2985/housing\\_and\\_economic\\_land\\_availability\\_assessment\\_october\\_2016\\_report](https://www.oxford.gov.uk/downloads/file/2985/housing_and_economic_land_availability_assessment_october_2016_report)



The analysis of the future projected estimated 'shortfall' in PBSA has a projection for 10 years. There is a considerable lack of certainty about potential future growth which means that 10 years is the maximum projection that can be made using realistic data.

The estimated 'shortfall' is the amount of PBSA that could accommodate all of the students who are not currently housed by their educational institution, and are living in existing family housing shared with other students.

The estimates in the report are heavily dependent upon the assumptions concerning: the numbers of students actually occupying 'Own permanent residence owned or rented by you'; the average numbers of students actually occupying shared houses; the actual growth rate of the universities, and the quality of the self-reported HESA data.

### **2.10 Full-time and part-time students**

For the purposes of this research, part-time students are excluded from the analysis of the HESA data based on the assumption that they already have their own home, and do not require student accommodation. Part-time students at the two universities are therefore not included in any of the analysis of the 'shortfall' in PBSA later in this report. Part-time students at the other educational institutions are included in Table 1, and discussed in detail in the report, because their accommodation is more diverse than that of the university student population.

## 3 Baseline analysis

### 3.1 Current student numbers

#### 3.1.1 Baseline 2015/16: student numbers and accommodation

The table below (Table 1) summarises the data for each of the two universities (based on HESA returns), the total position for the two universities together, the data for the non-university educational institutions (based on the survey conducted for this research), and overall totals for the student population in Oxford.

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The table classifies the seven types of accommodation used for HESA returns, plus a category for 'homestay' students, into four broad groups:

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- Existing family housing, which includes the parental home and 'homestay'.
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Baseline: 2015/16 student accommodation: numbers of students accommodated in Oxford										
		Purpose Built Student Accommodation		Shared existing housing		Existing family housing		No information		Total
		University / College maintained *	Private halls	Other rented	Own home **	Parental / guardian home ***	Homestay	Other	Not known	
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	<b>Subtotal</b>	<b>14371</b>	<b>0</b>	<b>4333</b>	<b>930</b>	<b>146</b>		<b>298</b>	<b>63</b>	<b>20141</b>
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	Postgraduate (1 year)	2554	19	1162	247	63		68	28	4141
	Postgraduate (2+ years)	3100	19	2109	652	78		168	48	6174
	<b>Total Universities</b>	<b>18463</b>	<b>1039</b>	<b>8388</b>	<b>1257</b>	<b>344</b>	<b>0</b>	<b>298</b>	<b>550</b>	<b>30339</b>
<b>Non-university institutions</b>		2150	2034	139		12318		656	0	607
	<b>Total all institutions</b>	<b>20613</b>	<b>3073</b>	<b>8527</b>		<b>13919</b>		<b>656</b>	<b>298</b>	<b>1157</b>
										<b>48243</b>

\* includes 384 bedspaces managed but not owned by OBU

\*\* excludes 1,144 OBU students with own home outside Oxford

\*\*\* excludes 778 OBU students living in parental home outside Oxford

Table 1: The baseline position of number of students 2015/16

### Key points:

1. Over a third (37%) of all students in Oxford are at the various non-university institutions.
2. The numbers for Oxford Brookes University exclude students who are known to live outside Oxford: data on student term time addresses are not available for the University of Oxford, whose students are all assumed to live in Oxford.
3. Nearly three quarters (71%) of the University of Oxford's students live in PBSA, and 4,333 live in shared houses.
4. Half (50.3%) of Oxford Brookes University's students live in PBSA, and 4,055 live in shared houses.
5. Two thirds (66.2%) of the private PBSA in the city is used by the non-university institutions.
6. Just over two thirds (69%) of the students at the non-university institutions are living in their parental home (the majority of these are City of Oxford College students).

## 3.2 University of Oxford

### 3.2.1 Overview

Data were collected from the University of Oxford colleges via an online survey developed by the research team. In the event, the University adapted the survey and administered it using their own software through internal channels. The survey was completed by 33 colleges (including Permanent Private Halls<sup>5</sup>); this gives a response rate of 75 per cent. Anonymised data, preventing the identification of individual Colleges, were provided to the research team by the University of Oxford. Not all questions were answered. Please see the Appendix for a note on the survey data, written by the University of Oxford.

Whilst 35 of the colleges and Permanent Private Halls of the University of Oxford accept students on both undergraduate and postgraduate courses, eight colleges (Campion Hall, Green Templeton, Kellogg, Linacre, Nuffield, St. Antony's, St. Cross and Wolfson) only accept postgraduate students. One college (All Souls) does not admit undergraduate or postgraduate students.

### 3.2.2 Student numbers

The HESA data for the University of Oxford shows that there were 20,141 students in 2015/16, and 2,267 part-time students. The part-time number is actually at 1 December 2015, the full-time number is the HESA flow for the year.

Not all students of the University of Oxford will require accommodation in the city for their courses. Across the colleges, according to the response to the online survey, 390 students were already resident of the city before commencing their courses. Further, 421 students were reported to live outside Oxford and commute into the city for their classes. Overall, this would suggest that 811 students at the University of Oxford do not require accommodation for their courses.

### 3.2.3 Accommodating students

All but one college has PBSA that they own. Across the colleges, 10,365 students are accommodated in PBSA that is owned by the colleges and Permanent Private Halls.

Five colleges short-term lease student accommodation, which houses 111 students.

Seven colleges lease ordinary housing stock from private owners to use as student accommodation. Between them, the colleges lease 17 properties, which houses 87 students (an average of five students per house). The use of ordinary housing stock for student accommodation via colleges is summarised in Table 2.

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<sup>5</sup> Permanent Private Halls were founded by Christian denominations and are partly governed by the denomination.

College	Number of properties leased	Number of students accommodated
A	2	10
AA	1	9
D	1	5
L	1	9
M	8	48
P	0	6
Q	2	0
Y	2	0

Table 2: The number of properties from ordinary housing stock leased by each college, and how many students are accommodated

Two of the colleges have formal nomination agreements with landlords; these arrangements provide accommodation for 11 students.

One college has informal arrangements with landlords or private families who regularly provide accommodation for its students; these arrangements accommodate seven students.

Across all the different forms of college provided accommodation, postgraduate and undergraduate students are accommodated in the following ways (Table 3).

	Self-contained studio flats	En suite bedrooms	Bedrooms with shared facilities	Total
<b>Postgraduate taught or research courses</b>	68 (2%)	1,120 (39%)	1,681 (59%)	2,869 (100%)
<b>Undergraduate degree courses</b>	3,119 <sup>6</sup> (39%)		4,945 (61%)	8,064 (100%)
<b>Total</b>	4,307 (39%)		6,626 (61%)	10,933 (100%)

Table 3: The number, and type, of accommodation units provided by the colleges

Table 3 demonstrates that postgraduate and undergraduate students are likely to be accommodated similarly, with only a two per cent difference in the use of bedrooms with shared facilities between these groups. The colleges are, however, aware that some of their students have partners or families and may therefore have different housing requirements.

Twenty-eight colleges were aware that some of their students were either married or in long-term relationships; eight colleges could estimate the numbers of such students, suggesting that this totalled at least 358 students. In addition, 22 colleges were aware that some of their students had children; six colleges estimated the numbers of students with children to be 99.

<sup>6</sup> Undergraduate rooms are only recorded within the University of Oxford system as being either en suite or non-en suite, without additional detail.

### 3.2.4 Future plans

All colleges were asked about their planned rate of expansion, by course type, over the next five to ten years (Table 4). The data were supplied via an intermediary to (up to) 15 decimal places; we would suggest that these data are unlikely to be robust and urge caution in drawing conclusions based on these data.

College	Intended rate of expansion	
	Postgraduate taught or research	Undergraduate degree
A	1.53%	0.26%
AA	0	0
AB	0.18%	0
AC	95.74%	0
AD	0	0
AE	-4.81%	1.40%
AF	0	0
AG	-	-
B	1.56%	-1.73%
C	0	0.43%
D	0	-0.75%
E	0	0
F	0	0
G	0	0.27%
H	0	0
I	0	0
J	0	-0.91%
K	2.70%	0
L	2.53%	-0.63%
M	-2.63%	0
N	-	-
O	0	0
P	0	1.84%
Q	0	0
R	0	0
S	10.06%	0
T	0	0
U	0	0
V	0	0
W	0	0.29%
X	0	-1.68%
Y	23.10%	2.72%
Z	0	0

Table 4: Planned rate of expansion, by course type

Whilst most colleges are expecting undergraduate numbers to remain static, those who are planning for change expect this to be in the region of negative one to plus one per cent; only four colleges expect growth or decline in undergraduate numbers outside of this range.

Predicted change in postgraduate numbers is more variable across the colleges. Again, most intend on keeping a stable postgraduate population, but some are planning greater

change (with one college expecting to double its postgraduate population). As baseline student population numbers were not provided for the colleges, the impact of the planned rate of expansion or decline cannot be calculated.

All colleges were asked whether their plans over the next five to ten years' time have been influenced by the outcome of the referendum on EU membership. No colleges saw Brexit as an opportunity for expansion, but are instead continuing with their plans.

The colleges were asked about their thoughts on any changing demand in types of student accommodation (self-contained studio flats, en suite bedrooms and bedrooms with shared facilities). Sixteen colleges predicted an increasing demand for self-contained studio flats over the next five to ten years, 13 colleges thought demand would remain the same and two predicted a decrease in demand.

Twenty-seven colleges thought that demand for en suite bedrooms would increase and six thought it would remain the same over the next five to ten years.

No college thought the demand for bedrooms with shared facilities would increase over the next five to ten years. Fourteen colleges thought the demand for bedrooms with shared facilities would remain the same and 19 predicted a decrease in demand.

No college provided any information about how they planned to provide housing for their students in five to ten years' time.

### **3.2.5 Additional comments**

The colleges were welcomed to provide any additional comments about student housing. The comments received suggest that some colleges have recently built new student accommodation, whilst others are planning to do so.

One college aims to consolidate their housing more centrally to the college, whilst another is considering developing student accommodation away from the main site to release units for use as offices.

Some of the colleges suggested that accommodation was rented by the institution as a short-term measure to house students whilst existing accommodation was undergoing renovation or whilst new accommodation was still being built.

## **3.3 Oxford Brookes University**

### **3.3.1 Overview**

Information was collected from Oxford Brookes University using three different approaches; Oxford Brookes University completed a spreadsheet similar to that provided to HESA, an online survey and informal conversations with the research team.

Oxford Brookes University has three campuses in Oxford and one campus in Swindon. The information supplied and reported here is in relation to its activities at the Oxford campuses only. The analysis goes on to exclude students who are known to live outside Oxford (section 4.4)

### **3.3.2 Student numbers**

The HESA data for 2015/16 showed that Oxford Brookes University had 10,018 full-time students, and their online survey response suggested that they had 2,077 part-time students on 1<sup>st</sup> December 2015.

Not all of these students will require accommodation. According to the online survey response, Oxford Brookes University are aware that 521 of its full-time students were already residents of the city before starting their courses and that some students live outside the city and commute for classes. Although Oxford Brookes University was not able to say how many students this applies to, the address data supplied by the university showed that there are 778 students who selected 'Parental home' as their accommodation type who live outside Oxford, and 1,144 students who selected 'Own permanent residence owned or rented by you' who also live outside Oxford (section 4.4).

### **3.3.3 Accommodating students**

Of the students requiring accommodation in Oxford, Oxford Brookes University provides (or facilitate) accommodation and students also make their own arrangements.

Oxford Brookes University owns (or long-term leases) PBSA that houses 3,775 students. In addition, Oxford Brookes University short-term leases accommodation used for 108 students. Further, Oxford Brookes University rents ordinary housing stock from private owners to use as student accommodation; 96 houses or flats are leased, which accommodate 355 students.

Oxford Brookes University has formal nomination arrangements with local landlords, which accommodates 1,048 students. Oxford Brookes University does not have informal arrangements with landlords to accommodate students and do not make homestay arrangements.

Oxford Brookes University did not estimate how many students arrange their own accommodation.

Across all the different forms of university provided accommodation, postgraduate and undergraduate students are accommodated in the following ways (Table 5).



	Self-contained studio flats	En suite bedrooms	Bedrooms with shared facilities	Total
Postgraduate taught or research	21 (3%)	444 (74%)	137 (23%)	602 (100%)
Undergraduate degree courses	84 (2%)	2,826 (65%)	1,408 (33%)	4,318 (100%)
Other courses	3 (1%)	243 (65%)	125 (34%)	371 (100%)
<b>Total</b>	108 (2%)	3,513 (66%)	1,670 (32%)	5,291 (100%)

Table 5: The number, and type, of accommodation units provided by Oxford Brookes University

The table demonstrates that postgraduate students are more likely than undergraduates and others to be accommodated in self-contained flats and less likely to be accommodated in bedrooms with shared facilities. This would suggest that colleges view the accommodation needs of postgraduate students differently from other student groups. Further, Oxford Brookes University are aware that some of their students have partners or families and may therefore have different housing requirements, however, they were unable to quantify this.

### 3.3.4 Future plans

Oxford Brookes University intends to expand its activities in Oxford over the next five to ten years. As an institution, it planned to increase at a rate of between one and two per cent, per annum over the next five to ten years, however, it was accepted that this may not be achieved each year.

Oxford Brookes University was asked to provide information on how it intends to provide accommodation over the next five to ten years. Two different responses were given and are detailed in Table 6. This suggests that there is no consistent corporate view on how Oxford Brookes University intends to provide student accommodation over the next five to ten years.

Response	Proportion (%) of students planned to be accommodated in:				
	PBSA on college's main site	PBSA elsewhere in the city, owned by college	PBSA elsewhere in the city, leased by college	Arrangements with private landlords	Students' own arrangements
1	30	15	10	5	40
2	12	10	15	3	60

Table 6: Oxford Brookes University's plans for accommodating students in five to ten years

The main difference between these two projections is driven by the amount of PBSA that will be owned by Oxford Brookes University in five to ten years' time (either on the main site or elsewhere in Oxford). In the first response, Oxford Brookes University would be able to accommodate 45 per cent of its students in PBSA that it owns, compared to a projection of 22 per cent in the second response. Both respondents foresee similar proportions of use of leased student accommodation and the use of arrangements with private landlords; as such

the responses differ again in the remainder of students who will need to make their own arrangements for accommodation.

## 3.4 Other education institutions

### 3.4.1 Overview

Information was primarily collected from an online survey of other educational institutions in Oxford (completed by 14 institutions). In addition, a shortened version of the online survey was developed to gather information by telephone for those institutions unwilling or unable to complete the online survey (this option was used by a further nine institutions).

To boost participation amongst educational institutions, reminder emails, letters and telephone calls were made over a period of six weeks. Despite this, 16 educational institutions did not respond (four summer schools, 10 language school and two colleges). In addition, three institutions responded only to refuse to participate. Overall, this gives a response rate of 55 per cent.

Of the responding institutions, 10 were language schools, six were summer schools and seven were independent colleges, sixth forms or schools.

These educational institutions in Oxford offered a wide range of courses across all age ranges (Table 7).

Type of institution	Type of course	Age ranges				
		Under 16	16-18	18-21	21-24	Over 24
Language schools	Undergraduate degree or diploma courses			✓		
	Foundation year courses		✓	✓	✓	✓
	Preparation for university courses			✓		
	A level/IB courses		✓	✓		
	GCSE or similar	✓	✓			
	Language courses		✓	✓	✓	✓
Summer schools	Preparation for university courses	✓	✓	✓	✓	
	A level/IB courses		✓			
	Language courses	✓	✓			
Independent colleges, sixth forms or schools	A level/IB courses		✓	✓	✓	✓
	GCSE or similar	✓	✓	✓	✓	
	Language courses		✓	✓	✓	✓
	Other	✓	✓	✓	✓	✓

Table 7: The types of courses offered by different types of educational institutions, and the ages of students on these courses

'Other' courses were unspecified, but all were linked to one institution (City of Oxford College).

The table shows that language schools predominantly run courses for those aged up to 21 (but do admit older students), summer schools cater for students aged 18 or under (but aim preparation for university courses at slightly older students) and the independent colleges, sixth forms and schools have students across the age ranges.

### 3.4.2 Student numbers

The size of these institutions varied widely, from ten students at a time up to 14,967. Table 8 shows the size of these institutions in Oxford:

Maximum number of students	Frequency
50 or fewer	2
51-150	6
151-250	6
251-350	2
351-800	3
More than 800	2
Total	21

Table 8: The maximum likely number of students in the institution at any one time

All responding institutions were asked for the maximum likely number of students they have on courses at any one time. Simply adding these student numbers together reaches a total of 20,892 students. However, the maximum number of students in Oxford at any one time will be lower than this as the students are not all in the city at the same time. For example, some institutions operate at a higher capacity during the university holidays, the summer schools only run at these times, and some run courses in term time only.

Figure 1 shows the number of students in each type of educational institution.

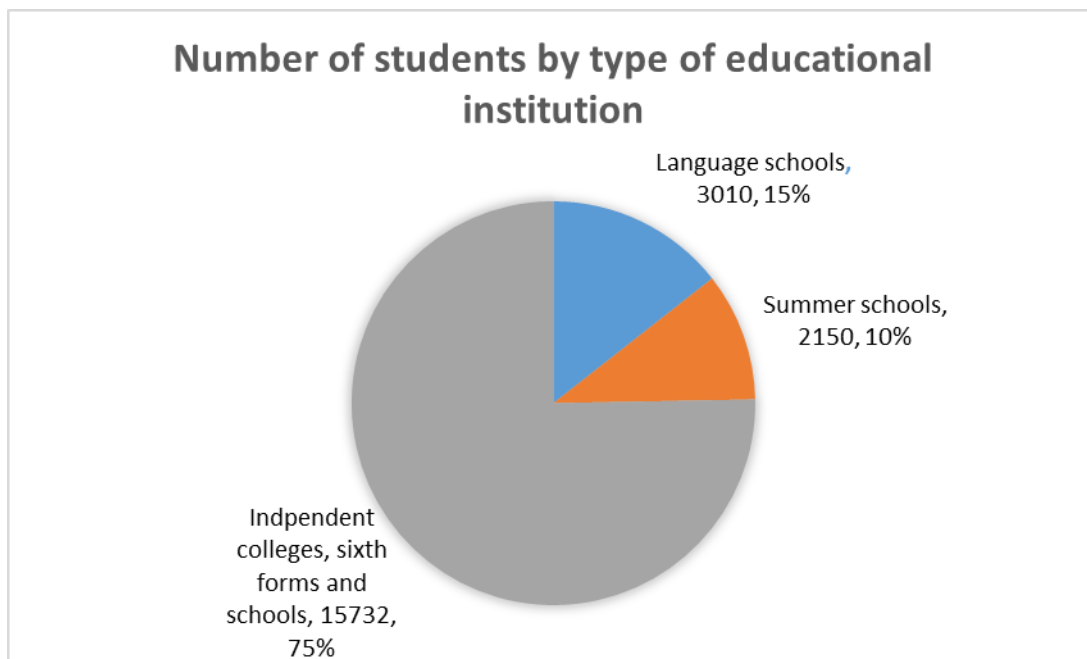


Figure 1: The number, and proportion, of students in each type of educational institution

As noted, not all educational institutions in Oxford will have students at the same time (or have their maximum capacity of students at all times). The summer schools run during the holidays, but many of the language schools and independent colleges, sixth forms and schools run course throughout the year (however, they may not be at full capacity throughout the year). These issues make it problematic to estimate how many students may

be in Oxford at any one time, but it is logical to assume that this will be fewer than the sum of the capacities of the institutions.

Based on the information provided by institutions, we estimate that around 11,500 students are on courses that last at least one academic year.

Not all of the students attending these institutions live in Oxford or require accommodation for the duration of their course. For the independent colleges, sixth forms and schools, e.g. City of Oxford College, students may already live locally, with only those new to the city requiring new accommodation. Whilst not all institutions knew how many students already lived in Oxford, those who could estimate suggested that at least 2,645 did so. City of Oxford College did not hold data on the accommodation of 9,673 students. However, from examining the courses on offer, we are assuming that these students either live in their own or their parental home in the city, or commute from outside the city. Therefore, we estimate that 12,318 students do not require accommodation for the duration of their courses because they already live in the city in their own or their parental home.

Some institutions were aware of students living outside Oxford and commuting into the city for their courses. Again, whilst not all institutions knew how many commuted, those who could estimate suggested 2,988 students did so.

From the information provided by most of the institutions, it is possible to estimate the number of students who require some form of accommodation in Oxford in relation to the institutions on which we have data. Using the information supplied on numbers of students in different types of accommodation arranged or provided by the institution (and any information on how many students make their own arrangements), we estimate that approximately 5,586 students of other educational institutions require accommodation of some form (Table 9). This is around 27 per cent of the maximum number of students who could attend these institutions.

Sum of the capacities of other educational institutions in Oxford	20,892
Students not requiring accommodation: Commuters	2,988
Students not requiring accommodation: Other – e.g. living in the parental home, already living in the city prior to starting a course	12,318
Students requiring accommodation in Oxford	5,586

Table 9: Estimate of students requiring accommodation in Oxford

### 3.4.3 Accommodating students

Some institutions accommodate some or all of their students in a way that does not increase the overall pressure on the housing market, by using existing stock efficiently. Institutions achieved this by using existing PBSA owned by other institutions during the holidays, e.g. university accommodation, or by making homestay arrangements for students.

The six summer schools who responded only used existing accommodation (from independent colleges or university accommodation) that was vacant during the holidays. This means that the existing accommodation for term-time students is being used more effectively and for different student groups. The summer schools accommodate 2,150 students in university accommodation during the holidays.

Twelve institutions accommodate some, or all, of their students in homestay arrangements. Homestays arranged by educational institutions can accommodate 656 students per year. Taken together, the homestays and use of university accommodation in the holidays accommodates an estimated 2,806 students in the city.

Many of the other educational institutions in Oxford accommodate some, or all, of their students in PBSA either owned or leased by the institution. Six educational institutions in Oxford own, or long-term lease, some PBSA and this accommodates 530 students. Eight institutions short-term lease PBSA (including the use of university college accommodation by summer schools) and this accommodates 1,504 students.

Finally, other educational institutions in Oxford are aware of some students who arrange their own accommodation. Using the information provided by the institutions, we estimate that 139 students make their own arrangements, independently of the institution.

Overall, from the information provided, the other educational institutions accommodate all but 13 per cent of those students requiring it (Figure 2).

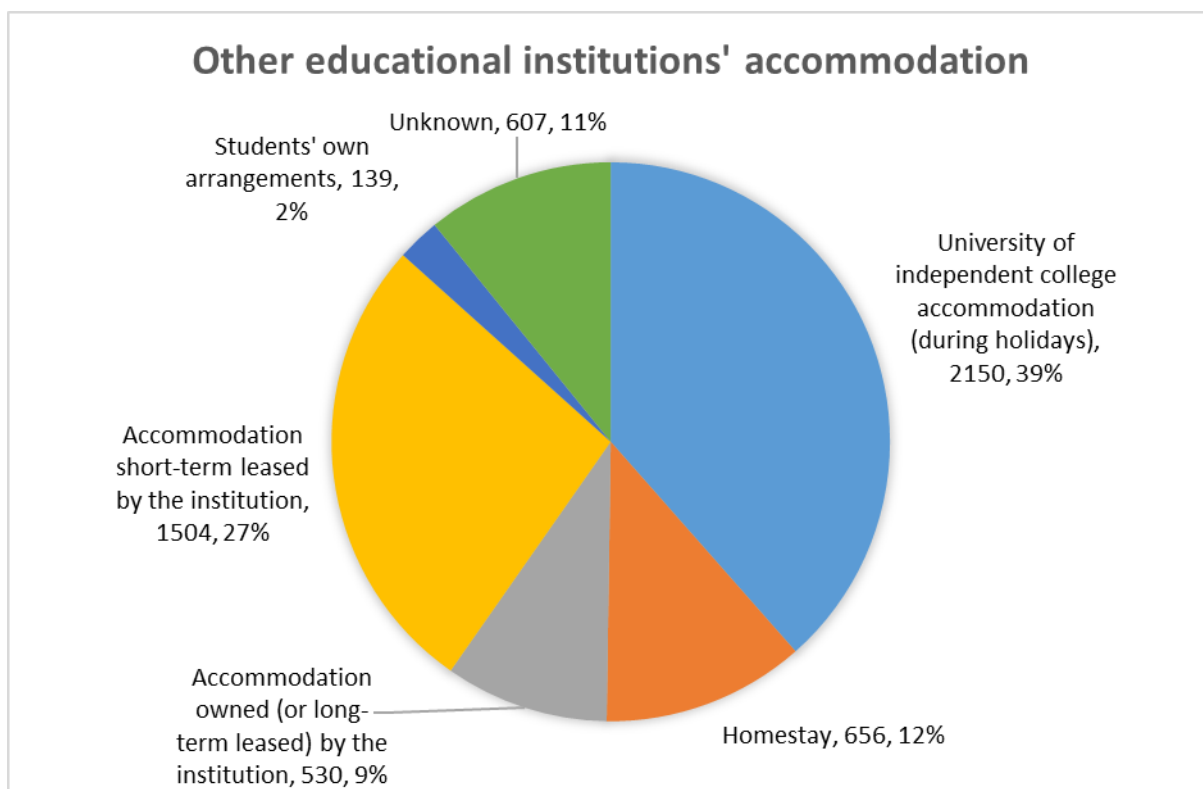


Figure 2: How educational institutions accommodate students

### 3.4.4 Future plans of institutions

The survey asked about future plans for expansion (or decline). Of those who responded, seven institutions planned to stay the same size over the next five to ten years and seven institutions intended on increasing their activities in Oxford over the same period.

Where plans to expand were indicated, not all provided details about the expected rate of expansion, and the plans that were given showed wide variations (Table 10). Expansions plans may be aspirational and not necessarily achieved.

Institution	Expansion rate by course				
	Foundation	Preparation for university	A level or IB	GCSE	Language
Summer Boarding Courses					15%
Oxford Summer Courses		300%			500%
King's Oxford	15%		15%		15%
Cherwell College Oxford			50%	50%	

Table 10: Other educational institutions' rates of growth by course type

Summer Boarding Courses plan to increase their language student numbers by 15 per cent. Summer Boarding Courses currently has 700 students on language courses, which would lead to an additional 105 students and a total of 805 students in five to ten years' time.

Oxford Summer Courses intend to increase numbers of preparation for university and language students by 300 per cent and 500 per cent, respectively. Oxford Summer Courses currently have 600 students on preparation for university courses, so the increase would result in an additional 1,800 students. Oxford Summer Courses currently have 50 language students, so an increase of 500 per cent would lead to an additional 250 students. Overall, Oxford Summer Courses would have a yearly total of 2,850 students in five to ten years' time.

King's Oxford plan to increase the number of foundation, A level and language course students by 15 per cent each. King's Oxford currently have 72 foundation students, 57 A level students and 125 language students; a 15 per cent increase would result in an extra 11 foundation, nine A level and 19 language students. King's Oxford currently have 350 students, which would increase to 389 students in five to ten years' time.

Cherwell College Oxford intend to increase the number of A level and GCSE students by 50 per cent each. Cherwell College Oxford currently have 47 A level and 4 GCSE students; a 50 per cent increase would lead to an extra 24 A level and two GCSE students. Cherwell College Oxford currently has 200 students, rising to 226 in five to ten years' time.

Across these institutions, if future plans for growth are achieved, this could mean a further 2,220 students taking courses in other educational institutions in Oxford. This does not take account of any additional students in the institutions that suggested they would expand, but could not quantify by how much.

Summer Boarding Courses (105 additional students) and Oxford Summer Courses (2,050) are likely to accommodate these additional students in existing arrangements with universities to use their accommodation during the holidays.

The additional 65 students associated with the other educational institutions listed are likely to lead to an increase in demand for student housing in Oxford.

### **3.4.5 Future accommodation plans**

The institutions were asked how their total student accommodation is likely to be provided in five to ten years' time.

Cherwell College Oxford intends to accommodate all of its students PBSA (that is owns) on its main site.

St. Clare's International College plans to accommodate half of its students in PBSA (that it owns) on its main site and the other half of students will make their own arrangements.

Oxford Summer Courses intends to accommodate half its students in PBSA that it owns (but is not on its main site) and the other half in PBSA that it leases.

King's Oxford intends to accommodate 70 per cent of its students in PBSA that it leases; King's Oxford did not stipulate how it plans to accommodate the remainder of its students.

City of Oxford College plans for all its students to make their own arrangements in five to ten years' time.



## 4 Existing and future projected 'shortfall' of PBSA

### 4.1 Estimating the 'shortfall' of PBSA

This section provides estimates of the potential 'shortfall' of student accommodation in the city, the extent to which this 'shortfall' is currently met by the use of existing 'street' housing stock as shared housing for students, and the extent to which this might be released into the open housing market if more PBSA were available.

The estimated 'shortfall' is the amount of PBSA that could accommodate all of the students who are not currently housed by their educational institution, and living in existing family housing shared with other students.

This section also provides an estimate for the effect of planned growth in the university sector to 2026. Oxford Brookes University's overall strategy plans for growth of between one percent and two percent per annum over the next ten years, while the University of Oxford envisages growth but does not express any numeric target in its Strategy 2013-18. This report has therefore modelled growth at the University of Oxford on a similar scale to that envisaged at the University of Cambridge: half of one percent for undergraduates and two percent for postgraduates. Data for 2010-2015 are on the University of Oxford website: undergraduate numbers fell from 11,723 to 11,603 (98.98%) while postgraduate numbers rose from 9,327 to 10,499 (112.56%), a compound growth rate of 2.4% per annum. This suggests that the assumptions used to model growth are reasonable.

The data analysis made assumptions about the average number of students in a shared property. The Housing and Employment Land Availability Assessment (HELAA) has taken the average number of students per house as 5<sup>7</sup> (Section 1.3.7). Therefore, this report also assumes that the average number of students in a shared property is 5.

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<sup>7</sup>[https://www.oxford.gov.uk/downloads/file/2985/housing\\_and\\_economic\\_land\\_availability\\_assessment\\_october\\_2016\\_report](https://www.oxford.gov.uk/downloads/file/2985/housing_and_economic_land_availability_assessment_october_2016_report)

## 4.2 The baseline position

The table below (Table 11) repeats the estimate of the baseline position in 2015/16, from Table 1 above, for ease of reference.

Baseline: 2015/16 student accommodation: numbers of students										
		Purpose Built Student Accommodation		Shared existing housing		Existing family housing		No information		Total
		University / College maintained *	Private halls	Other rented	Own home **	Parental / guardian home ***	Homestay	Other	Not known	
<b>University of Oxford</b>	Undergraduate	9230	0	1585	129	25		62	31	<b>11062</b>
	Postgraduate (1 year)	2140	0	833	189	49		68	4	<b>3283</b>
	Postgraduate (2+ years)	3001	0	1915	612	72		168	28	<b>5796</b>
	<b>Subtotal</b>	<b>14371</b>	<b>0</b>	<b>4333</b>	<b>930</b>	<b>146</b>		<b>298</b>	<b>63</b>	<b>20141</b>
<b>Oxford Brookes University</b>	Undergraduate	3579	1001	3532	229	178		0	443	<b>8962</b>
	Postgraduate (1 year)	414	19	329	58	14		0	24	<b>858</b>
	Postgraduate (2+ years)	99	19	14	40	6		0	20	<b>198</b>
	<b>Subtotal</b>	<b>4092</b>	<b>1039</b>	<b>3875</b>	<b>327</b>	<b>198</b>	<b>0</b>	<b>0</b>	<b>487</b>	<b>10018</b>
<b>Total Universities</b>	Undergraduate	12809	1001	5117	358	203		62	474	20024
	Postgraduate (1 year)	2554	19	1162	247	63		68	28	4141
	Postgraduate (2+ years)	3100	19	1929	652	78		168	48	5994
	<b>Total Universities</b>	<b>18463</b>	<b>1039</b>	<b>8208</b>	<b>1257</b>	<b>344</b>	<b>0</b>	<b>298</b>	<b>550</b>	<b>30159</b>
<b>Non-university institutions</b>		2150	2034	139	12318		656	0	607	17904
	<b>Total all institutions</b>	<b>20613</b>	<b>3073</b>	<b>8347</b>	<b>13919</b>		<b>656</b>	<b>298</b>	<b>1157</b>	<b>48063</b>
		* includes 384 bedspaces managed but not owned by OBU								
		** excludes 1,144 with own home outside Oxford								
		*** excludes 1,922 living in parental home outside Oxford								

Table 11: The baseline position of number of students 2015/16

### 4.3 Estimating the current 'shortfall' of PBSA

The table below (Table 12) summarises the overall position for university student accommodation in the city.

The table presents an estimate of the 'shortfall' in PBSA which, if built, would absorb all students currently living in shared houses in the city (including in this category both 'other rented' and 'own home'). The estimate is calculated by deducting from the total number of students:

- All those already living in PBSA.
- All those currently living in the parental home.
- All those for whom there is no information (848 students, or 3% of the total 30,159).

This suggests that **providing 9,465 bed spaces in PBSA would allow the return of all shared houses currently occupied by students to the open market.**

The number of houses that might be released is dependent upon the average number of students living in each shared house. If there are 5 students on average in each shared house, then 1,893 houses could be returned to the open market.

Two universities: summary of existing accommodation at 2015/16 and 'shortfall' of PBSA										
	Total	Purpose Built Student Accommodation		Shared existing housing		Existing family housing		No information		PBSA shortfall
		University / College maintained *	Private halls	Other rented	Own home	Parental / guardian home	Homestay	Other	Not known	
Undergraduate	20024	12809	1001	5117	358	203	0	62	474	5475
Postgraduate (1 year)	4141	2554	19	1162	247	63	0	68	28	1409
Postgraduate (2+ years)	5994	3100	19	1929	652	78	0	168	48	2581
<b>Total</b>	<b>30159</b>	<b>18463</b>	<b>1039</b>	<b>8208</b>	<b>1257</b>	<b>344</b>	<b>0</b>	<b>298</b>	<b>550</b>	<b>9465</b>

Table 12: Maximum potential 'shortfall' in PBSA (excluding OBU students known to live outside of Oxford)

The estimate in the table above is clearly a 'maximum' position, which assumes that all students, irrespective of their age, type of course, or personal preferences, would choose to live in PBSA if it were available. It also assumes that the students who self-reported that they live in 'other rented' accommodation and their 'own home' currently share housing.

The two universities have different characteristics, and the next sections present the detailed analysis of the estimates for Oxford Brookes University and the University of Oxford separately.

#### 4.4 Oxford Brookes University

The tables below show data for students at Oxford Brookes University who are studying at the Oxford campuses. The tables show four scenarios:

1. The current term time accommodation for all students based at the Oxford Brookes University Oxford campus.
2. The current term time accommodation of all students based at the Oxford campus and who currently live in Oxford.
3. Projected growth in numbers to 2026, assuming a growth rate of 1% per annum across all student types, and assuming that students continue to be accommodated in proportion to their current accommodation types.
4. Projected growth in numbers to 2026, assuming a growth rate of 2% per annum across all student types, and assuming that students continue to be accommodated in proportion to their current accommodation types.

The first table (Table 13) shows the current baseline position at 2015/16 for all students attending the Oxford campuses, together with estimates of the numbers of existing houses in the city that might be occupied by students sharing.

Oxford Brookes University: current baseline @ 2015/16, with numbers of shared houses								
	Total	University owned	Private halls	Other/not known	Parental home	Own home	Shared housing (student numbers)	Shared housing (numbers of houses) @ 5 students per house
Undergraduate	10429	3579	1001	443	798	1076	3532	706
Postgraduate (1 year)	1194	414	19	24	136	272	329	66
Postgraduate (2+ years)	497	99	19	20	42	123	194	39
<b>Total</b>	<b>12120</b>	<b>4092</b>	<b>1039</b>	<b>487</b>	<b>976</b>	<b>1471</b>	<b>4055</b>	<b>811</b>

Table 13: Oxford Brookes University estimated number of students in shared houses

If an average of 5 students share each house, the 4,055 students that are sharing accommodation with others would be occupying 811 existing houses within the city.

The second table (Table 14) presents an estimate of the 'shortfall' in PBSA which, if built, would absorb all students currently living in shared houses in the city (including in this category both 'other rented' and 'own home'). The estimate is calculated by deducting from the total number of students:

- All those already living in PBSA.
- All those currently living in the parental home.
- All those for whom there is no information (487 students, or 4% of the total 12,120).

Oxford Brookes University: current baseline @ 2015/16, with PBSA shortfall								
	Total	University owned	Private halls	Other/not known	Parental home	Own home	Shared housing (student numbers)	PBSA shortfall
Undergraduate	10429	3579	1001	443	798	1076	3532	4608
Postgraduate (1 year)	1194	414	19	24	136	272	329	601
Postgraduate (2+ years)	497	99	19	20	42	123	194	317
<b>Total</b>	<b>12120</b>	<b>4092</b>	<b>1039</b>	<b>487</b>	<b>976</b>	<b>1471</b>	<b>4055</b>	<b>5526</b>

Table 14: Oxford Brookes University potential maximum 'shortfall' in PBSA

The table suggests that if all students currently selecting 'Own permanent residence owned or rented by you' or 'Other rented accommodation (shared with others on a temporary basis)' were to be housed in PBSA, then some 5,500 additional bed spaces would have to be provided. This would more than double the number of bed spaces in PBSA currently available to Oxford Brookes University students.

However, from address data held by OBU, there are 778 students who selected 'Parental home' as their accommodation type who live outside Oxford, and 1,144 students who selected 'Own permanent residence owned or rented by you' who also live outside Oxford.

On the assumption that these groups would not move into Oxford if more PBSA were available, then the number of students requiring accommodation in Oxford would reduce, as shown in the table below (Table 15).

Oxford Brookes University: current baseline @ 2015/16, with numbers of shared houses								
	Total	University owned	Private halls	Other/not known	Parental home in Oxford	Own home in Oxford	Shared housing (student numbers)	Shared housing (numbers of houses) @ 5 students per house
Undergraduate	8962	3579	1001	443	178	229	3532	706
Postgraduate (1 year)	858	414	19	24	14	58	329	66
Postgraduate (2+ years)	378	99	19	20	6	40	194	39
<b>Total</b>	<b>10198</b>	<b>4092</b>	<b>1039</b>	<b>487</b>	<b>198</b>	<b>327</b>	<b>4055</b>	<b>811</b>

Table 15: Oxford Brookes University estimated number of students in shared houses, excluding students who live outside Oxford

The table (Table 15) shows that the number of students living in their parental home would reduce from 976 to 198, and the number living in 'Own permanent residence owned or rented by you' would reduce from 1,471 to 327.

It is possible that the number of undergraduates who live in 'Own permanent residence owned or rented by you' is overstated: some of these may be renting a property and subletting rooms in order to pay the rent, but the number of these is not known.

The table below (Table 16) shows that after allowing for students who are known to be living outside Oxford, the 'shortfall' of PBSA would shrink to around 4,400 bed spaces.

Oxford Brookes University: current baseline @ 2015/16, with PBSA shortfall								
	Total	University owned	Private halls	Other/not known	Parental home in Oxford	Own home in Oxford	Shared housing (student numbers)	<b>PBSA shortfall</b>
Undergraduate	8962	3579	1001	443	178	229	3532	<b>3761</b>
Postgraduate (1 year)	858	414	19	24	14	58	329	<b>387</b>
Postgraduate (2+ years)	378	99	19	20	6	40	194	<b>234</b>
<b>Total</b>	<b>10198</b>	<b>4092</b>	<b>1039</b>	<b>487</b>	<b>198</b>	<b>327</b>	<b>4055</b>	<b>4382</b>

Table 16: Oxford Brookes University potential maximum 'shortfall' in PBSA, excluding students who live outside Oxford

## 4.5 Growth in student numbers

Oxford Brookes University future strategy assumes growth of between one and two percent over the next ten years, and the table below shows the student numbers in 2026 resulting from a one percent per annum growth rate.

The table below assumes no increase in PBSA, with 'Other / not known', 'Parental home in Oxford' and 'Own home in Oxford' each increasing by one percent per annum, with the balance being made up by an increase in shared housing (excluding students not living in the city).

Oxford Brookes University: growth @1% p.a. by 2026, with numbers of shared houses								
	Total	University owned	Private halls	Other/not known	Parental home in Oxford	Own home in Oxford	Shared housing (student numbers)	Shared housing (numbers of houses) @ 5 students per house
Undergraduate	9895	3579	1001	489	192	253	4381	876
Postgraduate (1 year)	948	414	19	27	15	64	409	82
Postgraduate (2+ years)	418	99	19	22	7	44	227	45
<b>Total</b>	<b>11261</b>	<b>4092</b>	<b>1039</b>	<b>538</b>	<b>214</b>	<b>361</b>	<b>5017</b>	<b>1003</b>

Table 17: Oxford Brookes University estimated number of students in shared houses by 2026 at one percent growth

Table 17 shows that without any increase in PBSA the number of students living in shared houses would increase from the 2015/16 baseline of 4,055 to 5,017. This would lead to an increase in the number of shared houses in the city from 811 to 1,003 (assuming 5 students sharing each house).

The table below (Table 18) then shows the number of PBSA bed spaces that would have to be built, in addition to the 2015/16 baseline, in order to accommodate both the 'shortfall' at 2015/16 and the increase in student numbers to 2026.

Oxford Brookes University: growth @1% p.a. by 2026, with PBSA shortfall								
	Total	University owned	Private halls	Other/not known	Parental home in Oxford	Own home in Oxford	Shared housing (student numbers)	PBSA shortfall
Undergraduate	9895	3579	1001	489	192	253	4381	4634
Postgraduate (1 year)	948	414	19	27	15	64	409	473
Postgraduate (2+ years)	418	99	19	22	7	44	227	271
<b>Total</b>	<b>11261</b>	<b>4092</b>	<b>1039</b>	<b>538</b>	<b>214</b>	<b>361</b>	<b>5017</b>	<b>5378</b>

Table 18: Oxford Brookes University estimated PBSA 'shortfall' by 2026 based on current 'shortfall' and one percent growth in student numbers

Again, the table assumes that students living in 'Own home in Oxford' are in practice likely to be sharing with other students, and they are added to the number in shared housing to give the total PBSA required.

The table below (Table 19) shows the student numbers in 2026 resulting from a two percent per annum growth rate.

Again, the table below assumes no increase in PBSA, with 'Other / not known', 'Parental home in Oxford' and 'Own home in Oxford' each increasing by one percent per annum, with the balance being made up by an increase in shared housing.

Oxford Brookes University: growth @2% p.a. by 2026, with numbers of shared houses								
	Total	University owned	Private halls	Other/not known	Parental home in Oxford	Own home in Oxford	Shared housing (student numbers)	Shared housing (numbers of houses) @ 5 students per house
Undergraduate	10920	3579	1001	540	212	279	5309	1062
Postgraduate (1 year)	1046	414	19	29	17	71	496	99
Postgraduate (2+ years)	461	99	19	24	7	49	263	53
<b>Total</b>	<b>12426</b>	<b>4092</b>	<b>1039</b>	<b>593</b>	<b>236</b>	<b>399</b>	<b>6067</b>	<b>1213</b>

Table 19: Oxford Brookes University estimated number of students in shared houses by 2026 at two percent growth



The table shows that without any increase in PBSA the number of students living in shared houses would increase from the 2015/16 baseline of 4,055 to 6,067. This would lead to an increase in the number of shared houses in the city from 811 to 1,213 (assuming 5 students sharing each house).

The table below (Table 20) then shows the number of PBSA bed spaces that would have to be built, in addition to the 2015/16 baseline, in order to accommodate both the 'shortfall' at 2015/16 and the increase in student numbers to 2026.

<b>Oxford Brookes University: growth @2% p.a. by 2026, with PBSA shortfall</b>								
	<b>Total</b>	<b>University owned</b>	<b>Private halls</b>	<b>Other/not known</b>	<b>Parental home in Oxford</b>	<b>Own home in Oxford</b>	<b>Shared housing (student numbers)</b>	<b>PBSA shortfall</b>
<b>Undergraduate</b>	<b>10920</b>	<b>3579</b>	<b>1001</b>	<b>540</b>	<b>212</b>	<b>279</b>	<b>5309</b>	<b>5588</b>
<b>Postgraduate (1 year)</b>	<b>1046</b>	<b>414</b>	<b>19</b>	<b>29</b>	<b>17</b>	<b>71</b>	<b>496</b>	<b>567</b>
<b>Postgraduate (2+ years)</b>	<b>461</b>	<b>99</b>	<b>19</b>	<b>24</b>	<b>7</b>	<b>49</b>	<b>263</b>	<b>312</b>
<b>Total</b>	<b>12426</b>	<b>4092</b>	<b>1039</b>	<b>593</b>	<b>236</b>	<b>399</b>	<b>6067</b>	<b>6466</b>

Table 20: Oxford Brookes University estimated PBSA 'shortfall' by 2026 based on current 'shortfall' and two percent growth in student numbers

Again, the table assumes that students living in 'Own home in Oxford' are in practice likely to be sharing with other students, and they are added to the number in shared housing to give the total PBSA required.

## 4.6 University of Oxford

The table below (Table 21) shows the baseline position in 2016/16 and potential number of shared houses currently occupied by University of Oxford students.

University of Oxford: current baseline @ 2015/16								
	Total	University / College owned	Private halls	Other/not known	Parental home	Own home	Shared housing (student numbers)	Shared housing (numbers of houses) @ 5 students per house
Undergraduate	11062	9230	0	93	25	129	1585	317
Postgraduate (1 year)	3283	2140	0	72	49	189	833	167
Postgraduate (2+ years)	5796	3001	0	196	72	612	1915	383
<b>Total</b>	<b>20141</b>	<b>14371</b>	<b>0</b>	<b>361</b>	<b>146</b>	<b>930</b>	<b>4333</b>	<b>867</b>

Table 21: University of Oxford estimated number of students in shared houses

The table contains a number of key assumptions:

1. It should be noted that these figures for shared housing are for the numbers of students that had selected 'Other rented accommodation (shared with others on a temporary basis)' only, and do not include any that had selected 'Own permanent residence owned or rented by you'.
2. The numbers selecting 'Other rented accommodation (shared with others on a temporary basis)' are assumed to be arranging their own accommodation, rather than living in shared houses owned by their college.
3. If an average of 5 students share each house, the 4,333 students that are sharing accommodation with others would be occupying 867 existing houses within the city.

The proportion of students selecting 'Own permanent residence owned or rented by you' and 'Other rented accommodation (shared with others on a temporary basis)' are:

- Undergraduates 6%
- Postgraduates on 1 year courses 15%
- Postgraduates on 2+ year courses 41%

The second table (Table 22) presents an estimate of the 'shortfall' in PBSA which, if built, would absorb all students currently living in shared houses in the city (including in this category both 'other rented' and 'own home'). The estimate is calculated by deducting from the total number of students:

- All those already living in PBSA.
- All those currently living in the parental home.

- All those for whom there is no information (361 students, or less than 2% of the total 20,141).

University of Oxford: current baseline @ 2015/16								
	Total	University / College owned	Private halls	Other/not known	Parental home	Own home	Shared housing (student numbers)	PBSA shortfall
Undergraduate	11062	9230	0	93	25	129	1585	1714
Postgraduate (1 year)	3283	2140	0	72	49	189	833	1022
Postgraduate (2+ years)	5796	3001	0	196	72	612	1915	2527
<b>Total</b>	<b>20141</b>	<b>14371</b>	<b>0</b>	<b>361</b>	<b>146</b>	<b>930</b>	<b>4333</b>	<b>5263</b>

Table 22: University of Oxford potential maximum 'shortfall' in PBSA

The table suggests that if all students currently selecting 'Own permanent residence owned or rented by you' or 'Other rented accommodation (shared with others on a temporary basis)' were to be housed in PBSA, then some 5,250 additional bed spaces would have to be provided, in addition to the existing provision of 14,371.

It is possible that the number of undergraduates who live in 'Own permanent residence owned or rented by you' is overstated: some of these may be renting a property and subletting rooms in order to pay the rent, but the number of these is not known, i.e. they may be in shared housing. To the extent to which students are owning, or renting, their own independent accommodation, the estimated amount of additional PBSA would reduce.

As stated in the introduction to this section of the report, in the Strategic Plan 2013-18, the University of Oxford envisages growth but does not express any numeric target. This report has therefore modelled growth at the University of Oxford on a similar scale to that envisaged at the University of Cambridge: half of one percent for undergraduates and two percent for postgraduates. Data for 2010-2015 are on the University of Oxford website: undergraduate numbers fell from 11,723 to 11,603 (98.98%) while postgraduate numbers rose from 9,327 to 10,499 (112.56%), a compound growth rate of 2.4% per annum. This suggests that the assumptions used to model growth are reasonable.

The table below (Table 23) shows the increase in the numbers of students that would result by 2026 if the University's growth over period from 2015/16 were similar to that envisaged at the University of Cambridge, and if the categories of accommodation in private halls, other/not known, parental home and own home all grew in proportion to their current numbers. The balance of accommodation is then assumed to be provided either in shared housing or in additional PBSA.

University of Oxford: assumed growth at 2026								
	Total	University / College owned	Private halls	Other/not known	Parental home	Own home	Shared housing (student numbers)	Shared housing (numbers of houses) @ 5 students per house
Undergraduate	11628	9230	0	98	26	136	2138	428
Postgraduate (1 year)	4002	2140	0	88	60	230	1484	297
Postgraduate (2+ years)	7065	3001	0	239	88	746	2991	598
<b>Total</b>	<b>22695</b>	<b>14371</b>	<b>0</b>	<b>425</b>	<b>174</b>	<b>1112</b>	<b>6613</b>	<b>1323</b>

Table 23: University of Oxford estimated number of students in shared houses by 2026 with assumed growth

The table estimates that the number of students in shared housing would rise from the current 4,333 in 2015/16 to 6,613 by 2026. This would result in a rise in the number of shared houses from 867 in 2015/16 to 1,323 by 2026 (assuming an average of 5 students in each shared house).

The table below (Table 24) shows the resulting growth required in PBSA (over that already existing in 2015/16) if all students in shared housing, and all students living in 'Own permanent residence owned or rented by you', were able to find accommodation in PBSA.

University of Oxford: assumed growth at 2026: PBSA shortfall								
	Total	University / College owned	Private halls	Other/not known	Parental home	Own home	Shared housing (student numbers)	<b>PBSA shortfall</b>
Undergraduate	11628	9230	0	98	26	136	2138	<b>2274</b>
Postgraduate (1 year)	4002	2140	0	88	60	230	1484	<b>1714</b>
Postgraduate (2+ years)	7065	3001	0	239	88	746	2991	<b>3737</b>
<b>Total</b>	<b>22695</b>	<b>14371</b>	<b>0</b>	<b>425</b>	<b>174</b>	<b>1112</b>	<b>6613</b>	<b>7725</b>

Table 24: University of Oxford potential 'shortfall' in PBSA with assumed growth to 2026

The size of the 'shortfall' illustrated is crucially dependent upon any University or College owned PBSA being competitive in location, quality and price with the non-university accommodation currently occupied by students in the city.

#### 4.7 The age of students and accommodation type

Both universities have a significant proportion of full-time students aged 25 or over, and the age of students, and their stage in the household cycle, will have an impact upon the type of accommodation that might be required if all students were to be accommodated in PBSA rather than in the existing housing stock in the city

The table below (Table 25) shows the proportions of students aged 25 or more, and 30 or more, by student type and university.

<b>Both universities: numbers and percentages of students aged 25 and over and 30 and over, by student type</b>					
		Undergraduate	Postgraduate (1 year)	Postgraduate (2+ years)	Total
Oxford Brookes University	All students	10429	1194	497	<b>12120</b>
	number 25+	1536	447	365	<b>2348</b>
	% of student type	14.73%	37.44%	73.44%	19.37%
	number 30+	907	178	174	<b>1259</b>
	% of student type	8.70%	14.91%	35.01%	10.39%
University of Oxford	All students	11062	3283	5796	<b>20141</b>
	number 25+	355	2062	4048	<b>6465</b>
	% of student type	3.21%	62.81%	69.84%	32.10%
	number 30+	117	696	1499	<b>2312</b>
	% of student type	1.06%	21.20%	25.86%	11.48%

Table 25: Proportion of students aged 25 and over, and 30 and over at both universities

At Oxford Brookes University, nearly one fifth (19.37%) of all students were aged 25 or more, and one in ten (10.39%) was aged 30 or more, while at the University of Oxford, one third (32.1%) of all students were aged 25 or more, and one in ten (11.48%) was aged 30 or more.

The numbers of students aged 25 or more (6,465), and 30 or more (2,312), at the University of Oxford were much larger than those at Oxford Brookes University, reflecting the higher proportion of postgraduates at the University of Oxford.

It appears reasonable to assume that undergraduates aged 25 to 29, and postgraduates on one year courses and aged 25 or more, might be willing to share a house with other similar students, and that undergraduates aged over 30 and postgraduates aged over 25, and on courses of two or more years, might choose (and be able to afford) to live independently.

Many of the students aged 30 or more may already have partners, and many will also have children. If these households are already living in their own accommodation (probably in the wider Oxford area, rather than all within the city itself), then the number of students actually living in 'Own permanent residence owned or rented by you' will be larger than assumed in the baseline tables above (which assumed that all students selecting 'own home' were in reality sharing with others). This would reduce the assumed number of shared houses occupied by students that might be released into the open market if more PBSA became available.

In the case of Oxford Brookes University, which was able to supply address data for students, the numbers of students living outside Oxford in 'Own permanent residence owned or rented by you' are known (1,144) and these were deducted in Table 16 above to show the resulting reduction in the number of PBSA bed spaces required in the city.

#### 4.8 Utilisation of shared housing compared

The table below (Table 26) compares the extent to which each of the two universities utilises shared existing housing in the city.

Two universities: % of students living in shared houses in Oxford compared				
		Living in shared houses	Total student population	Students in shared houses as % of total
Oxford Brookes University	Undergraduate	3532	8962	39.41%
	Postgraduate (1 year)	329	858	38.34%
	Postgraduate (2+ years)	194	378	51.32%
	All postgraduate	523	1236	42.31%
	Total	4055	10198	39.76%
University of Oxford	Undergraduate	1585	11062	14.33%
	Postgraduate (1 year)	833	3283	25.37%
	Postgraduate (2+ years)	1915	5796	33.04%
	All postgraduate	2748	9079	30.27%
	Total	4333	20141	21.51%

Table 26: Proportion of students living in shared housing in both universities

The overall numbers of students accommodated in shared houses is fairly similar between the two universities, at 4,055 for Oxford Brookes University and 4,333 for the University of Oxford, but the types of students accommodated are significantly different.

The table shows that Oxford Brookes University houses more than twice as many undergraduates in shared housing in the city than the University of Oxford, reflecting the long history of the Colleges in providing accommodation for undergraduates.

However, in the case of postgraduate students, the proportions living in shared houses in the city are almost identical at 30% of all postgraduates, although the number of postgraduates of the University of Oxford living in shared housing is more than five times the number at Oxford Brookes University.

#### 4.9 Overall potential current and future ‘shortfall’ in university student accommodation

The table below (Table 27) summarises the current and potential ‘shortfall’ in student accommodation for the university sector.

<b>Overall shortfall in university student accommodation</b>		
	Current shortfall in PBSA @ 2015/16	Additional shortfall in PBSA @ 2026
Oxford Brookes University	4382*	1540**
University of Oxford	5263	2462
Total	9465	4002
*5526 including those living outside Oxford		
** midpoint of OBU growth scenarios		

Table 27: Current and potential ‘shortfall’ in PBSA for the university sector.

The table suggests that a total of 13,467 student rooms would have to be built in PBSA if the current and potential future ‘shortfalls’ in student accommodation are to be met.

This would accommodate all of the students who are not currently housed by their educational institution, and living in existing family housing shared with other students, therefore allowing the return of all shared houses currently occupied by students to the open market.

Meeting the current ‘shortfall’ through PBSA might release 1,893 houses, currently occupied by students sharing, into the open market.

If PBSA is not available to meet future growth, then by 2026, 754 additional existing houses would be converted into shared student accommodation in order to meet demand, as shown in the table below, leading to a total number of shared houses of approximately 2432.



Current occupancy of shared houses, and projected growth to 2026, if no PBSA built						
		Current (2015/16)		Growth to 2026		
		Student numbers in shared houses	Numbers of shared houses (@ 5 students per house)	Student numbers in shared houses*	Numbers of shared houses (@ 5 students per house)	Total shared houses by 2026
<b>Oxford Brookes University</b>	Undergraduate	3532	706	1313	263	<b>969</b>
	Postgraduate (1 year)	329	66	80	25	<b>91</b>
	Postgraduate (2+ years)	194	39	51	10	<b>49</b>
	<b>Subtotal</b>	<b>4055</b>	<b>811</b>	<b>1444</b>	<b>298</b>	<b>1109</b>
<b>University of Oxford</b>	Undergraduate	1585	317	553	111	<b>428</b>
	Postgraduate (1 year)	833	167	651	130	<b>297</b>
	Postgraduate (2+ years)	1915	383	1076	215	<b>598</b>
	<b>Subtotal</b>	<b>4333</b>	<b>867</b>	<b>2280</b>	<b>456</b>	<b>1323</b>
	<b>Total</b>	<b>8388</b>	<b>1678</b>	<b>3724</b>	<b>754</b>	<b>2432</b>

\* Midpoint of growth scenarios for Oxford Brookes University

Table 28: Use of shared houses in 2015/16 and 2026

The table summarises the current and projected numbers of shared houses occupied by both undergraduates and postgraduates, assuming that the average shared house contains five students.

The figures for Oxford Brookes University are from Table 15 and the midpoint of Tables 17 and 19, while the figures for the University of Oxford are from Tables 21 and 23.

The table shows that there might currently be some 1,250 shared houses occupied by 6,280 undergraduates and postgraduates on one year courses. The majority of these houses might be released into the open market if sufficient PBSA were to be built, although it is probable that some fourth year undergraduates, and those progressing on to a MPhil course, may continue to prefer to live in independent accommodation. As outlined above, this is also likely to be the case with many postgraduates on courses lasting two or more years, given their age and relative independence.

These estimates are heavily dependent upon the assumptions spelt out above concerning the numbers of students actually occupying 'Own permanent residence owned or rented by you', and the average numbers of students actually occupying shared houses.

## 5 Appendices

### 5.1 Note provided by the University of Oxford in relation to data supplied about the Colleges

**Conference of Colleges, in the University of Oxford  
Domestic Bursars' Committee**

**Covering note: colleges' responses to a survey undertaken for an assessment of student housing demand and supply for Cambridge City Council and Oxford City Council**

*Requester: Dr Gemma Burgess, Senior Research Associate, Cambridge Centre for Housing and Planning Research (email: glb36@cam.ac.uk; tel. 01223 764547)*

#### **A. Summary**

Following receipt of information regarding the above study, the Domestic Bursars' Committee (in the Conference of Colleges, University of Oxford) undertook a survey of colleges in November 2016 to enable the committee to respond on behalf of colleges to a series of questions identified by the Cambridge Centre for Housing and Planning Research. A copy of the requested questions is given in **Annexe A**. It was noted that data relating to some of these prompts was already held centrally on behalf of colleges either in the Conference of Colleges Secretariat or in the Planning, Resource, and Allocation Section of the University of Oxford.

In total, 32 colleges responded to the survey. The Executive of the Domestic Bursars' Committee has authorised for anonymised responses to be provided on behalf of those colleges that have chosen to respond to the survey, including relevant centrally collected information. The anonymised data is provided on the understanding that it will be utilised by the Cambridge Centre for Housing and Planning Research to support its assessment of student housing demand and supply for Oxford City Council (and for no other purpose), and that the data will subsequently be stored by the Oxford City Council. Should further details be required, requesters are invited to contact the Conference of Colleges Secretariat, which will be happy to liaise with individual colleges in order to request their consent to be interviewed further<sup>8</sup>.

As of November 2016, the relevant contacts within Secretariat include: Judith Finch, Director (Judith.finch@admin.ox.ac.uk, tel. 01865 280 769); and Anneli Chambliss Howes, Policy Advisor for Domestic and Operational Management (anneli.chambliss@admin.ox.ac.uk, tel. 01865 280 655).

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This covering note sets out a series of observations offered by colleges and colleagues in the process of compiling the data, including information not covered in the survey that may affect its analysis and interpretation. The committee would be very grateful if recipients of the data would note these issues.

## **B. Observations**

***Student numbers as at 1 December 2015.*** In line with the University's and Conference of Colleges' annual survey procedures, responses utilise student numbers as reported on 1 December 2015. Further data collection to update both student numbers and college accommodation unit figures will be undertaken in December 2016, in line with regular annual reporting.

***Status of visiting students and non-Oxford University students living in college accommodation.*** The survey of colleges has proceeded on the assumption that the questions asked refer to the accommodation of undergraduate and postgraduate students. However, concerns have been raised by colleges that the survey was unclear regarding how they might take into account accommodation offered to visiting and other recognised (and unrecognised) student categories. As of 1 December 2015, there were 500 recognised visiting students across all of the Oxford colleges (in addition to other categories of visitor or non-Oxford student). It should be noted that some colleges, but possibly not all, may have approached this question by including visiting students within their undergraduate and graduate accommodation figures.

***Status of part-time students.*** Colleges have noted that the needs of part-time students are quite different from those of full-time students, and concerns were noted that the treatment of part-time FTEs in the survey questions was unclear. Part-time students may already be resident in the city, or may commute from further afield. Their needs occasionally, but do not as frequently, include accommodation. Analysis is currently being undertaken within the Conference of Colleges regarding colleges' approaches to part-time student provision and student numbers. Where possible, colleges have been advised to **exclude** part-time students from their responses. However, it has been noted that a small number of colleges already offer all graduates (full-time and part-time students) accommodation in the first year, and that this may distort some of the numbers provided.

***Student numbers planning.*** The questions identified for this study have asked colleges to give an average per cent annual rate of expansion in student numbers that they anticipate overall for their postgraduates and undergraduates over the next five to ten years. Please note that while colleges hold data regarding their own long-term planning preferences, student numbers planning procedures are undertaken as a joint (collective) exercise between the Conference of Colleges and University, taking into account the wishes and limitations of both University departments and colleges. Annual student numbers planning procedures are facilitated by the Joint Student Numbers Planning Sub-Committee of Council, chaired by the Pro-Vice-Chancellor (Planning and Resources) and supported by the Planning and Resource Allocation Section of the University.

Recipients of the data area asked to note that **the annual expansion rates provided reflect colleges' preferences over the period 2016/17 to 2018/19** only, and that longer

term forecast figures are not available through current planning procedures. As noted above, the rates provided **exclude** part-time students.

***Nominations with the University Graduate Accommodation Office.*** As of 1 December 2015, the University of Oxford Graduate Accommodation Office (<https://www.admin.ox.ac.uk/graduateaccommodation/>) held an additional 824 units of accommodation. 410 units (including both flats and houses) were occupied by more than one student as at 1 December 2015. 376 of the units held by GAO were single study bedrooms. It should be noted that a number of colleges enter into nomination agreements with the GAO every year. As the office itself is not a private landlord, these units are frequently reported as 'college' accommodation. Similarly, colleges regularly direct postgraduate students whom they are unable to accommodate to seek accommodation from the GAO in the first instance.

***Students who make their own arrangements to find somewhere to live.*** Among the survey questions, estimates have been requested from colleges of the numbers of students making their own arrangements to find somewhere to live. Colleges have noted that the collegiate University's agreement with Oxford City Council on the cap on students residing outside of university-provided accommodation is 3,000 students. It was noted that the calculations required to achieve accurate college-by-college estimates in line with the terms of the agreement were beyond the scope of data held by individual colleges. This question is therefore left blank. Further information may be obtained from the Planning and Resource Allocation Section.

***Students who were residents within Oxford post codes before becoming students; students commuting from outside of City postcodes.*** Please note that in the responses given to these two questions, specific allowances have been made in the data to **exclude** students who are also members of staff, and students who live with their parents and therefore do not require accommodation. For the purposes of responding to these questions, 'Oxford post codes' are given as students living within (or commuting from outside of) the postcodes OX1, OX2, OX3, and OX4. Data on students in the other categories you request is collated by PRAS and forms part of the annual submission to Oxford City Council and is therefore already held by OCC.