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Manchester Student Strategy Final Report





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Contact details			
Main point of contact	Telephone number	Email address	Postal address
Patrick Ross	0161 902 1150	patrick.ross@tribalgroup.co.uk	Parkway House Palatine Road Manchester M22 4DB

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Executive summary

Background

1. The student population of Manchester – and indeed many other major conurbations in the UK – has grown considerably in recent years. The contribution made by students – culturally, economically and in terms of building the City's knowledge "capital" – is invaluable. Whilst students benefit the city as a whole, the negative impact of student populations is disproportionately felt in a limited number of key neighbourhoods. In some neighbourhoods in Manchester the student population dominates. In others the student population has been expanding. The prevalence and growth in student numbers influences a range of issues, with demand for housing / accommodation and neighbourhood management being arguably the most important of these. This strategy, which has been prepared under the guidance and leadership of a Steering Group consisting of Manchester City Council and the City's two universities, sets out a framework for addressing these issues and others that are closely linked.

Brief

2. The Consultants brief was developed by Manchester City Council, the University of Manchester and Manchester Metropolitan University. Its focus was to help these organisations to develop a greater understanding of the current situation and impact of the City's student population. That information has been used to inform a strategy development process which has two main foci: first, the provision and pattern of future student accommodation; and second the identification of opportunities for effective neighbourhood management to mitigate the negative impacts of student accommodation.

Key findings

3. The Consultants found that:
 - The negative impacts of a large student population disproportionately affect certain key neighbourhoods.
 - These concerns were mainly in relation to the impact of students living in shared houses amongst existing communities and the impact of growth and encroachment of those students on the environment and local economy.
 - Residents, students and stakeholders alike have also expressed concern about the absence of anyone supporting students in the community and a general lack of coordination in addressing student issues.
 - If there is a 'tipping point' (that is a point at which a neighbourhood becomes adversely affected by there being too many student households within it) it is very likely to be different in different neighbourhoods, and will be dependent on the house type and make up of other residents in the neighbourhood.
 - Studentification is also considered an issue in some other towns and cities, but initiatives to address it are in their early stages.
 - Student numbers in Manchester are forecast to grow at significantly slower rates than in recent years, and growth is forecast to be mainly made up of overseas students.
 - Many students have a strong preference for living in certain parts of Manchester.

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- In certain areas high levels of students have been established over a long period of time and this presents us with a real challenge to pursue new policies aimed at making these places more mixed/balanced communities.
- Demand for existing universities' student halls is generally high and purpose built student accommodation has grown in recent years, with specialist developers reporting that it has capacity to grow further.
- There is capacity in the market to accommodate additional purpose-built student accommodation. High-level analysis suggests the potential to increase the current level of halls bed spaces by between 10% and 20% over the next 5 years.
- The City Centre has increasingly played an important role in the provision of student accommodation in recent years.
- The negative impact on neighbourhoods of a fall in student numbers in certain areas requires further investigation.

Key Recommendations

4. The report sets out an integrated set of measures, which are designed to respond to and address the key findings and identified issues. It is recommended that, in order to have the maximum benefit, these measures are implemented as a complete package – rather than selectively.
5. Neighbourhood management improvements are required to bring a greater focus and co-ordination to the Council's (and their partners) response to student issues. They will also enable the two universities to bring a new focus to supporting their students living in the wider community and help them understand the impact their students have upon the neighbourhoods in which they live. Neighbourhood management improvements are also needed to provide clear and accessible points of contact and channels of communication for residents to raise issues and concerns.
6. Whilst dispersal of the student population around the City is not considered to be appropriate or achievable, there is a need to reduce pressure resulting from expansion in certain locations. Rather than significant intervention in the market in the core areas of student housing, the response should instead be to better manage some core areas, whilst concurrently working with the housing market and regeneration programmes to increase supply in other locations to achieve some shifts in the patterns of location.
7. The report therefore makes the following integrated package of recommendations:
 - **Strategy Response 1 - Develop and improve neighbourhood management approaches to areas with concentrations of student households** – There are certain areas which are likely to always be popular with students, and these should be managed appropriately. Applied to core and edge of 'core' areas of student households, this response proposes a range of neighbourhood management tools and approaches for consideration including: an Off-Campus Manager and Dedicated Council Officer; a Helpline; a student term time address database; a Student Area Management Steering Group / Neighbourhood Management Group; targeted neighbourhood management initiatives; Student Volunteers; and Community Forums. Lobbying for greater HMO controls in these areas will continue.
 - **Strategy Response 2 – Greater HMO controls** – This strategy response is currently being developed by Private Sector Housing in conjunction with Planning and will reflect the current position in HMO licensing.

- **Strategy Response 3 - Provide a better accommodation offer for students in appropriate locations** – There should be the provision of additional managed accommodation in locations accessible to the university campus, which would encourage a reduction in pressure on some neighbourhoods. This provision of additional managed accommodation should focus on sites within the main university area and on the fringe of the City Centre, Birley Fields and the Fallowfield campus. This strategy and any proposed locations should be reviewed after 5 years. The following criteria would be used to assess any proposal regarding purpose built student accommodation:
 - Sites should be easily accessible to the University campus by walking, cycling and public transport.
 - High density developments should be sited in locations where this is compatible with existing developments and where retail facilities are within walking distance. Proposals should not lead to an increase in on-street parking in the surrounding area.
 - Proposals should contribute to providing a mix of uses and support district and local centres, in line with relevant Strategic Regeneration Frameworks, local plans and other masterplans; and by closely integrating with existing neighbourhoods to contribute in a positive way to their vibrancy without increasing pressure on existing neighbourhood services to the detriment of existing residents.
 - Proposals should be designed to be safe and secure for their users, and avoid causing an increase in crime in the surrounding area. Consideration needs to be given to how proposed developments could assist in improving the safety of the surrounding area in terms of increased informal surveillance or other measures to contribute to crime prevention.
 - Consideration should be given to the design and layout of the student accommodation and siting of individual uses within the overall development in relation to adjacent neighbouring uses. The aim is to ensure that there is no unacceptable effect on residential amenity in the surrounding area through increased noise, disturbance or impact on the streetscene either from the proposed development itself or when combined with existing student accommodation.
 - Consideration should be given to provision and management of waste disposal facilities within the development at an early stage.
 - The developer will be required to demonstrate that there is a demand for additional student accommodation in terms of waiting lists for existing places.

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1 Introduction

- 1.1.1 Students benefit Manchester as a whole but the negative impact of student populations are disproportionately felt in a limited number of key neighbourhoods.
- 1.1.2 It is recognised that students and the universities make an important contribution to the City's economy, which includes a demand for services, shops, and housing whilst studying, and as potential future residents of the city who can contribute to its future prosperity and regeneration. However the large student population dominates some neighbourhoods in the Central and South Manchester Strategic Regeneration Framework (SRF) areas, including neighbourhoods within the wards of Rusholme, Old Moat, Withington and Fallowfield. This brings with it a number of issues including transience, changing demographics including a reduction in the number of families, significant proportions of private rented properties that are poorly maintained and high crime rates.
- 1.1.3 The presence of such a large body of students in some areas, and its encroachment in recent years on surrounding areas also has the capacity for bringing about change to the type of shops, bars and other amenities provided. As a result, over time, the character of some areas has changed, creating a degree of tension between the student population and other residents. In consultations (including those undertaken as part of the South Manchester SRF) significant numbers of residents, and their representatives, have raised concerns that the housing market is being further distorted by landlords acquiring and converting family housing for student use outside 'traditional student areas'.
- 1.1.4 Students do however provide a critical mass of residents to support a range of retail and other services in these neighbourhoods, although the significant population variance between term time and holiday periods presents issues for the local economy and also presents large gaps in the local community during this time. In addition, students are often isolated from other residents within their neighbourhood.
- 1.1.5 Therefore a range of targeted and intensive neighbourhood management approaches and initiatives are currently required, often at key times which relate to the academic year, to address a range of neighbourhood issues linked to areas with high levels of students accommodation.

1.2 Scope of services

- 1.2.1 The scope of services that were covered by this commission included:
- Analysis of student accommodation locations, choices, needs, demands and trends.
 - Analysis of student and student accommodation types.
 - Exploration of the opportunities and implications for developing a diversification/dispersal policy for student housing.
 - Identification of opportunities for effective neighbourhood management, mitigating negative impacts of student accommodation and minimising conflict between students and other residents.
 - A focused review of potential locations for purpose built student accommodation throughout the city.
 - Assessment of the funding required to deliver the strategy and potential funding sources to support it.

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- Recommendations on delivery, including the mechanisms, partnership arrangements and approaches required for delivery.

1.3 Methodology

- 1.3.1 The stages of the methodology used to develop this Strategy are set out below. The key elements of work within each of these stages are also described below:

Stage 1 – Baseline

- 1.3.2 A review of existing data and information from a variety of sources (including Council Tax exemptions data) as well as consultations with key stakeholders including the universities and letting agents and review of key strategy and context documents.

Stage 2 - Challenges & opportunities

- 1.3.3 This involved further consultation but also collection and analysis of market information, site survey, analysis of regeneration initiatives and a statistically representative web-based survey of students.

Stage 3 - Options development

- 1.3.4 A review of best practice in the City and elsewhere, area analysis, a review approaches to neighbourhood management, and development of initial options.

Stage 4 - Options appraisal & refinement

- 1.3.5 Appraisal of the options against the criteria, then refining and short-listing of these through meetings with Councillors, the Project Group and Steering Group and a Neighbourhood Management workshop

Stage 5 - Draft Strategy

- 1.3.6 Working up of detail of the preferred option/s in liaison with client group and key partners and producing recommendations

Stage 6 - Final Strategy & action plan

- 1.3.7 This involved further consultation and appropriate revisions to the draft strategy.
- 1.3.8 There were regular meetings held with the Project Group and Steering Group throughout the development of the strategy as well as meetings held with a range of stakeholder groups including relevant local residents' groups.

1.4 Note regarding Housing Market

- 1.4.1 The bulk of market research and analysis which underpins this report took place in the period from May to July 2008. There have however been significant changes in the economic climate, and more specifically the housing market, between then and when a revised report was produced in November 2008. The market is now currently in a position where it is very difficult to try and forecast likely further changes in the coming months. In view of such a rapidly changing market the Consultants have elected not to update all the market related information within this report but instead highlight the need for caution in relation to any market information with the report.

2 Current situation

2.1 Introduction

2.1.1 This section of the report sets out the baseline situation with regard to students in Manchester, including details in relation to: student numbers and types; student residential patterns as well as profiles of key centres of student population.

2.2 Student numbers and types

2.2.1 According the City Council's Manchester Factsheet there were 53,915 full time higher education students living in the Manchester City Council area in 2003/4 (HESA), making up 12.5% of the City's population.

2.2.2 This compares to students as a proportion of population in other cities (HESA)

- Nottingham 21.6%
- Southampton 19.4%
- Belfast 18.7%
- Newcastle 18.6%

2.2.3 Households made up entirely of students can claim exemption from paying Council Tax, and the address of each household is recorded. According to our analysis of the Council Tax data for 2007/8 there are 13,922 student exemption households in the City (this includes our assumption that every 7 students in a hall of residence constitutes a household). This accounts for 6.5% of the total households in the City of Manchester.

2.2.4 There were approximately 35,500 students at University of Manchester in 2007/8. These are broken down as follows:

- 70% undergraduate full time
- 4% part time undergraduates
- 18% full time post graduates
- 8% part time post graduates

2.2.5 There were 28,691 Manchester-based students at MMU (excluding Cheshire-based students) in 2007/8. These are broken down by level as follows:

- 73% undergraduate full time
- 10% part time undergraduates
- 7% full time post graduates
- 10% part time post graduates

2.2.6 Therefore the two universities attracted over 64,000 students to study at their Manchester campuses in 2007/8. Nearly 84% of those were full time students. Manchester University has a higher proportion of full time students than MMU (88% compared to 80%). These compare with a lower proportion of full time students nationally, with full-time

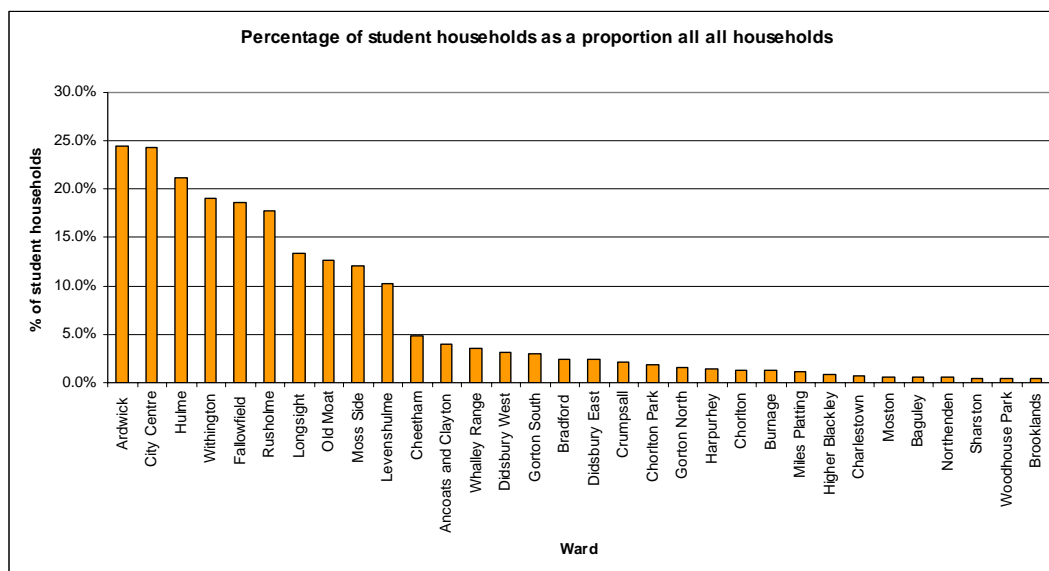
undergraduates making up only 46% of all UK HE students (HESA 2005/2006) and 40% of UK HE students being part-time (Universities UK 2005).

- 2.2.7 In terms of age, 27% of all MMU students are over 24 years old, with a slightly higher proportion (29%) of MMU first years being over 24, suggesting that the average age of their students may be getting older. The majority (64%) of those over 24 are on part-time courses. This compares to the UK generally where 59% of all students are mature – students who start a degree aged 21 or over (HESA 2003/4). Over 90% of the University of Manchester's full-time first degree entrants are under 21.

2.3 Where do students live?

- 2.3.1 According to our analysis of Council Tax data for 2007/8 the City Council Wards with highest concentrations of student households as illustrated in the following chart.

Figure 1 – Student Households by Ward



- 2.3.2 This shows 10 wards in the City having more than 10% student households, with the rest all having below 5%. Those 10 wards are Ardwick, City Centre, Hulme, Withington, Fallowfield, Rusholme, Longsight, Old Moat, Moss Side and Levenshulme. The three highest concentrations are in Ardwick, City Centre and Hulme where the levels exceed 20% (and in fact are closer to 25% in the former two).

- 2.3.3 When considering these figures (and indeed any other figures that are produced on a ward basis in this report) it needs to be understood that these wards do not always relate exactly to the neighbourhoods of the same names, as they are understood by local residents and others. Some also include substantial areas of social rented housing which will not generally be accessible to student households and several (Hulme, Ardwick and City Centre) actually include the main university campuses and their associated accommodation, and therefore will be affected by this, as university accommodation is included in their numbers.

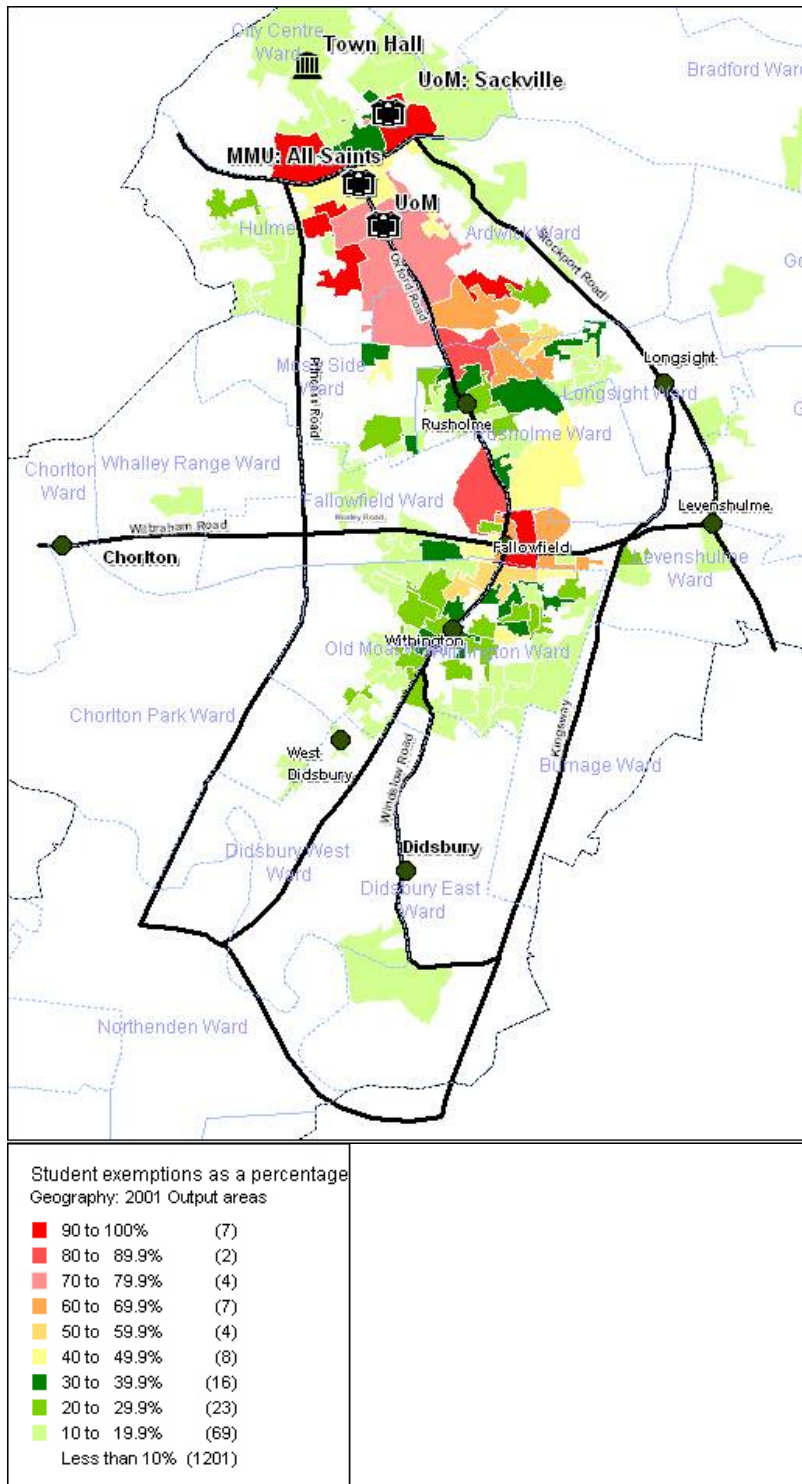
- 2.3.4 The City Centre ward has the highest absolute numbers of student households, with over 2,000. Hulme and Ardwick wards both have just over 1,600 and the remainder of the 'Top Ten' student wards have between 500 and 1,000 student households.

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- 2.3.5** In order to identify and consider the location of concentrations of student households in more detail, we mapped the Council Tax data to show the geographical concentrations of students by Super Output Area. As with the Ward data this highlights that student households are concentrated to the south of the City. In particular it further emphasises the focus around the main university campuses and south along the Wilmslow Road. An overview of this mapping is shown in the following plan:

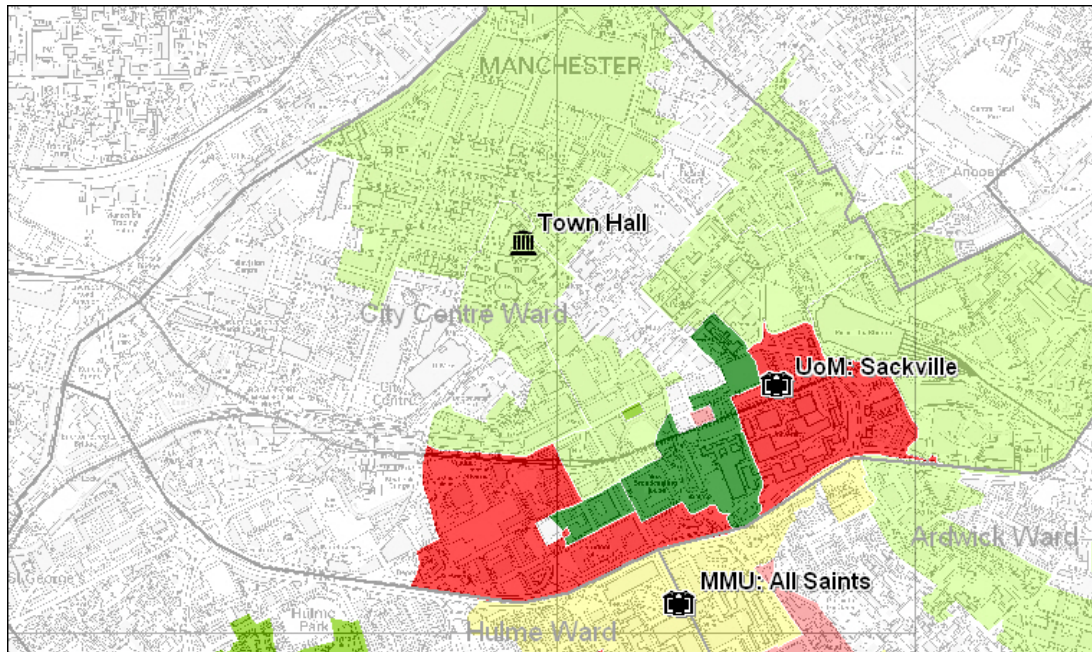
Figure 2 – Location of student households



- 2.3.6 There follows a more detailed analysis of this mapping for the key areas of concentration (running south along the Oxford Road / Wilmslow Road from the City Centre to Withington).

2.4 City Centre

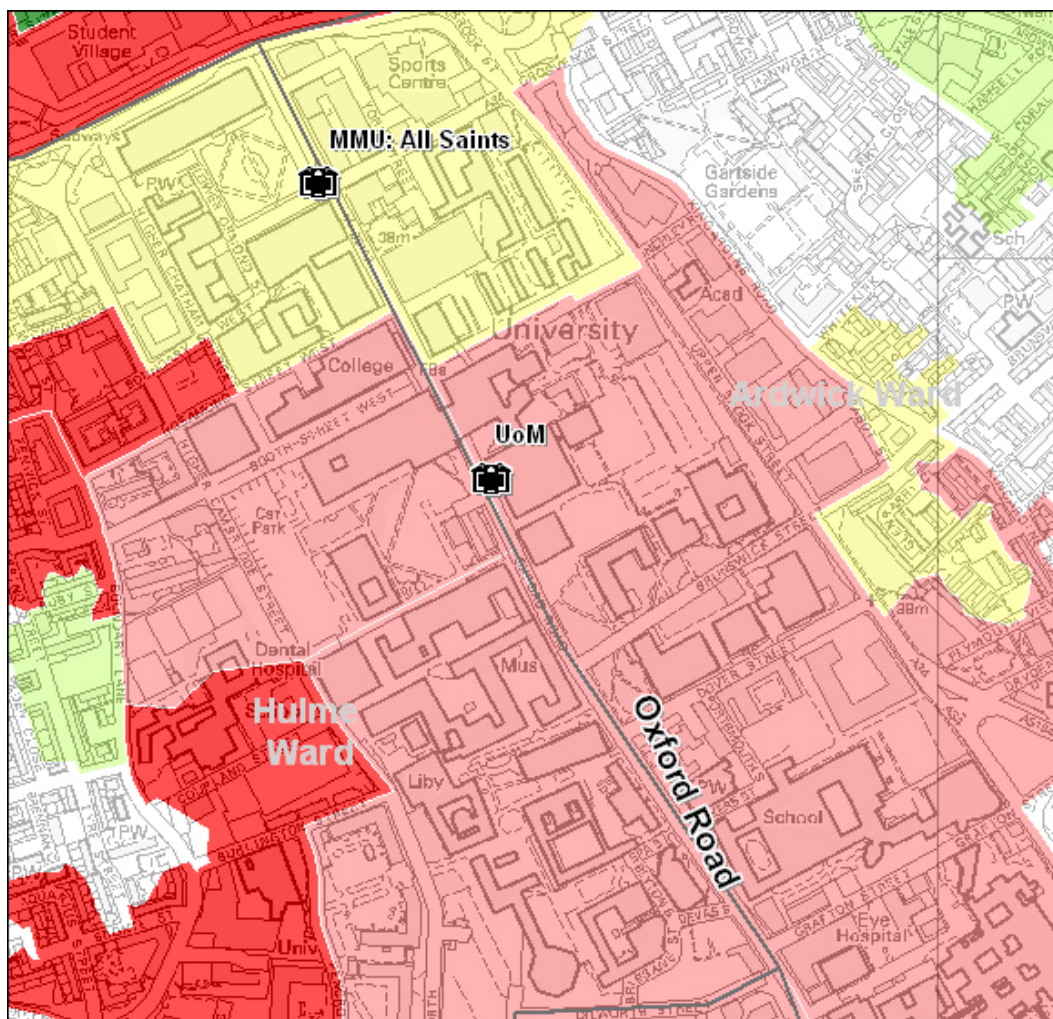
Figure 3 - Student households in City Centre



- 2.4.1 The above plan shows a concentration of student households at the southern end of the City Centre, just to the north of the Mancunian Way. This relates to the generally purpose-built accommodation around the Sackville Campus and the Student Village and adjacent development around MMU's All Saints Campus.
- 2.4.2 In the bulk of the rest of City Centre student households generally account for either <10% (west Deansgate, Castlefield) or 10-20% (Oxford Street, Deansgate, Piccadilly and Northern Quarter) of all households.
- 2.4.3 It would seem though that students have always made up a significant proportion of the City Centre population, as according to the 2001 census students made up 42% of the working age population in the City Centre, when the area had significantly less residential accommodation.

2.5 Main Universities' Campus Area

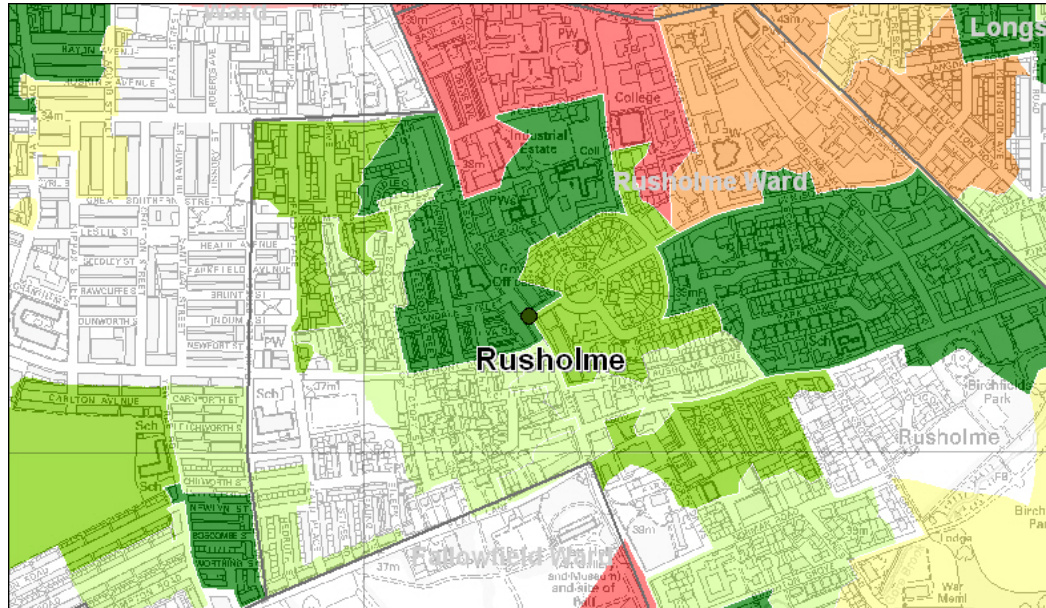
Figure 4 - Student households in Main Universities' Campus Area



- 2.5.1 The above plan shows a focussed linear concentration along the Oxford Road corridor.
- 2.5.2 There has been limited student household penetration of adjacent neighbourhoods to the east in particular, with the significant area of social housing to east of Upper Brook Street restricting the opportunities for students to live in this area.
- 2.5.3 There are greater levels of student households to the west in the relatively new purpose-built halls and general private housing of Hulme. However levels are still limited in some other parts of Hulme and Moss Side to the south west, where there is a dominance of concentrations of social housing and older private housing (which may be less attractive or accessible to student households).

2.6 Rusholme / Victoria Park

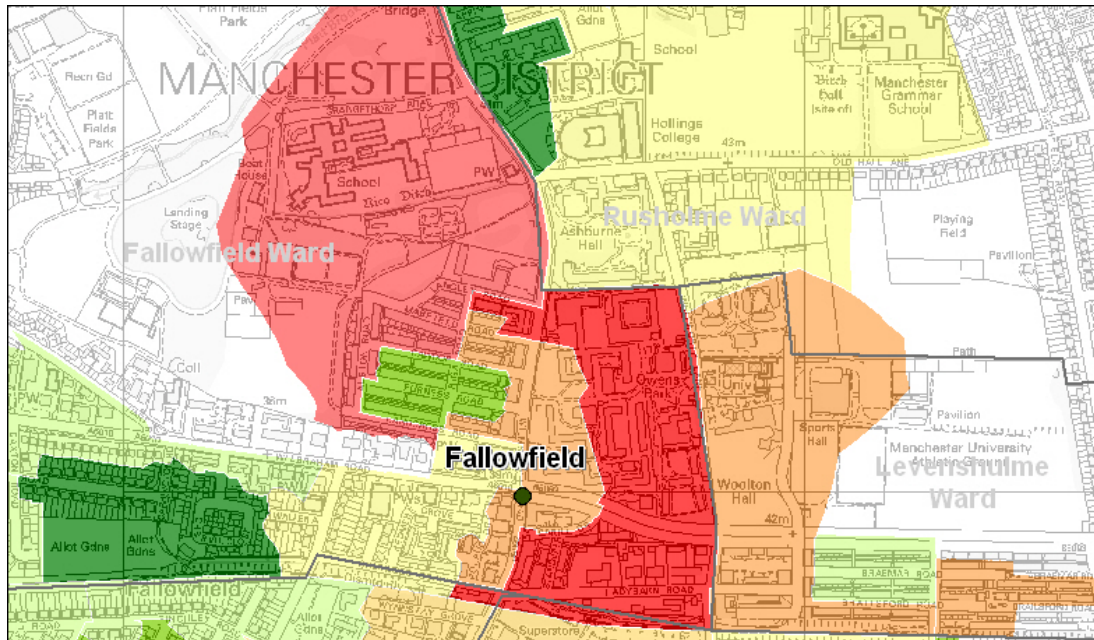
Figure 5 - Student households in Rusholme / Victoria Park



- 2.6.1 The plan above indicates a major concentration of student households to the north which will be accounted for by Opal's 600 bed space purpose-built Wilmslow Park. Apart from that, there is less of a concentration along the Wilmslow Road than may have been expected of the Rusholme/Victoria Park area (given its proximity to the main universities' campus and the Wilmslow Road). Concentrations are actually greater to the east of Wilmslow Road in the Victoria Park area where the older university halls, new purpose-built halls and the areas of larger housing are located, rather than to the west in the more compact terraced streets of Rusholme and Moss Side.

2.7 Fallowfield

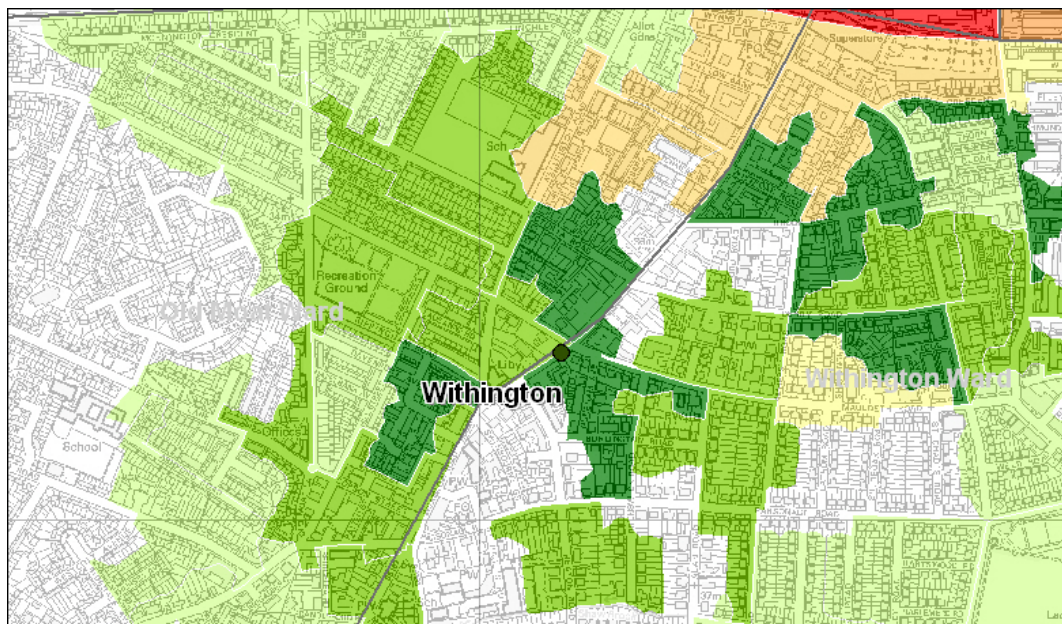
Figure 6 - Student households in Fallowfield



- 2.7.1 The plan above indicates a focus of student households along Wilmslow Road and around the district centre.
- 2.7.2 The area includes MMU's Hollings Campus. It also includes the older university halls of Owens Park and Oak House and some of the more recent new build student accommodation blocks.
- 2.7.3 The map demonstrates that concentration levels of students are lower as you move south along Wilmslow Road, and particularly as you move away from the Wilmslow Road. Being walking distance from the Wilmslow Road is obviously a key factor for student households in the area.

2.8 Withington

Figure 7 - Student households in Withington



2.8.1 The concentrations of student households in Withington (including the adjacent Old Moat Estate) are not as high as those in neighbouring Fallowfield. Again concentrations drop off and get patchier as you move south and also as you move away from the Wilmslow Road. The house types tend to get larger than in Fallowfield with more traditional semi-detached homes and many larger Victoria/Edwardian villas.

2.8.2 Whilst most of the area between the Old Moat estate to the west and the railway line to the east is at least 10% student households there are some areas with less than 10% but also some with between 20-30% and 30-40%. The highest concentrations (to 50-60%) are at the northern edge of the neighbourhood along the Wilmslow Road, where it adjoins Fallowfield.

2.9 The type of students that live in these areas

2.9.1 As part of the study we undertook a survey of 3,677 University of Manchester and MMU students (80% of the respondents were studying at the University of Manchester). Analysis of the survey responses is included at Appendix A. From the findings of that survey we can draw a number of broad conclusions about the type of students that live in certain locations:

- Younger students and those starting their studies tend to concentrate in the areas which are established student locations that already have high concentrations of student households, significant numbers of halls and are close to the universities – in areas such as the City Centre, the Main University Area, Victoria Park and Fallowfield.
- Withington whilst sharing a similar profile with the above areas in terms having a higher proportion of single students, attracts a relatively higher proportion of its students from slightly older age groups and more advanced in their studies.

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- A significant proportion of those attracted to the Main University Area are post graduate and/or international students, whereas areas like Fallowfield and Withington are dominated by British undergraduate students (Appendix A – Manchester Student Accommodation Survey 2008, Tribal). Discussions with the universities also indicate a preference from international students to be close to their places of study.
- Those students who are married, living with a partner and/or with children, form a more significant part of the student population in those slightly more peripheral neighbourhoods, outside the core of student household concentrations. These include areas such as Hulme, Longsight, Levenshulme, Chorlton, Moss Side, West Didsbury and Whalley Range.

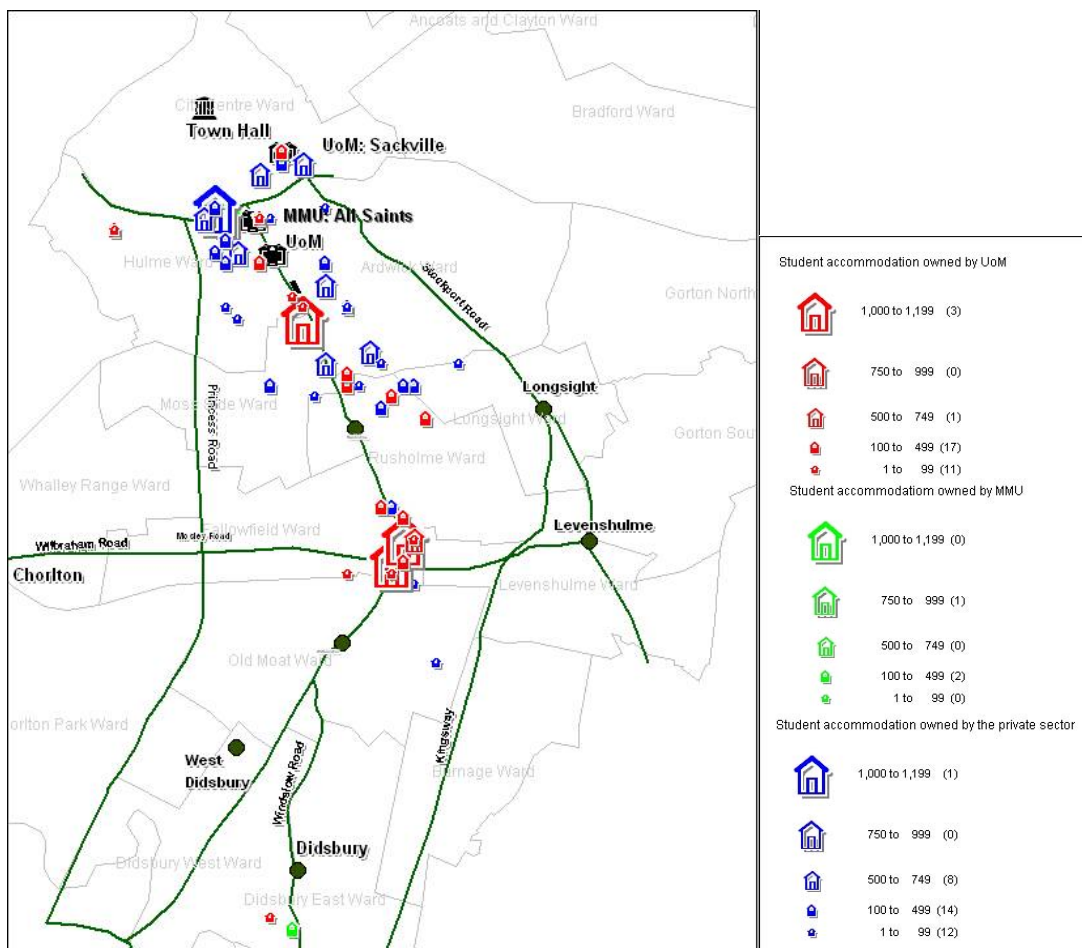
2.10 Type of accommodation that students live in

- 2.10.1 The private rented sector accounts for a significant proportion of student housing – according to the Manchester Housing Needs Assessment (HNA) of 2007, 86.6% of students live in private rented sector. However student households account for a relatively small proportion of the City's private rented sector households – just 16.5% of all households in this sector, according to the HNA.
- 2.10.2 The private rented sector student accommodation breaks down into halls of residence (including university owned halls and purpose-built private student accommodation) and general private rented accommodation (houses and flats). In the UK 23% of all higher education students live in university or private purpose-built halls (Unipol/NUS survey 2006/7). For the Manchester-based students of the two Manchester universities this figure is roughly 28%.
- 2.10.3 The last 10 years has seen significant growth in the number of private halls in the City. Privately-owned halls now account for the majority of halls bed spaces in the City.

Ownership	Bed Spaces	Percentage
University of Manchester	7,291	40%
MMU	1,113	6%
Private	9,699	54%
Total	18,103	100%

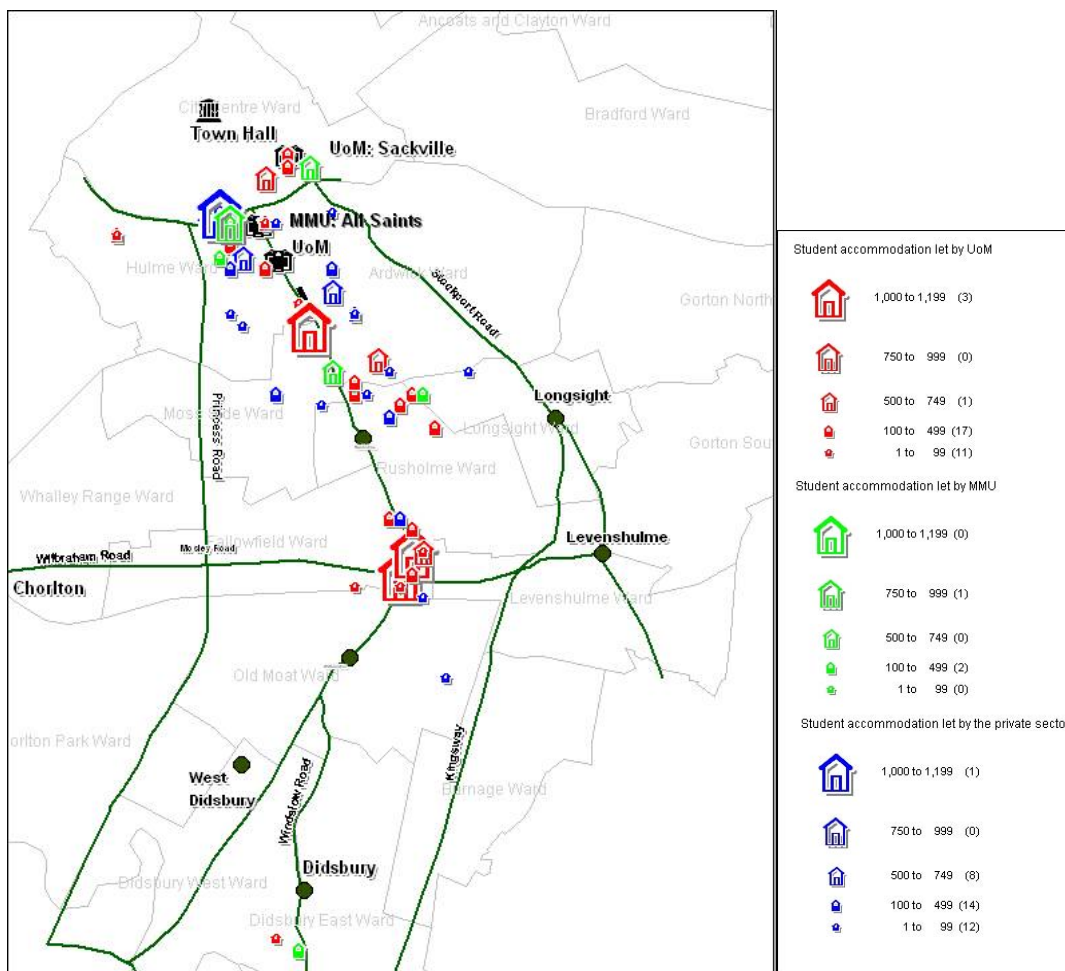
- 2.10.4 New build halls are usually for 4-6 people sharing with some studios.
- 2.10.5 The development of new private halls has focussed on main university campus area, the southern part of the City Centre and the lower end of the Wilmslow Road, nearest the universities. The following plan shows how those private halls are concentrated just to the south of the City Centre along the Oxford Road corridor.

Figure 8 – Hall locations by ownership



- 2.10.6** As well as the development of new private halls the balance has also been affected by the sale of some university-owned halls. These have tended to be the halls in more peripheral locations (e.g. Hardy Farm in Chorlton and Greystoke and Needham Halls in Didsbury) and they have generally been sold for redevelopment for general housing and flats for sale.
- 2.10.7** Keeping at least a certain level of halls accommodation is important to the universities, as guarantees of accommodation (for 1st year students in particular) are important to attracting students to come and study. University of Manchester offers a guarantee of accommodation for all 1st year students and MMU offers one for all applicants before end August (priority is given to students with special needs and those whose homes are furthest from Manchester).
- 2.10.8** As student numbers have increased in recent years and the number of university-owned bed spaces has fallen slightly, the universities have increasingly looked to lease some bed spaces in private halls from private operators. The following plan shows how a number of the privately owned halls (identified in the previous plan) are let by the universities.

Figure 9 – Hall location by letting



- 2.10.9** Any future growth is likely to be accommodated by further leasing of private halls by the universities, rather than them developing their own new halls.
- 2.10.10** The student halls market has moved towards self-catered (lower maintenance) and en-suite accommodation. The increase in private halls has seen a raising of standards in student halls accommodation with most of these private halls including ensuite bathroom facilities. University accommodation providers feel that en-suite has become more important as the gender mix has changed (now the UoM is c. 60% female), giving rise to a greater desire for security and privacy.
- 2.10.11** In general, according to purpose-built student accommodation providers, a much higher standard of accommodation is now required by students – equivalent they feel to 3* hotel standard. This includes being ensuite, maintained and cleaned. In their view students are also after a central location with limited travel which is close to the students union.
- 2.10.12** On the negative side, new private sector halls tend to not have as much social space, and this is seen by many as a drawback. There is also anecdotal evidence that the increase in new purpose built private halls in certain areas has led to increased voids in private rented properties.

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- 2.10.13** In terms of the general private rented sector, this remains the sector of choice for most students – particularly after their first year – where the wish to live out in the community with their friends is a motivating factor. A greater feeling of independence than they experience in the more institutional set-up of halls, is also a motivating factor. If we go by the figures in the HNA and assume that 86.6% of students live in private rented sector, this means that when you take out the 28% that live in halls, there are over 58% of students living in general rented accommodation.
- 2.10.14** Among those that live in general rented accommodation there is a preference for larger properties which provide the opportunity to share with a number of friends. Four and five bedroom properties dominate the private rented houses let through Manchester Student Homes (MSH), and the HNA suggested that 44.9% of student households contain four or more people (compared with 17.6% of non-student households).
- 2.10.15** In terms of the specific types of property that students tend to live in the majority of non-hall private rented properties registered with MSH are terraces. The Fallowfield, Withington and Victoria Park student non-hall rental markets tend to be dominated by houses, whereas in the City Centre it is dominated by flats.
- 2.10.16** There is evidence that an increasing number of students are choosing to stay living at home with their parents. MMU has traditionally attracted more students from the Greater Manchester area and as a result a higher proportion of their students live 'at home'. According to MMU, their data suggests this proportion has been increasing in recent years.

2.11 Rental levels

- 2.11.1** Price is an important factor in influencing students' choice of accommodation – 38% of all our survey respondents ranked price as a 'very important' factor in their accommodation choices.
- 2.11.2** According to the Student Review of Manchester, undertaken by accommodationforstudents.com in April 2008, the average weekly room rental by area in the neighbourhoods with student concentrations is as follows:
- Longsight - £43
 - Chorlton - £47
 - Levenshulme - £48
 - Rusholme - £52
 - Victoria Park - £59
 - Fallowfield - £59.5
 - West Didsbury - £63
 - City Centre - £89 (low sample)
- 2.11.3** While rents in the City Centre are the highest, this is partly a result of this market being made up of smaller (mainly 1 and 2 bed properties) and newer properties, but it is also (due to increased supply) increasingly becoming relatively more affordable.
- 2.11.4** In terms of patterns by area, noticeably our survey indicated that in Withington, more than twice as many as the average respondents across all the areas paid £60-£70 a week.

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Other significant differences are found in Moss Side and Rusholme, where significantly larger proportions of respondents paid lower rents of £50-£60. Respondents in Victoria Park paid the highest rents with 52% paying £90+.

2.11.5 In terms of halls of residence, UoM owned or leased halls try to keep rents at or below market levels. These rents tend to include bills. MMU owned halls are on average around £78, rising to around £85 for ensuite. Private halls are c. £87-91 ensuite.

2.11.6 It is worth noting that the level of rents paid by students to live in (often new) City Centre apartments are roughly the same as those paid for private student halls. The City Centre apartment would usually have larger living space and be shared between fewer people.

2.11.7 Our survey indicates that £60-£70 is the most common weekly rental paid. Unsurprisingly married respondents generally paid more with 46% paying over £100 for accommodation compared to just 6% of single respondents. When comparing the type of student and the amount paid for rent, the most common rental levels paid by student type are:

- Full time undergraduate – £60-£70
- Exchange/visiting students – £70-80
- Full time postgraduate – £90-£100

2.11.8 British students appear to pay less for accommodation on the whole, compared to International and other EU students.

2.12 Drivers behind student choice

2.12.1 According to our survey 'Safety and security' ranked as the most important factor influencing students' choice of accommodation. It is a particularly important issue for female, international visiting and post-graduate students.

2.12.2 The most important factors identified by our survey were:

- 'Safety and security'
- 'Price' – particularly important for full time postgraduates
- 'Living with friends' – this is far more important to full time undergraduates than it is to exchange/visiting students or full time postgraduates
- 'Local shops, services and other facilities' – this was an important issue across the board for most types of students
- 'Being near friends' – this factor is more important to full time undergraduates

2.12.3 A survey by student accommodation providers UNITE identified a Top 10 of drivers for student accommodation choice. In order of importance, these were identified as:

- Own internet access
- Nearby supermarket and shops
- Good lighting and windows
- Within easy reach of university

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- Being able to do what I want where I live
- Feeling I would be really secure
- Security
- Peace and quiet for studying
- Close to bus routes
- Being able to have friends around when I want

2.13 Strategy and policy context

MCC strategies

2.13.1 In developing a strategy for student accommodation in Manchester, it is important to set that within the context of other relevant existing strategies. Key Manchester City Council strategies include

- The South & Central Manchester Strategic Regeneration Frameworks (SRFs)
- Manchester's Community Strategy
- City South Strategic Development Plan
- Manchester City Centre Strategic Plan
- Manchester Salford Pathfinder

2.13.2 A review of the South Manchester SRF identifies key objectives including:

- Retention and attraction of families – through housing related actions
- Attracting and retaining talent
- Developing cohesive and integrated communities
- Maximising the contribution of students
- Addressing neighbourhood management issues, anti-social behaviour and crime

2.13.3 Key objectives within the Central Manchester SRF include:

- Physical improvements to improve connection and create quality neighbourhoods to attract and retain *economically active residents*
- Developing the knowledge corridor around expansion of the universities.

2.13.4 The Community Strategy sets a number of strategic goals, the most relevant of which include:

- Competing in the global economy;
- Housing and Sustainable Communities;
- Enhancing the cultural base.

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2.13.5 The recently completed City South SDF identifies the significant educational, cultural, health and economic assets of the area around the universities - 37,000 people (12% of City Centre workforce) work there. Key objectives of the SDF include:

- Improving linkages and integration with surrounding communities
- Identifying key sites to enable growth
- Ensuring an appropriate balance between the development of new residential and employment space
- Raising educational attainment levels
- Growing and improving the retail and leisure offer
- Developing the area as the heart of cultural Manchester

2.13.6 The Manchester City Centre Strategic Plan produced in partnership with Cityco, sets out a vision for the development of the city centre over the next three years, describing the challenges and key priorities for each locality

2.13.7 Large numbers of the City's student population live within the Housing Market Renewal Pathfinder area. Significant research has been undertaken by the Housing Market Renewal Pathfinder. Research conclusions of relevance to this study includes its suggestions regarding the sequencing of new build family houses after the development of flats and smaller units, as well as its conclusion that younger people are more open-minded regarding untested markets (Insights into Transforming the Inner Area Housing Markets of the Manchester City Region – 2007).

Other key policies and strategies

2.13.8 The Government is currently undertaking a review of HMOs¹ to understand how planning system can more effectively manage HMOs. Also the Council's Local Development Framework is currently in preparation. The timing of both of these pieces of work provide an opportunity for this study to influence policy, by either assisting lobbying or directly helping to shape policies.

2.13.9 The Council's Unitary Development Plan is the current development plan for Manchester and, until it is replaced by the Local Development Framework Core Strategy, sets out the policies against which planning decisions are made in the City. Policy H1.3 states that the Council wishes to see further student accommodation provided, including some specifically designed for disabled students, on sites which are well related to Higher Education establishments. The Council will particularly welcome further student housing which is easily accessible from the Higher Education Precinct.

2.14 Market context

2.14.1 The student housing market operates within the context of the City's wider housing market. Research by the HMR Pathfinder and the Association of Greater Manchester Authorities (AGMA) – Making Housing Counts and the Strategic Housing Market

¹ The Housing Act 2004 defines a HMO as an entire house, flat or converted building which is let to three or more tenants who form two or more households, who share facilities such as a kitchen, bathroom or toilet. At present, privately rented shared houses let to students which only comprise one household would not be classified as HMOs.

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Assessment – identifies four housing markets across Greater Manchester. These are Central, North-West, North-East and Southern. Central is predominantly the pathfinder area, and is the location in which most of the student accommodation is situated.

- 2.14.2 Housing in Manchester has gone through a period of unprecedented and very rapid change. Driven by continuous strong economic growth, and associated increases in population, the housing landscape has quickly gone from being dominated by severe and divisive problems caused by low demand to very different market conditions.
- 2.14.3 Housing market changes have had some notable impacts on the student housing market. For example, there has been substantial expansion of City Centre housing market in recent years with increased supply and falling rental levels opening up this market to students. Redevelopment of Hulme has provided the opportunity for purpose-built student accommodation to spread west from the main university precinct. Also the increase in the availability of buy-to-let mortgages and the increased number of landlords has led to increased supply and choice for students in the rental market.
- 2.14.4 Anecdotal evidence over the last few months shows a strengthening of the rental market given the difficulties in obtaining mortgages due to the current economic conditions.
- 2.14.5 These general changes in the housing market have combined with significant growth in student numbers in recent years to result in increasing numbers of 'student-lets' in certain parts of the City already popular with students. This has led to encroachment and expansion into some adjoining areas. However, anecdotally (from conversations with letting agents), we understand there has also been 'de-studentification' of some areas such as Longsight and Levenshulme. Some of this is likely to have been driven by these market changes together with the increased development of purpose-built student accommodation, which has led to an increase in supply in other areas, which are more attractive to students and nearer the core areas. Whilst there has been a significant amount of research done on 'studentification', there does not seem to have been much (or possibly any) done on the affects of 'de-studentification'. In the absence of this research it is difficult to define the impact, although agents point to a drop off in demand for lettings.
- 2.14.6 De-studentification can also be driven by different market forces (generated to a significant extent by young professionals and young families), with 'gentrification' and rising values pushing students out of the area.

3 Forecast situation

3.1 Introduction

- 3.1.1 This section of the report sets out information that the Consultants have been able to draw together with regard to potential or forecast future changes that will impact upon student accommodation needs and demands in Manchester.

3.2 Student numbers

- 3.2.1 Whilst student numbers are forecast to grow in the future, they are not expected to grow at the rates they have been growing in recent years.
- 3.2.2 Universities UK forecast that overall student numbers in the UK will grow by 2.1% from 2006 to 2027. In terms of the type of student growth that is forecast they predict that growth will be more significant in part-time undergraduates (forecast to grow by 28,000 – 4.7%) compared to full-time undergraduates (forecast growth of 10,000 – 0.8%). International student numbers from are forecast to grow by 7,700 (4%) compared to Home and EU student growth of 41,100 (1.9%).
- 3.2.3 University of Manchester and MMU both foresee future growth, but see it as relatively limited relative to that experienced recently. The University of Manchester for example estimate potential growth by up to 2,500 students over the next 5 years – about 7% growth. MMU estimate growth of around 290 students over the next 5 years – about 1% growth. Both universities see their growth as being mainly in international students.
- 3.2.4 The level of overall growth in Manchester is likely to be well below the rates of last 10/15 years, when according to Manchester Key Facts 2005, Manchester's student population (all students – not just MMU and University of Manchester) grew by 26% from 70,000 in 1995 to 88,000 in 2005.
- 3.2.5 The exact level of future growth will depend upon a number of factors including competition for students from other cities and countries and the future of the Government cap on funding.

3.3 University campus changes

- 3.3.1 There is a £300m plan to consolidate MMU academic activity. Hollings, Elizabeth Gaskell and Aytoun teaching facilities were originally proposed to be consolidated into the All Saints and Didsbury facilities. However, the current plan being consulted upon is that Hollings, Elizabeth Gaskell and Aytoun will be consolidated into the All Saints and the Didsbury campus will also close and a new campus will be created in Hulme.
- 3.3.2 The proposed new campus in Hulme would accommodate the teaching facilities and students currently using the Didsbury and Elizabeth Gaskell campuses. This will involve the movement of around 5,000 students studying mainly education, health and social services. The former Hollings and Aytoun courses would then be provided from the All Saints campus. MMU are currently developing a masterplan for the Hulme site which is proposed to be at the Northern end of Birley Fields.
- 3.3.3 If the plan for consolidation and a new campus in Hulme goes ahead, this will have implications for future patterns of student accommodation in the City. It is likely to lead to further focus of student numbers towards City Centre, with a reduction in some of the more peripheral areas, as well as increasing student accommodation in and around Hulme itself (the new MMU campus could include an element of purpose-built student accommodation).

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- 3.3.4 UoM have a comprehensive £650m redevelopment programme. This programme is focussed on the improvement of facilities and the environment, rather than any major shifts in location. It is therefore in itself unlikely to have a major impact on the pattern of student accommodation, although the improvements will add to the attractiveness of the locality of the Main Campus as a place to live in and around. UoM have indicated a desire to develop further purpose-built student accommodation on its Sackville Street site and Fallowfield campus.

3.4 Housing market

- 3.4.1 Manchester's recent growth has been forecast to continue in population and households – particularly in the centre of the conurbation. This could result in 45,000 additional households in Manchester and Salford by 2016. Manchester's population is forecast to exceed historical levels, with predicted growth of 17.8% by 2021, compared to 5.2% in Greater Manchester and 4.2% in North West.
- 3.4.2 This concentration of growth within the core of the conurbation will mean a continuing and developing role for areas around the urban core, in providing the supply and mix of housing to meet the growing demand and need. These areas will have a key role play in attracting and capturing incoming households as well as in retaining households within the City – including helping to reduce the loss of higher income households from the conurbation core.
- 3.4.3 A significant amount of the forecast growth will be in the young skilled population attracted to work in the knowledge economy. Research by the Housing Market Renewal Pathfinder has identified a 'Cosmopolitan Spine' running north-south through the City's housing market. It is felt that the 'Cosmopolitan Spine' will be a key market in attracting this population to the City. Students are concentrated in the southern part of that area.
- 3.4.4 The private rented market will also be important to this growing population. According to research by Deloitte as part of the Manchester Strategic Housing Market Assessment, produced for Manchester City Council, the private rented sector has grown substantially in Manchester over recent years to become the housing of choice for the 16-34 age group.

3.5 Regeneration

- 3.5.1 Regeneration across the City will continue. In certain areas continuing to undergo significant regeneration, particularly those close to the universities such as Hulme and the City Centre, it is likely that students will continue to play a key role in this.
- 3.5.2 There are other significant regeneration initiatives located to the east of the main university campuses.

3.6 Population and demographic changes

- 3.6.1 The City's population is forecast to grow further, with growth of 11% predicted from 2005-2015. The highest growth rate is expected in the 25-29 age group (29%), closely followed by the 30-34 age group (28%).

3.7 New provision

- 3.7.1 The market context as described, along with initial high level modelling of potential demand undertaken as part of this strategy both suggest that there is the potential to accommodate additional purpose built student accommodation in the City over the next 5 years. The appropriate level of this development will be dependent upon a range of interrelated market factors such as changes in supply in the general rented market as well as the direction of the wider economy and housing market in the City. Initial high level modelling suggests in the order of a 10% - 20% increase in hall bed spaces (between



1,810 – 3,620 additional spaces) could be accommodated within the City, but this needs to be the subject of more detailed analysis. Manchester City Council has been provided separately with the assumptions that sit behind this analysis.

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4 Opportunities and Challenges

4.1 Economic impact of students

- 4.1.1 Whilst students benefit the city as a whole, it has been noted that the negative impact of student populations are disproportionately felt in a limited number of key neighbourhoods.
- 4.1.2 There are a range of potential economic benefits associated with growing numbers of students. Of critical importance to Manchester in its aspirations to develop its knowledge economy is the existence of a skilled graduate workforce to support that development. Manchester has the opportunity to retain a highly skilled workforce through the retention of graduates which will help strengthen the modern, high skill economy.
- 4.1.3 Most of the core areas of student accommodation are directly adjacent to areas of significant multiple deprivation. Student accommodation can support regeneration through supporting businesses and services, creating housing demand and adding to the culture and vibrancy of an area
- 4.1.4 However students do also present a number of economic challenges. Amongst those challenges can be an increase in house prices driven by private rented sector, and this issue is considered in more detail below.
- 4.1.5 However students also have significant economic benefits before they graduate. Their purchasing power is considerable and can provide significant boost to the local economy.
- 4.1.6 With an estimated term-time spend of £11,205 pa in 2004/05 according to the DfES Student Expenditure Survey, the 64,191 Manchester-based students at MMU and Manchester University could generate expenditure of nearly £ ¾ billion (MMU's research suggested that their students spent an estimated £184m off campus in 2004/5).
- 4.1.7 Inflating this estimated term-time spend figure of £11,205 pa by 3% to £11,541 pa, to give comparable figures for 2005/6, it means that a 3 bedroom house can generate £34k total expenditure – or £46k if a downstairs room has been converted to a bedroom – in term time as a student household. Whereas if the 3 bedroom house was instead occupied by a family household of 2 adults and 2 children, based upon the average annual expenditure for this household type (Household Expenditure Survey for 2005/06) it would generate expenditure of £32k.
- 4.1.8 With regard to what that money is actually spent on, according to the DfES survey, families spend more on health, transport and entertainment while students spend more on housing, food and drink and significantly more on personal items – i.e. clothes, toiletries, mobile phones, household goods, etc.
- 4.1.9 Anecdotally, some businesses (i.e. businesses in areas where student numbers have changed and as a result they have noticed changes in spending patterns) feel there is a greater tendency for students (as opposed to other types of households) to spend locally. There is some academic research to back this up, with a 2001 report by Canterbury City Council on “The Economic Impact of Four Large Education Institutions on the Canterbury District Economy” estimating that 58% of the expenditure by students at the four HEIs benefited local businesses.
- 4.1.10 A student presence can support the viability of certain sectors of business. Significant levels of students can lead to changes in type of retail and entertainment services available. Their presence can also increase the range of goods, services and attractions.

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4.1.11 Most of the core areas of student accommodation are directly adjacent to areas of significant multiple deprivation. Student accommodation can support regeneration through supporting businesses and services and creating housing demand.

4.1.12 Also the seasonal nature of student demand can be issue with demand for goods and services dropping off dramatically during holiday periods. Limited research exists on the seasonal impact of student concentrations. Anecdotally, it is understood that Asda in Hulme make around £100k less a week when the students go away in the summer according to the store manager. However they have been able to grow and develop the store on the basis of their student custom.

4.2 Cultural benefits

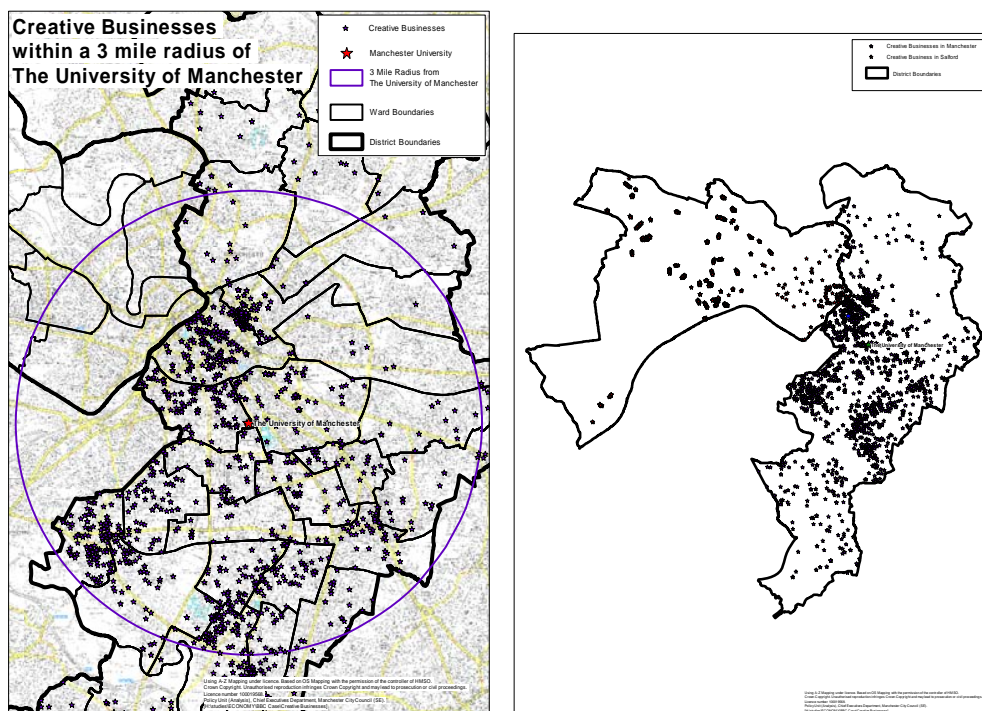
4.2.1 As discussed earlier, students tend to create a critical mass and demand for a diverse range of cultural facilities and events and there is the potential that the benefits from these can positively impact on the local neighbourhoods in which they are located. This existence of a diverse range of cultural facilities and events helps to enhance the reputation of Manchester as vibrant, dynamic location and as an attractive destination for night-clubbing, music, the arts, evening economy and tourism.

4.2.2 The presence of significant numbers of students has helped to drive changes in retail and entertainment services in some neighbourhoods, encouraging the locating of theatres, cafes, bookshops, live music venues and comedy clubs.

4.2.3 In 2007 Manchester was judged to be the UK's most creative city according to the BOHO Britain Creativity Index. This is helped by abundance of graduate skills – 650 new media sector graduates every year.

4.2.4 Oxford Road Corridor around the main university campuses has been identified as a key creative industry corridor within the City, and the plans below illustrate the clustering of creative businesses around the universities and the areas with concentrations of student households.

Figure 10 – Locations of creative businesses



4.3 Graduates settling

4.3.1 According to MMU, 68% of their graduates stay and work in the North West, underpinning and growing the region's economy.

4.3.2 The student survey identified that of 52% of respondents felt they were either 'likely' or 'very likely' to remain in Manchester after graduation. Of those students, their areas of preference to live in following graduation were those in and around the areas of student concentration. By far the most popular choice was the City Centre, followed by Didsbury, Withington, West Didsbury and Fallowfield.

4.4 Attract young professionals & graduates

4.4.1 As the information above from our survey suggests, there is a strong attraction for students, once they graduate to stay in the wider area around and close to those neighbourhoods of student concentration. The neighbourhoods with student concentrations, and those immediately surrounding them, act as a significant attraction to young professionals and graduates coming to live in Manchester.

4.4.2 Data and mapping from Experian supports this with high concentrations of 'Educated, young, single people living in areas of transient populations' identified along the City's Wilmslow Road corridor.

Figure 11 – Manchester Mosaic Groups 2007

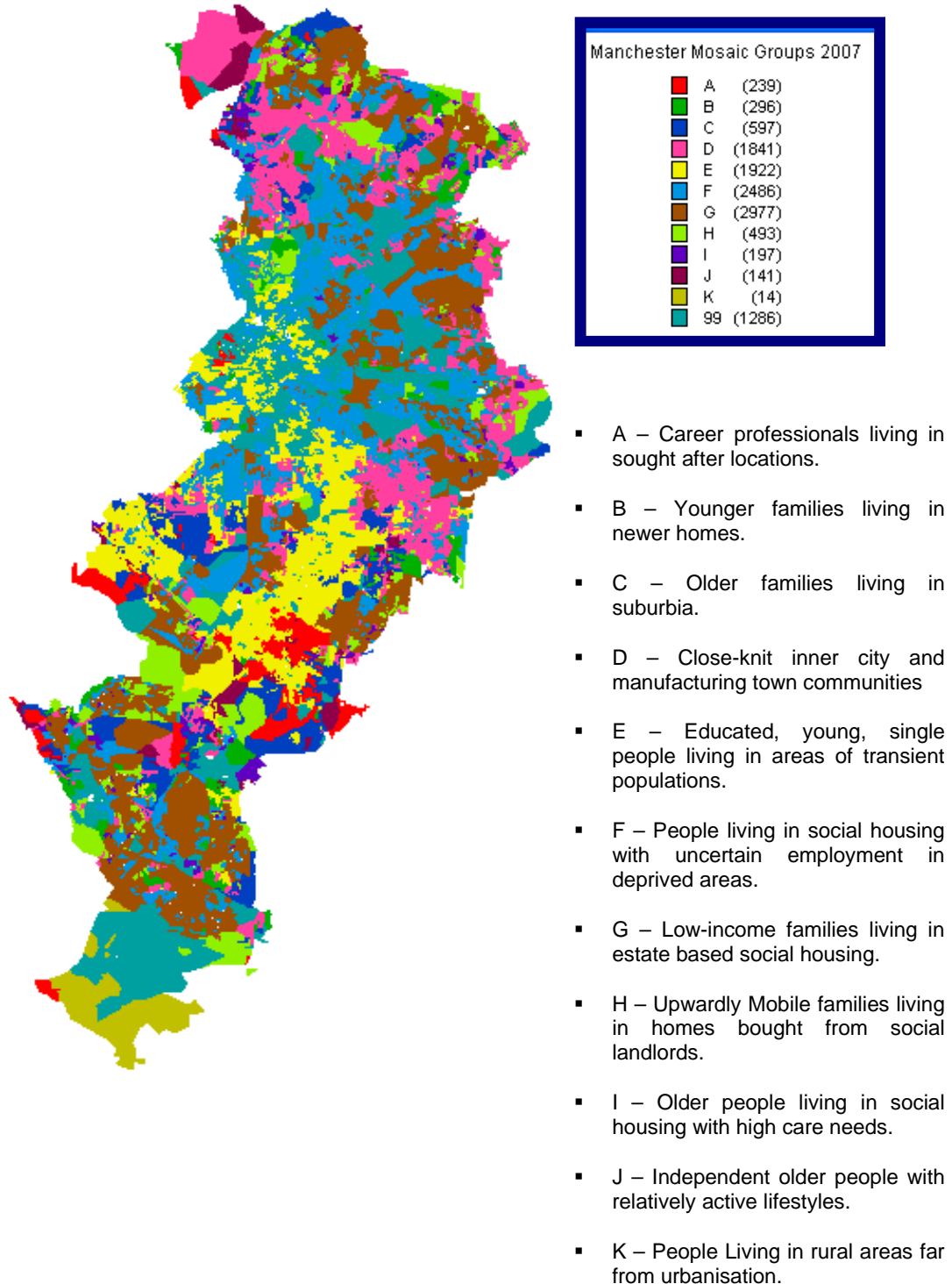
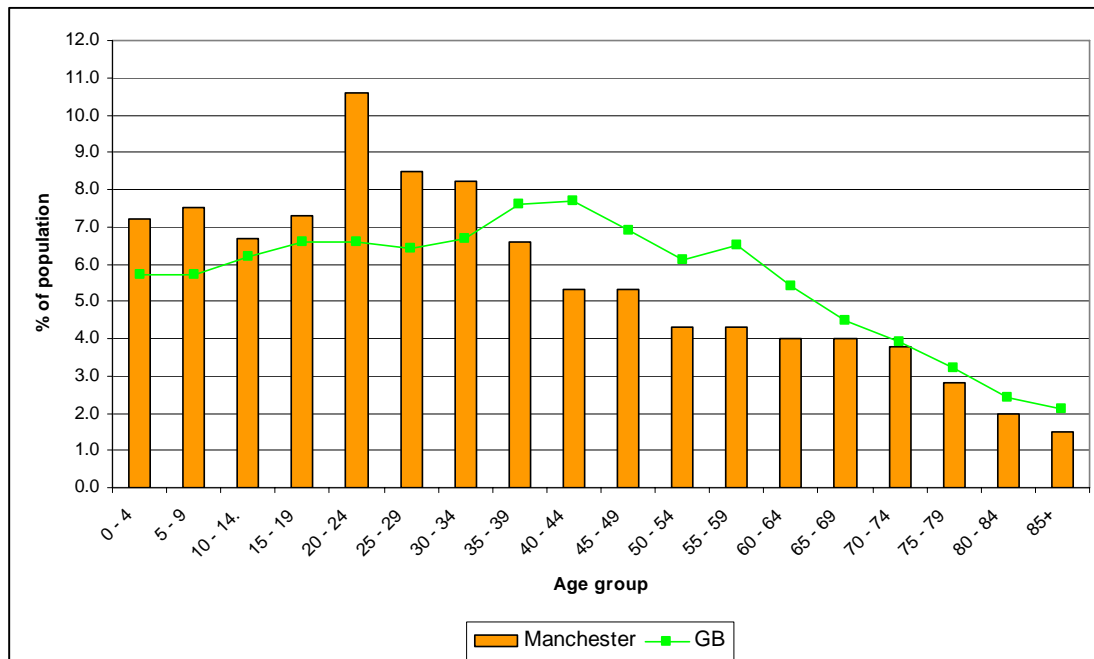


Figure 12 – Population by age



4.4.3 As the above chart (based upon the 2006 mid-year population estimates) illustrates, there is a high proportion of young people in the City with the 20-29 age group accounting for 19% of Manchester's population. The greatest growth in Manchester's population in recent years has been in 25-29 and 20-24 age groups. Wards with highest proportions of 20-24 year olds are those with substantial concentrations of students:

- Withington
- Fallowfield
- Old Moat
- Ardwick
- Rusholme

4.4.4 Wards with highest proportions of 25-29 year olds are in and around those areas with substantial student concentrations:

- Didsbury West
- Ardwick
- Moss Side
- Hulme
- Rusholme

4.4.5 Therefore the high levels of younger people in certain parts of the City and the projected future growth of those age groups, means that the demand for private rented accommodation in the those parts of the City from the population as a whole is likely to increase.

4.5 Improved public transport

4.5.1 The Manchester Student Travel Survey found that 48% of students surveyed use the bus. In our own survey 38% of student identified buses as their main method of transport. This rose to 67% for those respondents living in Fallowfield.

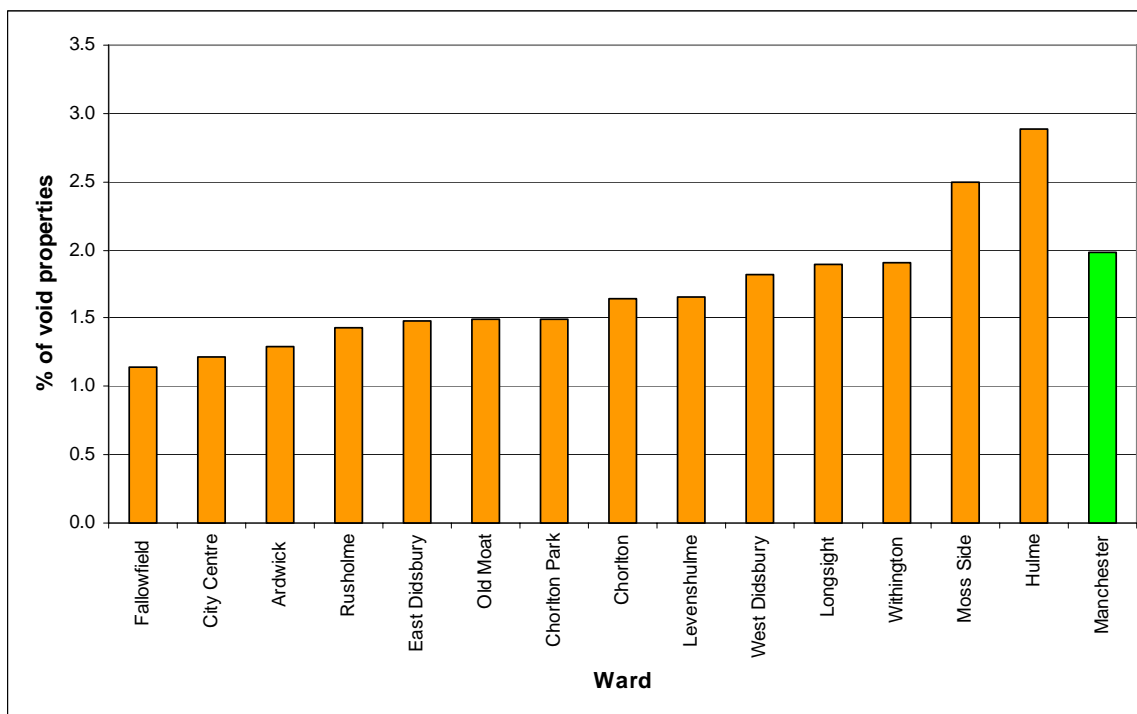
4.5.2 A critical mass of students can help to improve public transport links. In Manchester this has led to the Oxford Road / Wilmslow Road corridor – one of Manchester's key commuter roads – becoming officially the busiest bus route in Europe, with more than 100 buses an hour.

4.5.3 Buses on routes in the City, where significant numbers of students live, operate virtually 24 hours a day. The operators on these routes offer relatively low fares for students and general public. The presence of significant numbers of students using bus services has also led to improvements in the associated infrastructure – e.g new bus terminal at Owen's Park and bus gates at Rusholme.

4.6 Generate demand for housing

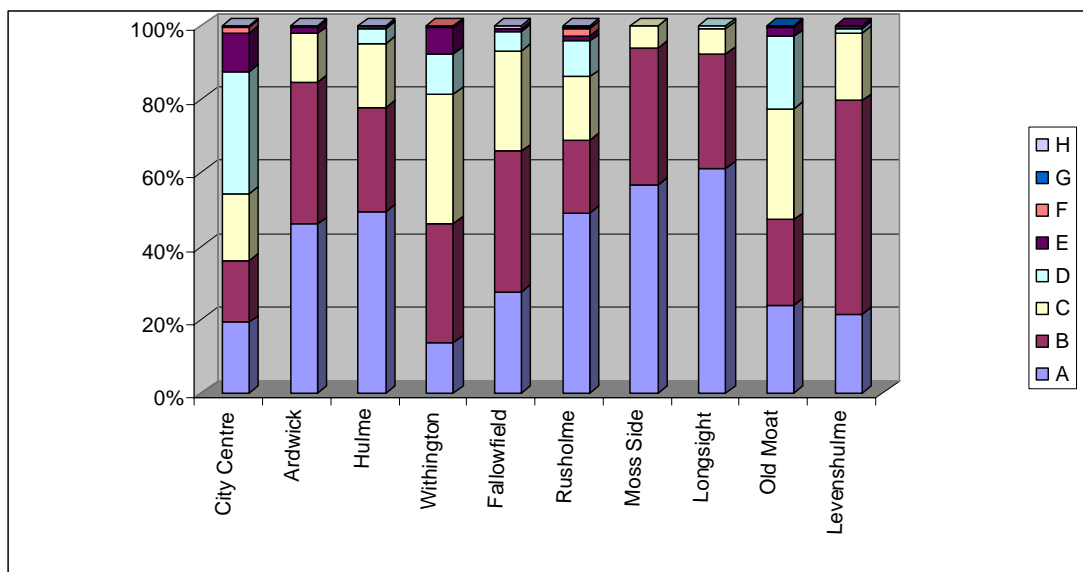
4.6.1 As illustrated below, the level of vacant properties is generally below average in the areas of student concentration.

Figure 13 – Level of vacant properties in Wards in and around areas of student concentration (MCC Council Tax Data 2008)



- 4.6.2 The student housing market is quite a broad market, in that they generate demand for a range of house types and values. This is illustrated by the chart below, which shows the Council tax band of student exempt properties by Ward, the value of the type of housing occupied by students varies by area.

Figure 14 – Mix of council tax bandings in Wards in and around areas of student concentration (MCC Council Tax Data 2008)



4.7 Pioneers

- 4.7.1 Research by the HMR Pathfinder suggests that younger people are more open-minded regarding untested markets (Insights into Transforming the Inner Area Housing Markets of the Manchester City Region – 2007). Students in Manchester have demonstrated this by contributing to the regeneration of Hulme. Students are not generally viewed as a problem by key agencies and some residents groups in Hulme and have, to an extent, integrated well. Whilst the area has a history of students living there, since the redevelopment it now houses students in greater numbers in general rented accommodation as well as purpose built halls. MMU's masterplan for Hulme assumes an additional 740 purpose-built student bedspaces.
- 4.7.2 Students have also played a major role in supporting the new development that has gone on in City Centre Manchester. This is evidenced by the number of purpose built student accommodation developments within the City Centre in recent years, as well as reports from letting agents of increased demand from students for general lets within the City Centre.
- 4.7.3 There is likely to be a further potential role for students and student accommodation to play in the development and growth of these areas (particularly through supporting varied housing products and local services) as well as other future regeneration areas. Crucially however, probably only those regeneration areas in close proximity to the universities will be attractive to students. This is likely to be the case because while some students will continue to be attracted to untested markets, experience from other regeneration schemes in Manchester suggests that they will only move into those areas if they are accessible to their places of study.

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- 4.7.4 With the likelihood of some MMU teaching facilities moving to Hulme, students will play an important role in the future development and growth of this neighbourhood.

4.8 Crime and anti-social behaviour

- 4.8.1 The attraction of criminals and crime by students is a major concern raised by residents in neighbourhoods with high levels of students.

- 4.8.2 However, where there is a concentration of students in a neighbourhood there is an increase in reports of noise and associated anti-social behaviour in relation to students having parties and returning home from a night out. This can be an ongoing source of nuisance for many residents within neighbourhoods where students live as well as those neighbourhoods where they socialise.

- 4.8.3 This results seriously upon the quality of life experienced by many other households within these neighbourhoods as well as deterring others from moving into certain areas. Discussions with residents and Council officers suggest that residents in Fallowfield and Withington in particular can be badly affected by this type of behaviour.

- 4.8.4 According to 2007 GMP data students make up 10% of all victims of BCS crime in Manchester whereas they make up 12% of the population according to Manchester Key Facts.

- 4.8.5 The most common crime experienced by 18+ students is burglary, with 16% of victims of burglary in the City being students. These figures are likely to be skewed by the fact that in one burglary of a single student house there may be multiple victims recorded for that burglary, whereas a burglary at a family property will only be recorded as a single victim.

- 4.8.6 After burglary the second and third most common crimes against students are theft from motor vehicle and criminal damage.

- 4.8.7 Hot spots for crime with 18+ student victims match with the areas where most students live and study - the city centre, university area and Fallowfield. In particular there are high levels of burglary around areas where students are concentrated, although there are also high levels in other areas with relatively low student populations (e.g. Chorlton and Wythenshawe).

- 4.8.8 Discussions with Police officers indicate that students with their often high levels of valuable consumer goods, combined with often poor personal and household security, can attract burglars and street robbers into an area, but the victims can often be non-students living in those areas.

- 4.8.9 Crime is also a big issue for students themselves, with safety and security being identified by our survey as the most important factor affecting their choices of accommodation.

4.9 Street environment

- 4.9.1 Some of the main problems identified by co-ordinators for wards with concentrations of students are those concerning the street environment. They include problems like litter, fly tipping, misuse of bins and generally the amount of waste being produced. However actual reports of problems regarding the street environment are actually relatively low in most wards with concentrations of students (Manchester City Council – Street Environment Managers 2007).

- 4.9.2 This could be because other students may be less likely to report these problems as well as because the issue for the Council and many residents is not necessarily the overall level of the problems, but more that the impact of students on the street environment is

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manifested in concentrations of these problems at certain times of the year (at the beginning and end of term times).

Figure 15 – Service tickets issued (Manchester City Council 2007)

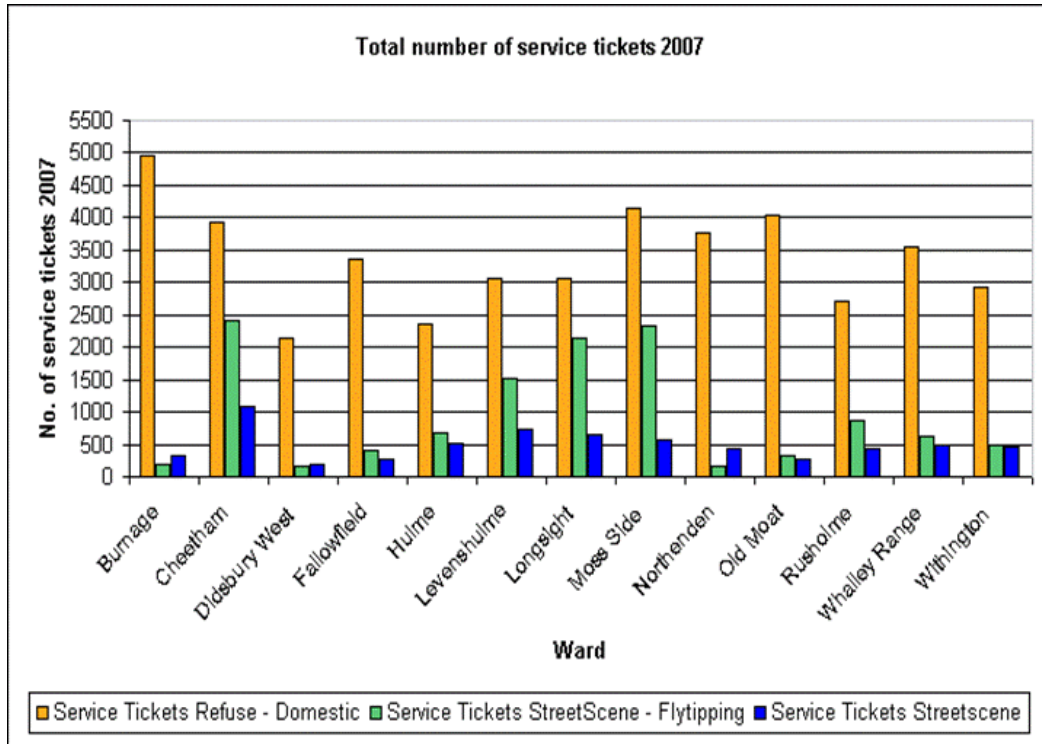
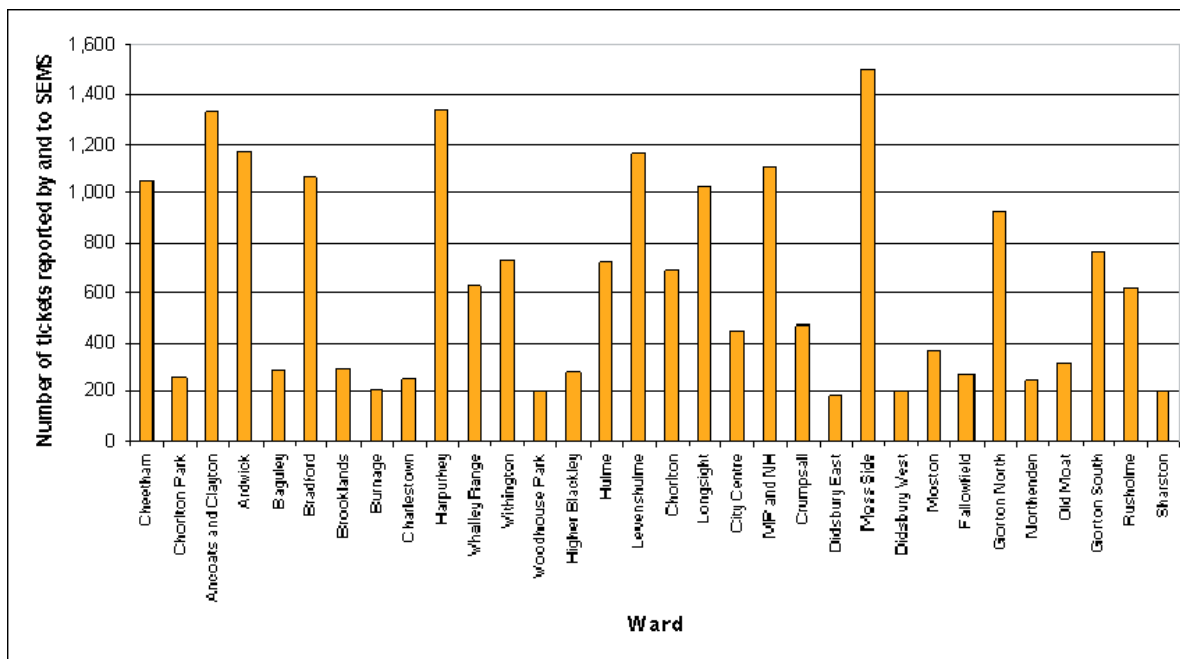


Figure 16 – Street Environmental Management tickets by Ward (Manchester 2007)



4.9.3 The generation of street environment problems by students in certain instances may be partly to do with the house type often occupied by students. For example there is a high level of students in redeveloped Hulme, but fewer problems with refuse than exists in the predominantly old terraced streets of Moss Side and Rusholme.

4.10 Property conditions

4.10.1 Another major concern identified by co-ordinators for wards with concentrations of students as well as residents who live in those wards, is landlords failing to properly maintain their properties.

4.10.2 This is to some extent borne out by the level of complaints received by the Council's Private Sector Housing Team regarding the accumulation of waste at private houses and the management of properties, which show high levels for the wards of Withington and Old Moat.

4.11 Car parking

4.11.1 Whilst levels of car use are very low amongst students – it was identified as the main form of transport by just 3% of students in our survey – car parking associated with students can be an issue for some residents. The location of these car parking issues in areas such as Hulme, Ardwick and Didsbury are however also linked to student teaching facilities. In these areas the main problems tend to be experienced during the day. This may be because whilst in Manchester students tend to use public transport but will still own a car which can lead to car parking issues in areas of high student concentration.

4.11.2 Parking has been a significant issue for some time around the main universities' campuses (where some residents parking schemes have been implemented and further

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schemes are being considered) and the Didsbury campus (where it has been an influencing factor in decisions about the future of that campus).

4.12 Impact on services

4.12.1 There has been limited research done on the impact on businesses in student areas, but with potentially more expenditure than a family in the same house and a propensity to spend more locally, the impact on local traders could be very significant.

4.12.2 High concentrations of students in particular areas can affect the balance and range of services provided in the district centres that serve those areas. Analysis of the level of takeaways and bars – uses sometimes raised as being associated with high levels of students – in district centres (based upon the Council's District Centre Shops and Facilities Review 2007) does indicate a significantly higher proportion of takeaways in Fallowfield than in other centres (from a range of different types of centres chosen for the purposes of comparison), although still a lower overall number than in Levenshulme. It also shows a higher proportion of bars in Fallowfield, though again a lower overall number than in Didsbury.

4.12.3 The analysis shows that it is difficult to generalise about the impact of high concentrations of student households on the provision of certain types of shops and services in their local district centres – even those traditionally associated with students. Relatively high numbers of takeaways can be found in some areas with high student concentrations but can also be found in other areas such as Levenshulme where other factors, such as a high number of vacant units, are influencing these levels. Likewise comparatively high levels of bars and pubs can be found in some areas of student concentration (Fallowfield) - although not all (Withington) - but can also be found in other more mixed neighbourhoods (Didsbury).

Figure 17 – Number of bars and takeaways in selected wards

District Centre	Total no. shops & facilities	No. take-aways	% take-aways	No. bars or pubs	% bars or pubs	No. vacant	% vacant
Didsbury	123	5	4%	14	11%	2	2%
Fallowfield	66	21	32%	12	18%	2	3%
Withington	108	10	9%	7	6%	8	7%
Levenshulme	259	24	9%	13	5%	28	11%
Gorton	87	6	7%	3	3%	6	7%

4.12.4 Concerns have been raised in the local papers (South Manchester Reporter) by a number of businesses in Didsbury about the potential impact that the closure of MMU's Didsbury campus may have on their businesses.

4.12.5 Students may bring an increased demand for some public services (e.g. policing), which can have cost implications, but as the preceding sections suggest, this may not be that significantly greater than in areas without concentrations of students.

4.12.6 In August 2005 Central Manchester Primary Care Trust undertook a Health Needs Assessment of Higher Education Students in Central Manchester. This found difficulties, administrative and clinical, in managing the large influx of students who choose to register, or re-register at the beginning of each academic year. Although it also found that a significant proportion of students (34%) do not actually register with a GP. This, the report suggested, can lead to a situation where they later present for treatment on an ad hoc basis or present at the local Accident & Emergency Department.

4.12.7 The transient nature of students can create problems for GP practices and make it difficult to ensure follow-up appointments are adhered to. It can also create 'ghost patients' when students leave the area without informing the practice, particularly in the case of international students. The report identified sexual health and mental health as key concerns following discussions with health care providers and university staff, with some contributors suggesting that current provision needs to be increased and improved to meet the needs of students in Manchester.

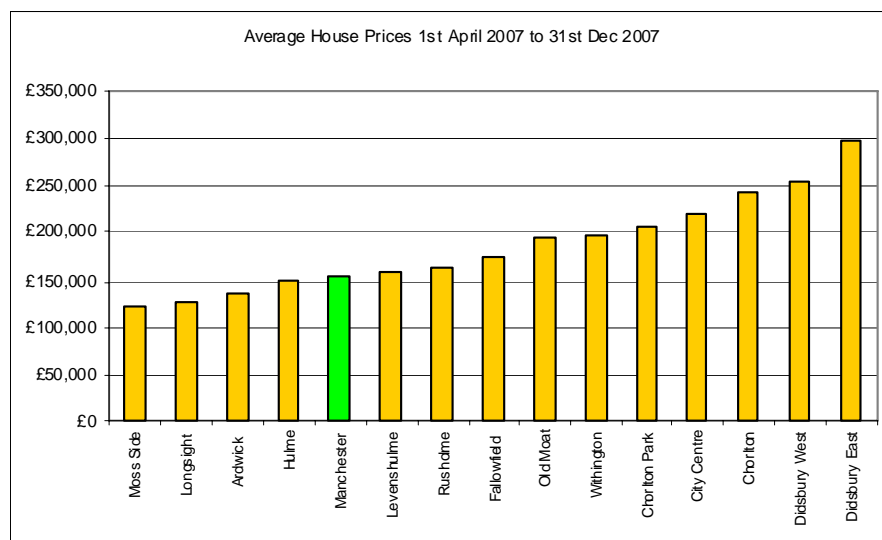
4.13 House prices pushing out families and established residents

4.13.1 Residents groups and their representatives feel that in certain areas where students concentrate streets can reach a 'tipping point' where existing residents sell up and move out and others are deterred from moving in.

4.13.2 Some financial modelling of affordability was undertaken as part of this study, and compared to house prices by ward (provided by MCC Housing Information Team). This modelling established that, based upon what they could afford, landlords and families would be competing for properties in a number of wards in South Manchester. In particular landlords looking for a short term return would be competing with families with one median (for Manchester) full-time income and one part time income for properties around £165k-£185k. Landlords looking for a longer term return would be competing with families with two median full-time incomes for properties around £220k-£240k.

4.13.3 The chart below illustrates average house prices by ward:

Figure 18 – Average house prices for Wards in and around areas of student concentration (Manchester City Council 2007)



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4.13.4 In terms of whether landlords are looking for short or longer term returns, the CLG Private Landlord Survey (2006) found 70% of landlords were individuals or couples, many of who viewed the property as a longer term investment/pension (this may be impacted upon by current market conditions).

4.13.5 It is therefore the case that the student landlords will sometimes compete with the lower to middle range of buyers from the family market in certain areas. At its lower limits of the student landlord market they will compete with landlords for the migrant worker market and at the upper end the young professional market.

4.14 Transience

4.14.1 The transient nature of students can engender a lack of community integration and cohesion and less commitment to maintain the quality of the local environment. The subsequent transient nature of the overall area can develop a gradually self-reinforcing unpopularity of the area for families.

4.14.2 The level of transience is high with, according to the Manchester HNA (2007), 67.6% of student households stating an intention to move within the next two years (this compares to an annual household turnover of 12.7% in Manchester). This high level of transience is to an extent inevitable given that average three year undergraduate lifecycle.

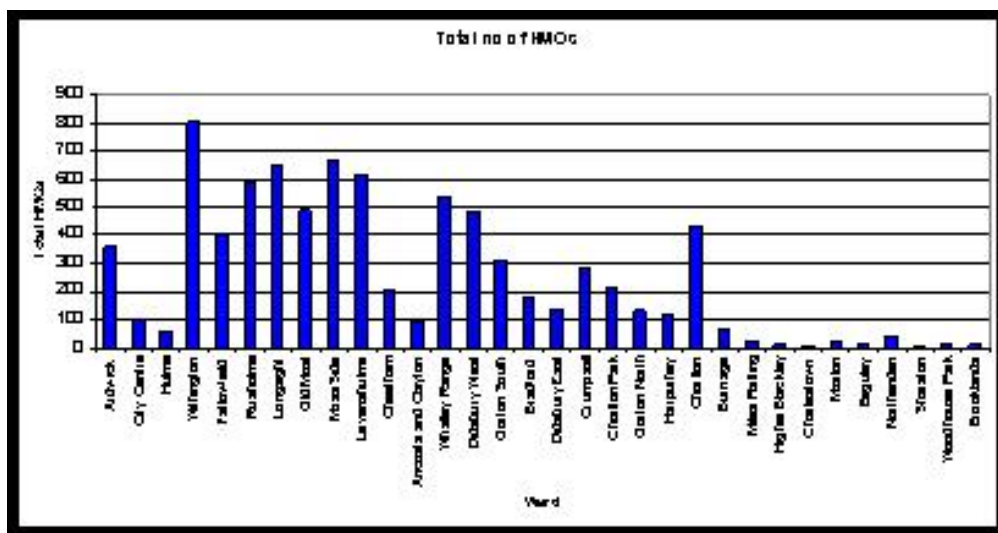
4.15 Tenure imbalance

4.15.1 With an estimated 86.6% of Manchester students living in private rented sector (Manchester HNA 2007), a high concentration of students can lead to high concentration of private rented properties.

4.15.2 Private rented properties make up around 15% of residential properties across Manchester, but students only make up about 16.5% of all households in the private rented sector (Manchester HNA 2007). Therefore a high level of private rented properties does not necessarily mean a high level of students, as there are other significant markets that also generate demand for private rented accommodation (e.g. young professionals and migrant workers). This can also be seen from the chart below, which shows the concentrations of private rented accommodation (based on the 2001 Census) in the wards in and around areas with concentrations of students. The areas with highest levels of private renting do not necessarily match those with highest levels of student concentrations.

Ward	% Private Rented properties
City Centre	47.5%
Ardwick	16.0%
Hulme	10.5%
Withington	36.5%
Fallowfield	20.0%
Rusholme	25.5%
Moss Side	16.5%
Longsight	25.5%
Old Moat	25.5%
Levenshulme	25.5%
Chorlton	25.5%
Chorlton Park	16.5%
West Didsbury	37.5%
East Didsbury	14.0%

Figure 20 – Numbers of HMOs by Ward



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4.16 Summary

- 4.16.1 In summary student presence within many neighbourhoods presents a range of problems and concerns for the other residents that live there. Some of these problems and concerns are an everyday reality for residents in these neighbourhoods and others deal with them at pressure times in the year – and whilst some concerns may be based on perception, the fact that they are concerns means they are likely to have an impact on those communities.
- 4.16.2 Students can be seen to have a very positive impact on the city, particularly economically and culturally, with a key role to play in its growth and development. However, that positive impact is generally on a City-wide basis.
- 4.16.3 From talking to residents it seems clear that their main concerns appear to be:
- Impact of students living in shared houses amongst existing communities
 - Growth and encroachment of students into more established communities
 - No one performing a supporting role for the students in the community
 - A lack of coordination between agencies in addressing student related issues
- 4.16.4 There is not always a correlation between those areas with highest concentrations of students and those with highest levels of often associated 'student issues'. Some of the same issues can also relate to young people house-sharing in general – and these numbers are likely to grow.
- 4.16.5 Some residents see 'studentification' as being the main issue affecting the quality of life in their neighbourhoods.
- 4.16.6 It is also important to remember that students themselves experience problems such as being victims of crime, violence and anti-social behaviour, as well as sometimes students feel outsiders in the community.
- 4.16.7 Against this background it also seems that whilst the Council has neighbourhood management teams working extremely hard to address problems generated by student accommodation, the Council's service response has not always been effective (particularly in the view of local residents' groups). In conjunction with this the universities involvement in neighbourhood management issues beyond their own properties is limited (again a view held by local residents' groups).

5 Towards a strategic approach

5.1 Introduction

5.1.1 In this section we have sought to address some of the key issues and questions raised by our analysis and the brief for this commission.

5.2 How significant are the issues?

5.2.1 The significance and nature of the issues tends to vary by neighbourhood. A number of neighbourhood types can currently be identified in relation to student accommodation. These are:

- Neighbourhoods with core concentrations of students such as Fallowfield, the Main campus area, and south City Centre and north Rusholme/Victoria Park.
- Neighbourhoods on the edge of and potentially under pressure from the 'core' – Rusholme, Withington, City Centre and Hulme.
- Neighbourhoods that are generally too inaccessible – this includes those in North and East Manchester, which are too far or more than one bus journey from the universities.
- Neighbourhoods of choice that are more expensive and less accessible for students – Didsbury, West Didsbury, Chorlton. However there are still shared houses and HMOs in these neighbourhoods
- Neighbourhoods that are less desirable and less accessible to students – Longsight, Moss Side and Levenshulme
- Neighbourhoods currently unattractive and unavailable to students, but offering future potential – Upper Brook Street, Plymouth Grove.

5.2.2 Whilst some of the issues and concerns raised about students are not necessarily supported by our analysis, there are undoubtedly serious issues associated with students in certain neighbourhoods of the City. The fact that some residents consider 'studentification' to be the biggest issue in their neighbourhoods should be a cause for concern and appropriate action.

5.2.3 As identified in the previous section, the main concerns appear to be the impact of students living in shared houses amongst existing communities and the growth and encroachment of those students, together with an absence of anyone supporting students in the community and a general lack of coordination in addressing student issues.

5.2.4 From discussions with Council officers, residents and other stakeholders these issues seem to be more noticeable (and raise more concerns) where they occur in previously relatively stable neighbourhoods. These occurrences of student issues encroaching on relatively stable neighbourhoods are greatest on edge of Fallowfield/Wilmslow Road 'core' in areas with 20% – 40% student households.

5.2.5 Some of the issues associated with students and student households can also relate to other households where young people share. Our analysis has identified a significant market generated by these households for shared private rented housing in and around the areas where students concentrate. With the forecast growth of younger people (20-34 year olds) in Manchester and likelihood that they will be attracted to neighbourhoods in and around the areas where students concentrate – combined with other factors such as the continuing trend for people to get married later and stay single longer is likely to mean

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a growing market of singles sharing rented flats and houses – means that outside the student market there is likely to be a growing demand for properties (including shared and private rented) in those neighbourhoods.

5.3 Managing the impact of students and landlords on neighbourhoods

5.3.1 Students and student accommodation will continue to be a feature of many of Manchester's neighbourhoods into the future. Therefore a significant part of any future strategy needs to consider how best to manage the impact of those students on the City and in particular how to manage their impact on the communities within which they choose to live.

5.3.2 Having a greater understanding of where students live and being able to identify the occupants and landlords of student properties is critical in being able effectively implement neighbourhood management initiatives.

5.3.3 Neighbourhood management initiatives have a key role to play in managing the impact of students and also the landlords who house them. In developing these initiatives it is important to build upon approaches currently being undertaken and developed in Manchester – both in areas with student concentrations and elsewhere – as well as learning from best practice approaches being implemented in other parts of the country.

5.4 Links with multi-agency neighbourhood management in Manchester

5.4.1 There are neighbourhood management initiatives being undertaken by the City which may have a future role to play in improving the management of areas with high concentrations of students. Initiatives identified include:

- North Manchester neighbourhood management group – led by the Council's Private Sector Housing team this group has been effective in mapping issues and developing targeted responses. It has helped to clarify the roles of the various agencies with regard to neighbourhood management and has set clear priorities.
- Respect Action activities – Respect Action and 'Proud of' initiatives which rely on a joint approach with input from a wide range of agencies to carry out a combination of enforcement activities while working with local communities to inspire a sense of pride in their neighbourhoods and respect for their neighbours.
- Targeted neighbourhood management initiatives - A number of initiatives are currently underway focussing on how neighbourhoods operate at present and what structures are required to enable them to work more effectively. The outcomes from this work will impact on the areas affected by this study.
- Community Guardians – set up 5 years ago, this is a volunteer programme where a 'Community Guardian' is a resident who 'adopts' their local area and who works closely with the Council to ensure that any environmental problems in the area are dealt with promptly. They report problems on their own street, or can keep watch on a few streets within their area.

5.5 Best practice elsewhere

5.5.1 In seeking to develop appropriate approaches to neighbourhood management a review has been undertaken of some of the approaches to addressing student related issues in other towns and cities in the UK. A summary of that review is attached at Appendix B.

5.5.2 Unfortunately because the issue of 'studentification' is something which local authorities and their partners have only relatively recently sought to address, there is currently a limited amount of evaluation work that exists on the various initiatives and approaches.

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Therefore identifying the potential effectiveness or otherwise of these initiatives and approaches has been difficult and Manchester will to an extent be required to take the lead, rather than necessarily be able to follow proven approaches.

5.5.3

The review summary highlights some key initiatives that were identified and analysed as part of this study, which it is felt could have a role to play in addressing problems in some of Manchester's neighbourhoods. Initiatives identified included:

- Community and Housing Forums - Set up and run by Leeds University it is attended by local stakeholders and members of the community interested in community and housing issues. The forum provides a platform to discuss key issues and concerns and present University policy and responses. It has given an opportunity for residents and Councilors to put their views and influence the University's Housing Strategy.
- Off campus student affairs manager and Council Student Manager – The Off campus student manager is a post created and funded by the University of Nottingham to co-ordinate matters concerning students who live off the main campuses (The Manager's job description is included at Appendix D). It involves liaising with external agencies, community and residents/tenants groups with the aim of building positive relationships with a dedicated role within Nottingham City Council. The post has had some success in better co-ordinating agencies dealing with student issues and in providing a point of contact for residents with concerns. The Council Student Manager is a post within Nottingham City Council, which functions alongside the University's off campus student affairs manager, to coordinate the Council's action in response to matters concerning students.
- Student term time address database – A database has been set up which contains term- time addresses for all students registered at the University of Nottingham. It has been found to be particularly useful for contacting students who have been involved in antisocial behaviour incidents that could result in them having to leave their studies. The database has also been used for notifying students about certain issues e.g. burglaries and has been used to identify trends in student living patterns.
- Neighbourhood helpline – In Nottingham this is funded by the University of Nottingham this is a voicemail service which is part of the remit of the Off Campus Manager. Those operating the service feel that it has worked effectively and addressed problems. In particular it has helped to form a stronger relationship with the local community. In Loughborough they have a 24 hour helpline operated and core funded by Loughborough University Security team. The helpline is answered 24-hours a day by members of the security team and is used by residents to report noise incidents etc. This is supplemented by a security patrol in key student residential areas. The security team have access to a student "database" to check if the property reported is registered to a student at the University (based on term time addresses provided by students at registration). It is understood that the University have had a good response to the service from residents, with around 300 complaints successfully dealt with from January-June 2008. The response comes from 3 community wardens who are part of the security team and handle issues of discipline and welfare off campus.
- HMO Action Zones – In Nottingham the Council have formed three new teams to concentrate their efforts and attention on three specific parts of the City where there is a high concentration of HMOs. Their role is to apply and enforce mandatory HMO licensing. Further to this the intention is to make an application to the Secretary of State for "additional licensing" which if approved will enable the Council to require all other HMOs, irrespective of size, to be licensed.

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- Landlords for Excellence – a training programme led by Sheffield City Council and Sheffield Hallam for landlords of multiple properties. Funded through Housing Market Renewal and Sheffield Hallam University, this scheme has been running for 3 years. They run three 10 week courses (one 2.5 hour session per week in the evenings) a year. Each course holds around 20 people and costs around £10,000. The course is free to all landlords, not just student landlords. The course covers all aspects of being a landlord e.g. legal requirements, HMO law, tenancy agreements, funding, taxation, marketing, business diversification and physical requirements of decent standard accommodation. Given its success the Council are looking to now part fund it through their mainstream budget.

5.5.4 In September 2008 the Government published a report entitled 'Evidence Gathering - Housing in Multiple Occupation and possible planning responses' which provided the outcome of an evidence gathering exercise reviewing the problems caused by high concentrations of HMOs. The report looked at towns and cities that had introduced measures to try and reduce the negative impacts of high concentrations of students through both neighbourhood management and planning measures. In terms of planning measures, these have only been able to have any impact on HMOs, i.e. purpose built halls, rather than control any increase in the number of private houses being rented to small groups of students to share. Attempts by local authorities to impose planning conditions to restrict occupancy to non-students have been removed by the Planning Inspectorate upon appeal. The report is available at www.communities.gov.uk.

5.6 Community cohesion

5.6.1 There is a need to improve understanding and communication between students and the communities within which they live. Selling the benefits of volunteering to students and involving them in benefiting their local communities will assist with this.

5.6.2 Ways of increasing volunteering and involvement should be explored, building on and learning from programmes involving the universities, such as the Manchester Leadership Scheme, Love Withington MMU Community Service and MMU Angels. In particular consideration should be given to the potential to use volunteers to support the universities' and Council's specific activities in improving neighbourhoods and neighbourhood management.

5.7 Dispersal – how many students is too many?

5.7.1 One of the questions raised at the outset of the commission was whether there a 'tipping point' where the proportion of student households becomes damaging to a street or neighbourhood, and whether dispersal of the student population would be an appropriate response? Following analysis it appears that if there is a 'tipping point' it is very likely to be different in different neighbourhoods, and will be dependent on the house type and make up of other residents in the neighbourhood.

5.7.2 The HMO Lobby – national pressure group – suggests an HMO (in this case referring to shared student houses rather than the strict definition of HMOs) 'tipping point' of 20% of population and 10% of households in particular areas. This level is probably too low as in Manchester student households make up around 6.5% of all households right across the City. In our view, based upon analysis of the issues and impacts, it could broadly be said as a guide that:

- <10% student households in a neighbourhood not generally an issue, due to their low level
- <20% can create issues but is generally manageable, as the locations where the concentration is below 20% tend not to experience significant levels of student related issues

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- 20-50% is likely to be in need of attention and view on future direction, as these are some of the areas where major concerns exist from residents' groups and officers
- >50% may require special management as areas of high student concentration.

5.7.3 However, we would emphasise that this is only a broad guide and should not be used as basis for policy or initiatives. We would be extremely cautious about an overly scientific approach. Concentrations/issues can vary by street and as identified in the earlier analysis, some of the problems causing most concern and particular issues can exist where areas with high concentrations meet more established neighbourhoods, rather than actually within the areas of high concentration themselves.

5.8 Dispersal – concentration or mix and integration?

5.8.1 The study considered whether dispersal of the student population would be an appropriate response. However:

- Students like other new arrivals in the City seek safety in numbers. Unlike other incoming communities the student community is constantly being renewed and hence remains newcomers to the City. Those that do remain and integrate cease to be students. Therefore there is an inevitability that the ever-changing student community will continue to seek to cluster together in certain locations.
- Rather than significant intervention in the market in the core areas of student housing, the response should instead be to manage some core areas, and work with the market and regeneration programmes to increase supply in other locations in order to achieve some shift in the patterns of location. Our analysis suggests that changes in the market combined with ongoing regeneration in key areas have the potential to work towards achieving this.
- Also Manchester – as with many cities – generally is not a balanced community. It has higher proportions of younger people, an ageing population and higher levels of social rented and private rented housing.
- However, it is recognised that it is an aspiration of the City Council to make Manchester more balanced, attracting and retaining more families. It is therefore important not to lose more families. There are concerns that student and other private landlords are often competing for same houses as families in certain areas, and that this is leading to the displacement of families. There is anecdotal information, which is supported by our high-level financial analysis, that in some locations they probably have been displaced.
- In certain areas high levels of students have been established over a long period of time. Those areas tend to be logical locations, close by and accessible to the universities' teaching and associated facilities. It is unrealistic, and possibly undesirable, to try to create them as mixed/balanced communities.

5.9 Halls or houses?

5.9.1 Halls provide students with security and inclusive bills, whereas general houses/flats provide them with lower rents and independence.

5.9.2 Purpose built accommodation has grown and developers feel it has capacity to grow further. The University of Manchester are confident based upon their demand profile that it could house up to 5000 of its returning 2nd and 3rd year students – who traditionally choose the general private rented sector – within purpose-built accommodation if in the right location (within easy and safe walking distance to the campus or on a major bus

route), of a high specification, with options for groups of students to live together and at a price that is broadly competitive with the market.

5.9.3 However there will always be a significant market from students wanting to live in general houses/flats. In particular there is a demand for larger properties (4 bed+) and letting agents feel that this is likely to continue.

5.9.4 It is likely the balance will change further, with further development of purpose built accommodation driven by market, but general private rented will still be significant.

5.9.5 Based on modelling of our estimates and broad assumptions the table below summarises the impact that a 10% (equivalent to approximately 4 new halls the size of Daisy Bank Hall) and a 20% increase in halls bed spaces over the next 5 years would have on the balance between students living in halls and those living in general private rented.

Figure 21: Impact of increasing halls bedspaces on the balance of students living in halls or general private rented

Increase in current halls bedspaces	Proportion of students living in halls	Proportion of students living in general private rented accommodation	Proportion of students living in elsewhere
0%	28%	59%	13%
10%	30%	57%	13%
20%	33%	54%	13%

5.9.6 Figure 21 illustrates that if you increase the proportion of halls bed spaces by a significant amount (say 20%) it may have a relatively manageable impact on demand for general rented accommodation (fall by 5%).

5.9.7 However, this combined with market shifts towards the City Centre and areas around the universities could significantly reduce/reverse the demand, and in some cases pressure, for student housing in existing areas of student concentration.

5.9.8 Some further degree in the change in balance from general rented to purpose-built halls should be facilitated by encouraging further new build halls within walking distance of the university as this can help take pressure off some areas, as well as accommodate growth in and demand from international students and provide better managed accommodation and environment.

5.10 Role of the City Centre?

5.10.1 Currently student households are concentrated just north of Mancunian Way, but seem to be spreading into the rest of the City Centre.

5.10.2 Whilst some developers and student accommodation providers view parts of the City Centre as a 'student market by default', resulting from difficulties letting generally and falling rents, the fringes of the City Centre are likely to and should have a continuing and important role in the future provision of accommodation for students. With their proximity to places of study as well as the plentiful attractions, facilities and housing that appeal to many young people, they provides a logical location for students.

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5.10.3 Concentrations of student households are likely to be less noticeable (and potentially less of an issue) amongst the younger population of the City Centre than in more established residential neighbourhoods. However there are also potential risks with increasing numbers in the City Centre, such as the impact of significant concentrations of student households on other households within the same apartment block.

5.10.4 Students could provide a potential solution to some of the empty properties that exist in the fringes of the City Centre. In some instances the opportunity may exist for student accommodation providers to take over whole failed or 'mothballed' residential developments on the fringes of the City Centre. Further consideration should be given by the City Council, universities and student accommodation providers to the potential for these existing whole blocks (or those with existing planning consents) on the fringes of the City Centre to be adapted for short term use for students. There may also be the potential to consider existing building adaptations or variations to existing consents to enable the provision of the larger units (e.g. 4 bed flats) that are more attractive to students and, which if used for students on a temporary basis, present the opportunity in the longer term to increase the general supply of larger units on the fringes of the City Centre.

5.10.5 Of course the provision of student accommodation in the City Centre needs to be controlled and to be balanced against the need to provide and support other uses and users, and in particular employment opportunities and the attraction of families and professionals. It will be important not use the City Centre's best land assets for student accommodation as a 'knee jerk' reaction to a downturn that will not last forever. Student accommodation, focussed on the fringes, therefore needs to be one part of a clear long term strategy for the City Centre.

5.11 How does the student market interact with other sections of the market?

5.11.1 As identified in our analysis there is an element of competition between student landlords and other parts of the housing market.

5.11.2 The key markets that it appears to compete and interact with include the young professional market, which in some areas it competes with over shared private rented properties, as well as acting as an attraction, bringing that particular market into areas where students live as well as the surrounding areas.

5.11.3 It also includes in some areas the family market, where certain types of properties like larger terraces and semi-detacheds fall within the target affordability range of both student landlords and families.

5.11.4 The other key market is migrant worker accommodation. This competes and interacts more with the lower end of the student rental market and in some of the more peripheral – less core – student housing market locations.

5.12 Future of market and its likely impact?

5.12.1 Limited future growth in student numbers is forecast by the universities – particularly compared to last 15 years. This limited growth is at present a best guess, as it could be affected by factors such as: competition; lifting of the fees cap; and overseas politics and economies.

5.12.2 The future of the housing market is always difficult to predict. In the short term we have the credit crunch which is impacting on a range of factors including the buy to let market, house prices, mortgage availability and first-time buyers. The rental market still growing

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as a result of a combination of still high values and now mortgage difficulties. There has also been a slowing (and in some cases ceasing) in City Centre development.

- 5.12.3 In the longer term there is likely to be a more common sense approach to investment than some of that witnessed over recent years. In the long term the market will probably undergo a rebalancing and correction which will be complemented by the City's ongoing regeneration programme creating more 'neighbourhoods of choice'.
- 5.12.4 Transport links will remain critical to the market. Wilmslow Road transport corridor is key to current student market locations (which focus along that corridor) and likely to remain a strong market factor which will attract and retain students.
- 5.12.5 Without any significant additional intervention beyond that currently proposed it is likely that the market will grow to the west and east of the main campus to absorb additional students and draw some from existing locations. However a concern is that those areas from where the students may be drawn are potentially those further away and the relatively weaker / less attractive neighbourhoods. Therefore they may draw more students away from Longsight, Levenshulme, Moss Side, Whalley Range, rather than Withington/Rusholme.
- 5.12.6 There is evidence already of changes in some markets, with Manchester Student Homes reporting difficulties letting some properties for September 2008. The reasons for this are currently unclear, but it may be a result of the growth in numbers of landlords and rental properties in recent years, combined with more students choosing the City Centre (where MSH do not have many properties), the impact of additional new build halls, and possibly the increase in students choosing to live at home with their families.
- 5.12.7 The impacts of 'de-studentification' is likely to be less of a concern in the more peripheral parts of core student neighbourhoods like Fallowfield, Victoria Park and Withington, where it is likely that any of the stock in these areas (much of which is semi-detached properties and larger terraces) that could be vacated will be in demand from other markets such as young professionals and families. Also where 'de-studentification' impacts on larger properties in some more peripheral student neighbourhoods like Longsight and Levenshulme, again it is likely that any vacated stock would be in demand for gentrification and from BME communities (competition in these neighbourhoods for large properties from these groups were identified by the Pathfinder's Drivers for Change).
- 5.12.8 However in locations with high levels of smaller (often back-of-pavement) terraced housing, situated in some those neighbourhoods that are slightly more peripheral to the core of student accommodation, such as Moss Side and Longsight, the vacated properties are less likely to be attractive to the BME, young professional and family markets and it is difficult to identify what markets these units may attract.
- 5.12.9 The Council need to keep a close eye on those housing markets that are at risk from 'de-studentification' with continued local analysis as part of their ongoing HMRI work. 'De-studentification' carries with it some potential risks that include reduction or loss of public and private services and increased empty properties. This ongoing analysis needs to take account of the impact not just on the housing, but on the wider neighbourhood.

6 Strategic response and Action Plan

6.1 Strategy Response

6.1.1 From the conclusions reached in the previous section regarding the questions and issues raised by the brief and addressed by our research, we have in this section of the report produced the basis of a strategy. That strategy is a combination of:

- Neighbourhood management improvements by:
 - Bringing greater focus and co-ordination to the Council's and key partners response to student issues
 - Encouraging a more active role from the two universities in supporting their students living in the wider community
 - Providing clearer and accessible points of contact and channels of communication for residents to raise issues and concerns regarding students
- A degree of 'managed distribution' (rather than dispersal) of student accommodation within the City by:
 - The restriction/encouragement of development of private halls in certain locations
 - Enabling new housing development that can better cope with student issues
 - Using students to develop products and achieve regeneration in certain areas
 - Having a greater focus of student accommodation around main university campus
 - Some HMO controls/restrictions/limits where/if available
 - Using the potential for market adjustment to help

6.1.2 Below we have set out a number of recommended actions to deliver this strategy.

6.2 Strategy Response 1

Develop and improve neighbourhood management approaches to areas with concentrations of student households

6.2.1 This strategy response should apply to both the 'core' areas of student household concentration (in Fallowfield and around the main university campuses) and for those neighbourhoods on their edges (such as the City Centre, Hulme, Ardwick, Rusholme, Victoria Park and Withington).

Justification

6.2.2 Improved neighbourhood management is required in order to better manage the impact of students on the City and in particular on its more established communities. As outlined above, improvements need to lead to a better coordinated response to and resolution of issues and to provide more of a supporting role for students. Importantly, as well, they need to help and protect students themselves, who can be particularly vulnerable members of the community.

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Response

- 6.2.3 The mainstreaming of good neighbourhood management, which the City Council and its partners are currently developing across the City, is an essential prerequisite of providing effective management to these areas. Initially in these areas, due to the scale and importance of the issues present, there will be a need for specific neighbourhood management tools and approaches to be considered. If these are successful their management should then be mainstreamed by the City Council, the universities and other partners. These tools and approaches could include:
- **Off-Campus Manager and Lead Council Officer** – The issues related with students living within the community are so significant and cut across the work of so many departments and agencies that a new post of Off-campus manager together with a Lead Council officer dealing with student-related issues could help to significantly help the response to those issues. The Off-campus manager should be a newly created full-time post for an individual with the role of providing a clear point of contact for residents to raise issues with students and of pulling together and co-ordinating the universities' response to the whole host of student related issues that occur off campus. The post could operate jointly between MMU and the University of Manchester, reporting to a joint executive of the universities. The Off-campus manager would interface directly with the Lead Council officer to coordinate the Council's response and approach to student issues.
 - **Helpline** – The provision of a Helpline would support the work of an Off-Campus Manager. The Helpline would be targeted at residents within those communities affected by student issues.
 - **Student Term-Time Address Database** – The success of neighbourhood management and other initiatives related to students is dependent upon being able to identify student households as well as the specific residents and owners. A database based upon term time addresses provided by students at registration would therefore be very important.
 - **Student Area Management Steering Group / Neighbourhood Management Group** – Linked into the Community Forums this should be a group that brings together all the key delivery agencies responsible for addressing student related issues. With an area specific remit, focussing on the 'core' student areas and their surrounding neighbourhoods, their purpose will be to ensure a co-ordinated and focussed response to student related issues. An initial task for the groups will include the development of an Action Plan for the coming year that will identify key neighbourhood issues, actions, leads and timescales for delivery. The Group will also manage 'fresher's week' to minimise the negative impact of the new intake of students each year, taking a similar approach to other 'special' event management in the City when there is a significant influx of people into the city, which require a more intensive response in the delivery of services over a time limited period to minimise the impact on neighbourhoods. The Off-campus manager and Lead Council officer will also provide a focus on developing and co-ordinating approaches for student engagement and community cohesion. This will help to ensure that activities and resources are coordinated and the opportunity to develop new initiatives maximised with the relevant partners. They will be supported in this work by relevant Ward Support Officers, the Campaigns Team, and MCCs Community Engagement Team. This will serve to strengthen the work of the Crime and Disorder Partnership and will assist in communicating issues across the relevant agencies and departments. This will in turn strengthen the Respect Action and 'Proud of' agendas and lead to a more positive, participative approach to living in these areas.

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- **Targeted neighbourhood management initiatives** – A number of initiatives are currently underway focussing on how neighbourhoods operate at present and what structures are required to enable them to work more effectively. The outcomes from this work will impact on the areas affected by this study.
- **Student Volunteers** – A scheme to attract student volunteers, based upon the Council's Community Guardian Scheme. In particular this could be used to provide resources to support the Off-Campus Manager in their role. Student Volunteers could be identified for particular areas with high levels of student accommodation and could be used for example to make fellow students in that area aware of appropriate crime prevention responses in the event of an increase in crime in that area. Or if there are issues over rubbish being left out they could be used to inform fellow students about the impact they are having on neighbours and collection services. Importantly it would not be an enforcement role but in an education and awareness role.
- **Community Forums** – In addition to the existing Ward Coordination forums where neighbourhood issues are raised, the setting up of additional forums focusing solely on student issues would provide an opportunity to discuss these with the universities and the Council. These forums would be attended by all relevant stakeholders including local residents and Councillors.
- **Other potential initiatives** – Other initiatives that should be considered include variations of the Respect Action initiatives focussing on student issues in the key weeks when students arrive and leave and the Landlords for Excellence training scheme which could be linked into the City Council's Landlord Accreditation Scheme.

Issues/impacts

6.2.4 The key issues and impacts with these recommendations will be that they are likely to require reallocated, redirected or additional resources from the Council and universities in order to be effective. The following is a summary of some of those resource implications:

- **Off-Campus manager** – The post itself, together with accommodation and office running costs would be around £60k per annum and could be run initially on a pilot basis. There would also be the potential requirement for some allocation of existing staff time within the universities and Council to support this role. However this may be cancelled out by greater efficiency savings elsewhere generated by a more co-ordinated service and response. It is envisaged that this role would be funded by the two universities.
- **Lead Council Student Officer** – This will require a lead officer from the Council to assume overall responsibility for issues relating to students. This officer will work closely with the Off-Campus Manager.
- **Helpline; Community Forums and Steering Groups; Student Volunteers** – The costs associated with these initiatives should be relatively low but will need to be examined in greater detail.
- **Targeted Neighbourhood Management Initiatives** – Managing and running the initiative for just one area will require around one full-time and one part-time member of staff. In addition responding to and addressing the additional issues and problems identified as part of the more intensive approach to the area will mean an extra burden on the delivery of a range of other services such as enforcement, legal and cleansing. It is anticipated that there may be some costs associated with the provision of additional services. This will require more detailed analysis to determine the appropriate funding.

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- Student term-time address database – as an additional element to the existing annual student registration process, this database could be compiled with limited additional requirement for resources. The database could be accessed and utilised by the Off-Campus Manager.

6.2.5 As well as the resource issue there is also an issue about linking into existing forums and structures. In particular structures around the Crime and Disorder agenda such as Neighbourhood Partnerships and Partnership Business Groups along with Ward Co-ordination need to link into any new structures and initiatives.

6.3 Strategy Response 2

Greater HMO controls

6.3.1 This strategy response is currently being developed by Private Sector Housing in conjunction with Planning and will reflect the current position in HMO licensing.

6.4 Strategy Response 3

Provide a better accommodation offer for students in appropriate locations

6.4.1 Strategy Responses 3 relates to the opportunities to further develop purpose built student accommodation on sites within the main university area and on the fringe of the City Centre, Birley Fields and the Fallowfield campus. The following criteria would be used to assess each proposed development:

- Sites should be easily accessible to the University campus by walking, cycling and public transport.
- High density developments should be sited in locations where this is compatible with existing developments and where retail facilities are within walking distance. Proposals should not lead to an increase in on-street parking in the surrounding area.
- Proposals should contribute to providing a mix of uses and support district and local centres, in line with relevant Strategic Regeneration Frameworks, local plans and other masterplans; and by closely integrating with existing neighbourhoods to contribute in a positive way to their vibrancy without increasing pressure on existing neighbourhood services to the detriment of existing residents.
- Proposals should be designed to be safe and secure for their users, and avoid causing an increase in crime in the surrounding area. Consideration needs to be given to how proposed developments could assist in improving the safety of the surrounding area in terms of increased informal surveillance or other measures to contribute to crime prevention.
- Consideration should be given to the design and layout of the student accommodation and siting of individual uses within the overall development in relation to adjacent neighbouring uses. The aim is to ensure that there is no unacceptable effect on residential amenity in the surrounding area through increased noise, disturbance or impact on the streetscene either from the proposed development itself or when combined with existing student accommodation.
- Consideration should be given to provision and management of waste disposal facilities within the development at an early stage.

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- The developer will be required to demonstrate that there is a demand for additional student accommodation in terms of waiting lists for existing places.

6.4.2 There is the opportunity to accommodate a slight increase in student households in the proposed areas as part of their regeneration as mixed neighbourhoods.

Justification

6.4.3 Some additional students living in these areas can make a positive contribution to the ongoing regeneration of these neighbourhoods, by helping create housing demand generally, and in particular demand for larger flexible residential units that can become family homes in a future changing market, as well playing an important role in helping to support existing, new and emerging local services.

6.4.4 Student accommodation in these areas, within walking distance of the main university campuses will be more sustainable and accessible development. It will also be attractive to growing international student population, which generally likes to be close to their place of study.

6.4.5 The evidence base suggests that an increase of between 10% and 20% in student hall provision could provide a focus for student accommodation in these areas. This strategy and any proposed locations should be reviewed after 5 years.

6.4.6 Some increase in student population in these areas will help to support neighbourhood centres and services in the wards surrounding the Main University Area. It can also help to relieve some of pressure for student accommodation felt in other areas. This will be helped by a slowdown in the growth of student numbers and a general increase in purpose-built accommodation.

Response

6.4.7 In response the Council should, through planning and its regeneration strategies, encourage larger flats together with some limited additional purpose-built student accommodation within the main university area and on the fringe of the City Centre, Birley Fields and the Fallowfield campus.

6.5 Funding

6.5.1 A number of the recommendations that we have made will have funding implications if they are pursued. In particular some of the neighbourhood management interventions will either require the diversion of existing resources or additional funding.

6.5.2 A key question relates to the availability of “new” forms of funding – be this through forms of discretionary grant aid made available through Government or its agencies or through revenue raising activities and / or initiatives.

6.5.3 Unfortunately, but perhaps unsurprisingly, the potential to raise grant funds that directly focus on the specific issues raised within this report is limited. There are no obvious grant funding mechanisms that directly correspond with the specific proposals set out above. There are, however a variety of neighbourhood management initiatives and funds made available through central government (Working Neighbourhoods Fund, Stronger and Safer Communities Fund being the most obvious) and it may be possible to develop project proposals that meet the criteria of these funding sources.

6.5.4 Significant additional funding from the private sector is unlikely and without specific policy changes to enable funds to be raised from landlords for example, this is likely to remain

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the case. Some additional small public sector grants funds may be available and should be explored. However, these are unlikely to provide a sustainable long term solution.

6.5.5 It is therefore likely that the main sources of existing resources or additional funds to implement some of these recommendations will need to be the two universities and the Council.

6.5.6 Addressing the neighbourhood management issues in particular through an enhanced intensive approach will involve re-shaping of services and hard decisions to be made about what does and does not get prioritised. The re-shaping and the decisions will have to take place in a context where it is very unlikely that there will be significant additional resources available from the Council, the universities and other partners.

6.6 Delivery mechanisms

6.6.1 There is not felt to be a need to put a specific delivery mechanism or vehicle in place to oversee the implementation of this work. However a structure based around the City Council and the Off-Campus Manager, would we feel help to better co-ordinate and drive forward a more effective response to addressing student related issues.

6.6.2 As broadly outlined in our Strategy Response 1, we think the approach should be lead by the Student Steering Group and that the direction and priorities of this approach should be informed by the Community Forum. These groups will be facilitated and supported by the City Council and the Off-Campus Manager, who will be charged with overseeing the co-ordination and implementation of the actions arising from those groups.

6.6.3 The non-neighbourhood management related recommendation can generally be delivered through the planning, housing and regeneration functions of the Council.

6.7 Timescales

6.7.1 Set out below are some of the key timescales related the recommendations above:

6.7.2 Strategy Response 1 – Critical to much of this is putting in place an Off-Campus Manager and Lead Council officer, together with the structure they will work to. Much of this response could begin to be implemented immediately and, subject to funding being identified, both the Off-Campus Manager and Lead Council Officer could be put in place within 6 months.

6.7.3 Strategy Response 2 – In development.

6.7.4 Strategy Response 3 – This will be tied in with the regeneration of the areas surrounding the Main University Area and the opportunities that arise to further develop the university campuses.



Appendix A – Manchester Student Accommodation Survey 2008

Manchester Student Accommodation Survey 2008

Introduction

1. As part of the study a survey was undertaken of students. The survey involved e-mailing current students at Manchester University and MMU using a number of databases held by the universities and student unions. The e-mail included a link to an on-line questionnaire.
2. The survey received 3,677 responses. This represented a significant sample – c.6% of the Manchester based MMU and Manchester University students. This means that many of the findings will have a high degree of reliability. However, in terms of the students that did respond we would highlight a number of issues which may affect the reliability of some data:
 - 80% of the respondents were studying at the University of Manchester – as mentioned earlier there are some differences between the balance of types of students that attend the two universities and whether they live at home.
 - In terms of the areas where respondents live, Fallowfield accounted for 29% of all respondents, whereas the following areas accounted for 1% or less of the responses each: Moss Side, Longsight, Levenshulme, Chorlton, Whalley Range, Didsbury and West Didsbury – this low sample may affect the accuracy of some area specific findings for these neighbourhoods.
 - There was a relatively higher response from students living in halls with 62% of respondents living in halls, and 36% living in general private rented accommodation.
 - 51% of respondents were 1st year students

Key findings

3. The following are some of the key findings from our survey.

Who lives where?

4. In terms of age, students in the City Centre, Main University Area, Rusholme, Victoria Park and Fallowfield neighbourhoods tend to be dominated by the 19-20 year old age group, where this age group accounts for between 41% and 59% of student respondents in each of these areas.
5. In Withington the main age group is slightly higher with 20-21 year olds accounting for 60% of respondents in the area. Generally the rest of the neighbourhoods with significant student populations (Hulme, Moss Side, Levenshulme, Chorlton, Whalley Range, Didsbury and West Didsbury) tend to have higher proportions of older students.
6. The gender split of respondents overall was about 60/40 female to male, which generally reflects the make up of students at the universities. The proportion of females was significantly greater (70%) in both Withington and Didsbury, and in Moss Side (75%).
7. Married students accounted for only 4% of all respondents, but make up a significant proportion of student respondents in Levenshulme (25%), Chorlton (19%), Hulme (15%) and Longsight (13%). Those living with a partner accounted for 8% of all respondents, and accounted for more significant proportions in Hulme (27%), Moss Side (25%), Chorlton (38%), Whalley Range (43%) and West Didsbury (22%).
8. Single respondents dominate most in the Main University area, Victoria Park, Fallowfield and Withington.

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9. 2% of all respondents have their children living with them. This is significantly greater in Hulme (10%), Longsight (8%), Levenshulme (13%), Chorlton (13%) and Whalley Range (7%). The proportion is below average in the City Centre, Main University Area, Victoria Park, Fallowfield, Withington and Didsbury.
10. 75% of all respondents are full-time undergraduates. However in some areas they accounted for more of the respondents – Victoria Park (77%) and City Centre (79%) – and in some cases significantly more – Rusholme (85%), Withington (94%) and Fallowfield (90%).
11. 16% of all respondents are full-time post graduates. However in some areas they accounted for more of the respondents – Main University Area (29%), Hulme (28%), Victoria Park (20%), Longsight (23%), Chorlton (25%) – and in some cases significantly more – Levenshulme (38%), Whalley Range (57%), Didsbury (35%) and West Didsbury (37%).
12. Part time students were 1% of all respondents. While this small sample makes conclusions difficult, it indicates a particularly high proportion of these respondents living in Levenshulme (19%).
13. Overall respondents broke down into 70% British, 17% International and 8% EU. British students were particularly dominant in Moss Side (90%), Fallowfield (87%), Withington (92%) and West Didsbury (81%). The proportion of International students is significantly above average in the Main University area (39%), Hulme (30%), Longsight (26%), Levenshulme (25%) and Whalley Range (43%).
14. 51% of all respondents were 1st year students. Neighbourhoods where 1st years exceeded that proportion were Hulme (57%), Didsbury (52%) and Fallowfield (52%), and those where they significantly exceeded it were the City Centre (67%), Victoria Park (62%) and the Main University area (68%). The neighbourhood with by far the lowest proportion of 1st years was Withington where 1st years accounted for only 6% of the respondents.
15. In summary, while we need to be cautious about the findings for some of the neighbourhoods with low level of respondents and be aware that the respondents were dominated by 1st years, we can draw a number of broad conclusions:
 - Younger students and those starting their studies tend to concentrate in the areas which are established student locations that already have high concentrations of student households, significant numbers of halls and are close to the universities – in areas such as the City Centre, the Main University Area, Victoria Park and Fallowfield.
 - Withington whilst sharing a similar profile with the above areas in terms having a higher proportion of single students, it does tend to attract a relatively higher proportion of its students from slightly older age groups and more advanced in their studies.
 - A significant proportion of those attracted to the Main University Area are post graduate and/or international students, whereas areas like Fallowfield and Withington are dominated by British undergraduate students.
 - Those students who are married, living with a partner and/or with children, form a more significant part of the student population in the slightly more peripheral neighbourhoods, outside the core of student household concentrations. These include areas such as Hulme, Longsight, Levenshulme, Chorlton, Moss Side, West Didsbury and Whalley Range.

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Who pays what?

16. 26% of all respondents paid £60-£70 per week for accommodation with only 9% of respondents paying under £60. Unsurprisingly married respondents generally paid more with 46% paying over £100 for accommodation compared to just 6% of single respondents.
17. When comparing the type of student and the amount paid for rent, the most common rental levels paid by student type are:
 - Full time undergraduate – 30% paid £60-£70
 - Exchange/visiting students – 30% paid £70-80
 - Full time postgraduate – 28% paid £90-£100
18. British students appear to pay less for accommodation on the whole; with the largest proportion (31%) paying £60-£70 compared to International and other EU students who pay more, with the largest proportion of these paying £90-£100 (26% and 27% respectively).
19. The area in which students live has an influence on how much they pay for rent. Most noticeable in this is Withington, where 57% of respondents living in the area (more than twice as many as the average across all the areas) paid £60-£70. Other significant differences are found in Moss Side and Rusholme, where significantly larger proportions of respondents (40% and 37% respectively) paid lower rents of £50-£60. Respondents in Victoria Park paid the highest rents with 52% paying £90+.

Numbers living together

20. 31% of all respondents lived in households of 8 or more people. This will have been skewed by the high level of responses from those living in halls. 43% of exchange students and 36% of full time undergraduate students live in households with 8 or more people in them. 43% of part time students live in households of 2 people as do 20% of full time postgraduate respondents.
21. The key areas with households of 8 or more people are; Fallowfield (46%), Main University area (42%), City Centre (41%), Victoria Park (39%) and Didsbury (39%). The number of people in households across other areas is more evenly split.

Satisfaction with Accommodation

22. Probably unsurprisingly, the most significant proportions of those who were “very satisfied” with their accommodation were amongst those living at home with their parents and living in their own properties. Of those in rented accommodation, over half of respondents were either “satisfied” (47%) or “very satisfied” (16%) with their accommodation, with only 13% being “very unsatisfied”.
23. In most areas, “very satisfied” and “satisfied” with accommodation accounts for around 70% of respondents. A notable exception to this was in Levenshulme, where 44% and 38% of respondents were “unsatisfied” and “very unsatisfied” with their accommodation. Contrasting this, in Chorlton, 56% of respondents were “very satisfied”.

Satisfaction with Location

24. 40% of all respondents were “very satisfied” with their location with a further 32% being “satisfied”. 65% of respondents in Didsbury were “very satisfied with the location. Locations which differ from this include Levenshulme where 44% of respondents were “unsatisfied” with the location. 26% and 25% of respondents in Longsight and Moss Side were also “unsatisfied” with the location.

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25. In general, levels of satisfaction with location were significantly greater than those with accommodation.

Preferred locations to live

26. Asked which areas they would prefer to live in, the most popular responses were:

- City Centre – 28%
- Main University area – 23%
- Fallowfield – 22%

27. All other areas achieved less than 10% of the preferences.

Travel

28. The most popular main methods of transport for respondents were bus and walking – both with 38%. Only 3% of respondents used cars as their main method of transport.
29. Those locations further away from the main University sites – e.g. Chorlton – had a greater percentage of respondents using cars and cycling (in this case 19% and 38% respectively) as their main method of transport.
30. Other notable variations included 67% of Fallowfield respondents taking the bus and 76% and 68% respectively of Main University area and City Centre respondents walking.

Ratings

31. When asked to rank importance of a range of factors in their decision about where to live (on a scale where 1 = not important, to 5 = very important) a number of factors stand out as receiving a high percentage of “very important” rating:
- Safety and Security –
 - 42% of all respondents ranked this a 5
 - 49% of female respondents ranked this factor a 5, compared to 36% of male respondents
 - 48% of exchange/visiting students and 53% of postgraduates ranked safety and security as a 5 compared with 43% of full time undergraduates.
 - Price –
 - 38% of all respondents ranked this a 5
 - Price appears to be more of an issue for full time postgraduates with 47% of respondents in this category ranking price as a 5, compared to 39% of full time undergraduates and 37% of exchange/visiting respondents
 - Living with friends –
 - 29% of all respondents ranked this a 5
 - For 34% of full time undergraduate students, this was ranked 5 compared to just 10% of exchange/visiting students and 14% of full time postgraduate students

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- Local shops, services and other facilities –
 - 29% of all respondents ranked this a 5
 - This was an important factor for exchange/visiting, fulltime postgraduate, and full time undergraduates with 32%, 30% and 33% of respondents from these categories ranking this factor a 5.
 - Being near friends –
 - 21% of all respondents ranked this a 5.
 - This factor is more important to full time undergraduates with 24% of respondents ranking this a 5
32. The factors that were not ranked as being so important by respondents include living with students from your own year (18%) and living with students from your University (18%).

Likelihood of staying in Manchester

33. 19% of respondents thought that they were “very likely” to stay in Manchester after graduation. A further 33% thought that they were “likely” to stay. 54% of respondents thought that if likely to stay, they would locate within the City Centre. Other popular locations were Didsbury (35%), Withington (25%), West Didsbury (20%) and Fallowfield (19%).



Appendix B – Best Practice Review

Leeds University

[Note: The following information details examples and approaches taking place in other cities with a significant student population. As stated in the report limited evaluation is available at present]

Housing Strategy

1. The University of Leeds was the first higher education institution to produce a housing strategy in 2005. The University operates a number of different policies/initiatives aimed at reducing the impacts of students. These include:
 - Community Planning Officer (funded annually) – advise and support the community/community groups on planning applications/system
 - Flyer Consent Zone enforced in student areas
 - Enforcement initiative for letting boards under Town and Country Planning Act (Control of Advertisements) Regulations 2006
 - Area of housing mix

Area of housing Mix

2. The Unitary Development Plan (2005) presents proposal for dealing with student housing issues under proposals for “Area of housing Mix”. The Council has set out to use its development control powers to manage provision of additional student housing and to maintain a diverse housing stock to cater for all sectors of the population including families. It will also encourage proposals for purpose-built student housing that will improve the total stock of student accommodation, relieve pressure on conventional housing and assist in the regeneration of areas in decline or at risk of decline.
3. This approach will apply within an Area of Housing Mix (under policy R2 as an area policy initiative) covering Headingley, Hyde Park, Burley and Woodhouse where students form a significant part of the population and adjoining areas of Moor Grange and Lawnswood where pressure is likely to come for further student housing.

Policy H15

4. Within the Area of housing Mix permission will be granted for housing intended for occupation by students, or for the alteration, extension or redevelopment of accommodation currently occupied where:
 1. The stock of housing accommodation, including that available for family occupation, would not be unacceptably reduced in terms of quantity and variety
 2. There would be no unacceptable effects on neighbours living conditions including through increased activity, or noise and disturbance, wither from the proposal; itself or combined with existing similar accommodation
 3. The scale and character of the proposal would be compatible with the surrounding area
 4. Satisfactory provision would be made for car parking
 5. The proposal would improve the quality or variety of the stock of student homes.

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Policy 15a

5. The council will work with the universities and with accommodation promote student housing developments in other areas by identifying and bringing forward development sites that would satisfy the following:
 1. Have good connections by public transport to the Universities, either existing or to be provided to serve the development; or be close enough to enable easy travel on foot or by cycle
 2. Be attractive to students to live and of sufficient scale to form a viable student community, either in themselves or in association with other developments
 3. Be well integrated into the surrounding area in terms of scale, character and associated services and facilities
 4. Contribute directly to the regeneration of the surrounding area, preferably as part of comprehensive planning proposals
 5. Not unacceptably affect the quality, quantity or variety of the local housing stock.

Other Initiatives

6. The University has also established two new groups to facilitate communication and dialogue relating to Community and Housing issues:

Community and Housing Forum

7. The forum was set up in 2007, and is held annually. It is run by the Access and Community department from Leeds University and seeks attendance from all key local stakeholders and members of the community interested in community and housing issues.
8. The forum provides a platform to discuss key issues and concerns and present University policy and responses. The forum provides the opportunity for the University to feed back to residents and community groups the progress made on the Housing Strategy, and gives stakeholders an opportunity to make suggestions for additional actions to be taken to address their issues. The University will then adapt the Strategy accordingly.
9. Prior to the formation of the Community and Housing Forum, the university found it had complaints from the same groups of residents. The University struggled in particular to engage with BME groups. On the back of the Community and housing Forum, the University invited and met with Councilors from six of the most student populated wards who in turn brought ideas from the local community. From this meeting three key projects were defined in addition to the Housing Strategy that focused on the needs of local residents. Feedback from this meeting has been that both Councilors and residents have had the opportunity to put forward their views, and have seen actions made to address – wherever possible – their issues.
10. The actions taken under the Community and Housing forum are mainly funded through the Higher Education Communities Active Fund, core funding from the Universities and other sources, e.g. volunteering funds.

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Community and Housing Steering Group

11. An internal Community and Housing Steering Group has also been convened, to develop policy and practice to support and response to emerging community and housing issues. The group will provide a structured communication channel on community and housing issues. Members of the group include:
 - Head of Residential and Community Services
 - Community Police Officer
 - Head of Accommodation
 - Union Service Manager
 - Union Community Rep
 - Head of Security
 - Head of Sport
12. The Steering group discusses the progress of the Housing Strategy and any emerging issues. It also helps to steer the response of the University, City Council etc on planning guidance and neighbourhood issues.

Nottingham University

Overview

1. The number of students attending the University of Nottingham (UoN) has increased substantially over the last 10 years. This of course means that a large number of students attend the university, living either on campus, in purpose built accommodation, or private sector houses within the community. Some districts in the City and Broxtowe have very high numbers of resident students. This brings diversity to many areas but can also create issues and concerns to residents residing in that area.
2. The most common complaints in these neighbourhoods where students dominate are complaints of noisy parties, dilapidated houses, rotting mattress in gardens and overflowing wheelie bins, together with student cars clogging the narrow streets of terraced houses.

Addressing crime issues

3. Crime is also a significant issue in Nottingham. Nottinghamshire Police and the University are delivering campaigns to reduce burglary, working with the student union and community groups:

www.easily-done.co.uk

4. "Easily Done" offers students in Nottingham information about how to prevent and protect themselves against crime. It offers simply, step-by-step suggestions about preventing burglary, where police patrols occur, how to report incidents, and "SmartWater" a free property marking solution.
5. In 2007, burglary against students in Nottingham was nearly 20 per cent down on the year before, attributable in part to campaigns such as Easily Done.

Registering Students

6. The University of Nottingham has addressed its responsibilities as a key player in the local community; although not legally responsible for the actions of students outside university premises it believes it has a moral responsibility to take action. The University has included a commitment to recognising responsibilities to the local community in the declaration each registering student has to sign:

"I also acknowledge that I have responsibilities to the community of Nottingham in which I am temporarily resident and undertake to act with consideration and respect for the welfare and interests of members of the wider community and my fellow students"

Community Initiatives

7. The University of Nottingham continues to develop its role in the wider community, through the work of the Active Communities Team and Student Community Action.
 - The Active Communities initiative is engaged in the development of a range of partnerships that benefit the community and University alike. Underpinning the initiative is a belief that the University has much to offer the wider community by way of sharing the time, skills and expertise of its employees and students.

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- Student Community Action gives students the chance to get involved in volunteering in and around Nottingham, helping the local community, where a high proportion of the students reside. Working with more than 70 organisations, there are plenty of opportunities to work with people, last year over 1000 students volunteered.

Off Campus Student Affairs Manager

8. The Manager for Off-Campus Student Affairs, co-ordinates matters concerning students who live off the main campuses. This involves liaising with external agencies, community and residents/tenants groups with the aim of building positive relationships.

Funding and Cost

9. The position has been in place since 2004, is permanent and core funded from the University sitting within the Registrar's department. The position is graded at Admin, Professional and Management (APM) level 5 (as at May 2008), and equivalent to £41,089 - £59,092 (including pension and national insurance).

Job Description

10. Please see Appendix D for the job description.

Impact of the position

11. Although difficult to quantify (and with no formal evaluations having been carried out), anecdotally the position has been very well received by students, the Universities, Nottingham City Council and other key stakeholders such as community groups.
12. People see the position as a way of "getting into" the university and addressing the issues that they have. This is especially the case for community groups who know who to go to and have someone to listen to their problems, and help to resolve – wherever possible – the issues.

Key successes

13. The position has been instrumental in bringing together various agencies important to the student community and developing methods of partnership working. This includes the Police, City Council etc. A joint strategy has been put in place to deal with students that has buy-in from all key agencies. For example, the Off-Campus manager works closely with the Student Strategy manager from Nottingham City Council thus providing a clear approach to waste, environmental health, planning, and landlord management.

Issues

14. Particular issues that the current Off-Campus manager has encountered include:
 - Lack of time to satisfy and address all complaints and issues – this is owing to the fact that there is no team to support the manager
 - The position relies on developing and maintaining good will with key partner agencies – it is sometimes difficult to manage these relationship and address everyone's needs
 - Resources – as is the case with most pro-active positions, resources are an issue. The University are currently looking at whether Post-Graduates could support the Off-Campus manager so as to increase student involvement in community issues and develop the service more widely

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Access to Information

15. A database has been set up which contains term- time addresses for all students registered at the University of Nottingham. This is particularly useful for contacting students who have been involved in antisocial behaviour incidents that could result in them having to leave their studies. The database has also been used for notifying students about certain issues e.g. burglaries and has been used to identify trends in student living patterns.

Community Chest Fund

16. The University of Nottingham's 'Community Chest Fund' is aimed at projects encouraging social harmony and improving the environment in neighbourhoods that are shared by students and residents. Community groups, students, residents and local agencies can request funding from the Community Chest, if they have a project in mind which will improve the quality of life and help to reduce crime and anti-social behaviour in areas where students and families live side-by-side.

24 Hour Neighbourhood Helpline

17. The UoN operate a 24 hour neighbourhood helpline for local residents who have any concerns relating to the activities or behaviour of students attending the University.

Funding and Cost

18. This is a voicemail service which is part of the remit of the Off Campus Manager, and is as such not allocated any particular funding. Funding is allocated to market the service (equivalent to around £3,500) annually (for the production of cards, banners, pens and other marketing items).
19. The service is publicised widely, in community newsletter, local press and within university publications. In the past, the Off Campus Manager has appeared on local news programmes and local radio to inform the community of the service.

Impact of the service

20. The service has been a vital way in which the UoN has been able to form relationship with, and address the needs of local community groups, and residents. Each complaint is responded to, and the necessary action taken wherever possible. Residents and community groups see the 24-hour service as a key route into the University and a way of voicing their concerns.

Plans to grow the service?

21. There are currently no plans to grow the service – it appears to be working effectively, and problems are being addressed. There is however plans to market the service more widely to ensure that residents and community groups are aware of the service.

Issues

22. Two key issues have emerged in relation to the 24-hour helpline:
 - The help-line and the UoN response is not a substitute to the Police. Some matters are reported to the University when they are clearly Police matters. The University is careful not to get involved in issues beyond their remit.
 - People often want an immediate response. As the service is voicemail (and is publicised as such) this cannot occur leading to frustrations.

Housing of Multiple Occupation Action Zones

23. The Houses in Multiple Occupation (HMO) Action Zones have been formed to help achieve the fundamental change which is necessary to help transform Nottingham's neighbourhoods. Due to a change in the definition of what constitutes an HMO, the number of HMOs in the City has increased substantially. Three new teams have been formed to concentrate their efforts and attention on three specific parts of the City where there is a high concentration of HMOs. These include:
- Lenton Drives area of Lenton,
 - Sneinton Hermitage area of Sneinton and
 - Burns Street area of the Arboretum.
24. The teams are located in offices near the zones, so we can be more proactive in dealing with issues and respond more quickly to requests for our service. The city wide team, based at Lawrence House continue to cover the rest of the city. Each of the three teams comprises of:
- two Environmental Health Officers,
 - two Enforcement Officers, and
 - one Licensing Support Officer.
25. Nottingham City Council is committed to transforming it's neighbourhoods working with a range of partners including:
- landlords,
 - managing agents,
 - police,
 - fire and rescue service,
 - residents,
 - community groups and
 - other council departments.
26. The HMO Action Zones will endeavour to raise the profile of the HMO licensing regime within the Housing Act 2004, ensuring that all licensable HMOs are licensed. We will also be concentrating our efforts on proactively working in the area to tackle poor housing standards and environmental issues.
27. To date Nottingham has been proactive in working with landlords and agents to prepare them for the introduction of licensing. Despite these efforts the response from landlords and agents has been disappointing. However, we have been walking the streets of the action zones and have identified a large number of properties which have not applied for a licence. The majority of these have now submitted a licence; however, where landlords fail to work with us and not license their HMO prosecutions will be sought. We want to ensure that bad landlords are not given an unfair advantage over good landlords who comply with the relevant legislation. We want to work with and engage with landlords to improve housing conditions.

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28. Mandatory licensing of HMOs only applies to properties of three storeys or more having five or more occupiers. It is anticipated that some owners may well reduce the number of occupiers to avoid having to licence their properties. It is proposed therefore that once we can show that we are making considerable progress with mandatory licensing, an application will be made to the Secretary of State for "additional licensing" which if approved will enable the Council to require all other HMOs, irrespective of size, to be licensed.
29. The action zones have a number of objectives which include:
- All licensable HMO's in the zone to be licensed
 - HMO's to be improved to appropriate standard
 - Build confidence of good landlords
 - Removal of bad landlords
 - Improve environmental conditions in the area
30. The Council has also identified other areas of concern to the people that live in the action zone areas. These issues include the displaying of To Let boards and bins being left out on streets. The Council takes formal action against wheelie bins being left out on the street 8
31. hours after the collection day. Failure to comply with this requirement will result in a statutory notice being issued to each person living in the property and if the notice is not complied with it will result in a Fixed Penalty Notice for £100 being issued to each individual in the house.
32. By improving the visual appearance of the area the Council hopes to create a safer neighbourhood. By improving housing standards we want to give confidence to tenants that the house they are living in is of a good standard and is well managed.

Loughborough University

Supplementary Planning Document - Student Housing Provision in Loughborough – The Threshold Approach

1. The Threshold Approach is founded upon an assessment of the proportion of households within the “neighbourhood” surrounding an application as informed by information gathered from Council Tax records. Subject to the outcome of that assessment, one of three different policy sets will be applied to assist the determination of the application.

Defining the “Neighbourhood”

2. The process through which the “neighbourhood” is defined is:
 - Identification of the Small Output Area in which the subject property is located – termed “Home Output Area”
 - The cluster to make the “neighbourhood” is then defined as the Home Output Area plus all other Small Output Areas sharing a boundary with that area.

Council Tax Data

3. Having defined the Small Output Area Cluster, the Council Tax Service advises on the total number of households registered within that area and the number of households benefiting from Class N exemptions and discounts on the ground of all but one occupant being students.

Using the data

4. From the Council Tax data, the number of student households will be extracted as a percentage of all household within the Small Output Area Cluster.
5. Due to HMO licensing laws, a dwelling may be occupied by up to six people without the need for planning permission. Using this average, for a hall of residence providing 120 bed spaces, this would represent 20 additional households to the area and this is also factored into the calculations.

Thresholds

6. Using this data, three broad bands corresponding to thresholds identified in the consultation process are used:
 1. Where the proportion of household in student accommodation exceeds 20%
 2. Where the proportion of households in student occupation falls between 10 and 20%
 3. Where the proportion of households in student occupation falls beneath 10%

Policy Matrix

7. Using this approach enables Charnwood Borough Council to direct policies of different weight to different neighbourhoods proportionate to the level of student occupation using the following policy matrix:

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Threshold Categories (% student households [Weighted])	A >20%	B 10%-20%	C <10%
A. Planning permission will not be granted for the development of purpose built student housing and extensions to existing student halls and flats *	✓		
B. Planning permission will not be granted for the development of purpose built student housing and extensions to existing student halls and flats where that development would give rise to excessive noise or disturbance to neighbourhood dwellings	✓	✓	✓
C. Planning permission will not be granted for the conversion of Class C3 dwellings and other buildings to provide Large Unmanaged Residences for Students (LURS) housing more than six people living together as a single household.*	✓	✓	
D. Planning permission will not be granted for extensions to Class C3 dwellings where there is evidence of the property being occupied, or intended for occupation, by students and where the development proposed would provide additional habitable rooms for occupation by students. (where there is no evidence of existing or intended student occupation and the proposed extension is otherwise acceptable, conditions will be attached to preclude its occupation by student.)*	✓		
E. In approving the development of new houses and flats the Council will impose conditions or seek a Section 106 agreement to prevent their uncontrolled occupation by students.*	✓		
F. Adoption of a Planning Enforcement regime in partnership with building Control and local communities to ensure permitted development complies with the provisions of the General Permitted Development Order and to ensure that landlord and developers are aware of national and local policies before commencing operations on site.	✓	✓	
* excluding University/College Campus and the Town Centre with adjoining opportunity sites			

8. The University are working closely with the borough Council to ensure that plans for student accommodation are clearly communicated and procedures put in place to deal with any increase/decrease in numbers.

9. Currently building a number of new halls on campus to try and reduce the numbers going out into the community

24 hour helpline

10. The 24 hour hotline is operated and core funded by Loughborough University Security team. The helpline is answered 24-hours a day by members of the security team and is used by residents to report noise incidents etc. This is supplemented by a security patrol in key student residential areas.

11. The security team have access to a student "database" to check if the property reported is registered to a student at the University (based on term time addresses provided by students at registration).

12. The University have had a good response to the service by residents. From January-June 2008, around 300 complaints were successfully dealt with. The service is promoted within resident's group newsletters and meetings and through various media campaigns.

13. The helpline is not a substitute to the Police, and the University work actively with them in order to reduce cross-over.

14. The service has been altered slightly to reflect changing behavioural patterns of students e.g. extending patrol hours to 10pm-4am to reflect new licensing laws. The University has also

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actively worked with security team members on their customer service skills to improve the service.

Community Relations Officer

- Acts as a bridging point between University and all key Stakeholders e.g. Borough Council, local residents etc.
- Keep everybody informed about developments and conduct consultations on current activities

Community Warden Role

- 3 community wardens – operate like a traditional hall warden in dense student areas
- Handle issues of welfare and discipline
- Complaints from residents
- Have had positive response from local residents

Disciplinary Policy

- Written in the University Ordinance that students cannot “bring the University into disrepute”
- This has been changed to specifically apply off-campus as well as on-campus
- When students come to the University, they have to agree to abide by the Ordinance
- The University gets involved and has the powers to discipline for major and minor offences. Clearly when these are criminal, the Police are also involved.
- Have had incidences where students have been made to undertake Community Service roles in response to behaviour problems

Off Campus Delivery Strategy

- Key Contact: Jonathan Hale (Charnwood Borough Council) (has provided a copy of the strategy)
- The strategy sets out the joined-up approach to dealing with students in Loughborough – this includes activities of the University, BC, Police, Environmental Health, Community teams etc.
- Has helped to ensure that at key times of the year e.g. Sept and June that there are the adequate resources in place to deal with students coming and leaving Loughborough.
- Has also helped to ensure a year-round approach to managing students issues.



Appendix C – List of consultees

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Manchester City Council

- South Manchester Regeneration
- Planning
- Regeneration
- Private Sector Housing
- New East Manchester
- North Manchester Regeneration
- City South
- City Centre Team
- Ward Coordination Officers
- Education
- Licensing
- Environmental Health
- Neighbourhood Services
- Community Safety

Universities

- University of Manchester
- Manchester Metropolitan University
- University of Salford
- Nottingham University
- Loughborough University
- Leeds University

Other Stakeholders

- Greater Manchester Police
- Manchester Metropolitan University Students' Union
- University of Manchester Students' Union

Housing Providers and Agents

- Opal

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- Unite
- Manchester Student Homes
- Around Town Flats
- Tiger Property Partners

Residents/Community Groups

- Withington Civic Society
- South East Fallowfield Residents' Association
- Old Moat Residents' Association
- Landlords' Forum



Appendix D – Off-Campus Manager Job Description

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The University of Nottingham

RECRUITMENT ROLE PROFILE FORM

JOB TITLE : **MANAGER – OFF-CAMPUS STUDENT AFFAIRS**

SALARY:

SCHOOL/DEPARTMENT:

The Purpose of the New Role:

To co-ordinate “off-campus” student matters on behalf of the University of Nottingham (UoN) and to advise students on responsible relations with local communities. To liaise with appropriate community groups and their representatives, and with appropriate external agencies, with a view to maintaining positive relationships between student and non-student residents in areas close to the University’s campuses in the Nottingham area and/or where high numbers of UoN students live in the community.

To be the key University representative regarding “off-campus” student affairs representing the University at all appropriate local resident group meetings. To identify issues which may affect University/Resident relations and to mediate between students and residents as necessary.

Main Responsibilities:

Please detail the main responsibilities of the new role in order of importance (if you feel several things are of equal importance, state that on the form). Please also indicate the approximate percentage of the overall working time likely to be spent on each over a period of 12 months (this will enable you to describe responsibilities, which may vary on an annual cycle).

Main Responsibilities	% time per year
-----------------------	-----------------



	i.e. What is done.... To what / for whom.... With what outcome, or result.	
1.	<p><u>Community Relations:</u></p> <p>To liase with appropriate community groups and residents' representatives together with appropriate external agencies, for example, the City Council, Police, Students' Union, Off Campus Students' Association, Landlords' Associations in order to promote greater understanding of "off-campus" issues and to develop appropriate solutions – e.g. a University Student Housing Strategy document.</p> <p>To be the University contact in regard to student support issues relating to operators of contracted "off-campus" Halls of Residence – egg Derwent Housing Association for Raleigh Park, University Partnership Programme for Broadgate Park and UNITE for St Peter's Court.</p> <p>To be the University contact in regard to student support issues relating to Whitegates Residential Lettings in the context of their services to students of the University.</p> <p>To be the University representative in regard to any and all "off-campus" initiatives such as the recent and ongoing Student Study and the Workgroups that originated from the study and to liaise with appropriate on-campus bodies.</p> <p>Working closely with the University's Director of Public Affairs to develop strategies for ensuring effective liaison and co-operation between the stakeholders and for enhancing the University's standing as a responsible institution in the community context.</p>	50%



2.	<p><u>Welfare and Promoting Good Behaviour:</u></p> <p>To liaise with University student support services for the benefit of those students living "off-campus", in association with the Students' Union.</p> <p>To be available to students in the area who may have problems and to refer them to appropriate student support services at the University and other relevant agencies e.g. police, local authority offices etc.</p> <p>To communicate with UoN students living off campus and to advise them on the importance of good behaviour in the community and how to be a responsible and courteous neighbour.</p>	25%
3.	<p><u>Mediation and Discouraging Inappropriate Behaviour:</u></p> <p>To provide a single point of contact so that all residents in the immediate vicinity of the University – students and non-students - will know how to (and be able to) contact the University in order to offer assistance or to lodge a complaint.</p> <p>To act as mediator in disputes between students and non-students.</p> <p>To counsel and advise student residents, providing guidance as to how considerate and courteous behaviour can be of benefit to everyone.</p>	25%



Knowledge, Skills, Qualifications & Experience

	Essential	Desirable
Knowledge/Skills/Training	<ul style="list-style-type: none"> • Team working • Good communication skills 	<ul style="list-style-type: none"> • Universities and student issues • Law re social & housing issues • Law relating to HiMOs
Experience	<ul style="list-style-type: none"> • Social/housing issues • Conflict management • a proven track record of relevant work experience (7 to 10 years minimum) working in difficult community situations and collaborating with other agencies to develop joint direction and outcomes. 	
Other	<ul style="list-style-type: none"> • Strong interpersonal skills • Good negotiation skills • Good influencing skills • Ability to be patient 	

6.7.4.1.1 Decision Making

Please provide examples of the nature of the role and the sorts of day-to-day decisions that will be:

i) taken independently by the role holder;

All day to day operational decisions and relevant decisions made on behalf of the University at the various stakeholder meetings.

ii) taken in collaboration with others;

Development of relevant strategy and policy proposals

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iii) referred to the appropriate line manager by the role holder.

Approval of relevant strategy and policy proposals

Politically sensitive issues

Scope of the Role

Please outline the impact the role has on the work of the team/ project/work area etc. Please outline how the role fits in with the organisational structure of the unit and the contribution it makes to the identified goals and objectives of the Team/Division/Department/School.

This new post is designed to improve harmony amongst off campus residents (approx 15000 students plus non-student residents) because at present this is a very high profile subject requiring a careful and sensitive approach in order to improve community relations in the medium to long term.