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**Leeds: assessment of the
student housing market
2023**

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EXECUTIVE SUMMARY

Purpose

The purpose of this assessment is to investigate and chart the state of the student housing market in Leeds in the academic year 2022/23. It identifies change over time, in particular against the landscape in 2018/19 and the findings of an earlier, similar research exercise undertaken in 2012. The report also sets out available intelligence on how the local student housing market is likely to evolve over a five-year planning horizon, as part of an attempt to assess the likelihood of any future accommodation shortages.

Integral to the research is an analysis of how student housing affects, and is affected by, the wider private rental market in Leeds, specifically in relation to competing demand for shared houses from other renter groups in the areas of the city with historically high student concentrations. Finally, the report sets out a number of recommended measures, targeted at specific stakeholder types, to relieve pressures in the student and wider rental market; to help harmonise supply and demand; and to mitigate the risk of critical shortages.

The research was commissioned by Leeds City Council, with the backing of the University of Leeds and Leeds Beckett University, to provide an evidence-based frame of reference to support stakeholders – individually and collectively – in their policymaking and planning activities.

Methodology

Data used for this research were drawn from a number of primary sources, described in Appendix 1. Analysis outputs from these distinct data sets are consistent and mutually corroborative: there is strong triangulation in the findings.

The context for student housing

National

Nationally, the student housing market needs to be located within the context of:

- strong increases in full-time student numbers over an extended timeline
- changing student population profiles at institutional level, increasingly shaped by the financial imperatives facing higher education providers. Confronted by a continuing government freeze on home tuition fee levels and a consequent declining unit of resource, many institutions have been seeking to maximise recruitment of higher-fee-paying international students (who all need housing)
- diversification of international student recruiting grounds, which means more overseas students (typically from India and Nigeria) with less to spend on their housing than the student accommodation sector has become accustomed to
- the legacy of pandemic-related disruption to student recruitment and admissions
- a weak development pipeline for purpose-built student accommodation (PBSA), stalled by high building costs and unfavourable conditions in the investment markets
- rapidly rising PBSA rents, particularly in host towns/cities with significant undersupply
- rapidly rising rents in the private rented sector (in particular, for these purposes, off-street shared houses), driven by:
 - increasing demand from other renter groups, largely as a result of fewer younger people being able to get on the property ladder, thanks to unusually stringent borrowing criteria and persistently high average house prices in relation to average income levels
 - the increasing unaffordability of self-contained rental properties, which are in short supply

- continuing uncertainty created by draft housing legislation. If enacted in its current form, the Renters (Reform) Bill will cause fundamental disruption to the business model used by student landlords to the extent that substantial numbers may exit the sector
- heightened fire safety and environmental regulation in the residential property industry, adding costs likely to be passed on to the renter
- strong fiscal headwinds for landlords, threatening their margins and putting further pressure on rent levels.

These factors are converging to create considerable turmoil in the UK's student housing sector.

Leeds

The population profile of Inner-North-West Leeds (Census records)

The 2021 Census recorded some significant shifts in the demography of Inner North-West Leeds (INWL) – the area where students have traditionally lived in the city. Its population increased by 13,722 between 2011 and 2021, from 88,340 to 102,112. This represents growth of 15.5 per cent over the period – twice the Leeds average – and confirms INWL as a high-demand area. At 51 per cent, levels of households renting privately in INWL rose by three percentage points across the timeline, and were 2.5 times the city average of 22 per cent. Conversely, levels of home ownership in the area were significantly lower than the city average.

In 2021, the INWL population comprised:

- 45.6 per cent students (-2.5 percentage points on 2011)
- 37.1 per cent people in work (-0.6 percentage points on 2011)
- 17.3 per cent people who were unemployed or economically inactive for other reasons (+3.2 percentage points)

The number of 16-35-year-olds in work increased across all parts of INWL and by just over 6,700 overall.

Within INWL, between 2011 and 2021, student numbers:

- in the city centre rose by 4,922
- close to the city centre (the university area, Hyde Park, Woodhouse and South Headingley) increased by 3,301
- in central Headingley/Cardigan Triangle grew by 167
- in the outer parts of the area fell by 4,272.

These statistical findings indicate that, over the 2011-21 period:

- demand for rented housing in INWL increased among young working households unable to access or afford other housing options, so that they accounted for a growing proportion of private renters across the traditional student heartlands of INWL in 2021
- INWL became a starter market for young households – made up of students; graduates and other young people in their first or second jobs; and young couples
- the shared housing market became a means to meet the housing needs of younger households
- the city centre, the University area, Hyde Park, Woodhouse and South Headingley became stronger centres of gravity for students
- growing numbers of other, mainly young working, renters displaced students from the more outlying parts of INWL.

House prices

Analysis of market data available online shows that house prices in INWL rose by 70 per cent between 2012 and 2023, compared to the Leeds average of 66 per cent. This is an indicator of strong demand and is an important driver of high rent levels in the area.

Local planning regulation

Leeds City Council has taken advantage of available powers to restrict the scope of permitted development rights in designated areas for particular purposes, known as Article 4 Directions. Specifically, the local authority has, under these powers, imposed a bar on additional Houses in Multiple Occupation (HMOs) in prescribed areas in Inner North-West Leeds in order to prevent excessive imbalances in the population of residential communities. This has been an effective planning instrument to preventing conversion of more HMOs into shared houses for students within the designated areas (although there is evidence from student address data analysis of 3,253 more students living in the Hyde Park, University and Central Headingley areas, indicating a significant level of student-led over-occupancy).

Student demand and PBSA supply

Between 2014/15 and 2022/23, citywide full-time student numbers grew by 9,522, up from 50,491 to 60,013 (+18.9 per cent). Available information on student number planning indicates future growth of 4,061 between 2022/23 and 2027/28 (+6.8 per cent).

Also between 2014/15 and 2022/23, PBSA bed space numbers in Leeds rose by 5,030, up from 18,084 to 23,114 (+27.8 per cent) – therefore at a rate higher than for student numbers. Between 2022/23 and 2027/28 a further 2,462 additional bed spaces are anticipated to come into commission – concentrated in summers 2023 and 2024. Although the known pipeline for Leeds extends to 8,278 new bed spaces between 2024/25 and 2027/28, in reality a virtual standstill in new provision is expected for summers 2025 and 2026 at least, because of unfavourable conditions in the investment sector and building industry. On the face of it, therefore, projected ratios for the student demand pool and PBSA stock are not out of kilter with historical values. However, this is not just a matter of slotting generic students into generic bed spaces. The market has become highly segmented.

Segmentation of the market

Demand is becoming highly stratified, as full-time student populations change and diversify:

- in 2018/19 UK undergraduates accounted for 70.5 per cent of the citywide full-time student population. For 2027/28, this figure is projected to shrink to 60.5 per cent
- conversely, in 2014/15, overseas student numbers made up 22.1 per cent of the population. By 2027/28, this proportion is expected to rise to 31.6 per cent
- Because international students have a residential need approaching 100 per cent and home students a significantly lower proportion, demand will rise on top of the extra demand from extra overall numbers
- Between 2018/19 and 2022/23:
 - in the core taught postgraduate and undergraduate recruitment streams, the population of Chinese students at the University of Leeds grew by 39 per cent (+1,403), but Indian students at the same levels of study went up by 748 per cent (+1,578)
 - the population of taught postgraduates from India at Leeds Beckett University rose from 100 to 1,709 and from Nigeria from 17 to 677
- It has long been understood in the higher education sector that students from emerging overseas markets such as India and Nigeria cannot afford expensive PBSA in the way that many Chinese students can.

Supply of PBSA has evolved to take account of a high volume of international students, but has focussed strongly on high-end, high-cost products to suit student preferences and budgets within this segment. Nearly half (49 per cent) of PBSA in Leeds is provision owned by the private sector and let directly to students. Of this, over a quarter (28 per cent) is configured as studio flats, which are generally a premium product at a premium price. A significant proportion of the ensuite provision in the direct-let sector is also high-specification and high-cost.

Along with more flux in student preferences for PBSA and off-street housing, this complexity in the composition of student populations, accommodation types and rent levels makes for a difficult fit between supply and demand.

Off-street private rented housing: there are some 20,271 private rented properties in Inner North-West Leeds and Leeds city centre and 75,193 private rented properties in areas outside Inner North-West Leeds and the city centre.

There are around 56,750 bed spaces available to students in Inner North-West Leeds and the city centre, and 137,000 bed spaces available in private rented properties in other parts of Leeds.

Analysis of student address data indicates 22,383 full-time students living in off-street private rented accommodation in Leeds. On the surface, this may indicate sufficient supply in the private rented sector to meet student demand. However, demand for private rented housing is increasing substantially from younger households in work, and to a lesser extent from benefit claimants and asylum seekers and refugees. Furthermore, private rented housing in many areas outside Inner North-West Leeds is likely to be unattractive to students.

Given the restrictions imposed by the Article 4 Direction under Policy H6 of the Leeds Local Plan, it is unlikely that any additional supply of HMO accommodation will materialise, although there are indications of at least some new build-to-rent housing in and around the city centre.

Universities cannot comfortably rely on the private rented market to absorb student demand, if PBSA volume falls short of demand from new students, international students and returning students wanting to remain in or re-enter PBSA. Additionally, a constrained supply of PBSA may lead to narrowing options for students.

It is looking likely that rental reform legislation will change the traditional letting year. For a proportion of students the reality of their position may be a straight choice between higher-specification direct-let PBSA that they will struggle to afford and a much-reduced stock of off-street housing. Returning undergraduates moving out of PBSA into the off-street market may find it significantly more difficult to find housing.

Rents

Overall, on average, a direct-let in the private PBSA sector is getting on for two fifths more expensive than in an institutional portfolio. (This finding is strongly skewed by the high volume of studios in the direct-let sector.) For ensuite provision, on average, direct-let provision is 7.9 per cent more expensive than for the University of Leeds and 5.4 per cent more than for Leeds Beckett University.

Rents in Inner North-West Leeds have increased by significantly more than for the city as a whole. Average rents rose from £489 per month in 2012 to £1,107 in 2023 (+127 per cent). Rents for rooms in shared houses were higher than the city average in all parts of INWL.

Average rent for PBSA direct-lets was £1,646 more expensive in 2023/24 than for bills-inclusive rent in the off-street sector (+25.1 per cent). If the off-street sector shrinks, this price differential will become particularly important, as returning undergraduates weigh their two main options and their affordability.

Rents for rooms in shared houses increased by 74 per cent from £279 per month (or £3,348 per year) in 2012 to £486 (or £5,832 per year) in 2023.

The average bills-inclusive rent for a room in a shared house is currently £6,552 per year, up £3,180 from £3,372 in 2011/12 (+94 per cent) The comparable figures for a room in direct-let standard PBSA are £4,535 in 2011/12, rising to £5,597 in 2023/24 (+23 per cent); and for directly-let ensuite PBSA, £5,633 in 2011/12 up to £8,368 in 2023/24 (+49 per cent).

In 2011/12 the average rent for a directly-let ensuite room in PBSA was £2,261 more expensive than for a room in a shared house (+67 per cent). By contrast, in 2023/24, the proportional gap has narrowed significantly to 28 per cent (+£1,816).

Where students have been living

Student address data for 2018/19 and 2022/23 (plus parallel data from the 2012 exercise) provided the basis for analysis of the distribution of full-time students across accommodation types and locations in the city.

In 2022/23, almost two-thirds of new undergraduates were living in accommodation allocated by the universities. This finding is significant, when considered in the historical context of much higher proportions of Year 1 undergraduates being channelled into institutional portfolios. The remaining third found somewhere to live in direct-let PBSA or in the private rented sector, or they decided to study from their parental home. It is a moot point whether students eligible to apply for university-allocated PBSA but deciding to live elsewhere made a genuine choice or were unable to access or afford institutional options on offer.

The number of returning undergraduates living in PBSA has increased. Although proportionally down, sustained numerical demand from Year 1 undergraduates and growth in international postgraduates mean returning students are being squeezed out to maintain institutional guarantees to new students.

Postgraduates are living in a mix of settings. Growing numbers are opting to live in PBSA. However, for a proportion of them, PBSA rents are likely to be prohibitively expensive. So too may be the price tags attached to city centre living and off-street renting. With narrower options available to them, it is likely that some postgraduates are looking to rent in cheaper and lower-quality housing, often outside the student market or Leeds.

Almost two-thirds of students were living in university or private PBSA in 2022/23. Just eight per cent were Chinese. However, nearly half (46 per cent) of students living in directly-let PBSA were Chinese, compared to a figure of 22 per cent for UK students.

The proportion of international students living in direct-let PBSA was almost eight times higher than for UK students. The proportions of international students and UK students living in university/private PBSA were similar. International students had either limited choice in accessing cheaper institutional PBSA options or a preference for the amenities offered by, and an ability to meet the costs of, direct-let PBSA.

Overall, the proportion of UK students living in private rented housing was 2.5 times higher than for international students, but the proportion of international students living in city centre private rented housing was five times higher than for UK students. This suggests the continuing appeal of off-street private rented housing for UK returning students and perhaps a greater preference among many international students to live in the city centre or close to campus.

Indian and Nigerian students were far less likely to be living in PBSA than were Chinese students. Cost is inferred to be a critical factor in these contrasting findings.

Together with insights given by landlords/agents as part of this research, data on changing market conditions indicate increasing demand for shared rented accommodation from young working people unable to access or afford other forms of housing. If this trend continues, students will be in competition for the best properties. With static supply, they may not be able to secure the properties they want. This could mean more students considering PBSA as an option or studying from their parental home.

Students are increasingly gravitating towards the city centre and the areas closest to the city centre university campuses. They have consolidated in the traditional student heartland of Hyde Park. Within Inner North-West Leeds, students have been gradually moving out of areas which are furthest from campus and which historically have been dominated by residential family households. These findings are consistent with Census data analysis.

There is a strong and growing preference among students to live within a 15-minute walk of the city centre/their place of study. Cost-of-living considerations play a part in shaping this preference. But it remains unclear just how far the urban/campus clustering of where students live is demand- or supply-led.

There is a mix of new undergraduates, returning undergraduates and postgraduates living in the city centre. This runs counter to perceptions that city centre PBSA is the near-exclusive preserve of affluent international postgraduates.

Analysis of the occupation of private rented housing across Inner North-West Leeds indicates that Central Headingley, Woodhouse, Burley and Kirkstall have become focal points and dual markets for young households.

Conclusions

Short term: 2023/24 – 2024/25

It is likely that, on a straightforward numerical calculation, there will be enough PBSA and off-street shared housing to meet demand. Early informal reports suggest that institutions in Leeds are short of their aggregate target (+2,300) for 2023/24. A further 1,337 beds are due to enter the market in 2023/24, with a further 1,125 expected to come into commission in Leeds for 2024/25. PBSA volume appears to be adequate to meet rising demand in the short term. Off-street housing supply is static, but likely to meet demand. Students may though find it increasingly difficult to secure shared housing that suits their needs.

Although there may be adequate supply *numerically*, there are warning signs that some stock does not meet the needs, budgets and preferences of students, and that provision which is a good fit for them may become more difficult to secure:

- In INWL, there is growing competition from young workers for the finite and capped volume of off-street shared housing
- The supply of moderately priced PBSA is limited, as most recent and planned new-build is configured as higher-cost ensuite and studio provision
- Almost a third of Year 1 undergraduates are now not accommodated in the PBSA offered them by their institutions, suggesting that it does not meet their requirements
- Proportionally, more returning undergraduates are living in PBSA. This represents a material erosion of the historical paradigm of returners opting for shared off-street housing
- Some international students are finding informal accommodation solutions because they cannot afford the mainstream options

- In 2022/23 more students were living in parts of INWL, in spite of the Article 4 bar on increasing HMO stock in these areas. This strongly suggests significant excess occupancy.

The medium to long term (2025 onwards)

Citywide student numbers are projected to rise steadily to 2027/28 (+1,754). The market is becoming highly segmented, so that meeting student demand is decreasingly about slotting generic students into generic bed spaces. New PBSA provision coming into commission before 2026/27 is expected to be low in volume.

The rent gap between PBSA and off-street shared housing is set to continue to narrow and may lead returning undergraduates to view university-allocated PBSA as a more attractive option (although bed spaces earmarked by institutions for this segment are currently low).

Changes in legislation through the Renters (Reform) Bill will reduce the availability of off-street housing for students at points of peak demand in the academic cycle. Smaller properties in particular will be lost to other tenant cohorts.

There is likely to be increasing competitive demand pressure for off-street shared housing from young working households. This may fuel further rent rises, as demand outstrips supply. There is already some evidence of gazumping in the market.

It is possible that some off-street stock may exit the market, as some landlords sell. At the same time, Article 4 Directions make any additional supply of HMOs unlikely.

These conditions and prospects imply that:

- the increasing segmentation of the student housing market. The trend towards reducing numbers of domestic undergraduates and increasing numbers of international students will raise issues for the capacity of the existing supply of accommodation to meet demand.
- The increasing flux in student preferences for PBSA and off-street housing, and the complexity in the composition of student populations, accommodation types and rent levels will lead to a difficult fit between supply and demand
- Demand for PBSA at an affordable cost or mid-price point is likely to grow and on current trends is unlikely to be met by adequate supply. With the rent gap narrowing between PBSA and off-street shared housing, there may be more demand for moderately priced PBSA from returning undergraduates
- Further new high-cost PBSA may not meet the demand profile of new students. This potential mismatch may result in localised voids as student populations change. This is likely to reflect poorly targeted development in need of a demand-led change of focus.
- A preponderance of higher-cost PBSA may pose difficulties for domestic students with low to average incomes and international students on restricted budgets. Budget pressures are likely to extend the need for more part-time work and parental contributions
- High rents may mean more students studying from home. They may also deter some people from entering higher education
- Universities may no longer be safe in their reliance on the private rented market to absorb growing student demand, if PBSA volume falls short
- A combination of increasing competition and an earlier letting cycle could mean students facing more limited housing options (further away/poorer quality) and increasing difficulties in finding off-street shared housing that meets their needs and preferences.

A INTRODUCTION

A1 The research exercise: its commissioning, purpose and content

The Leeds Student Housing Working Group is a multi-agency body set up to share information, analysis and insights about the state of the student housing market in the city. It includes representation from Leeds City Council, the University of Leeds, Leeds Beckett University, Leeds Trinity University, Unipol Student Homes, local students' unions and Leeds Property Association.

The Group is convened from time to time to commission and oversee a research exercise whose primary purpose is to support harmonised strategic planning across major stakeholder organisations. For the local authority, the research outputs can be used to inform the Council's new Local Plan and latest Strategic Housing Market Assessment (SHMA), both currently in progress. For stakeholder universities, the report can be used as a tool for balancing student demand across all years of study against the available supply of suitable accommodation, while factoring in demand both from students at other local institutions and from non-student rental groups in the city (including young professionals, people in social housing, and families).

In mapping student housing supply and demand in Leeds, the research provides an evidence-based assessment of the size, shape, profile and distribution of the local student housing market in 2022/23. As well as documenting the types of accommodation that students occupy, the research drills into the detail of where students live geographically over time. The research is focused on the student rented sector (purpose-built and shared housing in the community), but locates this within:

- broader local housing market conditions, including property prices, the profile of residential tenure and demand from other groups for rented accommodation
- the likely future shape of the wider policy, regulatory and market context (as well as can be forecast).

Looking back, the report compares findings with relevant data for 2018/19 and with outputs from the 2012 iteration. It also tracks local demographic and market change between the 2011 and 2021 Censuses. Looking forward, it plots likely shifts in market balance to 2027/28, based on:

- available data on local universities' student number plans
- the pipeline for purpose-built student accommodation (PBSA)
- projections of current trends in the off-street private rented sector
- horizon scanning for policy and legislative developments

Although the current exercise was due in any case, its importance has been heightened by major disruption to market conditions nationally and locally in recent cycles (see Section B). This disruption owes much to the pandemic and its legacy. The urgency of making sense of what is happening and what is likely to happen next is brought into sharp relief by accommodation crises that flared in autumn 2022 in a number of university locales, potentially foreshadowing similar, more widespread shortages elsewhere.¹

This report sets out a number of conclusions and recommendations for the benefit of members of the SHWG and wider stakeholders.

A2 Methodology

The research uses an approach that combines:

- analysis of data sets supplied by stakeholders, plus publicly available information
- evaluation of insights provided by key agents at interview.

A note on the detail of the methodology is included at Appendix 1.

B THE NATIONAL LANDSCAPE

There is a wide range of determinants that shape the student housing market. The landscape in 2023 is characterised by an extraordinary mix of factors, created by some unprecedented developments. These can be summarised as: student growth; pandemic-related disruption; a weakening development pipeline; growing rents and government intervention in the private rented sector; and higher education policy – all converging to make for considerable turmoil in the student housing sector.

B1 The pandemic

For these purposes, the major impacts of the pandemic nationally were:

- to create a spike in intakes for full-time home undergraduates as a consequence of A-level grade inflation, produced by emergency changes to methods of assessment
- to inflict a significant financial blow on higher education institutions, providers of purpose-built student accommodation and many landlords
- to exert strong downward pressure on the global and UK economies.

Of these, the beyond-plan intakes incurred by popular, higher-tariff institutions – notably Russell Group members (which include the University of Leeds) – are still the most palpable legacy: the outsize 2020/21 and 2021/22 cohorts continue to feed through full-time student populations. Many of the universities affected are currently in the business of managing down their home undergraduate recruitment to correct numbers within their five-year planning horizon. (Against all predictions, international student numbers held up and have since flourished, in spite of global lockdown disruption and China's prolonged zero tolerance approach to Covid management.) Less obvious, but more insidious and enduring is the market impact of the recessionary forces accelerated by the pandemic.²

B2 The market

For these purposes, the impact of weak economic conditions nationally and globally has been:

- to create strong inflationary forces across the UK economy, producing a cost-of-living crisis and fuelling rises in construction costs
- to drive rising mortgage and other debt costs,
 - squeezing rental returns hard enough to prompt significant numbers of landlords to sell up, and to deter prospective new blood from entering the private rented sector
 - preventing would-be buyers from getting on the property ladder, and keeping many of them in the private rented sector for longer. Demand for homes to rent has continued to grow at the same time as the supply of properties to let has declined. The primary effect has been soaring rents. For properties let with utilities wrapped in, rents have been driven up further by steep rises in energy costs
- to create conditions in the financial markets that have been inimical to investment in PBSA development, reducing new supply
- to bolster already strong demand for higher education, as university study continues to serve as a haven for people weighing their options in a challenging jobs market. (There may, however, be a tipping point where the hostility of economic conditions deters significant numbers of people from applying, particularly from less well-off socio-economic groups.)

B3 Regulation and policy

B3.1 Student accommodation

There is a slew of recent and impending measures which act as a check on the volume of properties in the overall rented sector. Some are general and some are more specific to the PBSA or shared housing sector.

B3.1.1 Renters (Reform) Bill

According to the Government, the [Renters \(Reform\) Bill](#), published in May 2023, was motivated by a desire to give renters a better deal by abolishing no-fault evictions and re-writing the grounds for possession available to landlords. As part of the overhaul, there is a proposed ban on fixed-term tenancy agreements, including for the student segment of the private rented sector. (PBSA would, however, be exempt.) While providing greater flexibility for students, this ban would radically destabilise the long-standing alignment of academic and letting cycles. This would have fundamental implications for the business model used by student landlords, inevitably entailing less efficient occupancy, greater administration and higher costs. In interviews conducted for the purposes of this research, landlords confirmed this assessment and expressed the view that enactment of the Bill in its current form would push some student landlords to retire and sell up or move into other markets. For students, the ensuing market dislocation and likely shortages would add:

- considerably to the complexities of finding somewhere to live – potentially significant enough to dissuade some from the residential model of university
- to their rent bill, if they decided to live away from home, because many landlords would pass new costs on.

The Department for Levelling up, Housing & Communities (DLUHC) has received representations from HE sector bodies about how badly these changes would disrupt the student housing market and reduce affordable supply. Notwithstanding the robustness of the lobby, the most recent ministerial response made no mention of the educational impact the legislation would have in its current form. The issue remains unresolved at the time of writing. Nonetheless, there will already have been a corrosive effect on the student landlord community since the Government first trailed the possible ban more than two years ago.

B3.1.2 Other regulatory provisions

The Bill apart, there have been other significant changes to the regulatory landscape:

- The Government extended the coverage of mandatory licensing in 2018, imposing more rigorous safety and living standards on significantly more properties and smaller landlords
- Post-Grenfell, the Fire Safety Act 2021 and Building Safety Act 2022 establish major new responsibilities for residential property developers and operators – entailing additional remedial, construction, refurbishment, upgrade, maintenance and other operational costs
- Sustainability standards in the wider rented sector are intensifying:
 - minimum energy efficiency ratings for rental properties continue to be ratcheted up

- there are growing expectations that developers adopt the Building Research Establishment Environmental Assessment Method (BREEAM) for construction and refurbishment projects
- *New Smoke and Carbon Monoxide Alarm Regulations* came into force in October 2022

B3.1.3 Fiscal measures

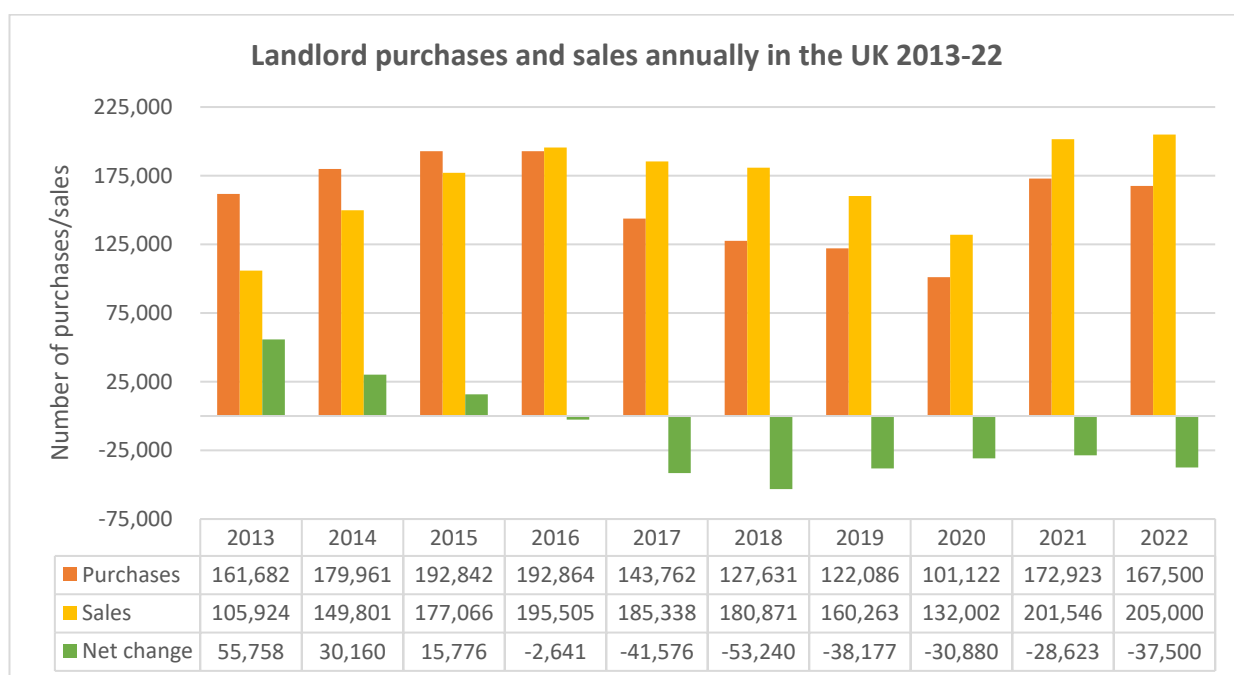
Recently implemented changes to the fiscal regime have also added pressure on the sector:

- Since 2016, buy-to-let properties have been subject to a stamp duty surcharge
- For individuals with a rental property business, relief for mortgage interest and other tax-deductible costs was phased out over three years from April 2017
- For property owners planning to sell, the capital gains tax allowance was cut in April 2023 and will be further reduced next financial year
- For landlords letting their properties via a limited company with profits of £50,000+, corporation tax rose in April 2023
- Also for landlords using limited company structures, the tax allowance on dividends was lowered and the basic and higher dividend tax rates were increased in April 2022
- For most landlords, National Insurance Class 2 contributions were raised the same year.

B3.1.4 Impact summary

Collectively, over time, these changes add significantly to the compliance burden and reduce yields for landlords working in a tougher fiscal regime. To maintain viable margins, landlords in general are passing on costs to tenants through rapidly rising rents. Among smaller landlords in particular, the extra challenges noted here have prompted many to exit the sector.³

Figure 1



Source: *Hamptons & HMRC*

Research by Propertymark, a professional body for estate and letting agents found that over half (53 per cent) of buy-to-let properties sold in March 2022 left the private rented sector.⁴ It can reasonably be concluded that the shortages of rental housing currently being widely reported in the media are linked to this reduction in supply.

B3.2 **The higher education sector**

B3.2.1 *The funding methodology and financial sustainability: implications for accommodation demand*

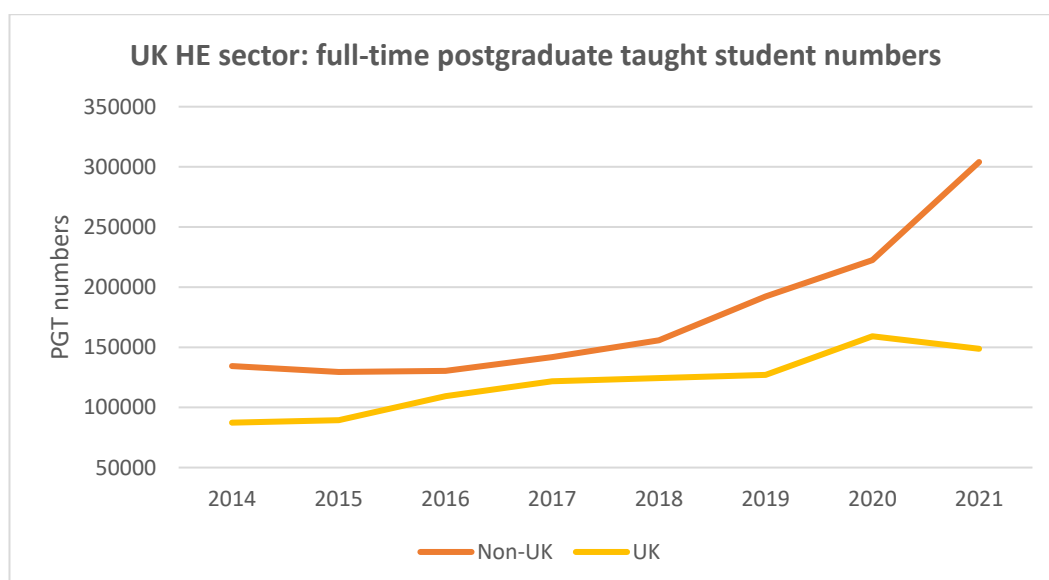
In 2012, the Government decisively shifted the cost of higher education from the public purse to the consumer by raising tuition fees from £3,225 to a maximum charge of £9,000 a year for home students. Since then, however, the cap has risen only once – in 2017 and by just £250. The Government has announced that the freeze will continue until at least 2024/25.

In June 2022, the Public Accounts Committee made a periodic report on the financial health of institutions.⁵ It says the number of universities with budget deficits rose to 80 in the 2021/22 financial year. Foremost among the adverse factors affecting institutional sustainability is the declining value of home tuition fees relative to rapidly rising inflation.⁶

B3.2.1.1 Changing student populations

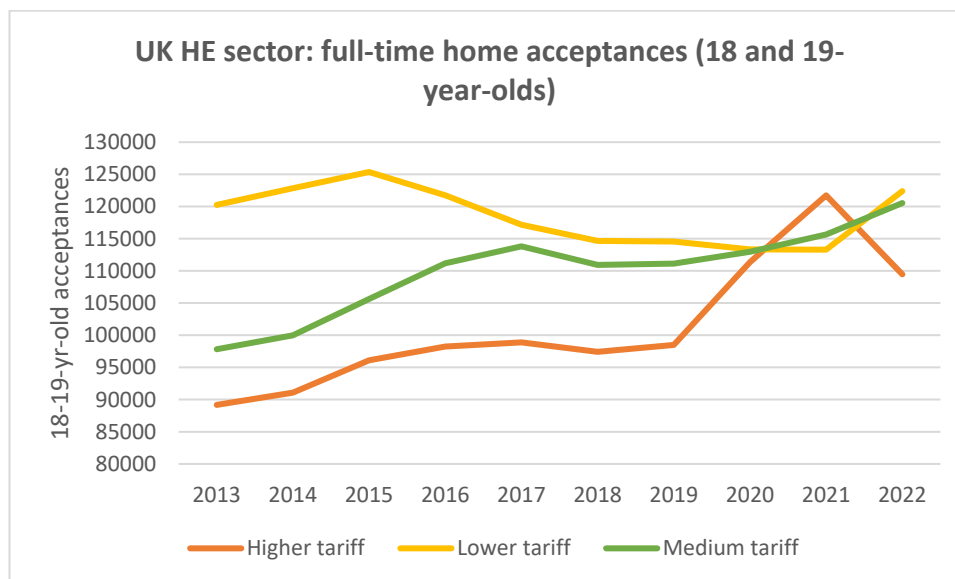
The dwindling unit of resource has been affecting the balance of full-time students being recruited by institutions. Many universities are grappling with capacity issues (staff and buildings). Most of these are so-called higher-tariff institutions, where student intakes are often governed more by admission than recruitment. Their leaders have concluded their only option for shoring up the unit of resource is to keep home intakes in check in order to provide room for higher numbers of international students, who pay substantially higher tuition fees.

Figure 2



Source: UCAS end-of-cycle data sets

Figure 3



Source: UCAS end-of-cycle data sets

Meantime, lower-tariff universities (where there is a greater focus on recruitment over admission) will generally grow where they can in order to help support financial sustainability. But if they have capacity issues, they too are likely to prioritise overseas over home students.

B3.2.1.2 Changing residential requirements

Rebalancing towards international students increases accommodation demand. Virtually all students from overseas need to find somewhere to live; a significantly lower proportion of home students have a residential need. Shifting the balance in favour of international students increases the proportion and number of full-time students who need housing. (Additionally, the international student segment contains nearly all students requiring family accommodation, which is a distinct type of provision poorly served by the student housing sector in the UK as a whole.)

The PAC has expressed concern that some universities are unduly reliant on overseas student fees to cross-subsidise research and other activities, leaving them 'potentially exposed to significant financial risks' if international student numbers fail to keep growing.⁷ In May 2023, the Office for Students (OfS) wrote to 23 institutions warning them not to be over-reliant on China as an overseas recruiting ground. This is likely to have been prompted by growing geopolitical tensions relating to China and to the country's faltering economy. Many universities are working hard to diversify their international student profile by tapping into strong demand elsewhere, particularly in India and Nigeria.

Historically, in absorbing growth in demand, PBSA providers have had a particular focus on the Chinese market. Their accommodation portfolios are often strongly patterned by specification levels tailored to the budgets of Chinese students drawn from affluent backgrounds. In broadening their international base, universities are typically admitting Indian and Nigerian students whose budgets do not stretch to higher-end private PBSA. PBSA supply that is inappropriate to changing demand is set to be an increasingly significant contributor to the tightening of the student housing market, and has been investigated as part of this research in order to establish how far this may apply to Leeds.

B3.2.2 *Immigration*

The backdrop to institutions rebalancing their student profiles is a burgeoning UK HE export market (although, at the time of writing, signs were emerging of some cooling in the international market). The bulk of the unprecedented demand is in postgraduate taught provision focussed on business administration and technical vocational qualifications that are viewed as yielding a high economic return. It is, however, in danger of becoming caught up in the Home Office's determination to cut immigration and take tighter control. It remains to be seen whether the Home Secretary goes ahead and reduces the number of international students who can apply for a graduate post-study work visa, which allows a student who has passed their degree to remain and work in the UK for two years. Such a move would be likely to deter substantial numbers of prospective overseas students from applying to study here.

On 23 May 2023, the then Home Secretary announced that international students on taught programmes of study would no longer be able to bring their families with them to the UK from January 2024. In particular, for cultural reasons, this is likely to affect recruitment figures for Indian and Nigerian students on postgraduate taught and undergraduate courses. It is uncertain at this stage whether the ban will significantly dampen admissions, as students with dependents can still bring them to the UK to complete post-study work.

B3.2.3 *Demographic changes and participation in higher education*

In September 2023, an early UCAS report on the latest autumn recruitment round indicated faltering home and international undergraduate intakes: UK acceptances down 1.8 per cent (including a drop of 2.5 per cent in acceptances for applicants from the most disadvantaged backgrounds) and non-EU acceptances down 0.9 per cent. Stalling growth in the key home markets comes despite a well-documented upturn in numbers of young adults in the UK.⁸ Coupled with widening participation, this demographic expansion has been extensively referenced in the property industry and by UCAS as a reason to invest in PBSA.⁹ It is becoming clear, however, that rising population figures are not being reflected in UK undergraduate admissions.

In 2022/23, there was no increase in home students and UK student intake was lower than in 2020. It appears that:

- the long-term growth trend in undergraduate international entrants may have ended, albeit at a higher level than pre-Covid
- home student demand is being depressed by a range of downward pressures.

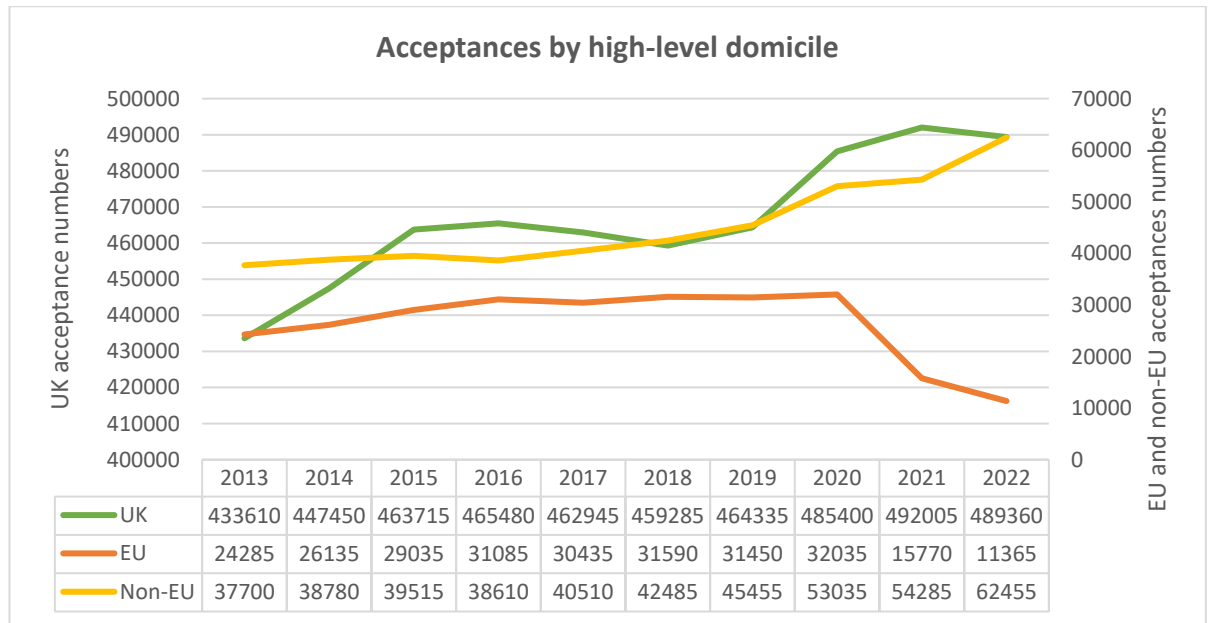
B3.2.4 *Brexit*

Post-Brexit, the Government opted not to make special regulatory arrangements to support the export market in EU member states. Students from these recruiting grounds are now:

- required to secure a visa
- subject to much higher tuition fees as part of the wider international market
- ineligible for government-subsidised loans for the payment of tuition fees.

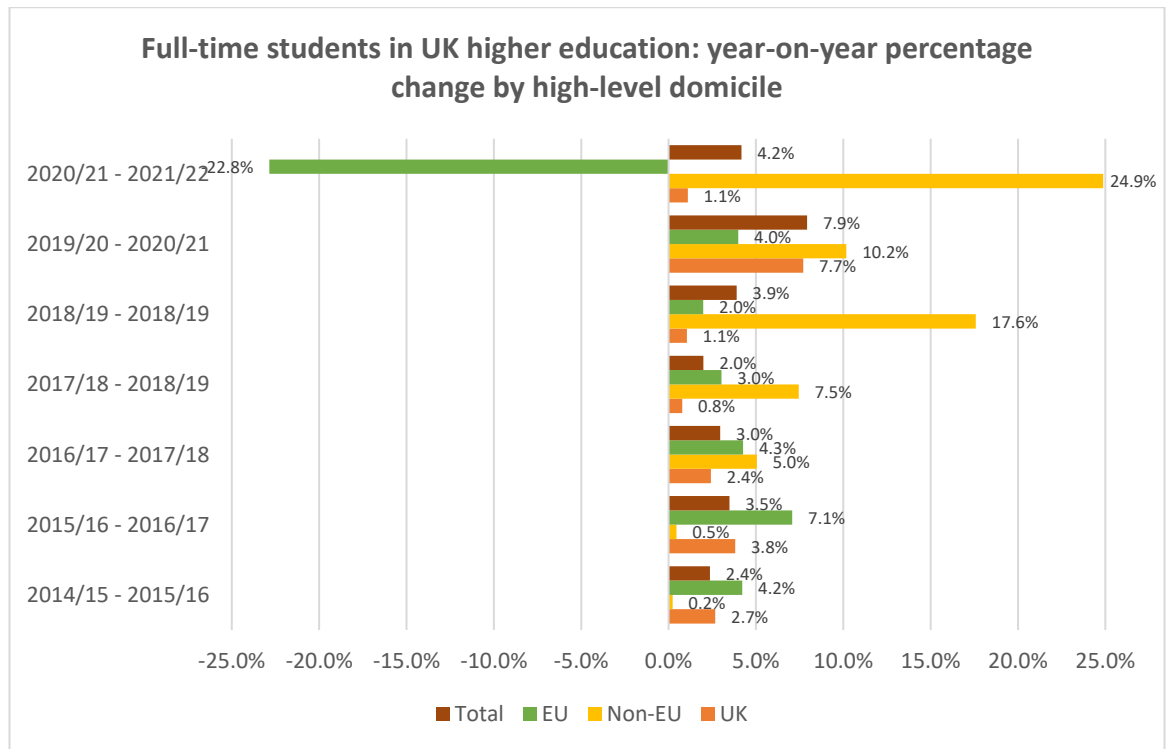
As a result, applications for undergraduate courses halved between 2020 and 2022. Application and student numbers at all levels of study are unlikely to recover and may deteriorate further, given that these new arrangements appear to be here to stay.

Figure 4



Source: UCAS end-of-cycle data

Figure 5



Source: UCAS end-of-cycle data sets

B3.2.5 Changes to student maintenance arrangements

B3.2.5.1 The declining value of student maintenance loans

In January 2023, the Government announced that student maintenance loans in England would rise by 2.8 per cent next year. The level of increase was based on forecasts (published in 2022) of 2.8 per cent inflation in March 2024, almost certainly far below the real rate. The Russell Group has calculated that the increase for 2023/24 will leave

students over £1,500 worse off than they would have been if student support had been pegged to inflation. The Department for Education itself has conceded that student support would have needed to increase by 13.7 per cent to keep up with recent rises in the cost of living. Combined with the continuing freeze on the parental earnings threshold for entitlement to the maximum grant (stuck at £25,000 since 2008), this is likely to cause growing student attrition and to affect underrepresented socio-economic groups disproportionately.

B3.2.5.2 Tougher student loan repayment terms

The Government has also announced that, in order to help lower the cost to the Treasury of England's student loan system, it is:

- extending from 30 to 40 years the period in which loan repayments must be made
- lowering the salary threshold at which money starts to be paid back to £25,000.

B3.2.5.3 Establishing a minimum qualification requirement for accessing student loans

Although finding less favour in government as of November 2023, proposals on a minimum qualification requirement to access loans to enter higher education would likely further hamper social mobility and the widening participation agenda. Under the proposals, students who fail to gain a Grade 4 GCSE pass in maths and English, or two E grades at A-level, would be blocked from accessing student loans and therefore going to university.¹⁰

These changes would likely hit lower earning graduates harder and might deter significant numbers of people from applying to go into higher education.

B3.2.6 *Capping student numbers on 'low-value' degrees*

The OfS plans to introduce new regulations to sanction providers if fewer than 80 per cent of students studying full-time for their first degree continue past their first year, or if fewer than 75 per cent complete their degree. The OfS says that more than 60,000 students on full-time undergraduate courses are currently or recently enrolled at institutions in England that could fail to meet its minimum standards. Institutions could also be investigated and penalised by the OfS if fewer than 60 per cent of their students go on to work in what it classifies as 'skilled employment'; to do further study; or to achieve similar 'positive outcomes' within 15 months of graduating. Many commentators view these plans as a move to reintroduce caps on student numbers via the backdoor. In July 2023, the Prime Minister signalled his intention to go ahead with these proposals. Subject to parliamentary scrutiny, the new measures will have effect from autumn 2024/25. The main impact will be on would-be students with fewer financial resources available to them, and on lower-tariff institutions, for which the challenges of recruitment and financial sustainability will be substantially compounded.

Taken together, these policy shifts point increasingly to a departure from the decades-long consensus across successive governments that the expansion of home graduate numbers is an economic good.¹¹ Growing scepticism about the value of higher education in Westminster and Whitehall reflects the reality that the Treasury has taken control in the debate and in the formulation of policy.

B3.2.7 *Summary and comment*

In summary, against a backdrop of growing scepticism in Government about the continuing expansion of higher education – both domestically and internationally – many providers are chasing growth in their chosen segments in order to make the most of conditions before any (further) adverse policy shifts are implemented.

There is a concern, however, that in seeking to capitalise on the currently strong international market, some providers run the risk of overselling their offer. While this tendency may produce impressive short-term results, recruitment outcomes into the medium term may tail off as satisfaction levels decline and compromise some institutional reputations. The support infrastructure of many providers is not adequate to meet the needs, demands and interests of international students in high volume.

The demographic upswing in UK 18-year-olds should be converting into higher overall intakes for this segment, but pressures on household budgets and university finances appear to be preventing this.

Overall, existing and planned regulatory obstacles to growth will disproportionately affect less well-off socio-economic groups. In stymying the widening participation agenda, these brakes on expansion hold down growth in numbers of students likely to struggle with affordability in accommodation and other aspects of student maintenance.

C LOCAL CONTEXT

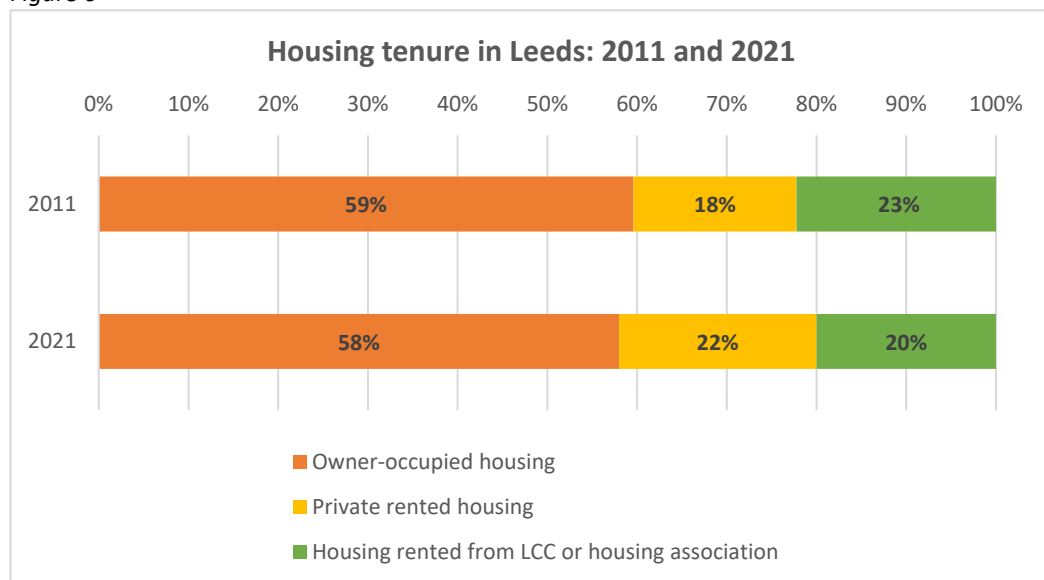
C1 Housing in Leeds: profile of tenure and occupancy

C1.1 *Citywide: general population*

Between the two most recent Censuses (2011 and 2021), the population of Leeds increased by eight per cent, from 751,485 to 811,953. The 2021 Census put the number of students aged over 18 and living in Leeds at 62,044 in 2021.¹² This represents 7.7 per cent of the city's population. By comparison, there were 59,741 students in 2011, but this smaller number accounted for a slightly larger proportion of the general population (7.9 per cent).

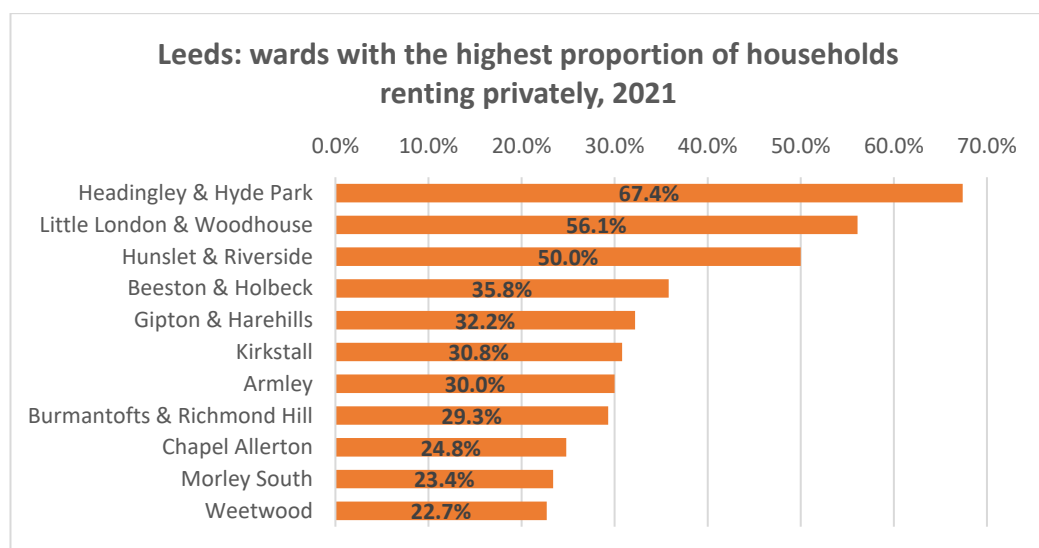
According to Census data, from 2021 and 2011 there was some movement in tenure away from owner occupation and social housing in Leeds towards the private rented sector (Figure 6).

Figure 6



Source: 2021 Census in <https://www.nomisweb.co.uk/>, May 2023

Figure 7



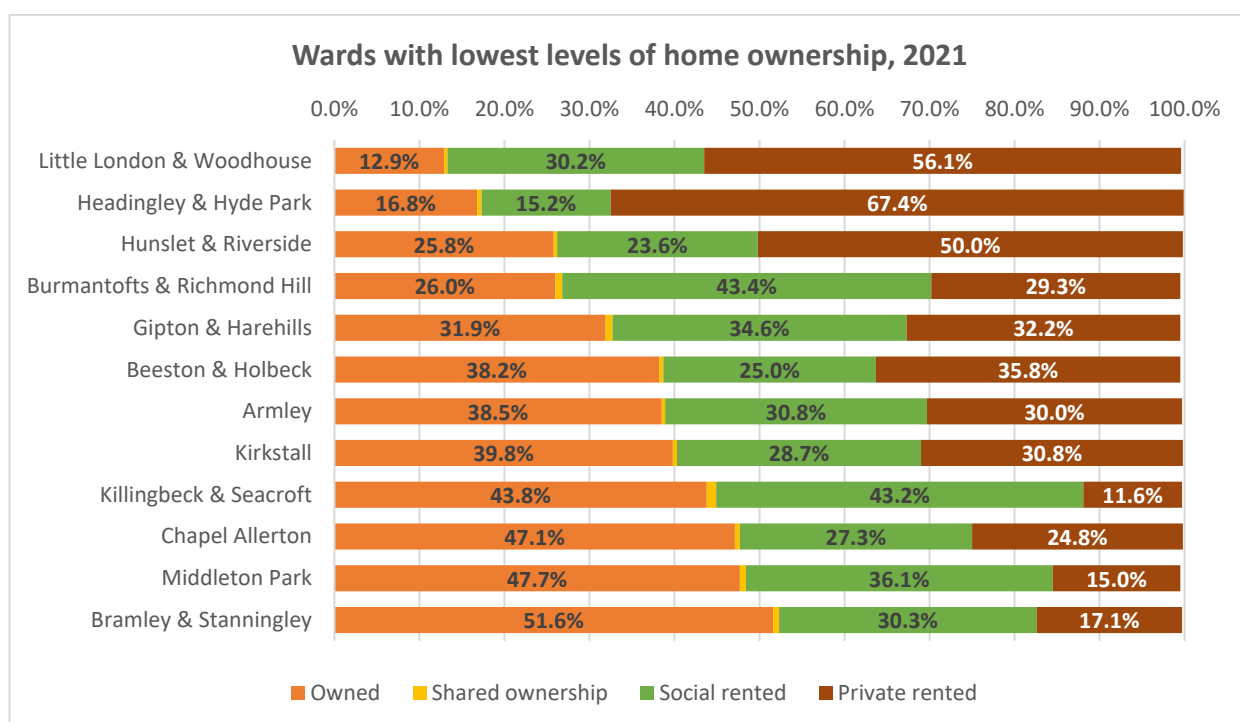
Source: 2021 Census in <https://www.nomisweb.co.uk/>, May 2023

Analysis of the areas with the highest proportions of private rented housing shows three major private rental markets:

- Inner North-West Leeds (Little London & Woodhouse, Headingley & Hyde Park, Kirkstall and Weetwood), where 19,454 residents were living in private rented housing
- the city centre (covered by parts of Hunslet & Riverside, Little London & Woodhouse and Burmantofts & Richmond Hill)
- Beeston & Holbeck, Gipton & Harehills and Armley, all lower-priced areas close to the city centre

Figure 7 shows the wards where the level of privately rented households as a proportion of local stock is above the citywide level of 22 per cent. (See also Appendix 2g.) The figure of 67 per cent for Headingley & Hyde Park was over three times the value for Leeds as a whole.

Figure 8



Source: 2021 Census in <https://www.nomisweb.co.uk/> May 2023
 Any missing percentage points here are accounted for people living rent-free.

Levels of home ownership were lowest in areas with a high proportion of private rented housing (Figure 8 and Appendix 2h). Home ownership accounted for 58 per cent of household tenures in Leeds in 2021.

Figure 8 shows the distribution of households across tenure types in the city's traditional student heartlands. Overall, the level of home ownership in this area was significantly lower than the city average: 24 per cent of households were home-owned, a proportion unchanged since the 2011 Census. At a more granular level, between 2011 and 2021, home ownership:

- increased in Meanwood/Headingley, Central Headingley, Cardigan Triangle, Burley Lodge, Woodhouse and the city centre
- increased in Kirkstall, but was still below the Leeds average

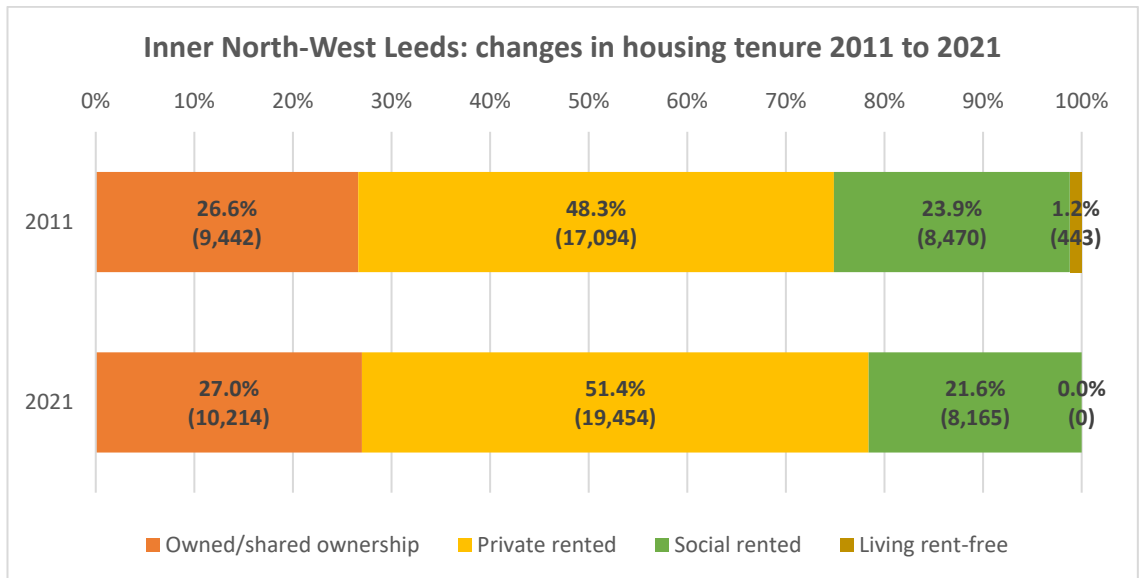
- was higher than the city average in Beckett Park, Far Headingley, Weetwood and West Park.

Compared to 2011, there were 772 more homeowners living in Inner North-West Leeds in 2021, but there were also 2,360 more households renting privately.

C1.2 **Inner North-West Leeds: where students are concentrated**

C1.2.1 **Tenure**

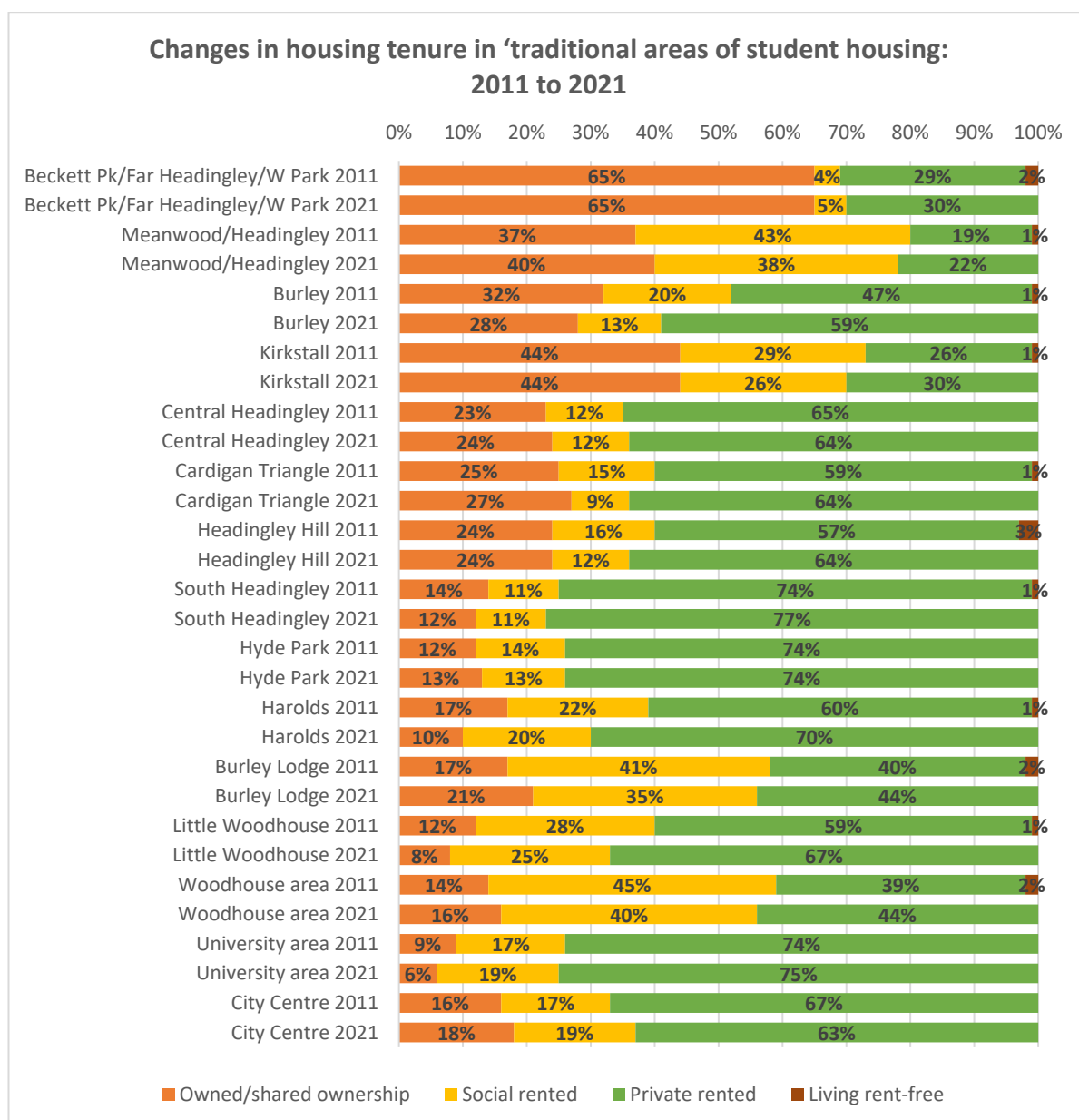
Figure 9



Source; 2021 Census in <https://www.nomisweb.co.uk/> May 2023

The population of Inner North-West Leeds increased by 13,722 between 2011 and 2021, from 88,340 to 102,112. This represents a growth rate of 15.5 per cent over the period – twice that of the Leeds average – and confirms INWL as a high-demand area. At 51 per cent, levels of households renting privately in INWL in 2021 rose by three percentage points across the decade, and were 2.3 times the city average of 22 per cent. Conversely, levels of home ownership in the area were significantly lower than the city average: the proportion was unchanged over the period at 27 per cent.

Figure 10



Source; 2021 Census in <https://www.nomisweb.co.uk/> May 2023

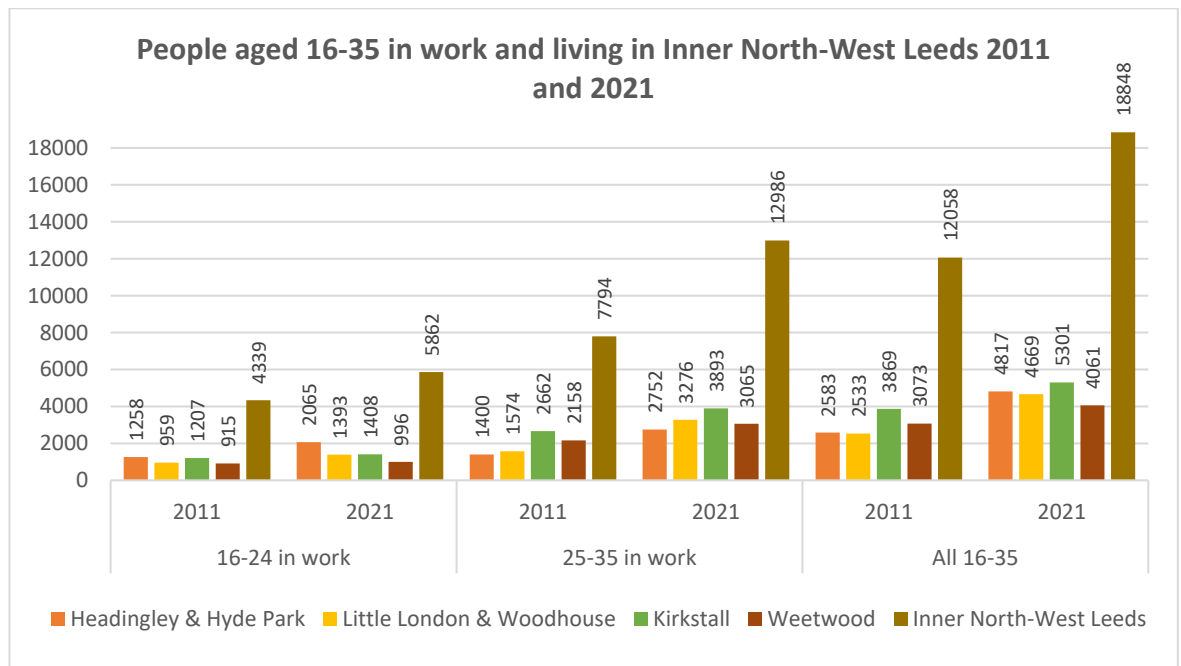
The Census data show that:

- the areas traditionally housing students have higher levels of private rented housing and this has grown as a proportion in all areas between 2011 and 2021 (with the exception of the city centre)
- the level of social housing has decreased
- there has been very limited change in levels of home ownership
- within the area, the highest proportions of households renting from the local authority or housing associations in 2021 were recorded for Woodhouse, Meanwood/Headingley, Kirkstall, Burley Lodge and Little Woodhouse. However, the proportion in all areas has fallen since 2011, except in the university and city centre areas and in Central and South Headingley, where there was no movement (Figure 10)

- Home ownership has increased in Meanwood/Headingley, Central Headingley, Cardigan Triangle, Burley Lodge, Woodhouse and the city centre. (See also Appendix 2i.)

It is likely that alongside continuing demand for private rented housing from students, there has been increasing demand from young working households unable to access or afford other housing options. Figure 11 shows that, in 2021, there were 6,790 more young people in work aged 16-35 living in INWL than in 2011, most of them aged 25-35. This shift has meant an increased proportion of private renters across these areas (see Appendix 2p).

Figure 11



Source: 2021 Census in <https://www.nomisweb.co.uk/> May 2023

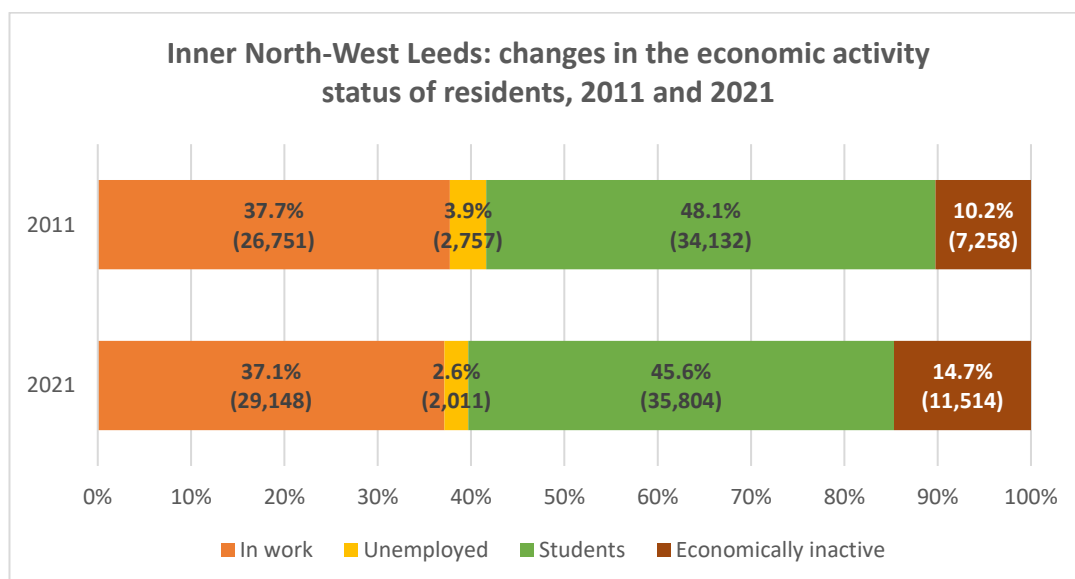
C1.2.2 Competing rental groups: economic activity among people living in the Inner North-West Leeds area

In INWL, across the two Censuses, the number of:

- people in work in INWL increased by just under 2,400, but increased as a proportion of the local population by 0.6 percentage points
- student residents went up by almost 1,700 or 2.5 percentage points
- residents who were economically inactive (including retirees and carers) rose by 4,256 or 4.5 percentage points. (This may indicate that some of those in work in 2011 had retired by 2021.) Any reduction in the working population may have been compounded by the pandemic-related trend for older workers to take early retirement.

Overall, the population is split fairly evenly between students and people in work, or who are retired or economically inactive for other reasons (Figure 12 and Appendix 1n).

Figure 12

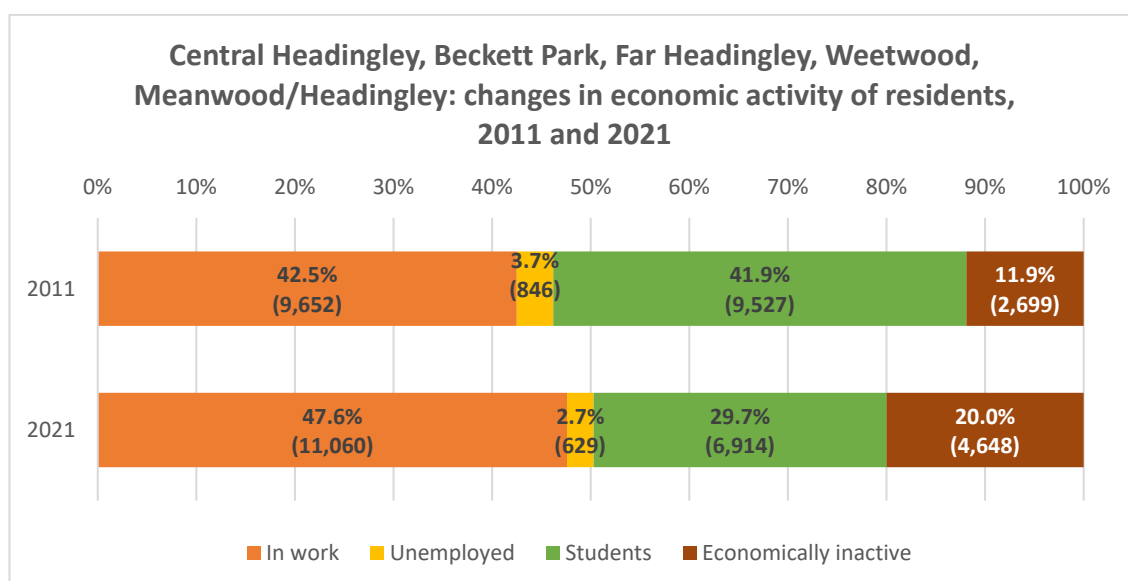


Source: 2021 Census in <https://www.nomisweb.co.uk/> May 2023

Central Headingley, Far Headingley, Beckett Park, Weetwood and Meanwood: the population increased by 527 from 22,724 to 23,251 between Censuses (+2.3 per cent), but within this growth there has been major reconfiguration of the population profile according to economic activity status (Figure 13). Shifts evident from the Census data suggest that:

- students are now less likely to want to live in these areas: there was a 27 per cent fall in the number of students in this area between Censuses (-2,613)
- some working residential households may have returned to the area
- some of those in work in 2011 have now retired or become otherwise economically inactive, reducing the working population.

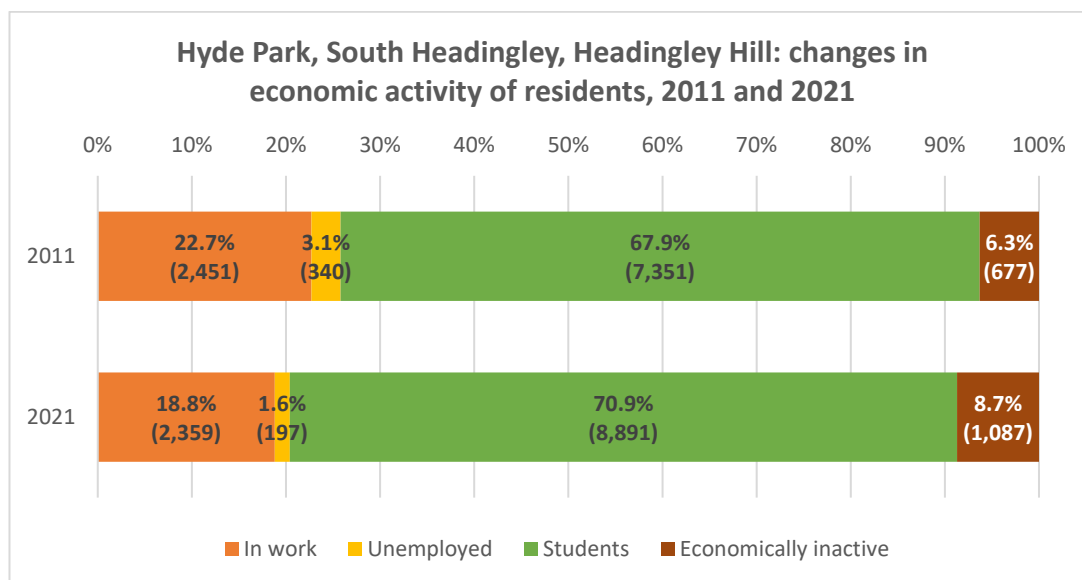
Figure 13



Source: 2021 Census in <https://www.nomisweb.co.uk/> May 2023

Hyde Park, South Headingley and Headingley Hill: the population grew by 1,715 (+15.9 per cent) from 10,819 to 12,534. Most of this increase is accounted for by higher numbers of students (+1,540). Figures for residents in work are broadly level. The student population continues to grow as a percentage of the local population. Figure 14 shows changes in residents' economic activity between Censuses.

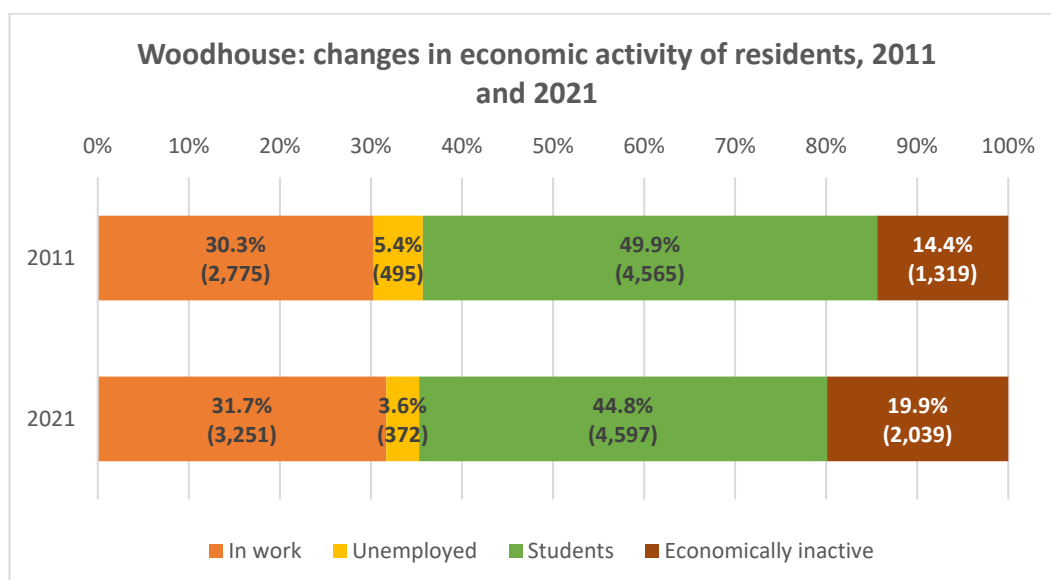
Figure 14



Source: 2021 Census in <https://www.nomisweb.co.uk/> May 2023

Woodhouse: the population increased by 1,105 (+12.1 per cent) from 9,154 to 10,259. Economically inactive residents accounted for most of the growth. People in work and students stayed broadly similar in proportional terms across the 2011-21 timeline. Figure 15 shows changes in economic activity status between Censuses.

Figure 15

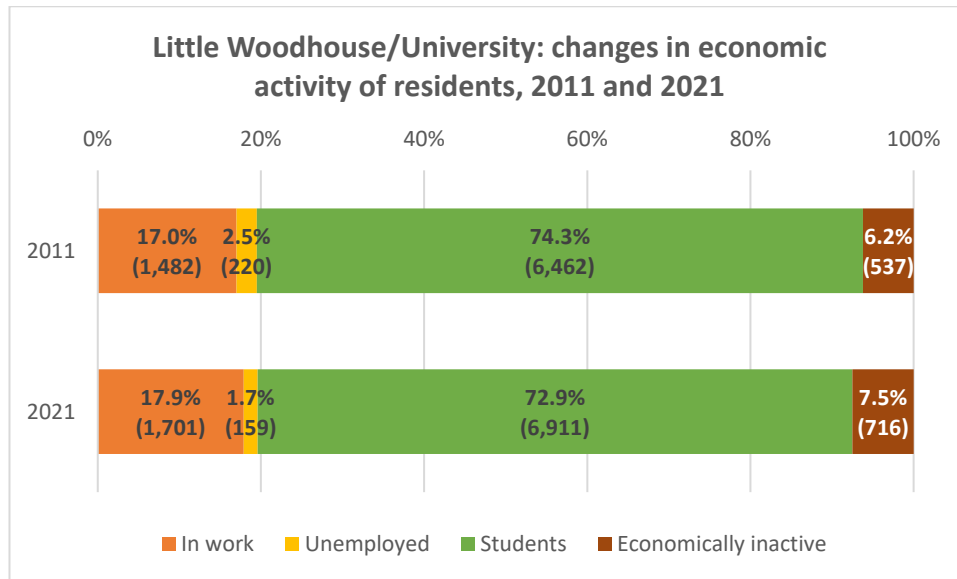


Source: 2021 Census in <https://www.nomisweb.co.uk/> May 2023

Little Woodhouse and University area: between 2011 and 2021, the population grew by 786, up from 8,701 to 9,487 (plus nine per cent). The number of student renters

increased slightly in absolute and proportional terms. Figure 16 shows changes in residents' economic activity between Censuses.

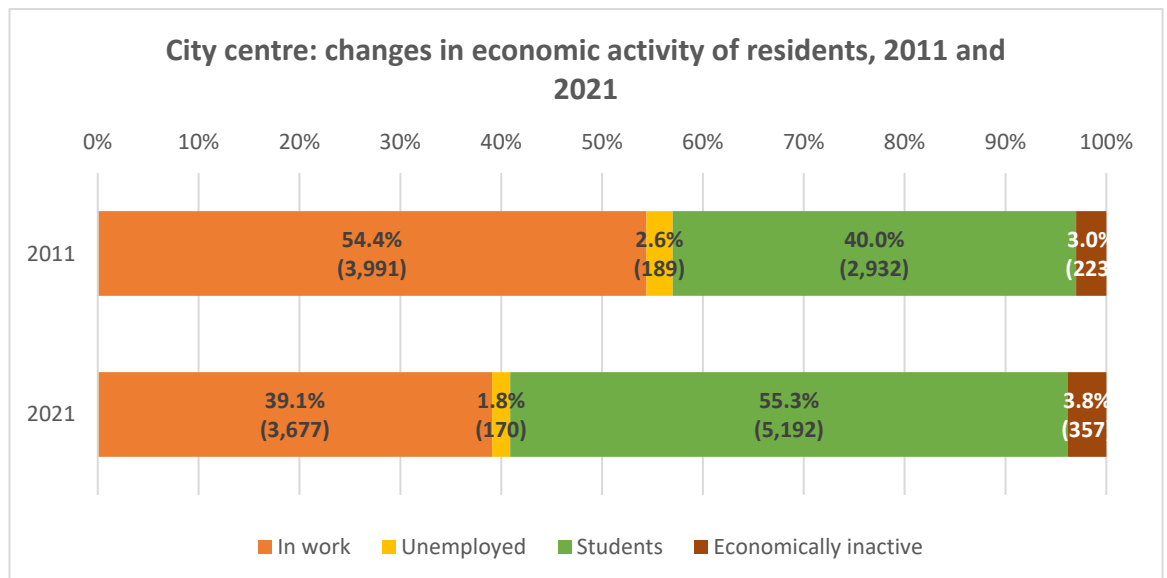
Figure 16



Source: 2021 Census in <https://www.nomisweb.co.uk/> May 2023

In the city centre area, between 2011 and 2021, the population increased by 2,061, up from 7,335 to 9,396 (+28.1 per cent). This major growth is accounted for by a surge in student resident numbers, making them the largest cohort living in the area (55 per cent). Figure 17 shows changes in residents' economic activity between Censuses.

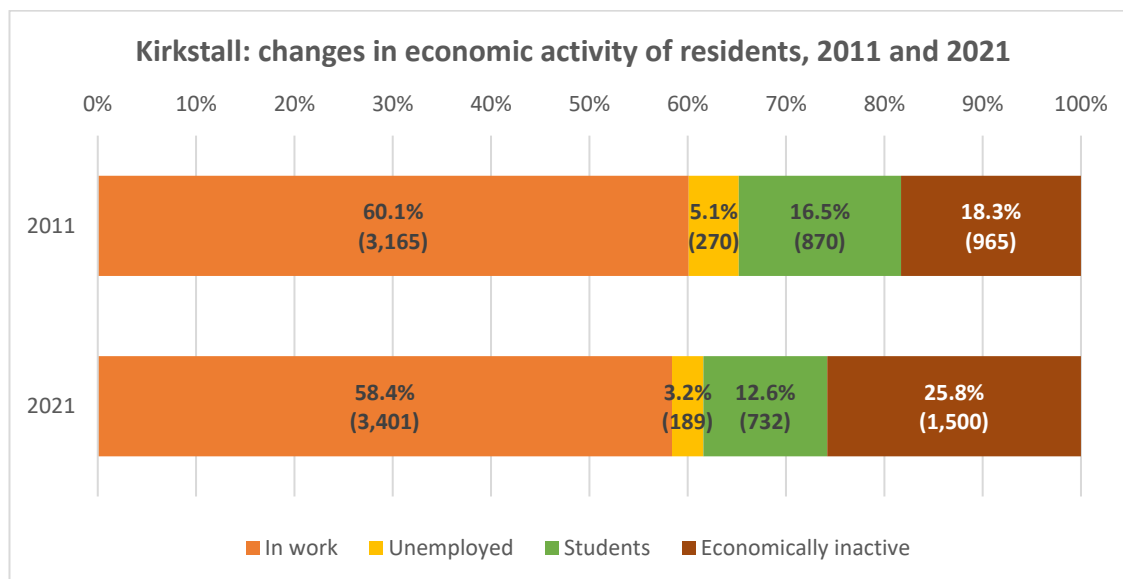
Figure 17



Source: 2021 Census in <https://www.nomisweb.co.uk/> May 2023

Kirkstall: the population grew by 552 between 2011 and 2021, up from 5,270 to 5,822 (+10.5 per cent). Already low student numbers reduced further, while economically inactive residents increased. Figure 18 shows changes in residents' economic activity between Censuses.

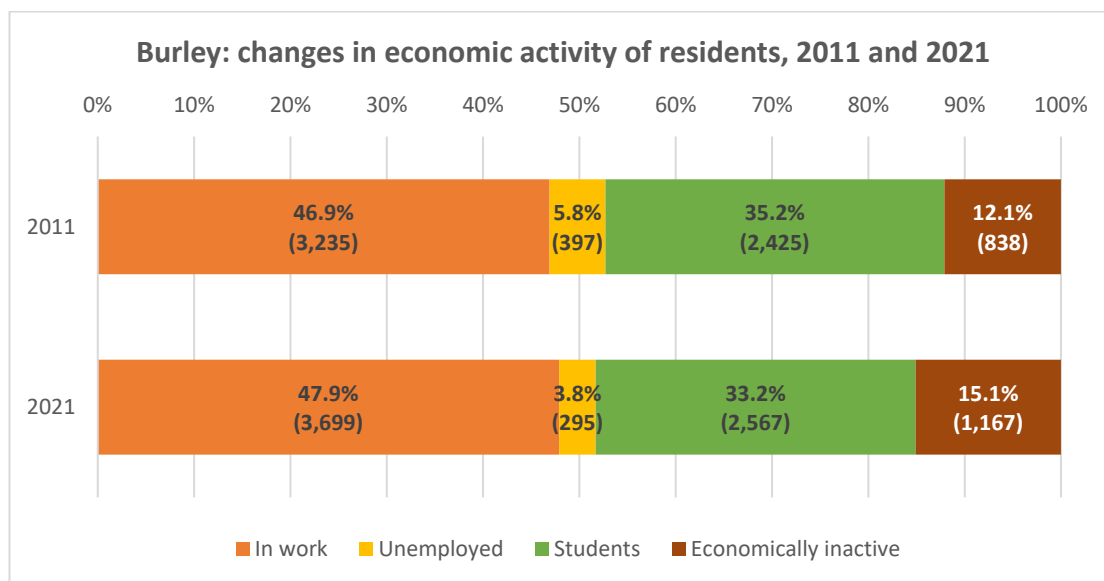
Figure 18



Source: 2021 Census in <https://www.nomisweb.co.uk/> May 2023

Burley: between 2011 and 2021, the population increased by 833, up from 6,895 to 7,728 (+12.1 per cent), driven by moderate growth in student renters and people in work. Figure 19 shows changes in residents' economic activity between Censuses.

Figure 19



Source: 2021 Census in <https://www.nomisweb.co.uk/> May 2023

C1.3 **Conclusions from the Census data**

C1.3.1 *Shifting dynamics*

Over the arc of the two most recent Census snapshots, the market dynamics in Inner North-West Leeds suggest that:

- growth in the INWL population is most concentrated in the city centre (+28.1 per cent) and the Hyde Park, South Headingley and Headingley Hill area (15.9 per cent), driven by increases in student renters
- there has been further consolidation of student populations in most areas close to the city campuses and in areas with already-high concentrations (Headingley Hill,

Hyde Park, South Headingley, Woodhouse, Little Woodhouse/University and the city centre). In 2021, students made up 55 per cent of people renting in the city centre

- in areas further from campus, working households are increasing at the same time as students are reducing – including in Beckett Park, Far Headingley, Weetwood and Meanwood/Headingley
- demand from working – especially young working – households and students remains buoyant; is likely to increase further; and is noticeably higher in INWL than the Leeds average
- younger workers aged over 25 may regard Hyde Park, and to a lesser extent Headingley, as primarily for students, and may accordingly look elsewhere for shared housing options – typically in Burley, Kirkstall or other parts of North Leeds (Chapel Allerton, Roundhay, Moortown and parts of Chapeltown)
- inter-Census shifts in the balance of working and economically inactive households may be a function of an ageing population, as the volume of retiree (and economically inactive) households outpaces the inflow of new working households. Alternatively or additionally, it may reflect migration of older working households out of INWL and into other parts of the north-west of the city and into North-East Leeds.¹³

The PRS market across Leeds is catering for the housing needs of a range of different groups. There is strong demand from students and young working households, as well as from families, benefit claimants and people who are economically inactive.

The high and fast-rising level of households renting privately across Inner North-West Leeds is a strong indicator that the area has become a starter market for young households – made up of students, graduates and other young people in their first or second jobs, and young couples. The shared housing market has become a means to meet the housing needs of younger households. Analysis of Census data suggests that young workers do not appear to be replacing students as residents in the private rented sector in Inner North-West Leeds, but are adding demand pressures on a supply that may not be sufficient to meet the increasing demand.

C1.3.2 *Growing demand in the INWL private rented sector: the role of shared housing*

More fundamentally, the tenure balance and demand trends evident in INWL are being shaped by what is affordable for younger households (see Section E2 on private rents in Leeds; also Appendix 3g). The self-contained housing market is unaffordable for a sizeable chunk of the population, and will likely stay out of reach for many. Younger people – especially those in their first or second jobs – are less able than ever either to access ownership or to afford the rent for a one- or two-bed property. As other options recede, shared private rented housing is becoming the main route through which many such households can meet their housing needs.

Given the increasingly acute shortage of affordable self-contained housing options open to younger working households, demand for shared housing is set to remain buoyant and is likely to increase. Because Inner North-West Leeds is already recognised as a major, if not the primary, location of shared rented housing in Leeds and because much of the stock is good quality, it is likely that demand for shared housing in the area will also continue to be buoyant and most likely will grow.

Competition for larger properties from investors and mature residential households appears to have exerted upward pressure on prices. More mature working households in the market for private rented housing may find prices in INWL too high and look elsewhere.

Increasing demand may fuel investor interest – especially among younger or would-be landlords – in acquiring properties to let to younger tenants. This may result in more shared houses in INWL. If longer-standing landlords decide to leave the market and dispose of their portfolios, it is unlikely that their stock will revert to the owner-occupied sector: prices are relatively high and often out of reach of first-time buyers, and more mature households may see more attractive purchase options in other suburban areas. It is as yet uncertain if there is an appetite for newer landlords to pick up divested stock. The likelihood of an increasing supply of shared private rented housing to meet demand is then also uncertain.

In this context, universities are unlikely to be able to rely on the private rented market to absorb student demand, if PBSA volume falls short of demand from new students, international students and returning students wanting to remain in or re-enter PBSA.

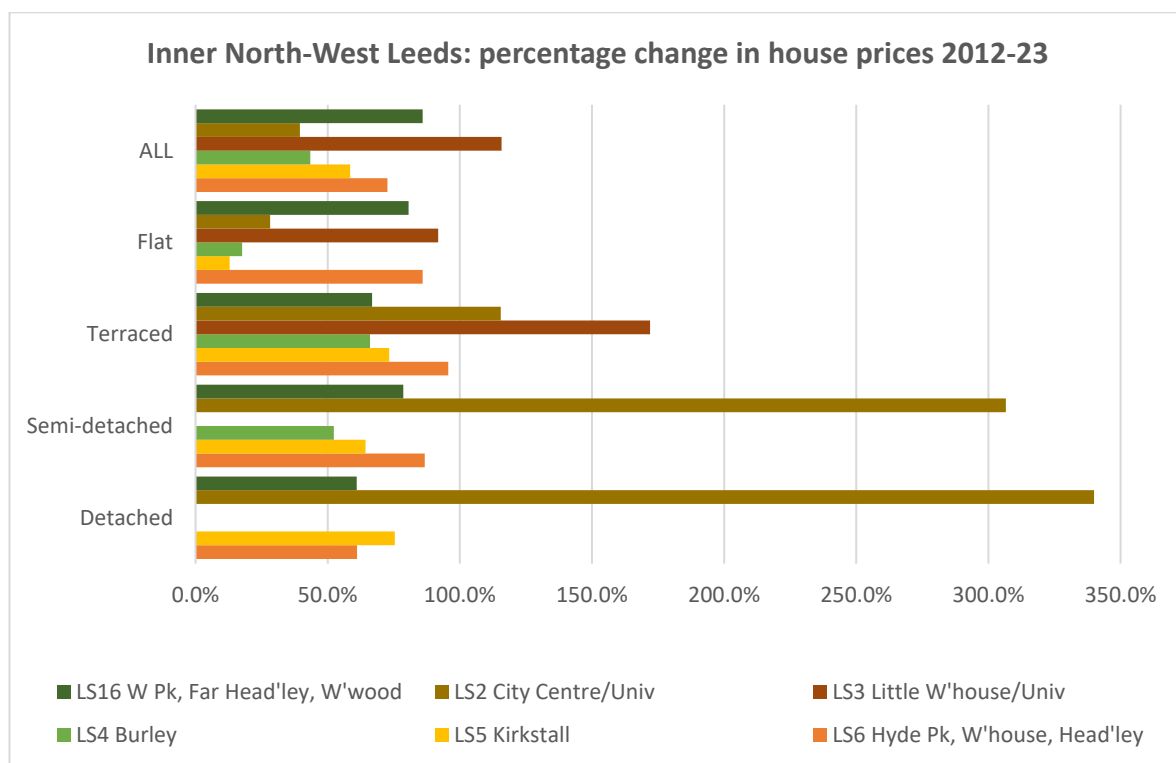
C2 House prices

C2.1 INWL localities and stock types compared

House prices relative to average incomes are significant for the purposes of this research, because:

- the affordability of starter homes is a key determinant of the volume of young working people in the shared housing and home ownership sectors
- the valuation of rented properties provides some insight into their affordability relative to local owner-occupied properties and into the likelihood of properties moving between tenures
- the market value of houses is ultimately related to rent levels.

Figure 20

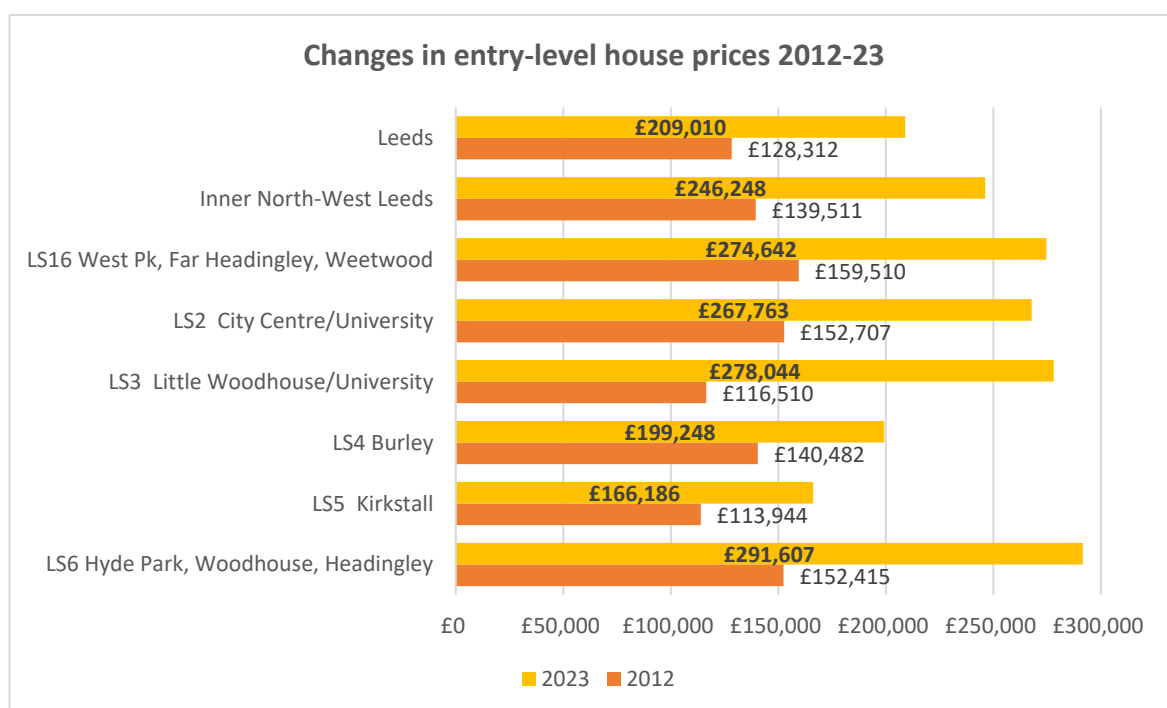


www.home.co.uk and www.rightmove.co.uk May/June 2023

The average price for a property in areas traditionally housing students (Inner North-West Leeds) is currently £279,155, compared to £277,221 for Leeds as a whole. At a more detailed level:

- houses prices are significantly higher than the city average in LS16 area (covering Far Headingley, West Park and Weetwood) and the LS6 area (covering Hyde Park, South Headingley and Central Headingley)
- prices in all other areas within INWL are lower than average (Figure 21). (See also Appendix 3a and 3b).

Figure 21



www.home.co.uk and www.rightmove.co.uk May/June 2023

In particular, prices for terraced houses were considerably higher across INWL (£302,185) than Leeds as a whole (£204,767), and rose by 96.2 per cent between 2012 and 2023 (64.2 per cent citywide). Prices of flats were lower than the city average and increased at a slower rate across the same timeline (52 compared to 62 per cent citywide).

There was significant variation in prices for starter homes in INWL. Properties in Burley and Kirkstall were cheaper than the Leeds and INWL averages. Outlying localities in the area were more expensive and would stretch affordability for most first-time buyers (see also Appendix 3c).

For semi-detached houses, which are more commonly offered as shared rental properties, prices were also substantially higher than for Leeds as a whole – £328,825 as against £273,066. They nearly doubled (+97.3 per cent) across the period, likely driven by the constraints on new supply imposed by the Article 4 planning restriction (see Section C3.2). By contrast, the level of increase for the city ran at two thirds (+66.9 per cent).

There are, however, indications that prices may be reducing in some areas and for some types of properties. Across Leeds, over the last year, prices of detached, semi-detached and terraced houses have fallen, although prices overall appear to be around four per cent higher than in May 2022 (see Appendix 3b). In INWL, prices of detached and terraced

properties have also gone down, but, overall, prices still appear to be nine per cent up on May 2022. Prices of terraced properties have reduced by more than the city average (-5.7 per cent) in the Headingley, Hyde Park and Woodhouse areas; in the Far Headingley, Weetwood and West Park area; and in Burley.

Data presented in Appendix 3d shows that, in the Inner North-West Leeds area, home buyers would require:

- an average household income of £41,285 and a deposit of £12,798 to afford a one-bed property
- an average household income of £73,545 and a deposit of £22,799 to afford a two-bedroom property
- an income of £102,548 and a deposit of £31,790 to afford a three-bedroom property.

Appendix 3d also shows that in the INWL, home buyers would need:

- an average household income of £61,341 and a deposit of £19,031 to afford a flat
- an average household income of £97,479 and a deposit of £30,219 to afford a terraced house
- an income of £106,073 and a deposit of £32,883 to afford a semi-detached house.

C2.2 *Conclusions from house price data*

In 2023, house prices in most parts of INWL were above the Leeds average and rising more quickly. These trends strongly suggest that residential properties in the area were in high demand for both owner-occupation and investment. This inference is supported by the near doubling of prices between 2012 and 2023 for semi-detached properties, which are used for both purposes.

In the northern section of INWL, prices are higher than the city and INWL averages. Taken together with the growth of working residents, this finding indicates consolidation of the area as a demand hotspot in the owner-occupier market. In the student heartlands of Hyde Park, Woodhouse and Headingley, increasing student occupation and rising house prices signal high demand from investors, confirming that these areas are becoming still more firmly established as student communities. Here, potential home-owners are likely to remain deterred by price levels that compare unfavourably with options elsewhere in the city. Smaller properties closer to the city centre and in Burley and Kirkstall are relatively affordable and are likely to be easier to switch between tenure types.

C3 The planning environment for student housing in Leeds

This section sets out details of local and national planning policy. These have been included because they are relevant to the aims of this report:

- Planning policy has a direct impact on the supply of new housing and the ability of the city to accommodate student renters
- Historically in Leeds, the expansion of student housing (both HMOs and PBSA) has been controlled by planning restraint in response to community and local authority concerns
- At the time of writing, Leeds City Council was in the process of reviewing and publishing its Local Plan 2040, scheduled to address student accommodation as a significant consideration.

C3.1 **Local authority responsibilities**

Responsibility for issues relating to student housing in Leeds is shared between two local authority departments:

- City Development
- Communities, Housing & Environment.

Planning policy for student housing is the responsibility of the Chief Planning Officer and is covered through the Leeds Local Plan – and in particular Policy H6. Within the Planning Department, the Planning Policy Team is charged with ensuring that the policies set out in the Local Plan are fit for purpose. Responsibility for HMO policy and planning application matters lies with the Development Management team. Housing strategy is overseen by the Executive member for Housing and is formulated through the Leeds Housing Partnership Board. Delivery is through the Director of Communities, Housing & Environment.

C3.2 **The Council's current planning policy on accommodation for students**

C3.2.1 *Strategic issues*

The Council formally recognises the important contribution students make to the local economy and the cultural life of the city. Its current Local Plan is explicit on the role to be played by students in the future growth of Leeds:

The City's universities and specialist colleges are an important part of the Leeds economy ...

Leeds has a strong higher education sector with three Universities; the University of Leeds, Leeds Beckett University and Leeds Trinity University College. The City is also home to Leeds City College, Leeds College of Art, the Leeds College of Music, and the Northern School of Contemporary Dance ...

The University is now the UK's second-largest, and the third largest employer in the City with more than 30,000 students from 130 countries. It has set itself the target of being among the top 50 universities in the world by 2015. Leeds Beckett University has another 30,000 full-time and part-time degree students, and is the City's fourth-largest employer ...

The large student population gives the City a real energy. Leeds has a young population especially in the areas of Headingley and Hyde Park and Woodhouse, and many students choose to continue to live and work in the City following their graduation.

The Council is keen to ensure that the range of student housing needs is met and that the supply of PBSA is sufficient to meet known needs. However, this positive approach is tempered by a measure of caution, and there are voices registering concern that:

- city centre PBSA is straightforwardly high-cost provision for rich international postgraduates
- growth in supply would become unsustainable, if the recruitment stream for this particular segment slackened for whatever reason
- high student concentrations in some localities continue to carry significant risks of anti-social behaviour.

The Council has encouraged growth in PBSA provision 'in order to meet need and to deflect pressure away from private rented houses in areas of over-concentration'.¹⁴ At the same time, the local authority recognises that shared HMO housing is becoming an established part of the local housing market, and will continue to play a vital role in meeting the housing needs of students, along with the growing number of young working households also reliant on this option.

The Council applies the Article 4 Directions on a case-by-case basis. It exercises flexibility where there are larger proportions of HMOs, based on a recognition that application of the A4D in those areas could be counterproductive. There are currently no plans to review the use of the Article 4 Directions or their scope.

Current Council policy on student accommodation of all types is set out in Policy H6 of the Leeds Local Plan: Core Strategy (as amended by the Core Strategy Selective Review 2019): Houses in Multiple Occupation (HMOs), Student Accommodation and Flat Conversions.

C.3.2.2 *The Local Plan: policy on PBSA*

Part B of Policy H6 notes the considerable development of new PBSA between 2001 and 2011, *'particularly in and around the north west sector of the City Centre'*, adding that *'growth in this accommodation is to be welcomed in order to meet need and to deflect pressure away from private rented houses in areas of over-concentration'*. The Plan is clear about the need to ensure that purpose-built accommodation does not itself become over-concentrated, and is located with good access to the universities.¹⁵ Under Part B, development proposals for PBSA will be controlled:

- (i) To help extend the supply of student accommodation taking pressure off the need for private housing to be used,*
- (ii) To avoid the loss of existing housing suitable for family occupation,*
- (iii) To avoid excessive concentrations of student accommodation (in a single development or in combination with existing accommodation) which would undermine the balance and wellbeing of communities,*
- (iv) To avoid locations which are not easily accessible to the universities by foot or public transport or which would generate excessive footfall through residential areas which may lead to detrimental impacts on residential amenity,*
- (v) The proposed accommodation provides satisfactory internal living accommodation in terms of daylight, outlook and juxtaposition of living rooms and bedrooms.*

C3.2.3 *The Local Plan: policy on HMOs*

Planning policy for HMOs is contained in Part A of Policy H6 Houses in Multiple Occupation, Student Accommodation and Flat Conversions. It incorporates the use of the Article 4 Directions for Leeds, adopted in 2012.

The Article 4 Directions remove permitted development rights within the wards of Adel & Wharfedale, Armley, Beeston Hill & Holbeck, Bramley & Stanningley, Burmantofts & Richmond Hill, Chapel Allerton, City & Hunslet, Gipton & Harehills, Headingley, Horsforth, Hyde Park & Woodhouse, Kirkstall, Moortown & Roundhay and Weetwood.

The Core Strategy recognises the need for growth in HMOs, while avoiding high concentrations of them – something which the Council believes causes loss of amenity and undermines the health and stability of communities. Within the area of Leeds covered by the Article 4 Directions, development proposals for new HMOs will be determined:

- (i) To ensure that a sufficient supply of HMOs is maintained in Leeds,*
- (ii) To ensure that HMOs are distributed in areas well connected to employment and educational destinations associated with HMO occupants,*
- (iii) To avoid detrimental impacts through high concentrations of HMOs, which would undermine the balance and health of communities,*

- (iv) *To ensure that proposals for new HMOs address relevant amenity and parking concerns,*
- (v) *To avoid the loss of existing housing suitable for family occupation in areas of existing high concentrations of HMOs*

Changes of occupation for houses from dwelling-house (Class C3 of the Use Class Order) to small shared houses (Class C4) need planning permission in the area affected by the HMO Article 4 Directions. This requirement applies in all of inner Leeds and adjoining suburbs. Changes of occupation to large shared houses (*sui generis*) already require planning permission in every part of the city.

In the interpretation of H6A iii), it is recognised that some streets (or a part of a street) may already have such a high concentration of HMOs that the conversion of remaining C3 dwellings will not cause further detrimental harm. Also, in the interpretation of H6A v), it may be the case that the remaining C3 dwellings would be unappealing and effectively unsuitable for family occupation. In such circumstances, Policy H6A would not be used to resist changes of use of such dwellings to HMOs. In order to encourage landlords to experiment with lettings of HMOs to non-HMO occupants:

The Council will consider granting flexible C3/C4 permissions for new and existing C4 HMOs. This process, also known as ‘flipping’, enables a C4 HMO to convert to a C3 dwelling house without losing the potential to revert back to C4 use within a fixed period (normally 10 years). If a property has a lawful C4 use when applying for a flexible permission this will then be a material consideration when the Council considers the planning application. The permission will enable flexibility to let a property between C3 and C4 uses during the specified period. On expiry of the dual use period, the use of the property at that time would become the permitted use of the property.¹⁶

C3.3 **The Council’s future planning policy on accommodation for students**

C3.3.1 *The Leeds Local Plan 2040 and the Strategic Housing Market Assessment*

Preparatory documentation for the revision of the Leeds Local Plan makes reference to student accommodation as an issue in need of address. The Council recognises that demand for, and supply of, student accommodation in Leeds have changed significantly over the last 20 years. Specifically, it identifies a rapid increase in the supply and delivery of PBSA schemes, effecting a shift away from the model of co-living in the outer areas and towards residential life in self-contained studio units in the city centre.

The Council is keen to ensure that it has proper understanding of:

- current PBSA capacity
- demand forecasts for PBSA
- affordability, given that PBSA appears to be more expensive, as developers seek to maximise returns by offering mainly top-end products.

In reviewing the Local Plan, policymakers will take a strategic approach to student housing in Leeds that assesses the size and quality of the market and how it interacts with other sectors.

The Council has recently started on the groundwork for formulating a Leeds Local Plan to 2040. This is a major exercise and will involve considerable consultation. The local authority will encourage stakeholders to shape policy on student housing as part of the consultation process.

The Strategic Housing Market Assessment (SHMA) for Leeds is currently being drafted. Although it will feature student housing, coverage will not be detailed. The Council is hoping to use this research as a major source of evidence for the development of policies in the Local Plan.

C3.3.2 *Supplementary planning*

In accordance with a commitment made in Leeds Core Strategy Policy H9, the Council has produced a supplementary planning document (SPD) to introduce minimum space, light, and ventilation (amenity) standards for new proposals for HMOs, PBSA and co-living developments. It will be used to help determine planning applications for these types of proposals. The SPD will help to ensure that residents of new HMOs, PBSA and co-living schemes have an appropriate standard of amenity which will help to improve health and wellbeing within communities in line with Council priorities. Initial consultation is in progress. Responses will be analysed and, where appropriate, changes made to the draft SPD. Further, pre-adoption consultation will take place in due course.

Consultation documents:

- [Draft HMO PBSA and Co-Living SPD - Consultation Version \(PDF, 1.85MB\)](#)
- [SPD Appendix 4 PBSA Analysis 2001 - 2018 \(Excel, 413KB\)](#)
- [SPD Appendix 5 PBSA Analysis 2016 - 2020 \(Excel, 79.5KB\)](#)

D DEMAND AND SUPPLY

This section explores and compares levels of student demand and student accommodation supply in Leeds over time. For accommodation, the primary focus here is PBSA, because it is much more readily identifiable and quantifiable. Other supply streams – specifically the off-street private rented sector – are a less-known quantity with no definitive way to measure student-occupied properties. They are instead best measured and analysed through their use/occupancy by the students who make up the demand pool (see Section F).

D1 The headlines

D1.1 *Demand: full-time student populations, 2014/15 to 2027/28*

Between 2014/15 and 2022/23, citywide full-time student numbers grew by 9,522, up from 50,491 to 60,013 (+18.9 per cent). Available information on student number planning indicates future growth of 4,061 between 2022/23 and 2027/28 (+6.8 per cent).

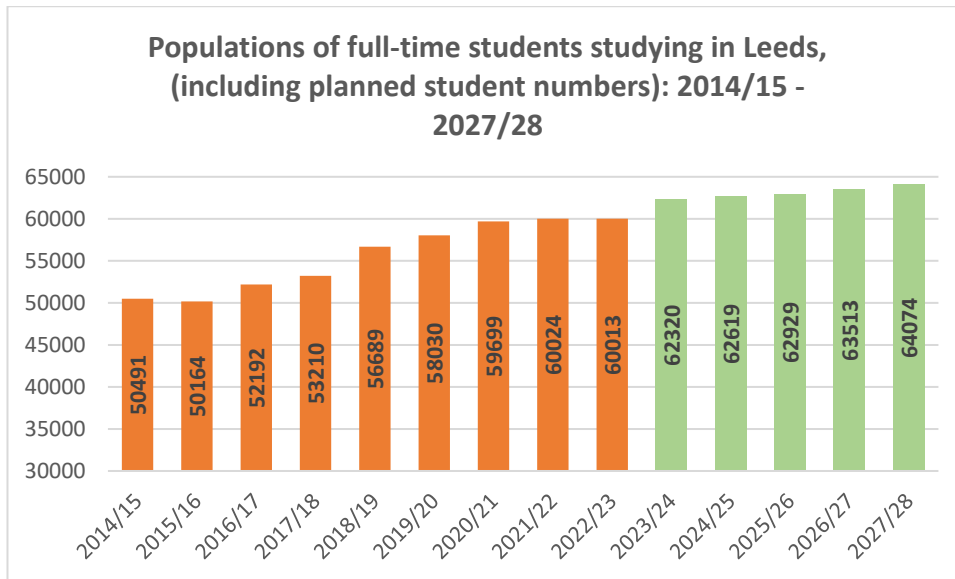
Figure 22a shows citywide full-time student populations from 2014/15 to 2022/23 and numbers forecast for 2023/24 to 2027/28 (see Appendix 1 for relevant data sources).¹⁷ Figure 22b shows year-on-year changes in student numbers based on the available figures. Between 2014/15 and 2022/23, citywide full-time student numbers grew by 9,522, up from 50,491 to 60,013 (+18.9 per cent). Available information on student number planning indicates future growth of 4,061 between 2022/23 and 2027/28 (+6.8 per cent).

For the full period 2014/15 to 2027/28 (encompassing both actual and planned growth), there are three distinct trends:

- growth front-loaded into the period 2014/15 – 2020/21 (+9,208)
- a plateau between 2020/21 to 2022/23 (+314). (This reflects the fact that, against the trend for much of the higher-tariff segment, the University of Leeds did not experience a spike in home undergraduate intakes during the height of Covid restrictions – in part because of their success in managing numbers through the offer of incentives to defer entry). This factor has also contributed significantly to Leeds as a city having avoided the accommodation crises seen elsewhere in autumn 2022)
- after a step-up in 2023/24 (+2,307), modest planned growth from then to 2027/28 (+1,754).

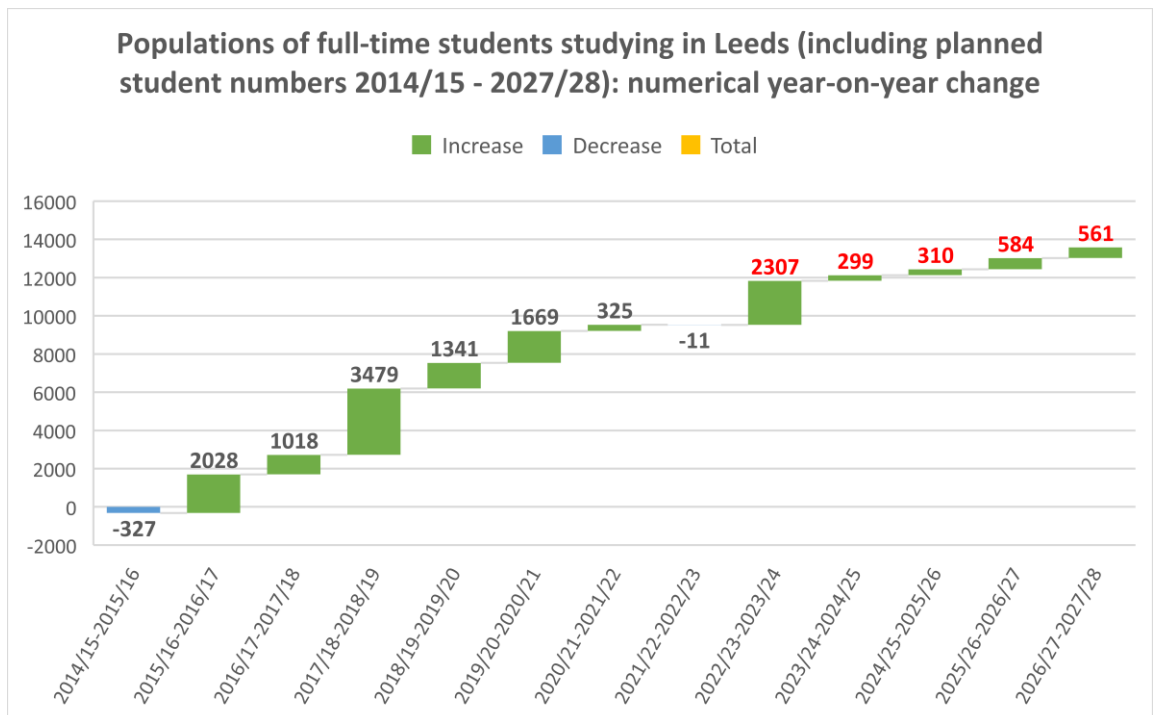
On a cautionary note, it is difficult for universities to make accurate forecasts of future student numbers, given market fluctuations, unexpected headwinds and unanticipated opportunities (for example, the recent surge in overseas demand for UK postgraduate courses). Institutional and citywide student numbers are strongly factored by the issues set out in Section B. Student number planning targets are generally worked out on a rational and realistic basis, grounded in the best intelligence available to individual higher education providers, but they often also have an aspirational dimension.

Figure 22a



Source: data provided by institutions and HESA returns

Figure 22b

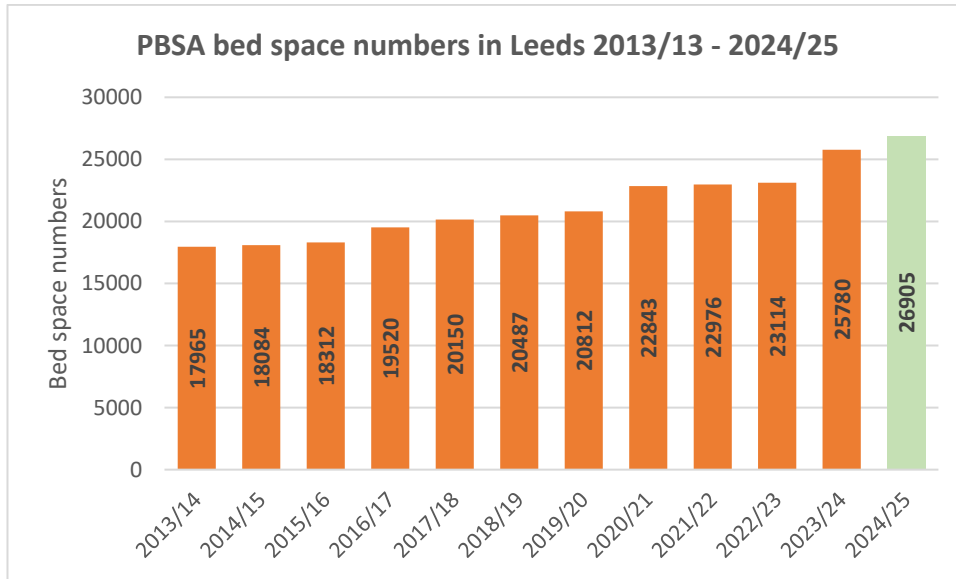


Source: data provided by institutions and HESA returns

D1.2 **Supply: stock volume in the PBSA sector**

The volume of purpose-built student accommodation in Leeds is set out in Figure 23 for the period 2013/14 – 2023/24.¹⁸ These are aggregate figures for privately and university-owned stock, and take account of bed spaces dropping out of the system as well as new rooms over time. A column has also been included for 2024/25: 1,125 new PBSA beds are anticipated to enter the market next year, based on available intelligence about sites where construction is in progress and to schedule.

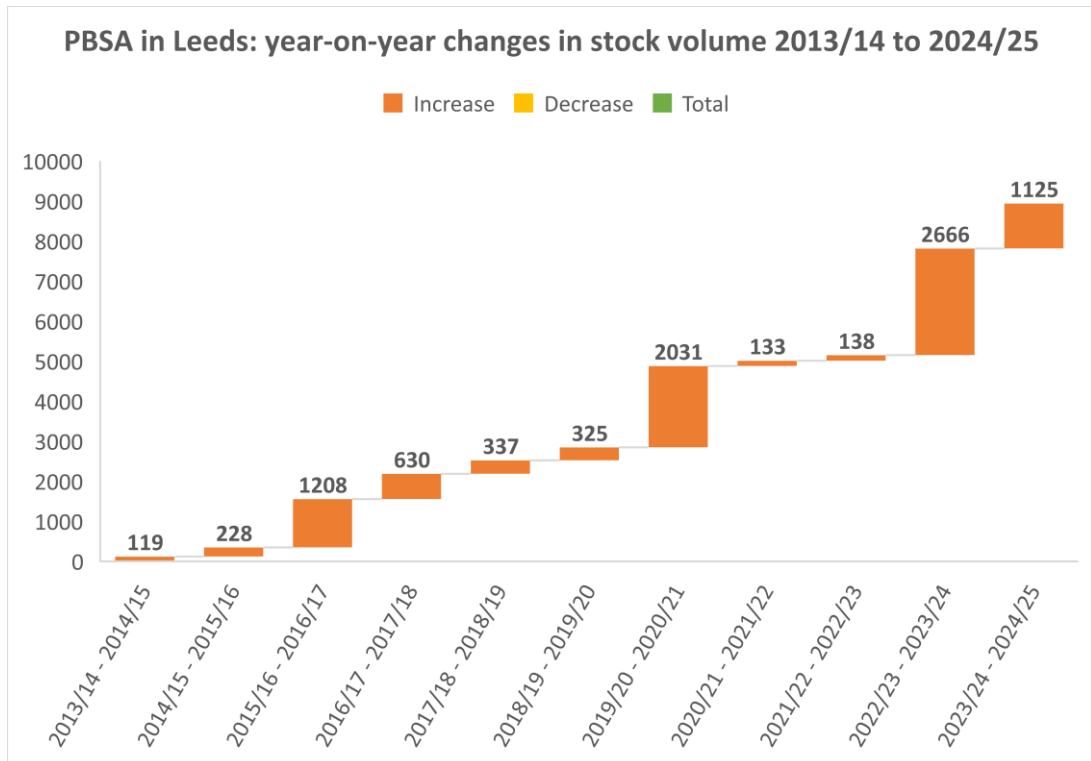
Figure 23



(Courtesy of Cushman & Wakefield Student Accommodation Tracker)

On the basis of the same timeline used for student number growth, between 2014/15 and 2022/23, PBSA bed space numbers in Leeds rose by 5,030, up from 18,084 to 23,114 (+27.8 per cent). The expansion of PBSA volume is therefore at a rate higher than for student numbers over this period.

Figure 24

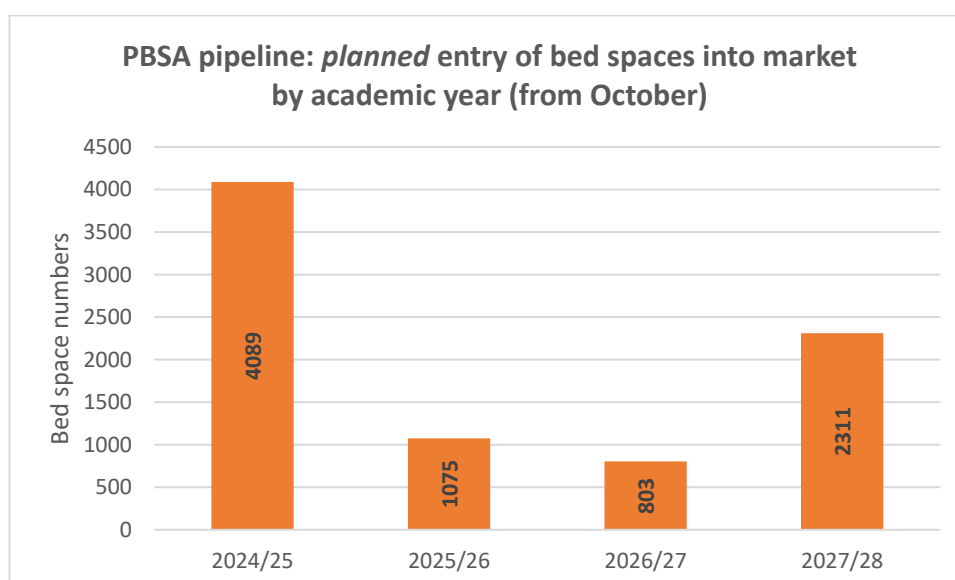


Source: Cushman & Wakefield Student Accommodation Tracker

Figure 25 shows PBSA pipeline figures for Leeds to 2027/28. They amount to 8,278 and include development for which approval has been granted (7,663 beds) and other applications submitted (615 beds). (The detailed schedule of live planning approvals and submissions is attached as Appendix 4.) Looking at the number of PBSA planning permissions can be an unreliable predictor of growth in volume, and extreme caution needs to be exercised in positing the pipeline figures as a future reality. Currently, unless there is a spade in the ground, actual building is unlikely to happen in the short term: developers are struggling to maintain viability because of volatile build and funding costs. The modest supplement to existing stock already noted for 2023/24 and 2024/25 is likely to be followed by a virtual standstill in new provision for summers 2025 and 2026 at least.

Beyond the medium term, commercial perspectives among student property consultants remain positive about the prospects for investment in the Leeds PBSA market, referencing its strong demand pool and the availability of well-located sites, particularly in and around the city centre.

Figure 25



Source: Cushman & Wakefield Student Accommodation Tracker

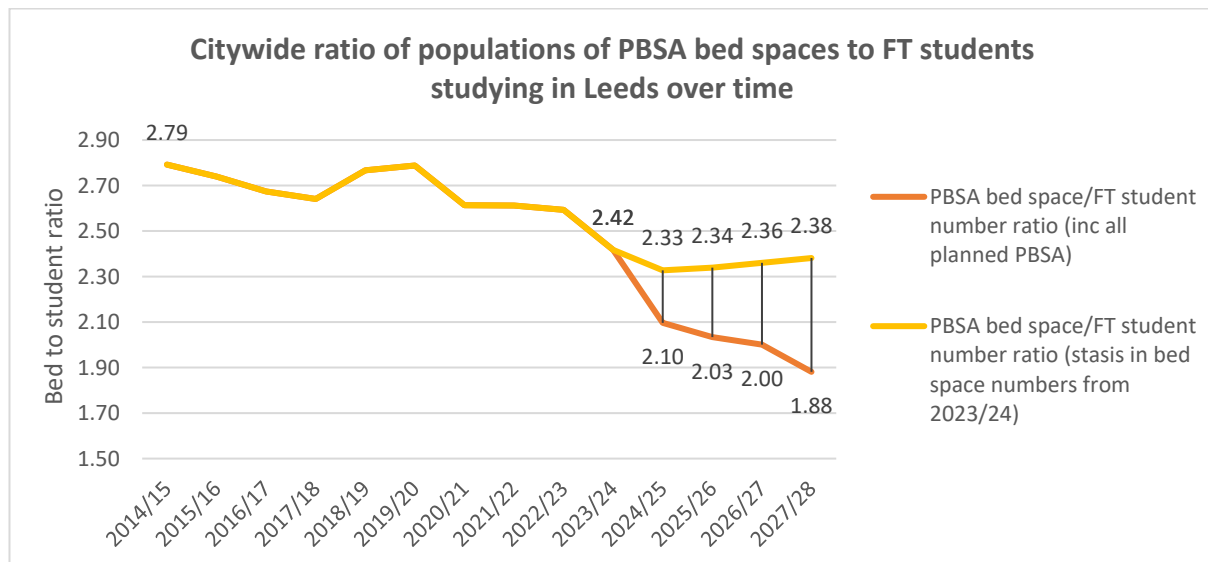
D1.3 **Student demand and PBSA supply: how the numbers match up**

Figure 26 shows how many full-time students there have been in Leeds for each PBSA bed space since 2014/15. It also models, on the basis of the planning data available, two scenarios for the period 2024/25 to 2027/28: one for full realisation of pipeline bed spaces (highly unlikely), the other for no change in PBSA volume for the period 2025/26 – 2027/28. The posited figures do not take account of any bed spaces exiting the system either temporarily or permanently, because these are unknown.

The overall declining line across the period 2014/15 – 2022/23 may be read as a slackening market, but it actually reflects supply rising to meet a growing preference for, or at least acceptance of, PBSA among returning undergraduates and taught postgraduate students. Stagnating supply and intensifying competition with other rental groups in the off-street sector may also have been a factor in the trend-line. On the face of it, the worst eventuality of stasis in supply until 2027/28 (2.49) does not look overly concerning in the context of the historical values against this index and university recruitment plans.

However, any rise in the ratio from a currently tight market could result in a supply shortfall in reality. The key unknowns that will determine the extent of the medium-term challenge are student number levels; shifting preferences of student consumers that may be factored by what is affordable; but, much more critically, how capacity in the off-street sector holds up.

Figure 26

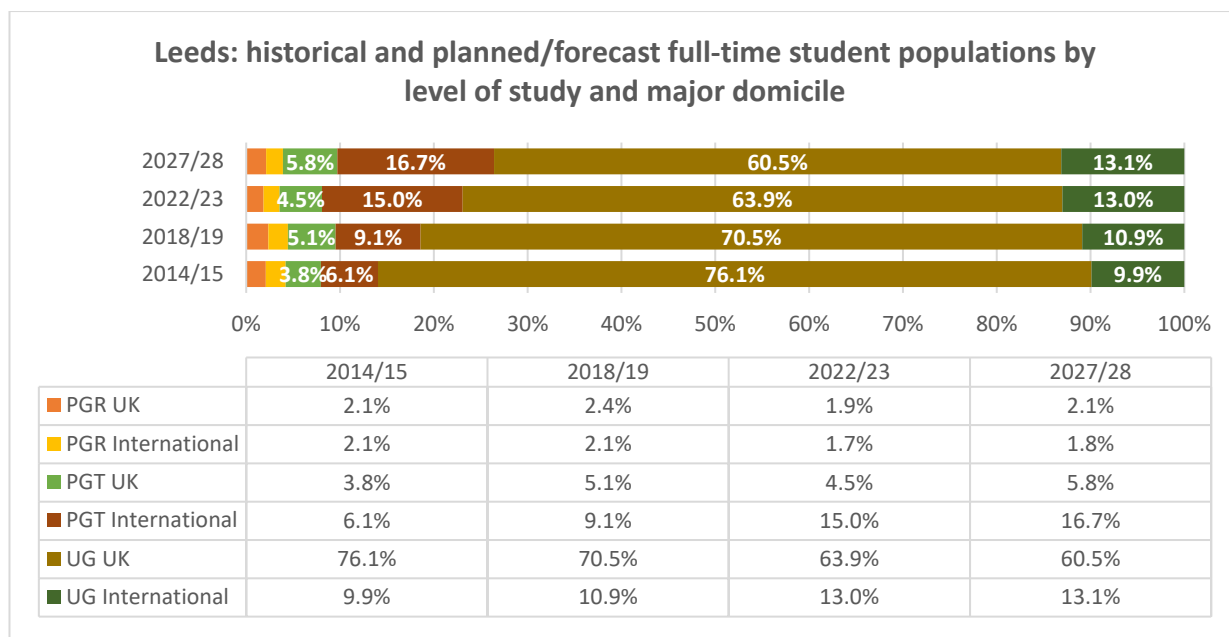


D2 Beneath the headline figures

D2.1 The evolving shape of the full-time student population in Leeds

Headline student numbers tell one story, but insight into the changing composition of the Leeds student population is necessary to understand housing need and how it is becoming more stratified.

Figure 27



Source: historical and student number planning data provided by institutions and HESA returns

The two most striking trends evident in Figure 27 are:

- the rapidly increasing share of the full-time student population accounted for by the taught postgraduate segment, specifically taught postgraduates from overseas
- the rapidly shrinking presence of home undergraduates as a proportion of full-time student populations over time.

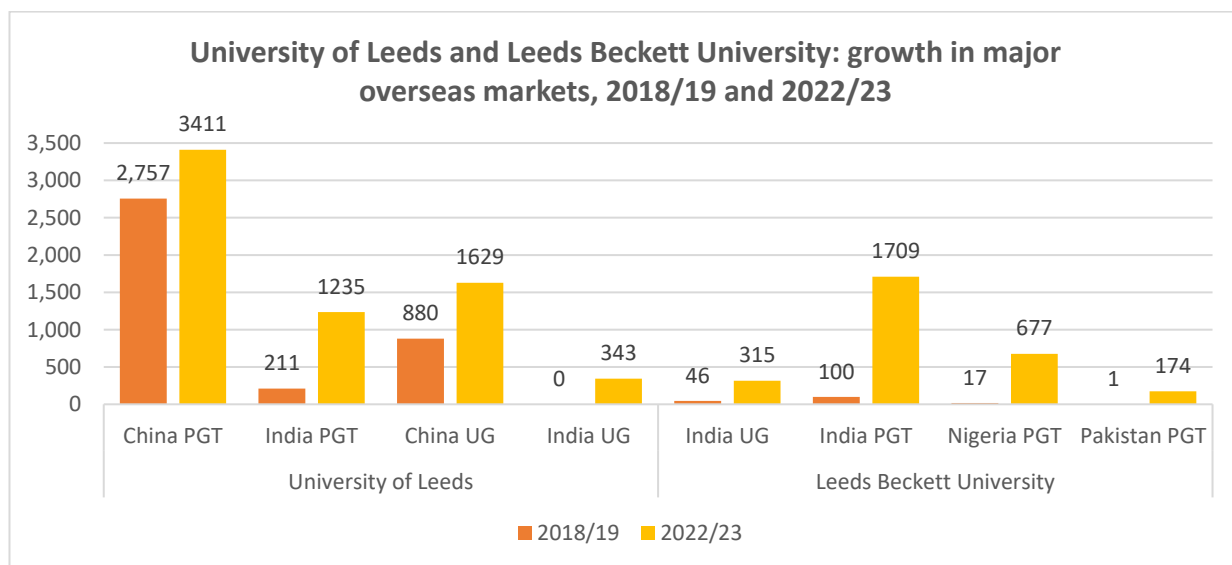
The drivers for these shifts were noted in Section B3.2 of this report. The impact of the changes is:

- to create more uncertainty, for planning purposes, about intake levels, because:
 - as a recruitment stream, international markets are more volatile and less predictable than for UK undergraduates
 - taught postgraduate courses are generally for one year, and cohorts are therefore replaced annually, as opposed to the sustained accommodation need for undergraduate cohorts on overlapping three-/four-year programmes of study
- to erode the traditional model of providing PBSA primarily for incoming Year 1 undergraduates.

Historically, demand was broadly undifferentiated and mechanical: a relatively predictable stream of first-year – predominantly UK – undergraduates were offered, and generally took up, places made available to them by institutions in PBSA configured as cluster flats (or, decreasingly, as corridors in halls). While still dominant, this paradigm is increasingly under threat from the growth of demand from a much more stratified and nuanced pool. PGT and international students are generally older and cover a broader age range. They are culturally diverse and have a wider range of expectations, needs and preferences. Students from overseas are drawn from a wider set of domiciles than they used to be. As institutions diversify their international recruitment base, the range of budget levels available to overseas students to spend on accommodation is significantly broader.

As a planning tool, simple modelling of full-time student demand against PBSA supply is of limited use in the context of this much greater segmentation of demand. In plain terms, *is there enough accommodation to go round?* is not an adequate question.

Figure 28



Source: data supplied by UoL and LBU

Figure 28 gives a more detailed sense of the scale of the burgeoning international student market in Leeds and the speed at which it has grown, particularly for taught postgraduate education. It also shows that, while China remains a strong and growing stream for the University of Leeds, other markets both there and at Leeds Beckett University are quickly emerging to diversify the citywide base for this segment.

It is widely understood in the higher education sector that the socio-economic profile of Chinese students at UK institutions generally reflects more affluent backgrounds and bigger accommodation budgets than for international students from other domiciles. Shifts in international student populations away from China and towards the rapidly emerging alternative domiciles is a strong indication that the balance of PBSA available in Leeds would benefit from a rethink to achieve a better fit:

- fewer new-build studios and high-specification ensuite rooms
- larger numbers of more moderately priced bed spaces in shared accommodation.

D2.2 ***The composition of the PBSA sector in Leeds***¹⁹

D2.2.1 *Setting the scene*

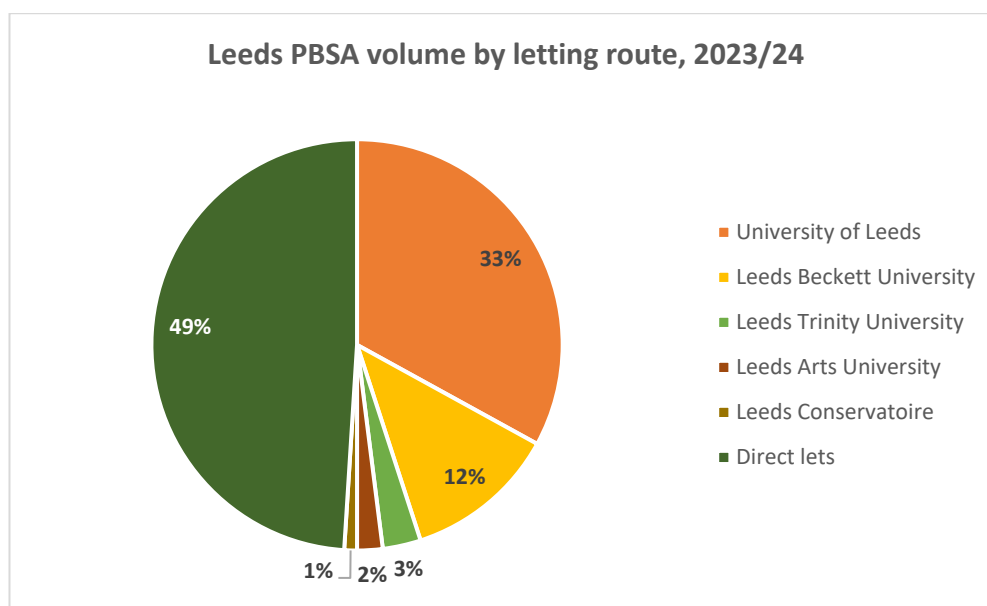
As elsewhere, universities in Leeds are invested in shaping their educational and support services to meet the changing needs of a changing student population. Typically, as a core part of their offer, they give an accommodation guarantee to Year 1 undergraduates and often (a proportion of) international postgraduates. (Returning undergraduates and most domestic postgraduates are expected to find accommodation in the private sector.) By their nature, private PBSA providers have a stronger focus on returning profits and design their products and services to help produce high yields. These different missions are reflected in the accommodation provided.

The rise of mass higher education and the private PBSA sector have been mutually beneficial to both educational and commercial interests. However, the institutional and PBSA sectors are not in perfect alignment. While PBSA investors and developers have targeted the wealthy segments of the student market as a route to optimising financial returns, the needs and budgets of less well-off students have been somewhat overshadowed. The importance of this feature of the PBSA sector is being magnified, as the student profile changes. Because, nationwide, they have relied increasingly on private operators to meet their students' accommodation needs, many universities have, to some extent, ceded control and influence over what gets built.

D2.2.2 *Providers of PBSA and the routes through which it is let*

Figure 29 shows the 2023/24 split of PBSA volume according to the route through which it is let.

Figure 29



Courtesy of Cushman & Wakefield Student Accommodation Tracker

D2.2.2.1 The University of Leeds

The portfolio at the University of Leeds accounts for a third of the PBSA market, and for 2023/24 amounts to some 8,460 bed spaces. These are spread across 20 sites, including eight larger developments on or bordering the campus. The institution owns 57 per cent; the rest is supplied through deals with a number of other providers in Leeds, including Unite, iQ Student and Unipol Student Homes. These deals are a mix of leases and nominations and underwriting agreements, and a mix of medium- and long-term arrangements with break-points to support flexibility. Within the portfolio, 65 per cent of rooms are ensuite; 34 per cent standard (shared bathroom) and one per cent other forms of provision. The balance of the University's portfolio reflects its focus on:

- fulfilling its guarantee to offer first-year accommodation to all full-time Year 1 undergraduates and all international postgraduates, and to offer suitable accommodation to all disabled students for their full study cycle
- maintaining a rent ladder that incorporates a meaningful proportion of affordable rooms
- meeting surveyed student preferences for good-specification, ensuite, self-catered provision close to campus
- competing effectively with the direct-let offer in the private sector
- creating a sub-portfolio of family accommodation to support international student recruitment effectively.

The near absence of studio provision in the portfolio reflects the University's decision to leave this market segment to private providers of PBSA.

To flex the portfolio up, the University of Leeds has the financial capacity to leverage deals with private providers through underwriting risk. (The means of the other four main HE providers in the city do not compare in this regard.) In doing so, however, scope for private sector deals with other institutions in the city diminishes and the direct-let market for student renters shrinks, at least until the pipeline feed picks up.

The University of Leeds reports that it is open to developing new-build PBSA in the medium to long term, given the right funding conditions. This is likely to be done in association with a developer or through a DBFO (Design-Build-Finance-Operate) arrangement.

In the current tight market, the University has voiced a particular concern about returning students being squeezed out of a contracting off-street sector and unable to afford the main alternative of a room in direct-let PBSA.

D2.2.2.2 Leeds Beckett University

Having disposed of its own accommodation, Leeds Beckett University has constructed a portfolio made available through partnering arrangements with private/charitable sector providers. In 2023/24, bed spaces numbered 2,836 from a mixture of long-term leases and short-term nominations arrangements. The bulk of rooms are located in and around the city centre; the rest in Inner North-West Leeds. Their spread reflects the balance of students studying at the city and Headingley campuses (reported as 68:32 per cent).

Shortly due for review, the University's *Student accommodation: a strategy for the residential estate 2019-24* is focused on an '*optimum supply of well-located, high-quality accommodation on competitive terms for our students – both now and in the future*'. Central to the strategy is a guarantee of accommodation for Year 1 undergraduates and overseas students as a competitive edge in student recruitment and to help ensure a safe, comfortable and supported environment for intakes. The document's planning assumptions are now out of date for future strategising:

- On the demand side, the *modest* growth envisaged may give way to stronger growth in the context of the booming international PGT market. The accommodation demand pool under the existing guarantee would expand because of the higher volume of overseas students (although signs for 2023/24 are that this may have levelled off)
- On the supply side, the '*healthy supply of accommodation in the city centre*' and good prospects for growth noted in the strategy no longer apply. This means that the University will wish to review its earlier conclusion that it '*will [over the course of the 2019-25 planning horizon] be in a position to rely on third-party partnering arrangements to meet a significant element (if not all) of its demand for the city campus*'.

The primary risk for Leeds Beckett University is the challenge of securing sufficient additional bed spaces in its portfolio to meet growing demand in a market environment where suitable direct-let provision in the city centre is likely to become less readily available as a source of bought-in provision.

D2.2.2.3 Leeds Trinity University

Leeds Trinity University runs a portfolio of its own accommodation across seven on-campus buildings, providing 777 bed spaces in 2022/23. This number fell to 688 in 2023/24 following the repurposing of St Albans and Ripon Halls as office space. The University reports that it avails itself of year-to-year deals with private providers to supplement its portfolio in very small numbers. Otherwise, it is reliant on students securing accommodation in the off-street and direct-let PBSA sectors or studying from their own/parental home. Although it is based in Horsforth, Leeds 18, the University reports that most of its students find somewhere to live in the traditional student areas in

Inner North-West Leeds. Contraction of the off-street sector in INWL is therefore a leading risk for the institution.

As part of growth plans under its strategic plan, the University is committed to opening a new campus in the city centre (Trevelyan Square) for the start of the 2024/25 academic year. Anticipated student numbers attending the new site are currently undisclosed, but it is understood that these are unlikely to make a significant difference to the number of students living in the city centre. The University has confirmed that Horsforth will remain its primary place of study.

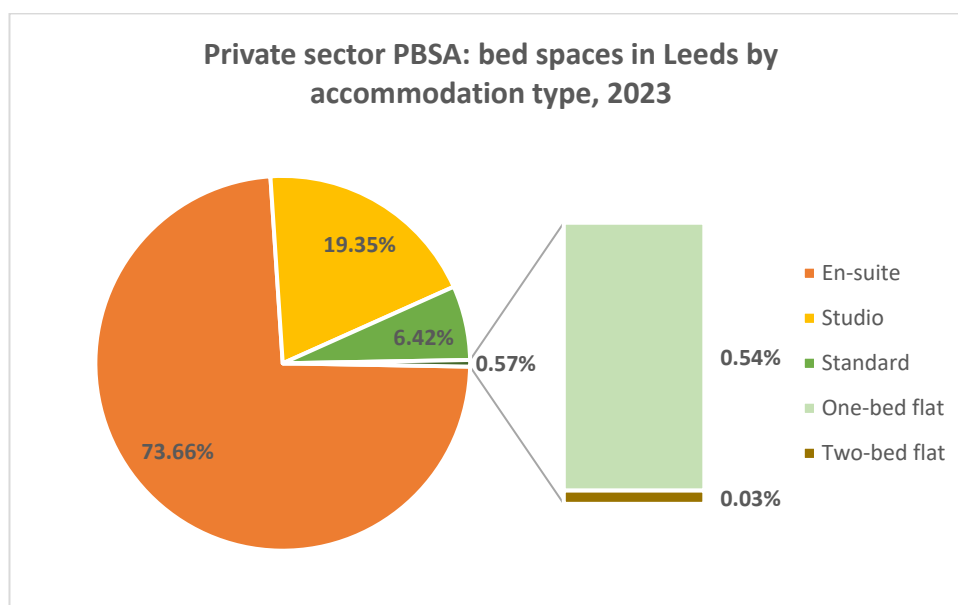
D2.2.2.4 PBSA direct-lets

Direct-let rooms form just under half of the PBSA in Leeds (49 per cent). They serve as a purpose-built alternative to accommodation offered by the institutions. Much, but not all, of this provision offers higher specification and amenity levels with higher rents attached. It has an important role to play in serving the market for a range of returning and new students, many with higher budgets.

For the universities, they are competition, but also a repository of supply to expand institutional portfolios in support of accommodation guarantees and recruitment efforts.

D2.2.3 PBSA by accommodation type

Figure 30



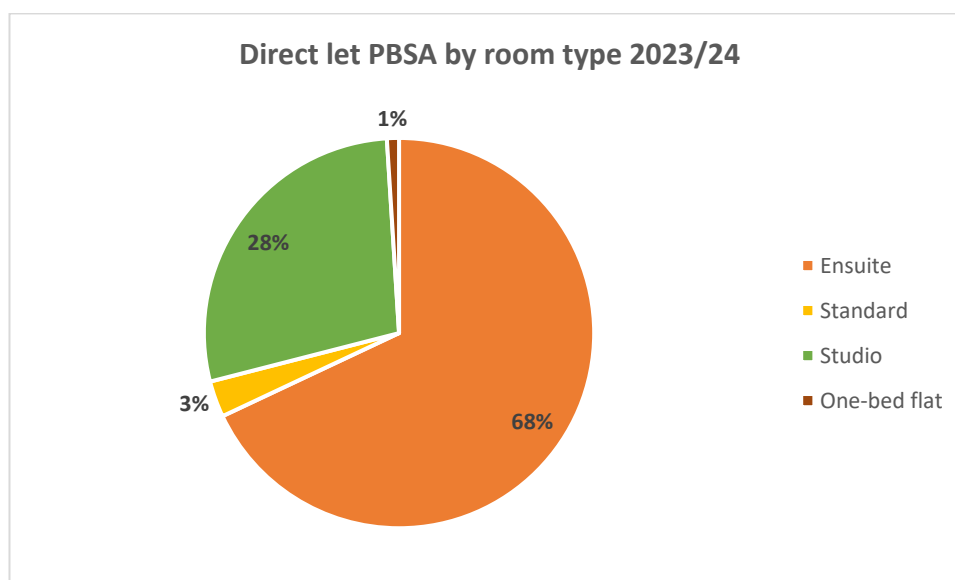
Source: Cushman & Wakefield Student Accommodation Tracker

The profile of private PBSA in Leeds by accommodation type is radically different from the portfolio profiles for the local institutions. While a fifth of private PBSA stock is configured as studio apartments, this type of accommodation does not feature in the portfolios of the University of Leeds or Leeds Beckett University. Furthermore, the private sector has generally shunned standard (shared bathroom) accommodation in its pursuit of higher specification levels for higher rents. (This has succeeded in effecting a significant shift in preferences among students – and their parents.) Standard rooms account for 34 per cent of accommodation offered by the University of Leeds, but just three per cent of the direct-let private sector base. The differences tell of different histories and priorities: the private sector offer has been shaped by maximising investment yield for new-build per

square metre; for the universities, often with a proportion of older stock, importance continues to be attached to affordability for their students. These contrasts reflect the reality that the private sector and the universities have been serving different, albeit significantly overlapping markets.

Figure 31 sets out how direct-let private PBSA breaks down by room type. Studio flats account for more than a quarter of bed spaces (28 per cent). Although they meet a market need, their occupancy rate is unknown (although searches on current listings have yielded some limited evidence of material void numbers). If returning students are displaced from a stalling off-street sector and their institution is unable to offer them a place, a sizeable chunk of the direct-let market will be off-limits for many of them partly because studios do not offer a shared living experience popular among returners, but more critically because it is unaffordable for them. Additionally, an unquantified but substantial proportion of ensuite rooms in this sector have a high specification/amenity level with high price tags also beyond the means of many students.

Figure 31



Source: Cushman & Wakefield Student Accommodation Tracker

If overall demand grows through higher student intakes and supply in the off-street private rented sector remains static or is not available to students, direct-let stock will become more important as a source of supply. The types of room available within this supply base are therefore of particular interest.

D3 Private rented sector

The off-street private rented sector in Leeds is a complex and fluid market, where:

- a significant proportion of landlords do not engage with statutory agencies, so that their numbers – and their stock volume – are not fully known
- student renters compete for lets with other rental groups whose presence in the market ebbs and flows according to shifting economic and social conditions.

For these reasons, quantification and analysis of supply and demand in the PRS are most effectively approached through available data on student occupancy (Section F).

D3.1 ***Insights provided by local housing professionals***

Additional insights into the private rented sector in the city have been provided by active stakeholders for the purposes of this research. These include senior housing professionals at Leeds City Council and working landlords. The narrative that follows is a synthesis of perspectives given at interview.

Across Leeds, demand for rented accommodation exceeds supply. Securing increased supply to meet rising demand from students and young working people is challenging in the context of the constraints imposed by the Article 4 Directions (see Section C3.2) and unfavourable borrowing conditions.

The sector is increasingly catering for the needs of people under 30. A growing number of households have been turning to private rented housing to meet their housing needs in the absence of other affordable and accessible alternatives. The private rented sector also provides for low income and vulnerable groups. Specific issues have been emerging around accommodation for asylum seekers and refugees. Local Housing Allowance levels are in need of review because they have been largely outstripped by big rent increases. The effect has been to squeeze many on low incomes and in vulnerable groups out of the sector.

Inner North-West Leeds is still the main locus of private rented housing aimed at students, but there may have been some limited spread to areas bordering the city centre to the east and south. Demand among students is stronger in areas closer to their places of study. Hyde Park, Woodhouse and other areas close to campus remain the main areas of choice for students, although there is still demand for shared housing in and around Headingley.

Migration of some student demand away from central Headingley towards Hyde Park and the city centre is making way for more young working households renting shared flats and houses in the area. Headingley has become a dual market, catering for demand from both young working people and students. Student demand in Far Headingley, Beckett Park, Weetwood and the Meanwood/Headingley border areas is reported to have diminished, but demand appears steady from young working people. Burley and Kirkstall have become more popular for young working people. Students will also consider lettings in Burley and to a lesser extent Kirkstall.

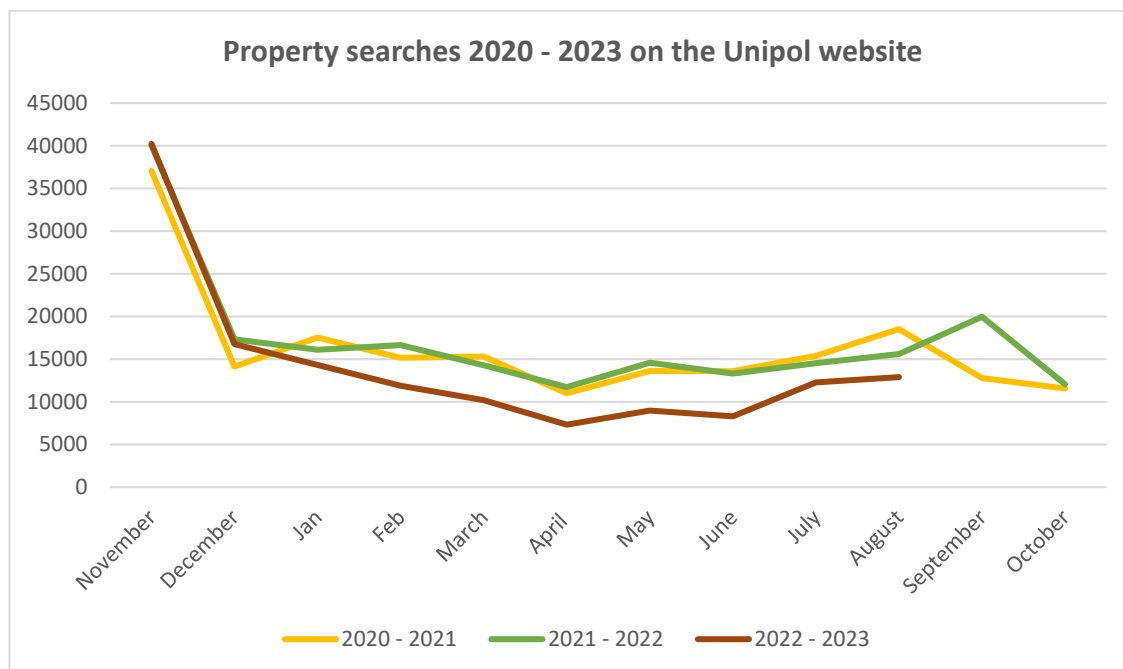
Rented housing standards in INWL are generally better than in other parts of the city, as a result of effective self-regulation channelled through successful accreditation schemes; high consumer expectations; and an awareness among student landlords of the need to compete with the PBSA offer.

Observations made by landlords and local authority housing professionals triangulate strongly with the analysis of Census data (Section C1) and of student address data (Section F).

D3.2 ***Letting trends***

There is some evidence that increasing demand is fuelling faster and earlier letting activity among students. The Unipol website starts displaying adverts for the following academic cycle in mid-November each year. Website activity is increasing around this point year on year. As of 12 October 2023, some landlords and websites had already begun advertising properties for the 2024/25 letting year, reflecting and in some ways precipitating the rush to find a home. The rising urgency among students to secure future accommodation is indicative of a tight – and tightening – market.

Figure 32



D4 In summary

Between 2013/14 and 2022/23, there were an additional 9,533 students studying in Leeds (+18.8 per cent), compared to PBSA expansion of 7,815 (+43 per cent) over the same period. It is difficult to say with absolute certainty whether there is a mismatch in demand and supply in the student market, particularly as the amount of off-street housing available to students is hard to quantify. However, as of October 2023, there were no reported instances of students being unable to find housing in Leeds. On the basis of the main student property listings available online, there appeared to be rooms still available for the current year. It is possible to say with reasonable confidence that in the 2023/24 academic year, there is an adequate but tight supply of student housing, with a very limited surplus.

In the longer term, student number growth is anticipated and there would appear to be enough new PBSA beds in development with more in the pipeline to accommodate the level of extra demand. Section F explores in more detail the distribution of students across the different sectors of the housing market within and outside Leeds, and considers the suitability of PBSA to meet future demand.

E RENT

E1 Purpose-built student accommodation

Figure 33 provides a comparison of weighted average annual rents across both provider and PBSA room types for 2023/24. Overall, on average, a direct-let in the private sector is getting on for two-fifths more expensive than in an institutional portfolio. In part at least, this gap can be accounted for by:

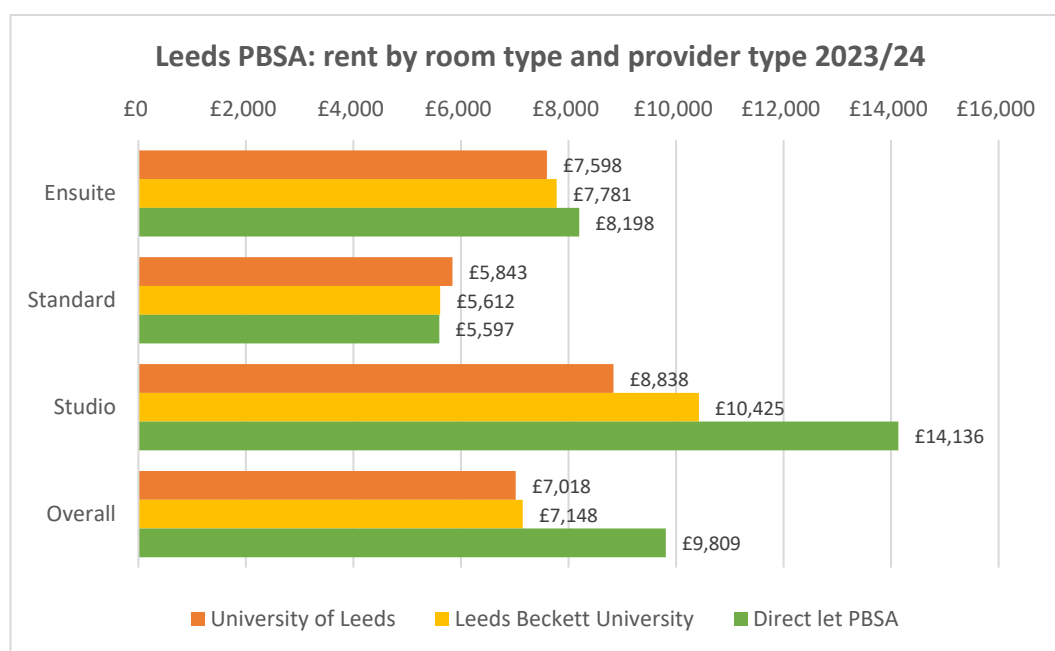
- property age and specification/amenity level
- the high level of studio provision in the private sector
- the private sector bearing higher financial risk, as institutions increasingly rely on them
- their differential missions and market positioning.

Consideration of maximising returns in the private sector and pressure to offer a proportion of more affordable rooms in university accommodation also play their part.

In 2023/24, the average rent for a studio in the direct-let market is £14,136 a year. On a typical 51-week let, this works out at £277 a week. This is one of the standout findings of this research. Studios currently make up over a quarter of the direct-let market (28 per cent), but will be beyond the means of many students.

For a more in-depth analysis of rents and affordability issues in PBSA, see the Unipol Accommodation Costs Survey.²⁰

Figure 33

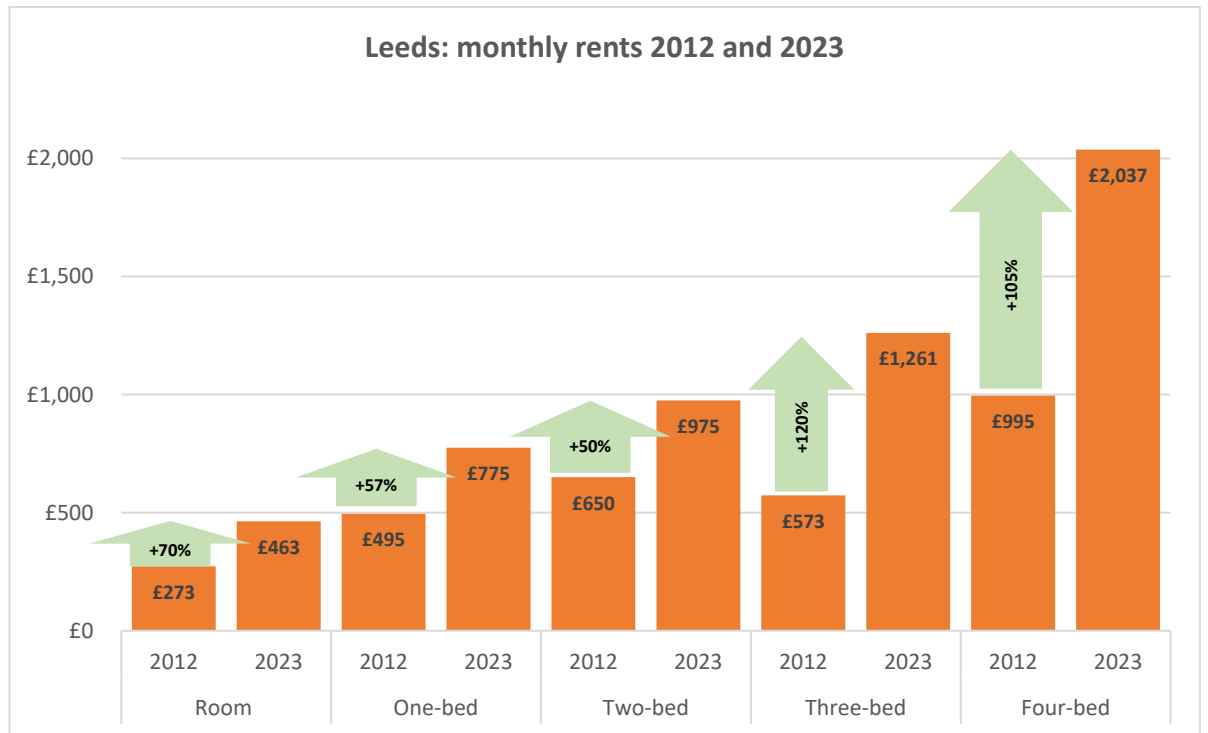


Courtesy of Cushman & Wakefield Student Accommodation Tracker

E2 The off-street sector

For Leeds as a whole, rent for off-street properties in Leeds increased substantially between 2012 and 2023, up from an average of £843 to £1200 (+42.3 per cent) (Figure 34 and Appendix 3e). Rents for properties with three bedrooms or more have more than doubled, possibly reflecting increased demand across the period for larger houses to share.

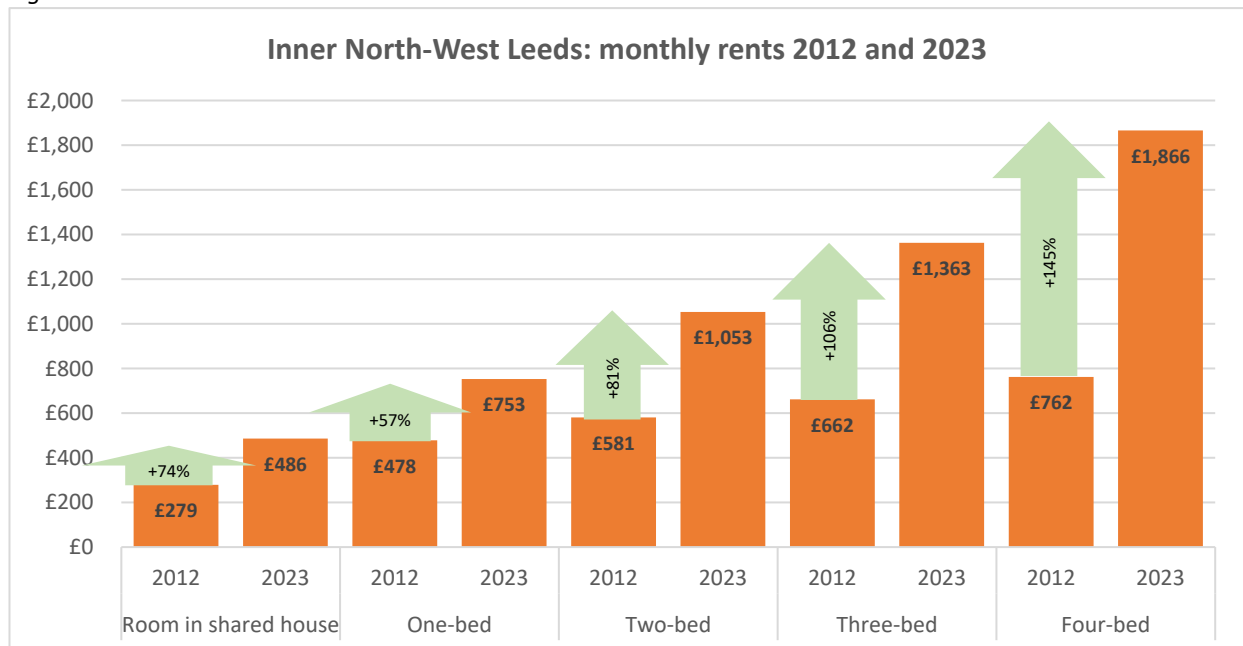
Figure 34



Source: www.home.co.uk/www.rightmove.co.uk - May/June 2023

Rents in Inner North-West Leeds have increased by significantly more than for the city as a whole (Figure 35 and Appendix 3e). Average rents increased from £489 per month in 2012 to £1,107 in 2023 (+127 per cent). A key driver for the stronger overall increase in INWL has been a big rise for larger properties, as increasing house prices and demand from students, investors and owner-occupiers has fed through into higher rents.

Figure 35

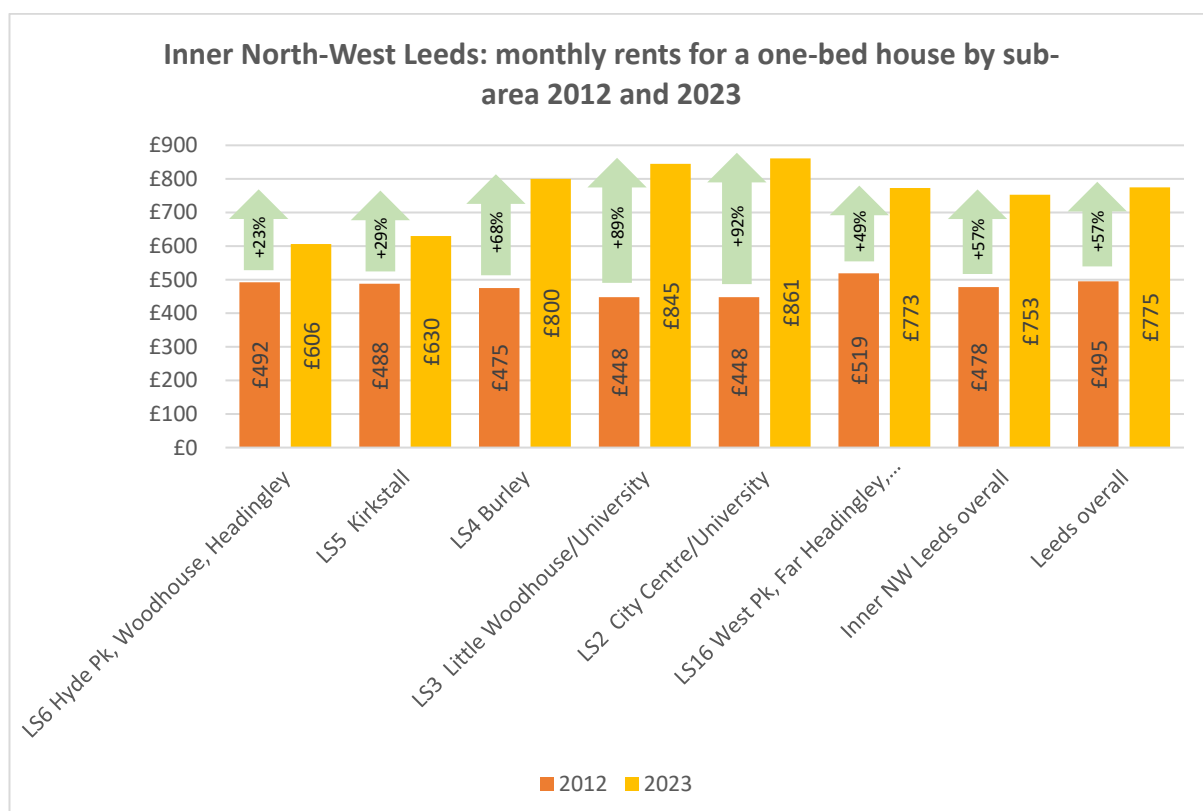


Source: www.home.co.uk/www.rightmove.co.uk - May/June 2023

Figures 36a-c (and Appendix 3e) show the extent to which rents have risen between 2012 and 2023 within the sub-areas that make up Inner North-West Leeds and according to the main types of let. This analysis is based on 589 advertised lettings on Rightmove, 2 and 3 June 2023.²¹ Rents for rooms in shared houses were higher than the city average in all parts of INWL.

For one-bed house and flats, rents in areas closest to the city centre and campuses have increased most significantly, nearly doubling in a decade. Rents in other areas have stayed closer to the Leeds average. Charts for two- and three-bed houses are not included here but follow a similar pattern.

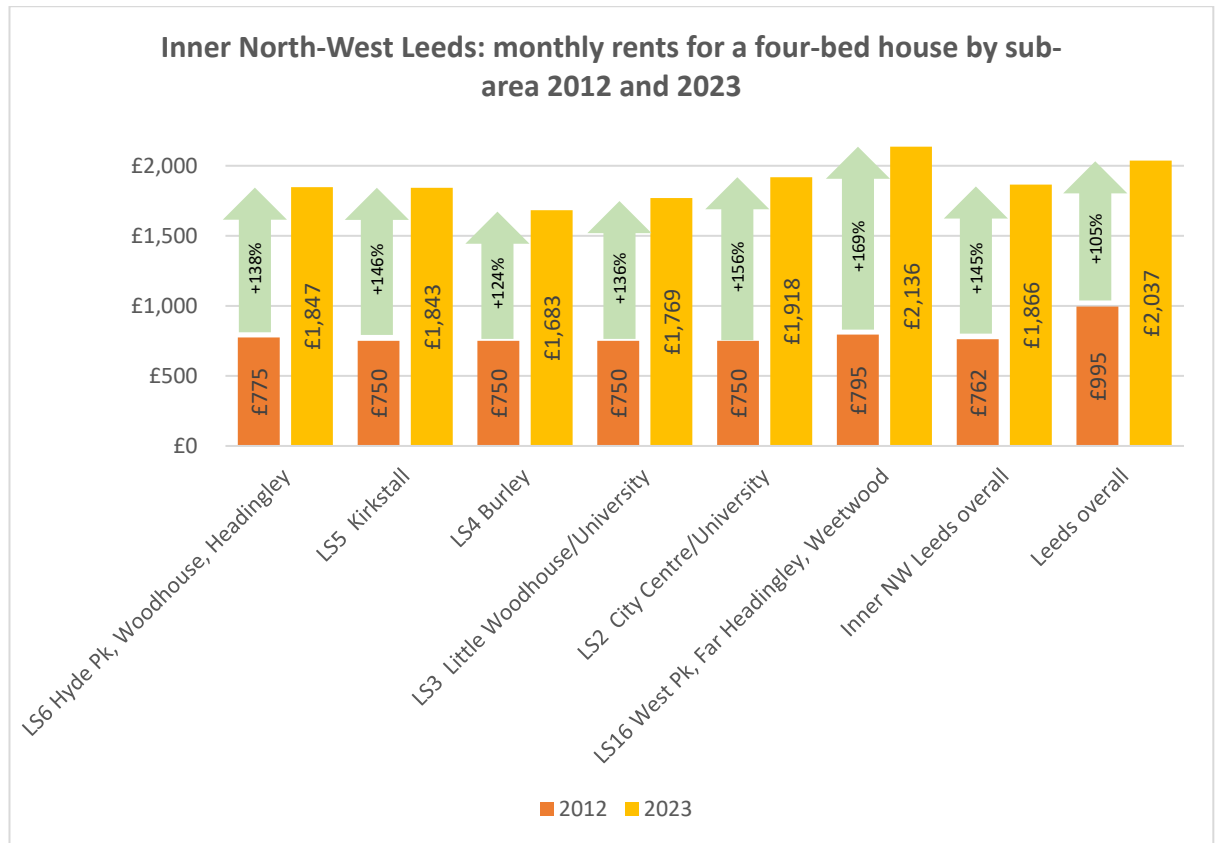
Figure 36a



Source: www.home.co.uk/www.rightmove.co.uk - May/June 2023

In all areas of INWL, rents for four-bed and larger houses are more expensive than for the rest of Leeds, and increasing more quickly than elsewhere in the city. These are likely being fuelled by growing demand for larger properties among groups of sharers, but also among families reliant on the private rented sector.

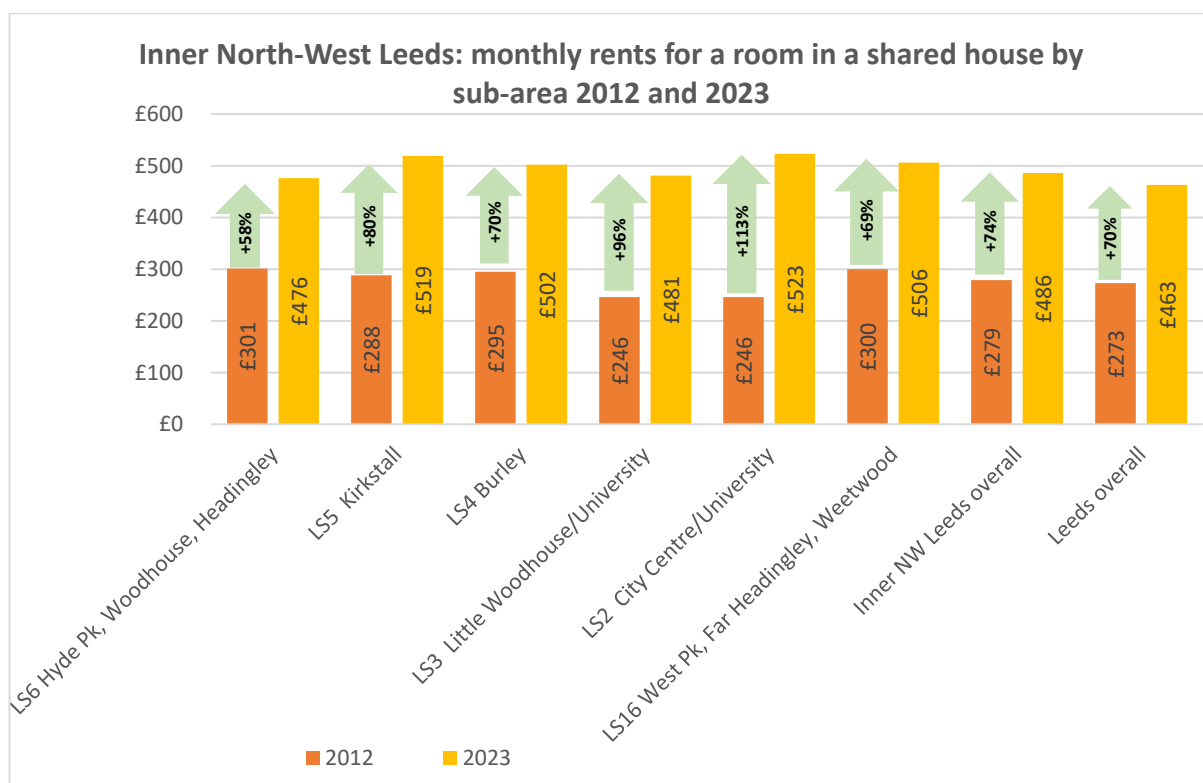
Figure 36b



Source: www.home.co.uk/www.rightmove.co.uk - May/June 2023

In 2023/24, the average rent for a room in a shared house in INWL was £486 a month, as against a Leeds average of £463. Areas closest to the city centre and therefore within a short walk of the universities and employment opportunities were markedly more expensive: average rents stood at £523 a month, up 113 per cent on 2012 in the city centre/University area (LS2) and at £481 (+96 per cent) in Little Woodhouse/University area (LS3).

Figure 36c



Source: www.home.co.uk/www.rightmove.co.uk - May/June 2023

According to landlords interviewed for this research, a substantial majority of properties are let on a bills-inclusive basis; many are advertised showing rent levels with and without a bills component to give prospective tenants choice; and most students and young workers expect bills to be included. The growing trend for wrapped-in bills over the past decade is likely to have contributed to rent increases since 2012, when this type of arrangement was comparatively rare.

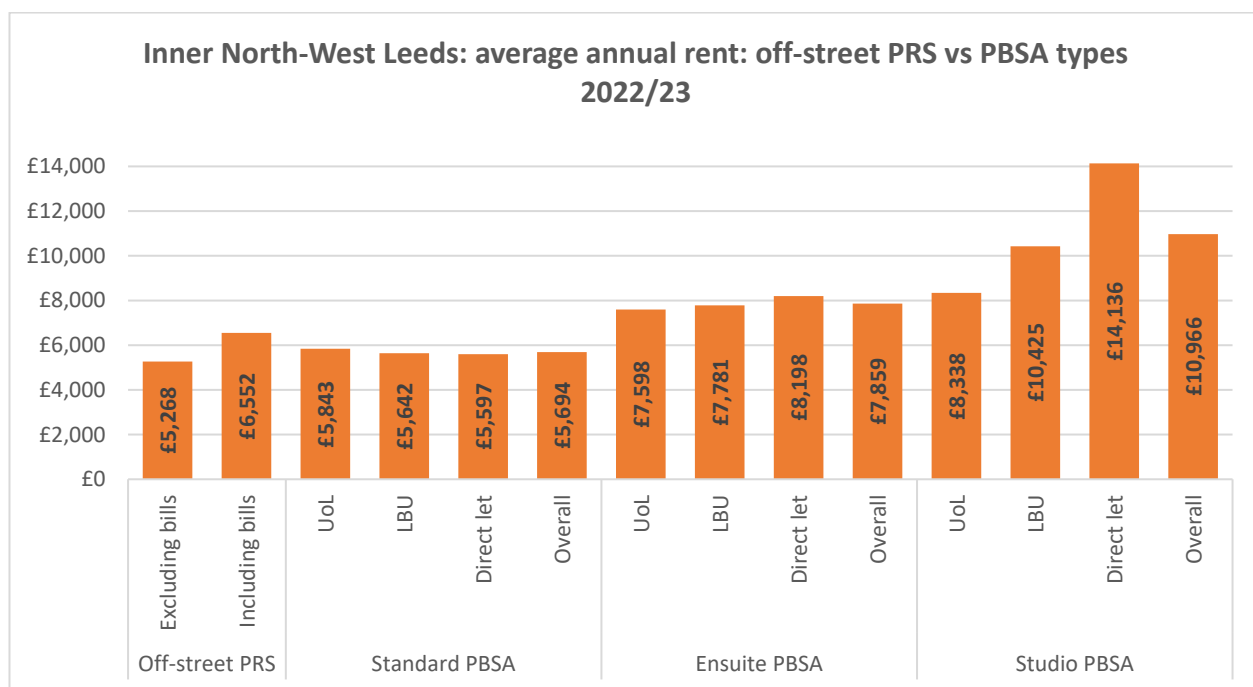
In 2023, the average rent without bills was £439 per month, while the average rent including bills was £546 per month (see Appendix 3f for detail). On average, the difference between rents including and excluding rents was £107 per month or £24.69 per week.

E3 Comparison of rents in the PBSA and off-street sectors

Figure 37 shows the average annual rents in 2023/24 across the main provider and accommodation types. As a key point of comparison, average rent for PBSA direct-lets was 1,646 more expensive in 2023/24 than for bills-inclusive rent in the off-street sector (+25.1 per cent). If the off-street sector shrinks, this price differential will become particularly important, as returning undergraduates weigh their two main options and their affordability. In 2022/23, 20,355 students lived in the off-street sector (see Section F1.1.2), representing 38.4 per cent of the combined full-time student populations of the University of Leeds and Leeds Beckett University, so supply volume in this market segment is a key to overall housing affordability. (While, perhaps surprisingly, a standard room in direct-let PBSA was £955 or 14.6 per cent cheaper than a room in an off-street property (bills included), it should be remembered that this accommodation type in the

direct-let PBSA sector is something of a rarity and, for this reason, the comparison is of limited value.)

Figure 37

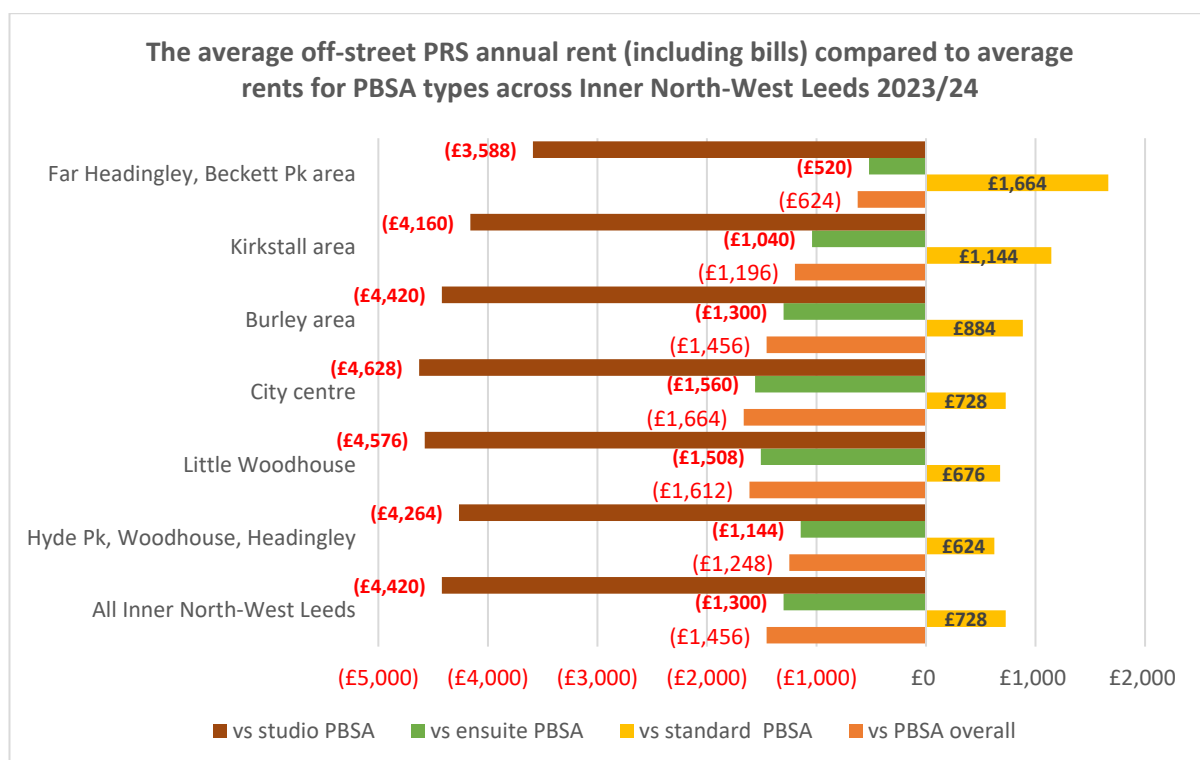


Source: www.rightmove.co.uk/UNIPOL and Cushman & Wakefield Student Accommodation Tracker)

Using the average rent for a room in an off-street shared student house as the base value, Figure 38 gives a more granular analysis of these differences by sub-areas within Inner North-West Leeds. (See Appendices 5a to 5d for a detailed analysis.)

Compared to a room in an off-street house, average annual rents in PBSA studio flats are between £3,588 (Far Headingley/Beckett Park) and £4,638 (city centre) more expensive. For ensuite PBSA rooms, average annual rents range from £520 *per annum* (Far Headingley/Beckett Park) to £1,664 (city Centre) more expensive. These figures demonstrate the relative cheapness of the off-street sector.

Figure 38



Source: www.rightmove.co.uk June 2023// Unipol rent data 2011 and Cushman & Wakefield Student Accommodation Tracker)

As a footnote here, it is worth noting that, where demand for properties is high, some landlords of off-street properties are reported as inviting prospective tenants to offer rent beyond the advertised price. Counter-bidding can lead to significant escalation. This emerging trend is largely confined to properties aimed at young working/professional people, but also properties in the dual market.²²

Figure 39a and 39b compare average rents between 2011/12 and 2023/24 in room types of particular interest for returning students and students entering the market late in the letting cycle and/or not covered by an institutional accommodation guarantee. It is perhaps surprising that rent for a room in a shared house (bills included) has overtaken rent for a standard PBSA room so decisively over the period. The headline finding here though is the narrowing of the rent gap between living in a shared house and directly letting an ensuite room in PBSA: in 2011/12, the average rent for a room in a shared house was 60 per cent of the average price of a direct-let room in PBSA; by 2023/24, the proportion had grown to 78 per cent.

Figure 39a

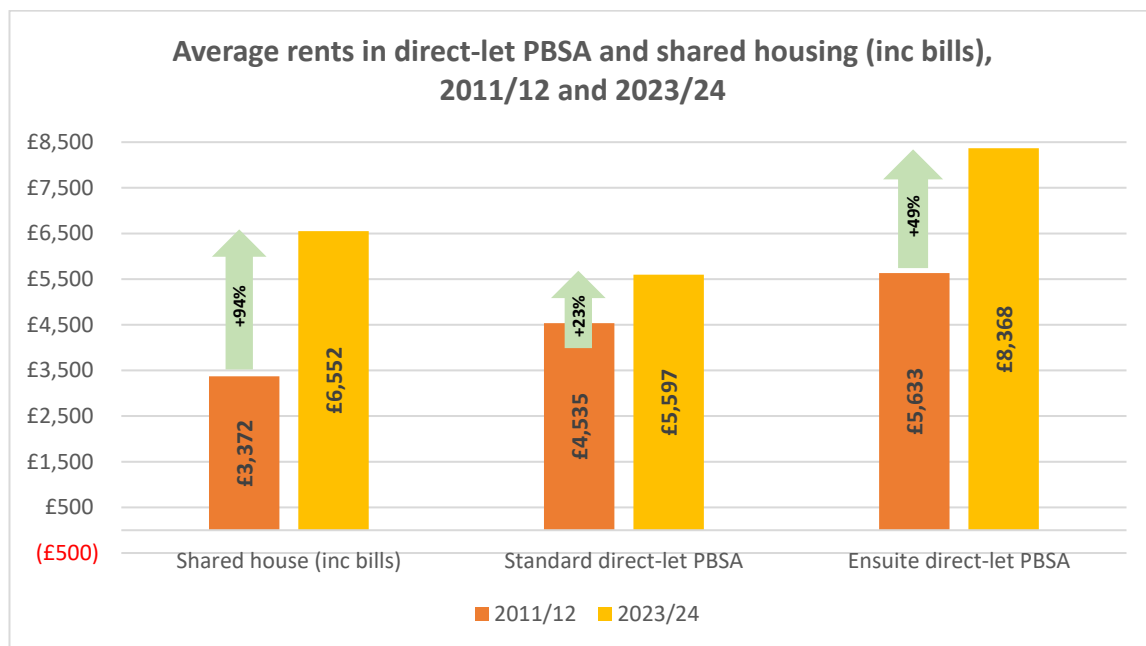
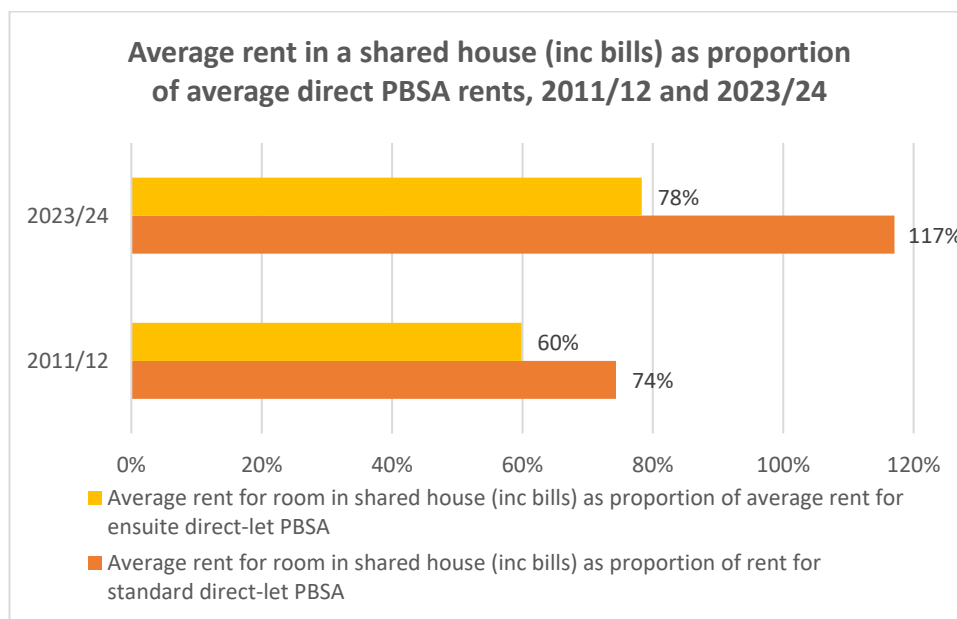


Figure 39b



E4 Affordability

Affordability is a complex set of issues. It is not an absolute concept; it is always affordability *for* someone or some group. It is not possible to assess affordability for people who aspire to higher education but are prevented from entering in consequence of the maintenance costs being prohibitively expensive for them – these numbers are unknown. Nor is it legitimate to use occupancy levels as an index of affordability – this is a measure of market balance and disregards the volume of frustrated aspirants. Change in the number of student commuters over time may provide some insight into affordability levels. However, this section confines itself to measuring rent levels against student loans.

It is important to note here that government has never intended to set available loan level rates to meet full maintenance costs. Instead, loans should be treated as *a contribution to*

living expenses. This fact continues to be poorly advertised by the Government and therefore poorly understood by consumers.

Figure 40 sets out:

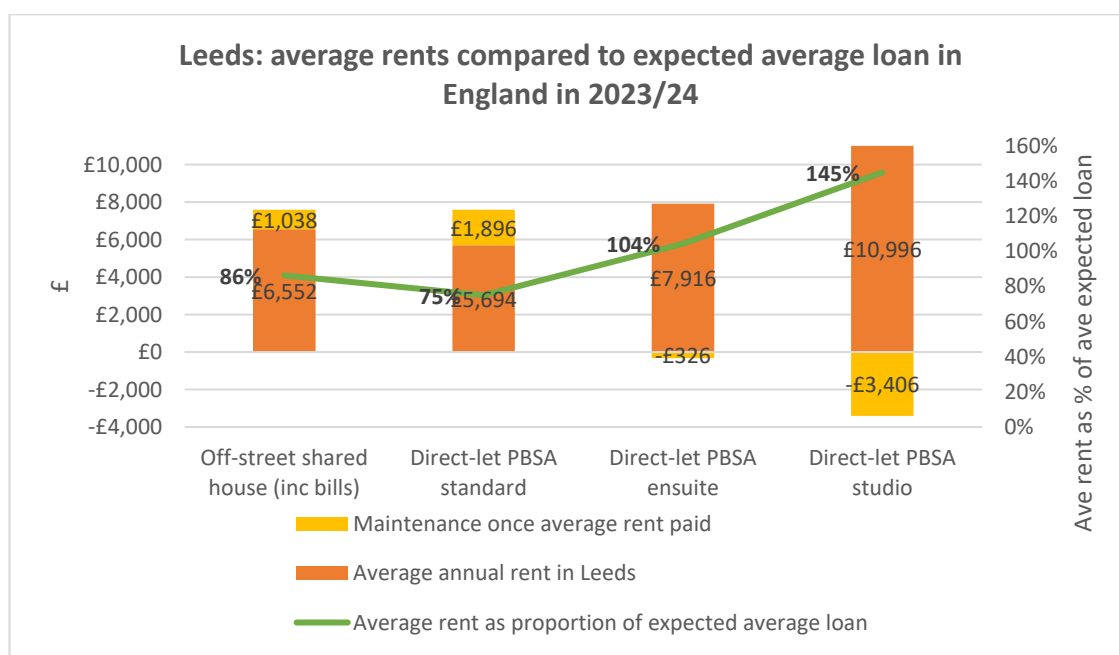
- average annual rents by major room type in Leeds in 2023/24
- maintenance funds left over once rent has been paid, based on the average loan the Office for National Statistics expects students to take out in 2023/24²³
- the proportion of an average loan taken up by average rent according to room type.

To put these figures in context, the ONS reports that, in 2021, *private renters on a median household income could expect to spend 26 per cent of their income on a median-priced rented home in England*. The ONS goes on to *deem a property ‘affordable’ if a household would spend the equivalent of 30 per cent or less of their income on rent (for new or existing tenancies)*.²⁴

In Leeds, on average, an ensuite room in a direct-let PBSA development cost a student £326 more than the value of their loan in 2023/24. This represents 104 per cent of their loan. The cheaper options of standard PBSA and a room in a shared house do not account for all the average loan. However, the remaining funds – £1,896 and £1,038 respectively – are substantially inadequate to meet other living costs: on the basis of 40 weeks’ attendance, this leaves students in standard PBSA with £47.40 a week and students in a shared house with £25.95.

It is clear that significant supplementary income is required to fund full-time students with a residential need through their study lifecycle. Typically, the difference is made up by income from part-time work and/or reliance on family resources. At the time of writing, household income for many families was under additional pressure from the cost-of-living crisis. It is well-documented that regular paid work is rapidly becoming a necessary fixture for many students and, where they do need to work, students are finding it necessary to take on more hours per week – with consequences for their mental health and academic performance.²⁵

Figure 40



Comparison with the position in 2011/12 is not reported here, because a qualitatively different student maintenance regime applied at that time.

F WHERE STUDENTS LIVE: ANALYSIS OF STUDENT ADDRESS DATA

F1 University of Leeds and Leeds Beckett University in 2023

F1.1 Overall student numbers

Student address data for 2022/23 – and for the 2012 iteration of this exercise – have been supplied by the University of Leeds and Leeds Beckett University for the purposes of this research. Leeds Trinity University declined to provide this information, citing stretched resources. Although they were invited to participate, Leeds Arts University and Leeds Conservatoire made no contact. Of the total citywide Leeds-based, full-time student population, the combined relevant student numbers of University of Leeds and Leeds Beckett University account for approximately 90 per cent.

In respect of student numbers living in PBSA and total PBSA volume, data gaps between findings recorded in this section and Section D can be largely accounted for by PBSA residents studying at Leeds Trinity University, Leeds Arts University, Leeds Conservatoire and the University of Law – around 2,000. Voids aside, the balance will have been made up by small numbers from a range of other sources. These include:

- Leeds City College
- Leeds College of Building
- English language schools
- feeder colleges to the universities
- students attending an institution outside Leeds, often displaced from their university town/city by a heavily under-supplied market (e.g, York)
- some non-students.

For further information on student address data and their analysis, see Appendix 1.

Figure 41

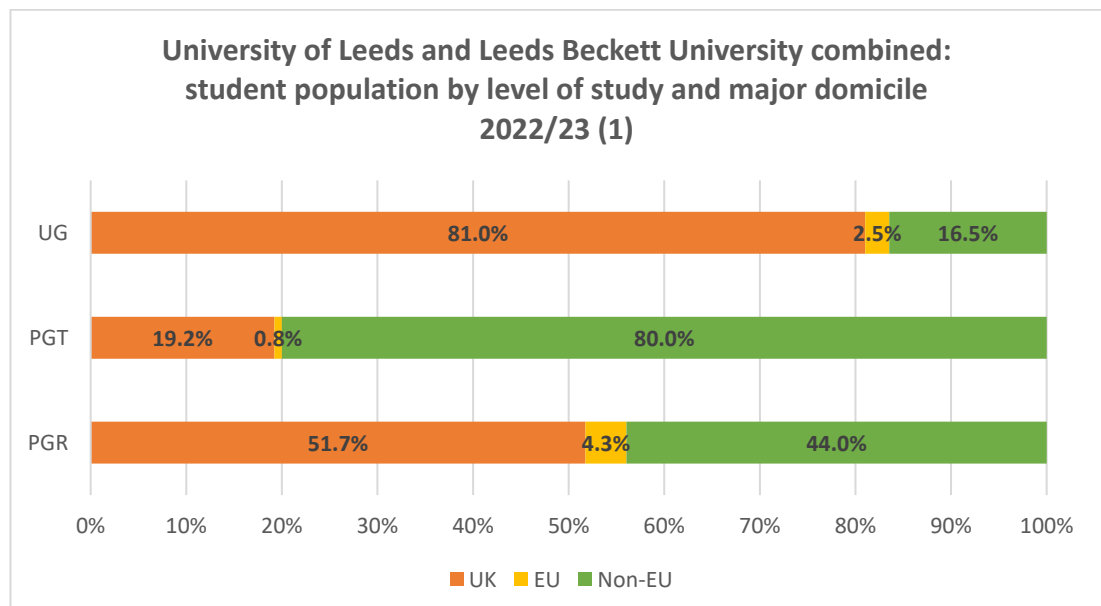
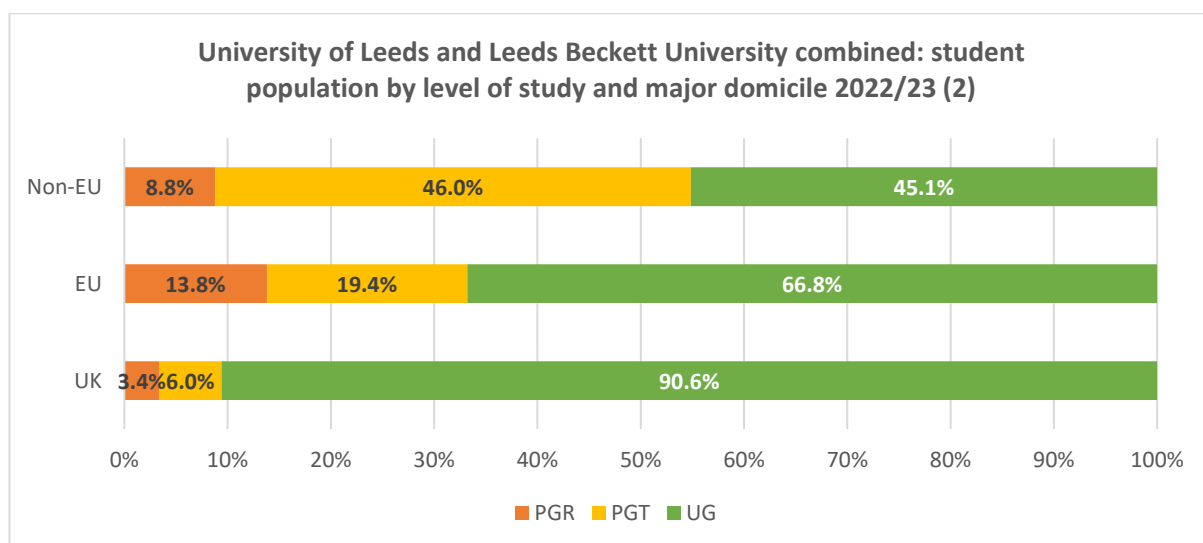


Figure 42



According to student address data supplied by the institutions, a combined total of 53,007 full-time students at the University of Leeds and Leeds Beckett University were actively studying in the city in the 2022/23 academic year.²⁶ This compares to 49,630 students in 2018/19 and 47,942 students in 2011/12. The 2022/23 figure represents an increase of 3,377 (or 6.8 per cent) on 2018/19, and of 5,065 students (or 10.6 per cent) on 2011/12.

F1.2 **Full-time student populations by term-time accommodation type**

F1.2.1 **Overall**

Figures 43a and 43b set out the distribution of the 2022/23 full-time student populations of the University of Leeds and Leeds Beckett University across the main accommodation types used by the higher education sector, with the addition of indices to show numbers living outside Leeds and students living in apartments in the city centre’s general rented market. (See also Appendices 6d to 6f.)

Between them, the PBSA and off-street private rented sectors accounted for nearly four-fifths of student homes in 2022/23: 42.2 per cent rented off-street properties in local communities; and 37.3 per cent had a bed space in PBSA. Completing the picture, 15.3 per cent commuted to their place of study from outside Leeds and 5.2 per cent lived in their own or parental home.

Of the students living in Leeds (44,886), 44 per cent lived in PBSA; just over half (51 per cent) were in private rented accommodation or their own home; and five per cent lived in their parental home.

Figure 43a

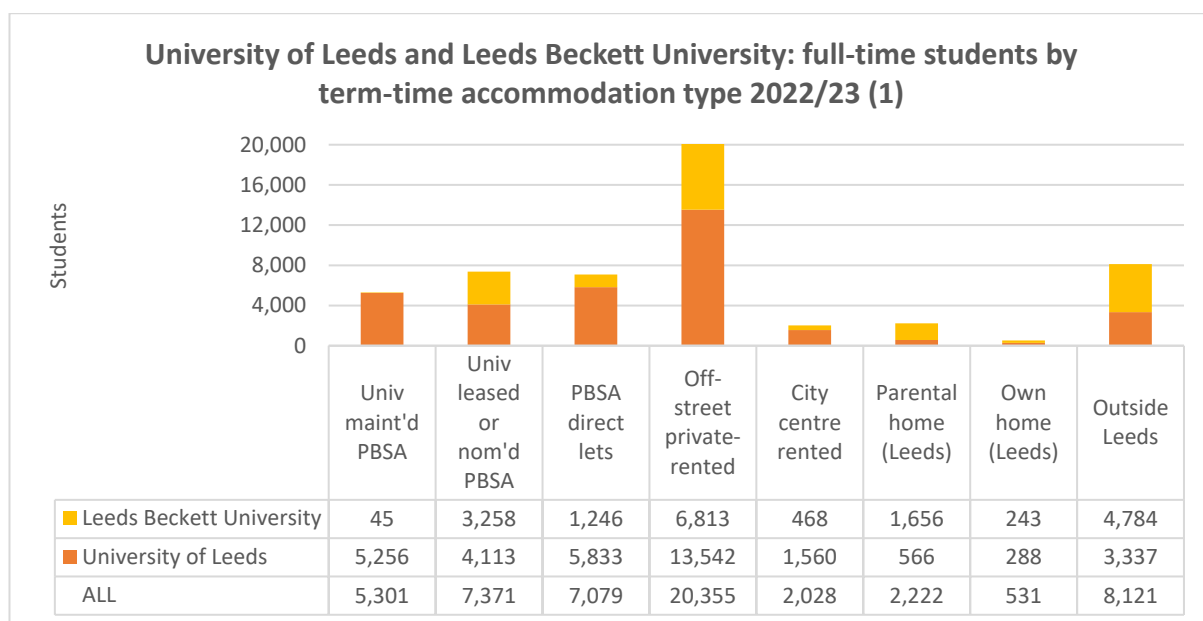
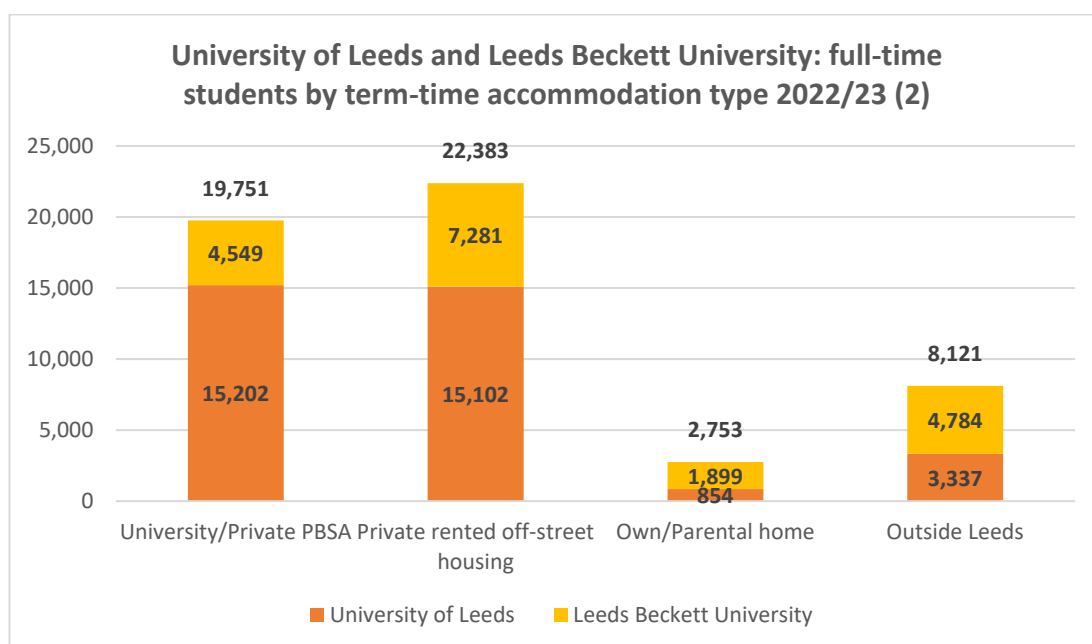


Figure 43b

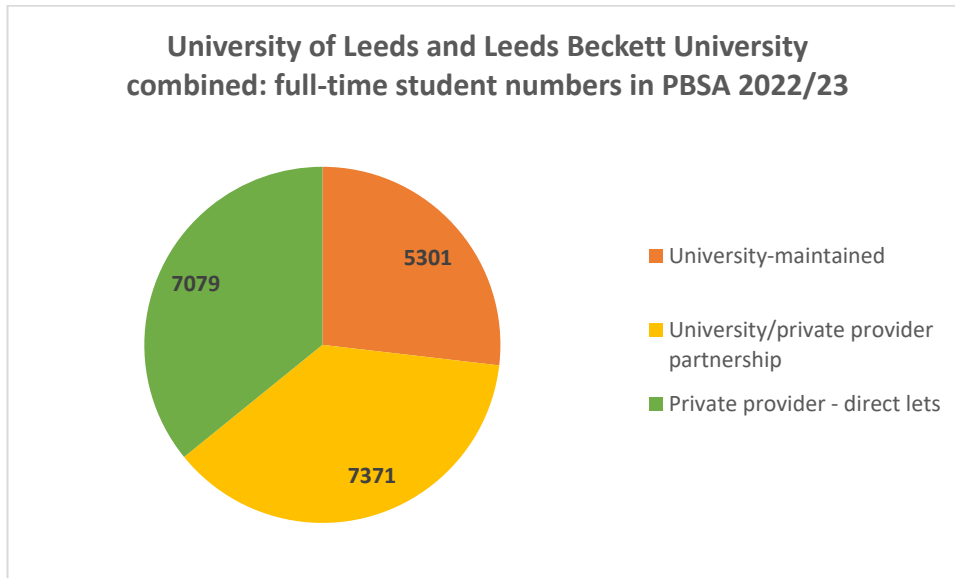


F1.2.2 Students living in PBSA

In 2022/23, over a third (37.3 per cent) of the combined full-time student populations of the two universities were housed in PBSA.

Nearly a quarter (23.9 per cent) of all full-time students secured a room in PBSA through their institution’s application and allocation processes. Of these, ten per cent were placed directly into university-maintained properties. The other 13.9 per cent were allocated to PBSA run by partner providers in the private/charitable sectors. A further 13.4 per cent signed up directly with private/charitable PBSA providers.

Figure 44

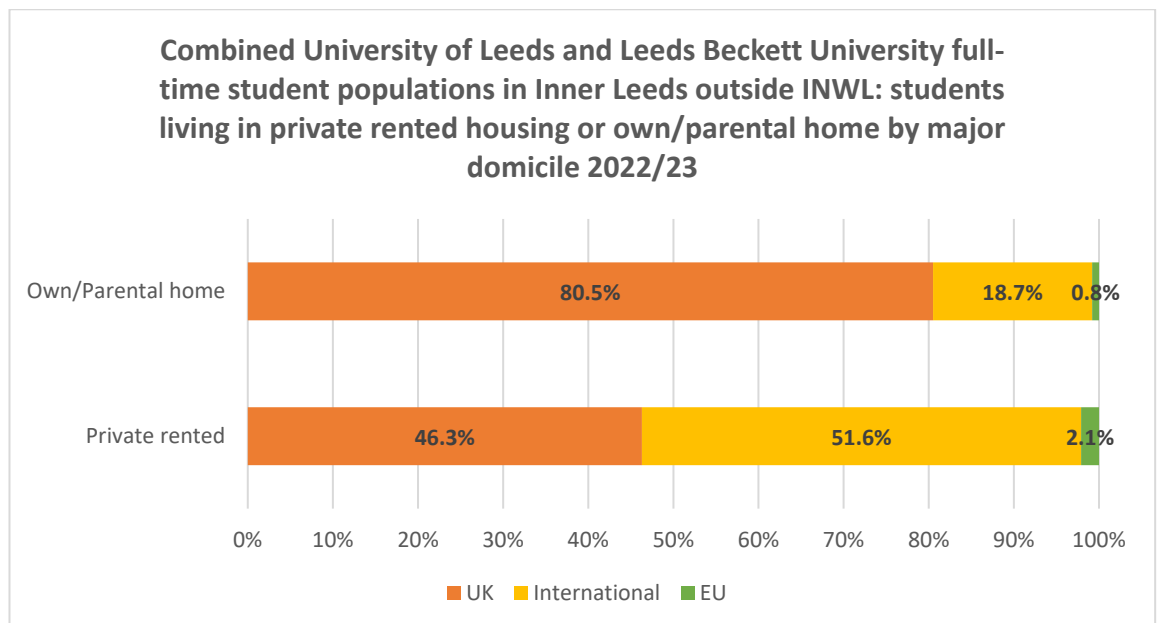


F1.2.3 *Students living in private rented accommodation*

In 2022/23, 22,383 full-time students lived in private rented accommodation in Leeds. (For the avoidance of doubt, this does not include PBSA.) Of these, 20,355 were housed in off-street properties in residential areas, and 2,028 were in private rented apartments in the city centre. Of the students living in private rented accommodation in the general residential community, 1,053 were in inner areas of Leeds outside Inner North-West Leeds. (See also Appendix 6v and 6w.) Of these, 56 per cent were from overseas. This may indicate that, for these students:

- PBSA and the traditional student areas were too expensive and/or
- they were able to take advantage of family connections and find accommodation with or through relatives, themselves living in housing located outside the traditional student areas.

Figure 45



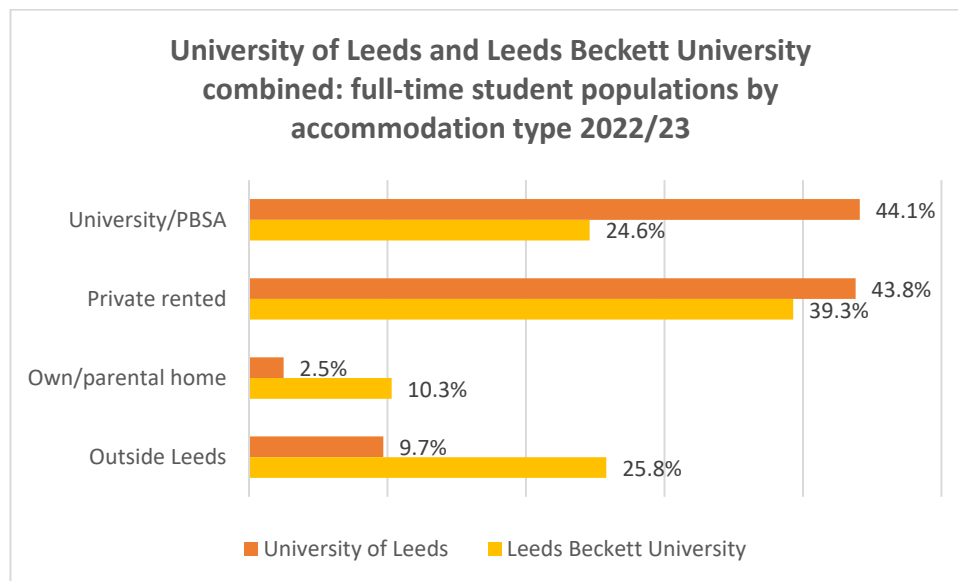
In addition, 531 (one per cent) identified as living in their own home, when completing their address details on their university’s student record system. A significant proportion of this number is, however, likely to have misunderstood the definition of *own home* when selecting from the menu of accommodation types on the system, and were in reality living in rented accommodation.²⁷ Of the remaining student population, 2,222 (4.2 per cent) used their parental home in Leeds as a residential base while studying and 8,121 (15.3 per cent) commuted to their place of study. However, it may be that some of the students – especially international students – who said they were living in their parental home may have been living informally with other family members or family friends or connections, for which there is no available classification.

F1.2.4 Accommodation choices: differences between the two university populations in 2022/23

There were some key differences in accommodation choices between UoL and LBU students in 2022/23:

- over three times as many UoL students (15,202) lived in some form of PBSA, compared to LBU students (4,549)
- twice as many UoL students (15,102) lived in private rented accommodation, compared to LBU students (7,281)
- twice as many LBU students studied from their parental home (1,899), compared to UoL students (854)
- a much higher proportion of LBU students lived outside Leeds, compared to UoL students.

Figure 46



F1.3 Types of accommodation students lived in by year/level of study

Figures 47, 48 and 49 show the balance of different student segments in core accommodation types in 2022/23. (See also Appendix 6d.) The proportional values for the PBSA profile hide big differences between university and private provision. To help honour their accommodation guarantee to growing intakes and to support their offer to PGTs, institutions hold the number of returning undergraduates in check. By contrast, for private providers, returning undergraduates are a core market in the absence of significant volume from incoming undergraduate cohorts (eight per cent of Y1 UGs).

Figure 47

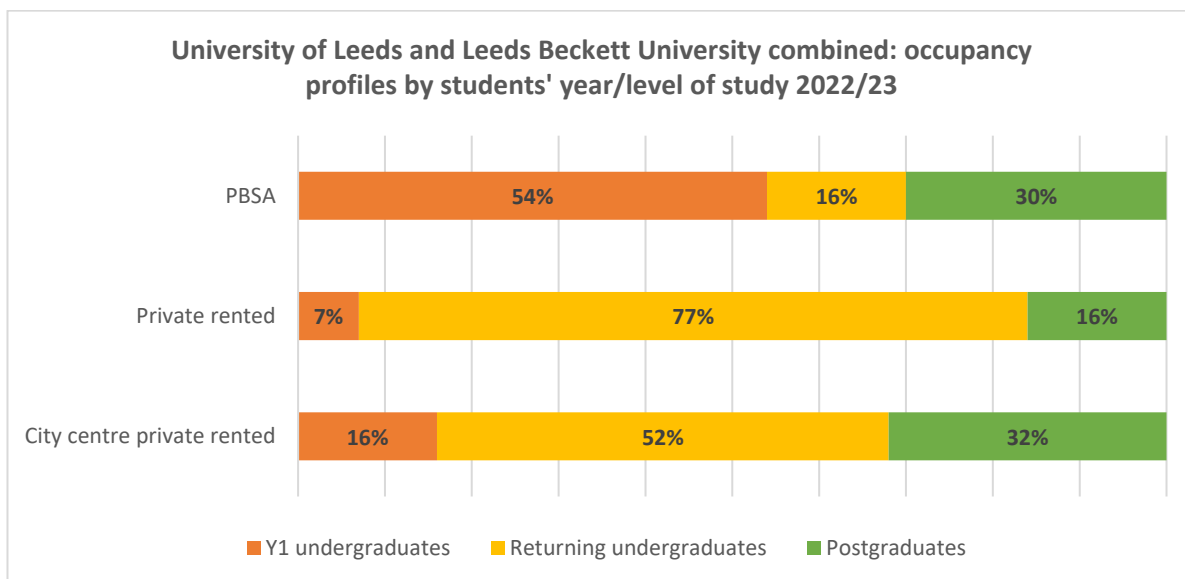
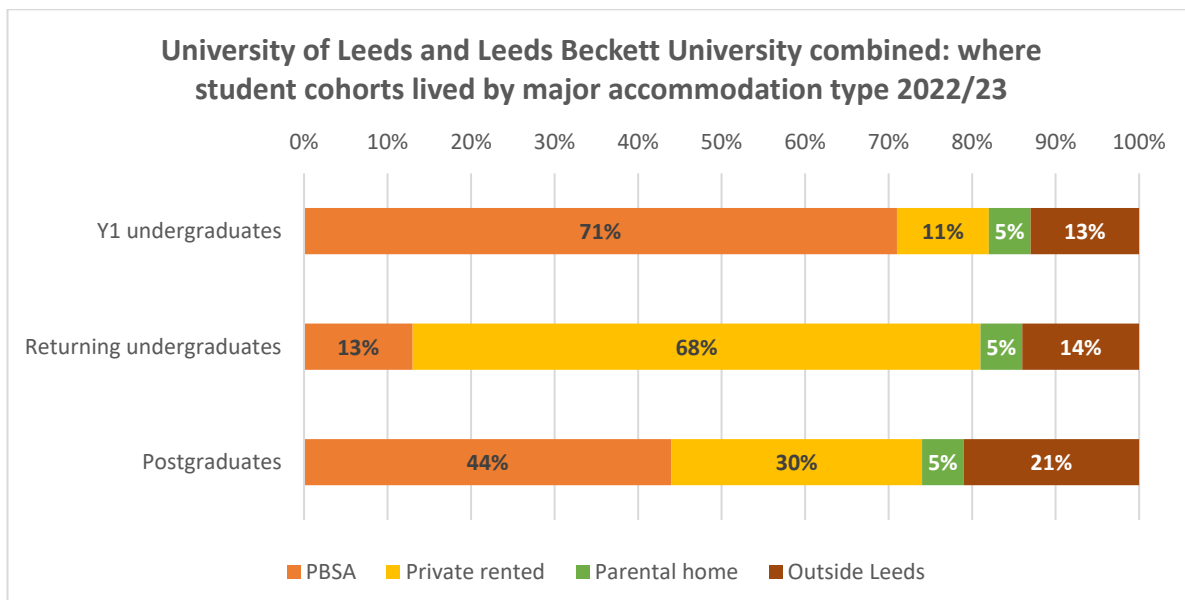


Figure 48



In 2022/23, nearly two-thirds (63 per cent) of new undergraduates were housed in PBSA, organised through their institution (Figure 49 and Appendices 6d to 6f). For returning undergraduates, a similar proportion (64 per cent) found accommodation in the off-street private rented sector. Postgraduates were more evenly spread across accommodation types, the most popular being direct-lets in private PBSA (30 per cent).

Figure 49

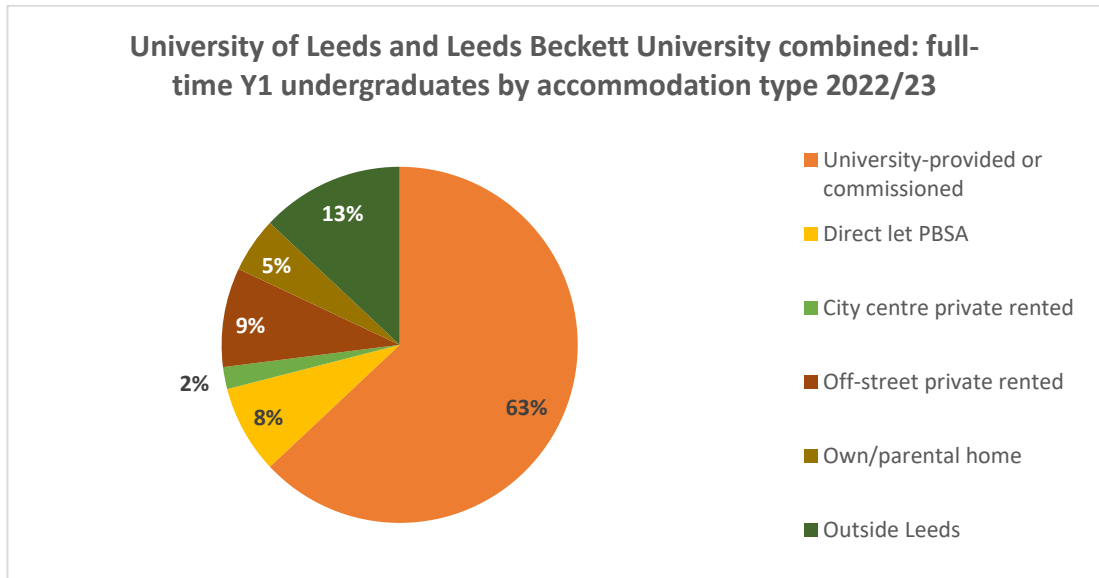


Figure 50

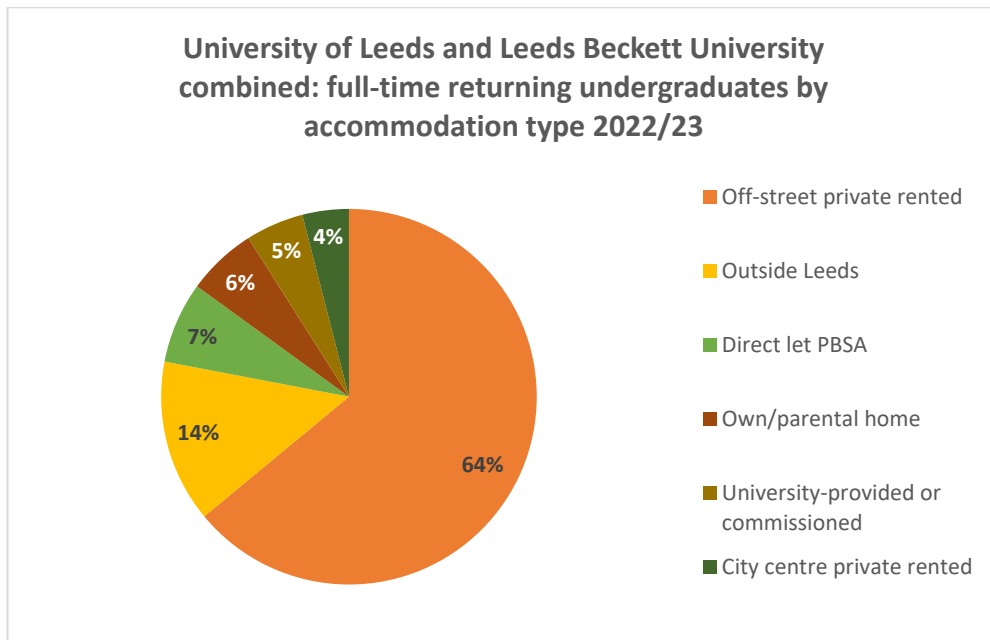
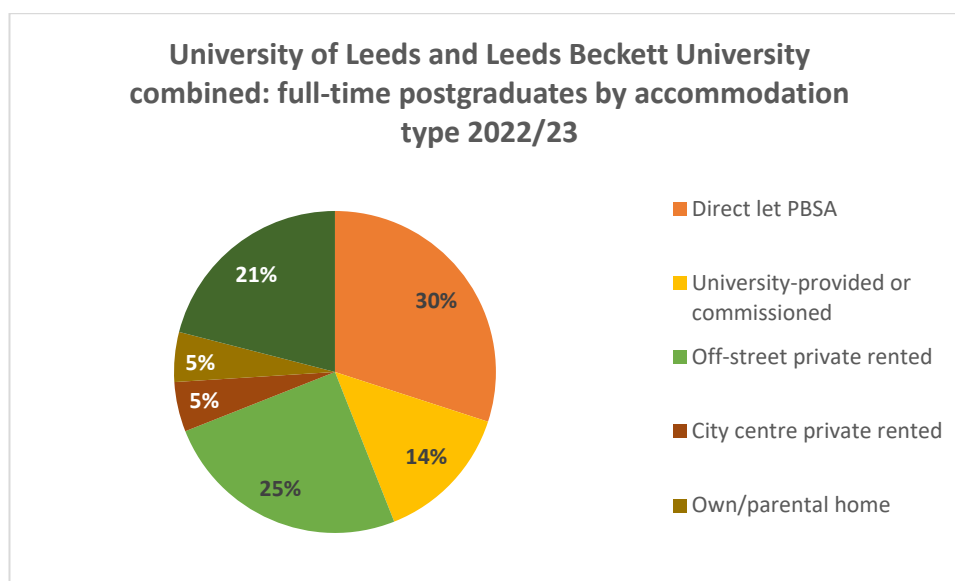


Figure 51

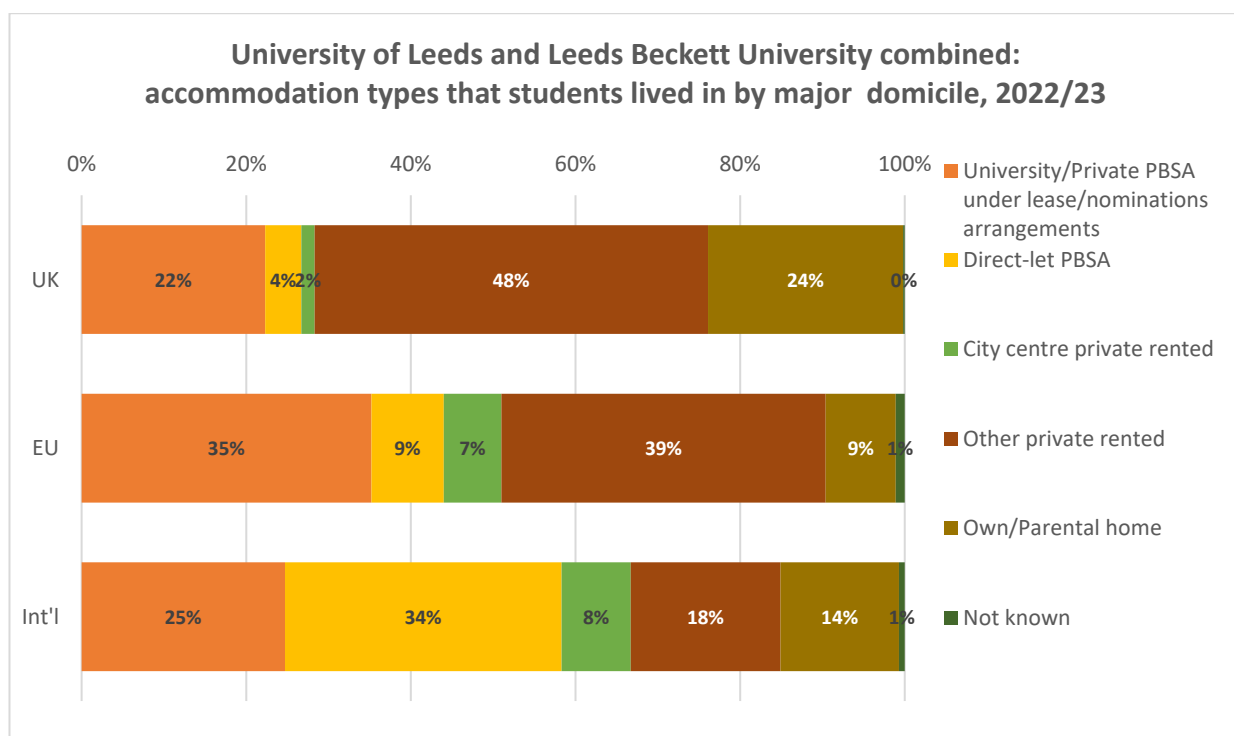


F1.4 ***Types of accommodation students lived in by domicile***

Figure 52 shows the proportions of UK, international and EU students living in the main types of accommodation in 2022/23. (See also Appendix 6h.) The notable differences between UK and international students were in the proportions living in direct-let PBSA, off-street private rented housing and city centre private rented accommodation. That students are beginning to live in city centre private rented accommodation in significant numbers may owe something to increasing convergence in specification and rent levels with PBSA, as well as proximate location. The greater proportions of international students living in direct-let PBSA and in city centre private rented accommodation may reflect stronger preferences among international students not only for this style of housing but also for living in an urban environment, close to their place of study.

There is, of course, a major difference between the proportion of UK and international students who said they lived at home. But it is surprising that so many international students identified as living at home. Some will have recorded this in error, but it is likely that others will have been living with other family members or family friends or other connections, and selected the 'home' option in the absence of a category that fitted their circumstances.

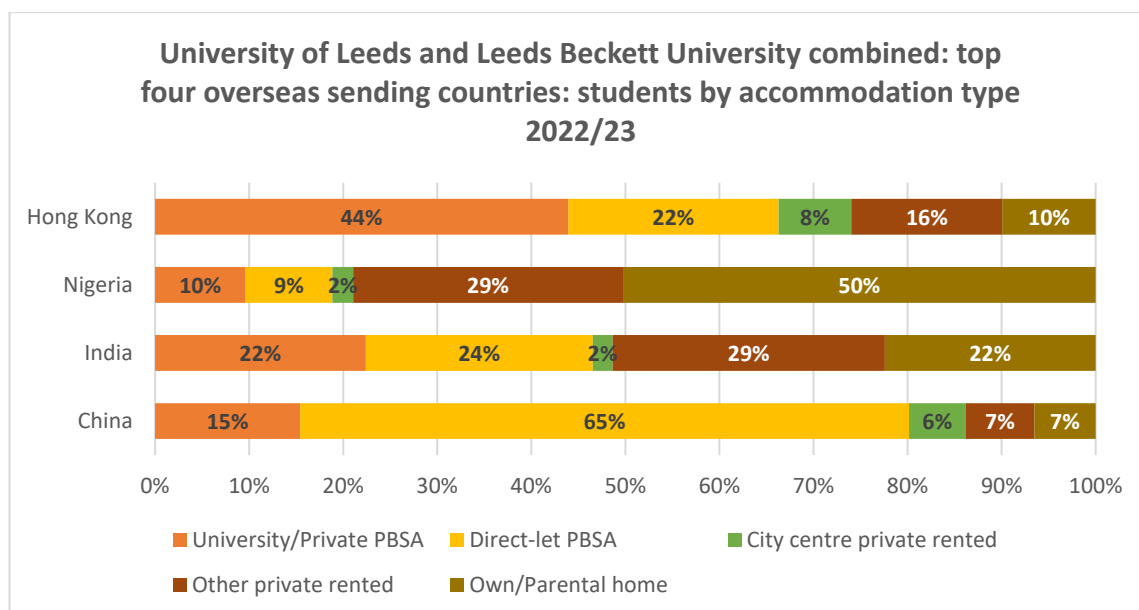
Figure 52



The top four overseas countries sending students to universities in Leeds were China (5,390 or 33 per cent), India (3,546 or 21 per cent), Nigeria (873 or five per cent) and Hong Kong (507 or three per cent).

Figure 53 shows the proportional distribution of students from these four domiciles across the main accommodation types in 2022/23.

Figure 53



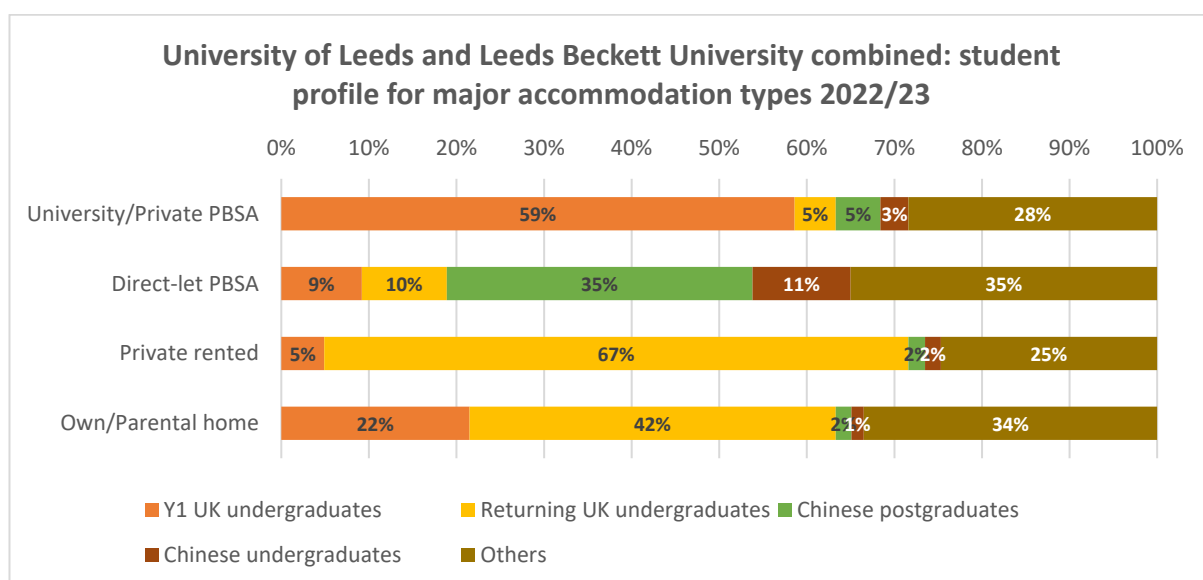
Four-fifths of Chinese students lived in PBSA in 2022/23. Within this figure, 65 per cent let their accommodation directly from a private PBSA provider. These figures reflect not only the dominant preference among Chinese students, but also the bigger budgets generally

at their disposal. The profile for Hong Kong, as a special administrative region of China, is similarly skewed in favour of PBSA and city centre living.

By contrast, students from India were spread relatively evenly across the accommodation types (with the exception of city centre private rented accommodation). A low proportion of students from Nigeria lived in PBSA. These findings on PBSA occupancy reflect the generally smaller budgets available to students from India and Nigeria. Half of Nigerian students recorded that they lived in their own/parental home. Again, there is probably a strong element of misreporting here, but it is likely that some of these students were living in the homes of other family members, family friends or others with connections to their families.

Figure 54 shows the make-up of the occupancy base of the major accommodation types in 2022/23, highlighting some of the largest student segments represented. Chinese students – particularly postgraduates – are strongly represented in direct-let PBSA, but still make up less than half of the occupancy profile in this accommodation type, belying the common perception that this kind of housing is overwhelmingly for rich Chinese students.

Figure 54

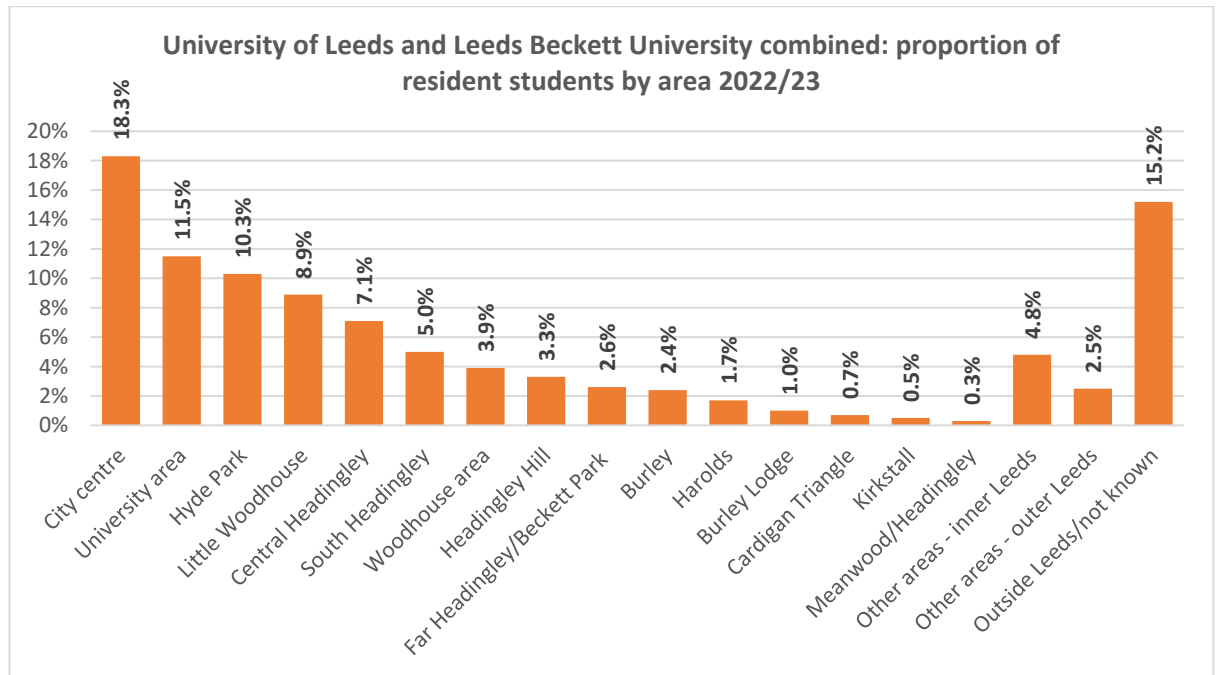


F1.5 **The geography of where students live**

F1.5.1 *How students were distributed across INWL localities*

For 2022/23, Figure 55 sets out the spread of University of Leeds and Leeds Beckett University students across the localities of Inner North-West Leeds, plus summary figures for students living in inner and outer Leeds and outside the city. (See also Appendix 6o.)

Figure 55



Students living in inner areas outside Inner North-West Leeds accounted for 4.8 per cent of the combined full-time student populations of the University of Leeds and Leeds Beckett University in 2022/23. Figure 56 provides a breakdown of the main areas where these students were living. (See also Appendix 6v.)

Figure 56

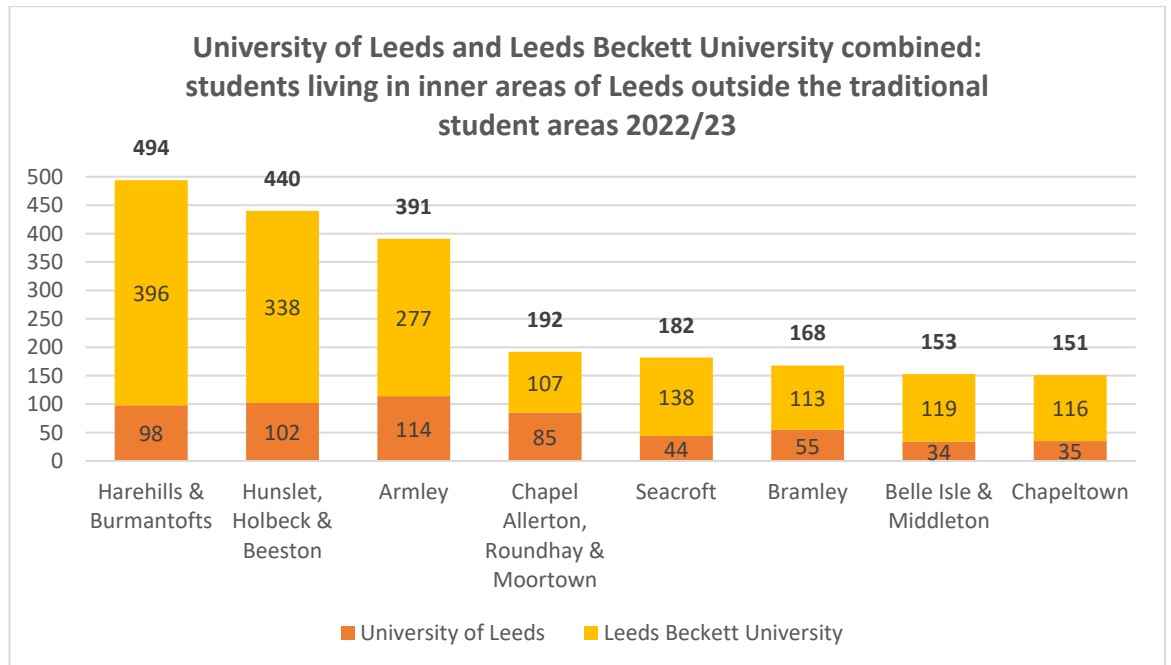
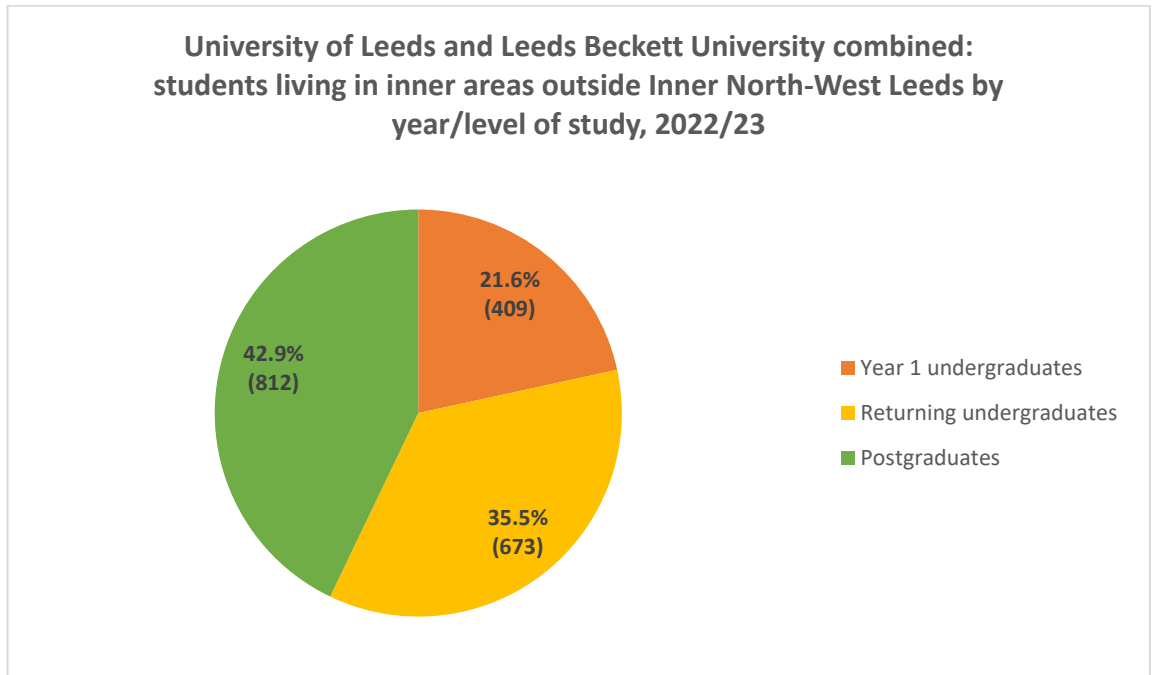


Figure 57 shows the proportional breakdown of postgraduates and new and returning undergraduates living in inner Leeds but outside the traditional student areas in 2022/23.

Figure 57



Of the 8,121 students living outside Leeds, 54.2 per cent were living elsewhere in West Yorkshire (4,365), and 2,102 of these were in the Bradford area (2,102). A further 16.5 per cent were living in other parts of Yorkshire and just under a fifth (19.1 per cent) were living in areas less than two hours from Leeds (including 12.2 per cent in the North-West, 2.2 per cent in the North-East and 4.7 per cent in the Midlands). (See also Appendix 6x.)

Figure 58

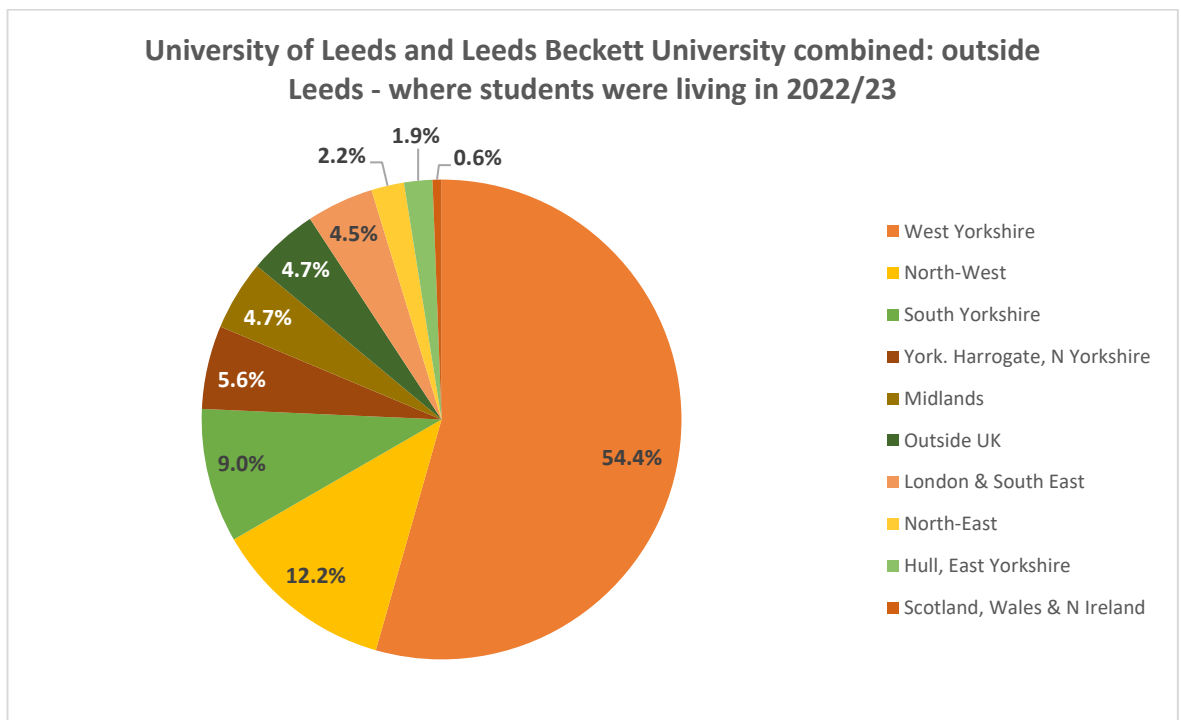
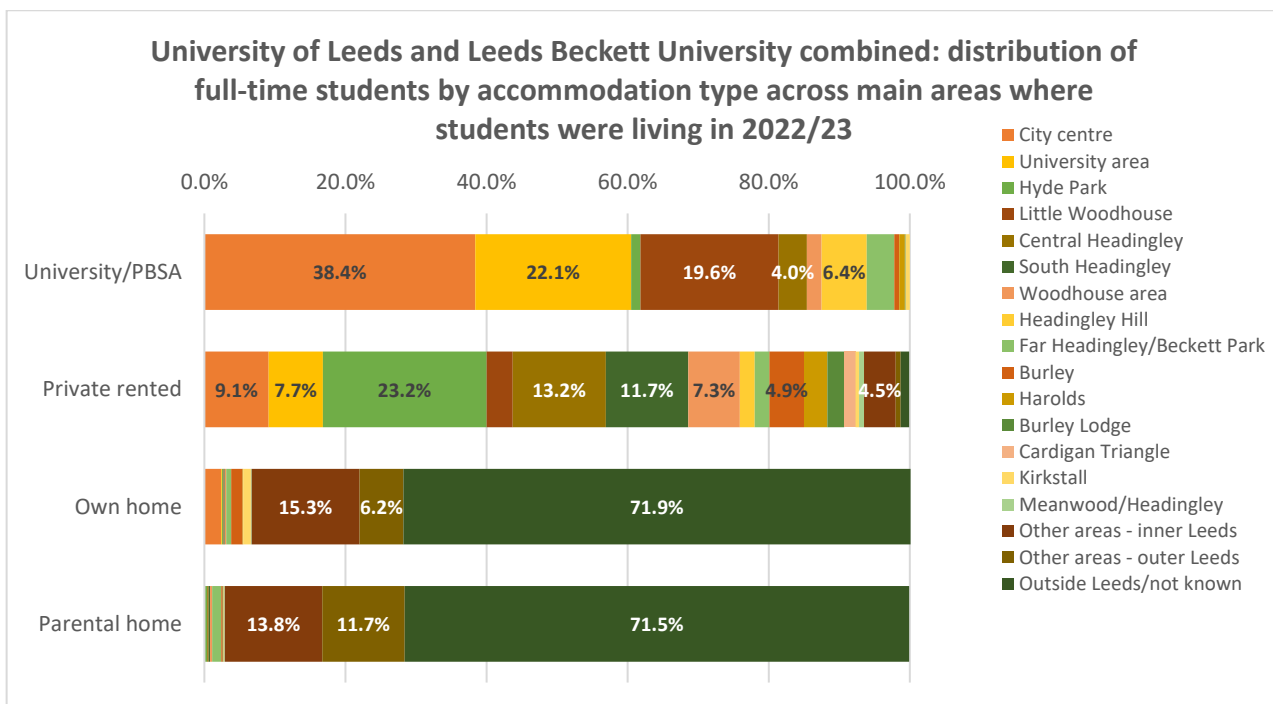


Figure 59 shows that over four-fifths (80.1 per cent) of students living in PBSA lived in the three areas closest to the University of Leeds campus: the city centre, the University area

and Little Woodhouse. Of those in the private rented sector, nearly half (48.1 per cent) lived in the contiguous areas of Hyde Park, South Headingley and Central Headingley.

Figure 59



More than half of students living in the city centre were Year 1 undergraduates; over a quarter were postgraduates and just under a fifth were returning undergraduates (Figure 60). (See also Appendix 6o.)

Figure 60

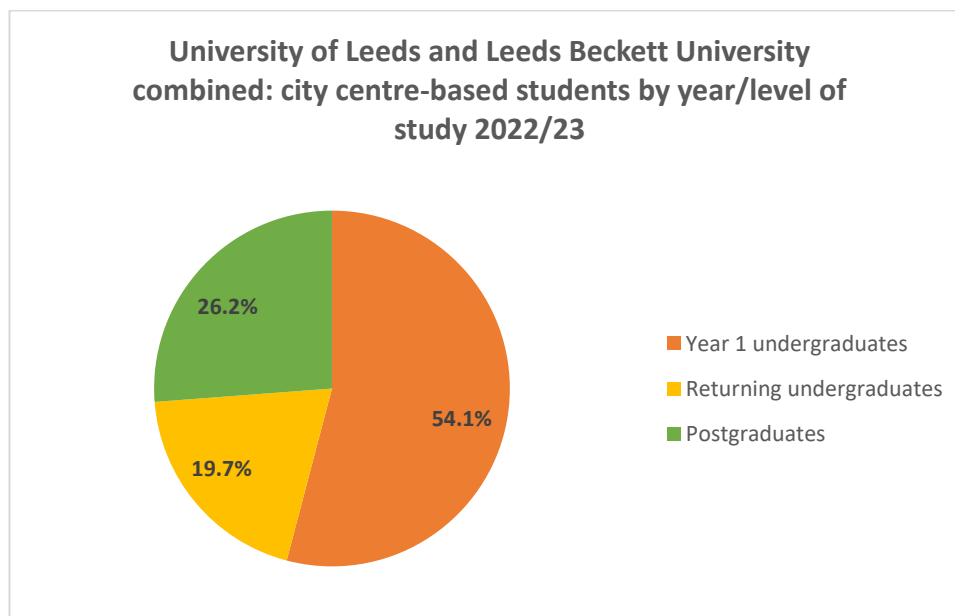
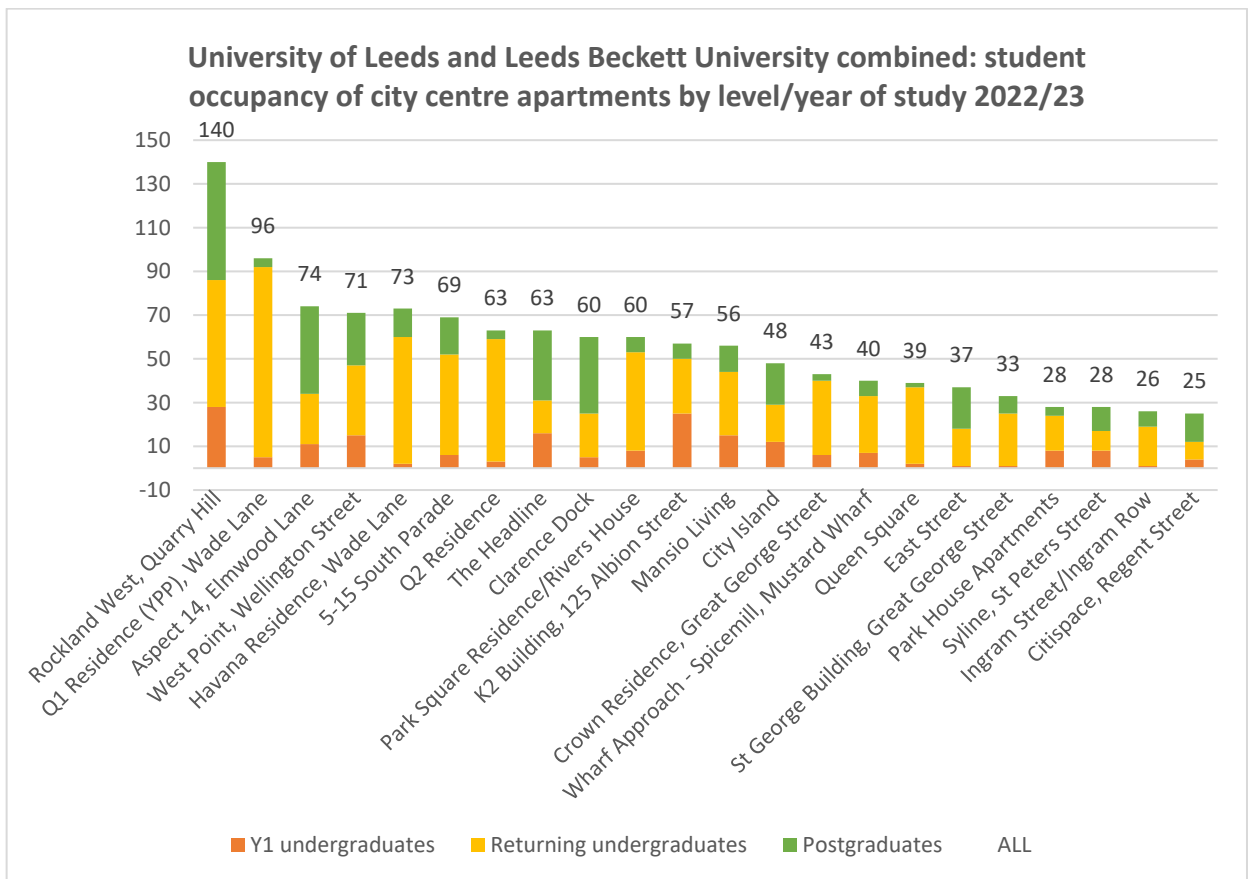


Figure 61 shows that there were a number of mainstream private rented city centre apartment blocks with significant numbers of resident students in 2022/23: 1,226 students were in 22 blocks with 25 or more students.

Figure 61



Of these, over half (56 per cent) were returning undergraduates, 28 per cent were postgraduates and 16 per cent were undergraduates.

F1.5.2 *Students' proximity to campus*

Figure 62

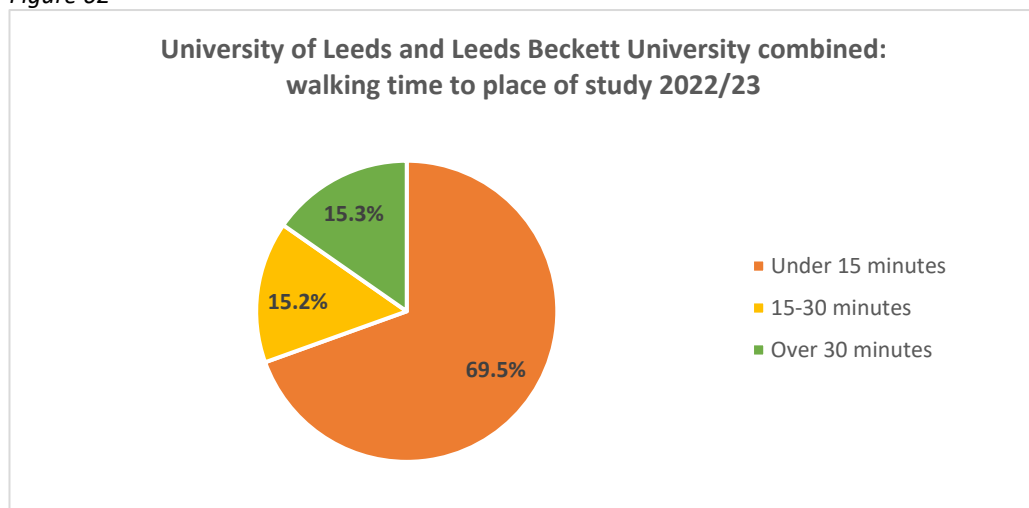
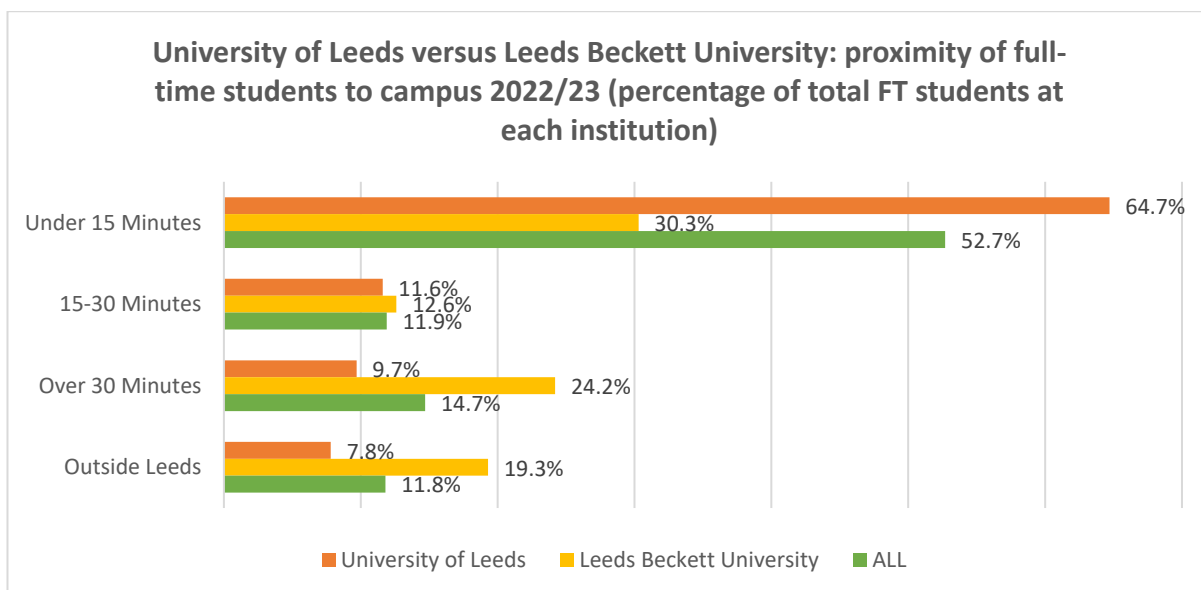


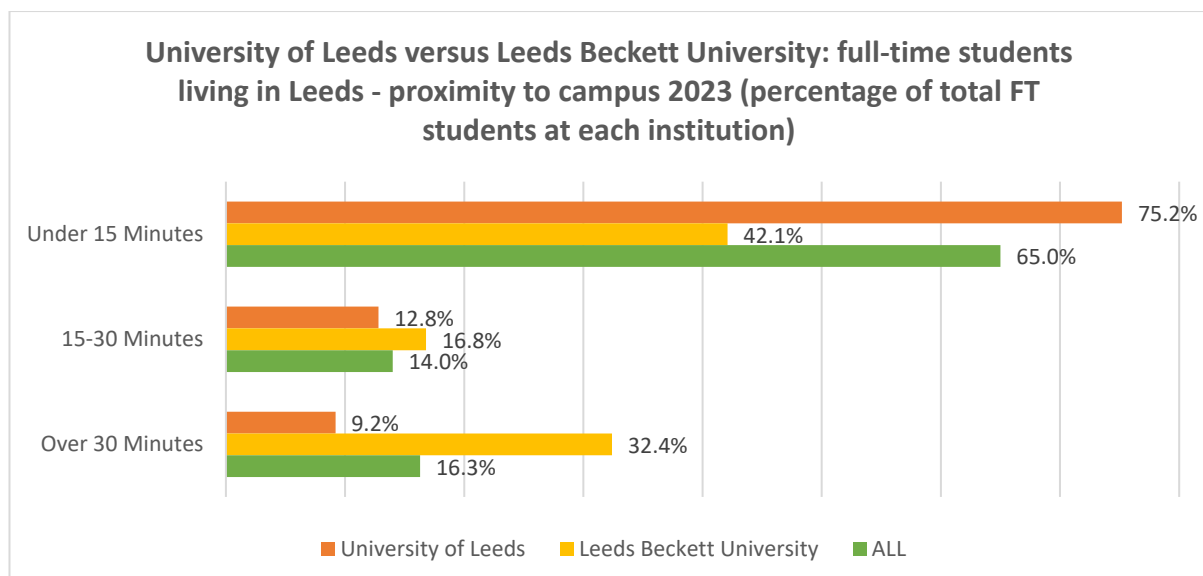
Figure 62 shows that almost 70 per cent of students at the two universities were living within 15 minutes' walk of campus. (This excludes a proportion of those living in the Central and Far Headingley areas which are over 30 minutes' walk of the city centre campuses, but which contain students living within 15 minutes of the Headingley Campus in Beckett Park.)

Figure 63



University of Leeds students were more likely to be living within 15 minutes of campus (although a proportion of Leeds Beckett University students living over 30 minutes away would have been living within 15 minutes of the Headingley Campus). Significantly more Leeds Beckett University students were living outside Leeds.

Figure 64

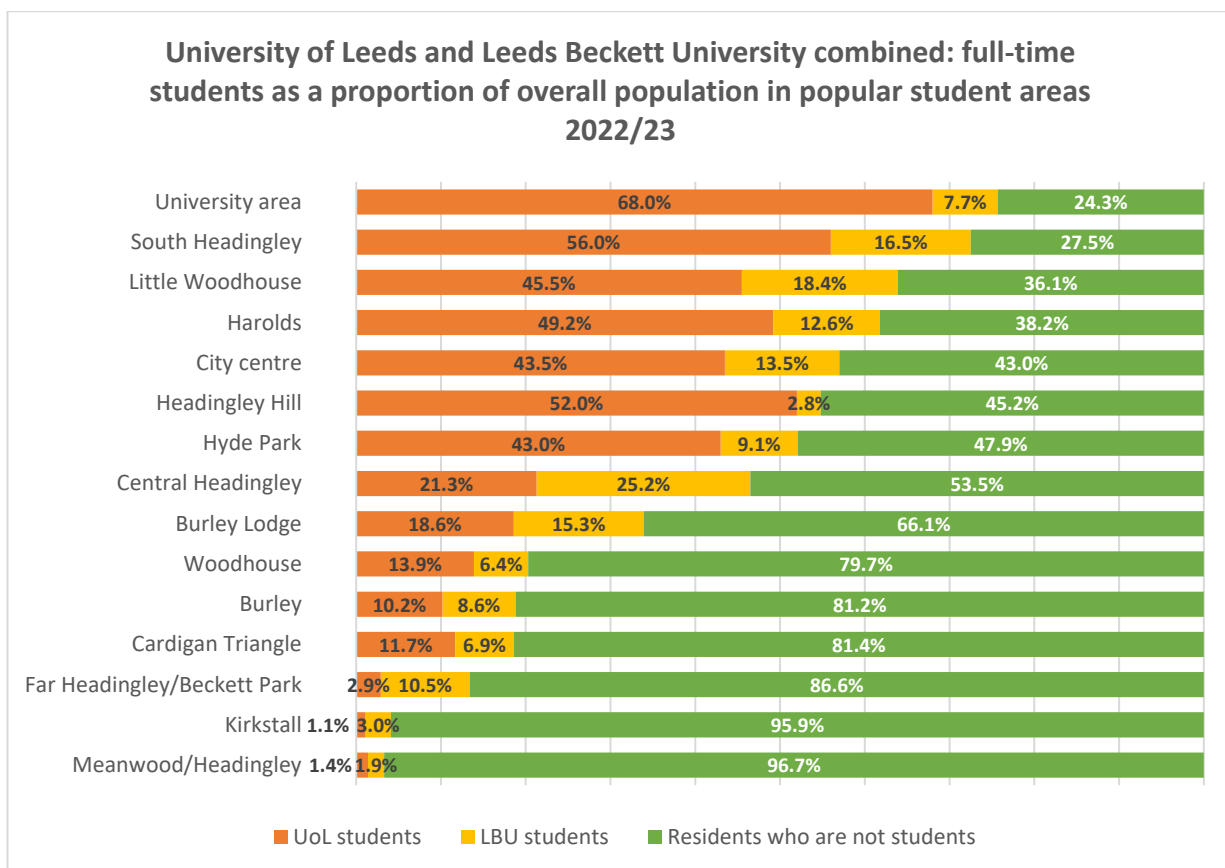


If students living outside Leeds are excluded, the proportions living within 15 minutes of campus are higher still.

F1.5.3 Students as proportion of local populations by area

Currently, students comprise 40.3 per cent of the population of Inner North-West Leeds as a whole (including the city centre), but the proportion varies by locality within the area (Figure 65).

Figure 65



Students make up over half the local population in South Headingley (72 per cent), the University area (67 per cent), Little Woodhouse (64 per cent), the Harolds (62 per cent), the city centre 57 per cent and Headingley Hill (54 per cent). Students comprise between 20 and 50 per cent in Central Headingley (47 per cent), Burley Lodge (34 per cent) and Woodhouse (31 per cent). Students account for under a fifth of the population in Burley (19 per cent), the Cardigan Triangle (also 19 per cent), the Far Headingley/Beckett Park/Weetwood area (13 per cent), Kirkstall (four per cent) and the Meanwood/Headingley border area (three per cent).

F2 University of Leeds and Leeds Beckett University: change over time

F2.1 Changes in the student population

Figure 66

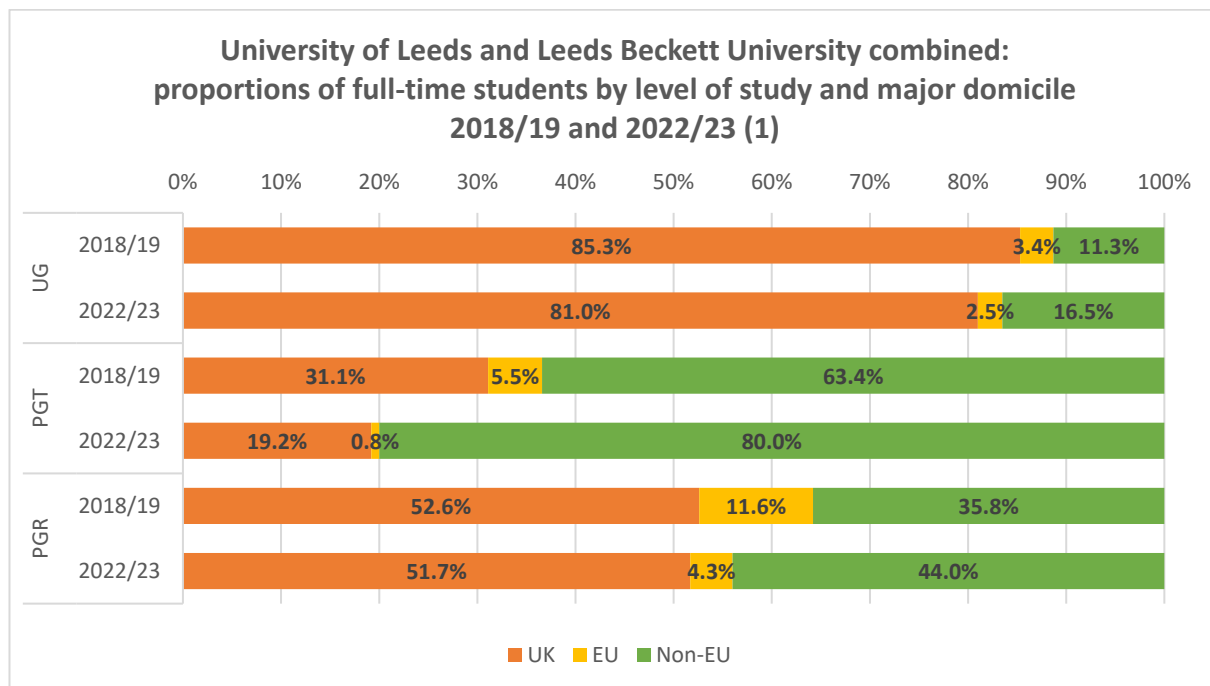


Figure 66 shows that, between 2018/19 and 2022/23, for the universities combined, the proportion of:

- full-time undergraduates:
 - from the UK fell by 4.3 percentage points
 - from non-EU countries rose by 5.2 percentage points
- taught postgraduates
 - from non-EU countries increased dramatically by 16.6 percentage points
 - from the UK reduced significantly by 11.9 percentage points.

Figure 67

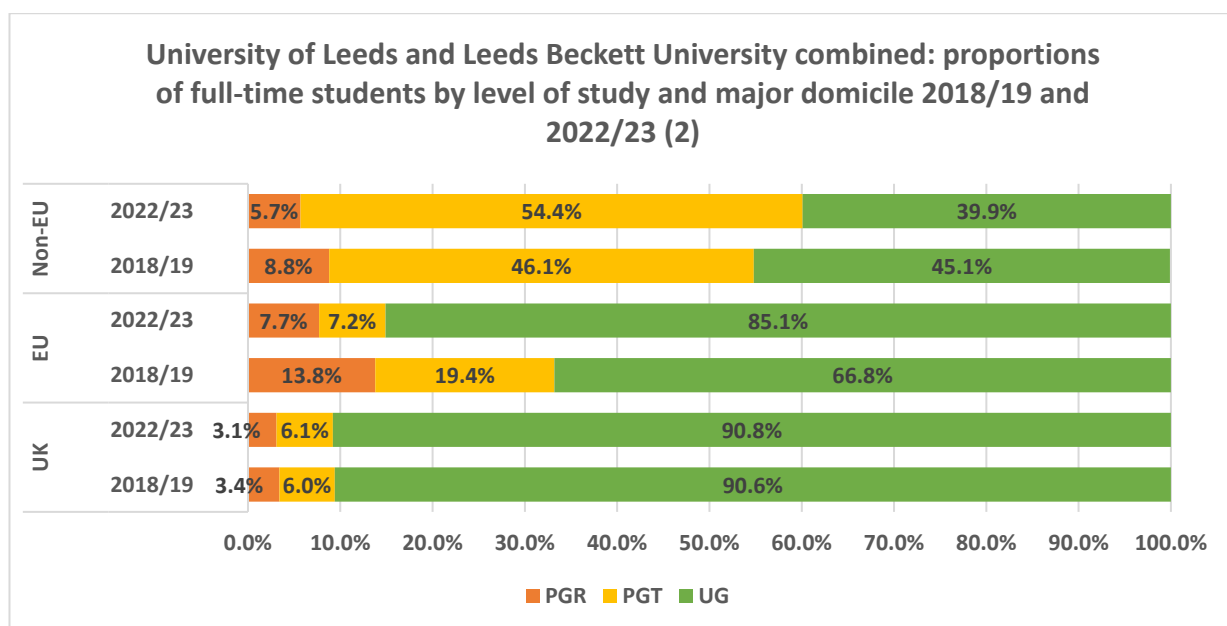
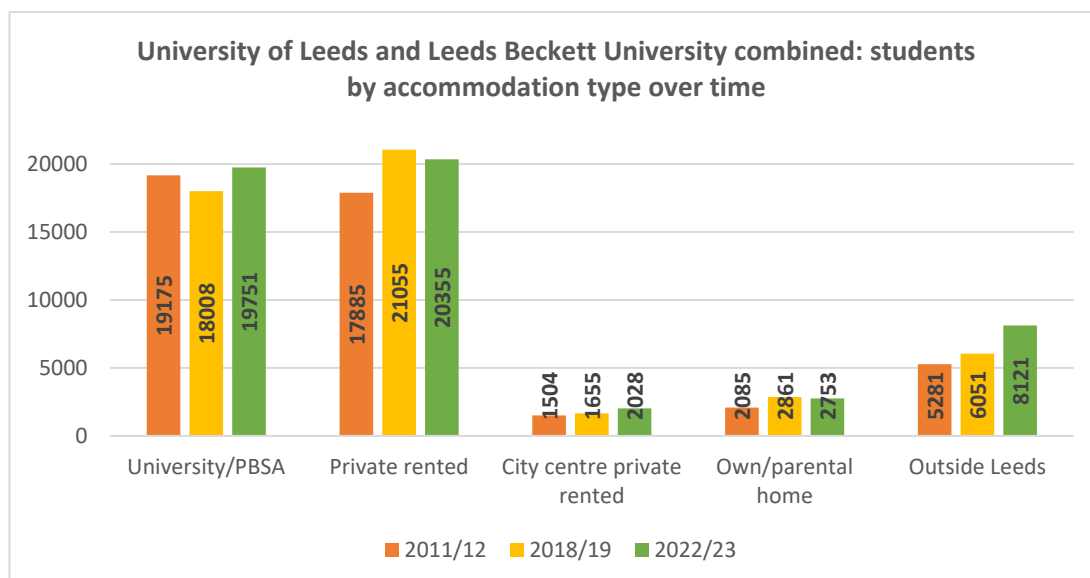


Figure 67 shows that between 2018/19 and 2022/23, for the universities combined, the proportion of:

- non-EU taught postgraduates rose by 8.3 percentage points
- non-EU undergraduates fell by 5.2 percentage points.

F2.2 Changes in student accommodation settings

Figure 68



Data presented in Figure 68 and Appendix 68 show that in 2022/23, compared to 2011/12, there were

- 576 more University of Leeds and Leeds Beckett students living in PBSA
- 2,470 more in off-street private rented accommodation in residential areas
- 524 more in private rented apartments located in Leeds city centre
- 668 more in their parental or own home²⁸

- 2,840 more living outside Leeds.

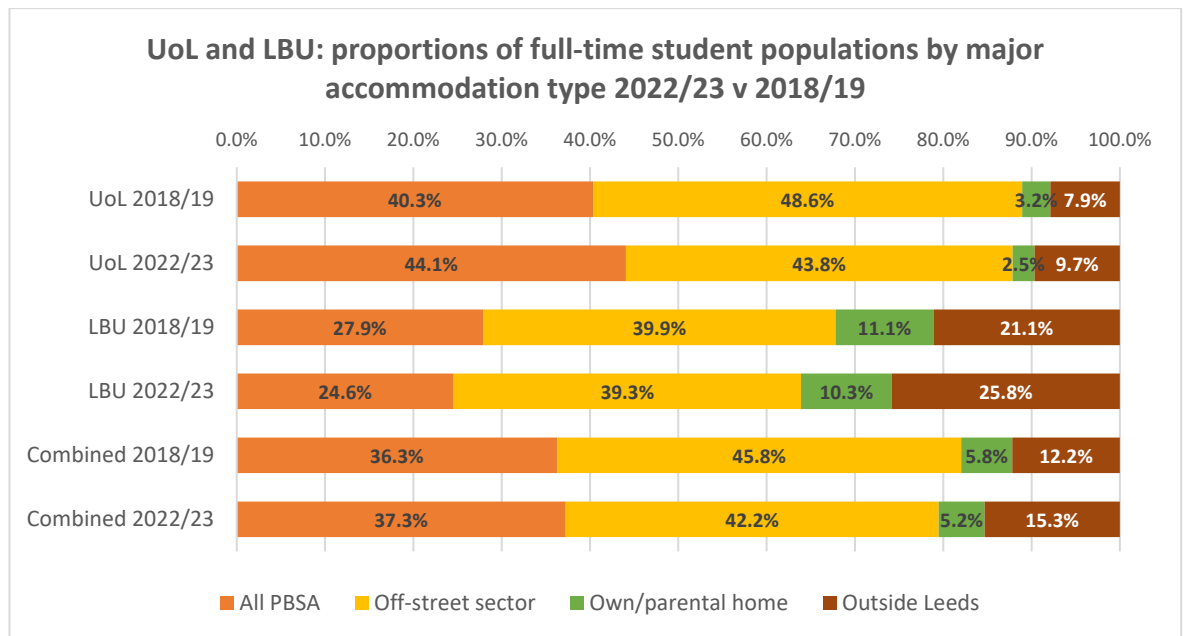
Compared to 2018/19, in 2022/23 there were:

- 709 fewer students living in university-maintained accommodation
- 1,032 more students in PBSA let through leasing or nominations agreements
- 1,420 more students in PBSA secured through direct-lets.

In all, in 2022/23, compared to 2018/19, there were:

- 1,743 more students living in PBSA, an increase of 9.8 per cent
- 700 fewer students living in off-street private rented accommodation in residential areas
- 373 more in private rented apartments located in Leeds city centre
- 687 more students studying from their parental home
- 2,070 more living outside Leeds.

Figure 69



Between 2018/19 and 2022/23, the proportion of University of Leeds students living in PBSA (university-maintained or private/charitable sector-run) increased from 40.3 to 44.1 per cent, reflecting a growing international base. The proportion of Leeds Beckett University students reduced from 27.9 to 24.6 per cent. Over the same timeline, the proportion of University of Leeds students living in private rented housing fell from 48.6 to 44.1 per cent, while the proportion of Leeds Beckett University students remained broadly similar. The proportion of Leeds Beckett University students living outside Leeds also increased from 21.1 to 25.9 per cent, as the institution grows its base of commuter students. (See also Appendices 6a to 6f.)

Figure 70

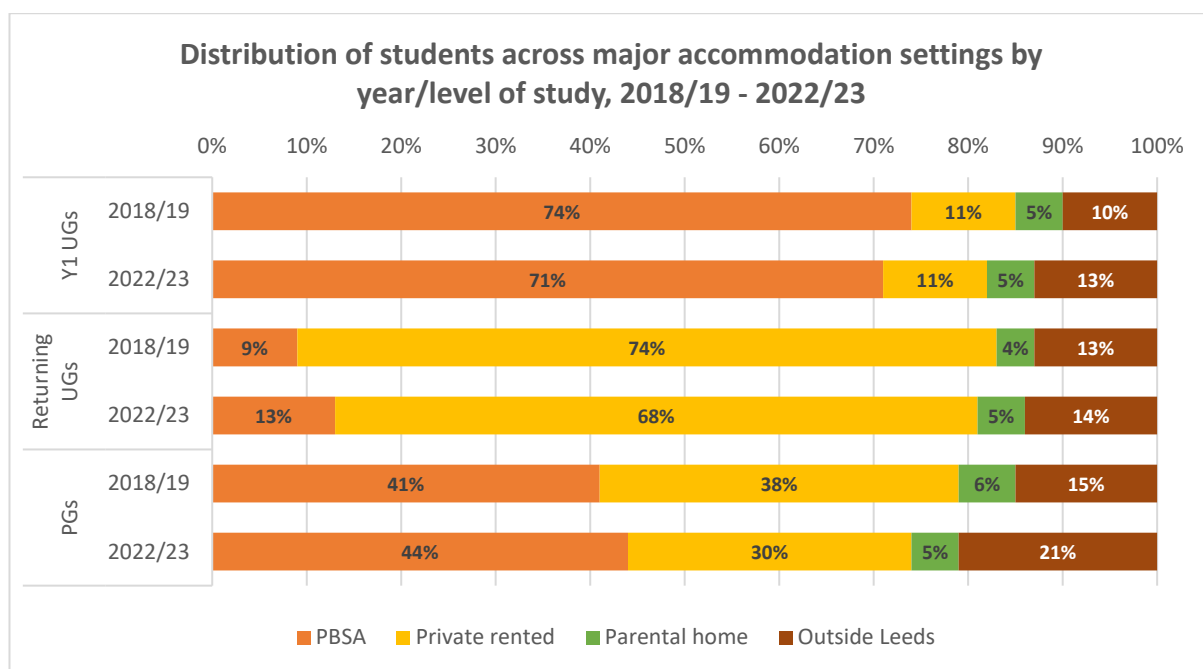


Figure 70 shows, by year/level of study, how the accommodation settings of University of Leeds and Leeds Beckett University students shifted between 2018/19 and 2022/23. (See also Appendix 6g.) The significant changes were:

- a drop of three percentage points in the proportion of Year 1 undergraduates living in PBSA, correlating inversely with growth in the proportion living outside Leeds
- a six-percentage-point fall in the proportion of returning undergraduates in off-street private rented accommodation and a four-percentage-point rise in the proportion living in PBSA
- a drop of eight percentage points in the proportion of postgraduates living in off-street private rented housing and a six-percentage-point increase in the proportion living outside Leeds.

Overall, finite capacity in the off-street sector is likely to be a contributory factor in these shifting dynamics. For some of the students either living outside Leeds or in their family home, their accommodation may have been their fall-back option, having been unable to find suitable accommodation in the off-street sector at the right price. This may also apply to postgraduates in the market for cheaper options outside Leeds.

F2.3 **Changes in the geographical areas where students were living**

Data presented in Figure 71 (and in Appendix 6u) show that, between 2011/12 and 2022/23, in the individual areas comprising the city centre and Inner North-West Leeds:

- the biggest increases in student numbers were in the city centre and university area, reflecting the increase in PBSA supply in these locations
- there were more modest increases in:
 - the Hyde Park, South Headingley, Harolds/Burley Lodge areas, reflecting the continuing movement of students towards the city centre/university campuses
 - the Central Headingley area, reflecting the continuing influence of the Headingley Campus and the continuing popularity of the area.

Figure 71

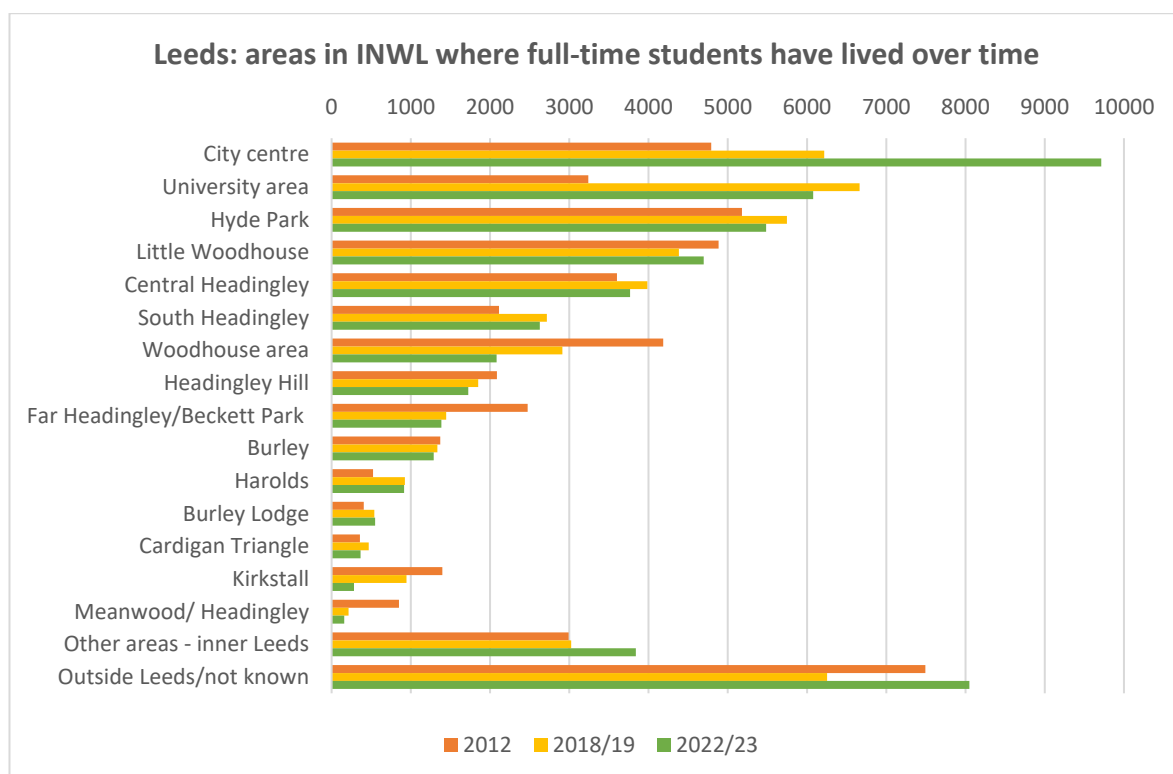
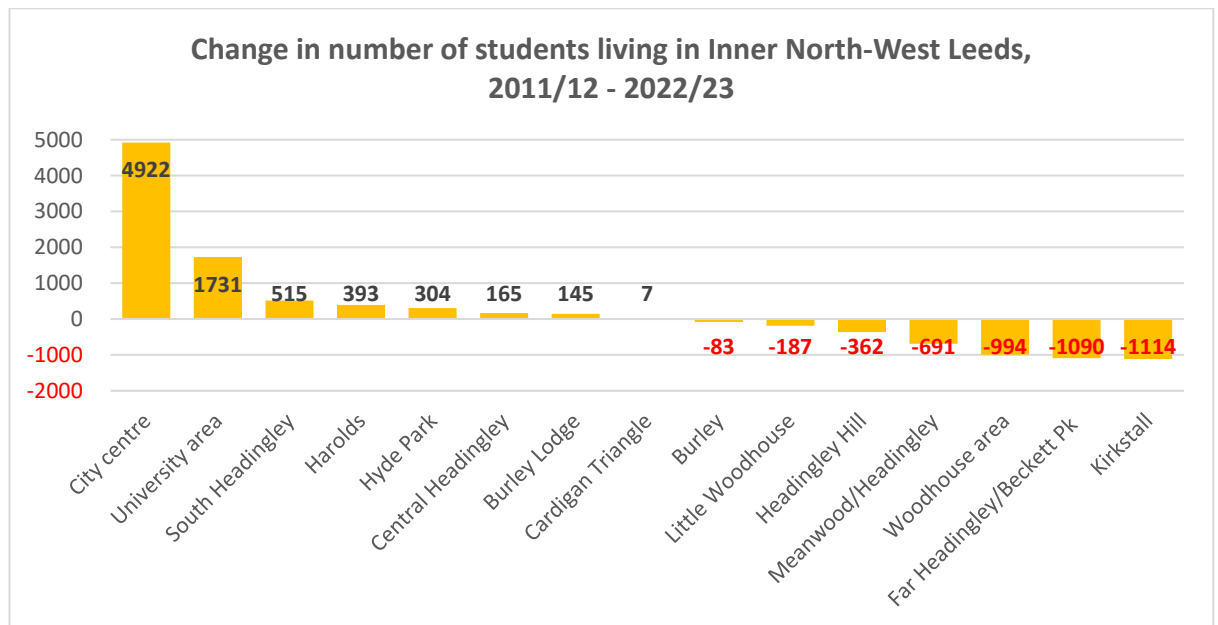


Figure 71 also shows that the number of students living in Kirkstall, Far Headingley/Beckett Park, the Meanwood/Headingley border areas and in Woodhouse reduced substantially. More modest falls are recorded for Headingley Hill, Little Woodhouse and Burley. Generally, declining student numbers are likely to be related to the impact of competition for available housing from young workers. Additionally, lower student numbers:

- in Woodhouse may reflect the attraction of increasing supply in the city centre and other areas close to the universities
- in Kirkstall, Burley, Far Headingley/Beckett Park and Meanwood/Headingley border areas may reflect the return of some housing to owner occupation
- in Headingley Hill may reflect migration to housing closer to the university campuses.

Figure 72 shows that, between 2012 and 2022/23, there was an increase of 4,922 students living in the city centre and of 1,931 students in the University area, plus more modest growth in South Headingley the Harolds, Hyde Park, Central Headingley, Burley Lodge, the Cardigan Triangle and Little Woodhouse.

Figure 72



The comparison also shows reductions of around 1,000 in Kirkstall, Far Headingley, Beckett Park and Woodhouse.

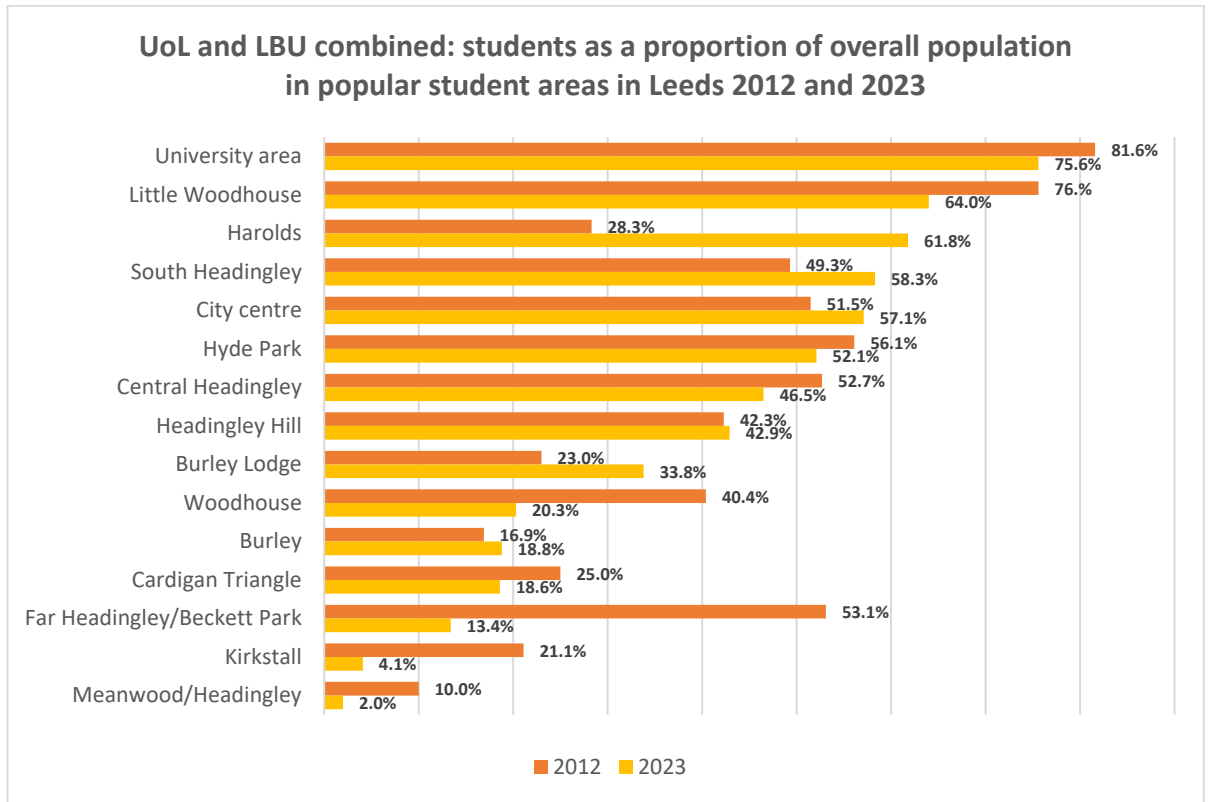
It is striking that, between 2018/19 and 2022/23, there were 3,500 more students living in the city centre and that the proportion of total students renting in this area increased from 12.5 to 18.3 per cent. There was also a modest increase in the number of students in Little Woodhouse and 744 more students living in inner areas of Leeds outside INWL (a proportional increase from three to 4.8 per cent). Almost 1,800 more students were studying from accommodation located outside Leeds (a proportional increase from 10.5 to 15 per cent).

F2.4 ***Changes in concentrations of students in local populations***

In comparing data for 2011/12 and 2022/23, Figure 73 shows that the proportion of students in the local population reduced:

- in areas furthest away from the university campuses – Far Headingley, Beckett Park and Weetwood; Kirkstall; the Meanwood/Headingley border area; the Cardigan Triangle; Central Headingley; and Burley
- in some areas closer to the campuses – the University area; Little Woodhouse; Woodhouse; and Hyde Park.

Figure 73

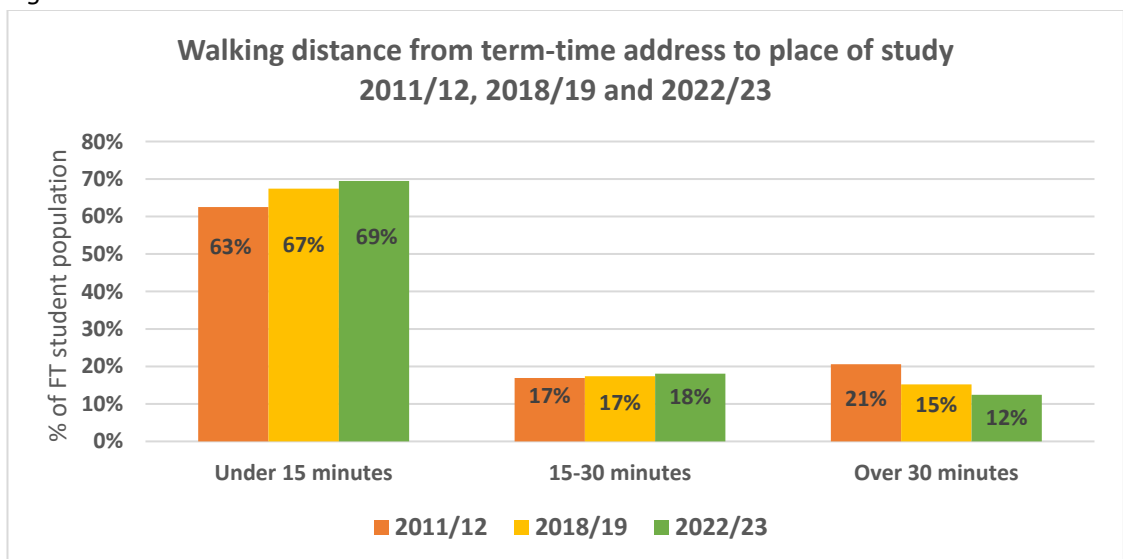


The proportion of students in the local population has increased in the city centre and in some areas close to UoL and LBU – the Harolds; South Headingley; Headingley Hill; and Burley Lodge.

F2.5 **Changes in proximity to campus**

Figure 74 shows that the proportion of students living less than 15 minutes’ walk from the university campuses increased by six percentage points between 2011/12 and 2022/23. The proportion living over 30 minutes’ walk reduced by nine percentage points over the same period.

Figure 74



F3 Summary

In 2022/23, while almost two-thirds of new undergraduates were living in accommodation allocated by the universities, a third found somewhere to live in direct-let PBSA or in the private rented sector, or they decided to study from their parental home. The traditional model of new students living in university-allocated accommodation appears to be under strain. It is a moot point whether students eligible to apply for university-allocated PBSA but deciding to live elsewhere made a genuine choice, or were unable to access or afford institutional options on offer.

There has been an increase in the number of returning undergraduates living in direct-let PBSA housing. Sustained demand from Year 1 undergraduates and growth in international postgraduates mean that institutional guarantees are coming under considerable pressure. This is likely to mean the quantum of university accommodation available for returning students is squeezed.

Postgraduates are living in a mix of settings. Growing numbers of them are opting to live in PBSA. However, for a proportion of them, PBSA rents are likely to be prohibitively expensive. So too may be the price tags attached to city centre living and off-street renting. With narrower options available to them, it is likely that some postgraduates are looking to rent in cheaper and lower-quality housing, often outside the student market.

Almost two-thirds of students living in university or private PBSA in 2022/23 were UK students, while just eight per cent were Chinese. However, nearly half (46 per cent) of students living in direct-let PBSA were Chinese, compared to a figure of 22 per cent for UK students. The contrasting figures for direct-let occupancy reflect the reality that this market segment is tailored for and targeted at students with bigger budgets – Chinese students in particular.

The proportion of international students living in direct-let PBSA was almost eight times higher than for UK students. The proportions of international students and UK students living in university/private PBSA were similar. International students had either limited choice in accessing cheaper PBSA options or they had a preference for the amenities offered by, and an ability to meet the costs of, direct-let PBSA. Indian and Nigerian students were far less likely to be living in PBSA than were Chinese students, possibly for reasons of cost.

The proportion of UK students living in private rented housing was 2.5 times higher than for international students, but the proportion of international students living in city centre private rented housing was five times higher than for UK students. This suggests the continuing appeal of off-street private rented housing for UK returning students and perhaps a greater preference among many international students to live in the city centre or close to campus.

Students are increasingly gravitating towards the city centre and the areas closest to the University of Leeds campus. They have consolidated in the traditional student heartland of Hyde Park. Within Inner North-West Leeds, students have been gradually moving out of areas which are furthest from campus and which historically have been dominated by residential family households.

There is a strong and growing preference among students to live within a 15-minute walk of the city centre/their place of study. Cost-of-living and convenience considerations play

a part in shaping this preference. But it remains unclear just how far the urban/campus clustering of where students live is demand- or supply-led.

There is a mix of new undergraduates, returning undergraduates and postgraduates living in the city centre. This contradicts perceptions that city centre PBSA and other housing is dominated by affluent international postgraduates.

Analysis of the occupation of private rented housing across Inner North-West Leeds indicates that Central Headingley, Woodhouse, Burley and Kirkstall have become focal points and dual markets for young households.

G CONCLUSIONS

G1 The short term: 2023/24 – 2024/25

It is likely that there will be sufficient PBSA and off-street shared housing to meet demand.

Citywide, strong student number growth from 2015/16 to 2020/21 slowed and stalled in the two following cycles. At the time of writing, there were early signs that, collectively, local institutions may not have achieved the planned aggregate increase (2,300) for 2023/24. It is uncertain whether they will regain momentum and fully achieve their growth plans within the five-year planning horizon.

For 2023/24, 1,337 additional PBSA beds (excluding 700 beds that were refurbished beds re-entering the market) are due to enter the market in-year, but a further 1,125 are expected to come into commission in Leeds for the start of the 2024/25 letting year. *Numerically*, PBSA volume appears to be in slight surplus and therefore adequate to meet modest rising demand in the short term.

Off-street housing supply is static, but *numerically* likely to be able to meet demand. However, students may find it increasingly difficult to secure shared housing that suits their budget and is in an area they want to live.

However, there are warning signs that some stock does not meet the needs of students and may become unavailable or unobtainable for them:

- In Inner North-West Leeds – the traditional student heartlands – there is growing competition from young workers for the finite and capped volume of off-street shared housing
- The supply of moderately priced PBSA is limited, as most recent and planned new-build is configured as higher-cost ensuite and studio provision
- In sharp contrast with historical patterns, almost a third of Year 1 undergraduates are now not accommodated in the PBSA offered them by their institutions, suggesting that it does not meet their requirements
- There is evidence that a greater proportion of returning undergraduates are living in PBSA. Although small, this represents a discernible and material erosion of the historical paradigm of students automatically choosing the off-street sector after spending their first year in PBSA
- There is evidence that some international students, unable to access or afford PBSA/off-street housing, are finding informal accommodation solutions
- Compared to 2012, there are 3,253 more students living in parts of INWL (the Hyde Park area, the University area and Central Headingley), in spite of the longstanding bar on increasing stock in these areas. This strongly suggests significant incidence of excess occupancy (doubling-up and sofa-surfing).

G2 The medium to long term (2025 onwards)

Citywide, student numbers are projected to rise steadily to 2027/28 (+1,754). The market is becoming highly segmented, so that meeting student demand is increasingly more than just a matter of slotting generic students into generic bed spaces.

Notwithstanding available pipeline data, there is a firm consensus that new PBSA bed spaces coming into commission before ~~is expected before at least~~ 2026/27 will be low in volume

The gap in costs between PBSA and off-street shared housing is likely to continue to narrow and may lead returning undergraduates to view lower-cost or university-allocated PBSA as a more attractive option than hitherto. Currently, however, institutional planning models operate on the basis of relatively low demand from this segment.

It is highly likely that there will be continuing and probably increasing competitive demand pressure for off-street shared housing from young working households. This may lead to increasing rent levels as demand outstrips supply. There is already some evidence of gazumping in the market, among both landlords and tenants.

The impacts of the Renters (Reform) Bill, once enacted, are likely to start to materialise in this period, and could include a significant reduction in off-street stock available to students, as landlords move to other markets. This is likely to create a shortage for returning undergraduates and more cost-conscious internationals and cause disruption and dislocation for the affected students.

It is likely that some off-street stock may exit the market, as some landlords sell. (The speed and extent of such losses are likely to be affected by the eventual content of the Renters Reform Bill.) At the same time, given the restrictions imposed by the Article 4 Directions under Policy H6 of the Leeds Local Plan, it is unlikely that any additional supply of HMO accommodation will materialise, although there are indications of at least some new build-to-rent housing in and around the city centre.

These conditions and prospects imply that:

- the increasing segmentation of the student housing market and the trend towards universities reducing numbers of domestic undergraduates and increasing numbers of international students will raise issues for the capacity of the existing supply of accommodation to meet demand. Because international students have a residential need approaching 100 per cent and home students a lower proportion, demand will rise on top of the extra demand from extra overall numbers
- the growing flux in student preferences for PBSA and off-street housing, and the complexity in the composition of student populations, accommodation types and rent levels make for an increasingly difficult fit between supply and demand
- demand for PBSA at an affordable cost or mid-price point is likely to grow and on current trends is unlikely to be met by adequate supply. With the gap in costs between PBSA and off-street shared housing narrowing, there may be increasing demand pressure for moderately priced PBSA from returning undergraduates
- further new PBSA tilted towards higher-cost/higher-specification provision may not meet the demand profile of new students. This potential mismatch may result in localised voids as student populations change. To be clear, this is not an indication of an overall surplus but is more likely to reflect poorly targeted development in need of a demand-led change of focus
- a preponderance of higher-cost PBSA may pose difficulties for domestic students with low to average incomes and international students on restricted budgets. For these students, high PBSA rents are likely to:
 - deepen the need for bigger parental contributions at a time of intense cost-of-living pressures on household incomes
 - increase student debt
 - mean more students having to take on (more) part-time work to meet living costs. This is likely to have an impact on academic performance, mental health, widening participation and attrition rates

- high rents may have more of a bearing on how would-be students weigh their options: they may become more likely to study from home – or they may decide not to enter higher education at all
- coupled with rising rents and a narrowing gap between prices for PRS and PBSA provision, a static supply of off-street shared private rented housing may have consequences for students' accommodation options. Universities may no longer be safe in their reliance on the private rented market to absorb student demand, if PBSA volume falls short of demand from new students, international students and returning students wanting to remain in or re-enter PBSA
- a combination of increasing competition and an earlier letting cycle could mean students facing more limited housing options (further away/poorer quality) and increasing difficulties in finding off-street shared housing that meets their preferences in terms of cost, location and amenity.

G3 Key messages

G3.1 For Leeds City Council

- a) Purpose-built student accommodation – institutional, private and charitable combined – is catering for the breadth of student housing needs and it is likely more will be needed as other housing options reduce. Almost half (47 per cent) of students living in PBSA provision as a whole are UK undergraduates; and a fifth (20 per cent) are Chinese students. Nearly two-thirds (63 per cent) of students living in university-provided or -commissioned PBSA are UK students; eight per cent are Chinese nationals. There is a demonstrable demand for affordable PBSA provision. However, it is unlikely that PBSA aimed exclusively at high-cost/high-specification provision is meeting current needs or will meet future needs and demand, and there is no discernible need for additional studio flats
- b) There is evidence that the off-street shared housing sector is increasingly providing for the housing needs of people under 35 as a whole. In 2021, there were 6,700 more young working households living in Inner North-West Leeds compared to 2011. There is increasing competition for shared housing between students and young working households. Two-thirds of landlords are geared up for letting to both. Demand for shared housing is increasing but supply is constrained, not least by the Article 4 Directions. Without some increase in supply, rents are likely to carry on rising and the ability of the PRS to meet the needs of young people (students and workers) may decline.
- c) There has been no discernible increase in the number of families or homeowners living in the Inner North-West Leeds area. Any migration of students out of the area correlates with an increase in young working people coming into the area. Prospects for increased home ownership are limited. First-time buyers are hampered by the relatively high prices in the area and current economic conditions and lending criteria. Compared to options in other parts of North Leeds, families looking to buy their own home or to trade up are likely to find the types of property available in INWL unattractive.
- d) Student populations in the outlying areas of Inner North-West Leeds have contracted, but in the wider Hyde Park area have consolidated.

G3.2 For the universities

- a) Only two-thirds of undergraduates are taking up institutional offers of a place in PBSA. This may indicate a mismatch between the current offer and student needs/aspirations

- b) There is no guarantee that the off-street private rented sector will continue to have capacity to house students who do not want or cannot access PBSA provision. The combination of increasing competition from young working households and a changed letting cycle may mean that some students will find it difficult to secure private rented housing that is affordable or of an appropriate quality to meet their requirements
- c) The reduction in the off-street sector and a narrowing rent gap between the off-street sector and PBSA (especially university-provided or -commissioned provision) may result in growing demand for affordable PBSA from returning undergraduates in the future
- d) A preponderance of high-cost/high-specification PBSA provision appears unlikely to be able to meet the housing needs of international students from India, Nigeria and other emerging international markets, who are on a tighter budget. There is a case for development of more affordable PBSA provision and consideration of repurposing older accommodation provision
- e) Continually increasing rents for PBSA and off-street housing have affordability implications for students from low-income households across all domiciles. The private PBSA sector is developing stock that will not meet the affordability and widening access requirements of students and their institutions.

G3.3 For private PBSA providers

- a) The sector's continuing emphasis on provision of high-cost/high-specification rooms is posing affordability problems for many students who want to live in PBSA, and may challenge the assumptions underlying business plans
- b) If, in their international operations, local universities continue to move away from more affluent recruiting grounds and towards less well-off students from emerging markets, a much larger proportion will be unable to afford higher-end PBSA. If this trend gains further traction, there will be a heightened risk of PBSA providers incurring voids in higher-cost stock.

H RECOMMENDATIONS

H1 PBSA supply

- a) There is likely to be a need and demand for more moderately priced PBSA (maybe at a lower specification level). This could be in the shape of creatively-specified new-build or clever and attractive refurbishment of older accommodation to meet demand from returning undergraduates and from international students on restricted incomes. Trialling of double-occupancy rooms for students who might consider sharing to save on cost could also be considered
- b) The universities should consider sharing some of the risk of new PBSA developments through private sector partnerships, which need to be longer term to enable innovation in affordability. In these new partnerships, the focus has to be on rent and affordability
- c) Leeds City Council should, as a matter of policy, consider placing restrictions on approvals of applications for PBSA schemes which consist predominantly or exclusively of studio apartments, and for which there is no demonstrable need
- d) The repurposing of older assets – and particularly empty offices and shops – could have an impact on the availability of accommodation, if strictures on their use were to be relaxed. Students can be important agents of regeneration, if they are given access to affordable accommodation.

H2 Off-street shared housing

- e) Pressure on the off-street private rented market is mounting in light of increasing demand from young working households, growing full-time student populations and the possibility of landlords divesting their stock into the medium term. In this context, there is merit in Leeds City Council undertaking a detailed assessment of the impacts, purpose and application of Article 4 to ensure that supply of shared housing is not overly restricted. Without some such assessment, existing stock may become unable to meet likely demand in the absence of other affordable housing options. The local authority should be more explicit about the flexibility of its approach to avoid landlords being deterred from making application
- f) The conversion of large HMOs into more flexible smaller flats should be encouraged and exempted from the Article 4 Directions
- g) Universities should assess how they will adapt to a declining off-street market and what alternative accommodation options and advice they can provide to students.

H3 Financial intervention and student support

- h) Universities could consider subsidising a proportion of rooms within a residence through alternative means such as offsetting against higher-cost stock
- i) Accommodation bursaries and hardship funds could also be used where there is a lack of affordable options. This is an important short-term approach, even if it serves to help shore up a dysfunctional student maintenance system
- j) There is scope for repurposing older stock that may not be attractive to students under accommodation guarantees and offering it to returning students, increasingly squeezed by other accommodation options
- k) The universities should continue to invest in expert housing advice that addresses individual student problems and provides good quality information to existing and

prospective students. Institutions should be clear with prospective students about accommodation availability and cost. While this openness might be seen as potentially damaging to recruitment, it is likely that students will work this out for themselves anyway, some after an unnecessarily painful experience.

H4 Planning for student accommodation

- l) The universities, together with Leeds City Council, should continue to make annual, realistic assessments of likely future:
- demand for accommodation from their students
 - supply of appropriate housing (both PBSA and off-street private shared housing)²⁹

They should do so in collaboration with other institutions to ensure that a citywide view is taken. All local institutions should be encouraged to participate in this process

- m) The universities should continue to deepen dialogue with Leeds City Council and its Planning Department to help ensure that elected Members and officers have a thorough understanding of student housing in the city and its role in supporting the ongoing success of the universities as major actors in the local economy and housing market
- n) In the longer term, planning policy has a significant part to play in facilitating affordable new development. In the event of an accommodation shortage, supply could be grown more quickly and would alleviate pressure on rents. It is important however, that the Council's Planning Department recognises that some local regulatory provisions – specifically on space standards, higher-specification design and lower density – can all drive higher costs for developers and lead to less affordable provision.

H5 Strategy for meeting the housing needs of young people

- o) Given the difficulties faced by young people generally in finding affordable housing options, the Council should explore the development of a strategy for meeting the housing needs of young people. This could follow on from the current revision of the Strategic Housing Market Assessment (SHMA) for Leeds and should cover:
- young working households on low incomes
 - vulnerable young people
 - students

The strategy should cover access to affordable rented housing, including shared housing (HMOs and flat sharing), social housing, supported housing and low-cost home ownership.

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APPENDIX 1: NOTE ON METHODOLOGY

The methodology used for this study comprises a number of intelligence gathering and research approaches:

- 1 Analysis of recent, current and planned future full-time student numbers. For the University of Leeds and Leeds Beckett University, which make up some 90 per cent of the city's full-time student population, the data were supplied by the institutions themselves in respect of recent, current and planned numbers. These data exclude students on partnership programmes delivered away from Leeds, exchange students away from Leeds, distance learners, students out on placement, students on short courses, students on leave of absence and dormant students. For Leeds Trinity University, relevant data provided by the institution are limited to recent numbers, filtered as for UoL and LBU. Figures for LTU's current and planned numbers are based on a standard projection algorithm, derived from recent numerical patterns in the institution's full-time student population over time. For Leeds Arts University and Leeds Conservatoire, all data are derived from publicly available numbers published by the Higher Education Statistics Agency to 2022. Although they have not been filtered, full-time student absentee numbers are understood to be marginal for LAU and LC. These different approaches to data gathering were adopted in response to different levels of institutional participation, ranging from full to zero.
- 2 Analysis of current PBSA bed space numbers, according to provider type, major accommodation type, geographical location and average rent level. These data are drawn from the Cushman & Wakefield Student Accommodation Tracker (kindly supplied by David Feeney), supplemented by further quantitative and qualitative information provided by the University of Leeds, Leeds Beckett University, Leeds Trinity University and Unipol Student Homes. PBSA pipeline data were also provided by Cushman & Wakefield.
- 3 Analysis of published 2021 and 2011 Census data to map and compare students' accommodation settings; housing tenure within areas of traditional student residence; and the economic activity of residents in these areas.
- 4 Analysis of housing market conditions (house prices, private rents and levels of affordability), including change in the Inner North-West Leeds area and its component sub-areas, and comparison with citywide characteristics and change. Data used for these purposes were drawn from online databases (www.rightmove.co.uk and www.home.co.uk).
- 5 Analysis of key housing and planning policies with an impact on the supply of student accommodation and the management of areas where students live.
- 6 Interviews with local stakeholders, including key officers at the University of Leeds, Leeds Beckett University and Leeds Trinity University, key Council Planning and Housing Officers, private landlords and estate and managing agents.
- 7 Analysis of the term-time addresses of full-time students at the University of Leeds and Leeds Beckett University for 2018/19 and 2022/23. This information was provided by UoL and LBU for these purposes (filtered in the same way as for student number data), and derives from institutional student record systems into which registered students input their details. These data were methodically and systematically reviewed and cleansed before analysis:
 - a) to ensure the type of accommodation entered matched to one of the term-time accommodation type classifications within the HESA taxonomy (TTACCOM)
 - b) to match the addresses recorded to known PBSA (university-provided, university-commissioned through leasing/nomination arrangements and directly-let private PBSA) to ensure that residence in PBSA was accurately recorded and that a standardised naming convention was used to aid analysis

- c) to map addresses using postcode matching to the range of sub-areas used in this study and to enable comparison to the previous study undertaken in 2012
- d) to match addresses using postcode matching to distinguish between private rented housing located in Leeds city centre and private rented housing in other areas, either within the specific sub-areas identified in the 2012 study or in other areas of Inner Leeds or Outer Leeds
- e) to identify and standardise, where possible, students self-reporting as living in their parental home. It should be noted that, in the course of the research, a question emerged as to whether some of the students who recorded that they were living in this setting might have been living informally with other family members or family friends, for which no HESA accommodation classification is available
- f) to identify and standardise, where possible, students self-reporting as living in 'own residence' during term-time. Similarly, a question emerged as to whether some of the students selecting this accommodation setting might have been living in other settings (especially in private rented accommodation), but interpreted this as living in their own home.
- g) to identify and standardise, where possible, students self-reporting as living outside Leeds or the UK. It should be noted that some of the students concerned might have been resident outside the UK at the time of entering the information, but whose situation subsequently changed.

Where possible, data for 2018/19 and 2022/23 were compared to data collected for the study of student housing undertaken by Unipol in 2012.

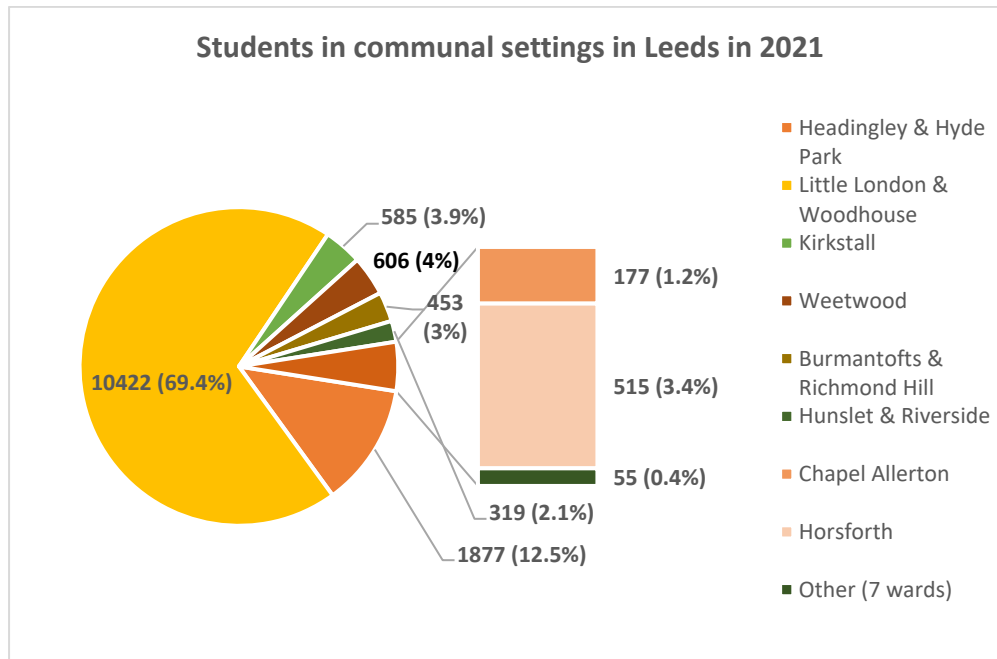
APPENDIX 2 CENSUS DATA

Appendix 2a: Summary of student residential settings by ward 2021

2021 Ward	Communal	All student household	Living alone	Living with parents	Other	ALL	
Headingley & Hyde Park	1,877	13,661	1,015	187	1,921	18,661	30.1%
Little London & Woodhouse	10,422	3,593	1,391	224	911	16,541	26.7%
Kirkstall	585	1,238	180	281	615	2,899	4.7%
Weetwood	606	526	106	319	365	1,922	3.1%
Burmantofts & Richmond Hill	453	428	124	521	364	1,890	3.0%
Hunslet & Riverside	319	317	232	535	388	1,791	2.9%
Gipton & Harehills	0	165	105	1,018	344	1,632	2.6%
Chapel Allerton	177	298	125	541	293	1,434	2.3%
Beeston & Holbeck	5	155	213	475	338	1,186	1.9%
Horsforth	515	72	25	295	147	1,054	1.7%
Armley	4	172	116	378	353	1,023	1.6%
Middleton Park	0	127	32	447	207	813	1.3%
Killingbeck & Seacroft	1	71	52	455	222	801	1.3%
Roundhay	0	60	26	521	166	773	1.2%
Moortown	0	70	31	432	161	694	1.1%
Temple Newsam	0	129	27	339	142	637	1.0%
Bramley & Stanningley	0	79	42	329	168	618	1.0%
Alwoodley	0	61	26	392	123	602	1.0%
Other Wards	45	797	363	4,291	1,577	7,073	11.4%

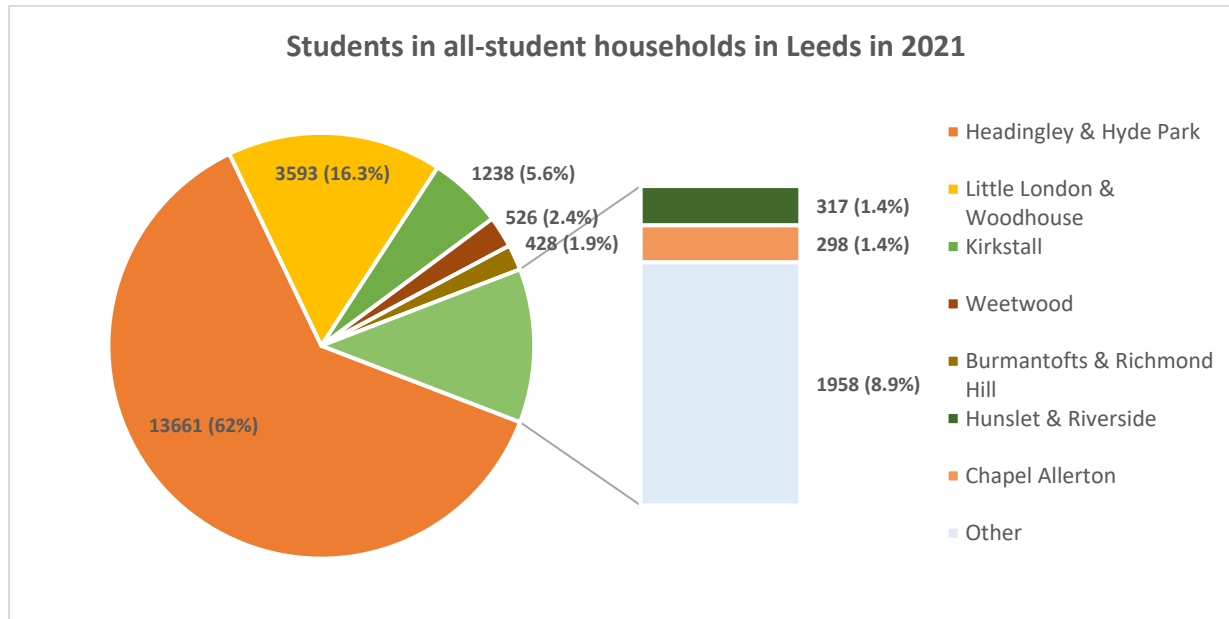
Source: 2021 Census in NOMIS, May 2023

Appendix 2b: Students in communal settings by ward 2021



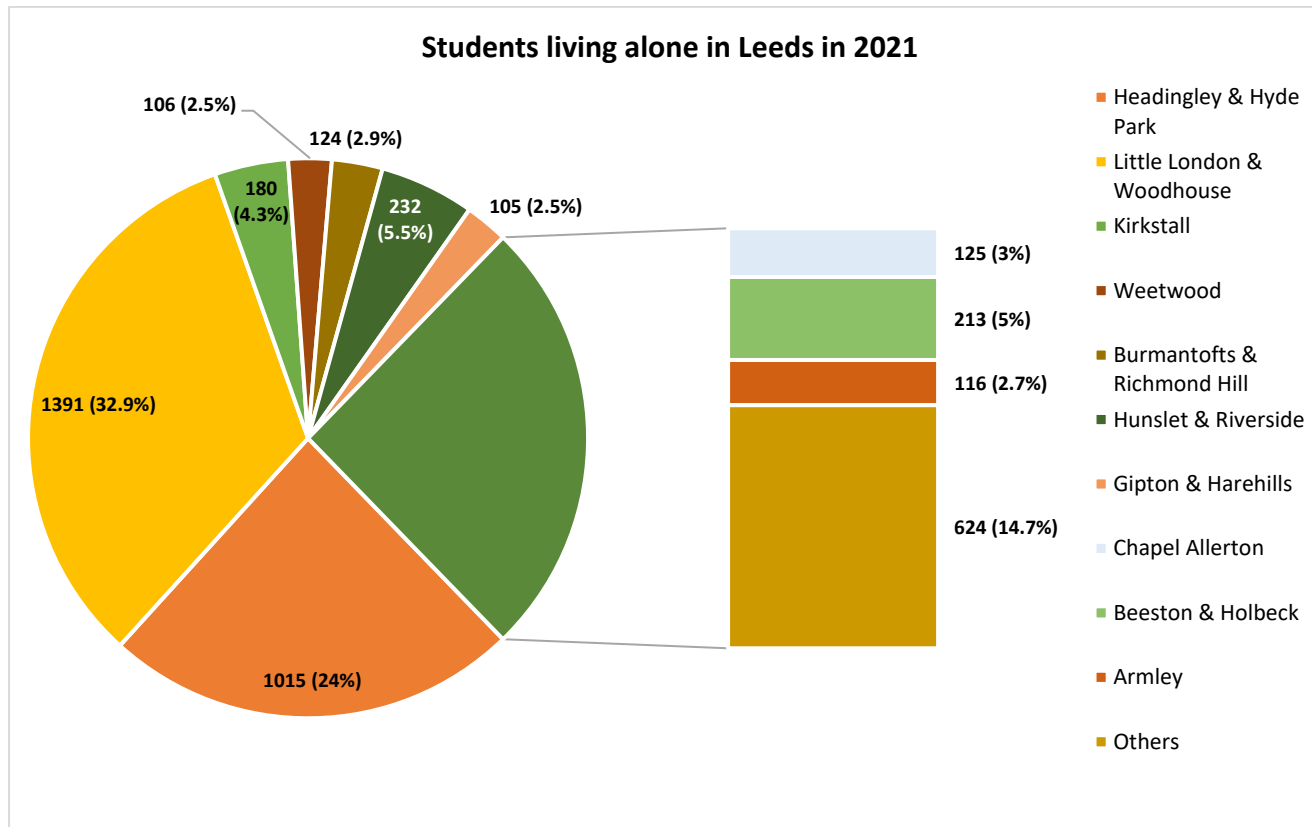
Source: 2021 Census in NOMIS, May 2023

Appendix 2c: Students living in all-student households by ward 2021



Source: 2021 Census in NOMIS, May 2023

Appendix 2d: Students living alone by ward 2021



Source: 2021 Census in NOMIS, May 2023

Appendix 2e: Students living with parents by ward 2021

	Living with parents			Living with parents	
Gipton & Harehills	1,018	8.5%	Ardsley & Robin Hood	324	2.7%
Chapel Allerton	541	4.5%	Weetwood	319	2.7%
Hunslet & Riverside	535	4.5%	Kippax & Methley	311	2.6%
Burmantofts & Richmond Hill	521	4.3%	Morley North	297	2.5%
Roundhay	521	4.3%	Horsforth	295	2.5%
Beeston & Holbeck	475	4.0%	Morley South	287	2.4%
Killingbeck & Seacroft	455	3.8%	Wetherby	283	2.4%
Middleton Park	447	3.7%	Otley & Yeadon	283	2.4%
Moortown	432	3.6%	Kirkstall	281	2.3%
Alwoodley	392	3.3%	Garforth & Swillington	265	2.2%
Armley	378	3.2%	Rothwell	245	2.0%
Guiselley & Rawdon	352	2.9%	Harewood (Leeds)	230	1.9%
Calverley & Farsley	347	2.9%	Farnley & Wortley	225	1.9%
Temple Newsam	339	2.8%	Little London & Woodhouse	224	1.9%
Adel & Wharfedale	330	2.8%	Headingley & Hyde Park	187	1.6%
Bramley & Stanningley	329	2.7%	Cross Gates & Whinmoor	186	1.6%
Pudsey	326	2.7%	ALL	11,980	100.0%

Source: 2021 Census in NOMIS, May 2023

Appendix 2f: Students living in other settings by ward 2021

Ward	Other settings		Ward	Other settings	
Headingley & Hyde Park	1,921	21.8%	Temple Newsam	142	1.6%
Little London & Woodhouse	911	10.3%	Guiseley & Rawdon	139	1.6%
Kirkstall	615	7.0%	Morley South	139	1.6%
Hunslet & Riverside	388	4.4%	Calverley & Farsley	131	1.5%
Weetwood	365	4.1%	Pudsey	127	1.4%
Burmantofts & Richmond Hill	364	4.1%	Alwoodley	123	1.4%
Armley	353	4.0%	Adel & Wharfedale	108	1.2%
Gipton & Harehills	344	3.9%	Morley North	107	1.2%
Beeston & Holbeck	338	3.8%	Cross Gates & Whinmoor	104	1.2%
Chapel Allerton	293	3.3%	Otley & Yeadon	104	1.2%
Killingbeck & Seacroft	222	2.5%	Ardsley & Robin Hood	90	1.0%
Middleton Park	207	2.4%	Kippax & Methley	87	1.0%
Bramley & Stanningley	168	1.9%	Garforth & Swillington	86	1.0%
Roundhay	166	1.9%	Rothwell	83	0.9%
Moortown	161	1.8%	Wetherby	69	0.8%
Horsforth	147	1.7%	Harewood (Leeds)	58	0.7%
Farnley & Wortley	145	1.6%	ALL	8,805	100.0%

Source: 2021 Census in NOMIS, May 2023

Appendix 2g: Wards with the highest percentage of households renting privately 2021

	Owned		Shared ownership		Social rented		Private rented		Total: all households	
	No	%	No	%	No	%	No	%	No	%
Headingley & Hyde Park	1,734	16.8	53	0.5	1,575	15.2	6,962	67.4	10,331	100.0
Little London & Woodhouse	1,288	12.9	43	0.4	3,021	30.2	5,608	56.1	10,000	100.0
Hunslet & Riverside	3,057	25.8	52	0.4	2,797	23.6	5,927	50.0	11,865	100.0
Beeston & Holbeck	4,465	38.2	64	0.5	2,922	25.0	4,181	35.8	11,674	100.0
Gipton & Harehills	3,415	31.9	90	0.8	3,705	34.6	3,450	32.2	10,703	100.0
Kirkstall	3,916	39.8	45	0.5	2,823	28.7	3,034	30.8	9,846	100.0
Armley	4,553	38.5	47	0.4	3,635	30.8	3,544	30.0	11,816	100.0
Burmantofts & Richmond Hill	3,219	26.0	95	0.8	5,373	43.4	3,627	29.3	12,375	100.0
Chapel Allerton	5,097	47.1	61	0.6	2,951	27.3	2,680	24.8	10,817	100.0
Morley South	6,932	62.5	61	0.6	1,489	13.4	2,594	23.4	11,088	100.0
Weetwood	5,683	60.5	41	0.4	1,513	16.1	2,136	22.7	9,398	100.0

Source: 2021 Census in NOMIS, May 2023

Appendix 2h: Wards with the highest percentage of homeowners 2021

	Owned		Shared ownership		Social rented		Private rented		Total: all households	
	No	%	No	%	No	%	No	%	No	%
Little London & Woodhouse	1,288	12.9	43	0.4	3,021	30.2	5,608	56.1	10,000	100.0
Headingley & Hyde Park	1,734	16.8	53	0.5	1,575	15.2	6,962	67.4	10,331	100.0
Hunslet & Riverside	3,057	25.8	52	0.4	2,797	23.6	5,927	50.0	11,865	100.0
Burmantofts & Richmond Hill	3,219	26.0	95	0.8	5,373	43.4	3,627	29.3	12,375	100.0
Gipton & Harehills	3,415	31.9	90	0.8	3,705	34.6	3,450	32.2	10,703	100.0
Beeston & Holbeck	4,465	38.2	64	0.5	2,922	25.0	4,181	35.8	11,674	100.0
Armley	4,553	38.5	47	0.4	3,635	30.8	3,544	30.0	11,816	100.0
Kirkstall	3,916	39.8	45	0.5	2,823	28.7	3,034	30.8	9,846	100.0
Killingbeck & Seacroft	4,977	43.8	121	1.1	4,909	43.2	1,323	11.6	11,376	100.0
Chapel Allerton	5,097	47.1	61	0.6	2,951	27.3	2,680	24.8	10,817	100.0
Middleton Park	5,800	47.7	87	0.7	4,383	36.1	1,819	15.0	12,147	100.0
Bramley & Stanningley	5,574	51.6	73	0.7	3,274	30.3	1,846	17.1	10,810	100.0

Source: 2021 Census in NOMIS, May 2023

Appendix 2i: Changes in housing tenure in Inner North-West Leeds and Leeds city centre: 2011-21

Tenure	Owned/ shared ownership				Social rented				Private rented				All households	
	2011		2021		2011		2021		2011		2021		2011	2021
Beckett Park, Far Headingley, West Park	65%	2,487	65%	2,712	4%	153	5%	209	29%	1,110	30%	1,252	3,826	4,173
Meanwood/Headingley	37%	1,231	39%	1,346	43%	1,431	38%	1,311	19%	632	22%	759	3,328	3,451
Burley	32%	881	27%	812	20%	551	13%	391	47%	1,294	59%	1,774	2,754	3,006
Kirkstall	44%	1,311	44%	1,378	29%	864	26%	814	26%	775	30%	939	2,979	3,131
Central Headingley	23%	721	24%	832	12%	376	12%	416	65%	2,038	64%	2,218	3,136	3,466
Cardigan Triangle	25%	162	27%	185	15%	97	9%	62	59%	383	64%	439	649	686
Headingley Hill	24%	187	23%	190	16%	124	12%	99	57%	443	64%	530	778	828
South Headingley	14%	76	12%	75	11%	60	11%	69	74%	402	77%	483	543	627
Hyde Park	12%	340	13%	421	14%	396	13%	421	74%	2,095	74%	2,398	2,831	3,240
Harolds	17%	96	11%	67	22%	125	20%	123	60%	340	70%	429	566	613
Burley Lodge	17%	113	21%	147	41%	273	35%	244	40%	266	44%	307	665	698
Little Woodhouse	11%	259	8%	222	28%	659	25%	693	59%	1,388	67%	1,857	2,352	2,771
Woodhouse area	14%	748	16%	901	45%	2,403	40%	2,254	39%	2,083	44%	2,479	5,341	5,634
University area	9%	91	6%	39	17%	173	19%	124	74%	752	75%	488	1,016	650
City Centre	16%	739	18%	887	17%	785	19%	936	67%	3,094	63%	3,103	4,618	4,925
INW Leeds	24%	9,442	24%	10,214	22%	8,470	20%	8,165	53%	17,094	56%	19,454	35,382	37,899
Leeds	59%	186,467	58%	196,502	22%	70,377	20%	69,470	18%	57,456	22%	74,399	320,596	341,457

Appendix 2j: Occupation type of households in Leeds by housing tenure 2021

Occupation (current) 2021	Total	Owned		Social rented		Private rented	
1. Managers, directors and senior officials	28,026	21,946	78.3%	1,340	4.8%	4,740	16.9%
2. Professional occupations	50,724	35,796	70.6%	1,938	3.8%	12,990	25.6%
3. Associate professional and technical occupations	29,133	18,850	64.7%	2,052	7.0%	8,231	28.3%
4. Administrative and secretarial occupations	17,694	11,038	62.4%	2,144	12.1%	4,512	25.5%
5. Skilled trades occupations	21,637	13,998	64.7%	2,982	13.8%	4,657	21.5%
6. Caring, leisure and other service occupations	17,883	7,500	41.9%	5,541	31.0%	4,842	27.1%
7. Sales and customer service occupations	13,505	6,016	44.5%	2,854	21.1%	4,635	34.3%
8. Process, plant and machine operatives	16,207	9,191	56.7%	3,579	22.1%	3,437	21.2%
9. Elementary occupations	21,500	7,315	34.0%	7,168	33.3%	7,017	32.6%
Total	216,309	131,650	60.9%	29,598	13.7%	55,061	25.5%

Source: 2021 Census in NOMIS, May 2023

Appendix 2k: Changes in percentage of residents in different occupation types living in each tenure 2011-21

Occupation	Owned		Social rented		Private rented	
	2011	2021	2011	2021	2011	2021
All categories: occupation	64.3%	60.9%	14.1%	13.7%	21.6%	25.5%
1. Managers, directors and senior officials	79.2%	78.3%	5.1%	4.8%	15.7%	16.9%
2. Professional occupations	72.2%	70.6%	4.1%	3.8%	23.7%	25.6%
3. Associate professional and technical occupations	68.1%	64.7%	6.4%	7.0%	25.5%	28.3%
4. Administrative and secretarial occupations	66.4%	62.4%	13.3%	12.1%	20.3%	25.5%
5. Skilled trades occupations	71.3%	64.7%	13.2%	13.8%	15.5%	21.5%
6. Caring, leisure and other service occupations	48.9%	41.9%	28.3%	31.0%	22.8%	27.1%
7. Sales and customer service occupations	46.0%	44.5%	22.8%	21.1%	31.1%	34.3%
8. Process, plant and machine operatives	64.9%	56.7%	21.0%	22.1%	14.2%	21.2%
9. Elementary occupations	40.0%	34.0%	33.2%	33.3%	26.8%	32.6%

Source: 2021 Census in NOMIS, May 2023

Appendix 2I: Economic activity by tenure in Headingley & Hyde Park ward

Economic activity status	Owned		Social rented		Private rented		Total
Economically active in employment	1,215	67.9%	538	34.1%	2,537	36.4%	4,290
Economically active unemployed	19	1.1%	70	4.4%	124	1.8%	213
Economically active and a full-time student	39	2.2%	153	9.7%	2,483	35.6%	2,675
Economically inactive	516	28.8%	817	51.8%	1,825	26.2%	3,158
Total	1,789	100.0%	1,578	100.0%	6,969	100.0%	10,336
	<i>%s are of housing tenure</i>						
Economic activity status	Owned		Social rented		Private rented		Total
Economically active in employment	1,215	28.3%	538	12.5%	2,537	59.1%	4,290
Economically active unemployed	19	8.9%	70	32.9%	124	58.2%	213
Economically active and a full-time student	39	1.5%	153	5.7%	2,483	92.8%	2,675
Economically inactive	516	16.3%	817	25.9%	1,825	57.8%	3,158
Total	1,789	17.3%	1,578	15.3%	6,969	67.4%	10,336
	<i>%s are of economic activity status</i>						

Source: 2021 Census in NOMIS, May 2023

Economically inactive are those aged 16 years and over who did not have a job between 15 March and 21 March 2021 and had not looked for work between 22 February and 21 March 2021 or could not start work within two weeks. This includes people who were retired, looking after a home or family, long-term sick or disabled, and non-full-time students.

Appendix 2m: Economic activity by tenure in Little London & Woodhouse ward

Economic activity status	Owned		Social rented		Private rented		Total
Economically active in employment	950	71.3%	1,253	41.5%	2,976	52.7%	5,179
Economically active unemployed	29	2.2%	171	5.7%	132	2.3%	332
Economically active and a full-time student	28	2.1%	162	5.4%	887	15.7%	1,077
Economically inactive	325	24.4%	1,432	47.4%	1,650	29.2%	3,407
ALL	1,332	100.0%	3,018	100.0%	5,645	100.0%	9,995
	<i>%s are of housing tenure</i>						
Economic activity status	Owned		Social rented		Private rented		Total
Economically active in employment	950	18.3%	1,253	24.2%	2,976	57.5%	5,179
Economically active unemployed	29	8.7%	171	51.5%	132	39.8%	332
Economically active and a full-time student	28	2.6%	162	15.0%	887	82.4%	1,077
Economically inactive	325	9.5%	1,432	42.0%	1,650	48.4%	3,407
ALL	1,332	100.0%	3,018	100.0%	5,645	100.0%	9,995
	<i>%s are of economic activity status</i>						

2021 Census in NOMIS May 2023

Economically inactive are those aged 16 years and over who did not have a job between 15 March to 21 March 2021 and had not looked for work between 22 February to 21 March 2021 or could not start work within two weeks. This includes those retired, looking after a home or family, long-term sick or disabled and non-full-time students.

Appendix 2n: Changes in economic activity status for residents in Inner North-West Leeds 2011-21

	In work				Unemployed				Students				Economically inactive				ALL	
	2011		2021		2011		2021		2011		2021		2011		2021		2011	2021
Beckett Park, Far Headingley, Weetwood	5,394	52.1%	5,839	57.6%	229	2.2%	212	2.1%	3,561	35.1%	1,781	17.6%	1,162	11.5%	2,312	22.8%	10,346	10,144
Meanwood, /Headingley	2,314	54.3%	2,662	53.6%	394	9.2%	236	4.8%	446	9.0%	466	9.4%	1,106	22.3%	1,600	32.2%	4,260	4,964
Central Headingley	1,944	23.9%	2,559	31.4%	223	2.7%	181	2.2%	5,520	67.8%	4,667	57.3%	431	5.3%	736	9.0%	8,118	8,143
	9,652	42.5%	11,060	47.6%	846	3.7%	629	2.7%	9,527	41.0%	6,914	29.7%	2,699	11.6%	4,648	20.0%	22,724	23,251
Hyde Park	1,437	20.3%	1,320	17.2%	245	3.5%	145	1.9%	4,940	64.3%	5,622	73.2%	454	5.9%	593	7.7%	7,076	7,680
South Headingley	407	26.3%	376	20.8%	43	2.8%	25	1.4%	1,015	56.3%	1,305	72.3%	85	4.7%	98	5.4%	1,550	1,804
Headingley Hill	607	27.7%	663	21.7%	52	2.4%	27	0.9%	1,396	45.8%	1,964	64.4%	138	4.5%	396	13.0%	2,193	3,050
	2,451	22.7%	2,359	18.8%	340	3.1%	197	1.6%	7,351	58.6%	8,891	70.9%	677	5.4%	1,087	8.7%	10,819	12,534
Woodhouse	2,775	30.3%	3,251	31.7%	495	5.4%	372	3.6%	4,565	44.5%	4,597	44.8%	1,319	12.9%	2,039	19.9%	9,154	10,259
Little Woodhouse/University	1,482	17.0%	1,701	17.9%	220	2.5%	159	1.7%	6,462	68.1%	6,911	72.8%	537	5.7%	716	7.5%	8,701	9,487
City Centre	3,991	54.4%	3,677	39.1%	189	2.6%	170	1.8%	2,932	31.2%	5,192	55.3%	223	2.4%	357	3.8%	7,335	9,396
Kirkstall	3,165	60.1%	3,401	58.4%	270	5.1%	189	3.2%	870	14.9%	732	12.6%	965	16.6%	1,500	25.8%	5,270	5,822
Burley	3,235	46.9%	3,699	47.9%	397	5.8%	295	3.8%	2,425	31.4%	2,567	33.2%	838	10.8%	1,167	15.1%	6,895	7,728
	26,751	37.7%	29,148	37.1%	2,757	3.9%	2,011	2.6%	34,132	43.5%	35,804	45.6%	7,258	9.2%	11,514	14.7%	70,898	78,477

Source: 2021 Census in NOMIS, May 2023

Appendix 2o: Changes in economic activity status for private rented households in Inner North-West Leeds 2011-21

Area	In work				Students				Unemployed				Economically inactive				ALL	
	2011		2021		2011		2021		2011		2021		2011		2021		2011	2021
Beckett Park, Far Headingley, Weetwood, Meanwood Headingley	1457	68.3%	1546	72.4%	323	15.2%	242	11.3%	79	3.7%	50	2.3%	273	12.8%	298	14.0%	2132	2136
Central Headingley	1,463	51.6%	871	37.4%	1,070	37.7%	1,020	43.9%	66	2.3%	44	1.9%	239	8.4%	391	16.8%	2,838	2,326
Hyde Park, South Headingley, Headingley Hill	1,802	47.0%	879	24.8%	1,417	37.0%	1,825	51.5%	76	2.0%	49	1.4%	539	14.1%	789	22.3%	3,834	3,542
Woodhouse	914	41.2%	929	43.8%	687	31.0%	642	30.3%	69	3.1%	61	2.9%	547	24.7%	488	23.0%	2,217	2,120
Little Woodhouse/University	870	41.3%	763	31.1%	744	35.3%	997	40.7%	48	2.3%	31	1.3%	447	21.2%	659	26.9%	2,109	2,450
City Centre	2,221	69.3%	1,857	58.7%	513	16.0%	679	21.5%	63	2.0%	51	1.6%	406	12.7%	575	18.2%	3,203	3,162
Kirkstall	688	74.7%	735	76.6%	115	12.5%	86	9.0%	24	2.6%	24	2.5%	94	10.2%	114	11.9%	921	959
Burley	1,230	59.6%	1,287	55.4%	499	24.2%	605	26.1%	92	4.5%	61	2.6%	243	11.8%	369	15.9%	2,064	2,322
All Inner NW Leeds	9,182	55.7%	7,996	47.9%	4,298	26.1%	5,076	30.4%	451	2.7%	327	2.0%	2,549	15.3%	3,292	19.7%	16,480	16,691

Source: 2021 Census in NOMIS, May 2023

Appendix 2p: Changes in the number and proportion of people aged 16-35 in work living in Inner North-West Leeds 2011-21

2022 ward	Population		16-24 in work				25-35 in work				16-35 in work			
	2011	2021	2011		2021		2011		2021		2011		2021	
Inner North-West Leeds														
Headingley & Hyde Park	20,533	32,459	1,258	6.1%	2,065	6.4%	1,400	6.8%	2,752	8.5%	2,658	12.9%	4,817	14.8%
Little London & Woodhouse	25,914	37,849	959	3.7%	1,393	3.7%	1,574	6.1%	3,276	8.7%	2,533	9.8%	4,669	12.3%
Kirkstall	21,709	22,223	1,207	5.6%	1,408	6.3%	2,662	12.3%	3,893	17.5%	3,869	17.8%	5,301	23.9%
Weetwood	22,375	21,542	915	4.1%	996	4.6%	2,158	9.6%	3,065	14.2%	3,073	13.7%	4,061	18.9%
All INWL	90,531	114,073	4,339	4.8%	5,862	5.1%	7,794	8.6%	12,986	11.4%	12,133	13.4%	18,848	16.5%

Source: 2021 Census in NOMIS, May 2023

Change 2011-21	16-24 in work		25-24 in work		16-34 in work	
	No.	%	No.	%	No.	%
Inner North-West Leeds						
Headingley & Hyde Park	807	0.2%	1,352	1.7%	2,159	1.9%
Little London & Woodhouse	434	0.0%	1,702	2.6%	2,136	2.6%
Kirkstall	201	0.8%	1,231	5.3%	1,432	6.0%
Weetwood	81	0.5%	907	4.6%	988	5.1%
All INWL	1,523	0.3%	5,192	2.8%	6,715	3.1%

Source: 2021 Census in NOMIS, May 2023

The data for Headingley, Hyde Park, Woodhouse and Little London is approximate due to ward boundary changes between 2011 and 2021

APPENDIX 3 HOUSING MARKET DATA

Appendix 3a: Changes in house prices 2012-23

	Detached		Semi-detached				Terraced			Flat			ALL		
	2012	2023		2012	2023		2012	2023		2012	2023		2012	2023	
LS6 Hyde Park, Woodhouse, Headingley	£282,918	£455,833	61.1%	£190,455	£355,537	86.7%	£170,725	£333,901	95.6%	£134,104	£249,312	85.9%	£179,825	£310,362	72.6%
LS5 Kirkstall	£185,933	£326,125	75.4%	£163,636	£268,889	64.3%	£124,379	£215,555	73.3%	£103,508	£116,816	12.9%	£139,429	£220,962	58.5%
LS4 Burley		£275,000		£164,988	£251,282	52.3%	£140,603	£233,458	66.0%	£140,360	£165,037	17.6%	£147,883	£212,068	43.4%
LS3 Little Woodhouse/University							£128,873	£350,549	172.0%	£107,147	£205,539	91.8%	£116,464	£251,374	115.8%
LS2 City centre/University	£125,000	£550,000	340.0%	£90,995	£369,950	306.6%	£164,983	£355,550	115.5%	£140,430	£179,976	28.2%	£139,936	£225,147	39.5%
LS16 West Park, Far Headingley, Weetwood	£391,381	£629,948	61.0%	£223,065	£398,467	78.6%	£194,327	£324,099	66.8%	£124,692	£225,184	80.6%	£244,816	£455,016	85.9%
Inner North-West Leeds	£246,308	£447,381	81.6%	£166,628	£328,825	97.3%	£153,982	£302,185	96.2%	£125,040	£190,311	52.2%	£161,392	£279,155	69.9%
Leeds	£309,183	£491,745	59.0%	£163,573	£273,066	66.9%	£124,681	£204,767	64.2%	£131,942	£213,252	61.6%	£167,336	£277,221	65.7%

Source: www.rightmove.co.uk 2023 and www.Home.co.uk 2023

Appendix 3b: Changes in house prices in Inner North-West Leeds: May 2022 – May 2023

	Detached			Semi-detached			Terraced			Flat			ALL		
	2022	2023		2022	2023		2022	2023		2022	2023		2022	2023	
LS6 Hyde Park, Woodhouse, Headingley	£474,667	£455,833	-4.0%	£360,330	£355,537	-1.3%	£377,756	£333,901	-11.6%	£167,450	£249,312	48.9%	£285,252	£310,362	8.8%
LS5 Kirkstall	£400,000	£326,125	-18.5%	£298,970	£268,889	-10.1%	£220,000	£215,555	-2.0%	£123,618	£116,816	-5.5%	£218,987	£220,962	0.9%
LS4 Burley		£275,000		£250,990	£251,282	0.1%	£257,142	£233,458	-9.2%	£136,928	£165,037	20.5%	£198,640	£212,068	6.8%
LS3 Little Woodhouse/ University							£355,249	£350,549	-1.3%	£222,793	£205,539	-7.7%	£290,133	£251,374	-13.4%
LS2 City centre/University	£550,000	£550,000	0.0%	£369,950	£369,950	0.0%	£295,000	£355,550	20.5%	£147,409	£179,976	22.1%	£154,864	£225,147	45.4%
LS16 West Park, Far Headingley, Weetwood	£651,294	£629,948	-3.3%	£316,716	£398,467	25.8%	£440,833	£324,099	-26.5%	£178,975	£225,184	25.8%	£388,893	£455,016	17.0%
Inner North-West Leeds	£518,990	£447,381	-13.8%	£319,391	£328,825	3.0%	£324,330	£302,185	-6.8%	£162,862	£190,311	16.9%	£256,128	£279,155	9.0%
Leeds	£527,806	£491,745	-6.8%	£274,569	£273,066	-0.5%	£217,112	£204,767	-5.7%	£170,661	£213,252	25.0%	£265,945	£277,221	4.2%

Source: www.rightmove.co.uk 2023 and www.Home.co.uk 2023

Appendix 3c Changes in entry-level house prices in Inner North-West Leeds 2012-23

	2012	2023	
LS6 Hyde Park, Woodhouse, Headingley	£152,415	£291,607	91.3%
LS5 Kirkstall	£113,944	£166,186	45.8%
LS4 Burley	£140,482	£199,248	41.8%
LS3 Little Woodhouse/University	£116,510	£278,044	138.6%
LS2 City centre/University	£152,707	£267,763	75.3%
LS16 West Park, Far Headingley, Weetwood	£159,510	£274,642	72.2%
Inner North-West Leeds	£139,511	£246,248	76.5%
Leeds	£128,312	£209,010	62.9%

Source: www.rightmove.co.uk 2023 and www.Home.co.uk 2023

Entry level prices are for one- and two-bedroom terraced houses and flats

Appendix 3d: Affordability of house prices 2023

Area	1-bed			2-bed			3-bed			>3-bed			ALL		
	Price	Income required	Deposit required	Price	Income required	Deposit required	Price	Income required	Deposit required	Price	Income required	Deposit required	Price	Income required	Deposit required
LS6 Hyde Park, Woodhouse, Headingley	£136,451	£44,016	£13,645	£240,985	£77,737	£24,099	£337,061	£108,729	£33,706	£417,040	£134,529	£41,704	£310,362	£100,117	£31,036
LS5 Kirkstall	£90,849	£29,306	£9,085	£165,041	£53,239	£16,504	£273,419	£88,200	£27,342	£334,375	£107,863	£33,438	£220,962	£71,278	£22,096
LS4 Burley	£129,583	£41,801	£12,958	£184,453	£59,501	£18,445	£243,627	£78,589	£24,363	£275,750	£88,952	£27,575	£212,068	£68,409	£21,207
LS3 Little Woodhouse/University	£171,041	£55,175	£17,104	£279,998	£90,322	£28,000							£251,374	£81,088	£25,137
LS2 City centre/University	£142,896	£46,095	£14,290	£261,422	£84,330	£26,142	£400,000	£129,032	£40,000				£225,147	£72,628	£22,515
LS16 West Park, Far Headingley, Weetwood	£97,083	£31,317	£9,708	£236,046	£76,144	£23,605	£335,383	£108,188	£33,538	£725,102	£233,904	£72,510	£455,016	£146,779	£45,502
Inner North-West Leeds	£127,984	£41,285	£12,798	£227,991	£73,545	£22,799	£317,898	£102,548	£31,790	£438,067	£141,312	£43,807	£279,155	£90,050	£27,915
Area	Detached			Semi-detached			Terraced			Flat			ALL		
	Price	Income required	Deposit required	Price	Income required	Deposit required	Price	Income required	Deposit required	Price	Income required	Deposit required	Price	Income required	Deposit required
LS6 Hyde Park, Woodhouse, Headingley	£455,833	£147,043	£45,583	£355,537	£114,689	£35,554	£333,901	£107,710	£33,390	£249,312	£80,423	£24,931	£310,362	£100,117	£31,036
LS5 Kirkstall	£326,125	£105,202	£32,613	£268,889	£86,738	£26,889	£215,555	£69,534	£21,556	£116,816	£37,683	£11,682	£220,962	£71,278	£22,096
LS4 Burley	£275,000	£88,710	£27,500	£251,282	£81,059	£25,128	£233,458	£75,309	£23,346	£165,037	£53,238	£16,504	£212,068	£68,409	£21,207
LS3 Little Woodhouse/University							£350,549	£113,080	£35,055	£205,539	£66,303	£20,554	£251,374	£81,088	£25,137
LS2 City centre/University	£550,000	£177,419	£55,000	£369,950	£119,339	£36,995	£355,550	£114,694	£35,555	£179,976	£58,057	£17,998	£225,147	£72,628	£22,515
LS16 West Park, Far Headingley, Weetwood	£629,948	£203,209	£62,995	£398,467	£128,538	£39,847	£324,099	£104,548	£32,410	£225,184	£72,640	£22,518	£455,016	£146,779	£45,502
Inner North-West Leeds	£447,381	£144,317	£44,738	£328,825	£106,073	£32,883	£302,185	£97,479	£30,219	£190,311	£61,391	£19,031	£279,155	£90,050	£27,915

Source: www.rightmove.co.uk 2023 and www.Home.co.uk 2023

Appendix 3e: Changes in private rents: 2012-23

	Room			1-bed			2-bed			3-bed			>3-bed			All		
	2012	2023		2012	2023		2012	2023		2012	2023		2012	2023		2012	2023	
LS6 Hyde Park, Woodhouse, Headingley	£301	£476	58%	£492	£606	23%	£589	£763	30%	£764	£1,177	54%	£775	£1,847	138%	£489	£974	99%
LS5 Kirkstall	£288	£519	80%	£488	£630	29%	£450	£838	86%	£550	£1,258	129%	£750	£1,843	146%	£483	£1,018	111%
LS4 Burley	£295	£502	70%	£475	£800	68%	£676	£1,037	53%	£762	£1,378	81%	£750	£1,683	124%	£467	£1,080	131%
LS3 Little Woodhouse/University	£246	£481	96%	£448	£845	89%	£561	£1,112	98%	£573	£1,210	111%	£750	£1,769	136%	£454	£1,083	139%
LS2 City centre/University	£246	£523	113%	£448	£861	92%	£561	£1,294	131%	£573	£1,716	199%	£750	£1,918	156%	£454	£1,262	178%
LS16 West Park, Far Headingley, Weetwood	£300	£506	69%	£519	£773	49%	£650	£1,275	96%	£750	£1,440	92%	£795	£2,136	169%	£585	£1,226	110%
Inner North-West Leeds	£279	£486	74%	£478	£753	57%	£581	£1,053	81%	£662	£1,363	106%	£762	£1,866	145%	£489	£1,107	127%
Leeds	£273	£463	70%	£495	£775	57%	£650	£975	50%	£573	£1,261	120%	£995	£2,037	105%	£843	£1,200	42%

Source: [Home.co.uk](https://www.home.co.uk) May 2023 www.rightmove.co.uk May 2023 and previous housing market studies for Inner North-West Leeds

Appendix 3f: Rents for rooms in shared houses in Inner North-West Leeds

	No of Lettings	Average rent	Average excl bills	Average incl bills	Average difference (excl-incl)		% aimed at students only	% aimed at students or professionals	% aimed at professionals only
					pw	pcm			
LS6 (Headingley, Hyde Park, Woodhouse area)	379	£476	£403	£527	£28.62	£124	35%	64%	1%
LS16 (Beckett Park, Far Headingley area)	5	£506	£506	NA	NA	NA	0%	100%	0%
LS5 (Kirkstall area)	20	£519	£435	£568	£30.69	£133	35%	55%	10%
LS3 (Burley area)	75	£502	£430	£546	£26.77	£116	17%	69%	14%
LS3 (Little Woodhouse/University area)	60	£482	£445	£531	£19.85	£86	2%	88%	10%
LS2 (University, City centre area)	50	£523	£475	£560	£19.62	£85	42%	54%	4%
Inner North-West Leeds	589	£486	£439	£546	£24.69	£107	29%	67%	5%

Source: www.Rightmove.co.uk, 2-3 June 2023

Appendix 3g: Affordability of private rents

	Room		1-bed		2-bed		3-bed		>3-bed		All	
	Rent	Income needed	Rent	Income needed	Rent	Income needed	Rent	Income needed	Rent	Income needed	Rent	Income needed
LS6 Hyde Park, Woodhouse, Headingley	£476	£14,280	£606	£18,180	£763	£22,890	£1,177	£35,310	£1,847	£55,410	£974	£29,220
LS5 Kirkstall	£519	£15,570	£630	£18,900	£838	£25,140	£1,258	£37,740	£1,843	£55,290	£1,018	£30,540
LS4 Burley	£502	£15,060	£800	£24,000	£1,037	£31,110	£1,378	£41,340	£1,683	£50,490	£1,080	£32,400
LS3 Little Woodhouse/University	£481	£14,430	£845	£25,350	£1,112	£33,360	£1,210	£36,300	£1,769	£53,070	£1,083	£32,490
LS2 City centre/University	£523	£15,690	£861	£25,830	£1,294	£38,820	£1,716	£51,480	£1,918	£57,540	£1,262	£37,860
LS16 West Park, Far Headingley, Weetwood	£506	£15,180	£773	£23,190	£1,275	£38,250	£1,440	£43,200	£2,136	£64,080	£1,226	£36,780
Inner North-West Leeds	£486	£14,580	£753	£22,575	£1,053	£31,595	£1,363	£40,895	£1,866	£55,980	£1,107	£33,215
Leeds	£463	£13,890	£775	£23,250	£975	£29,250	£1,261	£37,830	£2,037	£61,110	£1,200	£36,000

Source: [Home.co.uk](https://www.home.co.uk), May 2023 www.rightmove.co.uk, May 2023 plus numerous websites outlining calculation bases for affordability

APPENDIX 4 PURPOSE-BUILT STUDENT ACCOMMODATION

Appendix 4a PBSA developments opening in 2023 – 2024 (Source – ANUK/Unipol National Codes)

Operator	Development	Address	Beds	New beds
CRM	The Leatherworks	Meanwood Road, LS7 2DZ	456	0
CRM	Briggate Studios	12, The Briggate, LS1 6AA	86	86
Here Student	Leonardo Building	2 Rossington Street, LS2 8HD	473	473
Homes for Students	Terry Frost Building	Whitelock Street, LS7 1AL	410	410
University of Leeds/Unipol	Carlton Hill	Carlton Hill	606	368
				1337

Appendix 4b PBSA pipeline for Leeds (courtesy of Cushman & Wakefield Accommodation Tracker)

Address	Postcode	Planning application number	Application date	Status	Total beds	Studios	Clusters	Applicant	Anticipated opening	Under construction
Technology Campus, Cookridge Street	LS2 9JT	19/02841/FU	May-19	Approved	465	89	376	Leeds City College / Metropolitan & District Securities	Jun-24	Under construction
Former Santander UK plc, 44 Merrion Street	LS2 8JQ	20/01965/FU	Apr-20	Approved	660	87	573	Scape Student Living	Aug-24	Under construction
Merrion Way	LS2 8PA	20/08033/FU	Dec-20	Approved	705	209	496	Olympian Homes Ltd	Aug-24	Yet to commence
The Millwright Building, Millwright Street	LS2 7QG	21/9/00038/MOD	Feb-21	Approved	251	251	0	Global Projects Consultancy Ltd	Nov-25	Yet to commence
Lisbon Square, Lisbon Street	LS1 4LY	21/05142/FU	Jun-21	Approved	548	138	410	Leeds City Council	Jun-27	Yet to commence
26-34 Merrion Street	LS2 8JG	21/06759/FU	Sep-21	Approved	88	88	0	Q Investment Partners	Sep-24	Yet to commence
10-81 Kirkstall Road	LS3 1LH	21/08190/FU	Oct-21	Approved	362	29	333	Clarion Housing Group	Sep-25	Yet to commence
24-28 Great George Street	LS1 3DL	21/08693/FU	Oct-21	Approved	67	67	0	Stirling Prescient (No.2) Ltd	Oct-24	Yet to commence
Sheepscar Grove	LS7	22/00009/FU	Jan-22	Approved	355	117	238	MBU Capital	Jan-25	Yet to commence

Address	Postcode	Planning application number	Application date	Status	Total beds	Studios	Clusters	Applicant	Anticipated opening	Under construction
115-126 Briggate, 8-9 Kirkgate, 7 Fish Street	LS1 6LX	22/01721/LI	Mar-22	Approved	124	90	34	Orchard Street Investment Management LLP	Sep-24	Yet to commence
20 Merrion Way, land fronting Clay Pit Lane	LS1	22/01889/FU	Mar-22	Approved	1204	482	722	Downing Developments	Aug-24	Yet to commence
Churchill House, 17 Wellington Street,	LS1 4DL	22/02133/FU	Mar-22	Approved	50	50	0	Infinity Construction Enterprise Ltd	Sep-24	Yet to commence
King House, 17 Regent Street	LS2 7UZ	22/01940/FU	Apr-22	Approved	402	402	0	Primus Property Group	Sep-24	Yet to commence
Grand Central Place, 140-142 Briggate	LS1 6BR	22/00774/FU	Jan-22	Approved	369	131	238	Leeds City Council	Jan-26	Yet to commence
Former Yorkshire Post Site, Wellington Street	LS1 1RF	22/04895/FU	Jul-22	Approved	1763	192	1571	Urbanite	Jun-27	Yet to commence
Exchange Court, 2 West Way	LS1 4AX	22/06306/FU	Sep-22	Approved	250	250	0	The Exchange Building Leeds & The Exchange Leeds	Jul-25	Yet to commence
17-21 Cookridge Street	LS2 3AG	22/07437/FU	Nov-22	Submitted	33	31	2	YPP	Oct-24	Yet to commence
Headrow Court, Park Cross Street	LS1 2QH	23/00597/FU	Feb-23	Submitted	108	108	0	L&S Leeds Ltd	Feb-25	Yet to commence
Soyo Block D, Quarry Hill	LS2 7BT	23/00747/FU	Feb-23	Submitted	291	181	110	Quarry Hill Developments Ltd	Aug-24	Yet to commence
Land Including, 16-22 Burley Street	LS3 1LD	23/02335/FU	Apr-23	Submitted	183	183	0	Torsion Group Ltd	Feb-26	Yet to commence

APPENDIX 5 STUDENT ACCOMMODATION RENTS AND AFFORDABILITY

Appendix 5a: Room rents – differences between overall PBSA and the off-street sector 2023

Off-street PRS/PBSA overall	All INWL		City centre/ University area		Little Woodhouse area		Headingley, Hyde Park, Woodhouse		Burley area		Kirkstall area		Far Headingley, Beckett Park area	
	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost PBSA overall (UoL)	£7,018	£7,018	£7,018	£7,018	£7,018	£7,018	£7,018	£7,018	£7,018	£7,018	£7,018	£7,018	£7,018	£7,018
Difference per year (PRS to PBSA)	£-466	£-1,750	£-298	£-1,750	£-646	£-1,678	£-694	£-2,182	£-466	£-1,858	£-202	£-1,798	£338	£-946
Difference per month (PRS to PBSA)	£-39	£-146	£-25	£-146	£-54	£-140	£-58	£-182	£-39	£-155	£-17	£-150	£28	£-79
Difference per week (PRS to PBSA)	£-9	£-34	£-6	£-34	£-12	£-32	£-13	£-42	£-9	£-36	£-4	£-35	£7	£-18
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost PBSA overall (LBU)	£7,148	£7,148	£7,148	£7,148	£7,148	£7,148	£7,148	£7,148	£7,148	£7,148	£7,148	£7,148	£7,148	£7,148
Difference per year (PRS to PBSA)	£-596	£-1,880	£-428	£-1,880	£-776	£-1,808	£-824	£-2,312	£-596	£-1,988	£-332	£-1,928	£208	£-1,076
Difference per month (PRS to PBSA)	£-50	£-157	£-36	£-157	£-65	£-151	£-69	£-193	£-50	£-166	£-28	£-161	£17	£-90
Difference per week (PRS to PBSA)	£-11	£-36	£-8	£-36	£-15	£-35	£-16	£-44	£-11	£-38	£-6	£-37	£4	£-21
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost PBSA overall (direct-let)	£9,896	£9,896	£9,896	£9,896	£9,896	£9,896	£9,896	£9,896	£9,896	£9,896	£9,896	£9,896	£9,896	£9,896
Difference per year (PRS to PBSA)	£-3,344	£-4,628	£-3,176	£-4,628	£-3,524	£-4,556	£-3,572	£-5,060	£-3,344	£-4,736	£-3,080	£-4,676	£-2,540	£-3,824
Difference per month (PRS to PBSA)	£-279	£-386	£-265	£-386	£-294	£-380	£-298	£-422	£-279	£-395	£-257	£-390	£-212	£-319
Difference per week (PRS to PBSA)	£-64	£-89	£-61	£-89	£-68	£-88	£-69	£-97	£-64	£-91	£-59	£-90	£-49	£-74
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost overall PBSA	£8,021	£8,021	£8,021	£8,021	£8,021	£8,021	£8,021	£8,021	£8,021	£8,021	£8,021	£8,021	£8,021	£8,021
Difference per year (PRS to PBSA)	£-1,469	£-2,753	£-1,301	£-2,753	£-1,649	£-2,681	£-1,697	£-3,185	£-1,469	£-2,861	£-1,205	£-2,801	£-665	£-1,949
Difference per month (PRS to PBSA)	£-122	£-229	£-108	£-229	£-137	£-223	£-141	£-265	£-122	£-238	£-100	£-233	£-55	£-162
Difference per week (PRS to PBSA)	£-28	£-53	£-25	£-53	£-32	£-52	£-33	£-61	£-28	£-55	£-23	£-54	£-13	£-37

Appendix 5b: Room rents – differences between standard PBSA and the off-street sector 2023

Off-street PRS/standard PBSA	All INWL		City centre/ University area		Little Woodhouse area		Headingley, Hyde Park, Woodhouse		Burley area		Kirkstall area		Far Headingley, Beckett Park area	
	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost standard PBSA (UoL)	£5,843	£5,843	£5,843	£5,843	£5,843	£5,843	£5,843	£5,843	£5,843	£5,843	£5,843	£5,843	£5,843	£5,843
Difference per year (PRS to PBSA)	£709	-£575	£877	-£575	£529	-£503	£481	-£1,007	£709	-£683	£973	-£623	£1,513	£229
Difference per month (PRS to PBSA)	£59	-£48	£73	-£48	£44	-£42	£40	-£84	£59	-£57	£81	-£52	£126	£19
Difference per week (PRS to PBSA)	£14	-£11	£17	-£11	£10	-£10	£9	-£19	£14	-£13	£19	-£12	£29	£4
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost standard PBSA (LBU)	£5,642	£5,642	£5,642	£5,642	£5,642	£5,642	£5,642	£5,642	£5,642	£5,642	£5,642	£5,642	£5,642	£5,642
Difference per year (PRS to PBSA)	£910	-£374	£1,078	-£374	£730	-£302	£682	-£806	£910	-£482	£1,174	-£422	£1,714	£430
Difference per month (PRS to PBSA)	£76	-£31	£90	-£31	£61	-£25	£57	-£67	£76	-£40	£98	-£35	£143	£36
Difference per week (PRS to PBSA)	£18	-£7	£21	-£7	£14	-£6	£13	-£16	£18	-£9	£23	-£8	£33	£8
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost standard PBSA (direct-let)	£5,597	£5,597	£5,597	£5,597	£5,597	£5,597	£5,597	£5,597	£5,597	£5,597	£5,597	£5,597	£5,597	£5,597
Difference per year (PRS to PBSA)	£955	-£329	£1,123	-£329	£775	-£257	£727	-£761	£955	-£437	£1,219	-£377	£1,759	£475
Difference per month PRS to PBSA)	£80	-£27	£94	-£27	£65	-£21	£61	-£63	£80	-£36	£102	-£31	£147	£40
Difference per week PRS to PBSA)	£18	-£6	£22	-£6	£15	-£5	£14	-£15	£18	-£8	£23	-£7	£34	£9
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost all standard PBSA	£5,694	£5,694	£5,694	£5,694	£5,694	£5,694	£5,694	£5,694	£5,694	£5,694	£5,694	£5,694	£5,694	£5,694
Difference per year (PRS to PBSA)	£858	-£426	£1,026	-£426	£678	-£354	£630	-£858	£858	-£534	£1,122	-£474	£1,662	£378

Difference per month (PRS to PBSA)	£72	-£36	£86	-£36	£57	-£30	£53	-£72	£72	-£45	£94	-£40	£139	£32
Difference per week (PRS to PBSA)	£17	-£8	£20	-£8	£13	-£7	£12	-£17	£17	-£10	£22	-£9	£32	£7

Appendix 5c: Room rents – differences between ensuite PBSA and the off-street sector 2023

OSPRS/Ensuite PBSA	All INWL		City centre/University area		Little Woodhouse area		Headingley, Hyde Park, Woodhouse		Burley area		Kirkstall area		Far Headingley, Beckett Park area	
	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost ensuite PBSA (UoL)	£7,598	£7,598	£7,598	£7,598	£7,598	£7,598	£7,598	£7,598	£7,598	£7,598	£7,598	£7,598	£7,598	£7,598
Difference per year (PRS to PBSA)	-£1,046	-£2,330	-£878	-£2,330	-£1,226	-£2,258	-£1,274	-£2,762	-£1,046	-£2,438	-£782	-£2,378	-£242	-£1,526
Difference per month (PRS to PBSA)	-£87	-£194	-£73	-£194	-£102	-£188	-£106	-£230	-£87	-£203	-£65	-£198	-£20	-£127
Difference per week (PRS to PBSA)	-£20	-£45	-£17	-£45	-£24	-£43	-£25	-£53	-£20	-£47	-£15	-£46	-£5	-£29
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost ensuite PBSA (LBU)	£7,781	£7,781	£7,781	£7,781	£7,781	£7,781	£7,781	£7,781	£7,781	£7,781	£7,781	£7,781	£7,781	£7,781
Difference per year (PRS to PBSA)	-£1,229	-£2,513	-£1,061	-£2,513	-£1,409	-£2,441	-£1,457	-£2,945	-£1,229	-£2,621	-£965	-£2,561	-£425	-£1,709
Difference per month (PRS to PBSA)	-£102	-£209	-£88	-£209	-£117	-£203	-£121	-£245	-£102	-£218	-£80	-£213	-£35	-£142
Difference per week (PRS to PBSA)	-£24	-£48	-£20	-£48	-£27	-£47	-£28	-£57	-£24	-£50	-£19	-£49	-£8	-£33
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost ensuite PBSA (direct-let)	£8,368	£8,368	£8,368	£8,368	£8,368	£8,368	£8,368	£8,368	£8,368	£8,368	£8,368	£8,368	£8,368	£8,368
Difference per year (PRS to PBSA)	-£1,816	-£3,100	-£1,648	-£3,100	-£1,996	-£3,028	-£2,044	-£3,532	-£1,816	-£3,208	-£1,552	-£3,148	-£1,012	-£2,296
Difference per month (PRS to PBSA)	-£151	-£258	-£137	-£258	-£166	-£252	-£170	-£294	-£151	-£267	-£129	-£262	-£84	-£191
Difference per week (PRS to PBSA)	-£35	-£60	-£32	-£60	-£38	-£58	-£39	-£68	-£35	-£62	-£30	-£61	-£19	-£44
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost all ensuite PBSA	£7,916	£7,916	£7,916	£7,916	£7,916	£7,916	£7,916	£7,916	£7,916	£7,916	£7,916	£7,916	£7,916	£7,916
Difference per year (PRS to PBSA)	-£1,364	-£2,648	-£1,196	-£2,648	-£1,544	-£2,576	-£1,592	-£3,080	-£1,364	-£2,756	-£1,100	-£2,696	-£560	-£1,844
Difference per month (PRS to PBSA)	-£114	-£221	-£100	-£221	-£129	-£215	-£133	-£257	-£114	-£230	-£92	-£225	-£47	-£154
Difference per week (PRS to PBSA)	-£26	-£51	-£23	-£51	-£30	-£50	-£31	-£59	-£26	-£53	-£21	-£52	-£11	-£35

Appendix 5d Differences between PBSA Studio Room rents and Off Street PRS Room rents 2023

OFPRS/Studio PBSA	All INWL		City centre/ University area		Little Woodhouse area		Headingley, Hyde Park, Woodhouse		Burley area		Kirkstall area		Far Headingley, Beckett Park area	
	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills	Including bills	Excluding bills
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost studio PBSA (UoL)	£8,338	£8,338	£8,338	£8,338	£8,338	£8,338	£8,338	£8,338	£8,338	£8,338	£8,338	£8,338	£8,338	£8,338
Difference per year (PRS to PBSA)	-£1,786	-£3,070	-£1,618	-£3,070	-£1,966	-£2,998	-£2,014	-£3,502	-£1,786	-£3,178	-£1,522	-£3,118	-£982	-£2,266
Difference per month (PRS to PBSA)	-£149	-£256	-£135	-£256	-£164	-£250	-£168	-£292	-£149	-£265	-£127	-£260	-£82	-£189
Difference per week (PRS to PBSA)	-£34	-£59	-£31	-£59	-£38	-£58	-£39	-£67	-£34	-£61	-£29	-£60	-£19	-£44
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost studio PBSA (LBU)	£10,425	£10,425	£10,425	£10,425	£10,425	£10,425	£10,425	£10,425	£10,425	£10,425	£10,425	£10,425	£10,425	£10,425
Difference per year (PRS to PBSA)	-£3,873	-£5,157	-£3,705	-£5,157	-£4,053	-£5,085	-£4,101	-£5,589	-£3,873	-£5,265	-£3,609	-£5,205	-£3,069	-£4,353
Difference per month (PRS to PBSA)	-£323	-£430	-£309	-£430	-£338	-£424	-£342	-£466	-£323	-£439	-£301	-£434	-£256	-£363
Difference per week (PRS to PBSA)	-£74	-£99	-£71	-£99	-£78	-£98	-£79	-£107	-£74	-£101	-£69	-£100	-£59	-£84
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost studio PBSA (direct-let)	£14,136	£14,136	£14,136	£14,136	£14,136	£14,136	£14,136	£14,136	£14,136	£14,136	£14,136	£14,136	£14,136	£14,136
Difference per year (PRS to PBSA)	-£7,584	-£8,868	-£7,416	-£8,868	-£7,764	-£8,796	-£7,812	-£9,300	-£7,584	-£8,976	-£7,320	-£8,916	-£6,780	-£8,064
Difference per month (PRS to PBSA)	-£632	-£739	-£618	-£739	-£647	-£733	-£651	-£775	-£632	-£748	-£610	-£743	-£565	-£672
Difference per week (PRS to PBSA)	-£146	-£171	-£143	-£171	-£149	-£169	-£150	-£179	-£146	-£173	-£141	-£171	-£130	-£155
Average off-street annual rent	£6,552	£5,268	£6,720	£5,268	£6,372	£5,340	£6,324	£4,836	£6,552	£5,160	£6,816	£5,220	£7,356	£6,072
Average cost all studio PBSA	£10,966	£10,966	£10,966	£10,966	£10,966	£10,966	£10,966	£10,966	£10,966	£10,966	£10,966	£10,966	£10,966	£10,966
Difference per year (PRS to PBSA)	-£4,414	-£5,698	-£4,246	-£5,698	-£4,594	-£5,626	-£4,642	-£6,130	-£4,414	-£5,806	-£4,150	-£5,746	-£3,610	-£4,894
Difference per month (PRS to PBSA)	-£368	-£475	-£354	-£475	-£383	-£469	-£387	-£511	-£368	-£484	-£346	-£479	-£301	-£408
Difference per week (PRS to PBSA)	-£85	-£110	-£82	-£110	-£88	-£108	-£89	-£118	-£85	-£112	-£80	-£111	-£69	-£94

APPENDIX 6 STUDENT ADDRESS DATA

Appendix 6a: Accommodation type by Level of study – all students 2018/19

	Year 1 UG		Year 2 UG		Year 3 UG		Year 4+ UG		All UG returners		PGR		PGT		All PGs		ALL	
University-maintained/leased	5,020	30.6%	205	1.8%	156	1.8%	40	1.2%	401	1.7%	28	1.2%	561	7.8%	589	6.1%	6,010	12.1%
Private sector halls – leased/nominated	5,467	33.3%	248	2.1%	115	1.3%	20	0.6%	383	1.6%	24	1.0%	465	6.5%	489	5.1%	6,339	12.8%
Private sector halls direct-lets	1,591	9.7%	677	5.8%	443	5.1%	105	3.2%	1,225	5.2%	171	7.1%	2,672	37.1%	2,843	29.6%	5,659	11.4%
Other private rented	1,403	8.5%	8,107	69.6%	5,771	66.1%	2,623	81.2%	16,501	69.9%	1,186	49.5%	1,965	27.3%	3,151	32.8%	21,055	42.4%
Other private rented – city centre	376	2.3%	299	2.6%	359	4.1%	105	3.2%	763	3.2%	234	9.8%	282	3.9%	516	5.4%	1,655	3.3%
Parental/Guardian home – in Leeds	550	3.4%	463	4.0%	365	4.2%	42	1.3%	870	3.7%	60	2.5%	163	2.3%	223	2.3%	1,643	3.3%
Parental/Guardian home – outside Leeds	1,155	7.0%	914	7.8%	876	10.0%	154	4.8%	1,944	8.2%	85	3.5%	340	4.7%	425	4.4%	3,524	7.1%
Own residence – in Leeds	228	1.4%	260	2.2%	198	2.3%	16	0.5%	474	2.0%	144	6.0%	179	2.5%	323	3.4%	1,025	2.1%
Own residence – outside Leeds	276	1.7%	238	2.0%	217	2.5%	27	0.8%	482	2.0%	168	7.0%	235	3.3%	403	4.2%	1,161	2.3%
Own/Parental home – in Leeds	80	0.5%	32	0.3%	23	0.3%	11	0.3%	66	0.3%	41	1.7%	15	0.2%	56	0.6%	202	0.4%
Own/Parental home – outside Leeds	270	1.6%	203	1.7%	210	2.4%	89	2.8%	502	2.1%	257	10.7%	327	4.5%	584	6.1%	1,356	2.7%
	16,416	100%	11,646	100%	8,733	100%	3,232	100%	23,611	100%	2,398	100%	7,204	100%	9,602	100%	49,629	100%

Appendix 6b: Accommodation type by level of study – all students 2022/23

	Year 1 UG		Year 2 UG		Year 3 UG		Year 4+ UG		All UG returners		PGR		PGT		All PGs		ALL	
University-maintained/leased	3,868	25.6%	310	2.5%	143	1.5%	50	1.8%	503	2.0%	80	3.7%	850	7.6%	930	7.0%	5,301	10.0%
Private sector halls – leased/nominated	5,588	37.1%	649	5.2%	163	1.7%	36	1.3%	848	3.4%	57	2.7%	878	7.9%	935	7.0%	7,371	13.9%
Private sector halls – direct-lets	1,269	8.4%	932	7.5%	760	8.0%	109	4.0%	1,801	7.3%	166	7.7%	3,843	34.5%	4,009	30.2%	7,079	13.4%
Other private rented	1,324	8.8%	7,907	63.8%	5,714	60.2%	2,084	75.9%	15,705	63.8%	854	39.9%	2,472	22.2%	3,326	25.0%	20,355	38.4%
Other private rented – city centre	318	2.1%	364	2.9%	554	5.8%	139	5.1%	1,057	4.3%	238	11.1%	415	3.7%	653	4.9%	2,028	3.8%
Parental/Guardian home – in Leeds	687	4.6%	586	4.7%	526	5.5%	54	2.0%	1,166	4.7%	46	2.1%	323	2.9%	369	2.8%	2,222	4.2%
Parental/Guardian home – outside Leeds	1,208	8.0%	939	7.6%	972	10.2%	108	3.9%	2,019	8.2%	57	2.7%	554	5.0%	611	4.6%	3,838	7.2%
Own residence – in Leeds	87	0.6%	87	0.7%	95	1.0%	17	0.6%	199	0.8%	93	4.3%	152	1.4%	245	1.8%	531	1.0%
Own residence – outside Leeds	156	1.0%	123	1.0%	135	1.4%	20	0.7%	278	1.1%	175	8.2%	316	2.8%	491	3.7%	925	1.7%
Own/Parental home – outside Leeds	577	3.8%	502	4.0%	425	4.5%	127	4.6%	1,054	4.3%	376	17.6%	1,350	12.1%	1,726	13.0%	3,357	6.3%
ALL	15,082	100%	12,399	100%	9,487	100%	2,744	100%	24,630	100%	2,142	100%	11,153	100%	13,295	100%	53,007	100%

Appendix 6c: Accommodation type by level of study – University of Leeds students 2018/19

	Year 1 UG		Year 2 UG		Year 3 UG		Year 4+ UG		All UG returners		PGR		PGT		All PGs		ALL	
University-maintained	4,707	46.3%	205	2.8%	156	3.3%	40	1.3%	401	2.7%	28	1.3%	561	9.4%	589	7.2%	5,697	17.0%
Private sector halls – leased/nominated	2,417	23.8%	101	1.4%	67	1.4%	19	0.6%	187	1.2%	23	1.0%	419	7.1%	442	5.4%	3,046	9.1%
Private sector halls – direct-lets	1,015	10.0%	521	7.2%	321	6.8%	103	3.2%	945	6.3%	170	7.8%	2,614	44.0%	2,784	34.2%	4,744	14.2%
Other private rented	872	8.6%	5,455	75.7%	3,404	71.8%	2,612	82.3%	11,471	75.9%	1,124	51.3%	1,536	25.9%	2,660	32.7%	15,003	44.9%
Other private rented – city centre	294	2.9%	191	2.7%	222	4.7%	105	3.3%	518	3.4%	217	9.9%	213	3.6%	430	5.3%	1,242	3.7%
Parental/Guardian home – in Leeds	157	1.5%	136	1.9%	110	2.3%	36	1.1%	282	1.9%	55	2.5%	95	1.6%	150	1.8%	589	1.8%
Parental/Guardian home – outside Leeds	286	2.8%	320	4.4%	261	5.5%	150	4.7%	731	4.8%	85	3.9%	99	1.7%	194	2.4%	1,211	3.6%
Own residence – in Leeds	75	0.7%	71	1.0%	45	0.9%	11	0.3%	127	0.8%	90	4.1%	38	0.6%	128	1.6%	330	1.0%
Own residence – outside Leeds	101	1.0%	55	0.8%	50	1.1%	20	0.6%	125	0.8%	120	5.5%	72	1.2%	192	2.4%	418	1.3%
Own/Parental home – in Leeds	63	0.6%	25	0.3%	10	0.2%	11	0.3%	37	0.2%	39	1.8%	8	0.1%	47	0.6%	147	0.4%
Own/Parental home – outside Leeds	182	1.8%	125	1.7%	96	2.0%	67	2.1%	288	1.9%	248	11.3%	285	4.8%	533	6.5%	1,003	3.0%
	10,169	100%	7,205	100%	4,742	100%	3,174	100%	15,112	100%	2,199	100%	5,940	100%	8,149	100%	33,430	100%

Appendix 6d: Accommodation type by level of study – University of Leeds students 2022/23

	Year 1 UG		Year 2 UG		Year 3 UG		Year 4+ UG		All UG returners		PGR		PGT		All PGs		ALL	
University-maintained	3,844	41.0%	304	3.9%	141	2.5%	50	1.9%	495	3.1%	80	4.2%	837	11.9%	917	10.2%	5,256	15.2%
Private sector halls – leased/nominated	2,966	31.6%	270	3.5%	112	2.0%	32	1.2%	414	2.6%	54	2.8%	679	9.6%	733	8.2%	4,113	11.9%
Private sector halls – direct-lets	697	7.4%	759	9.7%	645	11.4%	107	4.0%	1,511	9.3%	165	8.6%	3,460	49.2%	3,625	40.5%	5,833	16.9%
Other private rented	647	6.9%	5,351	68.4%	3,671	64.7%	2,041	76.5%	11,063	68.4%	799	41.7%	1,033	14.7%	1,832	20.5%	13,542	39.3%
Other private rented – city centre	259	2.8%	276	3.5%	399	7.0%	136	5.1%	811	5.0%	222	11.6%	268	3.8%	490	5.5%	1,560	4.5%
Parental/Guardian home – in Leeds	168	1.8%	142	1.8%	128	2.3%	47	1.8%	317	2.0%	18	0.9%	63	0.9%	81	0.9%	566	1.6%
Parental/Guardian home – outside Leeds	377	4.0%	303	3.9%	275	4.8%	98	3.7%	676	4.2%	34	1.8%	137	1.9%	171	1.9%	1,224	3.5%
Own residence – in Leeds	57	0.6%	53	0.7%	51	0.9%	16	0.6%	120	0.7%	88	4.6%	23	0.3%	111	1.2%	288	0.8%
Own Residence – outside Leeds	89	0.9%	84	1.1%	69	1.2%	19	0.7%	172	1.1%	171	8.9%	45	0.6%	216	2.4%	477	1.4%
Own/Parental home – outside Leeds	268	2.9%	279	3.6%	186	3.3%	122	4.6%	588	3.6%	286	14.9%	494	7.0%	780	8.7%	1,636	4.7%
	9,372	100%	7,821	100%	5,677	100%	2,668	100%	16,167	100%	1,917	100%	7,039	100%	8,956	100%	34,495	100%

Appendix 6e: Accommodation type by Level of study – Leeds Beckett University students 2018/19

	Year 1 UG		Year 2 UG		Year 3 UG		Year 4+ UG		All UG returners		PGR		PGT		All PGs		ALL	
University-maintained/leased	313	5.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	313	1.9%
Private sector halls – leased/nominated	3,050	48.8%	147	3.3%	48	1.2%	1	1.7%	196	2.3%	1	0.5%	46	3.6%	47	3.2%	3,293	20.3%
Private sector halls – direct-lets	576	9.2%	156	3.5%	122	3.1%	2	3.4%	280	3.3%	1	0.5%	58	4.6%	59	4.0%	915	5.6%
Other private rented	531	8.5%	2,652	59.7%	2,367	59.3%	11	19.0%	5,030	59.2%	62	31.2%	429	33.9%	491	33.6%	6,052	37.4%
Other private rented – city centre	82	1.3%	108	2.4%	137	3.4%	0	0.0%	245	2.9%	17	8.5%	69	5.5%	86	5.9%	413	2.5%
Parental/Guardian home – in Leeds	393	6.3%	327	7.4%	255	6.4%	6	10.3%	588	6.9%	5	2.5%	68	5.4%	73	5.0%	1,054	6.5%
Parental/Guardian home – outside Leeds	869	13.9%	594	13.4%	615	15.4%	4	6.9%	1,213	14.3%	0	0.0%	241	19.1%	241	16.5%	2,323	14.3%
Own residence – in Leeds	153	2.4%	189	4.3%	153	3.8%	5	8.6%	347	4.1%	54	27.1%	141	11.2%	195	13.3%	695	4.3%
Own residence – outside Leeds	175	2.8%	183	4.1%	167	4.2%	7	12.1%	357	4.2%	48	24.1%	163	12.9%	211	14.4%	743	4.6%
Own/Parental home – in Leeds	17	0.3%	7	0.2%	13	0.3%	0	0.0%	20	0.2%	2	1.0%	7	0.6%	9	0.6%	46	0.3%
Own/Parental home – outside Leeds	88	1.4%	78	1.8%	114	2.9%	22	37.9%	214	2.5%	9	4.5%	42	3.3%	51	3.5%	353	2.2%
	6,247	100.0%	4,441	100.0%	3,991	100.0%	58	100.0%	8,490	100.0%	199	100.0%	1,264	100.0%	1,463	100%	16,200	100%

Appendix 6f: Accommodation type by level of study – Leeds Beckett University students 2022/23

	Year 1 UG		Year 2 UG		Year 3 UG		Year 4+ UG		All UG returners		PGR		PGT		All PGs		ALL	
University-maintained/leased	24	0.4%	6	0.1%	2	0.1%	0	0.0%	8	0.1%	0	0.0%	13	0.3%	13	0.3%	45	0.2%
Private sector halls – leased/nominated	2,622	45.9%	379	8.3%	51	1.3%	4	5.3%	434	5.1%	3	1.3%	199	4.8%	202	4.7%	3,258	17.6%
Private sector halls – direct-lets	572	10.0%	173	3.8%	115	3.0%	2	2.6%	290	3.4%	1	0.4%	383	9.3%	384	8.8%	1,246	6.7%
Other private rented	677	11.9%	2,556	55.8%	2,043	53.6%	43	56.6%	4,642	54.8%	55	24.4%	1,439	35.0%	1,494	34.4%	6,813	36.8%
Other private rented – city centre	59	1.0%	88	1.9%	155	4.1%	3	3.9%	246	2.9%	16	7.1%	147	3.6%	163	3.8%	468	2.5%
Parental/Guardian home – in Leeds	519	9.1%	444	9.7%	398	10.4%	7	9.2%	849	10.0%	28	12.4%	260	6.3%	288	6.6%	1,656	8.9%
Parental/Guardian home – outside Leeds	831	14.6%	636	13.9%	697	18.3%	10	13.2%	1,343	15.9%	23	10.2%	417	10.1%	440	10.1%	2,614	14.1%
Own residence – in Leeds	30	0.5%	34	0.7%	44	1.2%	1	1.3%	79	0.9%	5	2.2%	129	3.1%	134	3.1%	243	1.3%
Own residence – outside Leeds	67	1.2%	39	0.9%	66	1.7%	1	1.3%	106	1.3%	4	1.8%	271	6.6%	275	6.3%	448	2.4%
Own/Parental home – outside Leeds	309	5.4%	223	4.9%	239	6.3%	5	6.6%	467	5.5%	90	40.0%	856	20.8%	946	21.8%	1,722	9.3%
	5,710	100.0%	4,578	100.0%	3,810	100.0%	76	100.0%	8,464	100.0%	225	100.0%	4,114	100%	4,339	100.0%	18,513	100.0%

Appendix 6g: Changes in accommodation type residence 2018/19 – 2022/23 and 2011/12 - 2022/23

	2018/19		2022/23		<i>Difference 2018/19 – 2022/23</i>	
University-maintained	6,010	12.1%	5,301	10.0%	-709	-11.8%
PBSA-leased/nominated	6,339	12.8%	7,371	13.9%	1,032	16.3%
PBSA – direct-let	5,659	11.4%	7,079	13.4%	1,420	25.1%
Off-street private rented	21,055	42.4%	20,355	38.4%	-700	-3.3%
City centre rented	1,655	3.3%	2,028	3.8%	373	22.5%
Parental home	1,643	3.3%	2,222	4.2%	579	35.2%
Own home	1,218	2.5%	531	1.0%	-687	-56.4%
Outside Leeds	6,051	12.2%	8,121	15.3%	2,070	34.2%
ALL	49,630	100%	53,008	100%	3,378	6.8%

	2012		2018/19		2022/23		<i>Difference 2012 – 2022/23</i>	
University/PBSA	19175	40.0%	18008	36.3%	19751	37.3%	576	3.0%
Private rented	17885	37.3%	21055	42.4%	20355	38.4%	2470	13.8%
City centre private rented	1504	3.1%	1655	3.3%	2028	3.8%	524	34.8%
Own/Parental home	2085	4.3%	2861	5.8%	2753	5.2%	668	32.0%
Outside Leeds	5281	11.0%	6051	12.2%	8121	15.3%	2840	53.8%
ALL	47942	100%	49630	100%	53008	100%	5066	10.6%

Appendix 6h: Accommodation types by major domicile level of study – all students 2022/23

	University		PBSA – leased/nominations		PBSA – direct-lets		Private rented city centre		Other private rented		Own/Parental home		Not known		ALL
UK undergraduates	2,692	8.4%	5,130	16.0%	1,399	4.4%	409	1.3%	15,630	48.6%	6,872	21.4%	7	0.0%	32,139
UK research postgraduates	2	0.2%	7	0.6%	23	2.1%	88	7.9%	440	39.7%	541	48.8%	8	0.7%	1,109
UK taught postgraduates	8	0.4%	75	3.5%	142	6.6%	85	3.9%	815	37.6%	985	45.5%	55	2.5%	2,165
EU undergraduates	245	24.1%	142	14.0%	95	9.4%	63	6.2%	405	39.9%	62	6.1%	3	0.3%	1,015
EU research postgraduates	1	1.1%	3	3.3%	2	2.2%	16	17.6%	37	40.7%	25	27.5%	7	7.7%	91
EU taught postgraduates	13	14.9%	17	19.5%	8	9.2%	5	5.7%	28	32.2%	14	16.1%	2	2.3%	87
International undergraduates	1,401	21.4%	976	14.9%	1,598	24.4%	922	14.1%	990	15.1%	622	9.5%	30	0.5%	6,539
International research postgraduates	77	8.2%	47	5.0%	141	15.0%	135	14.3%	376	39.9%	128	13.6%	39	4.1%	943
International taught postgraduates	816	9.1%	819	9.2%	3,679	41.2%	328	3.7%	1,622	18.2%	1,614	18.1%	43	0.5%	8,921
ALL	5,255	9.9%	7,216	13.6%	7,087	13.4%	2,051	3.9%	20,343	38.4%	10,863	20.5%	194	0.4%	53,009

Appendix 6i: Accommodation types by major domicile/level of study – all students 2018/19

	University		PBSA – leased/nominations		PBSA – direct-lets		Private rented city centre		Other private rented		Own/parental home		Not known		ALL
UK undergraduates	3,308	9.7%	5,393	15.8%	1,781	5.2%	357	1.0%	16,692	49.0%	6,505	19.1%	1	0.0%	34,037
UK research postgraduates	1	0.1%	4	0.3%	21	1.6%	117	9.0%	561	43.4%	580	44.8%	10	0.8%	1,294
UK taught postgraduates	14	0.6%	33	1.5%	128	5.7%	76	3.4%	973	43.1%	1,032	45.7%	0	0.0%	2,256
EU undergraduates	516	37.5%	192	13.9%	185	13.4%	40	2.9%	368	26.7%	71	5.2%	5	0.4%	1,377
EU research postgraduates	1	0.4%	4	1.4%	19	6.7%	53	18.7%	156	54.9%	49	17.3%	2	0.7%	284
EU taught postgraduates	9	2.3%	18	4.5%	118	29.6%	38	9.5%	151	37.8%	65	16.3%	0	0.0%	399
International undergraduates	1,284	28.5%	555	12.3%	840	18.7%	742	16.5%	858	19.1%	214	4.8%	9	0.2%	4,502
International research postgraduates	26	3.0%	19	2.2%	136	15.5%	164	18.7%	455	51.8%	77	8.8%	2	0.2%	879
International taught postgraduates	540	11.8%	431	9.4%	2,432	53.0%	169	3.7%	841	18.3%	178	3.9%	1	0.0%	4,592
ALL	5,699	11.5%	6,649	13.4%	5,660	11.4%	1,756	3.5%	21,055	42.4%	8,771	17.7%	30	0.1%	49,620

Appendix 6j: Accommodation types by major domicile/level of study – University of Leeds students 2022/23

2022/23	University		PBSA – leased/nominations		PBSA – direct-lets		Private rented city centre		Other private rented		Own/Parental home		Not known		ALL
UK undergraduates	2,692	14.3%	2,361	12.6%	648	3.4%	229	1.2%	10,561	56.2%	2,303	12.2%	7	0.0%	18,801
UK research postgraduates	2	0.2%	7	0.7%	23	2.4%	76	8.0%	413	43.6%	418	44.1%	8	0.8%	947
UK taught postgraduates	8	0.8%	47	4.6%	105	10.2%	41	4.0%	463	45.0%	311	30.2%	55	5.3%	1,030
EU undergraduates	245	27.0%	127	14.0%	77	8.5%	44	4.9%	360	39.7%	51	5.6%	3	0.3%	907
EU research postgraduates	1	1.1%	3	3.4%	2	2.3%	16	18.2%	37	42.0%	22	25.0%	7	8.0%	88
EU taught postgraduates	13	36.1%	7	19.4%	4	11.1%	0	0.0%	7	19.4%	3	8.3%	2	5.6%	36
International undergraduates	1,401	24.1%	871	15.0%	1,475	25.4%	793	13.6%	793	13.6%	448	7.7%	30	0.5%	5,811
International research postgraduates	77	8.7%	44	5.0%	140	15.9%	129	14.6%	350	39.6%	104	11.8%	39	4.4%	883
International taught postgraduates	816	13.6%	645	10.8%	3,338	55.7%	225	3.8%	560	9.3%	366	6.1%	43	0.7%	5,993
ALL	5,255	15.2%	4,112	11.9%	5,812	16.8%	1,553	4.5%	13,544	39.3%	4,026	11.7%	194	0.6%	34,496

Appendix 6k: Accommodation types by major domicile/level of study – University of Leeds students 2018/19

	University		PBSA – leased/nominations		PBSA – direct-lets		Private rented city centre		Other private rented		Own/Parental home		Not known		ALL
UK undergraduates	3,308	16.6%	1,972	9.9%	998	5.0%	191	1.0%	11,307	56.8%	2,116	10.6%	1	0.0%	19,893
UK research postgraduates	1	0.1%	4	0.3%	20	1.7%	109	9.5%	529	46.3%	470	41.1%	10	0.9%	1,143
UK taught postgraduates	14	1.1%	8	0.6%	109	8.6%	47	3.7%	658	51.7%	437	34.3%	0	0.0%	1,273
EU undergraduates	516	43.9%	124	10.6%	154	13.1%	21	1.8%	294	25.0%	61	5.2%	5	0.4%	1,175
EU research postgraduates	1	0.4%	3	1.1%	18	6.6%	51	18.6%	154	56.2%	45	16.4%	2	0.7%	274
EU taught postgraduates	9	2.6%	10	2.9%	106	30.9%	32	9.3%	129	37.6%	57	16.6%	0	0.0%	343
International undergraduates	1,284	31.2%	507	12.3%	807	19.6%	600	14.6%	742	18.0%	162	3.9%	9	0.2%	4,111
International research postgraduates	26	3.1%	16	1.9%	134	15.9%	157	18.7%	441	52.4%	65	7.7%	2	0.2%	841
International taught postgraduates	540	12.4%	401	9.2%	2,399	54.9%	135	3.1%	749	17.2%	142	3.3%	1	0.0%	4,367
ALL	5,699	17.1%	3,045	9.1%	4,745	14.2%	1,343	4.0%	15,003	44.9%	3,555	10.6%	30	0.1%	33,420

Appendix 6I: Accommodation types by major domicile/level of study – Leeds Beckett University students 2022/23

	University		PBSA – leased/nominations		PBSA – direct-lets		Private rented city centre		Other private rented		Own/Parental home		Not known		ALL
	0	0.0%													
UK undergraduates	0	0.0%	2,769	20.8%	751	5.6%	180	1.3%	5,069	38.0%	4,569	34.3%	0	0.0%	13,338
UK research postgraduates	0	0.0%	0	0.0%	0	0.0%	12	7.4%	27	16.7%	123	75.9%	0	0.0%	162
UK taught postgraduates	0	0.0%	28	2.5%	37	3.3%	44	3.9%	352	31.0%	674	59.4%	0	0.0%	1,135
EU undergraduates	0	0.0%	15	13.9%	18	16.7%	19	17.6%	45	41.7%	11	10.2%	0	0.0%	108
EU research postgraduates	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	3	100.0%	0	0.0%	3
EU taught postgraduates	0	0.0%	10	19.6%	4	7.8%	5	9.8%	21	41.2%	11	21.6%	0	0.0%	51
International undergraduates	0	0.0%	105	14.4%	123	16.9%	129	17.7%	197	27.1%	174	23.9%	0	0.0%	728
International research postgraduates	0	0.0%	3	5.0%	1	1.7%	6	10.0%	26	43.3%	24	40.0%	0	0.0%	60
International taught postgraduates	0	0.0%	174	5.9%	341	11.6%	103	3.5%	1,062	36.3%	1,248	42.6%	0	0.0%	2,928
ALL	0	0.0%	3,104	16.8%	1,275	6.9%	498	2.7%	6,799	36.7%	6,837	36.9%	0	0.0%	18,513

Appendix 6m: Accommodation types by major domicile/level of study – Leeds Beckett University students 2018/19

	University		PBSA – leased/nominations		PBSA – direct-lets		Private rented city centre		Other private rented		Own/Parental home		Not known		ALL
	0	0.0%													
UK undergraduates	0	0.0%	3,421	24.2%	783	5.5%	166	1.2%	5,385	38.1%	4,389	31.0%	0	0.0%	14,144
UK research postgraduates	0	0.0%	0	0.0%	1	0.7%	8	5.3%	32	21.2%	110	72.8%	0	0.0%	151
UK taught postgraduates	0	0.0%	25	2.5%	19	1.9%	29	3.0%	315	32.0%	595	60.5%	0	0.0%	983
EU undergraduates	0	0.0%	68	33.7%	31	15.3%	19	9.4%	74	36.6%	10	5.0%	0	0.0%	202
EU research postgraduates	0	0.0%	1	10.0%	1	10.0%	2	20.0%	2	20.0%	4	40.0%	0	0.0%	10
EU taught postgraduates	0	0.0%	8	14.3%	12	21.4%	6	10.7%	22	39.3%	8	14.3%	0	0.0%	56
International undergraduates	0	0.0%	48	12.3%	33	8.4%	142	36.3%	116	29.7%	52	13.3%	0	0.0%	391
International research postgraduates	0	0.0%	3	7.9%	2	5.3%	7	18.4%	14	36.8%	12	31.6%	0	0.0%	38
International taught postgraduates	0	0.0%	30	13.3%	33	14.7%	34	15.1%	92	40.9%	36	16.0%	0	0.0%	225
ALL	0	0.0%	3,604	22.2%	915	5.6%	413	2.5%	6,052	37.4%	5,216	32.2%	0	0.0%	16,200

Appendix 6n: Occupancy of PBSA schemes 2023

Accommodation	Provider	Capacity	New undergraduates		Returning undergraduates		Postgraduates		ALL	Occupancy
Alexander Court	Unipol	59	1	3.4%	7	24.1%	21	72.4%	29	49.2%
Algernon Firth	HELLO Student	114	14	16.5%	16	18.8%	55	64.7%	85	74.6%
Altus House (IQ)	iQ	752	141	21.7%	178	27.4%	330	50.8%	649	86.3%
Arena Village (Central Village)	Campus Living Villages	1,521	1,335	86.0%	181	11.7%	37	2.4%	1,553	102.1%
Asa Briggs House	Student Castle	264	42	13.8%	43	14.1%	219	72.0%	304	115.2%
Asquith House & Austin Hall	Asquith House & Austin Hall	298	54	26.9%	34	16.9%	113	56.2%	201	67.4%
Blenheim Point	S Harrison Group	180	2	1.0%	2	1.0%	193	98.0%	197	109.4%
Broadcasting Tower	Unite	240	199	89.2%	19	8.5%	5	2.2%	223	92.9%
Brotherton House	Study Inn	161	12	16.7%	5	6.9%	55	76.4%	72	44.7%
Burley Road (Leeds Student Village)	Campus Living Villages	556	125	27.5%	103	22.7%	226	49.8%	454	81.7%
Carnegie Village	UPP	459	337	89.9%	30	8.0%	8	2.1%	375	81.7%
Carr Mills	Njoy	298	7	26.9%	9	34.6%	10	38.5%	26	8.7%
Cityside	Downing Students	477	358	72.0%	105	21.1%	34	6.8%	497	104.2%
Clarence Dock	Unite	613	484	88.3%	43	7.8%	21	3.8%	548	89.4%
Concept Place	Unite	391	67	19.2%	76	21.8%	206	59.0%	349	89.3%
Eldon Court	Northend Management	280	10	7.4%	33	24.4%	92	68.1%	135	48.2%
Garden House	Unipol	40	3	15.0%	10	50.0%	7	35.0%	20	50.0%
Grayson Heights	Unipol	110	6	5.9%	8	7.9%	87	86.1%	101	91.8%
Hepworth Lodge/Liberty Park	Unite	564	254	64.0%	58	14.6%	85	21.4%	397	70.4%
Hyde Park Road	Almero Student	38	2	9.5%	18	85.7%	1	4.8%	21	55.3%
iQ Leeds	IQ	634	66	35.1%	33	17.6%	89	47.3%	188	29.7%
James Baillie Residences	Unite	563	544	94.4%	31	5.4%	1	0.2%	576	102.3%

Kirkstall Brewery	CRM	828	0	0.2%	16	94.6%	1	5.2%	17	2.0%
Leodis Residences	Collegiate AC	715	585	76.8%	34	4.5%	143	18.8%	762	106.6%
Live Oasis Arena Quarter Belgrave Street	YPP	NK	3	5.2%	29	50.0%	26	44.8%	58	NK
Accommodation	Provider	Capacity	New undergraduates		Returning undergraduates		Postgraduates		ALL	Occupancy
Live Oasis Arena Quarter Wade Lane	YPP	Not Known (NK)	5	9.6%	29	55.8%	18	34.6%	52	NK
Lofthouse Residence	YPP	NK	0	0.0%	5	62.5%	3	37.5%	8	NK
Lovell Park Hill	Primo	66	4	10.0%	21	52.5%	15	37.5%	40	60.6%
Marsden House	IQSA (Athena)	982	763	87.2%	53	6.1%	59	6.7%	875	89.1%
Mary Morris House	Campbell Property	247	31	27.2%	28	24.6%	55	48.2%	114	46.2%
Mill Street	Unipol	445	261	94.2%	15	5.4%	1	0.4%	277	62.2%
New York Street Buildings	Unipol	69	1	9.0%	14	93.3%	0	1.0%	15	21.7%
Oak House	Unipol	188	3	1.8%	46	26.9%	122	71.3%	171	91.0%
Oasis Residence	YPP	NK	8	9.6%	43	51.8%	32	38.6%	83	NK
Oxley Residences	Allied Students	NK	76	23.3%	26	8.0%	224	68.7%	326	NK
Pennine House	HELLO Student	128	19	20.0%	24	25.3%	52	54.7%	95	74.2%
Portland Crescent	VITA Student	308	33	12.2%	84	31.0%	154	56.8%	271	88.0%
Ribbon Residence	YPP	41	2	7.4%	15	55.6%	10	37.0%	27	65.9%
Royal Park Flats	Unipol	114	0	0.0%	0	0.0%	131	100.0%	131	114.9%
Royal Park Road	Almero Student	41	2	7.7%	12	46.2%	12	46.2%	26	63.4%
Sky Plaza	Unite	533	38	8.6%	104	23.5%	300	67.9%	442	82.9%
St Albans	VITA Student	376	46	13.6%	58	17.2%	234	69.2%	338	89.9%
St Ann's Lodge	Primo	52	6	22.2%	10	37.0%	11	40.7%	27	51.9%
St Mark's Court	HELLO Student	86	5	8.2%	17	27.9%	39	63.9%	61	70.9%

Sycamore House	Prime Student Living	117	20	15.9%	12	9.5%	94	74.6%	126	107.7%
Symons House	Homes for Students	351	29	9.6%	122	40.4%	151	50.0%	302	86.0%
The Edge, IconInc	IconInc	131	22	17.9%	29	23.6%	72	58.5%	123	93.9%
The Foundry	Abodus Student Living	239	71	46.1%	49	31.8%	34	22.1%	154	64.4%
The Glassworks	IconInc	211	39	24.2%	30	18.6%	92	57.1%	161	76.3%
The Leatherworks/Sugarwell Court	CRM Students	456	31	29.2%	17	16.0%	58	54.7%	106	23.2%
The Pavilion	Homes for Students	44	6	20.7%	8	27.6%	15	51.7%	29	65.9%

Accommodation	Provider	Capacity	New undergraduates		Returning undergraduates		Postgraduates		ALL	Occupancy
The Plaza	Unite	964	423	50.1%	193	22.8%	229	27.1%	845	87.7%
The Priory	Unite	77	2	3.6%	14	25.0%	40	71.4%	56	72.7%
The Refinery	Fresh Student	407	67	20.6%	84	25.8%	174	53.5%	325	79.9%
The Tannery	Unite	496	424	83.6%	38	7.5%	45	8.9%	507	102.2%
The Triangle	IconInc	177	10	7.6%	26	19.7%	96	72.7%	132	74.6%
Thornville Court	Almero Student	46	0	0.0%	28	87.5%	4	12.5%	32	69.6%
Trapezium	Torsion Students	91	4	20.0%	4	20.0%	12	60.0%	20	22.0%
Trinity Hall	Trinity Hall	116	12	12.8%	21	22.3%	61	64.9%	94	81.0%
Union	Union Student Living	87	9	12.2%	18	24.3%	47	63.5%	74	85.1%
Victoria Court Mews	Student Cribs	22	0	0.0%	6	85.7%	1	14.3%	7	31.8%
White Rose View	Unite	976	621	63.6%	185	19.0%	170	17.4%	976	100.0%
Woodhouse Flats	Mansion Student/UPP	175	48	48.5%	13	13.1%	38	38.4%	99	56.6%

NB: This table relies on the information supplied by students at UoL and LBU. It does not include students attending the other institutions in the city. As a result, occupancy figures may understate levels of occupancy. The figures may reflect in-year movements leading to occupancy figures above capacity. The table shows eight PBSA schemes with occupancy rates of more than 100 per cent.

Appendix 6o: Location of all students by level of study 2022/23

ALL students	Walking distance from university	Year 1 undergraduates		Returning undergraduates		Postgraduates		ALL	
		No.	%	No.	%	No.	%	No.	%
City centre	Under 15 mins	4,428	29.4%	2,593	10.5%	2,684	20.2%	9,705	18.3%
University/University/Woodhouse area	Under 15 mins	2,603	17.3%	1,688	6.9%	1,786	13.4%	6,077	11.5%
Hyde Park	Under 15 mins	271	1.8%	4,651	18.9%	561	4.2%	5,483	10.3%
Little Woodhouse	Under 15 mins	1,810	12.0%	1,134	4.6%	1,753	13.2%	4,697	8.9%
Central Headingley	Over 30 minutes	846	5.6%	2,545	10.3%	376	2.8%	3,767	7.1%
South Headingley	15-30 minutes	117	0.8%	2,326	9.4%	185	1.4%	2,628	5.0%
Woodhouse area	Under 15 mins	223	1.5%	1,400	5.7%	460	3.5%	2,083	3.9%
Headingley Hill	Under 15 mins	1,209	8.0%	417	1.7%	98	0.7%	1,724	3.3%
Far Headingley, Beckett Park	Over 30 minutes	490	3.2%	502	2.0%	393	3.0%	1,385	2.6%
Burley	15-30 minutes	94	0.6%	841	3.4%	353	2.7%	1,288	2.4%
Harolds	Under 15 mins	76	0.5%	648	2.6%	191	1.4%	915	1.7%
Burley Lodge	Under 15 mins	47	0.3%	381	1.5%	122	0.9%	550	1.0%
Cardigan Triangle	15-30 minutes	22	0.1%	305	1.2%	38	0.3%	365	0.7%
Kirkstall	Over 30 minutes	21	0.1%	80	0.3%	182	1.4%	283	0.5%
Meanwood/Headingley	Over 30 minutes	17	0.1%	88	0.4%	55	0.4%	160	0.3%
Other areas – inner Leeds	15-30 minutes	594	3.9%	951	3.9%	1,003	7.5%	2,548	4.8%
Other areas – outer Leeds	Over 30 minutes	336	2.2%	621	2.5%	343	2.6%	1,300	2.5%
Outside Leeds		1,878	12.5%	3,459	14.0%	2,712	20.4%	8,049	15.2%
All		3,085	20.5%	7,374	29.9%	4,999	37.6%	15,458	29.2%

Appendix 6p: Location of all students by level of study 2018/19

Location	Walking distance from university	Year 1 undergraduates		Returning undergraduates		Postgraduates		ALL	
		No.	%	No.	%	No.	%	No.	%
University area	Under 15 minutes	3,087	46.32%	1,728	25.93%	1,849	27.75%	6,664	13.4%
City centre	Under 15 minutes	3,374	54.27%	1,428	22.97%	1,415	22.76%	6,217	12.5%
Hyde Park	Under 15 minutes	278	4.84%	4,995	86.93%	473	8.23%	5,746	11.6%
Little Woodhouse	Under 15 minutes	1,865	42.56%	951	21.70%	1,566	35.74%	4,382	8.8%
Central Headingley	Over 30 minutes	1,195	29.99%	2,383	59.80%	407	10.21%	3,985	8.0%
Woodhouse area	Under 15 minutes	815	27.98%	1,567	53.79%	531	18.23%	2,913	5.9%
South Headingley	15-30 minutes	131	4.82%	2,442	89.88%	144	5.30%	2,717	5.5%
Headingley Hill	Under 15 minutes	1,274	68.86%	488	26.38%	88	4.76%	1,850	3.7%
Burley	15-30 minutes	133	9.97%	804	60.27%	397	29.76%	1,334	2.7%
Far Headingley/ Beckett Park	Under 15 minutes	831	57.47%	488	33.75%	127	8.78%	1,446	2.9%
Kirkstall	15-30 minutes	739	78.12%	110	11.63%	97	10.25%	946	1.9%
Harolds	Under 15 minutes	76	8.23%	679	73.48%	169	18.29%	924	1.9%
Burley Lodge	Over 30 minutes	33	6.12%	414	76.81%	92	17.07%	539	1.1%
Cardigan Triangle	Under 15 minutes	30	6.41%	359	76.71%	79	16.88%	468	0.9%
Meanwood/Headingley	Over 30 minutes	31	14.55%	113	53.05%	69	32.39%	213	0.4%
Other areas – inner Leeds	Over 30 minutes	665	37.03%	725	40.37%	406	22.61%	1,796	3.6%
Other areas – outer Leeds	Over 30 minutes	347	28.28%	568	46.29%	312	25.43%	1,227	2.5%
Outside Leeds		2,121	33.93%	2,648	42.35%	1,483	23.72%	6,252	12.6%
All		17,026	34.31%	22,890	46.13%	9,704	19.56%	49,620	100.0%

Appendix 6q: Location of University of Leeds students by level of study 2022/23

University of Leeds students	Walking distance from university	Year undergraduates		Returning undergraduates		Postgraduates		ALL	
		No.	%	No.	%	No.	%	No.	%
City centre	Under 15 minutes	2,883	30.8%	2,111	13.1%	2,411	26.9%	7,405	21.5%
University/University/Woodhouse area	Under 15 minutes	2,315	24.7%	1,458	9.0%	1,689	18.9%	5,462	15.8%
Hyde Park	Under 15 minutes	152	1.6%	3,992	24.7%	383	4.3%	4,527	13.1%
Little Woodhouse	Under 15 minutes	820	8.7%	911	5.6%	1,613	18.0%	3,344	9.7%
South Headingley	15-30 minutes	49	0.5%	1,863	11.5%	119	1.3%	2,031	5.9%
Central Headingley	Over 30 minutes	671	7.2%	887	5.5%	165	1.8%	1,723	5.0%
Headingley Hill	Under 15 minutes	1,202	12.8%	360	2.2%	74	0.8%	1,636	4.7%
Woodhouse area	Under 15 minutes	95	1.0%	980	6.1%	354	4.0%	1,429	4.1%
Harolds	Under 15 minutes	55	0.6%	532	3.3%	141	1.6%	728	2.1%
Burley	15-30 minutes	28	0.3%	442	2.7%	228	2.5%	698	2.0%
Burley Lodge	Under 15 minutes	14	0.1%	252	1.6%	36	0.4%	302	0.9%
Far Headingley, Beckett Park	Over 30 minutes	32	0.3%	140	0.9%	127	1.4%	299	0.9%
Cardigan Triangle	15-30 minutes	9	0.1%	194	1.2%	27	0.3%	230	0.7%
Kirkstall	Over 30 minutes	8	0.1%	24	0.1%	43	0.5%	75	0.2%
Meanwood/ Headingley	Over 30 minutes	4	0.0%	30	0.2%	33	0.4%	67	0.2%
Other areas - Inner Leeds	15-30 minutes	185	2.0%	278	1.7%	191	2.1%	654	1.9%
Other areas - Outer Leeds	Over 30 minutes	119	1.3%	263	1.6%	147	1.6%	529	1.5%
Outside Leeds		731	7.8%	1,449	9.0%	1,175	13.1%	3,355	9.7%
All		9,372	100.0%	16,166	100.0%	8,956	100.0%	34,494	100.0%

Appendix 6r: Location of University of Leeds students by level of study 2018/19

Location	Walking distance from university	Year 1 undergraduates		Returning undergraduates		Postgraduates		ALL	
		No.	%	No.	%	No.	%	No.	%
University area	Under 15 minutes	2,629	26.02%	1,447	9.60%	1,810	21.96%	5,886	18%
Hyde Park	Under 15 minutes	194	1.92%	4,221	28.00%	432	5.24%	4,847	15%
City centre	Under 15 minutes	2,171	21.49%	1,033	6.85%	1,293	15.69%	4,497	13%
Little Woodhouse	Under 15 minutes	915	9.06%	730	4.84%	1,526	18.52%	3,171	9%
South Headingley	Under 15 minutes	85	0.84%	1,943	12.89%	117	1.42%	2,145	6%
Woodhouse/Little London	Under 15 minutes	437	4.33%	1,189	7.89%	480	5.82%	2,106	6%
Central Headingley	Over 30 minutes	853	8.44%	750	4.97%	272	3.30%	1,875	6%
Headingley Hill	Under 15 minutes	1,267	12.54%	397	2.63%	73	0.89%	1,737	5%
Burley	15-30 minutes	58	0.57%	400	2.65%	329	3.99%	787	2%
Harolds	Under 15 minutes	54	0.53%	539	3.57%	156	1.89%	749	2%
Far Headingley/Beckett Park	Over 30 minutes	422	4.18%	129	0.86%	89	1.08%	640	2%
Burley Lodge	Under 15 minutes	21	0.21%	325	2.16%	74	0.90%	420	1%
Cardigan Triangle	15-30 minutes	14	0.14%	225	1.49%	59	0.72%	298	1%
Kirkstall	Over 30 minutes	57	0.56%	33	0.22%	54	0.66%	144	0%
Meanwood/Headingley	Over 30 minutes	11	0.11%	28	0.19%	52	0.63%	91	0%
Other areas – inner Leeds	15-30 minutes	211	2.09%	287	1.90%	260	3.15%	758	2%
Other areas – outer Leeds	Over 30 minutes	139	1.38%	246	1.63%	201	2.44%	586	2%
Outside Leeds		563	5.57%	1,155	7.66%	964	11.70%	2,682	8%
All		10,102	100.00%	15,077	100.00%	8,241	100.00%	33,420	100%

Appendix 6s: Location of Leeds Beckett University students by level of study 2022/23

Leeds Beckett University students	Walking distance from university	Year 1 undergraduates		Returning undergraduates		Postgraduates		ALL	
City centre	Under 15 minutes	1,545	27.1%	482	5.7%	273	6.3%	2,300	12.4%
Central Headingley	Over 30 minutes	175	3.1%	1,658	19.6%	211	4.9%	2,044	11.0%
Little Woodhouse	Under 15 minutes	990	17.3%	223	2.6%	140	3.2%	1,353	7.3%
Far Headingley/Beckett Park	Over 30 minutes	458	8.0%	362	4.3%	266	6.1%	1,086	5.9%
Hyde Park	Under 15 minutes	119	2.1%	659	7.8%	178	4.1%	956	5.2%
Woodhouse area	Under 15 minutes	128	2.2%	420	5.0%	106	2.4%	654	3.5%
University/University/Woodhouse area	Under 15 minutes	288	5.0%	230	2.7%	97	2.2%	615	3.3%
South Headingley	15-30 minutes	68	1.2%	463	5.5%	66	1.5%	597	3.2%
Burley	15-30 minutes	66	1.2%	399	4.7%	125	2.9%	590	3.2%
Burley Lodge	Under 15 minutes	33	0.6%	129	1.5%	86	2.0%	248	1.3%
Kirkstall	Over 30 minutes	13	0.2%	56	0.7%	139	3.2%	208	1.1%
Harolds	Under 15 minutes	21	0.4%	116	1.4%	50	1.2%	187	1.0%
Cardigan Triangle	15-30 minutes	13	0.2%	111	1.3%	11	0.3%	135	0.7%
Meanwood/Headingley	Over 30 minutes	13	0.2%	58	0.7%	22	0.5%	93	0.5%
Headingley Hill	Under 15 minutes	7	0.1%	57	0.7%	24	0.6%	88	0.5%
Other areas – inner Leeds	15-30 minutes	409	7.2%	673	8.0%	812	18.7%	1,894	10.2%
Other areas – outer Leeds	Over 30 minutes	217	3.8%	358	4.2%	196	4.5%	771	4.2%
Outside Leeds		1,147	20.1%	2,010	23.7%	1,537	35.4%	4,694	25.4%
All		5,710	100.0%	8,464	100.0%	4,339	100.0%	18,513	100.0%

Appendix 6t: Location of Leeds Beckett University students by level of study 2018/19

Location	Walking distance from university	Year 1 undergraduates		Returning undergraduates		Postgraduates		ALL	
Central Headingley	Over 30 minutes	342	4.9%	1,633	20.9%	135	9.2%	2,110	13.0%
City centre	Under 15 minutes	1,203	17.4%	395	5.1%	122	8.3%	1,720	10.6%
Little Woodhouse	Under 15 minutes	950	13.7%	221	2.8%	40	2.7%	1,211	7.5%
Hyde Park	Under 15 minutes	84	1.2%	774	9.9%	41	2.8%	899	5.5%
Woodhouse area	Under 15 minutes	378	5.5%	378	4.8%	51	3.5%	807	5.0%
Far Headingley/Beckett Park	Over 30 minutes	409	5.9%	359	4.6%	38	2.6%	806	5.0%
Kirkstall	Over 30 minutes	682	9.8%	77	1.0%	43	2.9%	802	5.0%
University area	Under 15 minutes	458	6.6%	281	3.6%	39	2.7%	778	4.8%
South Headingley	15-30 minutes	46	0.7%	499	6.4%	27	1.8%	572	3.5%
Harolds	Under 15 minutes	22	0.3%	140	1.8%	13	0.9%	175	1.1%
Burley	15-30 minutes	75	1.1%	404	5.2%	68	4.6%	547	3.4%
Cardigan Triangle	15-30 minutes	16	0.2%	134	1.7%	20	1.4%	170	1.0%
Meanwood/Headingley	Over 30 minutes	20	0.3%	85	1.1%	17	1.2%	122	0.8%
Burley Lodge	Under 15 minutes	12	0.2%	89	1.1%	18	1.2%	119	0.7%
Headingley Hill	Under 15 minutes	7	0.1%	91	1.2%	15	1.0%	113	0.7%
Other areas – inner Leeds	15-30 minutes	454	6.6%	438	5.6%	146	10.0%	1,038	6.4%
Other areas – outer Leeds	Over 30 minutes	208	3.0%	322	4.1%	111	7.6%	641	4.0%
Outside Leeds		1,558	22.5%	1,493	19.1%	519	35.5%	3,570	22.0%
All		6,924	100%	7,813	100%	1,463	100%	16,200	100%

Appendix 6u: Changes in location of student residence 2011/12 to 2022/23

Location	Walking distance from university	2011/12		2018/19		2022/23		Change 2012-2022/2023		Change 2018/19-2022/23	
City centre	Under 15 minutes	4,791	10.0%	6,217	12.5%	9,713	18.3%	4,922	102.7%	3,496	56.2%
University area	Under 15 minutes	3,239	6.8%	5,365	10.8%	4,970	9.4%	1,731	53.4%	-395	-7.4%
Hyde Park	Under 15 minutes	5,179	10.8%	5,746	11.6%	5,483	10.3%	304	5.9%	-263	-4.6%
Little Woodhouse	Under 15 minutes	4,884	10.2%	4,382	8.8%	4,697	8.9%	-187	-3.8%	315	7.2%
Central Headingley	Over 30 minutes	3,602	7.5%	3,985	8.0%	3,767	7.1%	165	4.6%	-218	-5.5%
South Headingley	15-30 minutes	2,113	4.4%	2,717	5.5%	2,628	5.0%	515	24.4%	-89	-3.3%
Woodhouse, University/Woodhouse area	Under 15 minutes	4,184	8.7%	4,008	8.1%	3,190	6.0%	-994	-23.8%	-818	-20.4%
Headingley Hill	Under 15 minutes	2,086	4.4%	1,850	3.7%	1,724	3.3%	-362	-17.4%	-126	-6.8%
Far Headingley/Beckett Park	Over 30 minutes	2,475	5.2%	1,446	2.9%	1,385	2.6%	-1,090	-44.0%	-61	-4.2%
Burley	15-30 minutes	1,371	2.9%	1,334	2.7%	1,288	2.4%	-83	-6.1%	-46	-3.4%
Harolds	Under 15 minutes	522	1.1%	924	1.9%	915	1.7%	393	75.3%	-9	-1.0%
Burley Lodge	Under 15 minutes	405	0.8%	539	1.1%	550	1.0%	145	35.8%	11	2.0%
Cardigan Triangle	15-30 minutes	358	0.7%	468	0.9%	365	0.7%	7	2.0%	-103	-22.0%
Kirkstall	Over 30 minutes	1,397	2.9%	946	1.9%	283	0.5%	-1,114	-79.7%	-663	-70.1%
Meanwood/Headingley	Over 30 minutes	851	1.8%	213	0.4%	160	0.3%	-691	-81.2%	-53	-24.9%
Other areas	15-30 minutes	2,992	6.2%	3,023	6.1%	3,840	7.2%	848	28.3%	817	27.0%
Outside Leeds/Not known		7,493	15.6%	6,253	12.6%	8,049	15.2%	556	7.4%	1,796	28.7%
All		47,942	100.0%	49,416	99.6%	53,007	100.0%	5,065	10.6%	3,591	7.3%

Appendix 6v: Areas outside Inner North-West Leeds accommodating students 2018/19 and 2022/23

2022/23					2018/19	UoL	LBU	All
	UoL	LBU	All					
Hunslet, Holbeck and Beeston area	102	338	440		Burmantofts	0	23	23
Harehills and Burmantofts area	98	396	494		Gipton area	47	57	104
Armley	114	277	391		Halton Moor area	0	16	16
Seacroft area	44	138	182		Richmond Hill/Cross Green area	19	30	49
Bramley	55	113	168		Seacroft area	61	105	166
Belle Isle and Middleton	34	119	153		Chapel Allerton	59	25	84
Chapelton area	35	116	151		Chapelton area	45	53	98
Chapel Allerton, Roundhay and /Moortown	85	107	192		Harehills	119	131	250
Richmond Hill/Cross Green area	27	66	93		Little London	0	26	26
Gipton area	46	22	68		Meanwood	13	25	38
Oakwood	0	64	64		Oakwood	0	46	46
Meanwood	14	40	54		Roundhay/Moortown	69	81	150
Halton Moor area	0	53	53		Belle Isle	15	59	74
Little London	0	45	45		Hunslet/Holbeck/Beeston area	105	142	247
ALL	654	1,894	2,548		Armley	145	135	280
					Bramley	50	84	134
					ALL	747	1,038	1,785

Appendix 6w Change in numbers of students living in inner areas outside Inner North-West Leeds – 2018/19 to 2022/23

Inner areas	2018/19	2022/23	% Change	Change in no.
Hunslet/Holbeck/Beeston area	247	440	78.1%	193
Harehills	250	439	75.6%	189
Armley	280	391	39.6%	111
Belle Isle	74	153	106.8%	79
Chapelton area	98	151	54.1%	53
Richmond Hill/Cross Green area	49	93	89.8%	44
Halton Moor area	16	53	231.3%	37
Bramley	134	168	25.4%	34
Burmantofts	23	55	139.1%	32
Little London	26	45	73.1%	19
Oakwood	46	64	39.1%	18
Meanwood	38	54	42.1%	16
Seacroft area	166	182	9.6%	16
Chapel Allerton	84	89	6.0%	5
Gipton area	104	68	-34.6%	-36
Roundhay/Moortown	150	103	-31.3%	-47
ALL	1,785	2,548	42.7%	763

Appendix 6x: Students living in addresses outside Leeds within the UK 2022/23

	University of Leeds students		Leeds Beckett University students		ALL STUDENTS	
West Yorkshire – Bradford	712	23.5%	1,390	30.0%	2,102	27.4%
West Yorkshire – Kirklees/Calderdale	411	13.6%	749	16.1%	1,160	15.1%
West Yorkshire – Wakefield	565	18.6%	538	11.6%	1,103	14.4%
South Yorkshire	296	9.8%	432	9.3%	728	9.5%
Hull/East Yorkshire	67	2.2%	89	1.9%	156	2.0%
York/Harrogate/North Yorkshire	141	4.7%	307	6.6%	448	5.8%
North West	441	14.5%	539	11.6%	980	12.8%
North East	52	1.7%	128	2.8%	180	2.3%
Midlands	109	3.6%	270	5.8%	379	4.9%
Eastern England	19	0.6%	2	0.0%	21	0.3%
London and South East	188	6.2%	177	3.8%	365	4.8%
Scotland	23	0.8%	9	0.2%	32	0.4%
Wales	5	0.2%	6	0.1%	11	0.1%
Northern Ireland	2	0.1%	5	0.1%	7	0.1%
ALL areas outside Leeds within the UK	3,031	100.0%	4,641	100.0%	7,672	100.0%
Outside UK/Insufficient information	324	9.7%	53	1.1%	377	4.7%

ENDNOTES

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- ¹ Martin Blakey, Unipol for the Higher Education Policy Institute: [Why there should be no surprises about the growing student housing shortage](#) (November 2022) and [The latest developments in student accommodation](#) (March 2023)
- ² *One of the key drivers of the forecast decline in output and employment for 2023 is the impact of inflation and higher interest rates, which are currently squeezing household incomes, likely to reduce consumer spending, and resulting in forecast declines in output. The origins of high inflation in the UK economy pre-date the Russia-Ukraine conflict, with UK prices rising quickly at the start of 2022 as supply chain bottlenecks and pent-up consumer demand resulted in inflationary pressure. The Russia-Ukraine conflict exacerbated these issues, resulting in the ensuing cost-of-living squeeze that has emerged within the economy, characterised by CPI reaching a 40-year high in October 2022 at 11.1%. (Ernst & Young: *Regional Economic Forecast Report*, February 2023, p14)*
- ³ On the scale of the small-landlord sector and its recent contraction, see Competition & Markets Authority: [Rented Housing Sector: Consumer Research Project Update Report](#), August 2023, p.15:
- ^{2.19} *The PRS in England is characterised by a large number of individual landlords, rather than corporations. The English Private Landlord Survey (EPLS)³⁸ suggests that in 2021, 94% of all landlords were private individuals. Further, the EPLS suggests that 43% of landlords owned one rental property (representing 20% of tenancies) and 39% owned between two and four rental properties (representing 31% of tenancies).*
- ^{2.20} *According to official data from HMRC, 39 2.74 million unincorporated landlords declared income from rented property in 2020-2021. Of these, 2.71 million (99%) were individuals who declared property income as part of their self-assessment tax return. HMRC also notes that the total income from UK property decreased by 11% between 2016/2017 and 2020/2021, and that this was 'driven by a decrease in both average property income and the number of individuals reporting property income in 2020 to 2021, which fell to 2.74 million in 2020/2021 from 2.79 million in 2019/2020.*
- ⁴ Propertymark: [A shrinking private sector?](#) June 2022, p.1
- ⁵ Public Accounts Committee: [Financial sustainability of the higher education sector in England](#), June 2022
- ⁶ The 2021/22 funding total for teaching was 78 per cent below the 2010/11 figure in real terms. Tuition fees have remained almost static for ten years. Analysis by the Russell Group shows that a proposed uplift in grant funding is unlikely to cover the shortfall resulting from freezing tuition fees to 2024/25 [INSERT REFERENCE]. It found that many undergraduate courses are run at a deficit, calculated at £1,900 on average for STEM subjects.
- ⁷ Public Accounts Committee, *ibid*, p.3
- ⁸ See, for example, Rachel Hewitt for the Higher Education Policy Institute, [Demand for higher education to 2035](#), October 2020
- ⁹ UCAS, in collaboration with Unite Students and Knight Frank, [Journey to a million](#), 2023
- ¹⁰ For detailed study, see: Elaine Drayton and Laura van der Erve for the Institute for Fiscal Studies, [Impact of student loan minimum eligibility requirements](#), April 2022
- Joe Lewis & Paul Bolton, [The Post-18 Education and Funding Review: Government conclusion](#), April 2022
- ¹² A high level of confidence can be attached to the Census numbers because they are consistent with the official full-time figures for Leeds-based higher education institutions, as submitted to the Higher Education Statistics Agency for that year – 65,215, which, although it excludes the small number of students at the Leeds campus of the cross-country University of Law, includes a significant number of full-time students registered at a Leeds university but studying at a location outside the city.
- ¹³ However, economic inactivity due to ill-health and early retirement increased during the pandemic and the timing of the 2021 Census may have captured this rise. See Esme Kirk-Wade and Rachael Harker for the House of Commons Library, [How is health affecting economic inactivity?](#) March 2023. It remains to be seen if this is a temporary phenomenon.
- ¹⁴ Leeds City Council, [The Leeds Local Plan: Core Strategy](#) (as amended by the Core Strategy Selective Review 2019), Policy H6, Part B

15 Leeds City Council, *Local Plan*, p.75
16 Leeds City Council, *Local Plan*, p.75
17 Available data earlier than 2014/15 is not comparable with the data set used here.
18 The academic year 2013/14 signalled a significant dip in PBSA bed space numbers following the decommissioning of Bodington Hall and the unanticipated need to close two buildings at Kirkstall Brewery. On the basis of data gathered for the 2012 iteration, there were 19,245 PBSA bed spaces in Leeds in 2011/12 – sufficient to accommodate the volume of student numbers recorded for that year elsewhere in this report (19,175 – see Figure 68).
19 Both Leeds Beckett University and the University of Leeds shared their accommodation strategies and stock profile for the research. These are analysed in this section.
20 Unipol/National Union of Students, [Accommodation Costs Survey](#), December 2021
21 It should be noted that at this time of year (June) there are fewer rental properties available because of the cyclical nature of the student letting cycle.
22 Anecdotal reports of some landlords inviting prospective tenants to bid beyond the advertised rent level were confirmed by the landlords participating in the discussion session held for the purposes of this research.
23 ONS forecast student loans outlays – <https://explore-education-statistics.service.gov.uk/data-catalogue/student-loan-forecasts-for-england/2022-23>
24 ONS, Census 2021, [Private rental affordability, England, Wales and Northern Ireland 2022](#)
25 See, for example, Jonathan Neves & Rose Stephenson for Advance HE and the Higher Education Policy Institute, [Student Academic Experience Survey 2023](#), p.7, p.58 and p.74
26 The data provided by the institutions is net of students studying in settings outside Leeds, dormant students, distance learners, students on exchange/work placement away from Leeds, students on short courses and students on leave of absence.
27 Without reference to the HESA schema, many students understandably attach a literal meaning to *own home* as signifying *wherever I live, irrespective of whether I own it or not*.
28 See Footnote 18.
29 Universities UK have provided helpful guidance on this: [Supporting good practice in student accommodation: considerations for senior university leaders](#), May 2023 (updated October 2023)