

Student Housing Trends 2016-2017 Academic Year

Boston's world-renowned colleges and universities provide our City and region with unparalleled cultural resources, a thriving economic engine, and a talented workforce at the forefront of global innovation. However, the nearly 150,000 students enrolled in Boston-based undergraduate and graduate degree programs, can place enormous strain on the City's residential housing market and contribute to higher rents and housing costs for Boston's workforce. In *Housing a Changing City: Boston 2030*, Mayor Walsh outlined three clear strategic goals for his administration regarding student housing:

1. Create 18,500 new student dormitory beds (16,000 for undergraduates and 2,500 for graduates) by 2030, freeing up at least 5,000 units of workforce housing currently occupied by students;
2. Reduce the number of undergraduates living off-campus in Boston by 50%¹;
3. Ensure all students reside in safe and suitable housing.

The annual student housing report provides the opportunity to review the City's progress in advancing our goals, as well as an analysis of the emerging trends in our off-campus student housing market. This report is based on data from the University Accountability Reports (UAR)² submitted by Boston-based institutions of higher education.

In this third Student Housing Trends report, improvements have led to more precise enrollment and off-campus data, allowing the City to better determine which students are having an impact on the private-housing market. The key findings are:

- Overall enrollment is 149,575. This is essentially flat, a net growth of only 145 students or 0.1% over the past year and a 1.7% increase since 2013.
- Our student housing strategy was built on an assumption that undergraduate enrollment would not grow more than 0.5% per year. The data shows that undergraduate enrollment is 92,295, a 0.5% decrease since 2013.
- Graduate student enrollment is 57,280, a 5.5% increase since 2013.
- Boston's gross off-campus undergraduate count decreased 4.7% (1,144 students) from 24,492 in 2013 to 23,348 in 2016.
- Nearly 3,600 undergraduate dorm beds were built from 2011-2016, including 1,030 in the past year alone.
- There are approximately 6,400 additional dorm beds under construction or planned which will result in the creation of 10,000 dorm beds.
- If undergraduate enrollment continues to remain flat or decrease, we estimate that the number of undergraduates living in private market housing in Greater Boston will be reduced by 5,000 after all current and planned dorm-bed activity is completed.

However, despite significant progress, challenges remain. More than 13,000 students currently occupy single family, 2-family, 3-family or condo units within the City of Boston - housing stock that has traditionally served Boston's families. Every unit inhabited by students shrinks the pool of housing available for Boston's workforce and increases the pressure on Boston's supply of unsubsidized affordable middle-income housing.

¹ In *Housing a Changing City: Boston 2030*, the gross off-campus count was reported as 20,600. This number has been revised to 24,492, after some data corrections and the addition of six colleges or universities to the original 2013 dataset.

² As required by Boston's University Accountability Ordinance, all Boston-based universities and colleges must submit an annual report providing detailed data on students enrolled in their school, including where they are living (on-campus or off-campus). The overall quality of the reporting has improved with each of the past three years reports: some schools were able to provide significantly better or more complete data this year than in the past. Nonetheless, there are still gaps in the data, namely comparability between off-campus sub-groups (off-campus at-home vs. off-campus not-at-home). We will, therefore, be focusing most of our analysis on characteristics of student housing in 2016 and less on changes over time. For further information, refer to the Appendix.

Enrollment Trends

The baseline data for this student housing report was established in *Housing a Changing City: Boston 2030*, using data from the Fall semester 2013. The tracking of enrollment data is important in order to ensure that the city's dorm-bed goals will reduce the need for on-campus housing. Increases in enrollment mean there are more students that will potentially enter the city's private-housing market and therefore, increase the number of dorm beds needed.

Since 2013, overall enrollment has been trending slightly upward at Boston's institutions of higher education, peaking in 2016 at 149,575 students. **Table 1** (page 3) provides a breakout of the total enrollment figures for each school. In the aggregate, total enrollment increased by slightly over 2,500 students, or 1.7%, since 2013. This is an annual rate of 0.57%, about 40% lower than the annual rate of growth from 1995-2010 of 1.4%.⁴

The data shows that enrollment trends vary greatly from school to school. Most of the net growth in aggregate enrollment from 2013-2016 can be attributed to increased enrollment at one school - Northeastern University (+3,062 or 10.3%)⁵. No other schools had enrollment increases over 600 students during the period: UMass Boston increased by 586 (4.6%) and Wentworth increased by 462 (11.7%). The largest decrease occurred at Suffolk with a drop of 1,059 (-12.6%) students, followed by Bay State College with a decrease of 445 students (-40.5%).

Enrollment peaked in 2016 at 149,575 students. From 2015-2016, enrollment increased by just 145 students (0.1%). As in the three-year trend, Northeastern led in increases from 2015-2016, with a growth of 836 (2.6%) students, while Suffolk saw the largest decrease at 422 (-5.4%) students. Overall, enrollment continues to stabilize, suggesting that the new dorm-beds built will reduce the need for on-campus housing at a faster rate.

In order to better understand the impact of enrollment changes on the housing market, **Table 2** (page 4) provides a further breakout of total enrollment at each school by class level (undergraduate and graduate). Growth in undergraduate enrollment is generally a greater concern than growth in graduate students for several reasons: 1) the greater number of undergraduates residing in the private-housing market, 2) their greater likelihood of residing in unsafe and unsuitable housing and 3) quality of life issues associated with the concentration of undergraduates in certain neighborhoods.

Closer analysis reveals that the growth in total enrollment from 2013-2016 stems exclusively from graduate enrollment growth, which grew by 2,966 (5.5%), while undergraduate enrollment actually fell by 441 (-0.48%). Northeastern accounted for the largest share of the increases, adding 2,801 (25.9%) graduate students. The greatest decreases among undergraduate students occurred at Massachusetts College of Pharmacy (MCPHS), Bay State College and Suffolk University which saw decreases of 794 (-22.7%), 445 (-40.5%), and 369 (-7%), respectively. In the case of MCPHS, total enrollment dropped by just 2 students from 2013-2016 as the institution increased their graduate student population by nearly the same number as the decrease in undergraduate students.

³ Enrollment figures presented in this report excluded students enrolled in distance learning (online programs) and satellite campuses outside of Boston's borders. In general, students in evening/part-time/professional programs are also excluded.

⁴ Refer to Boston 2030, total percentage growth from 1995-2010 was 21% (21%/15 years = 1.4% annual rate).

⁵ Northeastern's (NEU) growth almost exclusively consists of graduate students (see table 2), part of which are in NEU's College of Professional Studies (CPS) and Law Program. CPS offers a limited number of both undergraduate and graduate programs that would mostly be termed "professional" (i.e. project management) to primarily a working population (evening/online/weekend classes). While students in evening/professional programs are normally excluded from the enrollment figures in this report, they were included in NEU's enrollment figures given the size of the CPS program and because the data revealed that a large portion of these students resided off-campus in Boston's private housing market. For Fall 2016, graduate students represented the majority of enrollment in CPS. The Law program at NEU is small (500 students).



Table 1: Total Enrollment Change by School, 2013-2016⁶

Enrollment Fall 2013-2015	Total Enrollment Counts				Difference 2013-2016		Difference 2015-2016	
	Institution Name	Total 2013	Total 2014	Total 2015	Total 2016	Count	%	Count
Bay State College	1,194	1,090	903	653	-445	-40.5%	-250	-27.7%
Benjamin Franklin Institute	463	485	460	492	29	6.3%	32	7%
Berklee College of Music	4,519	4,710	4,474	4,509	-10	-.2%	35	.8%
Boston Architectural College	725	757	695	675	-50	-6.9%	-20	-2.9%
Boston Baptist College	96	97	92	77	-19	-19.8%	-15	-16.3%
Boston College	13,525	13,575	13,694	13,851	326	2.4%	157	1.1%
Boston Conservatory	774	730	801	797	23	3.0%	-4	-0.5%
Boston University	27,508	26,925	27,577	27,890	382	1.4%	313	1.1%
Emerson College	4,523	4,535	4,475	4,450	-73	-1.6%	-25	-0.6%
Emmanuel College	2,320	2,199	2,092	2,104	-216	-9.3%	12	0.6%
Fisher College	978	921	1,005	1,005	27	2.8%	0	0.0%
Harvard University	3,830	3,966	4,019	4,072	242	6.3%	53	1.3%
MA College of Art & Design	1,910	1,710	1,760	1,785	-125	-6.5%	25	1.4%
MA College of Pharmacy & Health Sciences	4,469	4,650	4,622	4,467	-2	0.0%	-155	-3.4%
MA Institute of Technology	11,301	11,319	11,359	11,395	94	0.8%	36	0.3%
MGH Inst. of Health Professions	1,302	1,426	1,418	1,561	259	19.9%	143	10.1%
NE College of Optometry	502	519	511	533	31	6.2%	22	4.3%
New England Conservatory	812	641	789	819	7	0.9%	30	3.8%
New England Law Boston	964	869	681	622	-342	-35.5%	-59	-8.7%
Northeastern University	29,755	30,763	31,981	32,817	3,062	10.3%	836	2.6%
School of Museum of Fine Arts	651	510	499	328	-323	-49.6%	-171	-34.3%
SHOWA Institute	263	258	270	229	-34	-12.9%	-41	-15.2%
Simmons College	4,655	3,996	4,316	4,367	-288	-6.2%	51	1.2%
St John Seminary	N/A	165	209	193	1	0.5%	-16	-7.7%
Suffolk University	8,437	8,155	7,800	7,378	-1,059	-12.6%	-422	-5.4%
Tufts Univ. (Health Sciences)	2,632	2,778	2,786	2,834	202	7.7%	48	1.7%
University of MA-Boston	12,804	13,176	13,540	13,390	586	4.6%	-150	-1.1%
Urban College of Boston	767	811	853	815	48	6.3%	-38	-4.5%
Wentworth Institute	3,952	4,485	4,576	4,414	462	11.7%	-162	-3.5%
Wheelock College	1,323	1,319	1,173	1,053	-270	-20.4%	-120	-10.2%
TOTAL ENROLLMENT	147,050	147,430	149,430	149,575	2,525	1.7%	145	0.1%

⁶ Total enrollment figures include both full-time and part-time students.

Table 2: Enrollment Change by School and Class Level, 2013-2016⁷

Enrollment Fall 2013-2016	Undergraduate Enrollment			Graduate Enrollment		
	Institution Name	2013	2016	Change	2013	2016
Bay State College	1,098	653	-445	0	0	0
Benjamin Franklin Institute	463	492	29	0	0	0
Berklee College of Music	4,402	4,460	58	117	49	-68
Boston Architectural College	407	308	-99	318	367	49
Boston Baptist College	96	77	-19	0	0	0
Boston College	9,049	9,309	260	4,476	4,542	66
Boston Conservatory	545	574	29	229	223	-6
Boston University	16,871	16,803	-68	10,637	11,087	450
Emerson College	3,720	3,804	84	803	646	-157
Emmanuel College	2,059	1,934	-125	261	170	-91
Fisher College	978	971	-7	0	34	34
Harvard University ⁸	0	0	0	3,830	4,072	242
MA College of Art & Design	1,776	1,653	-123	134	132	-2
MA College of Pharmacy & Health Sciences	3,499	2,705	-794	970	1,762	792
MA Institute of Technology	4,528	4,543	15	6,772	6,852	79
MGH Inst. of Health Professions	307	532	225	995	1,029	-34
NE College of Optometry	0	0	0	502	533	31
New England Conservatory	430	413	-17	382	406	24
New England Law Boston	0	0	0	964	622	-342
Northeastern University	18,937	19,198	261	10,818	13,619	2,801
School of Museum of Fine Arts	484	245	-239	167	83	-84
SHOWA Institute	263	229	-34	0	0	0
Simmons College	1,732	1,799	67	2,923	2,568	-355
St John Seminary	43	40	-3	149	153	4
Suffolk University	5,593	5,224	-369	2,844	2,154	-690
Tufts Univ. (Health Sciences)	0	0	0	2,632	2,834	202
University of MA-Boston	10,122	10,567	445	2,682	2,823	141
Urban College of Boston	767	811	48	0	0	0
Wentworth Institute	3,708	4,221	513	244	193	-51
Wheelock College	859	726	-133	464	327	-137
TOTAL ENROLLMENT	92,736	92,295	-441	54,314	57,280	2,966

⁷ Ibid.

⁸ Harvard's enrollment data are for Boston-based schools only (Business, Medical and Public Health).

Table 3 provides a breakout of enrollment by full-time or part-time status. There are just over 6,600 part-time undergraduate students and just over 12,000 part-time graduate students. Only 7% of undergraduates are part-time students compared to 21% of graduate students. Part-time students tend to be working professionals, nontraditional or adult learners and generally do not have the same impact on Boston's neighborhoods and the housing market as full-time students.

Table 3: Enrollment by Degree Level and Full-Time and Part-Time Status, 2016

Fall 2016 Institution Name	Undergraduate Enrollment			Graduate Enrollment		
	Full Time	Part Time	Total	Full Time	Part Time	Total
Bay State College	426	227	653	0	0	0
Benjamin Franklin Institute	425	67	492	0	0	0
Berklee College of Music	4,038	422	4,460	20	29	49
Boston Architectural College	302	6	308	341	26	367
Boston Baptist College	52	25	77	0	0	0
Boston College	9,309	0	9,309	3,485	1,057	4,542
Boston Conservatory	568	6	574	204	19	223
Boston University	16,696	107	16,803	9,250	1,837	11,087
Emerson College	3,753	51	3,804	581	65	646
Emmanuel College	1,882	52	1,934	0	170	170
Fisher College	831	140	971	16	18	34
Harvard University ⁹	0	0	0	3,779	293	4,072
MA College of Art & Design	1,568	85	1,653	83	49	132
MA College of Pharmacy & Health Sciences	2,538	167	2,705	1,711	51	1,762
MA Institute of Technology	4,495	48	4,543	6,707	145	6,852
MGH Inst. of Health Professions	188	344	532	742	287	1,029
NE College of Optometry	0	0	0	533	0	533
New England Conservatory	381	32	413	380	26	406
New England Law Boston	0	0	0	431	191	622
Northeastern University	18,653	545	19,198	10,428	3,191	13,619
School of Museum of Fine Arts	211	34	245	54	29	83
SHOWA Institute	229	0	229	0	0	0
Simmons College	1,595	204	1,799	981	1,587	2,568
St John Seminary	37	3	40	73	80	153
Suffolk University	4,945	279	5,224	1,471	683	2,154
Tufts Univ. (Health Sciences)	0	0	0	2,702	132	2,834
University of MA-Boston	7,956	2,611	10,567	1,063	1,760	2,823
Urban College of Boston	45	770	815	0	0	0
Wentworth Institute	3,855	366	4,221	84	109	193
Wheelock College	713	13	726	141	186	327
TOTAL ENROLLMENT	85,691	6,604	92,295	45,260	12,020	57,280

⁹ Ibid.

Student Housing: On-Campus vs. Off-Campus

Overall, of the 149,575 undergraduate and graduate students enrolled in Boston's institutions of higher education for Fall 2016, only 47,912 (32%) are housed on-campus. As shown in **Figure 1**, only 42,342 (46%) of undergraduates and only 5,570 (10%) of graduate students are housed on-campus. Most students (73,957 or 49.5%) live off-campus in the Greater Boston's private-housing market. Another 22,186 (14.8%) live at home. Of the students in the private-housing market, 47.9% are undergraduates and 52.1% are graduate students. Nearly 15,792 (44.6%) of the 35,418 undergraduates students living off-campus in Greater Boston's private-housing market live in other communities outside the City of Boston, while 19,626 (55.4%) reside in the City of Boston proper (see **Table 6**).

Figure 1: Students Living On-Campus vs. Off-Campus in Greater Boston by Degree Level, 2016¹⁰

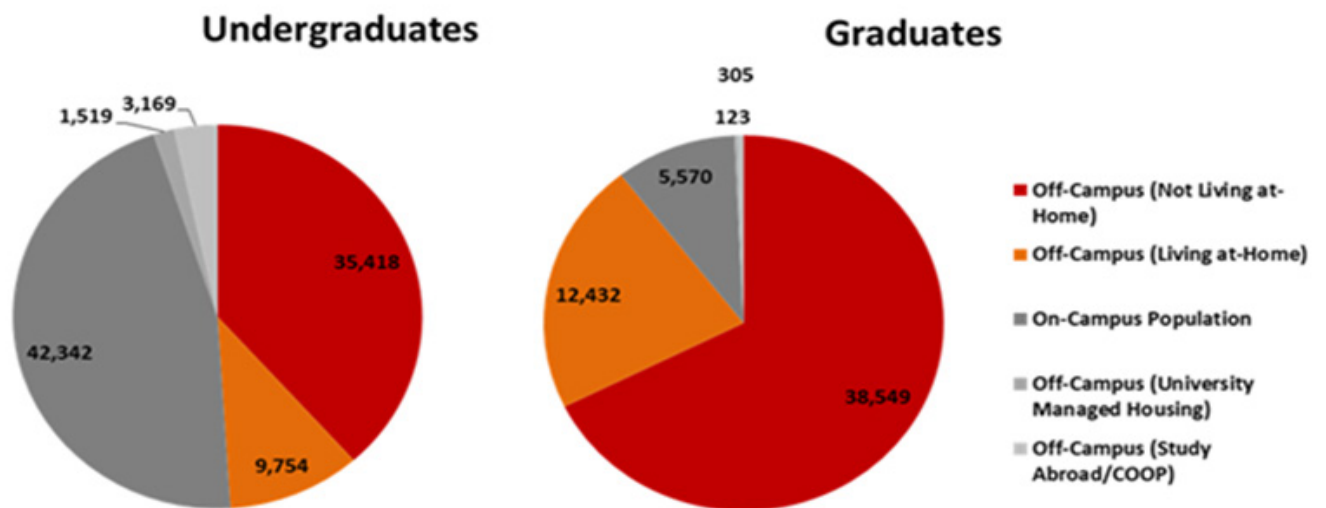


Table 4: Students Living On-Campus vs. Off-Campus in Greater Boston by Degree Level, 2016¹¹

Living Arrangement	Impact on Private Housing Market	Undergraduates	Graduates	Total	% of Grand Total
Off-Campus Not Living at Home	HIGH	35,418	38,549	73,967	49.5%
Off-Campus Commuter Living at Home	LOW	9,754	12,432	22,186	14.8%
On-Campus	NONE	42,342	5,570	47,912	32.0%
Off-Campus University Managed Housing		3,169	305	3,474	2.3%
Off-Campus Study Abroad/Co-op		1,519	123	1,642	1.1%
TOTAL		47,030	5,998	149,181	99.7%

¹⁰ The total sum of housing on-campus and off-campus for all students in Figure 1 is 149,181. This is 394 students short of the 2016 total enrollment of 148,575 (Table 1). This discrepancy is a result of reporting errors by a few universities. These figures include full-time and part-time students.

¹¹ Ibid.

The living arrangements groups in **Figure 1** and **Table 4** have different impacts on the private-housing market.¹² The off-campus not-at-home (red) category refers to students who entered the private- housing market primarily to study at a Boston-based institution. For undergraduates, this usually means that the student does not live with a parent or guardian or in a housing facility managed or owned by their respective institution. By definition, this category has a major impact on the private-housing market as these students are directly competing with working families for housing.

The off-campus at-home category (orange), on the other hand, refers to students who resided in their home prior to becoming a student. For undergraduates, this typically refers to students who live with their parents or guardians. By definition, this category has no impact on the private-housing market. However, given the possibility that some of the students in this category were miscategorized and should have been categorized as off-campus not-at-home, the impact of this category on the private-housing market is considered low.

Off-Campus study abroad/coop refers (light gray) to students enrolled in programs outside of Boston and has no impact on Boston's private-housing market. The other two groups, on-campus (dark grey) and off-campus university managed housing (mid-gray) are students in housing provided by the school and have no impact on the private housing market.

Table 5 (page 8) provides a breakout of the number of full-time undergraduate students housed on-and off-campus in Greater Boston (including those living off-campus in communities outside the City of Boston). Among the schools with large (5,000 or more) full-time undergraduate students, Boston College and Boston University house 84.4% and 73.3% of their students, while Northeastern University and Suffolk University house 55% and 39.3% respectively. The University of Massachusetts at Boston (UMB) currently does not provide university housing for any of its approximately 8,000 undergraduate students.

¹² Please refer to the appendix for further discussion of the definitions of off-campus subgroups.

Table 5: Percentage of Full-Time Undergraduates Housed by School (Greater Boston), 2016¹³

Institution	Enrolled Full-Time Undergrads	Students Provided Housing by School		Students Not in Need of Housing		Students in Need of Housing	
		In University Housing	In University Managed Housing	Off Campus Living at Home	Study Abroad	Off Campus Not at Home	% Students Provided Housing by School
Bay State College	426	86	0	233	0	107	44.6%
Benjamin Franklin Institute	425	27	0	184	0	215	11.2%
Berklee College of Music	4,038	1,243	0	115	41	2,639	32.0%
Boston Architectural College	302	13	0	30	0	259	4.8%
Boston Baptist College	52	47	0	1	0	4	92.2%
Boston College	9,309	7,531	0	154	234	1,390	84.4%
Boston Conservatory	568	189	0	0	0	385	33.3%
Boston University	16,696	11,373	0	685	492	4,146	73.3%
Emerson College	3,753	2,168	0	1,204	0	370	85.1%
Emmanuel College	1,882	1,113	187	432	22	128	91.0%
Fisher College	831	315	0	383	3	130	70.8%
Harvard University	0	0	0	0	0	0	N/A
MA College of Art & Design	1,568	649	0	0	10	914	41.7%
MA College of Pharmacy & Health Sciences*	2,538	705	1	118	0	1,714	29.2%
MA Institute of Technology	4,495	3,391	824	12	19	198	94.4%
MGH Institute of Health Professions*	188	0	0	0	0	188	0.0%
NE College of Optometry	0	0	0	0	0	0	N/A
NE Conservatory of Music	381	142	0	2	0	237	37.5%
New England Law Boston	0	0	0	0	0	0	N/A
Northeastern University	18,653	8,067	498	1,189	2,305	6,594	56.5%
School of Museum of Fine Arts	211	62	0	24	0	125	33.2%
SHOWA Institute	229	229	0	0	0	0	100.0%
Simmons College*	1,595	1,100	0	8	17	487	70.1%
St John Seminary	37	21	0	0	0	0	56.8%
Suffolk University	4,945	1,308	0	1,592	21	2,024	39.3%
Tufts University (Health Sciences)	0	0	0	0	0	0	N/A
University of MA-Boston*	7,956	0	*	0	0	7,956	0.0%
Urban College of Boston	45	0	0	45	0	0	N/A
Wentworth Institute	3,855	2,066	0	1,087	0	702	74.6%
Wheelock College	713	433	0	208	4	68	86.4%
Total	85,691	42,278	1,510	7,706	3,168	30,971	58.5%
PART-TIMERS (ALL SCHOOLS)	6,604	64	9	2,048	1	4,447	-
GRAND TOTAL	92,295	42,342	1,519	9,754	3,169	35,418	-

13 Table 5 calculates the percentage of students housed for the entire enrolled undergraduate (full-time) population, not just Boston. Part-time students are excluded from the calculation as these students generally do not seek housing provided by schools. Data provided by the following schools with undergraduate students did not distinguish between students residing off-campus (at-home) and off-campus (not-at-home) and are identified by an asterisk: Massachusetts College of Pharmacy and Health Sciences (MCPHS), MGH Institute of Health Professionals and University of Massachusetts Boston (UMB). These students are therefore shown as living in the private-housing market (off-campus not-at-home). Simmons did not distinguish between commuters and private-housing market students for students outside of Boston; these students are treated as living in the private-housing market as well. Institutions that did not distinguish between the off-campus sub-groups may have actually provided a greater percentage of housing than shown here.

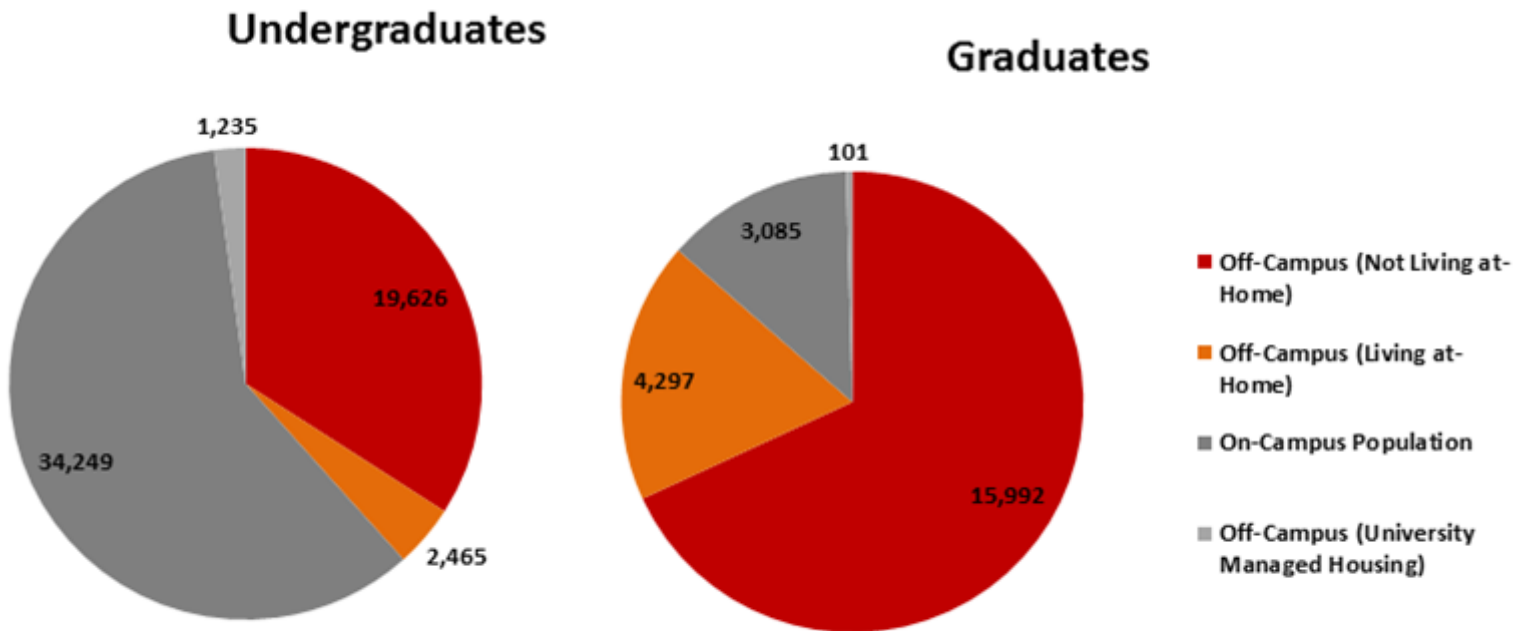


Students Living Off-Campus within the City of Boston

One of the goals of *Housing Boston 2030* is to reduce the number of undergraduate students living off-campus in Boston by 50% by adding 16,000 undergraduate dorm beds. We estimate that one-third of these 16,000 additional dorm beds will house students currently living outside Boston and two-thirds will house students currently living in Boston. The data shows that we are making some progress towards the dorm-bed goal. Boston's gross off-campus undergraduate count fell from 24,492 in 2013 to 23,348 in 2016 (-4.7%), a 1,144 student drop¹⁴. This is attributed to a combination of a drop in overall undergraduate enrollment and the 2,595 new dorm beds that came online during this period¹⁵.

Figure 2 compares the 2016 on-campus and off-campus student population residing *within the City of Boston* by degree level. Boston's off-campus population includes 23,348 undergraduate students, of which 2,465 students live at home, while another 1,235 live in university-affiliated/managed housing, leaving 19,626 students living in units in the private housing market.

Figure 2: Students Living On-Campus vs. Off-Campus by Degree Level in Boston, 2016¹⁶



¹⁴ Gross off-campus data has not been separated into the off-campus sub-groups (i.e. off-campus at-home and off-campus not at-home). For further information see the Appendix and footnote 1.
¹⁵ The full impact of the beds built from 2014 and 2016 are unknown given the 2013 off-campus data did not differentiate between students off-campus (living at-home) and off-campus (not-at-home). Some institutions with new dorm beds saw a rise in enrollment minimizing their impact.

¹⁶ The total sum of housing on-campus and off-campus for all students in Figure 2 is 86,665. There are 38 uncategorized students not shown in figure 2, bringing the grand total to 86,703 students that reside within Boston borders. These figures include full-time and part-time students.

Table 6: Students Living On-Campus vs. Off-Campus by Degree Level in Boston, 2016¹⁷

Living Arrangement	Impact on Private Housing Market	Undergraduates	Graduates	Total	% of Grand Total
Off-Campus Not Living at Home	HIGH	19,626	15,992	35,618	43.9%
Off-Campus Commuter Living at Home	LOW	2,465	4,297	6,762	8.3%
On-Campus	NONE	34,249	3,085	37,334	46.0%
Off-Campus University Managed Housing		1,235	101	1,336	1.6%
TOTAL		57,575	23,475	81,050	100.0%

In addition to the undergraduates living off-campus in private housing, there are nearly 16,000 graduate students also live living off-campus in private housing, bringing the total to 35,618 students exerting pressure on Boston's private-housing market.

Table 7 shows the number of undergraduates reported by each school to be living in Boston's private-housing market for 2015 and 2016. There is an estimated decrease of -446 undergraduates in the private-housing market. The decrease is led by Northeastern, which saw a decrease of 588 (-13%) students in the private-housing market. Boston University, on the other hand, saw a notable increase of 593 (25%) students in the private-housing market. Given that students tend to cluster in housing near their schools, some neighborhoods may, therefore, experience increased student pressure on the local housing market despite the generally positive citywide trend.

¹⁷ Ibid

Table 7: Undergraduate Students in the Boston Private Housing Market by School, 2016¹⁸

Institution	2015	2016	Change: 2015 to 2016	% Change: 2015 to 2016
Bay State College	73	85	12	16%
Benjamin Franklin Institute**	88	113	25	28%
Berklee College of Music	2,744	2,727	-17	-1%
Boston Architectural College	46	56	10	22%
Boston Baptist College	0	0	0	N/A
Boston College	1,124	1,066	-58	-5%
Boston Conservatory***	362	362	0	N/A
Boston University	2,333	2,926	593	25%
Emerson College**	248	240	-8	-3%
Emmanuel College	172	128	-44	-26%
Fisher College	100	87	-13	-13%
Harvard University	0	0	0	N/A
MA College of Art & Design*	257	294	37	14%
MA College of Pharmacy & Health Sciences	742	858	116	16%
MA Institute of Technology	86	73	-13	-15%
MGH Institute of Health Professions*	89	100	11	12%
NE College of Optometry	0	0	0	N/A
NE Conservatory of Music	218	216	-2	-1%
New England Law Boston	0	0	0	N/A
Northeastern University	4,473	3,885	-588	-13%
School of Museum of Fine Arts	168	66	-102	-61%
SHOWA Institute	0	0	0	N/A
Simmons College	89	116	27	30%
St John Seminary	8	0	-8	-100%
Suffolk University	1,575	1,543	-32	-2%
Tufts University (Health Sciences)	0	0	0	N/A
University of MA-Boston*	4,494	4,113	-381	-8%
Urban College of Boston	0	0	0	N/A
Wentworth Institute	548	543	-5	-1%
Wheelock College	35	29	-6	-17%
TOTAL	20,075	19,626	-446	-2%

18 This table includes both full-time and part-time students. Schools with an asterisk show gross off-campus population only (not off-campus not-at-home) given that these schools did not distinguish between off-campus sub-groups. ** The 2015 data from Benjamin Franklin Institute and Emerson College are estimates given that these two schools provided off-campus not-at-home data for 2016 only. *** Fall 2015 data from the Boston Conservatory is a plug-in given data incompatibility issues.

Table 8 shows the number of graduate students in the Boston private-housing market by school for 2015 and 2016. Among those schools with comparable data, there is an increase of 1,663 graduate students in private market housing. Northeastern is leading the growth in graduate students in private-market housing with an increase of 806 students, followed by an increase at Boston University of 783 students.

Table 8: Graduate Students in the Boston Private Housing Market by School, 2016¹⁹

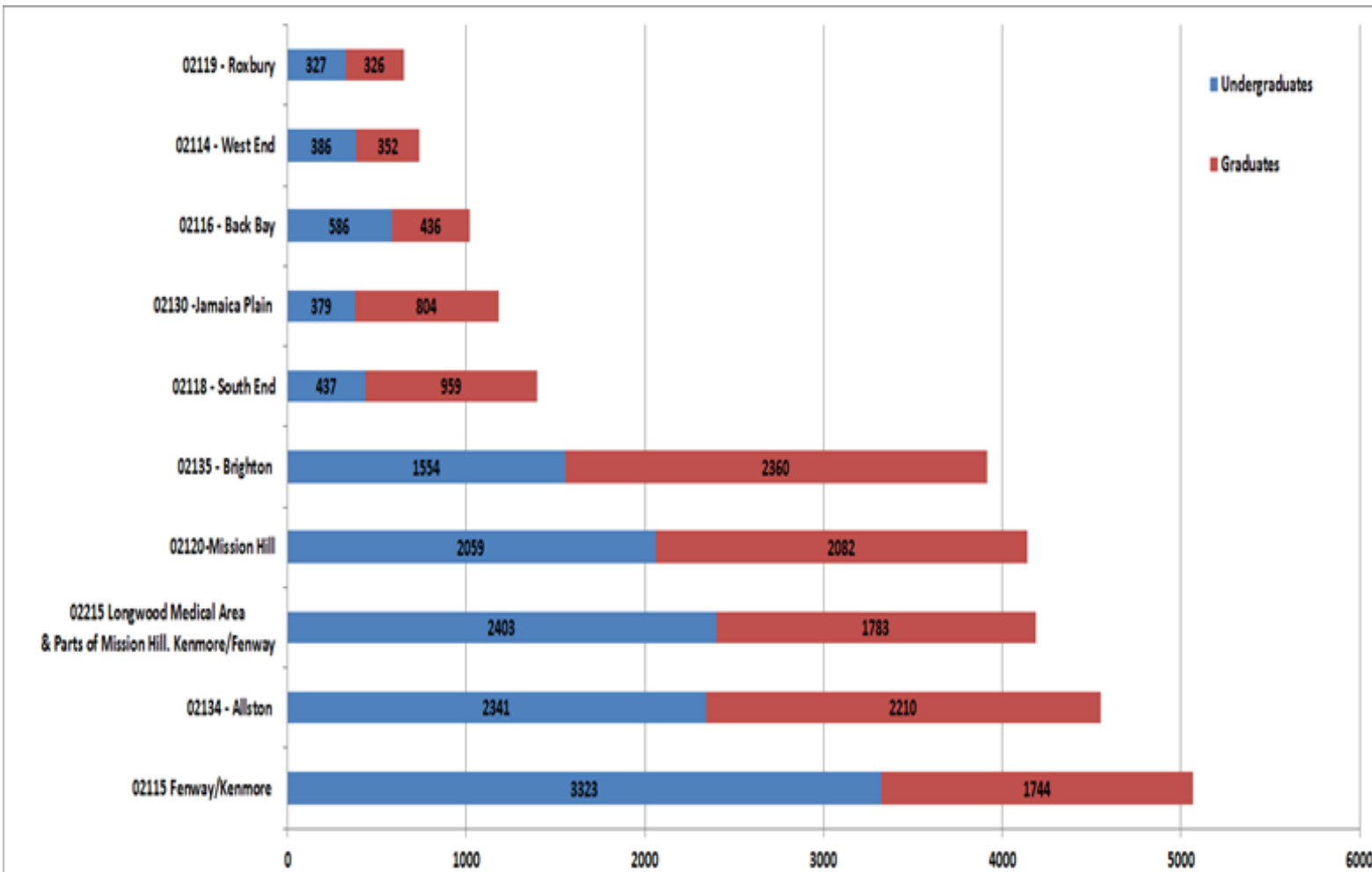
Institution	2015	2016	Change: 2015 to 2016	% Change: 2015 to 2016
Bay State College	0	0	0	N/A
Benjamin Franklin Institute**	0	0	0	N/A
Berklee College of Music	24	11	-13	-54%
Boston Architectural College	66	65	-1	-2%
Boston Baptist College	0	0	0	N/A
Boston College	876	882	6	-1%
Boston Conservatory***	151	151	0	N/A
Boston University	3,309	4,092	783	24%
Emerson College**	145	139	-6	-4%
Emmanuel College	50	0	-50	N/A
Fisher College	0	0	0	N/A
Harvard University**	433	482	49	11%
MA College of Art & Design*	37	45	8	22%
MA College of Pharmacy & Health Sciences	573	811	238	42%
MA Institute of Technology	552	469	-83	-15%
MGH Institute of Health Professions*	224	241	17	8%
NE College of Optometry	354	352	-2	-1%
NE Conservatory of Music	279	314	35	13%
New England Law Boston*	216	182	-34	-16%
Northeastern University	3,232	4,038	806	25%
School of Museum of Fine Arts	66	54	-12	-18%
SHOWA Institute	0	0	0	N/A
Simmons College*	472	466	-6	-1%
St John Seminary	6	0	-6	-100%
Suffolk University	566	468	-98	-17%
Tufts University (Health Sciences)	1,458	1,664	206	14%
University of MA-Boston*	1,171	1,011	-160	-14%
Urban College of Boston	0	0	0	N/A
Wentworth Institute	30	30	0	N/A
Wheelock College	39	25	-14	-36%
TOTAL	14,329	15,992	1,663	12%

¹⁹ This table includes both full-time and part-time students. Schools with an asterisk show gross off-campus population only (not off-campus not-at-home) given that these schools did not distinguish between off-campus sub-groups. ** The 2015 data from Benjamin Franklin Institute, Emerson College, and Harvard University are estimates given that these schools provided off-campus not-at-home data for 2016 only. *** Fall 2015 data from the Boston Conservatory is a plug-in given data incompatibility issues.

Off-Campus Students Housing by Neighborhood

Figure 3 shows the geographic distribution of undergraduate and graduate students by neighborhood, using zip codes as a proxy for neighborhoods.²⁰ Using zip codes for this analysis allow us to hone in on some of the smaller neighborhood areas of particular concern, such as Mission Hill and Uphams Corner/Columbia Point. At this time, we are not able to show trends in the distribution of students by neighborhood over time as a result of inconsistencies in data reporting from previous years. The most student-dominant zip codes are 02115 (Fenway/Kenmore), 02134 (Allston), 02115 (Longwood/Mission Hill, Kenmore/Fenway), 02120 (Mission Hill) and 02135 (Brighton).

Figure 3: Top Ten Locations of Off-Campus (Private Housing Market) Students by Zip Code in 2016



²⁰ Based on geocoded Off-Campus addresses obtained from Fall 2016 University Accountability Reports. While these are mostly students in the private housing market, totals may include addresses for students living at home, or in a university-managed facility. These figures include both full-time and part-time students.

Off-Campus Students Housing by Property Type

This section focuses on the property types in which students (undergraduates and graduates) reside. Nearly half of Boston's off-campus student population lives in properties of three units or fewer and condominiums. These students place particular pressure on Boston's workforce housing market. Boston's triple-deckers and other one-, two- and three-family properties were traditionally occupied by Boston's workforce, while most condominiums were owner-occupied and an entry to ownership. In some cases, students are living in condominium units purchased by parents as an investment to provide housing while their children are in school, which will later be sold when the student graduates. Other condominium units are rented at a profit to students by investor-owners.

Table 9: Students Living Off-Campus by Housing Type²¹

	Property Type	2016 Student Count	% of Addresses
Undergraduates	3 units or less (excluding condos)	4,157	27%
	Students in Condos	2,841	18%
	Students living in Apartments (4 units or more)	4,927	32%
	Students in Multi-Use Properties	2,815	18%
	Other Properties	848	5%
Graduates	3 units or less (excluding condos)	3,321	22%
	Students in Condos	2,873	19%
	Students living in Apartments (4 units or more)	4,617	31%
	Students in Multi-Use Properties	2,707	18%
	Other Properties	1,318	9%
All Students	3 units or less (excluding condos)	7,478	25%
	Students in Condos	5,714	19%
	Students living in Apartments (4 units or more)	9,544	31%
	Students in Multi-Use Properties	5,522	18%
	Other Properties	2,166	7%

²¹ Property categories are based on the Massachusetts Property Classification System Occupancy Codes. "3 Unit or Less" refers to residential properties: single-family (code 101), 2-Family (code 104) and 3-Family (code 105). The Condominium category (code 102/995) counts instances in which a condo exists, irrespective of whether the condo is located in a house or apartment building. For example, condos in a three-unit building are reported as condos, not as a 3-family. Apartments are buildings with 4+ units (codes 111-114) and are just residential. Multi-Use properties are buildings with multiple uses such as residential, commercial, condo, or office (codes 10-31). These figures include both full-time and part-time students.

New On-Campus Housing

To meet goal of creating 18,500 new dorm beds (16,000 for undergraduates and 2,500 for graduates) by 2030, the City needs to permit beds at an average pace of 646 beds per year from 2017-2030.

Fifty-four percent of the dorm-bed goal is preliminarily met by taking into account dorm beds built since 2011 (3,594), beds currently or soon to be under construction (2,536), beds under review (400) and future commitments (3,414) in the pipeline²¹. After considering the activity related demolitions and renovations, the net built and planned production is just under 9,000 (48% of the goal). Taking into account all current and future dorm-bed construction, the number of full-time undergraduate students needing housing ("dorm-bed gap") is projected to fall from nearly 31,000 to slightly fewer than 26,000 (see **Table 11**).²² Assuming that undergraduate enrollment continues to remain flat, the City's dorm-bed goals will have the intended impact of reducing undergraduates residing in the private housing market by 50%.

Table 10: Current Progress on Goal of Producing 18,500 New Dorm Beds²³

Goal for Total Beds	18,500	% of Total
Beds Built 2011-2016	3,594	19%
Currently In/Soon to be in Construction	2,536	14%
Under Review	400	2%
Pipeline/Future Commitments	3,414	18%
Gross Total Built and Planned Production	9,944	54%
Demolitions (2011-2016)	-928	-5%
Renovations (2011-2016)	0	0%
Planned Demolitions	-383	-2%
Planned Renovations (net)	271	1%
Net Total Built and Planned Production	8,904	48%
Beds Left to Create	9,596	52%

Table 11 shows the undergraduate housing need vs planned construction by school. Among the highlights include UMass Boston that recently broke ground on a 1,077 dorm-bed residence hall that is expected to be open by Fall 2018. This dorm is one of two projects that will add a total of 2,000 beds to UMass Boston, which previously did not have any on-campus housing before. In addition to the forthcoming UMass Boston beds, the pipeline includes 523 beds at Boston University and 691 beds at Emmanuel. Boston College added 1,030 new dorms in Mid-2016. While the net count of currently planned future construction and demolitions of beds at Boston College is -240, overall they have added close to 800 beds.

²¹ Institutional Master Plan (IMP) review is required by Article 80 for hospitals, colleges, and universities with more than 150,000 SF of gross square feet of property. "Pipeline" refers to projects that have received zoning approval but are not yet designed or approved under Large Project Review (Institutional Master Plan); their timeline is uncertain. Please note that planned beds are based on estimates and are subject to change.

²² Assumes undergraduate enrollment stays flat. Also, assumes that all the undergraduate students living in private-housing would move on dormitories or university-managed housing if given the choice.

²³ The 400 beds under review refer to the St. Gabriel graduate beds, a project put forth by private developers. These beds are not reflected in table 11. Planned renovations (net) refer to the difference in additions and losses of beds that are expected from future renovation activity.



Table 11: Undergraduate Housing Need vs. Planned Beds (Greater Boston)²⁴

Institution	Undergrads in Private Housing Market	Dorm Beds Currently or Soon to Be in Construction	In Large Project Review	New Dorm Beds in Pipeline	Current or Planned Demo/Renovations	Unmet Student Housing Needs
Bay State College	107					107
Benjamin Franklin Institute	215					215
Berklee College of Music*	2,639			450		2,189
Boston Architectural College	259					259
Boston Baptist College	4					4
Boston College*	1,390			550	-790	1,630
Boston Conservatory*	385					385
Boston University*	4,146			523	-23	3,646
Emerson College*	370	395			294	-319
Emmanuel College*	128			691	-220	-343
Fisher College	180					180
Harvard University	0					0
MA College of Art & Design	914					914
MA College of Pharmacy & Health Sciences*	1,714					1,714
MA Institute of Technology	189					189
MGH Institute of Health Professions	188					188
NE College of Optometry	0					0
NE Conservatory of Music*	287	252			-163	148
New England Law Boston	0					0
Northeastern University*	6,594	812		200		5,582
School of Museum of Fine Arts	125					125
SHOWA Institute	0					0
Simmons College*	487					487
St John Seminary	0					0
Suffolk University*	2,024					2,024
Tufts University (Health Sciences)	0					0
University of MA-Boston	7,956	1,077		1,000		5,879
Urban College of Boston	0					0
Wentworth Institute*	702					702
Wheelock College*	68					68
TOTAL	30,971	2,536	0	3,414	-902	25,923

²⁴ Schools with negative numbers in the unmet housing need column appear to show an intention to build more housing than their student body needs. In actually, some schools set-up cross-leasing arrangements with other schools or may wish to move students from off-campus managed housing (i.e. leased apartments) to on-campus dorms. The Boston College demolition of 790 beds has already occurred (in 2016), but kept on the table because the replacement 550 bed dorm has not occurred yet. Both are part of the same project.

Appendix 1: Definitions and Key Data Issues

As required by the University Accountability ordinance, all Boston-based universities and colleges must submit a report to the City each year providing data about the students enrolled in their school, including data on where they are living (on-campus or off-campus). The overall quality of the reporting has improved with each of the past reports since the 2013 baseline. Some of the schools were able to provide significantly better or more complete data this year than in the past. We commend them for their efforts. Unfortunately, this has created some complications in analyzing trends over time as a result of these comparability issues, particularly with respect to the type of off-campus living arrangement (off-campus at-home vs off-campus not-at-home), the type of property students live in (i.e. single-family vs condo) and migration shifts between Boston neighborhoods. What follows is a brief discussion of the data issues involved with the major focus areas of this report. The footnotes in the report contain specific information about data reconciliations if any. Please note this report is based only on Fall Semester data for the respective year reported.

Off-Campus Housing: In 2013, the off-campus numbers were not separated into the sub-categories of students [off-campus (at-home), off-campus (not-at-home) and living in university-managed housing], that were reported on in 2014-2016. Therefore, limiting the comparison of the off-campus subgroups to the baseline data. Furthermore, there are a small number of institutions that have not made these distinctions in any UAR report.

Off-Campus (Living at-home): This category was formerly called "commuters" in previous reports. This category refers to a living arrangement in which a student lives with their parents or legal guardians in any housing facility that is not owned or controlled by the educational institution. For part-timers, non-traditional students or graduate students, this category represents a place one lives prior to becoming a student and not obtained for the sole purposes of having a place to stay while being a student. Generally, living at home is when the "local/ mailing" address and the "home/permanent" address are the same in the institutional database.

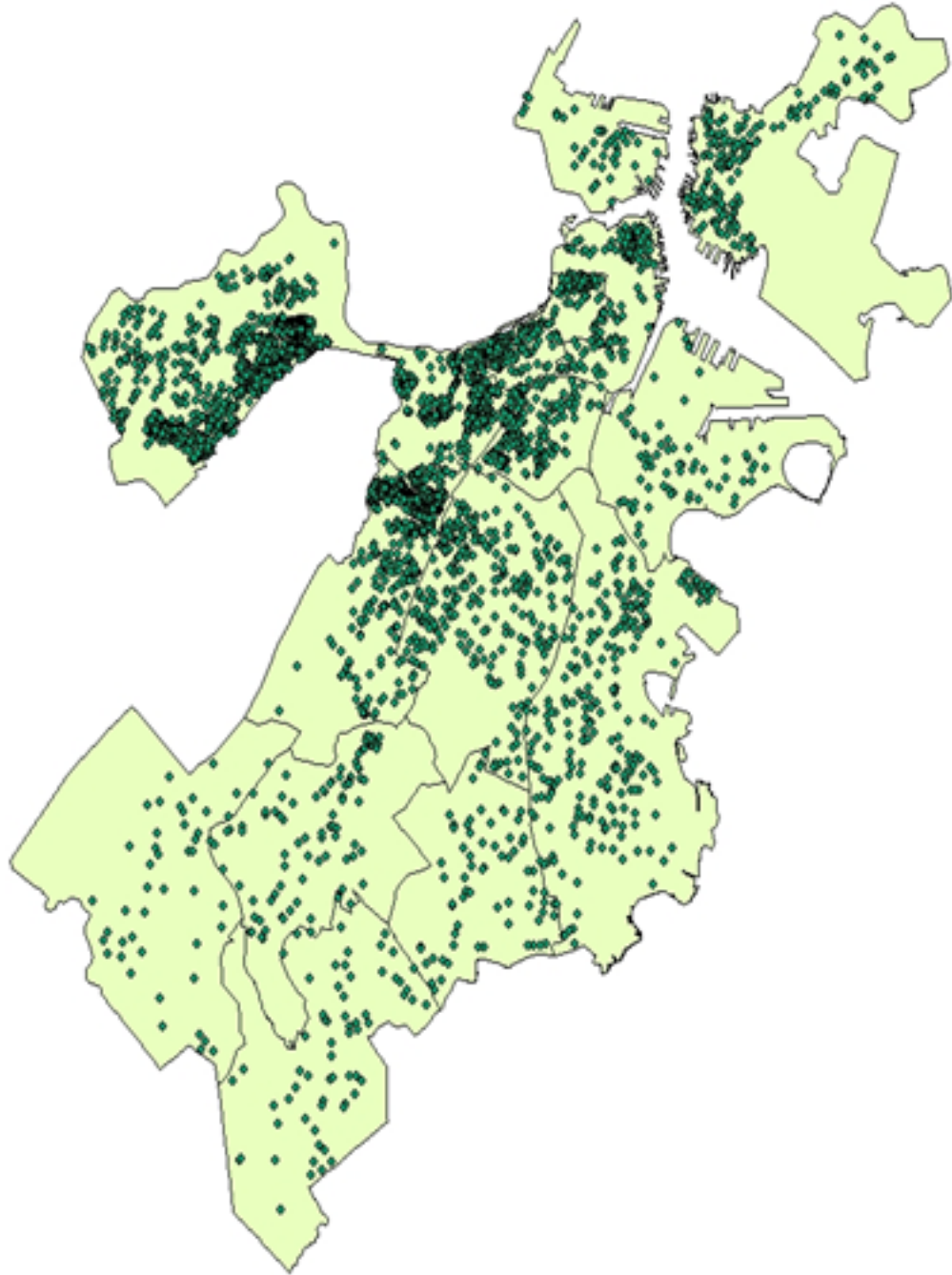
Off-Campus (Not Living at-home): This category was formerly called "private-housing" in previous reports. This category refers to when a student does not live with their parents or legal guardians or in any housing facility that is owned or controlled by the educational institution. This category aims to identify students who entered the private-market primarily to study at a Boston-based institution. Generally, living at home is when the "local/ mailing" address and the "home/permanent" address are not same in the institutional database. Please note that for graduate students, the address matching methodology is less effective in identifying students living in the private-housing market given that the concept of "home" can often be wherever the student resides at the time.



Address Data: While several institutions have improved their address collection methods in order to obtain more accurate address data, these addresses are reported by students and subject to errors. Some of the address data may reflect addresses of student living at-home as opposed to not-at-home. Given that the City is interested in the impacts of students on the private-housing market, inaccurate and incorrectly identified address data can impact the results of this analysis.

Geographic Distribution: For this report, we only reported on the 2016 distribution of off-campus students (private housing) by zip codes and the property types in which they lived. Because of data incompatibilities from 2013-2015, we refrained from presenting changes of students for a given neighborhood. As the data continues to stabilize and schools refine their reporting method, we hope to be able to do this in the future.

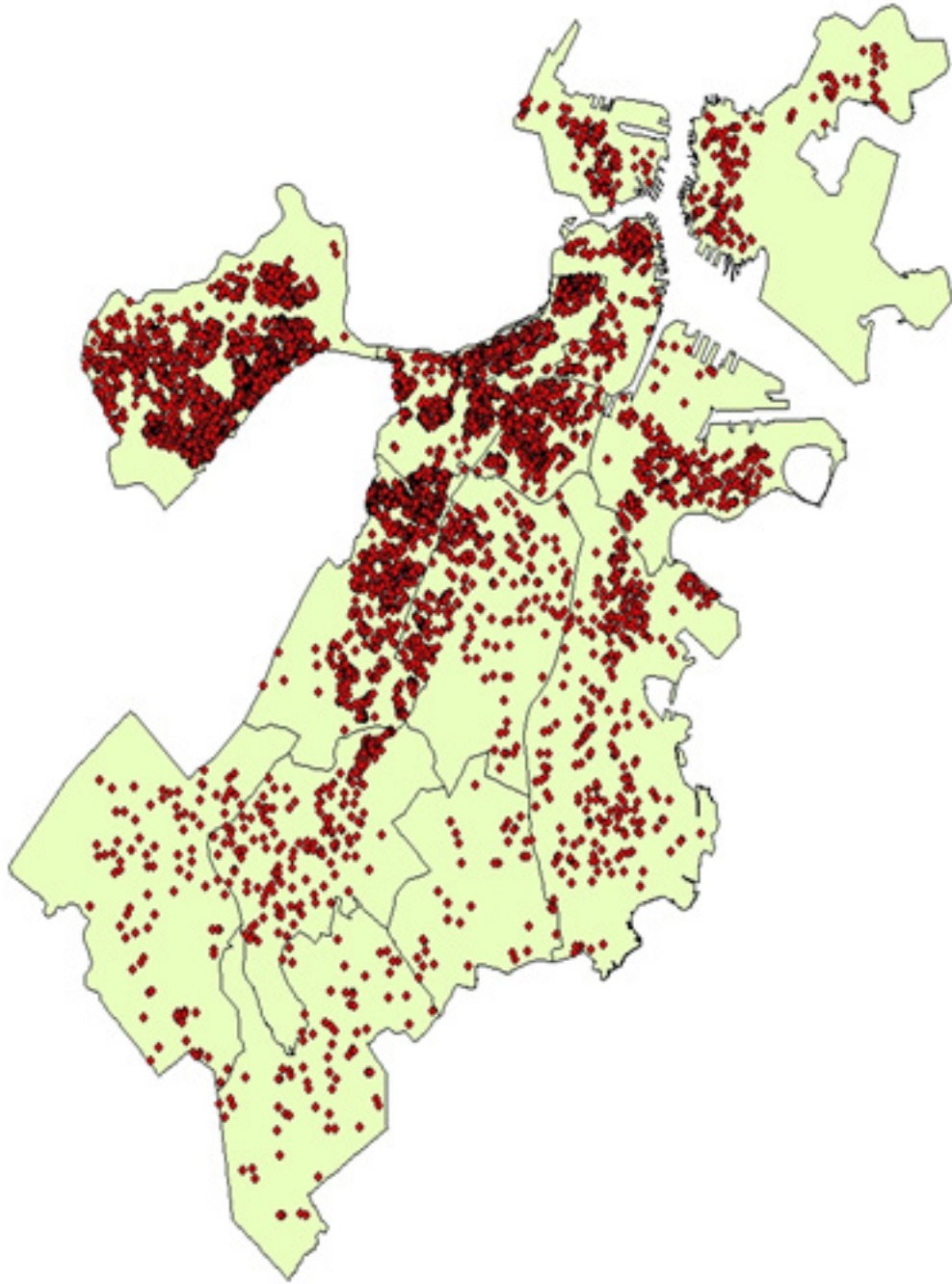
Map A1: Map of Off-Campus (Private Housing) Undergraduate Student Distribution²⁵



²⁵ Neighborhood outline are based on DND Planning districts and may not necessarily align with neighborhood boundaries from other sources.



Map A2: Map of Off-Campus (Private Housing) Graduate Student Distribution²⁶



26 Ibid.

Table A1: Off-Campus (Private-Housing) Students by Neighborhood (Department of Neighborhood Development Planning Districts)

Neighborhood	Undergraduates	Graduates	Total	% Of Total Students
Allston/Brighton	4,203	4,734	8,937	13.81%
Back Bay/Beacon Hill	1,052	937	1,989	3.46%
Central	1,113	568	1,681	3.66%
Charlestown	60	152	212	0.20%
Dorchester	359	370	729	1.18%
East Boston	350	175	525	1.15%
Fenway/Kenmore	4,650	3,260	7,910	15.28%
Hyde Park	71	75	146	0.23%
Jamaica Plain	2,210	2,298	4,508	7.26%
Mattapan	70	42	112	0.23%
Roslindale	125	220	345	0.41%
Roxbury	452	437	889	1.49%
South Boston	90	299	389	0.30%
South End	733	1,163	1,896	2.41%
West Roxbury	50	106	156	0.16%



Table A2: Off-Campus (Private-Housing) Students by Neighborhood
(Boston Planning and Development Agency Planning Districts)

Neighborhood	Undergraduates	Graduates	Total	% Of Total Students
Allston	2,397	2,643	5,040	16.57%
Back Bay	785	956	1,741	5.72%
Bay Village	30	41	71	0.23%
Beacon Hill	243	188	431	1.42%
Brighton	2,337	1,560	3,897	12.81%
Charlestown	152	60	212	0.70%
Chinatown	60	240	300	0.99%
Dorchester	193	551	744	2.45%
East Boston	175	350	525	1.73%
Fenway	2,492	4,385	6,877	22.60%
Hyde Park	74	67	141	0.46%
Jamaica Plain	745	359	1,104	3.63%
Leather District	5	7	12	0.04%
Longwood Medical Area	123	70	193	0.25%
Mattapan	26	51	77	0.04%
Mission Hill	2,294	2,083	4,377	14.39%
North End	171	262	433	1.42%
Roslindale	129	71	200	0.66%
Roxbury	729	857	1,586	5.21%
South Boston	275	76	351	1.15%
South Boston Waterfront	24	14	38	0.12%
South End	741	201	942	3.10%
West End	125	24	149	0.49%
West Roxbury	50	106	156	0.16%