

B STUDENT HOUSING

2019 to 2020

EXECUTIVE SUMMARY

Boston continues to be a top destination for college and university students worldwide. The region is home to several top-ranked universities and colleges, unique historical and cultural resources, and diverse entertainment, shopping, and food options. Boston offers a small-town feel for a major city; its neighborhoods are distinct and vibrant. The City is walkable and easy to navigate via public transit to the City's major attractions and between campuses, where there are thousands of other college-age students.

However, the more than 145,000 students enrolled in Boston-based undergraduate and graduate degree programs place enormous strain on the City's residential housing market and contribute to higher housing costs. In ***Housing a Changing City: Boston 2030***, the City outlined three clear strategic goals regarding student housing:

1. Create 18,500 new dormitory beds by the end of 2030.¹
2. Reduce the number of undergraduates living off-campus by 50 percent.²
3. Ensure that all students reside in safe and suitable housing.

The annual student housing report provides the opportunity to review the trends in housing Boston's students and their effect on our local housing market. Boston-based institutions of higher education provide student-related data via the University Accountability Reports (UAR), which is the basis of this report.³

- 1 The City's 18,500 dorm-bed goal includes 16,000 beds for undergraduates and 2,500 for graduates.
- 2 In ***Housing a Changing City: Boston 2030***, the gross off-campus count was 20,600. This number has been revised to 25,508 given data revisions and six additional schools added to the original 2013 dataset. This would mean the gross off-campus count would need to drop to 12,754 or lower to meet this goal.
- 3 As required by Boston's University Accountability ordinance, all Boston-based universities and colleges must submit a report to the City each year providing detailed data on the students enrolled in their school, including data on whether they are living on-campus or off-campus.



Among the key findings are:

- COVID-19 has had a dramatic impact on universities and their students.
 - Enrollment fell by over 5,000 students (-3.2 percent) during the pandemic; and
 - Remote learning and limited capacity on campuses have contributed to significant changes in where students live. There was a 41 percent reduction in the number of students living on-campus and an 18 percent decline in the number of students living off-campus (not-at-home). This contributed to an overall 26 percent decline in the number of students living in Boston.
- With 5,245 beds permitted since 2011, the City is currently at 61 percent of its current goal to meet the 18,500 bed by 2030 goal.

However, despite significant progress, challenges remain. More than 15,000 students currently occupy properties within Boston of three units or less, or condo units in the private housing market – housing stock that has traditionally served Boston’s families. Every housing 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.



ENROLLMENT TRENDS

Housing a Changing City: Boston 2030 established the baseline for Boston's student housing report using data from the 2013 Fall semester. The student housing data tracked by the City excludes community colleges, satellite campuses outside of Boston, and students enrolled exclusively or in primarily online programs (this does not include programs that switched to remote learning because of COVID-19). Before the coronavirus pandemic, overall enrollment at Boston's higher education institutions grew 3.7 percent from 2013-2019 (a 0.61 percent annual growth rate). This growth was led primarily by graduate students as undergraduate growth was flat during the period. However, the pandemic brought the number of college students in Boston-based institutions back to the 2013 levels as enrollment has fallen from 150,113 in 2019 to 145,260 (-3.2 percent) in 2020, 468 more students (0.3 percent more students) than in 2013.

Table 1 provides a breakout of the total enrollment figures for each school. The growth in students since 2013 has been led primarily by Northeastern, growing by more than 6,000 students through 2019, but losing just over 1,300 students since last year. Boston College and Boston University saw a more modest enrollment growth of 1,045 and 923 students respectively since 2013. Suffolk University saw the most significant decline during the period reducing enrollment by more than 1,800 students. Most schools saw a year-over-year decrease in enrollment from 2019-2020, with five schools losing at least 600 students.

Table 1: Total Enrollment Change by School, 2013-2020⁴

Institution Name	Total Enrollment Counts				Change 2013-2020		Change 2018-2020	
	2013 (Base Year)	2018	2019	2020	Count	Percentage	Count	Percentage
Bay State College	1,098	567	442	372	-726	-66.1%	-70	-34.4%
Benjamin Franklin Institute of Technology	463	554	529	370	-93	-20.1%	-159	-33.2%
Berklee College of Music	4,519	5,402	5,388	4,755	236	5.2%	-633	-12.0
Boston Architectural College	725	590	634	477	-248	-34.2	-157	-19.2%
Boston Baptist College	96	76	65	58	-38	-39.6%	-7	-23.7%
Boston College	13,525	14,107	14,171	14,570	1,045	7.7%	399	3.3%
Boston Conservatory (Merged with Berklee)	774	0	0	0	-774	-100.0%	0	N/A
Boston University	27,508	30,118	29,423	28,431	923	3.4%	-992	-5.6%
Emerson College	4,523	4,560	4,934	4,333	-190	-4.2%	-601	-5.0%
Emmanuel College	2,320	2,102	2,119	1,894	-426	-18.4%	-225	-9.9%
Fisher College	978	889	851	768	-210	-21.5%	-83	-13.6%
Harvard University (Boston Campuses)	3,830	3,970	4,101	3,447	-383	-10.0%	-654	-13.2%

⁴ Total enrollment includes both full-time and part-time students.



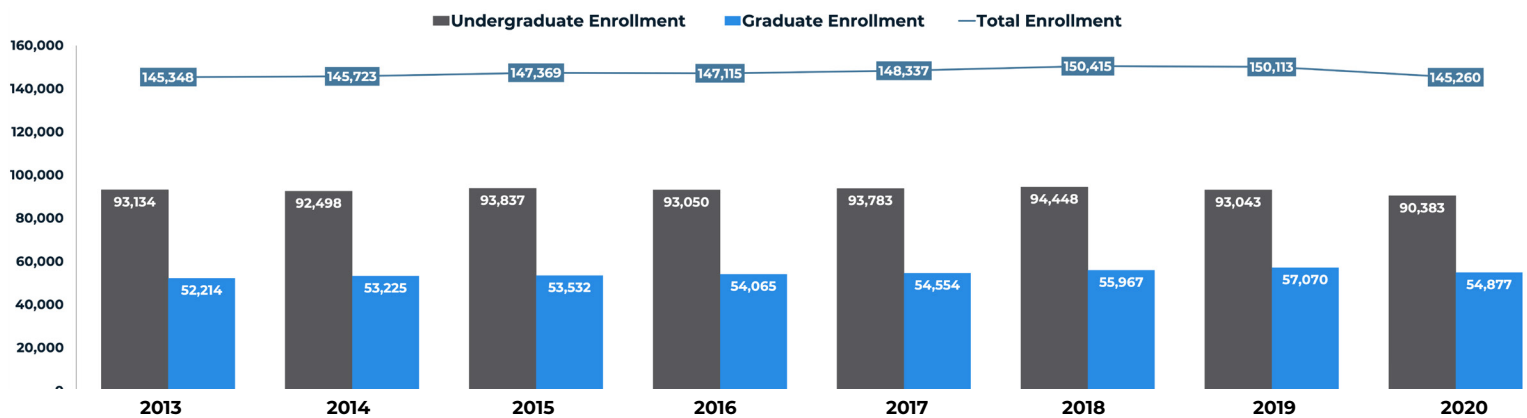
Institution Name	Total Enrollment Counts				Change 2013-2020		Change 2018-2020	
	2013 (Base Year)	2018	2019	2020	Count	Percentage	Count	Percentage
Massachusetts College of Art and Design (MassArt)	1,910	1,872	1,908	1,821	-89	-4.7%	-87	-2.7%
Massachusetts College of Pharmacy and Health Sciences (MCPHS)	4,469	4,448	4,323	4,275	-194	-4.3%	-48	-3.9%
Massachusetts Institute of Technology	11,301	11,558	11,387	11,258	-43	-0.4%	-129	-2.6%
MGH Institute of Health Professions	1,302	1,615	1,609	1,645	343	26.3%	36	1.9%
New England College of Optometry	502	521	540	528	26	5.2%	-12	1.3%
New England Conservatory of Music	812	838	843	701	-111	-13.7%	-142	-16.3%
New England Law Boston	964	542	696	905	-59	-6.1%	209	67.0%
Northeastern University	26,437	31,666	32,798	31,496	5,059	19.1%	-1,302	-0.5%
School of Museum of Fine Arts (Merged with Tufts)	651	0	0	0	-651	-100.0%	0	N/A
SHOWA Institute	263	252	236	287	24	9.1%	51	13.9%
Simmons University	3,972	3,440	3,360	3,268	-704	-17.7%	-92	-5.0%
St. John Seminary	192	148	90	108	-84	-43.8%	18	-27.0%
Suffolk University	8,437	6,970	6,825	6,576	-1,861	-22.1%	-249	-5.7%
Tufts University (Boston Campuses)	2,632	3,148	3,213	3,215	583	22.2%	2	2.1%
University of Massachusetts Boston	14,547	15,192	14,543	14,856	309	2.1%	313	-2.2%
Urban College Boston	767	874	750	463	-304	-39.6%	-287	-47.0%
Wentworth Institute of Technology	3,952	4,396	4,335	4,383	431	10.9%	48	-0.3%
Wheelock College (Merged with Boston University)	1,323	0	0	0	-1,323	-100.0%	0	N/A
Total Enrollment	144,792	150,415	150,113	145,260	468	0.3%	-5,155	-3.4%

Undergraduate enrollment declined by three percent (-2,751) from 93,134 in 2013 to 90,383 in 2020, while graduate enrollment continued to increase, rising 6.2 percent (+3,219) over the period (Table 2). Again, the expansion of graduate programs at Northeastern is primarily responsible for this rapid increase in graduate enrollment rates, despite the fact that Northeastern's graduate enrollment declined by 1,300 year-over-year. Since the pandemic, only Boston College, New England Law of Boston, and UMass Boston saw substantial enrollment growth adding 921 graduate students combined. In total, there were 2,660 fewer (-2.9 percent) undergraduates enrolled compared to last year, while the number of graduates enrolled decreased somewhat less with -2,193 (-3.8 percent) fewer students during the same period (see **Appendix B**).



Table 2: Total Enrollment Change by Class Level, 2013-2020

	2013 Base Year	2019	2020	2019-2020 Percent Change	2013-2019 Percent Change	2013-2020 Percent Change
Undergraduate Enrollment	93,134	93,043	90,383	-2.9%	-0.1%	-3.0%
Graduate Enrollment	51,658	57,070	54,877	-3.8%	10.5%	6.2%
Total Enrollment	144,792	150,113	145,260	-3.2%	3.7%	0.3%

Figure 1: Undergraduate, Graduate, and Total Enrollment, 2013-2020

Data from the National Clearinghouse shows a 2.5 percent postsecondary enrollment decline nationally in 2020; this was primarily led by undergraduates, which declined by 3.6 percent.⁵ Graduates, on the other hand, leveled off to -1 percent. In Boston, the impact of COVID-19 on enrollment rates was similar to the national context. However, graduate enrollments fell at a faster rate than undergraduates.

5 Source: National Student Clearinghouse Research Center Fall 2020



STUDENT HOUSING IN GREATER BOSTON: ON-CAMPUS AND OFF-CAMPUS

This section discusses all students enrolled in the higher learning institutions tracked by the City regardless of where they live. Given the shift to remote learning during the pandemic, it is assumed that a more significant portion of the off-campus population resided beyond greater Boston than in years past. However, student migration patterns are not possible to analyze with the available data.

As a result of COVID-19, there has been a sharp reduction in the number of students staying on-campus. In contrast, the number of students living at-home has increased nearly just as rapidly (see **Table 3**). The total number of students residing in private housing has remained virtually unchanged. However, the composition has shifted more toward undergraduates. **Table 3** provides a more detailed view of the changes in student living arrangements between 2019 and 2020.

Table 3: Change in Student Living Arrangement, 2019-2020⁶

Living Arrangement	2019	2020	Change	Percent Change	Percent Change in Distribution
On-Campus or University-Provided Housing	51,956	30,400	-21,556	-41.5%	-13.7%
Off-Campus (Living-at-Home) or Study Abroad/Co-op	33,343	47,248	13,905	41.7%	10.3%
Off-Campus (Not-at-Home)	63,511	63,352	-159	-0.3%	1.3%
Not Categorized	1,303	4,257	2,954	N/A	2.1%
Total	150,113	145,257	-4,856	-3.2%	N/A

6 The bulk of students in the Off-Campus (Living-at-Home) or Study Abroad/Co-op consist of students living-at-home, but are paired together in this table because they have no impact on the private housing market.



The following table shows that the number of students living in on-campus housing fell at a similar percent within City boundaries during the region's pandemic. This similarity is expected because the bulk of on-campus housing for students enrolled in Boston-based colleges exists within City limits. The number of students residing off-campus, on the other hand, increased outside of Boston but not within the City, suggesting that most students living on-campus in Boston found or returned to housing outside of the City. In the next section, we will examine student housing in Boston more closely.

Table 4: All Students vs. Students in Boston, Change in General Living Arrangement, 2019-2020

Living Arrangement	All Students			Students Within Boston		
	2019	2020	Percent Change	2019	2020	Percent Change
On-Campus	50,653	29,649	-41%	39,774	24,057	-40%
Off-Campus	99,460	115,606	16%	46,644	40,819	-12%

For Fall 2020, 29,649 students resided on-campus (21 percent of the total), dropping about 21,004 students from Fall 2019 (41.5 percent). Approximately 115,606 students (79 percent) lived off-campus. Of those living off-campus, 55 percent occupied private housing. The remaining 41 percent resided at home or were enrolled in a study abroad or co-op program and did not impact the private housing market (see **Table 5**).



Figure 2: Students by Housing Categories and Degree Level in Greater Boston, 2020⁷

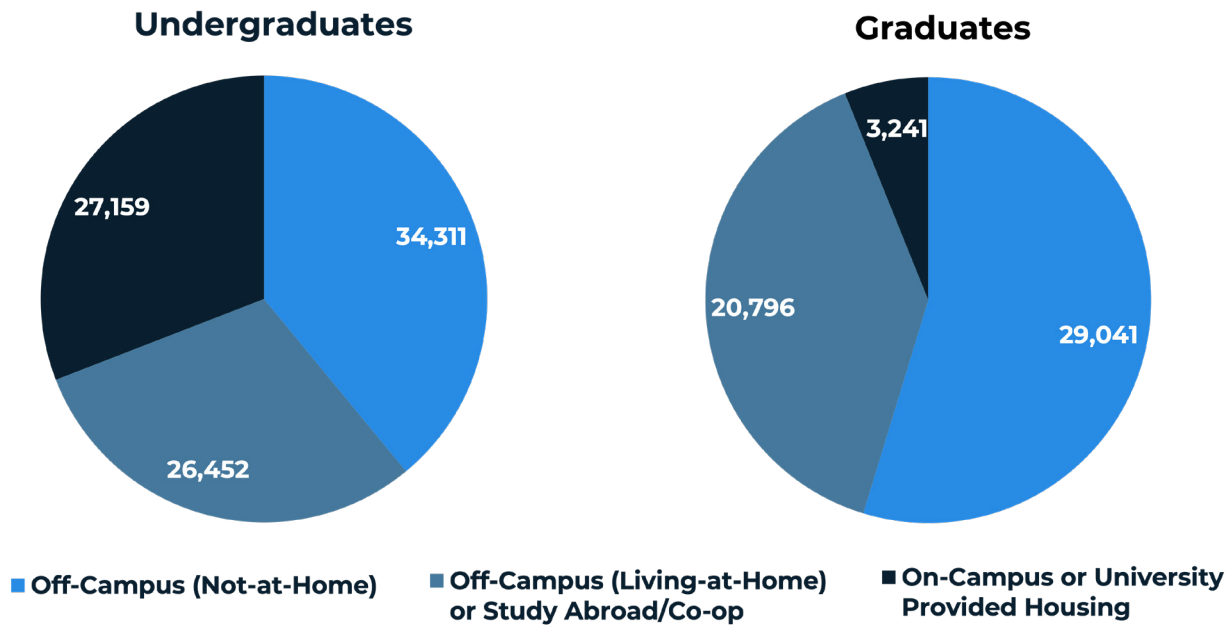


Table 5: Students by Housing Categories and Degree Level, 2020

Living Arrangement	Undergraduate Students	Graduate Students	Total	Percentage of Total
On-Campus or University-Provided Housing	27,159	3,241	30,400	20.9%
Off-Campus (Living-at-Home)	26,452	20,796	47,248	32.5%
Off-Campus (Not-at-Home)	34,311	29,041	63,352	43.6%
Non-Categorized	2,459	1,798	4,257	2.9%
Total	90,381	54,876	145,257	100.0%

⁷ Excludes uncategorized students, which are shown in table 5.



STUDENTS LIVING OFF-CAMPUS WITHIN THE CITY OF BOSTON

Although COVID-19 related restrictions had the impact of reducing the number of students housed on-campus, the number of students off-campus (not-at-home) did not rise in total or as a share of the entire student population residing in Boston. Only the number of students living at-home rose, both in absolute and as a share of the whole student population (**Table 6**).

Table 6: Change in Student Living Arrangement in Boston, 2019-2020

Living Arrangement	2019	2020	Change	Percent Change	Percent Change in Distribution
On-Campus or University-Provided Housing	40,933	24,057	-16,876	-41.2%	-19.5%
Off-Campus (Living-at-Home)	9,197	10,614	1,417	15.4%	1.6%
Off-Campus (Not-at-Home)	36,288	29,749	-6,539	-18.0%	-7.6%
Total	86,418	64,420	-21,998	-25.5%	N/A

For the Fall of 2020, the student population residing in Boston included 24,057 students (37.3 percent) residing on-campus or in university-provided housing and more than 40,300 (72.42 percent) students (72.4 percent) living off-campus (see table 4). The population residing on-campus/university-managed housing is primarily composed of undergraduate students (22,388 or 93 percent). On the other hand, the off-campus population is more evenly split between undergraduate and graduate students (**Table 7**).



Figure 3: Students by General Housing Categories and Degree Level in Boston, 2020⁸

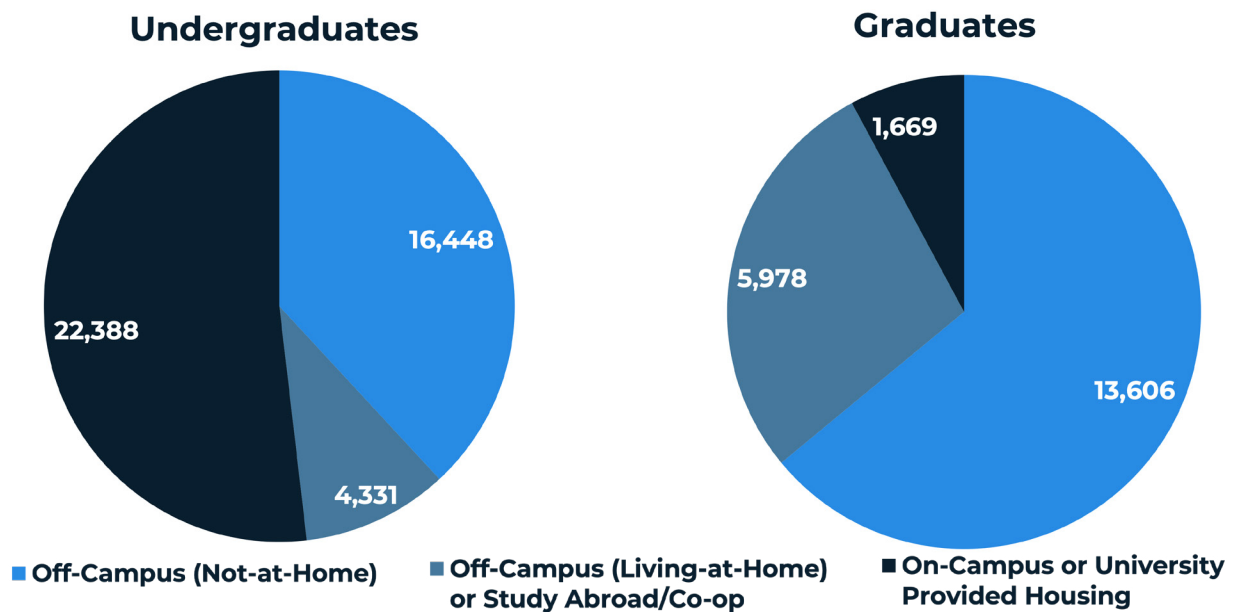


Table 7: Students by Housing Type and Degree Level in Boston, 2020

Living Arrangement	Undergraduate Students	Graduate Students	Total	Percentage of Total
On-Campus or University-Provided Housing	22,388	1,669	24,057	37.3%
Off-Campus (Living-at-Home)	4,426	6,188	10,614	16.5%
Off-Campus (Not-at-Home)	16,353	13,396	29,749	46.2%
Total	43,167	21,253	64,420	100.0%

As of this report, 16,353 undergraduate students are living in units in the private housing market. Also, close to 14,000 graduate students are living off-campus in private housing, bringing the total to 29,749 students exerting pressure on Boston's private housing market. The following tables shows the changes in student living arrangements for Boston comparing Fall 2019 to Fall 2020.

Table 8 shows the number of undergraduates reported by each school to be living in Boston's private housing market for 2019 and 2020. Overall, the number of undergraduate students in private housing has decreased by just over -2,700 students. This decrease is led by Berklee, which saw a drop of -1,549 undergraduate students in private housing. Suffolk University and UMass Boston both saw a decline of more than 350 students living in private housing.

⁸ Excludes uncategorized students, which are shown in table 6.



Table 8: Undergraduate Students Living Off-Campus (Not-At Home) in Boston⁹

Institution Name	2019	2020	2019 to 2020 Change	2019 to 2020 Percent Change
Bay State College	60	32	-28	-47%
Benjamin Franklin Institute of Technology	191	14	-177	-93%
Berklee College of Music	3,113	1,573	-1,540	-49%
Boston Architectural College	73	58	-15	-21%
Boston Baptist College	0	0	0	N/A
Boston College	1,111	1,334	223	20%
Boston Conservatory (Closed)	0	0	0	N/A
Boston University	3,314	3,211	-103	-3%
Emerson College	68	254	186	274%
Emmanuel College	156	78	-78	-50%
Fisher College	37	42	5	14%
Harvard University	0	0	0	N/A
MassArt	361	225	-136	-38%
MCPHS	817	638	-179	-22%
Massachusetts Institute of Technology	39	66	27	69%
MGH Institute of Health Professions	179	0	0	N/A
New England College of Optometry	0	0	0	N/A
New England Conservatory of Music	0	146	146	N/A
New England Law Boston	0	0	0	N/A
Northeastern University	4,860	4,635	-225	-5%
School of Museum of Fine Arts	0	0	0	N/A
SHOWA Institute	0	0	0	N/A
Simmons University	150	220	70	47%
St. John Seminary	2	3	1	N/A
Suffolk University	1,388	1,032	-356	-26%
Tufts University (Health Sciences)	21	22	1	N/A
University of Massachusetts Boston	2,464	2,088	-376	-15%
Urban College Boston	368	252	-116	-32%
Wentworth Institute of Technology	479	430	-49	-10%
Wheelock College (Closed)	0	0	0	N/A
Total	19,072	16,353	-2,719	-14%

⁹ This table includes both full-time and part-time students.



The graduate student population in private housing dropped at an even higher rate at 22 percent (-3,797). Northeastern University and Boston University dropped the most at 2,128 and 948, respectively.

Table 9: Graduate Students Living Off-Campus (Not-At-Home) In Boston^{10, 11}

Institution Name	2019	2020	2019 to 2020 Change	2019 to 2020 Percent Change
Bay State College	0	0	0	N/A
Benjamin Franklin Institute of Technology	0	0	0	N/A
Berklee College of Music	183	50	-133	-73%
Boston Architectural College	95	54	-41	-43%
Boston Baptist College	0	0	0	N/A
Boston College	894	821	-73	-8%
Boston University	5,058	4,115	-943	-19%
Emerson College	66	85	19	29%
Emmanuel College	0	0	0	N/A
Fisher College	3	5	2	N/A
Harvard University	463	417	-46	-10%
MassArt	40	29	-11	-28%
MCPHS	899	747	-152	-17%
Massachusetts Institute of Technology	393	399	6	2%
MGH Institute of Health Professions	0	0	0	N/A

¹⁰ Ibid.

¹¹ MGH Institute of Health Professionals, New England College of Optometry, New England Conservatory of Music, and New England Law of Boston, also did not distinguish between the off-campus subgroups, but their students are not included in this table as they most likely would be categorized as “living-at-home.”



Institution Name	2019	2020	2019 to 2020 Change	2019 to 2020 Percent Change
New England College of Optometry	0	0	0	N/A
New England Conservatory of Music	0	185	185	N/A
New England Law Boston	0	0	0	N/A
Northeastern University	5,837	3,709	-2,128	-36%
SHOWA Institute	0	0	0	N/A
Simmons University	400	306	-94	-24%
St. John Seminary	7	6	-1	N/A
Suffolk University	557	498	-59	-11%
Tufts University (Boston Campuses)	1,586	1,332	-254	-16%
University of Massachusetts Boston	711	621	-90	-13%
Urban College Boston	0	0	0	N/A
Wentworth Institute of Technology	24	17	-7	-29%
Total	17,193	13,396	-3,797	-22%

Institutions have chosen to enact different responses to COVID-19. Some schools, such as Emmanuel College, decided to close their residence halls completely. In contrast, other schools remained partly open at a reduced capacity. Those who have kept their on-campus housing partially open have implemented strict penalties, including expulsion of students who violate COVID-19 restrictions. Despite the school's best efforts, however, some local COVID-19 spikes have been traced back to students of Boston-area campuses, creating additional pressure on school officials to control the virus's spread among its student population.

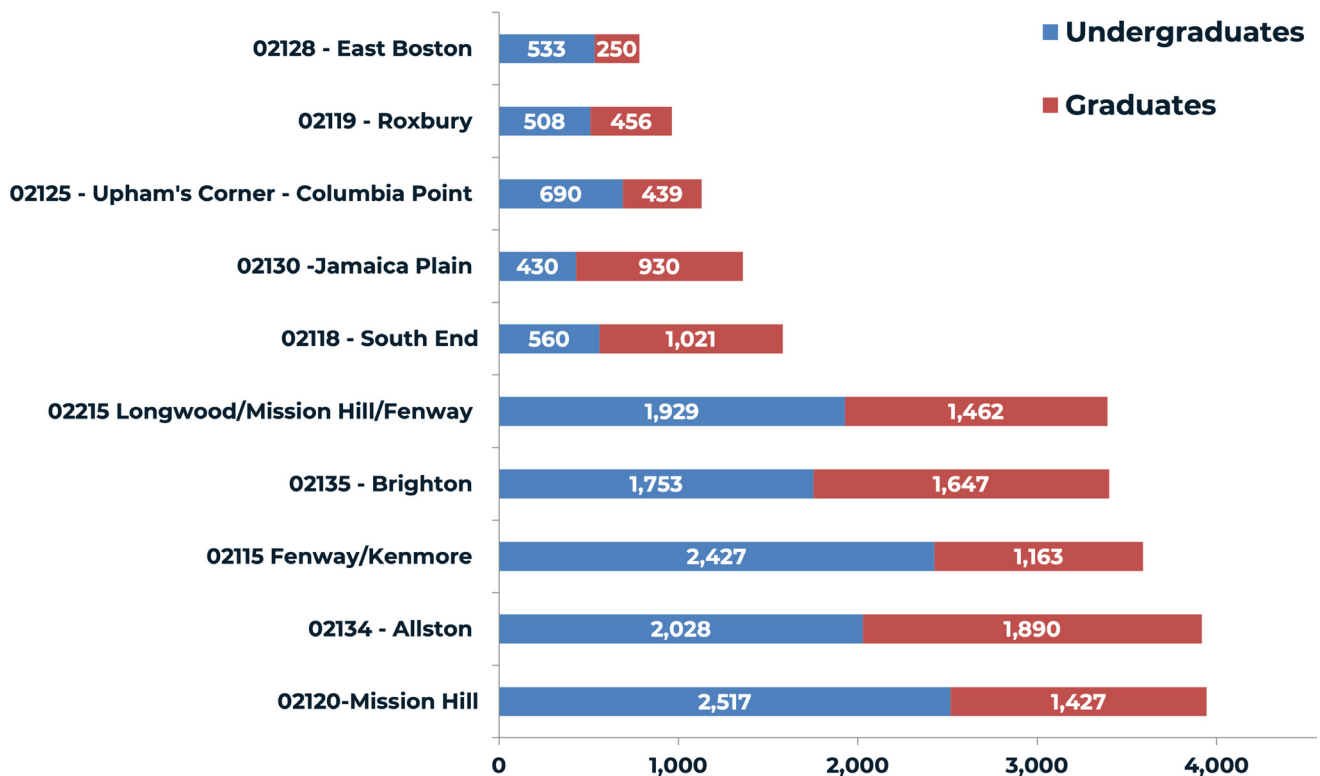


OFF-CAMPUS STUDENT HOUSING BY NEIGHBORHOOD

Figure 4 shows the geographic distribution of undergraduate and graduate students by neighborhood, using zip codes as a proxy for neighborhoods. Using zip codes for this analysis allows us to hone in on some smaller neighborhood areas, such as Mission Hill and Upham's Corner/Columbia Point. The same top five zip codes continue to have the greatest concentration as in previous years. However, Mission Hill has taken over the number one position for having the most students.

The top five zip codes in **Figure 5** represent 63 percent of the students living in Boston's private housing market. In comparison, the next five zip codes represent 23 percent of all student addresses. The remaining 14 percent of zip codes are scattered across many other zip codes. **Appendix D** contains the full-zip code data and additional neighborhood tables.

Figure 4: Top Ten Locations of Off-Campus Students by Zip Code in 2020



OFF-CAMPUS STUDENT HOUSING BY PROPERTY TYPE

This section focuses on the property types in which students (undergraduates and graduates) reside. Over half of Boston's off-campus (not-at-home) students (15,391) live in condominiums or properties with three or fewer units. These living arrangements place pressure on Boston's workforce housing market because one-, two- and three-family properties were initially built for Boston's workforce. At the same time, most condominiums were generally intended to be owner-occupied housing. In some cases, students live in condo 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 condo units are rented at a profit to students by investor-owners.

Table 10: Students Living Off-Campus by Housing Type¹²

	Property Type	2020 Student Count	Percentage of Addresses
Undergraduate Students	Small Properties (1-3 units)	6,360	22%
	Condominiums	2,481	9%
	Apartment Buildings (4 units or more)	3,678	13%
	Mixed-Use Properties	2,432	8%
	Other Properties	807	3%
Graduate Students	Small Properties (1-3 units)	3,744	13%
	Condominiums	2,180	8%
	Apartment Buildings (4 units or more)	3,468	12%
	Mixed-Use Properties	2,855	10%
	Other Properties	793	3%
All Students	Small Properties (1-3 units)	10,104	35%
	Condominiums	4,661	16%
	Apartment Buildings (4 units or more)	7,146	25%
	Mixed-Use Properties	5,287	18%
	Other Properties	1,600	6%

¹² Based on geocoded Off-Campus addresses obtained from Fall 2020 University Accountability Reports. 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 it 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 (non-subsidized, co-ops or group quarters [e.g. group quarters]) are buildings with 4+ units (codes 111-114 and 120) 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

The City is at 61 percent of its current target towards meeting its goal of creating 18,500 new dorm-beds by 2030.

So far, the total built and planned production includes more than 11,000 dorm-beds consisting of those created since 2014 (6,441), in large project review (1,900), and future commitments in the pipeline (2,731) (**Table 11**). After considering past and planned dorm-bed demolitions, the net built and planned production is just under 8,000 (43 percent of the total goal), leaving nearly 10,500 beds left to create.

In order to meet the long term goal, the Boston Planning & Development Agency will continue to work with colleges and universities to plan for more student housing as part of their Institutional Master Plans.

Table 11: Current Progress on Goal of Producing 18,500 New Dorm Beds¹³

Goal	Number of Beds	Percentage of Total
Beds Built From 2014-2020	6,441	35%
Currently Under or Soon to be Under Construction	0	0%
In Large Project Review	1,900	11%
Pipeline (Future Commitments)	2,731	15%
Total Built and Planned Production	11,072	61%
Demolitions from 2014-2020	-1,196	-6%
Planned Demolitions	-1,869	-11%
Net Built and Planned Production	8,007	43%
Beds Left to Create	10,493	57%

In the 2019 report, it was reported that the total undergraduate housing needs were 23,815 beds. Due to the reduced enrollments and closed dorms during 2020, an accurate count of future demand is not possible. Given that most institutions are planning to resume in-person learning for the fall of 2021, estimates of need will resume in our next report.

Table 12 focuses on the schools with dorm-beds in the pipeline. Pipeline activity has remained largely the same as last year. There are more than 2,700 net new beds across the entire pipeline, including demolitions. Among the pipeline's highlights include UMass Boston, which has another 1,000 dorm-beds planned in the future. Additionally, Berklee, Boston College, and Boston University have just more than 1,500 beds in the pipeline.

¹³ Previous versions of this table included dorms built since 2011. The count starting point has been moved to 2014 to conform to the *Housing Boston 2030* reporting baseline.



Table 12: Institutions With Planned Dorm Additions

Institution	In Large Project Review	New Dorm Beds in Pipeline	Current or Planned Demolitions	Net Beds
Berklee College of Music	0	450	0	450
Boston College	0	550	0	550
Boston University	0	523	0	523
Northeastern University	800	0	-625	175
Simmons University	1,100	0	-1,036	64
University of Massachusetts Boston	0	1,000	0	1,000
Wentworth Institute of Technology	0	208	-208	0
Total	1,900	2,731	-1,869	2,762

Recent new dormitory buildings, such as the Lightview at Northeastern and Residence Hall 1 at UMass Boston, have been developed by partnering with private developers. The emerging national trend for private dormitory creation is one way to unlock faster student housing production. Interest from private developers to create dorms for students independent of any particular school reflects the high level of interest in building dorms for Boston's student population. However, neighborhood opposition has made some developers intending to construct independent student dorms pivot from their plans. Universities must address this opposition to new dorms, whether university or privately-owned, to meet the production goals.

Private developers can help develop graduate student housing, which can be more challenging than undergraduate housing since graduate students' housing needs can vary more. Nonetheless, successful planning and development for graduate housing can occur. MIT's recent Kendall Square Initiative, which just opened two new residences, is an example of thoughtful and thoroughly planned development (there were 80+ community meetings) focused on graduate student housing. It will help ease the graduate dorm-bed gap in the region. As undergraduate enrollment continues to be static and graduate programs continue to expand, future student housing products will need to be developed to be flexible to these ongoing changes.



Other benefits of dealing with private developers are that it allows institutions to have more financial flexibility and minimize the potential debt load of new student housing developments. Private developers can also own and operate the residential portions of new developments, relieving institutions of this responsibility. Private developers can even help deliver students' amenities as institutions compete more aggressively to enroll students.

The City will continue to hold universities accountable for making significant capital investments in student housing creation. However, the addition of other private developers working in partnership with schools to provide student-specific housing could positively affect affordability in Boston by freeing up housing units.



CONCLUSION

The goal of the annual Student Housing Trends Report is to monitor the progress towards reducing the number of students living in Boston's neighborhoods, putting pressure on our local housing market.

Previous reports have shown increases in the number of students living on campus and increases in graduate student enrollment. The COVID-19 pandemic upended these trends, and there was a reduction of the number of students in the City in 2020.

Most universities have announced a return to in-person learning for Fall 2021, but we still do not know the long-term effects of the COVID-19 pandemic on the overall health and the in-person student enrollment in Boston's institutions of higher education. The pandemic has raised some important questions about the future of universities, such as:

- Will international enrollment in Boston's universities return to pre-pandemic levels? If so, when?
- Will virtual learning replace in-person learning and lead to enrollment declines?
- How many more colleges and universities will close or merge as a result of COVID-19 and/or broader changes in higher education?

While the changes in the higher education industry may take several years to fully manifest, the City will continue to advocate for an increase in university provided housing, both for undergraduate and graduate students.



APPENDIX A: 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 live (on-campus or off-campus). The overall quality of the reporting has improved with each of the past reports since the 2013 baseline. However, this has created some complications in analyzing trends over time due to these comparability issues. What follows is a brief discussion of the data issues involved with the primary 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, Colleges did not separate the off-campus numbers into the sub-categories of students living *off-campus (living-at-home)*, *off-campus (not-at-home)*, and *living in university-managed housing*, which most schools have reported since 2014. Therefore, these constraints limit the comparison to baseline data. Furthermore, a small number of institutions have not made these distinctions in any UAR report.

Off-Campus (Living-at-Home):

This category was formerly called “commuters” in earlier reports. This category refers to a living arrangement where students live 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 they live before becoming a student and not obtained for the sole purpose of having a place to stay while being a student. Generally, living-at-home is when the “local/mailling” address and the “home/permanent” address are the same in the institutional database.



Off-Campus (Not-at-Home):

This category was formerly called “private-housing” in earlier reports. This category refers to when students do not live with their parents or legal guardians or in any housing facility 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/mailling” address and the “home/permanent” address are not the 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 to obtain more accurate address data, these addresses are reported by students and subject to errors. Some of the address data may reflect the addresses of students living-at-home as opposed to not-at-home. Given that the City is interested in students’ impacts on the private housing market, inaccurate and incorrectly identified address data can impact this analysis’s results.

Geographic Distribution:

Currently, the student housing report does not compare students’ geographic distribution with earlier reports because of data incompatibilities. Until the data becomes more comparable across years, we will refrain from presenting students’ chances for a given neighborhood.

Other issues with some UARs, particularly in previous reports, include lack of address standardization and quality control checks, including online or students in satellite campuses, and data submission before the final student census date.



APPENDIX B: ENROLLMENT

Table B1 and B2 provide more information on total enrollment at each college or university by class level. Table B3 provides more information on enrollment by full-time or part-time status.

Table B1: Undergraduate Enrollment Change by School and Class Level¹⁴

Institution Name	2013 (Base Year)	2019	2020	Change Since 2013	Percent Change Since 2013	YOY Change	YOY Percent Change
Bay State College	1,098	442	372	-726	-66.1%	-70	-15.8%
Benjamin Franklin Institute of Technology	463	529	370	-93	-20.1%	-159	-30.1%
Berklee College of Music	4,402	5,134	4,537	135	3.1%	-597	-11.6%
Boston Architectural College	407	265	240	-167	-41.0%	-25	-9.4%
Boston Baptist College	96	65	58	-38	-39.6%	-7	-10.8%
Boston College	9,049	9,370	9,445	396	4.4%	75	0.8%
Boston Conservatory (Merged with Berklee)	545	0	0	-545	N/A	0	N/A
Boston University	16,871	17,254	16,446	-425	-2.5%	-808	-4.7%
Emerson College	3,720	3,888	3,716	-4	-0.1%	-172	-4.4%
Emmanuel College	2,059	2,017	1,786	-273	-13.3%	-231	-11.5%
Fisher College	978	774	660	-318	-32.5%	-114	-14.7%
Harvard University (Boston Campuses)	0	0	0	0	N/A	0	N/A
MassArt	1,776	1,780	1,704	-72	-4.1%	-76	-4.3%
MCPHS	3,499	2,738	2,782	-717	-20.5%	44	1.6%
Massachusetts Institute of Technology	4,528	4,531	4,365	-163	-3.6%	-166	-3.7%
MGH Institute of Health Professions	307	509	502	195	63.5%	-7	-1.4%
New England College of Optometry	0	0	0	0	N/A	0	N/A
New England Conservatory of Music	430	497	404	-26	-6.0%	-93	-18.7%
New England Law Boston	0	0	0	0	N/A	0	N/A

¹⁴ Total enrollment figures include both full-time and part-time students.



Institution Name	2013 (Base Year)	2019	2020	Change Since 2013	Percent Change Since 2013	YOY Change	YOY Percent Change
Northeastern University	17,924	18,990	18,958	1,034	5.8%	-32	-0.2%
School of Museum of Fine Arts (Merged with Tufts)	484	0	0	-484	N/A	0	N/A
SHOWA Institute	263	236	287	24	9.1%	51	21.6%
Simmons University	1,732	1,779	1,792	60	3.5%	13	0.7%
St. John Seminary	43	24	22	-21	-48.8%	-2	-8.3%
Suffolk University	5,593	4,909	4,385	-1,208	-21.6%	-524	-10.7%
Tufts University (Boston Campuses)	0	307	376	376	N/A	69	22.5%
University of Massachusetts Boston	11,533	12,064	12,497	964	8.4%	433	3.6%
Urban College Boston	767	750	463	-304	-39.6%	-287	-38.3%
Wentworth Institute of Technology	3,708	4,191	4,216	508	13.7%	25	0.6%
Wheelock College (Merged with Boston University)	859	0	0	-859	N/A	0	N/A
Total Enrollment	93,134	93,043	90,383	-2,751	-2.9%	-2,660	-2.9%

Table B2: Graduate Enrollment Change by School and Class Level¹⁵

Institution Name	2013 (Base Year)	2019	2020	Change Since 2013	Percent Change Since 2013	YOY Change	YOY Percent Change
Bay State College	0	0	0	0	N/A	0	N/A
Benjamin Franklin Institute of Technology	0	0	0	0	N/A	0	N/A
Berklee College of Music	117	254	218	101	86.3%	-36	-14.2%
Boston Architectural College	318	369	237	-81	-25.5%	-132	-35.8%
Boston Baptist College	0	0	0	0	N/A	0	N/A
Boston College	4,476	4,801	5,125	649	14.5%	324	6.7%
Boston Conservatory (Merged with Berklee)	229	0	0	-229	N/A	0	N/A
Boston University	10,637	12,169	11,985	1,348	12.7%	-184	-1.5%

¹⁵ Ibid.



Institution Name	2013 (Base Year)	2019	2020	Change Since 2013	Percent Change Since 2013	YOY Change	YOY Percent Change
Emerson College	803	1,046	617	-186	-23.2%	-429	-41.0%
Emmanuel College	261	102	108	-153	-58.6%	6	5.9%
Fisher College	0	77	108	108	N/A	31	40.3%
Harvard University (Boston Campuses)	3,830	4,101	3,447	-383	-10.0%	-654	-15.9%
MassArt	134	128	117	-17	-12.7%	-11	-8.6%
MCPHS	970	1,585	1,493	523	53.9%	-92	-5.8%
Massachusetts Institute of Technology	6,773	6,856	6,893	120	1.8%	37	0.5%
MGH Institute of Health Professions	995	1,100	1,143	148	14.9%	43	3.9%
New England College of Optometry	502	540	528	26	5.2%	-12	-2.2%
New England Conservatory of Music	383	346	297	-85	-22.3%	-49	-14.2%
New England Law Boston	964	696	905	-59	-6.1%	209	30.0%
Northeastern University	8,513	13,808	12,538	4,025	47.3%	-1,270	-9.2%
School of Museum of Fine Arts (Merged with Tufts)	167	0	0	-167	N/A	0	N/A
SHOWA Institute	0	0	0	0	N/A	0	N/A
Simmons University	2,240	1,581	1,476	-764	-34.1%	-105	-6.6%
St. John Seminary	149	66	86	-63	-42.3%	20	30.3%
Suffolk University	2,844	1,916	2,191	-653	-23.0%	275	14.4%
Tufts University (Boston Campuses)	2,632	2,906	2,839	207	7.9%	-67	-2.3%
University of Massachusetts Boston	3,014	2,479	2,359	-655	-21.7%	-120	-4.8%
Urban College Boston	0	0	0	0	N/A	0	N/A
Wentworth Institute of Technology	244	144	167	-77	-31.6%	23	16.0%
Wheelock College (Merged with Boston University)	464	0	0	-464	N/A	0	N/A
Total Enrollment	51,658	57,070	54,877	3,219	6.2%	-2,193	-3.8%



Table B3: Enrollment by Degree Level and Full-Time and Part-Time Status, 2020¹⁶

Institution Name	Undergraduate Enrollment			Gduate Enrollment		
	Full-Time	Part-Time	Total	Full-Time	Part-Time	Total
Bay State College	284	88	372	0	0	0
Benjamin Franklin Institute of Technology	341	29	370	0	0	0
Berklee College of Music	3,940	597	4,537	214	4	218
Boston Architectural College	236	4	240	228	9	237
Boston Baptist College	42	16	58	0	0	0
Boston College	9,445	0	9,445	3,456	1,669	5,125
Boston University	16,179	267	16,446	9,879	2,106	11,985
Emerson College	3,633	83	3,716	526	91	617
Emmanuel College	1,745	41	1,786	0	108	108
Fisher College	578	82	660	21	87	108
Harvard University (Boston Campuses)	0	0	0	3,026	421	3,447
MassArt	1,504	200	1,704	85	32	117
MCPHS	2,548	234	2,782	1,460	33	1,493
Massachusetts Institute of Technology	4,238	127	4,365	6,766	127	6,893
MGH Institute of Health Professions	171	331	502	817	326	1,143
New England College of Optometry	0	0	0	528	0	528
New England Conservatory of Music	374	30	404	270	27	297
New England Law Boston	0	0	0	698	207	905
Northeastern University	18,811	147	18,958	11,607	931	12,538

16 Ibid



Institution Name	Undergraduate Enrollment			Gduate Enrollment		
	Full-Time	Part-Time	Total	Full-Time	Part-Time	Total
SHOWA Institute	287	0	287	0	0	0
Simmons University	1,657	135	1,792	783	693	1,476
St. John Seminary	22	0	22	60	26	86
Suffolk University	4,163	222	4,385	1,307	884	2,191
Tufts University (Boston Campuses)	366	10	376	2,761	78	2,839
University of Massachusetts Boston	10,145	2,352	12,497	1,140	1,219	2,359
Urban College Boston	52	411	463	0	0	0
Wentworth Institute of Technology	3,847	369	4,216	85	82	167
Total Enrollment	84,608	5,775	90,383	45,717	9,160	54,877



Chart B1: Top 10 Schools by Total Enrollment Change from 2013 to 2020

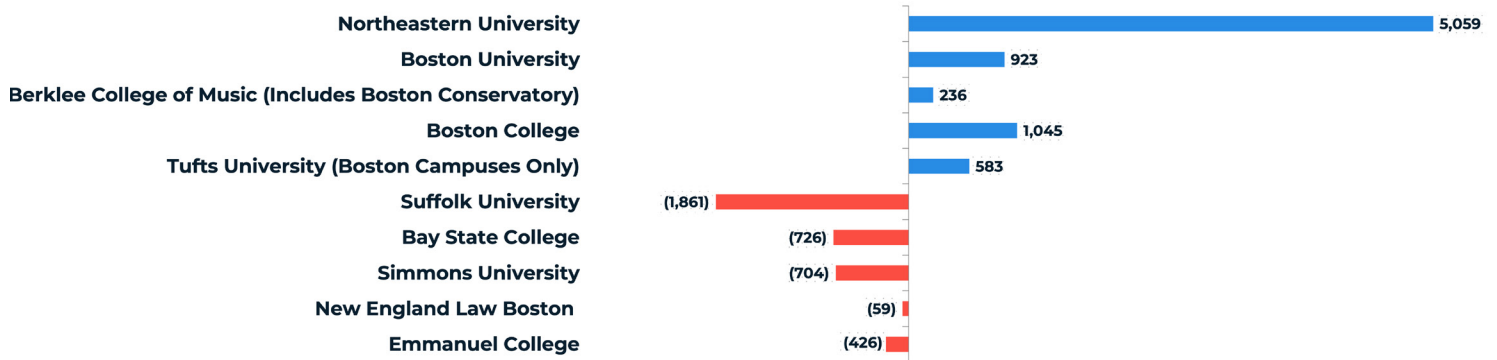
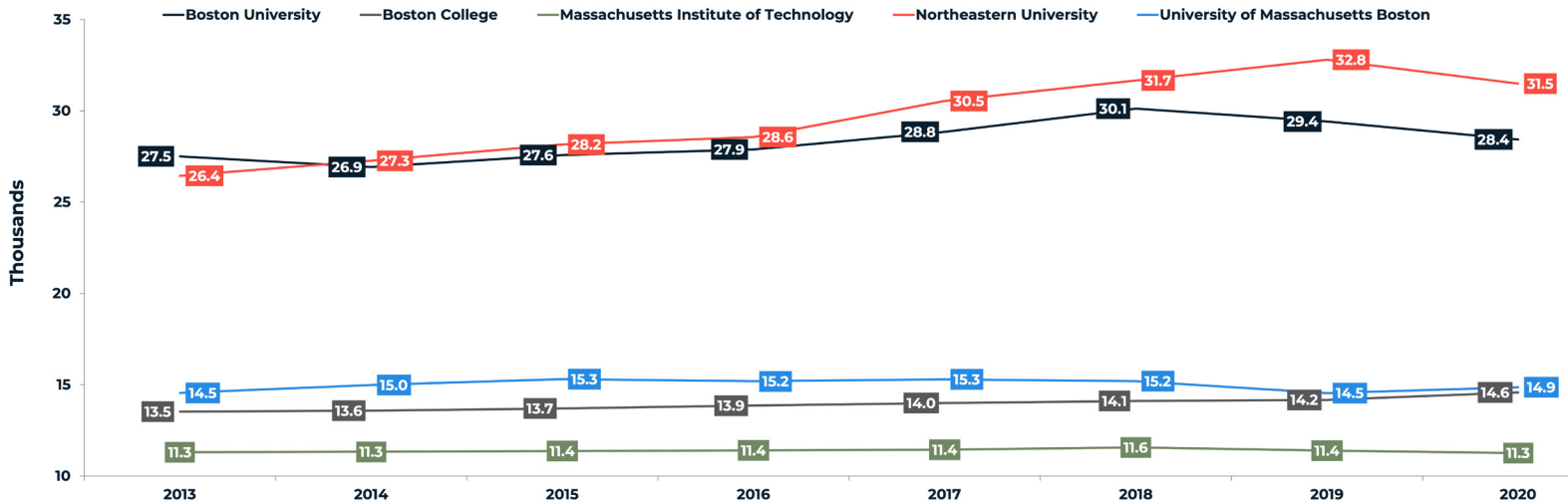


Chart B2: Total Enrollment for Schools with At Least 10,000 Students



APPENDIX C: STUDENTS OFF-CAMPUS (NOT-AT-HOME) IN BOSTON, 2020

Chart C1: Top 10 Schools by Undergraduate Students In Private Housing

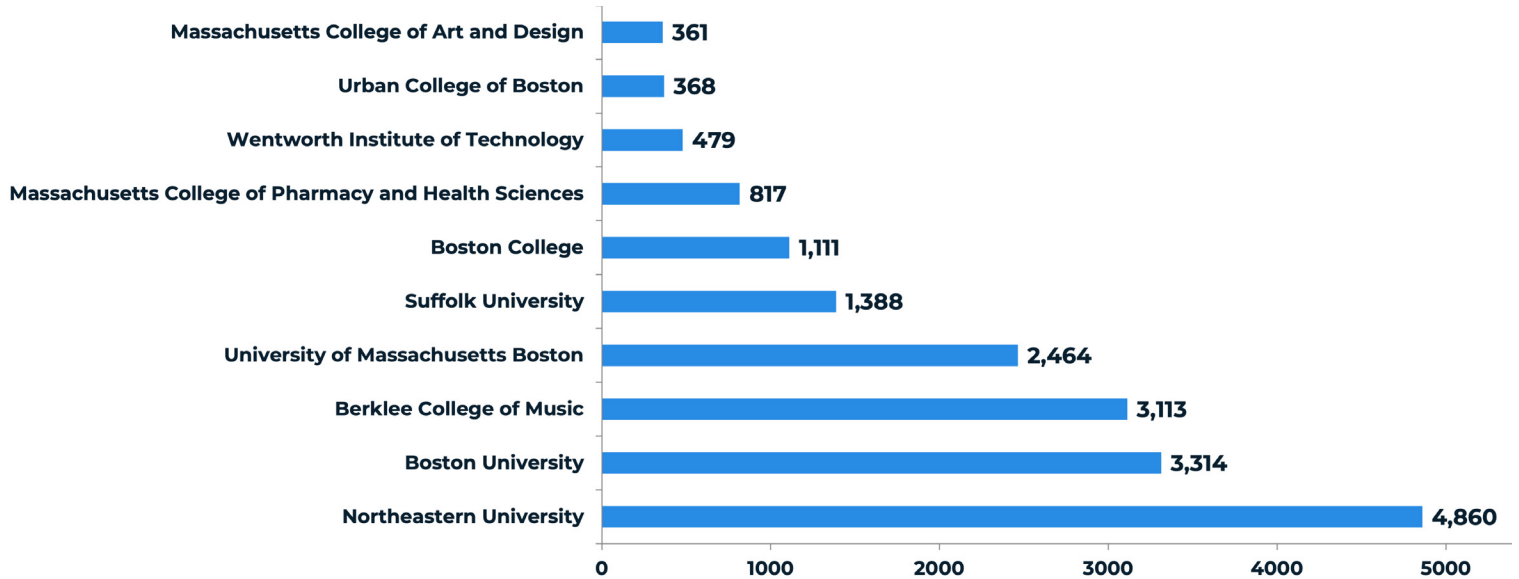
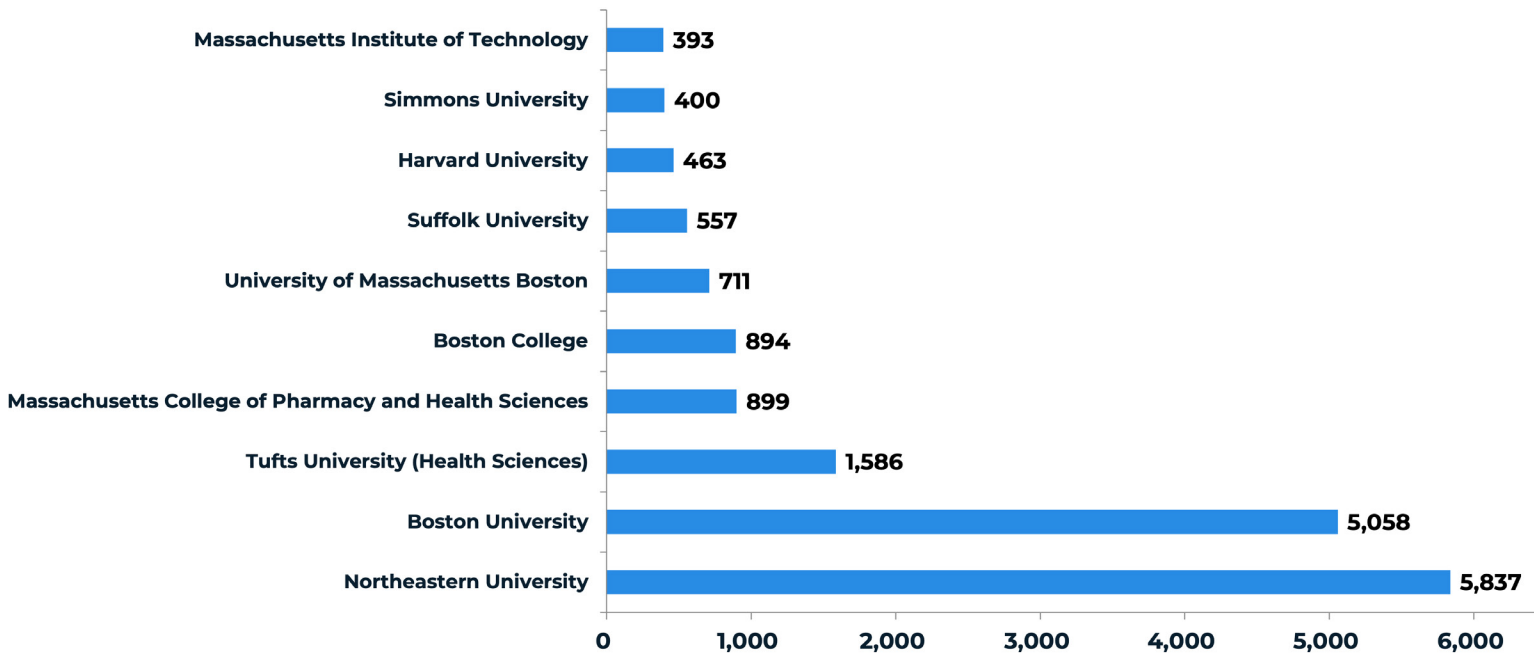
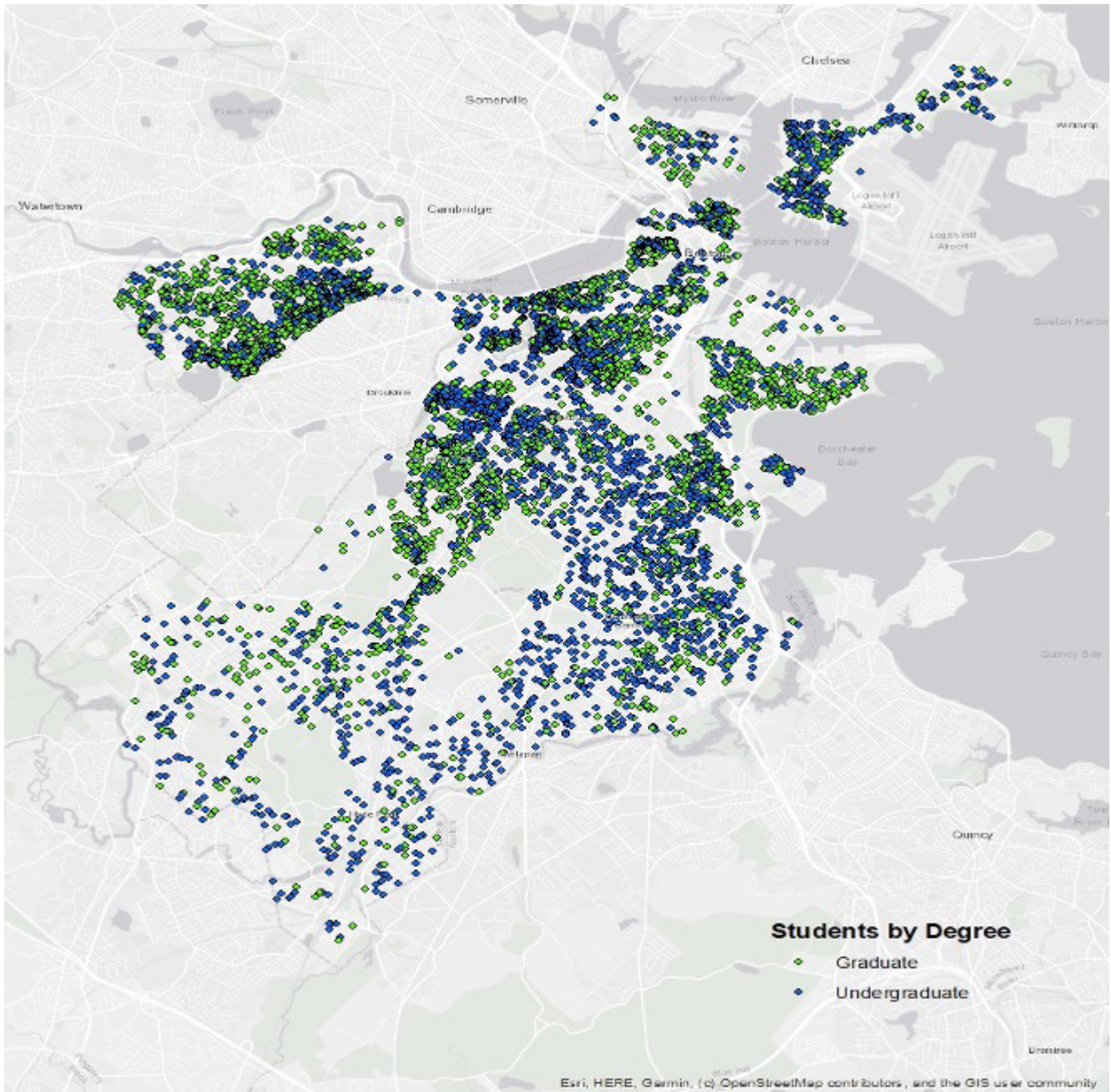


Chart C1: Top 10 Schools by Undergraduate Students In Private Housing



APPENDIX D: STUDENT DISTRIBUTION MAPS AND TABLES¹⁷

Map D1: Off-Campus (Not-at-Home) Student Distribution



¹⁷ Based on geocoded off-campus addresses obtained from Fall 2020 University Accountability Reports. Neighborhood boundaries are based on DND and BPDA geographies and may not necessarily align with neighborhood boundaries from other sources. Student locations are primarily for off-campus students not-at-home, but about one percent of the addresses are estimated to be students living-at-home.



Map D2: City Of Boston Off-Campus Student Hotspots

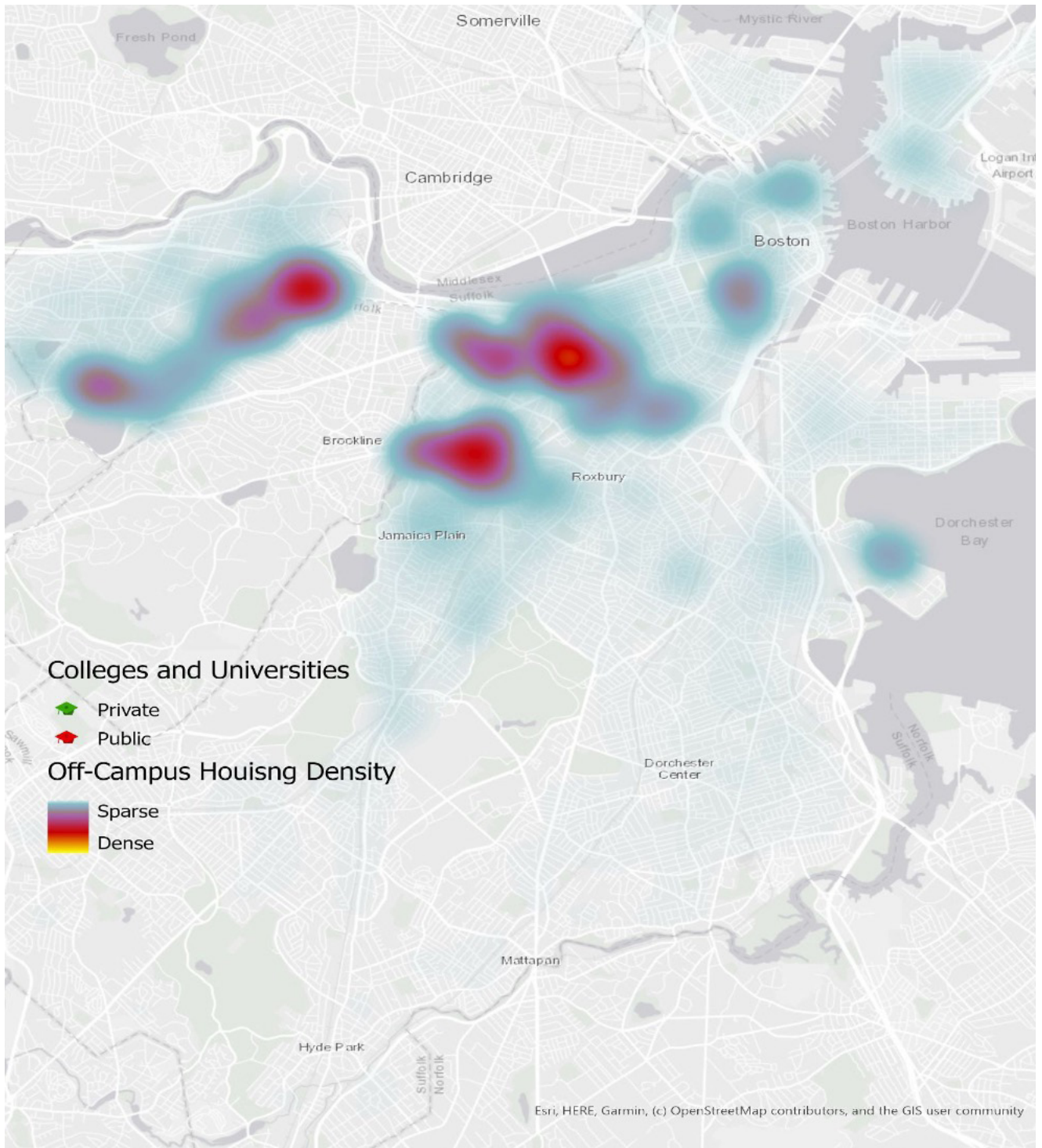


Table D1: Off-Campus (Not-At-Home) Students by the Department Of Neighborhood Development (DND) Districts¹⁸

Neighborhood	Undergraduate Students	Graduate Students	Total	Percentage of Grand Total
Allston/Brighton	4,100	3,657	7,757	26.9%
Back Bay/Beacon Hill	724	704	1,428	4.9%
Central	726	1,019	1,745	6.0%
Charlestown	65	78	143	0.5%
Dorchester	1,022	564	1,586	5.5%
East Boston	529	244	773	2.7%
Fenway/Kenmore	3,559	2,434	5,993	20.8%
Hyde Park	174	48	222	0.8%
Jamaica Plain	2,582	1,885	4,467	15.5%
Mattapan	172	41	213	0.7%
Roslindale	183	171	354	1.2%
Roxbury	786	690	1,476	5.1%
South Boston	141	371	512	1.8%
South End	909	1,115	2,024	7.0%
West Roxbury	109	76	185	0.6%
Total	15,781	13,097	28,878	100.0%

¹⁸ DND Districts are boundaries originally created to facilitate the comparison of U.S. Census Bureau's demographic and economic data. These boundaries are outdated but still used by DND to allow compatibility with other data sets and historical data. For student data by more contemporary neighborhood outlines, see table D2.



Table D2: Off-Campus (Not-At-Home) Students by Boston Planning and Development Agency (BPDA) Districts¹⁹

Neighborhood	Undergraduate Students	Graduate Students	Total	Percentage of Grand Total
Allston	2,365	2,055	4,420	15.3%
Back Bay	722	619	1,341	4.6%
Bay Village	13	41	54	0.2%
Beacon Hill	142	197	339	1.2%
Brighton	1,735	1,602	3,337	11.6%
Charlestown	65	78	143	0.5%
Chinatown	199	333	532	1.8%
Dorchester	1,189	617	1,806	6.3%
Downtown	293	325	618	2.1%
East Boston	529	244	773	2.7%
Fenway	3,301	1,815	5,116	17.7%
Hyde Park	160	46	206	0.7%
Jamaica Plain	398	867	1,265	4.4%
Leather District	10	43	53	0.2%
Longwood Medical Area	36	91	127	0.4%
Mattapan	117	37	154	0.5%
Mission Hill	2,400	1,679	4,079	14.1%
North End	195	193	388	1.3%
Roslindale	133	96	229	0.8%
Roxbury	1,211	748	1,959	6.8%
South Boston	125	340	465	1.6%
South Boston Waterfront	17	35	52	0.2%
South End	291	827	1,118	3.9%
West End	26	93	119	0.4%
West Roxbury	109	76	185	0.6%
Total	15,781	13,097	28,878	100.0%

¹⁹ BPDA's neighborhood boundaries are a combination of zoning boundaries, zip code boundaries and 2010 Census tract boundaries. These boundaries are used in the broad sense for visualization purposes for zoning and planning studies. However these boundaries are not official boundaries for the City of Boston. The BPDA is not responsible for any districts or boundaries within the City of Boston except for the districts or boundaries used for zoning and planning studies.



Table D3: Off-Campus (Not-At-Home) Students by Zip Codes

Neighborhood by Zip Code	Undergraduates	Graduates	All Students	Percentage of All Students	Percentage of Tier/Group
02120 Mission Hill	2,517	1,427	3,944	13.6%	63%
02134 Allston	2,028	1,890	3,918	13.5%	
02115 Fenway/Kenmore	2,427	1,163	3,590	12.4%	
02135 Brighton	1,753	1,647	3,400	11.8%	
02215 Longwood/ Mission Hill/ Fenway	1,929	1,462	3,391	11.7%	
02118 South End	560	1,021	1,581	5.5%	23%
02130 Jamaica Plain	430	930	1,360	4.7%	
02125 Upham's Corner/ Columbia Point	690	439	1,129	3.9%	
02119 Roxbury	508	456	964	3.3%	
02128 East Boston	533	250	783	2.7%	
02113 North End	175	152	327	1.1%	4%
02122 Bowdoin	197	75	272	0.9%	
02131 Roslindale	138	106	244	0.8%	
02136 Hyde Park	172	46	218	0.8%	
02121 Dorchester	99	76	175	0.6%	
Other	5050	340	845	2.9%	3%
Total Zip Codes	15,805	13,117	28,922	100%	100%

