UBC Student Housing Demand Study

FINAL REPORT

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Submitted By:
McClanaghan & Associates
Email: dale_mcclan@telus.net

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UBC Campus & Community Planning
Student Housing & Hospitality Services

Purpose

UBC Vancouver is transitioning from a commuter campus to a sustainable campus community. A significant expansion in housing for graduate and undergraduate students has occurred over the past 15 years with the addition of approximately 3,800 new student beds on campus. Today, UBC provides approximately 8,680 beds for student living on campus for an estimated on-campus population of 11,000 students and student family members.

Campus & Community Planning (C&CP), and Student Housing & Hospitality Services (SHHS) commissioned a study in 2008 to prepare a housing demand forecast for on-campus student housing. The study is part of the Campus Plan process, and also responded to the AMS request which was based on their major policy paper in 2008. The analysis set out in this report included a comprehensive student survey and a series of focus group sessions designed to explore the full range of student housing needs, as well as a benchmarking survey which made comparisons with other comparable universities.

The results of the analysis show that the demand for additional on-campus housing is significant and that UBC should plan to provide capacity for at least 45% of full-time students to live-on campus.[1] The analysis also showed that the demand pressures and competitive nature of the Vancouver rental housing market will continue to have a significant impact on the off-campus housing choices available to students. UBC will need almost 6,400 new student housing beds over next 20 years just to maintain the current availability of student housing choices in the face of on-going pressures in the Vancouver rental market.

The study findings confirm that there is a high level of interest in living on campus among those who are currently living in different housing arrangements off campus, and that the level of demand could be even higher given the significant social and academic advantages that on-campus living brings to the university experience, and that many students indicate they want. The feedback received through this study, also suggests that many students face long commuting times, difficulty in finding suitable housing and on-going affordability pressures.

Working with a Steering Committee of representatives from across the university community including representatives from the societies representing graduate and under-graduate students, this study was designed to gain a better understanding of the nature of student housing demand and related issues.

[1] The work to date on the Campus Plan provides capacity to accommodate up to 50% of the estimated number of full time students.

In preparing the on-campus student housing demand forecast set out in this report, a major focus was on analyzing the choices available to UBC students both on and off campus.[2] This included:

- The current housing demand profile;
- The current housing and living arrangements;
- The geographic distribution and housing preferences of students;
- The propensity of students to share accommodation and the number of students sharing;
- Housing costs and affordability; and,
- Commuting distances and travel times.

The analysis also took into consideration broader systemic and market forces including:

- The expected increase in the student population;
- The expected increase in non-student housing demand; and,
- The expected increase/decrease in housing supply in key Vancouver neighbourhoods.

Data on the Vancouver rental housing market was also analyzed. This included information from the 2006 Census as well as information on average rents and vacancy rates for different unit sizes and types as reported by Canada Mortgage and Housing Corporation (CMHC) through their annual rental market survey.

The Research Approach

In preparing the student housing demand forecast, the following actions were taken:

1. Analysis of administrative data provided by the Office of the Registrar to develop a profile of the 32,981 full-time and near full-time students currently enrolled at UBC;

2. Analysis of the results of a web-based survey[3] of students living on and off campus including information on their current housing situation, housing choices, and housing needs;

[2] This was done through a web-based survey which received 5,684 responses from students living both on campus and off campus. There were a total of 2,401 responses from student living on campus and 3,283 responses from students living off campus. Detailed results from the survey, as well as a copy of the survey instrument are included in the Technical Appendices that have been prepared to complement this report.

3. Analysis of the data provided by the Financial Awards Office including information on the number of applicants, the number of awards granted, and the average award amount in order to understand some of the potential implications and constraints with respect to affordability;

4. Analysis of feedback gathered through stakeholder interviews including members of the Study Steering Committee;

5. Analysis of feedback gathered through a series of focus group sessions including students living on campus, students living off campus who wished to live on campus, and students who were satisfied living off campus; and,

6. Administration of a benchmarking study to other comparable universities to determine the extent to which they were experiencing similar challenges and pressures.

This report sets out a 20 year housing demand forecast for on-campus student housing along with the high level findings used to guide and inform the development forecast model. Additional details related to each of the different elements can be found in the Technical Appendices which have been prepared to complement this report.

The Nature of Student Housing Demand

Housing choices always include some mix of housing preferences and price, as well as trade-offs around factors such as location, amenity, condition and affordability. These choices are further shaped by the availability of suitable housing within a given market. In a conventional housing analysis, one of the central features is affordability, usually expressed as a percentage of household income relative to housing costs.

Student housing affordability adds another layer of complexity in that many students have limited incomes and significant financial obligations including tuition payments, rent and basic living expenses. While many students are able to rely on assistance from parents and other sources, others are dependent on student loans and grants to help them make ends meet.

In preparing the student housing demand forecast set out in this report, a central focus was on understanding the inter-relationship between student housing choices on campus and the housing choices available to students living off campus. In looking at the different housing choices, the analysis considered the trade-offs between factors such as independence,

[3] The 5,684 responses generated through the web-based survey represent approximately 17% of the full-time graduate and under-graduate student population. A sample of this size provides a high degree of confidence in the reliability of the reported findings both at the aggregate and sub-group level.

autonomy, affordability, suitability, adequacy and proximity to campus. These different trade-offs were tested through a survey of students living on and off campus which was initiated in March 2009.

In terms of student housing choices, it is important to recognize that students also possess a unique set of circumstances which influence their housing choices. This includes the need to attend classes at a central location, affordability concerns (often closely linked to family resources) and the desire to engage in a variety of on-campus activities that, for many, help to enrich their post secondary student experience.[4]

For students living off campus, access to campus is an important consideration and is central to the housing decisions they make. Outside of those living at home, it is likely that students will be looking for housing choices and opportunities which ensure that they can live close to campus, or at the very least have good access to transit in order to provide them with the opportunity to engage in the different social, cultural and recreation activities that are part of the broader campus experience.[5]

In examining the range of factors influencing student housing choices, it is necessary to consider both push-related and pull-related factors. Push-related factors are those which result from increased competition for available units or the lack of availability of suitable housing choices, and that lead to a situation in which individuals have less control over the decisions that they make, or are 'pushed' towards specific decisions or choices about their housing. In the case of on-campus housing, it is possible that students are pushed into making other housing choices simply out of the lack of available spaces on campus. Resource constraints, personal circumstances as well as income or local market conditions can also be seen as factors which may push an individual into making a specific housing choice.[6]

Pull-related factors, on the other hand, are decisions that individuals make based on their preferences or requirements and generally involve a significant degree of choice. In the case of on-campus housing, pull-related factors could be seen as those which draw individuals towards specific choices. This could include factors such as convenience, proximity to campus, enhanced student engagement, as well as access to specific services and amenities.

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4 Among those living on campus, 81% indicated that the academic benefits of living on campus were important or very important while 76% indicated that the social benefits and a close connection to the larger university experience were strong reasons for choosing to live on campus.

5 Among the survey respondents living off campus, 65% were living west of Main Street.

6 Among those living off campus, average reported rents were approximately 22% lower for those living one hour from campus compared to those living between 11 to 20 minutes away.

The housing choices available in the broader Vancouver rental housing market can also have an impact on the demand for on-campus housing. In particular, it should be noted that, as the choices in the Vancouver rental market become more constrained through on-going growth pressure or the on-going loss of rental units, the demand for on-campus housing will increase.

Key Findings

The following reflect some of the key findings and observations to emerge through this study:

- Students are frequently required to look for housing in a competitive housing market. Furthermore, while the vacancy rate for rental housing in the Vancouver market has shown a slight improvement in recent months[7], the Vancouver region has traditionally been seen to have some of the lowest vacancy rates and highest rents in the country[8]. These types of rental market conditions can make it difficult for students to have quality choices about where they live and can often lead to on-going affordability pressure.

- Proximity to campus is a significant factor in shaping the off-campus housing choices for many students. This was tested through the collection of student addresses by postal code and data related to average commuting times. Once those who are still living in the family home are removed from the analysis the data shows that 65% of students living off campus are likely to be living in neighbourhoods west of Main Street or in areas which have good access to transit.

- There is a clear spatial or locational aspect to the housing choices that many students make. At the same time, access to transit is also an important consideration with 86% of survey respondents identifying proximity to transit as an important factor in shaping their housing decision. At the same time, proximity to campus was also ranked highly in terms of the housing choices that students make. [9]

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[7] The most recent *Rental Market Report* published by CMHC (April 2009) reported a 1.9% vacancy rate within the Metro Vancouver rental market area with an average market rent of $982 per month.
[8] This observation was confirmed through the results of the benchmarking study which included questions of local market conditions. A full copy of the results of the benchmarking study and the market comparisons can be found in the Technical Appendices which has been prepared to support this study.
[9] Among those who responded to the survey, 86% ranked proximity to transit as being important to their housing choices while 67% identified proximity to campus as an important consideration.

- Growth in the number of non-student households from in-migration into Vancouver is also a factor which can affect the housing choices available. Based on the most recent housing demand estimates prepared by Canada Mortgage and Housing Corporation (CMHC) it is expected that there will be an annual increase in housing demand of between 16,000 and 18,000 households per year across the Metro Vancouver region. This will result in increased competition for available units and is likely to make it more difficult for students to find suitable and appropriate housing.

- It is estimated that approximately 35% of the increase in housing demand in the Vancouver CMA will be in the form of rental demand[10]. Assuming an annual increase of between 16,000 and 18,000 households per year, this can mean an annual increase of between 5,600 and 6,300 new renter households per year. Data for Vancouver shows an average annual increase of only 560 new rental housing units per year over the past 10 years (1999 to 2008).[11] This is well below the level required to keep pace with demand. In addition, without an increase in the supply of rental housing, the increased competition for available units can lead to upward pressure on rents and can further erode affordability.

- On-going growth pressures will also result in increased ownership demand. This can affect the supply of single detached houses available for rent as the value and desirability of this form of housing continues to increase. In particular, the demand for this form of housing can mean that the attractiveness of retaining this housing as rental housing is diminished. This was reflected in the most recent Census data where the data shows that, for the period between 2001 and 2006, the total number of rental housing units across the City of Vancouver dropped by 1,220 with a large proportion of the change being reflected in changes in the rented single detached stock.

- Neighbourhood development patterns can also have an impact on the profile of the housing stock as single detached homes which were previously rented are sold or demolished in order to build new ownership units.[12] The loss of this form of housing can have a significant impact on student housing choices, not only from the fact that this stock represents an

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[10] These estimates were presented at the CMHC Housing Outlook Conference (November 2009) and are based on current population trends and household projections.

[11] Over the last 5 years (2003 to 2008) there were 1,145 new purpose-built rental housing units constructed across Vancouver. This represents an average of 229 units per year. Of these units, almost 47% were construction at UBC. The construction of these units is important in terms of off-setting the loss of units in other parts of the City. The other area which saw a significant increase in new supply was downtown Vancouver. However, this was mostly in the form of higher end condo stock.

[12] Shared houses are a popular form of housing for students. Based on the results of the off-campus student survey, approximately 1 in 5 students reported that they currently live in this form of housing.

important segment of the rental housing continuum, but also from the fact that rented single detached homes can often accommodate a large number of students[13].

- Another observation to emerge through the study relates to the expansion in the range of on-campus housing choices and food service options available. In looking at the full array of on-campus housing choices, it is clear that the on-campus housing available through UBC has developed appeal which extends beyond the traditional younger, undergraduate cohort. This observation was confirmed through the responses received through the web-based survey in which a significant number of students living off campus reported that they would prefer to live on campus if they could.[14] Similarly, the university currently has a waiting list of more than 400 students who have indicated an interest in on-campus housing if space becomes available.

- The results from the benchmarking survey completed as part of this study showed that many universities faced constraints on the supply of available land and did not have the same growth potential as UBC. At the same time the feedback received suggested that the local market conditions, both in terms of vacancy and affordability of units was typically not as challenging as in the Vancouver market.

Findings of the Student Housing Demand Forecast under the Two Scenarios

In preparing the student housing demand forecast, the following scenarios were considered:

Scenario 1: Held student enrolment constant at 2008 levels (n=30,560 students) and included an assessment of the impact of the following external market pressures:

a. Constraints on the number of new rental housing units being added in the broader Vancouver market;

b. A decline in the available supply of rental units in key Vancouver neighbourhoods including rented single detached homes, rented secondary suites, and garden and basement suites;

c. The potential impact of on-going growth pressure and increased competition from non-student households moving to the City of Vancouver and the Metro Vancouver region; and,

d. The potential effects of on-going price increases and affordability pressures in the private rental market.

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[13] Sixty nine percent of those living in shared households reported that they were typically sharing with 2 or more other people. Therefore, for every single detached home that is lost from the rental housing supply, it is possible that up to three students could be displaced.

[14] Approximately 27% of students living off campus indicated that they would like to live on campus if they could. At the same time, 43% indicated that they might be interested in living on campus depending on the housing type.

The results of the analysis are shown in Table 1:

Student Housing Demand Forecast Scenario #1	**5 years (to 2013)**	**10 years (to 2018)**	**15 years (to 2023)**	**20 years (to 2028)**	**Total**
Decline in available supply relative to student housing units in the Vancouver Rental Market	7.7%	8.0%	8.2%	8.5%	32.5%
Full-Time Students	30,560	30,560	30,560	30,560	30,560
Growth Pressure: Demand Increase + Supply Decrease (UNITS)	727	750	774	801	3,052 units
Growth Pressure: Demand Increase + Supply Decrease (STUDENTS)	1,227	1,266	1,307	1,352	5,152 beds
Decline in available supply relative to student housing units in the Vancouver Rental Market	7.7%	8.0%	8.2%	8.5%	32.5%
Full-Time Students	30,560	30,560	30,560	30,560	30,560
Students Housed on Campus	9,877	11,143	12,451	13,803	13,803
% of Full-Time Students Housed on Campus	32.3%	36.5%	40.7%	45.2%	45.2%

Table 1: Estimated On-Campus Housing Demand (Holding Enrolment Constant)

Scenario 2: Maintained all of the assumptions of the first scenario but assumed that there would be a modest increase in student enrolment (approximately 9%).

Student Housing Demand Forecast Scenario #2	**5 years (to 2013)**	**10 years (to 2018)**	**15 years (to 2023)**	**20 years (to 2028)**	**Total**
Full-Time Students	30,560	33,362	33.362	33,362	33,362
Students Housed on Campus	10,554	12,385	13,692	15,044	15,044
Growth Pressure: Demand Increase + Supply Decrease (UNITS)	1,128	1,084	774	801	3,787 units
Growth Pressure: Demand Increase + Supply Decrease (STUDENTS)	1,904	1,803	1,307	1,352	6,366 beds
Decline in available supply relative to student housing units in the Vancouver Rental Market	12.0%	11.5%	8.2%	8.5%	39.2%
% of Full-Time Students Housed on Campus	33.0%	37.1%	41.0%	45.1%	45.1%

Table 2: Estimated On-Campus Housing Demand (increase of 2,800 students-9% growth)

Under Scenario 1, even without an increase in student enrolment, the university would have to plan to add 5,152 spaces or approximately 3,052 additional units of on-campus housing just to maintain the current availability of student housing within the broader rental housing market. Under the second scenario, assuming a modest increase in student enrolment, UBC would have to plan to add 6,366 spaces or approximately 3,787 new on-campus housing units.

In putting forward these estimates, the analysis is intended to help to provide important data for informing UBC's planning activities and for guiding and informing future planning decisions. At the same time, it is important to recognize that the timing of the construction of the units as well as decisions around establishing targets for the proportion of on-campus student housing are decisions which should be evaluated within the broader context of UBC's strategic goals and objectives.

The next section lays out in more detail the full on-campus housing demand estimates along with the key underlying assumptions.

The On-Campus Student Housing Demand Forecast—Method and Assumptions

A major output from this study was the development of a 20 year housing demand forecast which sets out the estimated demand for on-campus student housing. The demand forecast which was developed covers the period from 2008 to 2028.

This section sets out some of the key findings and assumptions used in preparing the demand forecast. This includes consideration of:

- The inter-relationship between student housing choices on campus and the housing choices available to students living off campus.[15] The study assumes that changes in the available choices off campus can have an impact on the demand for on-campus housing.
- The different trade-offs and choices that students make around independence, autonomy, suitability, adequacy and proximity to campus, as well as specific consideration related to affordability.
- The impact of changes in the broader Vancouver rental housing market and the potential implications for the demand for on-campus housing including consideration of the potential implications arising from on-going population, household growth, and increased student enrolment.[16]
- The impact of changes in the profile of the current housing stock including changes in the types of units available for rent, as well as potential pressures arising from the on-going loss of rental units in key Vancouver neighbourhoods.
- The potential implications of on-going tight rental market conditions in the Vancouver market including potential implications related to on-going affordability pressures.

In modeling the different scenarios set out in this report, it is clear that many of the pressures identified would be made worse if alternate sources of new rental supply are not found or if the supply of rental housing continues to lag behind demand.

[15] The study assumes that changes in the available choices off-campus can have an impact on the demand for on-campus housing.

[16] This number assumes only modest increases of 3,000 full-time student over 20 years.

Scenario Testing and Data Modeling

In order to estimate the potential future demand for on-campus housing, this report modelled a number of different scenarios. As set out at the beginning of this report, it is acknowledged that student housing choices typically include different requirements and trade-offs when compared with other types of households.

In order to gain a better understanding of the nature of the choices and trade-offs among students this study relied on a number of different data sources including an analysis of the administrative data maintained by UBC as well as feedback received from 5,684 students who responded to the web-based survey.

In preparing the on-campus housing demand forecast the following variables were analyzed:

- The current housing demand profile;
- The current housing and living arrangements;
- The geographic distribution and housing preferences of students;
- The propensity of students to share accommodation and the number of students sharing;
- Housing costs and affordability; and,
- Commuting distances and travel times.

The analysis also took into consideration broader systemic and market forces including:

- The expected increase in the student population;
- The expected increase in non-student housing demand; and,
- The expected increase/decrease in rental housing supply in key Vancouver neighbourhoods.

The Current Housing Demand Profile

The analysis of the current housing demand profile was constructed from a number of different sources including information obtained from the Office of the Registrar, as well as from the results of the web-based survey.

To understand the current housing situation and housing choices of UBC students, this study examined the administrative data maintained by UBC for 32,981 full-time or near full-time graduate and under-graduate students enrolled at UBC.

The administrative data obtained from the Office of the Registrar included general socio-demographic data on the student population including information on their age, gender, graduate and undergraduate status, as well as information on the mailing address, postal code and home community[17] of students attending UBC. It also included information on the high school that students attended prior to coming to UBC.

While the mailing information was not necessarily reliable in terms of understanding the current housing choices across the student population, an analysis of mailing addresses combined with information on the high school that the student attended prior to admission to UBC helped to provide a better sense of the number of students who were from the Metro Vancouver and Fraser Valley market areas.

The analysis of the administrative data showed that approximately 31% of all full-time or near full-time students enrolled at UBC had attended high school locally and still have a mailing address in the same municipality. These general findings were compared with the feedback received through the off-campus survey which also showed that approximately 34% of those living off campus were still living at home.[18]

In looking at the specific housing circumstances for those who were still living at home, it was clear that this segment of the student population does not have the same housing requirements as other segments of the student population. However, commuting times and access to transit remain important issues. Similarly, many of those living at home may be conscious of the affordability pressures in the broader rental market.

For the purposes of preparing the on-campus housing demand forecast, the student population was segmented by postal code and then grouped into different zones.

- Zone 1 includes students from the Vancouver market area.
- Zone 2 includes students from North Vancouver, Burnaby, New Westminster, and the Tri-Cities.
- Zone 3 includes students from Surrey, Richmond, Pitt Meadows, Maple Ridge, Langley, and the Fraser Valley.

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[17] There are some limitations to this data as the address information could refer to the home address of the student or the address where the student is currently living. To address this constraint the administrative data was cross-referenced with the results from the web-based survey to determine the degree of alignment.

[18] When asked about their current living arrangements, 34% of off-campus respondents reported that they were living in the family home. The large sample size of the web-based survey and the relative alignment between the two different data sources helps to provide a high degree of confidence in the findings.

- Students from outside the Vancouver market area (international students, or students from other parts of BC or Canada) were assumed to be living in the Vancouver market area.[19]

The study assumed that all of those from Zone 1 (Vancouver) were still living at home or on campus.

Among those from Zone 2, it was assumed that 60% were still living at home while 40% had sought housing in the Vancouver area. For those from Zone 3 it was assumed that 50% had relocated to the Vancouver rental market or to the UBC campus.

A comparison of the feedback received through the survey of students living off campus helped to confirm and validate these assumptions.[20] In particular, the findings from the web-based survey showed that the majority of students not living at home (77%) were likely to be living in the Vancouver market area.

For the purpose of the analysis, it was assumed that the distribution of students relocating to Vancouver would be distributed within the City in the same proportion as respondents to the web-survey (along a distribution by postal code).

The table on the following page shows the general distribution of UBC students across the different postal codes and neighbourhoods once these different assumptions were applied.

[19] For the purposes of the analysis, this segment of the student population was distributed across the Vancouver market area.

[20] The feedback received through the web-based survey was seen as a reliable indication of the types of choices/preferences students make, in terms of the geographic location of the housing and the proximity to campus, as well as in terms of the different housing types and living arrangements.

Table 3	UBC Student Place of Residence Estimate							
		Adjusted Data Base - Registar						
			Vancouver Market Estimate					
Postal Code	Neighbourhood	Total, Reg. data	At Home est.	In Market	Zone 2 adjust.	Zone 3 adjust.	Outside Lower Mainland	**Total Estimated UBC students in Vanc'r Market**
V6K	Kits	**1,101**	131	970	340	192	315	**1816**
V6R	Pt Grey	**975**	194	781	273	154	254	**1462**
V6L	Arbutus	**376**	203	173	61	34	56	**324**
V6P	Kerrisdale	**846**	464	382	134	75	124	**715**
V5R	Renfrew Collingwood	**537**	293	244	85	48	79	**457**
V6J	Fairview	**620**	98	522	183	103	169	**977**
V6M	Shaughnessy	**541**	262	279	98	55	91	**522**
V6E	West End	**388**	35	353	124	70	115	**661**
V6B	Downtown	**336**	36	300	105	59	97	**562**
V6N	Dunbar Southlands	**529**	234	295	103	58	96	**552**
V5T	Commercial Dr	**375**	52	323	113	64	105	**605**
V6H	Fairview	**526**	98	428	150	85	139	**801**
V5Z	Fairview Cambie	**550**	156	394	138	78	128	**738**
V5N	Kennsigton	**402**	147	255	89	50	83	**477**
V6Z	West End	**270**	36	234	82	46	76	**438**
V6S	Dunbar	**353**	93	260	91	51	84	**487**
V6G	West End	**305**	20	285	100	56	93	**534**
V5Y	Mt. Pleasant	**308**	115	193	68	38	63	**361**
V5P	Victoria-Fraserview	**456**	317	139	49	27	45	**260**
V5X	Sunset	**305**	197	108	38	21	35	**202**
V5V	Mt Pleasant	**326**	133	193	68	38	63	**361**
V5S	Killarney	**374**	276	98	34	19	32	**183**
V5W	Riley Park	**234**	109	125	44	25	41	**234**
V5L	Granview Woodlands	**220**	42	178	62	35	58	**333**
V5M	Hastings Sunrise	**239**	163	76	27	15	25	**142**
V6A	Strathcona	**104**	28	76	27	15	25	**142**
V5K	Hasings Sunrise	**95**	14	81	28	16	26	**152**
V6C	DTES	**32**	4	28	10	6	9	**52**
V6T	UBC	**8,399**	0	8,399	84	84	84	**8650**
	Vancouver & UBC	**20,122**	3,950	16,172	2,806	1619	2,607	**23,204**
	Estimate of Vancouver Market			7,773	2,722	1,535	2,523	**14,554**
	Zone 2	**7,014**			4,208			**4,208**
	Zone 3	**3,238**				1,619		**1,619**
	Outside Canada	**363**					0	**0**
	Elsewhere in BC	**1,725**					0	**0**
	Elsewhere in Canada	**519**					0	**0**
TOTAL Full Time Students		**32,981**	3,950	16,172	7,014	3,238	2,607	**32,981**
Zone 2 - North Van.; Burnaby, New West., Tri-cities								
Zone 3 - Surrey, Richmond, Pitt Meadows, Langley & Fraser Valley								

The Current Housing and Living Arrangements

The second major area which was analyzed in preparing the on-campus student housing demand forecast examined the different types of housing and living arrangements reported by UBC students. This included an analysis of the feedback received through the web-based survey in terms of the different types of housing choices that were identified. As shown in Table 4, excluding those who were living at home:

- 39% of students living off campus reported that they were living in apartment type arrangements. This could include the existing purpose-built rental housing stock as well as rented condo apartment units;
- 28% of students living off campus reported that they live in a garden or basement suite while approximately 19% of students reported that they shared a house.
- The remaining 14% of students reported that they live in a variety of different housing arrangements including student housing, social housing or couch surfing. A small number of respondents also reported that they own their own home.

In general, the different types of housing arrangements identified by those living off campus are consistent with the types of choices one would expect both in terms of the choices that are available as well as the choices that students are likely to make.

Housing Arrangements (Excluding Those Living At Home)	Number of Respondents	Percentage of Respondents
Apartment	779	39.4%
Garden or basement suite	553	28.0%
Shared house	375	19.0%
Couch surfing	6	0.3%
Student housing	23	1.2%
Social housing	11	0.6%
Own their own home	181	9.2%
Other	50	2.5%
Total (Excluding Not Living at Home and Non-Responses)[21]	1978	100%

Table 4: Housing Arrangements of Off-Campus Students (n=1,978)

[21] There were a total of 1,034 individuals who indicated that they were living at home.

Table 5 shows the general distribution of housing choices across the different neighbourhoods and postal codes.

Table 5 (n=1,387)		Type of Housing Arrangements				
		Shared house	Garden or Basement Suite	Apartment	Other	Total
Neighbourhood	Postal Code					
Kits	V6K	9%	55%	9%	27%	100%
Pt Grey	V6R	13%	19%	63%	6%	100%
Arbutus	V6L	31%	38%	31%	0%	100%
Kerrisdale	V6P	35%	16%	39%	10%	100%
RenfrewCollingwood	V5R	18%	50%	9%	23%	100%
Fairview	V6J	14%	33%	33%	19%	100%
Shaughnessy	V6M	18%	55%	18%	9%	100%
West End	V6E	21%	8%	58%	14%	100%
Downtown	V6B	30%	45%	13%	13%	100%
DunbarSouthlands	V6N	33%	46%	17%	4%	100%
Commercial Dr	V5T	38%	38%	15%	8%	100%
Fairview	V6H	29%	43%	21%	7%	100%
Fairview Cambie	V5Z	12%	39%	39%	10%	100%
Kennsigton	V5N	8%	8%	42%	42%	100%
West End	V6V	0%	0%	64%	36%	100%
Dunbar	V6S	0%	0%	100%	0%	100%
West End	V6G	0%	0%	100%	0%	100%
Mt. Pleasant	V5Y	2%	4%	87%	6%	100%
Victoria-Fraserview	V5P	5%	3%	88%	3%	100%
Sunset	V5X	10%	18%	58%	13%	100%
Mt Pleasant	V5V	18%	26%	50%	7%	100%
Killarney	V5S	10%	73%	13%	5%	100%
Riley Park	V5W	15%	35%	50%	0%	100%
GrandviewWoodlands	V5L	31%	57%	8%	5%	100%
Hastings Sunrise	V5M	19%	27%	49%	4%	100%
Strathcona	V6A	25%	44%	25%	5%	100%
Hasings Sunrise	V5K	26%	65%	3%	6%	100%
DTES	V6C	16%	10%	52%	23%	100%
UBC	V6T	100%	0%	0%	0%	100%
Selected Postal Code		19%	30%	42%	9%	100%
Sample Distribution		22%	32%	46%	0%	100%

The Geographic Distribution and Housing Preferences of UBC Students

In addition to looking at the different types of housing choices that students make, the feedback received through the survey showed that proximity to campus and access to transit are both important factors in shaping the decisions that students make about where to live.

Table 6 shows the average commuting times reported across those living off campus. As shown in Table 6, 41% of respondents reported that it takes them over 40 minutes to get to campus. This translates into a minimum commute of 1 hour and 20 minutes each day.[22]

	Including those Living at Home		**Excluding those Living at Home**	
Time to Get to Campus	**# of Students**	**%**	**# of Students**	**%**
Less than 10 minutes	112	3.4%	100	4.4%
11-20 minutes	443	13.5%	374	16.6%
21-30 minutes	482	14.7%	403	17.9%
31-40 minutes	416	12.7%	318	13.8%
41-50 minutes	370	11.3%	217	9.6%
51-60 minutes	402	12.2%	207	9.2%
More than an hour	581	17.7%	223	9.9%
Unknown	33	1.0%	30	1.3%
Total	2,839	86.5%	1,864	82.9%
No response	444	13.5%	385	17.1%
Total responses	3,283	100%	2,249	100%

Table 6: Time Required to Commute to Campus (n=3,283)

Spatial Considerations

The feedback received through the web-based survey shows that a large proportion of the off-campus student population lives in one of ten neighbourhoods: Kitsilano, Point Grey, Kerrisdale, Dunbar, Oakridge, Arbutus, Shaughnessy, South Cambie, Marpole, and Fairview. In addition, approximately 11% of the off-campus student population live in the West End.

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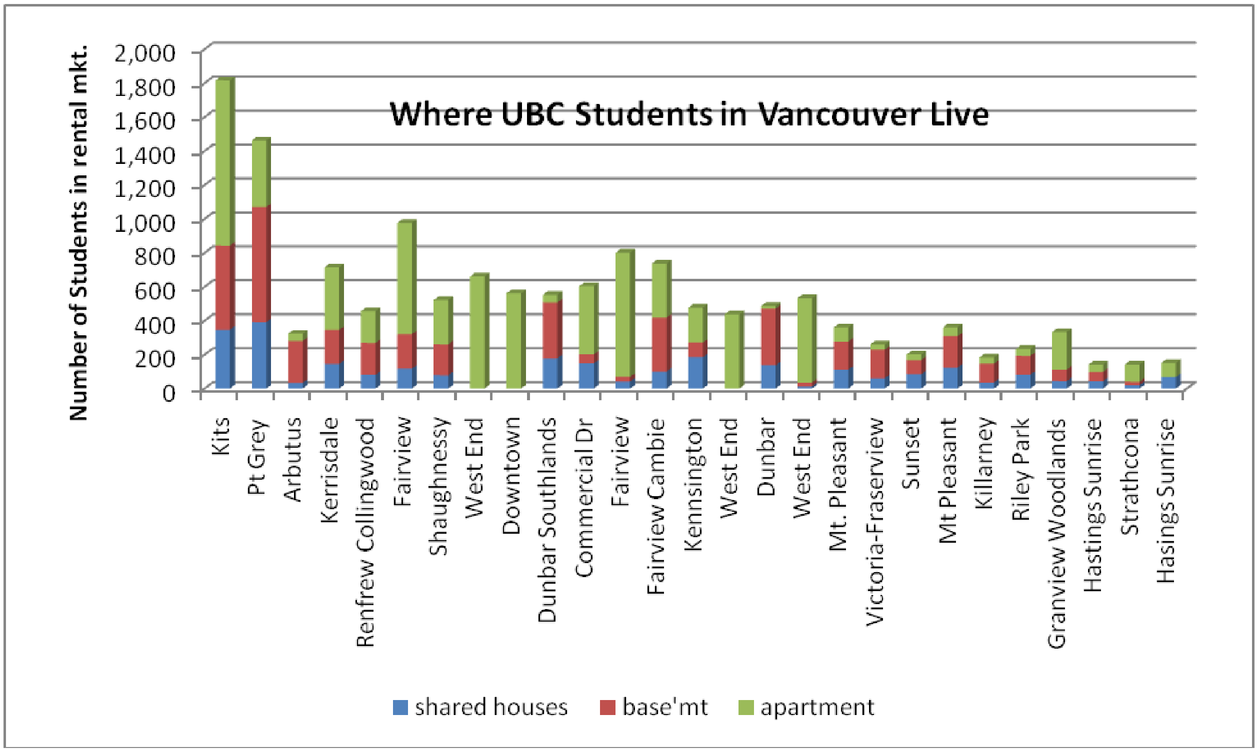
[22] Based on the feedback received through the student survey and the student focus group sessions, a large proportion of students living off campus reported that long commuting times affected their ability to engage fully in student life. Of those who reported that it takes them more than 40 minutes to get to campus, approximately two-thirds were also living at home.

Graph 1 shows the general distribution of students across different Vancouver neighbourhoods as well as the general profile of the housing stock. In looking at the general housing profile and distribution across key Vancouver neighbourhoods, it is clear that both the type and the location of the housing are important in terms of the choices available to UBC students.



Graph 1: Distribution of UBC Students by Neighbourhood and Housing Type

Table 7 shows the total number of rental units by postal code as reported in the 2006 Census compared with the estimated demand based on the feedback received through the web-based survey. As shown in Table 7, in some neighbourhoods student housing demand can account for as much as 15% to 25%[23] of the total market share.[24]

[23] This is true for the Kitsilano, Point Grey and Arbutus neighbourhoods.

[24] In the Dunbar area, the data suggests that student housing demand could account for as much as 43% of the available rental units.

Estimate of Student Market Share				
	Neighbourhood	Total Rental Universe Census	Student (Units)	Market Share %
V6K	Kits	7,335	1,076	**14.7%**
V6r	Pt Grey	3,405	866	**25.4%**
V6L	Arbutus	755	192	**25.4%**
V6P	Marpole	6,350	424	**6.7%**
V5R	Renfrew Collingwood	5,550	271	**4.9%**
V6J	Kits (2)	6,510	579	**8.9%**
V6M	Kerrisdale	2,850	309	**10.9%**
V6E	West End	11,640	391	**3.4%**
V6B	Downtown	5,575	333	**6.0%**
V6N	Dunbar Southlands	740	327	**n/a**
V5T	Mount Pleasant (2)	7,490	358	**4.8%**
V6H	Fairview	8,215	475	**5.8%**
V5Z	Fairview Cambie	4,480	437	**9.8%**
V5N	Kennsigton	6,665	283	**4.2%**
V6Z	West End	4,370	259	**5.9%**
V6S	Dunbar	665	288	**43.4%**
V6G	West End	13,130	316	**2.4%**
V5Y	Mt. Pleasant	2,150	214	**10.0%**
V5P	Victoria-Fraserview	3,320	154	**4.6%**
V5X	Sunset	3,340	120	**3.6%**
V5V	Mt Pleasant	3,225	214	**6.6%**
V5S	Killarney	3,575	109	**3.0%**
V5W	Riley Park	2,625	139	**5.3%**
V5L	Granview Woodlands	6,510	197	**3.0%**
V5M	Hastings Sunrise	2,520	84	**3.3%**
V6A	Strathcona	7,840	84	**1.1%**
V5K	Hasings Sunrise	2,685	90	**3.3%**
V6C	DTES	0	31	
V6T	UBC			
	Total	133,515	8,619	**10.9%**

Table 7: Estimate of Students by Postal Code

The Potential Loss of Vancouver Rental Units

The student housing demand forecast which was prepared also takes into consideration the potential considerations arising from increased competition from on-going population and household growth within the broader Vancouver market, as well as potential pressures arising from the loss of rental housing in key Vancouver neighbourhoods.

In looking at the rental housing data for the City of Vancouver, the findings suggest that, not only has there been limited new rental housing construction but there has also been a loss of stock in key neighbourhoods. The housing starts data publisher by CMHC shows that housing starts for the City of Vancouver have averaged approximately 560 new units per year. This is well below the estimated future demand for rental housing and will continue to lead to on-going supply pressures.

The loss of rental housing stock in key Vancouver neighbourhoods was also examined as part of this study. This included the loss of rented single detached housing stock in neighbourhoods such as Point Grey and Dunbar where there has been a significant level of growth and change including the redevelopment of older single detached homes, often with basement suites, into new, expensive detached homes without secondary suites.[25] This trend has significantly reduced an important source of student housing and is a "push factor" in terms of increased demand for on-campus housing.[26]

These types of pressures are reflected in the most recent Census data. In particular, an analysis of the 2006 Census data shows that there has been a net loss of approximately 1,220 rental housing units across the City of Vancouver between 2001 and 2006. The data also shows that between 1996 and 2006, 13 out of the 22 neighbourhoods across the City of Vancouver reported a net loss of rental housing units. Among the key Vancouver neighbourhoods analyzed for this study, there was a cumulative loss of 2,156 rental housing units identified. This represents a loss of approximately 4.7% of the total rental housing stock for these neighbourhoods or a loss of approximately one half of 1% (0.50%) per year.

[25] Shared houses are a popular form of housing for students. Based on the results of the off-campus student survey, approximately 1 in 5 students reported that they currently live in this form of housing.

[26] Sixty nine percent of those living in shared households reported that they were typically sharing with 2 or more other people. Therefore, for every single detached home which is lost from the rental supply, at least three students are displaced.

Affordability Considerations and Other Trade-Offs

As discussed at the outset of this report, housing choices frequently include trade-offs around different factors such as location, amenity, condition and affordability. In a conventional housing analysis, one of the central features is affordability, usually expressed as a percentage of household income relative to housing costs.

For students, housing affordability adds another layer of complexity in that many students have limited incomes and significant financial obligations including tuition payments, rent and basic living expenses. Furthermore, while many students are able to rely on assistance from parents and other sources, others are dependent on student loans and grants to help them make ends meet. This section examines some of the general affordability pressures identified by those who responded to the survey, as well as other types of changes that they would make if they could.

Table 8 shows the range of responses received from those living off campus regarding the types of changes that they would make to their housing situation if they could. Based on the responses received, 39% identified affordability as a concern while 38% reported that they would prefer to live closer to campus. Twenty-nine percent indicated that they would prefer to live in nicer housing while 27% indicated that they would like to live on campus. Approximately 22% indicated that they would like to have more independence while 20% reported that they would like to have more privacy.

Open-Ended Responses on Changes in Housing Situation	**% of Responses**
more affordable housing	39%
live closer to campus	38%
nicer place to live	29%
live on campus	27%
more independence	22%
more privacy	20%
more amenities	17%
different type of unit	16%
different neighbourhood	15%

Table 8 Based on the open ended responses to the student web-based survey (n=600-1200 responses)

Average Housing Costs

In terms of the general affordability of their housing, the feedback received through the web-based survey suggests that the average reported rent across those living off campus was $918 per month with a median rent of $800 per month. This is relatively comparable to the average reported rents for the Vancouver CMA which was equal to $982 per month as of April 2009.

The data in Table 9 also shows the average housing costs across the different housing types and living arrangements. As shown in Table 9, the average housing costs can vary across the different living arrangements. The data in Table 10 shows that sharing is frequently used by students as a means to help reduce their housing costs.

Housing Arrangements	No. of Responses	Average Rents
Shared house	319	$796.19
Garden or basement suite	516	$908.03
Apartment	714	$1,024.72
Couch surfing	3	$541.67
Student housing	18	$581.28
Social housing	11	$453.18
Other	25	$812.76
Total	1,675	$918.49

Table 9: Average Monthly Rent for Different Housing Types (n=1,675)

As shown in Table 10, 28% of all students reported that they live alone while 52% reported that they share with at least one other person. Among those living in a shared house, 42% reported that they share the rent with at least three other people.

	Living Alone	Share with 1 other	Share with 2 others	Share with 3 others	Share with 4 others	Share with 5+ others
Shared house	73	27	44	41	28	34
	30%	11%	18%	17%	11%	14%
Garden/bsmt suite	131	252	52	13	0	1
	29%	56%	12%	3%	0%	0%
Apartment	160	402	45	10	2	3
	26%	65%	7%	2%	0%	0%
Other	28	43	9	3	3	0
	31%	48%	10%	3%	3%	0%

Table 10: Type of Housing Arrangement by the Number of People Sharing (n=1,404)

Average Housing Cost by Neighbourhood

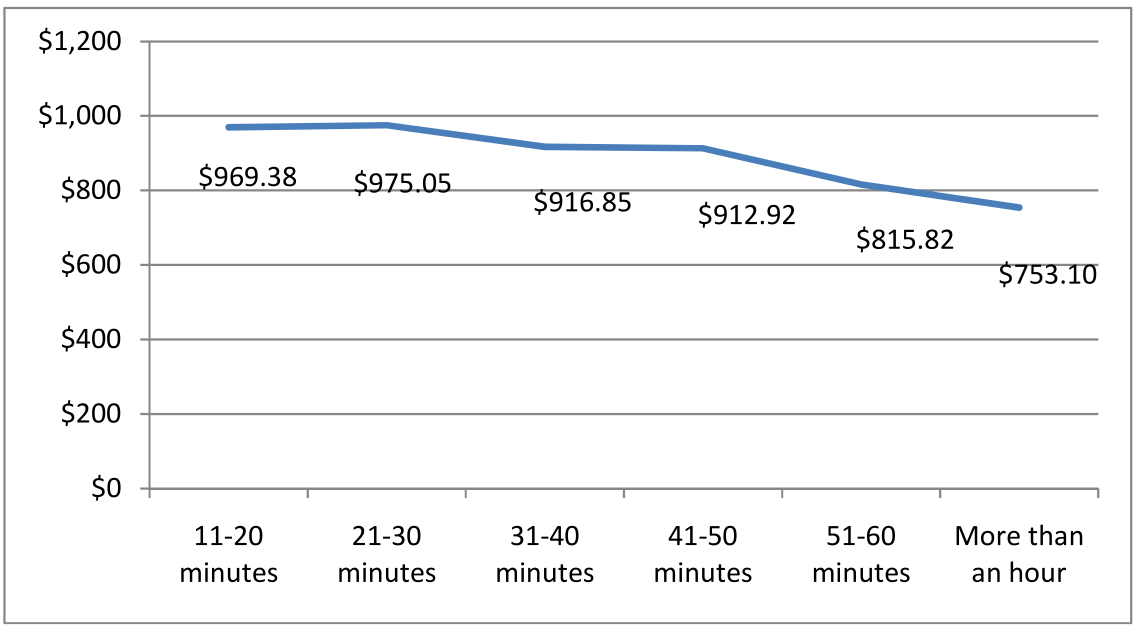
Table 11 shows the average rents by postal code as reported in the 2006 Census compared to the average rents by postal code as reported by those who responded to the web-based survey.

Postal Code	Neighbourhood	Number of Respondents Web Survey	Average Rent (2006 Census)	Average Rent (Student Web Survey)
V6K	Kits	178	$ 1,175	$ 965
V6R	Pt Grey	154	$ 1,304	$ 975
V6L	Arbutus	36	$ 1,570	$ 855
V6P	Marpole	63	$ 1,044	$ 907
V5R	Renfrew Collingwood	17	$ 829	$ 793
V6J	Kits (2)	69	$ 1,238	$ 1,112
V6M	Kerrisdale	58	$ 1,304	$ 955
V6E	West End	35	$ 1,049	$ 1,071
V6B	Downtown	18	$ 1,232	$ 1,195
V6N	Dunbar Southlands	60	$ 1,576	$ 931
V5T	Mount Pleasant (2)	57	$ 801	$ 802
V6H	Fairview	59	$ 1,105	$ 952
V5Z	Fairview Cambie	40	$ 1,214	$ 961
V5N	Kennsigton	46	$ 833	$ 800
V6Z	West End	19	$ 1,397	$ 1,218
V6S	Dunbar	62	$ 1,573	$ 860
V6G	West End	44	$ 1,083	$ 929
V5Y	Mt. Pleasant	26	$ 1,197	$ 1,042
V5P	Victoria-Fraserview	17	$ 846	$ 683
V5X	Sunset	11	$ 792	$ 713
V5V	Mt Pleasant	44	$ 849	$ 721
V5S	Killarney	12	$ 908	$ 781
V5W	Riley Park	23	$ 848	$ 859
V5L	Granview Woodlands	16	$ 761	$ 847
V5M	Hastings Sunrise	9	$ 821	$ 643
V6A	Strathcona	9	$ 684	$ 778
V5K	Hasings Sunrise	9	$ 931	$ 565
V6C	DTES	1	$ n/a	$ n/a
V6T	UBC	76	$ 1,208	$ 1,140
	Total student demand Vancouver			$ 918.00
	CMHC Rental Market Data			$ 982.00

Table 11: Average Rents by Postal Code, 2006 Census and results from student survey (n=1,268)

Average Housing Cost by Commuting Time

The feedback received through the web-based survey shows that housing costs are lower for those who live further away from campus. For example, the data on Graph 2 shows that the average rent for those who reported that they had a commute of between 11-20 minutes was $969 per month while those who reported a commute of one hour or more reported average rents of $753. Over an eight month period, the difference in the two rent levels can be significant representing a savings of over $1,700. The feedback received through the off-campus survey also shows that approximately 1 in 3 students living off campus reported that they have an average commute of 50 minutes or more. This includes those who are living at home as well as those who may be living further away from campus because of difficulties in finding suitable housing closer to campus or because of affordability considerations.



Graph 2: Rents by Length of Commute

Affordability Pressures

Among those who responded to the web-based survey, the high cost of housing and affordability concerns were identified by 38% of those living off campus as the one thing that they would change about their housing if they could. Table 12 shows the average reported rents for the Vancouver market area for different unit sizes based on the most recent rental market data published by CMHC (Fall 2008). The information reported in Table 12 includes the Vancouver CMA, the City of Vancouver, as well as local market data for the Kitsilano and Point

Grey neighbourhoods. The information in Table 12 is also reasonably aligned with the feedback received through the web-based survey in which students reported an average rent of $918 per month. Table 12 also provides the basic housing cost allowances specified by the Ministry of Advanced Education and Labour Market Development used by the Student Awards Office which includes $535 for a single student to between $821 and $1,070 per month for single parent families or couples with children.

# of bedrooms	Vancouver CMA	City of Vancouver	Kitsilano and Point Grey	Student Housing Awards Allowances
Bachelor	**$754**	**$779**	**$800**	**$535 (single student)**
1 bedroom	**$880**	**$936**	**$953**	
2 bedroom	**$1,124**	**$1,318**	**$1,365**	**$821 (single parent family) $1,070 (couple with children)**
3 bedroom	**$1,356**	**$1,749**	**$2,036**	
Total	**$937**	**$985**	**$1,012**	

Table 12: Average Monthly Rents, CMHC Rental Market Report (Autumn 2008)

It is evident that the housing allowance amounts are significantly below the rent levels paid by UBC students. If the Housing Awards Allowance rent levels were to be used as an indicator of student housing affordability or the affordability of attending UBC, it would seriously underestimate actual affordability pressures. Housing costs are a large part of student budgets and these allowances send unrealistically low suggestions to out of town applicants as to actual local market conditions, and may result in financial hardship for newly arrived UBC students. It is understandable to limit student debt loads by modeling typical budgets, however, these unrealistically low cost allowances do not match the current housing market. In the event the Ministry wishes to cap debt levels, they could consider doing so more directly rather than through the assumptions used in the model budget. The findings of this report suggest that consideration of revised allowances or an alternative housing supplement (grant) is warranted.

The Propensity of Students to Share Accommodation

Taking into account the different arrangements identified through the survey of students living off campus, it was determined that, on average, for each new student there is the need for 0.5923 units. This conversion factor is relevant because most housing and demographic data is expressed by household or dwelling unit and most university data is on a per student basis.[27]

Estimate of Student Housing Units by Postal Code			
		Conversion Factor	59.23%
	STUDENTS	Students	Units
V6K	Kits	1,816	1,076
V6R	Pt Grey	1,462	866
V6L	Arbutus	324	192
V6P	Marpole	715	424
V5R	Renfrew Collingwood	457	271
V6J	Kits (2)	977	579
V6M	Kerrisdale	522	309
V6E	West End	661	391
V6B	Downtown	562	333
V6N	Dunbar Southlands	552	327
V5T	Mount Pleasant (2)	605	358
V6H	Fairview	801	475
V5Z	Fairview Cambie	738	437
V5N	Kennsigton	477	283
V6Z	West End	438	259
V6S	Dunbar	487	288
V6G	West End	534	316
V5Y	Mt. Pleasant	361	214
V5P	Victoria-Fraserview	260	154
V5X	Sunset	202	120
V5V	Mt Pleasant	361	214
V5S	Killarney	183	109
V5W	Riley Park	234	139
V5L	Granview Woodlands	333	197
V5M	Hastings Sunrise	142	84
V6A	Strathcona	142	84
V5K	Hasings Sunrise	152	90
V6C	DTES	52	31
V6T	UBC	8650	
	Total student demand Vancouver	23,203	
	In Vancouver Market	14,553	8,619

Table 13: Estimate of Student Housing Units by Postal Code

27 The estimate of the propensity to share was derived through developing a weighted average of aggregate off-campus respondents indicating single occupancy or the number of roommates who shared.

On-Campus Housing Choices

UBC currently maintains an inventory of 8,680 beds for students living on campus, for an estimated on-campus population of 11,000 students and student family members. The housing that is provided through UBC includes a mix of different housing types and living arrangements including single rooms, shared living arrangements and family housing.

As the university has continued to expand the range of housing types and service options available, it is clear that this housing has generated a wider level of interest and appeal beyond the traditional under-graduate housing choices. This final section looks at the feedback received from the 2,401 students who responded to the web-based survey[28] including their general satisfaction with the different aspects of their housing situation and the factors which influenced their decision to live on campus.

Based on the feedback received, 89% of those living on campus reported that they were satisfied or very satisfied with their housing situation. In addition, 38% reported that access to residence played a role in shaping their decision to attend UBC.

When asked about the different aspects of campus life that were important to them:

- 91% found the quality of student housing as satisfactory to very good;
- 81% viewed the academic benefits of living on campus as important or very important;
- 76% said the social benefits and a close connection to the larger university experience were a strong reason to live on campus; and,
- 74% said that more shops and services would improve the quality of the on-campus living experience.

A number of students also identified the desire for more shops, services or social amenities on campus with 46% reporting that they frequently leave campus for groceries and supplies.

Table 14 provides additional details on the different aspects of on-campus housing that respondents identified as being most important to them. This included factors related to convenience, access to services and amenities, as well as the ability to engage in student life.

[28] A response rate of 2,401 represents approximately 28% of all students currently living on campus based on an estimated inventory of 8,680 on-campus housing spaces. A sample of this size provides a high degree of confidence in the reliability of the findings.

Importance of Aspects of Living On-Campus	**% of Responses**
not having to commute	91%
convenience of on-campus living	89%
access to the library, study spaces and other academic supports	81%
freedom from the hassles of renting	76%
sense of engagement and connectedness with the university	76%
social opportunities	76%
sense of community and engagement with external environment	75%
housing affordability	70%
sense of independence	62%
access to cultural and recreational activities	61%
quality of housing	60%
access to services and amenities	49%
access to a meal plan and other services	39%
access to childcare	11%

Table 14: Important Aspects of Living On Campus from student web-based survey (n=2,231)

As a broad observation to emerge from the above data, it can be stated that the importance that students place on living on campus as part of the broader academic and student experience suggests that there exists a significant pull for on-campus housing.

Student Housing Demand Forecast under the Two Scenarios

In preparing the student housing demand forecast, the following scenarios were considered:

Scenario 1

The first scenario held student enrolment constant at 2008 levels (n=30,560 students) and included an assessment of the impact of the following external market pressures:

a. Constraints on the number of new rental housing units being added in the broader Vancouver market;
b. A decline in the available supply of rental units in key Vancouver neighbourhoods including rented single detached homes, rented secondary suites, and garden and basement suites;
c. The potential impact of on-going growth pressure and increased competition from non-student households moving to the City of Vancouver and the Metro Vancouver region; and,
d. The potential effects of on-going price increases and affordability pressures in the private rental market.

The results of the analysis are shown in Table 15:

Student Housing Demand Forecast Scenario #1	**5 years (to 2013)**	**10 years (to 2018)**	**15 years (to 2023)**	**20 years (to 2028)**	**Total**
Decline in available supply relative to student housing units in the Vancouver Rental Market	7.7%	8.0%	8.2%	8.5%	32.5%
Full-Time Students	30,560	30,560	30,560	30,560	30,560
Growth Pressure: Demand Increase + Supply Decrease (UNITS)	727	750	774	801	3,052 units
Growth Pressure: Demand Increase + Supply Decrease (STUDENTS)	1,227	1,266	1,307	1,352	5,152 beds
Decline in available supply relative to student housing units in the Vancouver Rental Market	7.7%	8.0%	8.2%	8.5%	32.5%
Full-Time Students	30,560	30,560	30,560	30,560	30,560
Students Housed on Campus	9,877	11,143	12,451	13,803	13,803
% of Full-Time Students Housed on Campus	32.3%	36.5%	40.7%	45.2%	45.2%

Table 15: Estimated On-Campus Housing Demand (Holding Enrolment Constant)

Under this scenario, even without an increase in student enrolment, the university would have to add 5,152 spaces or approximately 3,052 additional units of on-campus housing just to maintain the current availability of student housing within the broader rental housing market.

Scenario 2

The second scenario modeled maintained all of the assumptions of the first scenario but assumed that there would be an increase in student enrolment by approximately 9% or an additional 2,800 new students over the 20 year time frame.

Student Housing Demand Forecast Scenario #2	5 years (to 2013)	10 years (to 2018)	15 years (to 2023)	20 years (to 2028)	Total
Full-Time Students	30,560	33,362	33.362	33,362	33,362
Students Housed on Campus	10,554	12,385	13,692	15,044	15,044
Growth Pressure: Demand Increase + Supply Decrease (UNITS)	1,128	1,084	774	801	3,787 units
Growth Pressure: Demand Increase + Supply Decrease (STUDENTS)	1,904	1,803	1,307	1,352	6,366 beds
Decline in available supply relative to student housing units in the Vancouver Rental Market	12.0%	11.5%	8.2%	8.5%	39.2%
% of Full-Time Students Housed on Campus	33.0%	37.1%	41.0%	45.1%	45.1%

Table 16: Estimated On-Campus Housing Demand (increase of 2,800 students-9% growth)

Under this scenario, UBC would have to add 6,366 spaces or approximately 3,787 new on-campus housing units just to maintain the current availability of student housing within the broader rental housing market.

Conclusions

In looking at the feedback received from students living on campus, it appears that many of the factors identified could be described as “pull factors” or factors which draw students toward the different housing options offered on campus. The feedback provided also suggests that, for many living on campus, their housing has provided them with the ability to more fully engage in student life.

The study findings also suggest that the demand for on-campus housing can be influenced by a variety of “push-related” and “pull-related” factors including diminished choice within the broader rental housing market. This can be the result of increased competition for available units and can result in a situation where there is even greater demand for on-campus housing.

The on-campus housing demand forecast set out in this report examined the inter-relationship between on- and off-campus housing choices. It also looked at the different choices and trade-offs that students make including trade-offs between independence, privacy, suitability and affordability. Changes in the broader rental housing market, both in terms of supply- and demand-related pressures can also influence the outcome.

Different scenarios modeled in this report took into consideration the likely outcomes under a modest growth scenario as well as under a scenario of “no growth”. Under both scenarios, modest growth of the student population; and a cap on growth, it was concluded that, because of larger housing market forces (supply-related and demand-related), there will continue to be significant pressure for an expansion of on-campus student housing. In particular, it is estimated that there will be the need for between 5,152 and 6,366 new student spaces just to maintain the current availability of student housing.

In putting forward these estimates, the analysis is intended to help to provide important data for informing UBC’s planning activities and for guiding and informing future planning decisions. At the same time, it is important to recognize that the timing of the construction of the units as well as decisions around establishing targets for the proportion of on-campus student housing are decisions which should be evaluated within the broader context of UBC’s strategic goals and objectives.