

Student Housing Trends 2017-2018 Academic Year

Boston's world-renowned colleges and universities provide our City and region with unparalleled cultural resources, a thriving economic engine, and a talented workforce at the forefront of global innovation. However, the more than 147,000 students enrolled in Boston-based undergraduate and graduate degree programs place enormous strain on the city's residential housing market, contributing to higher rents and housing costs for Boston's workforce. In *Housing a Changing City: Boston 2030*, the Walsh Administration outlined three clear strategic goals regarding student housing:

1. Create 18,500 new student dormitory beds by the end of 2030;¹
2. Reduce the number of undergraduates living off-campus in Boston by 50%;²
3. Ensure 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 the effect these students are having on Boston's local housing market. This report is based on data from the University Accountability Reports (UAR) submitted by Boston-based institutions of higher education.³

In this edition of *Student Housing Trends*,⁴ data improvements have led to more precise enrollment and off-campus data, allowing the City to better distinguish between students that are or are not having an impact on the private housing market. The key findings are:

- Overall enrollment at Boston-based colleges and universities is 147,689. This represents net growth of just under 4,000 (2.8%) students since 2013, and a 2,300+ (1.6%) student increase over last year.
- The growth in graduate student enrollment is outpacing undergraduate enrollment. Since 2013, graduate student enrollment has grown by 7.7%, while the growth for undergraduates has remained flat.
- Since 2013, the number of undergraduate students housed on-campus has increased by slightly more than 1,600 students, an increase of 3.9%, outpacing enrollment growth in this category.
- Sixty percent of all full-time undergraduates are housed on-campus.
- Almost 36,500 students are living in private housing in Boston, but it is notable that the number has decreased by 624 students, as compared to Fall 2016.
- Since 2011, the City has issued permits for 6,504 dorm beds, or an average of 929 beds per year.
- 4,241 undergraduate dorm beds were built from 2011-2017, including 647 in 2017.
- There are approximately 6,000 additional dorm beds planned or in construction, which will result in nearly 10,250 total beds toward the 18,500 dorm bed goal.

Challenges remain despite significant progress. Nearly 16,700 students occupy units in single-, 2-family, or 3-family homes and condominiums in Boston's private housing market -- housing stock that has traditionally served Boston's families. Every unit rented to students shrinks the pool of housing available to Boston's workforce and increases the pressure on the supply of unsubsidized affordable middle-income housing.

¹ The City aims to create 16,000 of the 18,500 dorm beds for undergraduates and 2,500 for graduates.

² In *Housing a Changing City: Boston 2030*, the gross off-campus count was reported as 20,600. This has been revised to 24,552 after data revisions, and the addition of six colleges or universities to the original 2013 dataset.

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 where they are living (on-campus or off-campus).

⁴ This is the second edition of the 2017 Student Housing Report. A significant correction in data was made at the request of a reporting institution.

Enrollment Trends

The baseline data for this student housing report was established in *Housing a Changing City: Boston 2030*, using data from the Fall semester 2013. Since 2013, overall enrollment has been trending upward at Boston's institutions of higher education, peaking in 2017 at 150,635 students.

Table 1 (page 3) provides a breakout of the total enrollment figures for each school.⁵ Since 2013, total enrollment has increased by close to 4,000 students (2.8%), for a total of 147,689 students in 2017. This is an annual rate of 0.56%, which is less than the 1.3% annual rate of growth seen from 1995-2010.⁶ This enrollment increase is comprised of graduate students, a cohort that has grown by nearly 4,000 (7.7%) since 2013, while the number of undergraduate students has remained flat. (**Appendix Table B1**).

The net growth in aggregate enrollment from 2013-2017 can be attributed to increased enrollment at Northeastern University (NEU). NEU grew by 4,101 students (15.5%), 3,200 (78%) of whom were graduate students. Simmons College also saw significant enrollment growth, with 1,645 (35.3%) total students added since 2013. The most significant decrease occurred at Suffolk University, which saw an enrollment decline of just more than 1,600 students (-19%), essentially canceling out the growth at Simmons.

Between 2016 and 2017, enrollment increased by nearly 2,400 students (1.6%), representing the largest year-over-year increase since 2013. Following the five-year trend, the largest increases between 2016-2017 occurred at NEU (1,976) and Simmons (1,933), while Suffolk University saw a decrease of 546 students. For additional details on enrollment, please see **Appendix B**.

Graduate enrollment growth has been outpacing undergraduate growth since at least 1995, and on-campus graduate housing remains in short supply.⁷ It should be noted that because graduate students are often working adults, fewer of them are entering the private housing market exclusively to study, unlike the undergraduate student population. This means that growth in graduate enrollment has less impact on the private housing market than a corresponding growth in undergraduate enrollment. Further discussion on housing demand can be found in the **New On-Campus Housing** section of this report.

⁵ Enrollment figures presented in this report exclude students enrolled in distance learning (online programs) and satellite campuses outside of Boston's borders. In general, students in evening/part-time/professional programs are also excluded.

⁶ Refer to *Boston 2030*, total percentage growth from 1995-2010 was 21% (21%/16 years = 1.3% annual rate).

⁷ See *Boston 2030*, pg. 75-76.

Table 1: Total Enrollment Change by School, 2013-2017⁸

Institution Name	Total Enrollment Counts					Difference 2013-2017		Difference 2016-2017	
	Total 2013	Total 2014	Total 2015	Total 2016	Total 2017	Count	%	Count	%
Bay State College	1,194	1,090	903	653	560	-538	-49%	-93	-14.2%
Benjamin Franklin Institute	463	485	460	492	540	77	16.6%	48	9.8%
Berklee College of Music	4,519	4,710	4,474	4,509	4,493	-26	-6%	-16	-0.4%
Boston Architectural College	725	757	695	675	656	-69	-9.5%	-19	-2.8%
Boston Baptist College	96	97	92	77	99	3	3.1%	22	28.6%
Boston College	13,525	13,575	13,694	13,851	13,996	471	3.5%	145	1.0%
Boston Conservatory	774	730	801	797	872	98	3.0%	75	9.4%
Boston University	27,508	26,925	27,577	27,890	27,861	173	.6%	-209	-0.7%
Emerson College	4,523	4,535	4,475	4,450	4,494	-29	-6%	44	1.0%
Emmanuel College	2,320	2,199	2,092	2,104	2,011	-309	-13.3%	-93	-4.4%
Fisher College	978	921	1,005	1,005	993	15	1.5%	-12	-1.2%
Harvard University	3,830	3,966	4,019	4,072	3,924	94	2.5%	-148	-3.6%
MA College of Art & Design	1,910	1,710	1,760	1,785	1,866	-44	-2.3%	81	4.5%
MA College of Pharmacy & Health Sciences	4,469	4,650	4,622	4,467	4,452	-17	0.4%	-15	-0.3%
MA Institute of Technology	11,301	11,319	11,359	11,395	11,434	133	1.2%	39	0.3%
MGH Inst. of Health Professions	1,302	1,426	1,418	1,561	1,581	279	21.4%	20	1.3%
NE College of Optometry	502	519	511	533	528	26	5.2%	-5	-0.9%
New England Conservatory	812	641	789	819	844	32	3.9%	25	3.1%
New England Law Boston	964	869	681	622	560	-404	-41.96%	-62	-10.0%
Northeastern University	29,755	30,763	31,981	32,817	30,538	4,101	15.5%	1,976	6.9%
School of Museum of Fine Arts	651	510	499	328	293	-358	-55.0%	-35	-10.7%
SHOWA Institute	263	258	270	229	222	-41	-15.6%	-7	-3.1%
Simmons College	4,655	3,996	4,316	4,367	6,300	1,645	35.3%	1,933	44.3%
St John Seminary	N/A	165	209	193	191	-1	-0.5%	-2	-1.0%
Suffolk University	8,437	8,155	7,800	7,378	6,832	-1,605	-19.0%	-546	-7.4%
Tufts Univ. (Health Sciences)	2,632	2,778	2,786	2,834	2,790	158	6.0%	-44	-1.6%
University of MA-Boston	12,804	13,176	13,540	13,390	12,964	160	1.2%	-426	-3.2%
Urban College of Boston	767	811	853	815	755	-12	1.6%	-60	-7.4%
Wentworth Institute	3,952	4,485	4,576	4,414	4,409	457	11.6%	-5	-0.1%
Wheelock College	1,323	1,319	1,173	1,053	811	-512	-38.7%	-242	-23.0%
TOTAL ENROLLMENT	143,732	143,932	145,606	145,320	147,689	3,957	2.8%	2,369	1.6%

⁸ Total enrollment figures include both full-time and part-time students. The Northeastern enrollment numbers from 2013-2016 have been revised because the previous reporting included online students.

Student Housing: On-Campus vs. Off-Campus

Of the 147,689 total students enrolled in Boston's institutions of higher education for Fall 2017, just over 50,000 or 1:3 are housed on-campus or in university-provided housing (44,189 undergraduates and 6,077 graduates, **Figure 1**). More than 97,000 (66%) students reside off-campus. Approximately 65,500 or two-thirds of off-campus students reside in private housing (**Table 2**), of which 50.7% are undergraduates and 49.3% are graduate students. The almost 32,000 (33%) students living off-campus that remain reside at home or are enrolled in a study abroad or co-op program, and therefore are not believed to have an impact on the private housing market (see **Table 2**).

Figure 1: Students by Housing Category and Degree Level in Greater Boston, 2017⁹

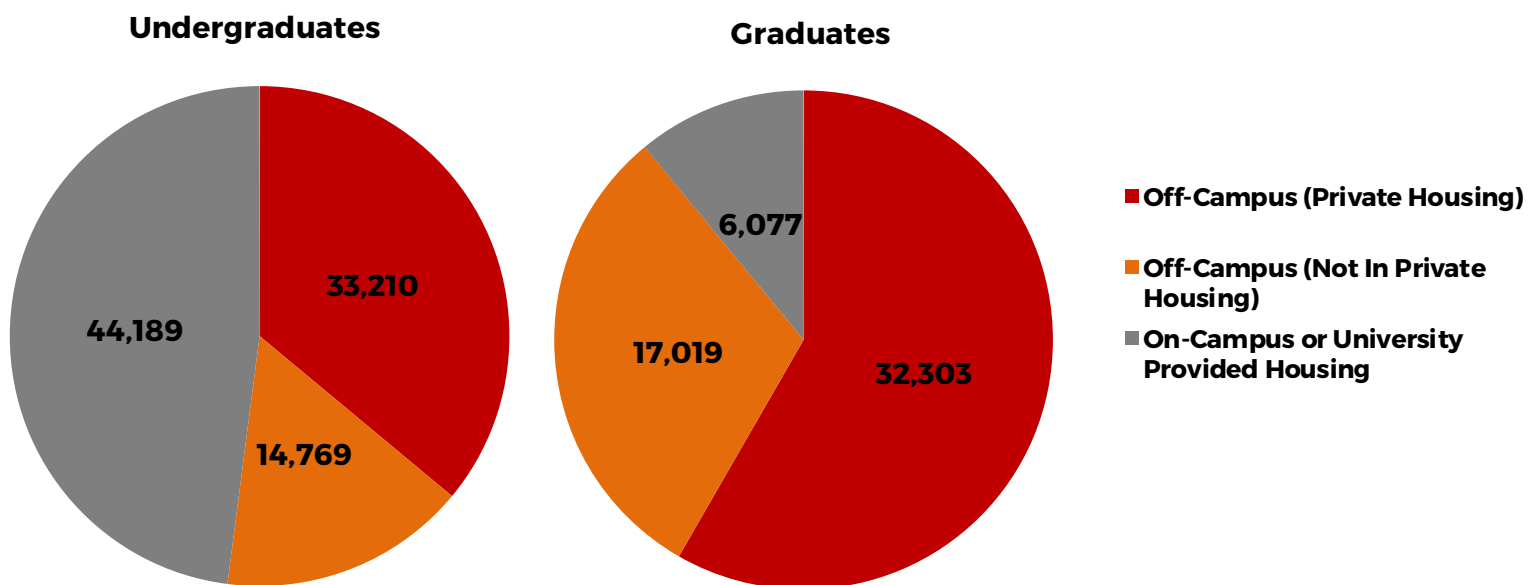


Table 2: Students by Housing Category and Degree Level in Greater Boston, 2017

Living Arrangement	Undergraduates	Graduates	Total	% of Grand Total
On-Campus or in University Provided Housing	44,189	6,077	50,266	34.0%
Off-Campus (Not in Private Housing)	14,769	17,019	31,788	21.5%
Off-Campus (In Private Housing)	33,210	32,303	65,513	44.4%
Not Categorized	43	79	122	0.1%
TOTAL	92,211	55,478	147,689	100.0%

⁹ Excludes uncategorized students, who are included in Table 2.

The majority of students residing in "On-Campus and Off-Campus in University-Managed Housing" live on-campus in property owned by the school, while a small portion resides off-campus in housing managed by the school (see [Table 2](#)). Students in this category have no impact on the private housing market.

The "Off-Campus (Private Housing)" category refers to students who entered the private housing market while attending a Boston-based college or university. For undergraduates, this usually means that the student does not live with a parent or guardian or in a housing facility managed or owned by their respective institution of higher learning. Students in this category have a major impact on the private housing market, as they are directly competing with working families and other residents for housing.

The "Off-Campus (Not in Private Housing)" category refers to students who remained living at home. For undergraduates, this typically refers to students who live with their parents or guardians; graduate students may already be housed in the private market at the time that they choose to undertake post-graduate studies. Students studying abroad or completing co-op programs outside of Boston have also been counted in this category. Students in this category have no impact on the private housing market.

[Table 3](#) provides a breakout of the number of full-time undergraduate students housed on-and off-campus in Greater Boston (including those living off-campus in communities outside of Boston). Overall, 60.2% of full-time undergraduates are housed on-campus by their institutions, up from 58.5% last year. Among the schools with large (5,000 or more) full-time undergraduate student populations, Boston College (BC) and Boston University (BU) house 85.4% and 74.3% of their full-time undergraduate students, while NEU and Suffolk only house 57% and 39.1% respectively. UMB currently does not provide university housing for any of its approximately 8,300 full-time undergraduate students, but they do have dorms in production (see the [New On-Campus Housing](#) section).

Among schools whose enrollments are between 1,000-5,000 full-time undergraduate students, the Massachusetts Institute of Technology (MIT), Emmanuel College, and Emerson College house 93.5%, 89.5%, and 83% of their students respectively. Berklee College of Music, on the other hand, houses 31.3%.



Table 3: Percentage of Full-Time Undergraduates Housed by School (Greater Boston), 2017¹⁰

Institution	Enrolled Full-Time Undergrads	Students Provided Housing by School		Students Not in Need of Housing		Students in Need of Housing	
		In University Housing	In University Managed Housing	Off Campus Living at Home	Study Abroad	Off Campus Not at Home	% Students Provided Housing by School
Bay State College	374	61	0	229	0	84	42.1%
Benjamin Franklin Institute	468	22	0	423	0	23	48.9%
Berklee College of Music	3,968	1,169	0	105	131	2,578	31.3%
Boston Architectural College	195	4	0	21	0	170	2.3%
Boston Baptist College	59	26	22	11	0	0	100.0%
Boston College	9,358	7,582	0	225	254	1,297	85.4%
Boston Conservatory	605	220	0	0	3	383	36.5%
Boston University	16,571	11,418	0	764	434	3,955	74.3%
Emerson College	3,788	1,889	105	1,385	0	405	83.0%
Emmanuel College	1,840	1,051	187	429	28	145	89.5%
Fisher College	744	321	0	169	1	299	55.9%
Harvard University**	0	0	0	0	0	0	N/A
MA College of Art & Design	1,662	715	464	0	5	487	71.2%
MA College of Pharmacy & Health Sciences	2,579	682	2	191	0	1,704	28.6%
MA Institute of Technology	4,510	3,839	366	11	4	286	93.5%
MGH Institute of Health Professions*	196	0	0	196	0	188	0.0%
NE College of Optometry	0	0	0	523	5	0	N/A
NE Conservatory of Music	407	221	0	186	0	0	100.0%
New England Law Boston	0	0	0	0	0	0	N/A
Northeastern University	18,645	8,112	485	1,568	2,006	6,474	57.0%
School of Museum of Fine Arts	209	99	0	24	2	84	54.1%
SHOWA Institute	222	222	0	0	0	0	100.0%
Simmons College	1,558	1,100	0	16	0	442	71.3%
St John Seminary	26	18	0	0	0	8	69.2%
Suffolk University	4,792	1,254	0	1,561	27	1,950	39.1%
Tufts University (Health Sciences)**	0	0	0	0	0	0	N/A
University of MA-Boston*	8,314	0	0	0	0	8,314	0.0%
Urban College of Boston	67	0	0	67	0	0	N/A
Wentworth Institute	3,876	2,080	0	1,152	0	644	76.4%
Wheelock College	593	353	0	185	3	52	87.2%
Total	85,626	42,458	1,631	9,441	2,903	29,784	60.2%
PART-TIMERS (ALL SCHOOLS)	6,056	63	37	2,400	25	3,426	-
GRAND TOTAL	91,682	42,521	1,668	11,841	2,928	33,210	-

¹⁰ Table 3 calculates the percentage of students housed for the entire enrolled undergraduate (full-time) population, not just Boston. Part-time students are excluded from the calculation as these students generally do not seek housing provided by schools. Data provided by UMB and MGH Institute of Health Professionals did not distinguish between students residing off-campus at-home and off-campus not-at-home and are identified by an asterisk. The students at MGH are categorically treated as off-campus not-at-home given the age of its students and purpose of their undergraduate degree. The students at UMB are categorized as off-campus not-at-home. Neither UMB nor MGH currently have on-campus housing. Schools with ** reflect Boston-based programs only.



Students Living Off-Campus within the City of Boston

The student population residing in Boston includes more than 38,000 (46%) students residing on-campus or in university provided housing and nearly 45,000 (54%) students living off-campus. The population residing on-campus or in university-managed housing is primarily composed of undergraduate students (35,431 or 92%), while the gross off-campus population is more evenly split between undergraduates (23,971 or 53%) and graduates (20,959 or 47%).

As of this report, there are 20,578 undergraduate students living in units in the private housing market in Boston. In addition, there are nearly 16,000 graduate students also living off-campus in private housing, bringing the total to 36,451 students exerting pressure on Boston's private housing market.

Figure 2: Students by General Housing Categories and Degree Level in Boston, 2017¹¹

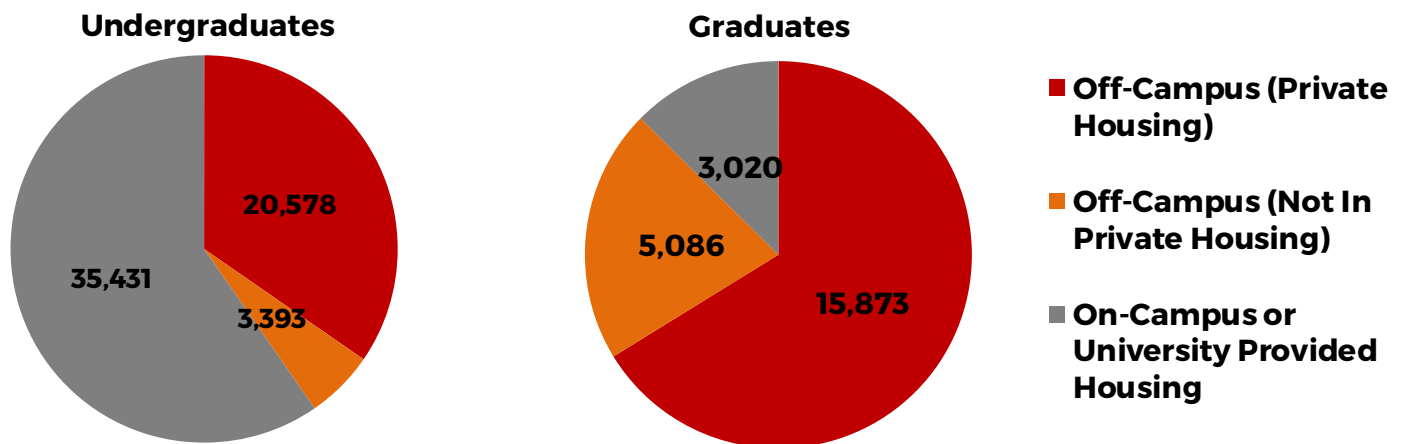


Table 4: Students by Housing Type and Degree Level in Boston, 2017

Living Arrangement	Undergraduates	Graduates	Total	% of Grand Total
On-Campus or University Provided Housing	35,431	3,020	38,451	46.1%
Off-Campus Not in Private Housing	3,393	5,086	8,479	10.2%
Off-Campus Private Housing	20,578	15,873	36,451	43.7%
TOTAL	59,402	23,979	83,381	100.0%

Table 5 (page 8) shows the number of undergraduates reported by each school to be living in Boston's private housing market for 2016 and 2017. There is an estimated net decrease of 256 (-1%) undergraduates in the private housing market. The decrease in students off campus is led by BU and UMB, which saw decreases of 150 and 114 students in the private-market respectively. Northeastern University, on the other hand, saw the greatest increase of students in the private housing market at 188 (3%).

11 Excludes uncategorized students, which are shown in Table 2.

Table 5: Undergraduate Students in the Boston Private Housing Market by School, 2017¹²

Institution	2016	2017	Change: 2016 to 2017	% Change: 2016 to 2017
Bay State College	85	64	-21	16%
Benjamin Franklin Institute	113	7	-106	-94%
Berklee College of Music	2,727	2,704	-23	-1%
Boston Architectural College	56	43	-13	-23%
Boston Baptist College	0	0	0	N/A
Boston College	1,066	1,057	-9	-1%
Boston Conservatory	362	360	-2	-1%
Boston University	2,926	2,776	-150	-5%
Emerson College	240	298	58	24%
Emmanuel College	128	103	-25	-20%
Fisher College	87	120	33	38%
Harvard University	0	0	0	N/A
MA College of Art & Design	294	250	-44	-15%
MA College of Pharmacy & Health Sciences	858	923	65	8%
MA Institute of Technology	73	65	-8	-11%
MGH Institute of Health Professions	0	0	0	N/A
NE College of Optometry	0	0	0	N/A
NE Conservatory of Music	0	0	0	N/A
New England Law Boston	0	0	0	N/A
Northeastern University*	5,409	5,597	188	3%
School of Museum of Fine Arts	66	56	-10	-15%
SHOWA Institute	0	0	0	N/A
Simmons College	116	149	33	28%
St John Seminary	0	8	8	N/A
Suffolk University	1,543	1,509	-34	-2%
Tufts University (Health Sciences)	0	0	0	N/A
University of MA-Boston**	4,113	3,999	-114	-3%
Urban College of Boston	0	0	0	N/A
Wentworth Institute	543	480	-63	-12%
Wheelock College	29	10	-19	-66%
TOTAL	20,578	21,057	-256	-1%

¹² Table 5 includes both full-time and part-time students. The Northeastern 2016 private housing count is an estimate given data incompatibility issues. UMass Boston reflects gross off-campus count since they did not distinguish between students residing off-campus (living-at-home) and off-campus (not-at-home.)

Table 6 shows the number of graduate students in the Boston private housing market by school for 2016 and 2017. Unlike the undergraduate off-campus population, the graduate student population living in private housing is trending down - with a 2% decrease since last year. The decrease is spread throughout various schools, including NEU, which saw the biggest decrease at 238 (-4%).

Table 6: Graduate Students in the Boston Private Housing Market by School, 2017¹³

Institution	2016	2017	Change: 2016 to 2017	% Change: 2016 to 2017
Bay State College	0	0	0	N/A
Benjamin Franklin Institute	0	0	0	N/A
Berklee College of Music	11	18	7	64%
Boston Architectural College	65	52	-13	-20%
Boston Baptist College	0	0	0	N/A
Boston College	882	894	12	1%
Boston Conservatory	151	179	28	19%
Boston University	4,092	4,040	-52	-1%
Emerson College	139	113	-26	-19%
Emmanuel College	0	0	0	N/A
Fisher College	0	4	4	N/A
Harvard University	482	509	27	N/A
MA College of Art & Design	45	33	-12	-27%
MA College of Pharmacy & Health Sciences	811	969	158	19%
MA Institute of Technology	469	497	28	6%
MGH Institute of Health Professions	0	0	0	N/A
NE College of Optometry	0	0	0	N/A
NE Conservatory of Music	0	0	0	N/A
New England Law Boston	0	0	0	N/A
Northeastern University	5,376	5,138	-238	-4%
School of Museum of Fine Arts	54	45	-9	-17%
SHOWA Institute	0	0	0	N/A
Simmons College	466	475	9	2%
St John Seminary	0	27	27	N/A
Suffolk University	468	406	-62	-13%
Tufts University (Health Sciences)	1,664	1,512	-152	-9%
University of MA-Boston*	1,011	928	-83	-8%
Urban College of Boston	0	0	0	N/A
Wentworth Institute	30	34	4	13%
Wheelock College	25	0	-25	-100%
TOTAL	16,241	15,873	-368	-2%

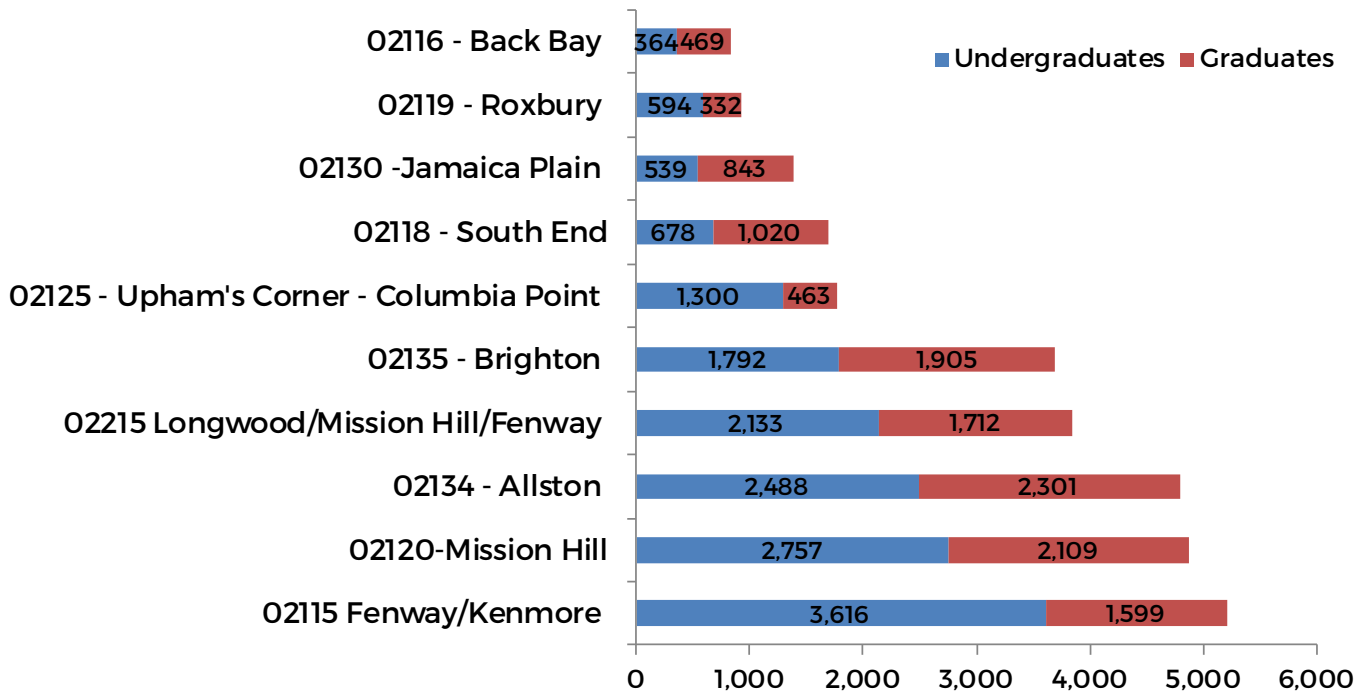
¹³ Table 6 includes both full-time and part-time students. UMB shows gross off-campus population only (not off-campus not-at-home) given that they did not distinguish between off-campus sub-groups. MGH Institute of Health Professionals, New England College of Optometry, New England Conservatory of Music, 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.

Off-Campus Students Housing by Neighborhood

Figure 3 shows the geographic distribution of undergraduate and graduate students by neighborhood, using zip codes as a proxy for neighborhoods.¹⁴ Using zip codes for this analysis allows us to hone in on some of the smaller neighborhood areas of particular concern, such as Mission Hill and Uphams Corner/Columbia Point. At this time, we are not able to show trends in the distribution of students by neighborhood over time as a result of inconsistencies in data reporting from previous years.

The zip codes with the greatest number of students are 02115 (Fenway/Kenmore), 02120 (Mission Hill), 02134 (Allston), 02215 (Longwood/Mission Hill/Fenway), and 02135 (Brighton). Collectively, these zip codes represent 63% of the students living in Boston's private housing market. The remaining top ten zip codes where students live account for 19% of all student addresses and include: 02125 (Upham's Corner, Columbia Point), 02118 (South End), 02130 (Jamaica Plain), 02119 (Roxbury), and 02116 (Back Bay). The remaining 18% are scattered across many other zip codes (see Appendix D).

Figure 3: Top Ten Locations of Off-Campus (Private Housing Market) Students by Zip Code in 2017



¹⁴ Based on geocoded Off-Campus addresses obtained from Fall 2016 University Accountability Reports. While these are mostly students in the private housing market, totals may include addresses for students living at home, or in a university-managed facility. These figures include both full-time and part-time students.

Off-Campus Students Housing by Property Type

This section focuses on the property types in which students (undergraduates and graduates) reside. Nearly half of Boston's off-campus students (16,685) live in private housing properties of three units or fewer or condominiums. These students place particular pressure on Boston's workforce housing market, as Boston's triple-deckers and other one-, two- and three-family properties were originally built for Boston's workforce, while most condominiums were generally intended to be owner-occupied housing. In some cases, students are living in condominium units purchased by parents as an investment to provide housing while their children are in school, which will later be sold when the student graduates. Other condominium units are rented at a profit to students by investor-owners.

Table 7: Students Living Off-Campus by Housing Type¹⁵

	Property Type	2017 Student Count	% of Addresses
Undergraduates	3 units or less (excluding condos)	6,441	32%
	Students in Condos	3,584	18%
	Students living in Apartments (4 units or more)	5,105	25%
	Students in Multi-Use Properties	3,608	18%
	Other Properties	1,384	7%
Graduates	3 units or less (excluding condos)	3,508	23%
	Students in Condos	3,152	21%
	Students living in Apartments (4 units or more)	4,743	31%
	Students in Multi-Use Properties	2,683	18%
	Other Properties	1,065	7%
All Students	3 units or less (excluding condos)	9,949	28%
	Students in Condos	6,736	19%
	Students living in Apartments (4 units or more)	9,848	28%
	Students in Multi-Use Properties	6,291	18%
	Other Properties	2,449	7%

¹⁵ Based on geocoded Off-Campus addresses obtained from Fall 2017 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 condominium exists, irrespective of whether the condominium is located in a house or apartment building. For example, condos in a three-unit building are reported as condominiums, not as a 3-family. Apartments are buildings with 4+ units (codes 111-114). Multi-Use properties are buildings with multiple uses such as residential, commercial, condominium, or office (code 10-31). These figures include both full-time and part-time students.

New On-Campus Housing

To meet the goal of creating 18,500 new dorm beds (16,000 for undergraduates and 2,500 for graduates) by the end of 2030, the City needs to permit beds at an average pace of 768 beds per year from 2018-2030. Since 2011, an average of 929 beds has been permitted annually, exceeding the pace needing to reach 18,500 beds by 2030.

Fifty-three percent of the dorm bed goal is met by taking into account dorm beds built completed 2011 (4,241), beds currently or soon to be under construction (2,886), and future commitments (2,723) in the pipeline (Table 8).¹⁶ After considering dorm bed demolitions, the net built and planned production is just over 8,500 (46% of the goal).

Table 8: Current Progress on Goal of Producing 18,500 New Dorm Beds

Goal for Total Beds	18,500	% of Total
Beds Built 2011-2017	4,241	23%
Currently In/Soon to be in Construction	2,886	16%
Pipeline/Future Commitments	2,723	15%
Total Built and Planned Production	9,850	53%
Demolitions (2011-2017)	-1,114	-6%
Planned Demolitions	-220	-1%
Net Built and Planned Production	8,516	46%
Beds Left to Create	9,984	54%

Table 9 (page 13) shows the undergraduate housing need vs planned construction of new dormitories by colleges and universities. UMass Boston recently broke ground on a 1,089 dorm bed residence hall that is expected to be open by Fall 2018. This dorm is one of two projects that will add a total of 2,000 beds to UMass Boston, which previously did not have any on-campus housing. In addition, the pipeline includes 523 beds at Boston University and 691 beds at Emmanuel. In 2017, New England Conservatory added net 89 beds and Emmanuel added 395 new beds.

¹⁶ Institutional Master Plan (IMP) review is required by Article 80 for hospitals, colleges, and universities with more than 150,000 gross square feet of property. "Pipeline" refers to projects that have received zoning approval but are not yet designed or approved under Large Project Review (Institutional Master Plan); their timeline is uncertain. Please note that planned beds are based on estimates and are subject to change.

Table 9: Undergraduate Housing Need vs. Planned Beds (Greater Boston), 2017¹⁷

Institution	Undergrads in Private Housing Market	Dorm Beds Currently or Soon to Be in Construction	In Large Project Review	New Dorm Beds in Pipeline	Current or Planned Demo/Renovations	Unmet Student Housing Needs
Bay State College	84					84
Benjamin Franklin Institute	23					23
Berklee College of Music*	2,578			450		2,128
Boston Architectural College	170					170
Boston Baptist College	0					0
Boston College*	1,297			550		747
Boston Conservatory*	383					383
Boston University*	3,955			523		3,432
Emerson College*	405	294				111
Emmanuel College*	148	691		.	-220	-326
Fisher College	299					299
Harvard University	0					0
MA College of Art & Design	487					487
MA College of Pharmacy & Health Sciences*	1,704					1,704
MA Institute of Technology	286					286
MGH Institute of Health Professions	0					0
NE College of Optometry	0					0
NE Conservatory of Music*	0	.				0
New England Law Boston	0					0
Northeastern University*	6,474	812		200		5,462
School of Museum of Fine Arts	84					84
SHOWA Institute	0					0
Simmons College*	442					442
St John Seminary	8					8
Suffolk University*	1,950					1,950
Tufts University (Health Sciences)	0					0
University of MA-Boston	8,314	1,089		1,000		6,225
Urban College of Boston	0					0
Wentworth Institute*	644					644
Wheelock College*	52					52
TOTAL	29,784	2,886	0	2,723	-220	24,395

17 Schools with negative numbers in the unmet housing need column appear to show an intention to build more housing than their student body needs. In actuality, some schools set-up cross leasing arrangements with other schools or may wish to move students from off-campus managed housing, i.e., leased apartments to on-campus dorms.

Conclusion

Based on the current pace of dorm bed development, the City is on pace to meet the 18,500 dorm bed goal by 2030. Since 2013, undergraduate student enrollment has remained virtually flat. Simultaneously, the percentage of students housed on-campus has grown by 4% and more than 3,000 undergraduate beds have come online during the period. Additionally, more than 600 fewer students are living in private-housing compared to last year. However, if significant increases in graduate enrollment continue, the impact of the new dorm beds coming online in reducing pressure on the housing market may be somewhat mitigated.

Local higher education institutions continue to improve the off-campus student data they provide to the City, and flat enrollment growth, combined with dorm construction activity has allowed for some progress on closing the student housing need gap. The Walsh Administration is pleased with this progress, but remains focused on its policy of reducing the pressure on workforce housing in Boston's neighborhoods by ensuring that more student-specific housing is created. The City will continue to work closely with local institutions on improving data collection to more accurately assess the impact of new dormitory beds on the off-campus population and Boston's private market housing stock.

In the coming months, the City will explore additional tools to reduce the impact students have on our private housing market. Mechanisms to tie future plans for student dormitory creation to enrollment growth will be a critical part of this evaluation. Student housing creation must significantly exceed enrollment growth in order for the overall number of students in the private housing market to decrease.

The emerging national trend for private dormitory creation could be one way to unlock faster student housing production, particularly at the graduate student level. While the City will hold universities accountable for making significant investments of their own capital in housing creation, the addition of new private developers working in partnership with schools to provide student-specific housing could have a positive effect on housing affordability in Boston.

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 information on where they are living (on-campus or off-campus). The overall quality of the reporting has improved with each report. For example, some schools were able to provide significantly improved data. We commend them for their efforts. Unfortunately, this shift has created some complications in analyzing trends over time, particularly with respect to the type of off-campus living arrangement (off-campus at-home vs off-campus not-at-home); the type of property students live in (i.e. single-family vs condominium); and migration shifts between Boston neighborhoods. What follows is a brief discussion of the data issues involved with the major focus areas of this report. The footnotes in the report contain specific information about any necessary data reconciliations. Please note this report is based only on Fall Semester data.

Off-Campus Housing: In 2013, the off-campus numbers were not separated into the sub-categories of students, i.e., off-campus (at-home), off-campus (not-at-home), and living in university-managed housing that were reported on in 2014-2017. This limits the comparison of the off-campus subgroups to the baseline data. Furthermore, there are a small number of institutions that have not made these distinctions in any UAR report.

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

Off-Campus (Not Living at-home): This category was formerly called "private housing", and refers to students who neither live with parents or legal guardians nor in any housing facility that is owned or controlled by the educational institution. This category aims to identify students who entered Boston's private housing market to facilitate study at a Boston-based institution. Generally, these students have two different addresses for "local/mailling" and "home/permanent". Please note that for graduate students, the address matching methodology is less effective in identifying students living in the private housing market given that the concept of "home" can often be wherever the student resides at the time.

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

Geographic Distribution: For this report, we only reported on the 2017 distribution of off-campus students (private housing) by zip codes and the property types in which they lived. Because of data incompatibilities from 2013-2016, we refrained from presenting changes of students for a given neighborhood. As the data continues to stabilize and schools refine their reporting methods, we hope to be able to do this in the future.



Appendix B: Enrollment

Table B1 provides further breakout of total enrollment at each school by class level (undergraduate and graduate), while Table B2 provides a breakout of enrollment by full-time or part-time status.

Table B1: Enrollment Change by School and Class Level, 2013-2017¹⁸

Institution Name	Undergraduate Enrollment				Graduate Enrollment			
	2013	2017	Change	% Change	2013	2017	Change	% Change
Bay State College	1,098	560	-538	-49.0%	0	0	0	N/A
Benjamin Franklin Institute	463	540	77	16.6%	0	0	0	N/A
Berklee College of Music	4,402	4,449	47	1.1%	117	44	-73	-62.4%
Boston Architectural College	407	307	-100	-24.6%	318	349	31	9.7%
Boston Baptist College	96	99	3	3.1%	0	0	0	N/A
Boston College	9,049	9,358	309	3.4%	4,476	4,638	162	3.6%
Boston Conservatory	545	612	67	12.3%	229	260	31	13.5%
Boston University	16,871	16,812	-59	-0.3%	10,637	10,869	232	2.2%
Emerson College	3,720	3,841	121	3.3%	803	653	-150	-18.7%
Emmanuel College	2,059	1,881	-178	-8.6%	261	130	-131	-50.2%
Fisher College	978	952	-26	-2.7%	0	41	41	N/A
Harvard University	0	0	0	N/A	3,830	3,924	94	N/A
MA College of Art & Design	1,776	1,739	-37	-2.1%	134	127	-7	-5.2%
MA College of Pharmacy & Health Sciences	3,499	2,750	-749	-21.4%	970	1,702	732	75.5%
MA Institute of Technology	4,528	4,544	16	0.4%	6,773	6,890	117	1.7%
MGH Inst. of Health Professions	307	559	252	82.1%	995	1,022	27	2.7%
NE College of Optometry	0	0	0	N/A	502	528	26	N/A
New England Conservatory	430	436	6	1.4%	382	408	26	6.8%
New England Law Boston	0	0	0	N/A	964	560	-404	N/A
Northeastern University	17,924	18,813	889	5.0%	8,513	11,725	3,212	37.7%
School of Museum of Fine Arts	484	222	-262	-54.1%	167	71	-96	-57.5%
SHOWA Institute	263	222	-41	-15.6%	0	0	0	N/A
Simmons College	1,732	1,767	35	2.0%	2,923	4,533	1,610	55.1%
St John Seminary	43	26	-17	-39.5%	149	165	16	10.7%
Suffolk University	5,593	5,067	-526	-9.4%	2,844	1,765	-1,079	-37.9%
Tufts Univ. (Health Sciences)	0	0	0	N/A	2,632	2,790	158	N/A
University of MA-Boston	10,122	10,548	426	4.2%	2,682	2,416	-266	-9.9%
Urban College of Boston	767	755	-12	-1.6%	0	0	0	N/A
Wentworth Institute	3,708	4,219	511	13.8%	244	190	-54	-22.1%
Wheelock College	859	604	-255	-29.7%	464	207	-257	-55.4%
TOTAL ENROLLMENT	91,723	91,682	-41	0.0%	52,009	56,007	3,998	7.7%

¹⁸ Total enrollment figures include both full-time and part-time students. The Northeastern enrollment numbers from 2013-2016 have been revised because previous reporting included online students.

Table B2: Enrollment by Degree Level and Full-Time and Part-Time Status, 2017¹⁹

Institution Name	Undergraduate Enrollment			Graduate Enrollment		
	Full Time	Part Time	Total	Full Time	Part Time	Total
Bay State College	374	186	560	0	0	0
Benjamin Franklin Institute	468	72	540	0	0	0
Berklee College of Music	3,968	481	4,449	20	24	44
Boston Architectural College	195	112	307	267	82	349
Boston Baptist College	59	40	99	0	0	0
Boston College	9,358	0	9,358	3,514	1,124	4,638
Boston Conservatory	605	7	612	237	23	260
Boston University	16,571	241	16,812	8,992	1,877	10,869
Emerson College	3,788	53	3,841	569	84	653
Emmanuel College	1,840	41	1,881	0	130	130
Fisher College	744	208	952	12	29	41
Harvard University	0	0	0	3,559	365	3,924
MA College of Art & Design	1,662	77	1,739	67	60	127
MA College of Pharmacy & Health Sciences	2,579	171	2,750	1,661	41	1,702
MA Institute of Technology	4,510	34	4,544	6,642	248	6,890
MGH Inst. of Health Professions	196	363	559	760	262	1,022
NE College of Optometry	0	0	0	528	0	528
New England Conservatory	407	29	436	384	24	408
New England Law Boston	0	0	0	380	180	560
Northeastern University	18,645	168	18,813	10,492	1,233	11,725
School of Museum of Fine Arts	209	13	222	67	4	71
SHOWA Institute	222	0	222	0	0	0
Simmons College	1,558	209	1,767	1,622	2,911	4,533
St John Seminary	26	0	26	100	65	165
Suffolk University	4,792	275	5,067	1,104	661	1,765
Tufts Univ. (Health Sciences)	0	0	0	2,678	112	2,790
University of MA-Boston	8,314	2,234	10,548	953	1,463	2,416
Urban College of Boston	67	688	755	0	0	0
Wentworth Institute	3,876	343	4,219	83	107	190
Wheelock College	593	11	604	115	92	207
TOTAL ENROLLMENT	85,626	6,056	91,682	44,806	11,201	56,007

19 Ibid

Chart B1: Top 10 Schools by Total Enrollment Change, 2016-2017

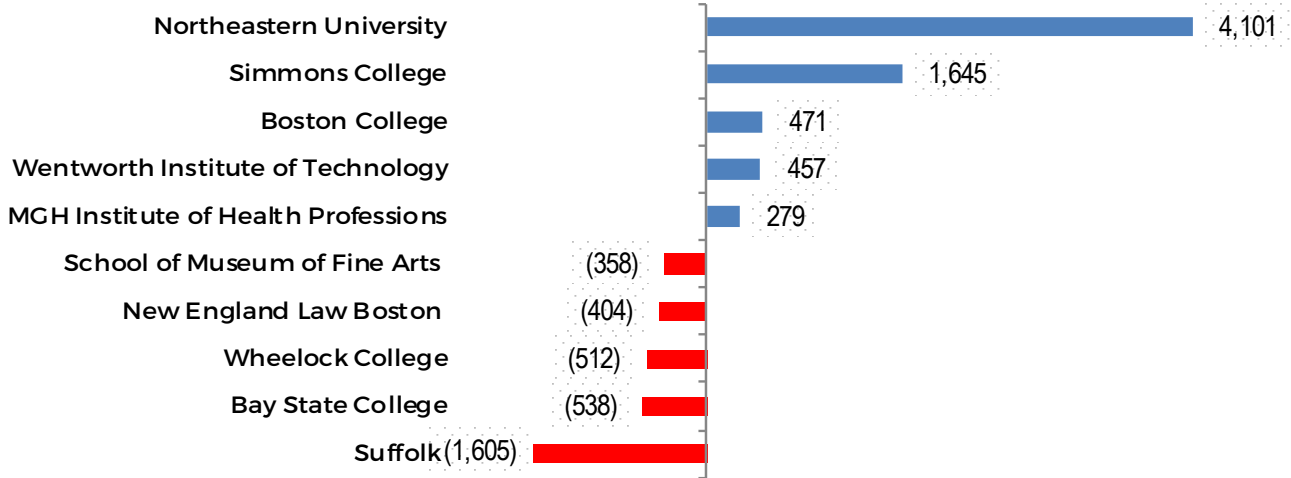
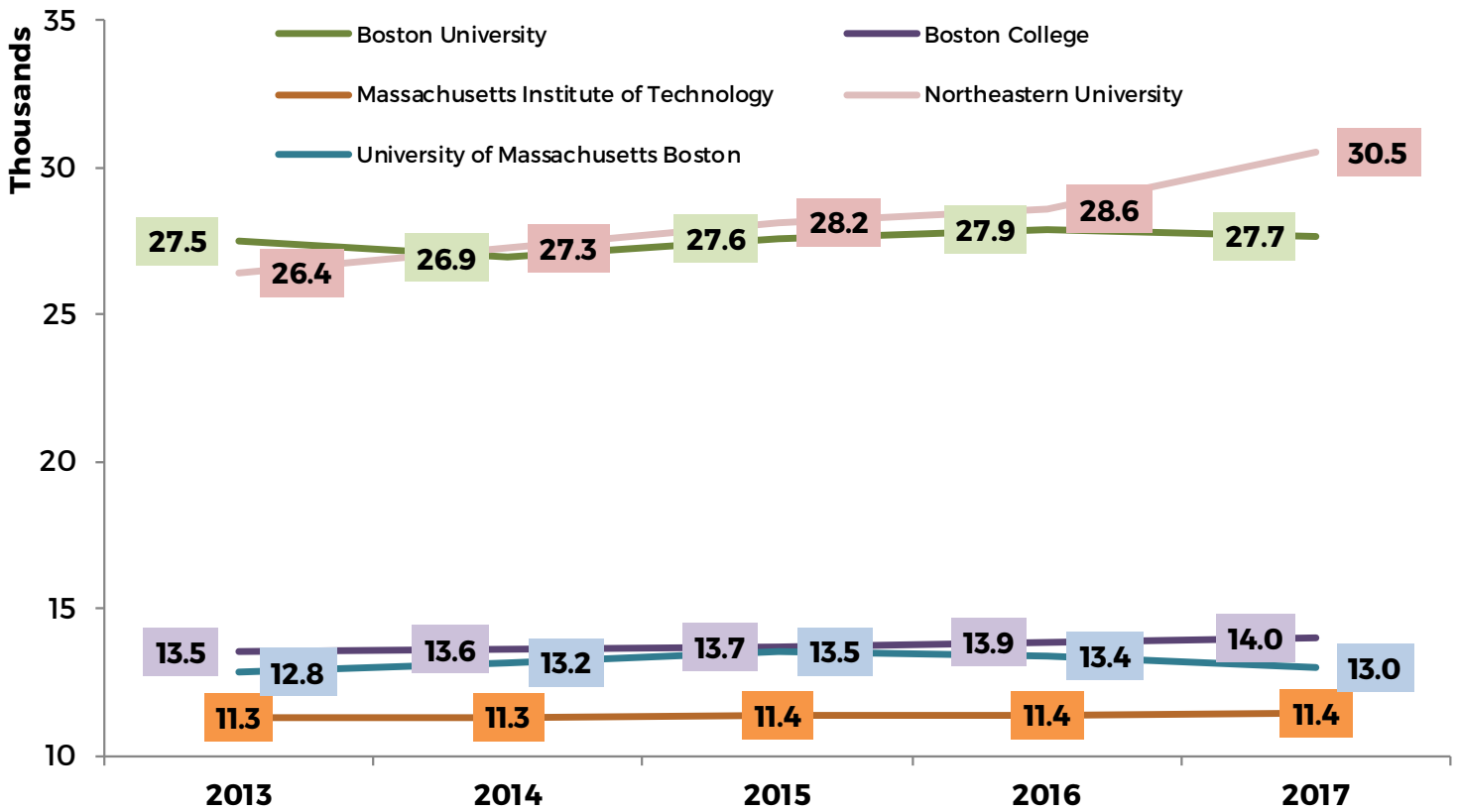


Chart B2: Total Enrollment for Schools with at least 10,000 Students, 2013-2017



Appendix C: Students in Boston’s Private Housing Market by School

Chart C1: Top 10 Schools with Undergraduates Students in Boston's Private Housing Market, 2017²⁰

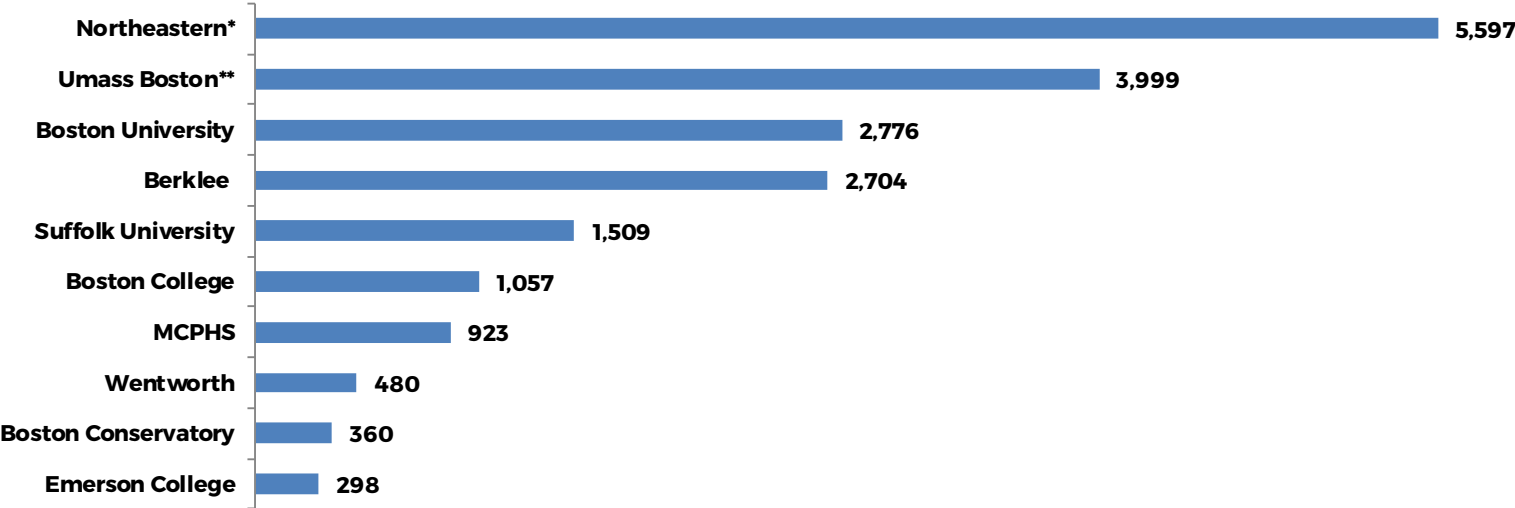
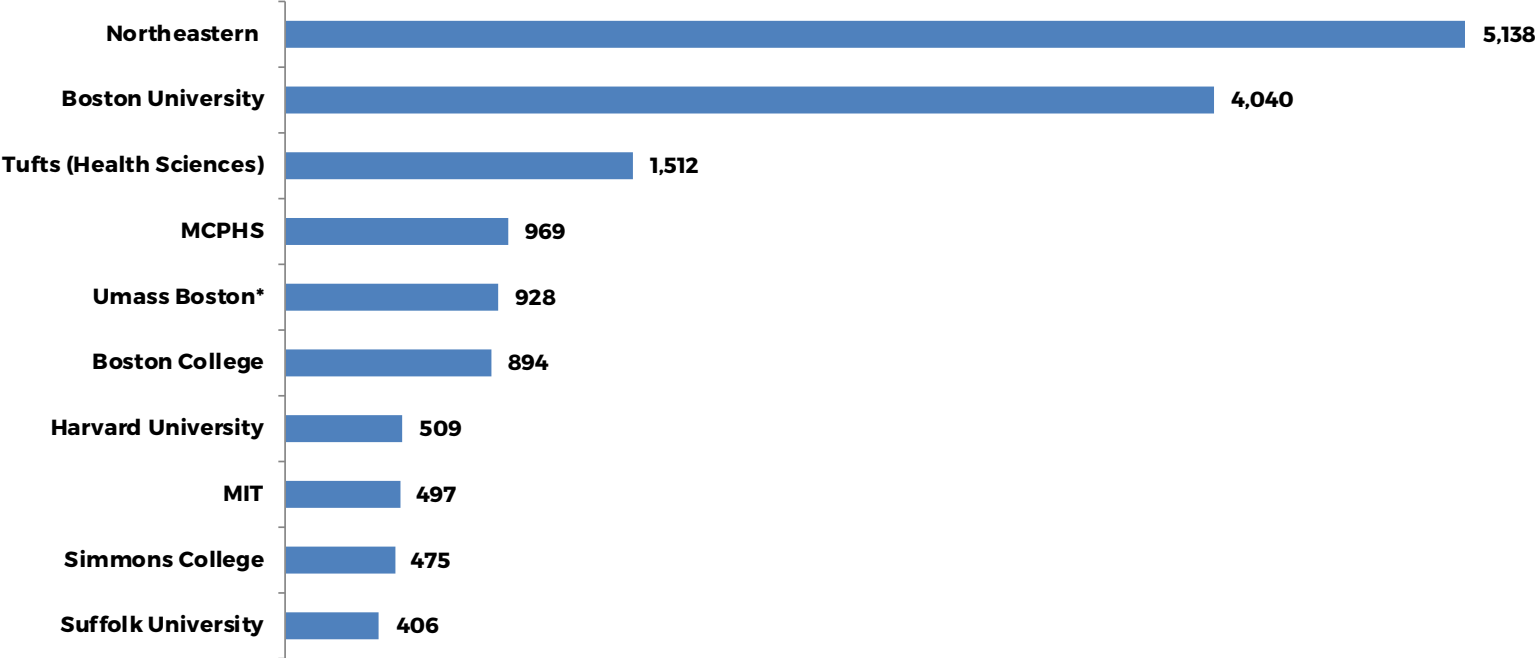


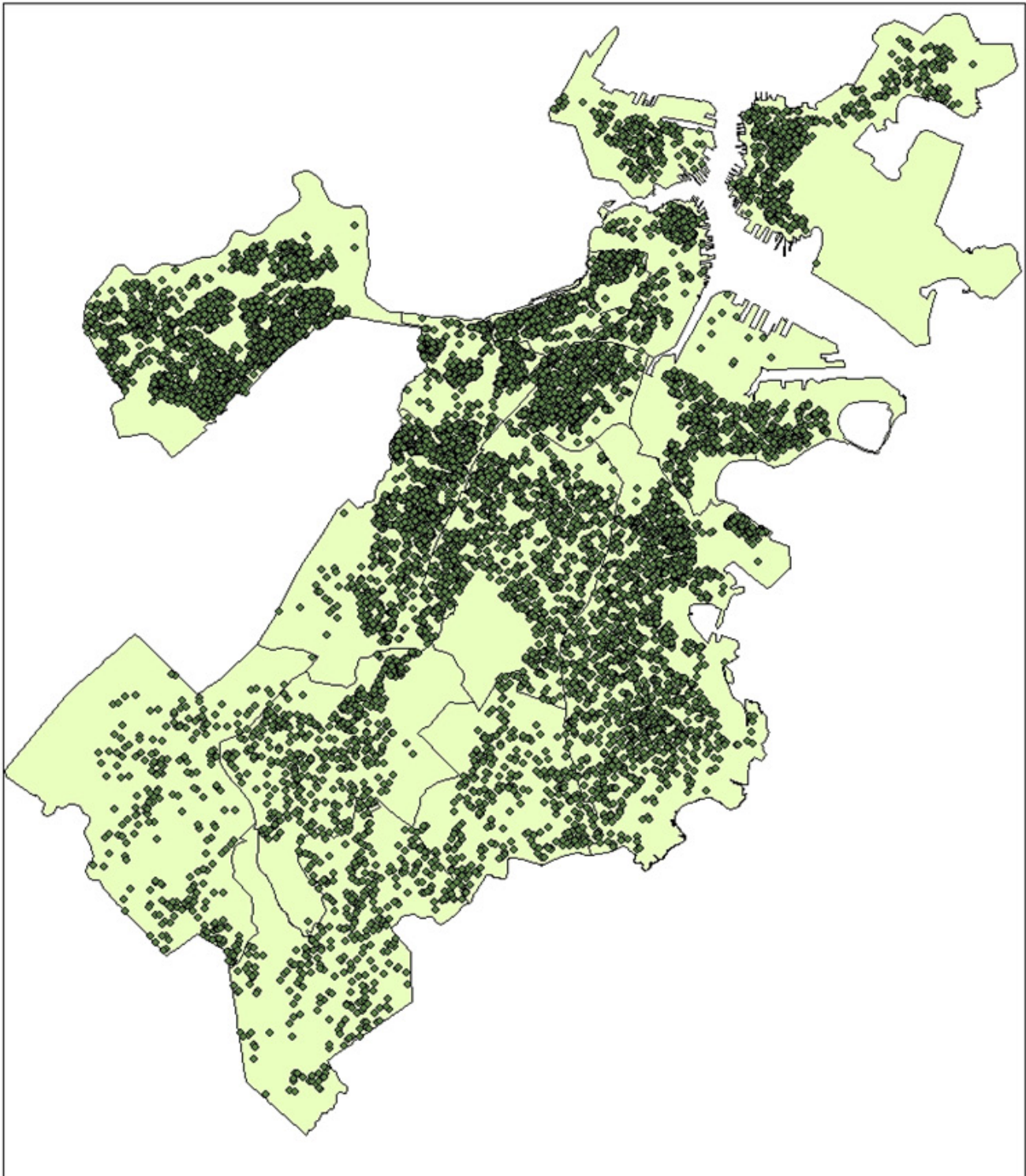
Chart C2: Top 10 Schools with Graduate Students in Boston's Private Housing Market, 2017²⁰



²⁰ The UMass Boston data reflects the gross off-campus count since UMB did not distinguish between students residing off-campus (living-at-home) and off-campus (not-at-home).

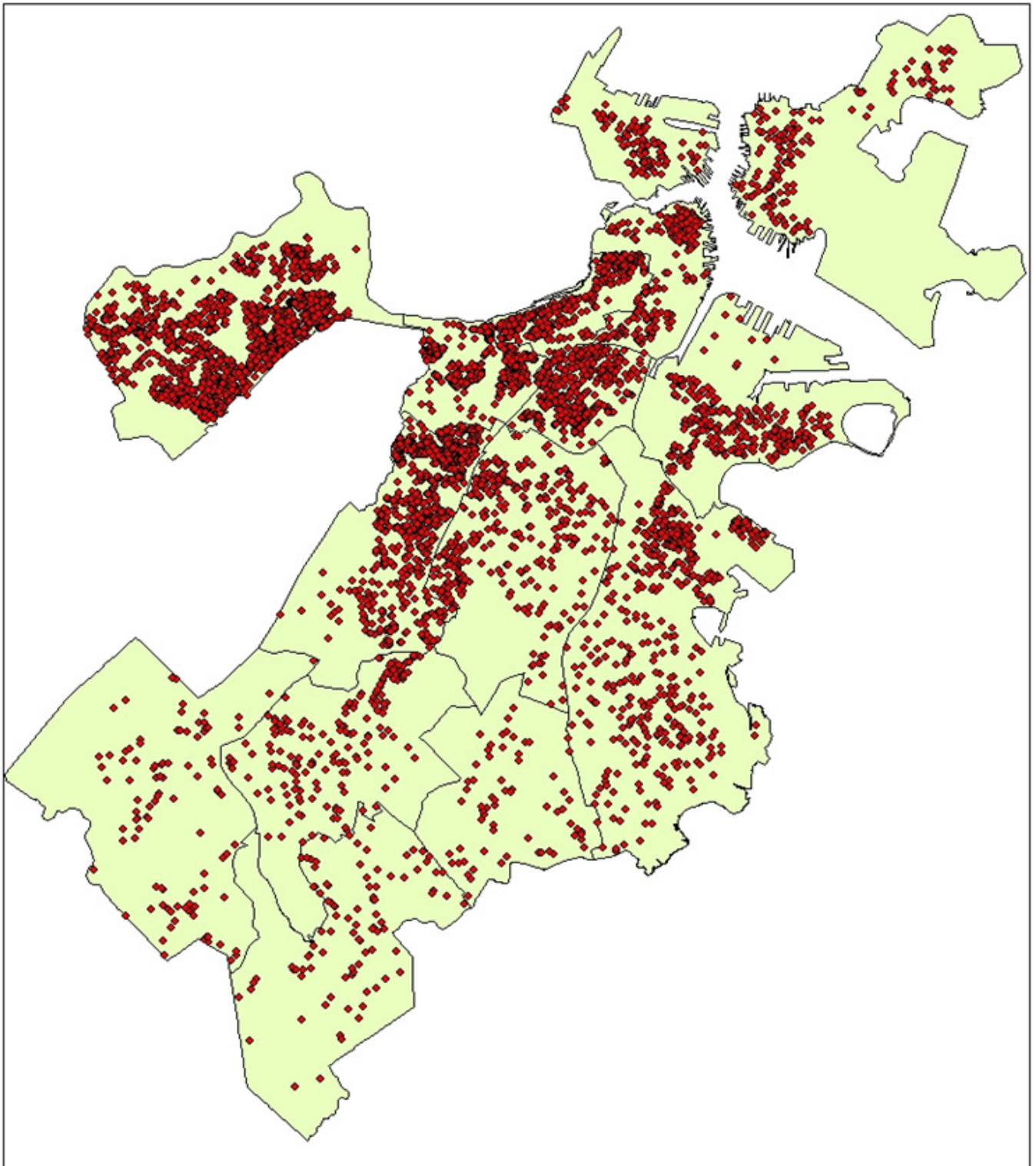
Appendix D: Student Distribution Maps and Tables

Map D1: Map Of Off-Campus Undergraduate Student Distribution²¹



²¹ Based on geocoded Off-Campus addresses obtained from Fall 2017 University Accountability Reports. Neighborhood boundaries are based on DND and BPDA districts and may not necessarily align with neighborhood boundaries from other sources.

Map D2: Map Of Off-Campus Graduate Student Distribution²²



22 Ibid

Table D1: Off-Campus (Private Housing) Students by Neighborhood (DND Districts)

Neighborhood	Undergraduates	Graduates	Total	% of Grand Total
Allston/Brighton	4,280	4,206	8,486	24.1%
Back Bay/Beacon Hill	1,080	795	1,875	5.3%
Central	921	974	1,895	5.4%
Charlestown	87	85	172	0.5%
Dorchester	1,967	682	2,649	7.5%
East Boston	602	196	798	2.3%
Fenway/Kenmore	5,017	3,275	8,292	23.5%
Hyde Park	293	90	383	1.1%
Jamaica Plain	2,924	2,350	5,274	15.0%
Mattapan	246	72	318	0.9%
Roslindale	290	200	490	1.4%
Roxbury	950	521	1,471	4.2%
South Boston	238	348	586	1.7%
South End	1,054	1,261	2,315	6.6%
West Roxbury	173	96	269	0.8%
TOTAL	20,122	15,151	35,273	100.0%

Table D2: Off-Campus (Private Housing) Students by Neighborhood (BPDA Districts)

Neighborhood	Undergraduates	Graduates	Total	% of Grand Total
Allston	2,480	2,266	4,746	13.5%
Back Bay	1,039	771	1,810	5.1%
Bay Village	45	45	90	0.3%
Beacon Hill	173	244	417	1.2%
Brighton	1,800	1,949	3,740	10.6%
Charlestown	87	85	172	0.5%
Chinatown	191	385	576	1.6%
Dorchester	2,167	727	2,894	8.2%
Downtown	259	242	501	1.4%
East Boston	602	196	798	2.3%
Fenway	4,713	2,434	7,147	20.3%
Hyde Park	279	86	365	1.0%
Jamaica Plain	567	812	1,379	3.9%
Leather District	12	9	21	0.1%
Longwood Medical Area	82	161	243	0.7%
Mattapan	185	62	247	0.7%
Mission Hill	2,621	2,187	4,808	13.6%
North End	233	142	375	1.1%
Roslindale	245	125	370	1.0%
Roxbury	1,409	803	2,212	6.3%
South Boston	224	324	548	1.6%
South Boston Waterfront	14	24	38	0.1%
South End	326	827	1,153	3.3%
West End	196	158	354	1.0%
West Roxbury	173	96	269	0.8%
TOTAL	20,122	15,151	35,273	100.0%

Table D3: Zip Code Distribution Table

Neighborhood by Zip Code	Undergraduates	Graduates	All Students	% of All Students	% of Tier/Group
02115 Fenway/Kenmore	3,616	1,599	5,215	14.8%	64%
02120 Mission Hill	2,757	2,109	4,866	13.8%	
02134 Allston	2,488	2,301	4,789	13.6%	
02215 Longwood/ Mission Hill/Fenway	2,133	1,712	3,845	10.9%	
02135 Brighton	1,792	1,905	3,697	10.5%	
02125 Upham's Corner/ Columbia Point	1,300	463	1,763	5.0%	19%
02118 South End	678	1,020	1,698	4.8%	
02130 Jamaica Plain	539	843	1,382	3.9%	
02119 Roxbury	594	332	926	2.6%	
02116 Back Bay	364	469	833	2.4%	
02128 East Boston	602	196	798	2.3%	10%
02111 Chinatown	278	453	731	2.1%	
02114 West End	346	364	710	2.0%	
02124 Dorchester	472	149	621	1.8%	
02127 South Boston	224	324	548	1.6%	
02131 Roslindale	256	134	390	1.1%	5%
02122 Bowdoin	295	93	388	1.1%	
02136 Hyde Park	279	82	361	1.0%	
02113 North End	205	122	327	0.9%	
02121 Dorchester	243	73	316	0.9%	
Other	661	408	1,069	3.0%	3%
TOTAL ZIP CODES	20,122	15,151	35,273	100.0%	100%

Appendix E: Additional Dorm bed Data

Chart E1: New Dorm Beds Permitted by Year, 2011-2017

