

## COMMITTEE OF COUNCIL REPORT

### Town and Gown Committee Waterloo Student Accommodations Report #: CTTEE2023-002

#### **Recommendation:**

That Council endorse report CTTEE2023-002 and supports the Committee in their planned next steps.

#### **Executive Summary:**

The Waterloo Town and Gown Committee develops and enhances relationships, communications and policies among the universities, college, students, city, police and the community. To achieve this mandate, the committee addresses such issues of common concern as neighbourhood development and community relations, housing, the environment, economic activities, charitable/volunteer programs, recreational and cultural events, health and safety issues, and academic outreach.

Starting in Fall 2022, the Committee's Student Accommodations Working Group undertook data collection and analysis to: 1) understand the supply-demand dynamics that impact student accommodations in Waterloo, and 2) understand expectations and satisfaction drivers for student accommodations. This was done by updating the 2016 supply-demand work and doing another student housing survey. The attached presentation highlights the main findings from this work as well as next steps.

#### **Financial Implications:**

None

Prepared By: Tanja Curic

Date: August 21, 2023

Committee Chair Signature: *Chr Read*

**Technological Implications:**

None

**Link to the Strategic Plan:**

The Town and Gown Committee's student accommodations work aligns with Strategic Priority 3: Complete Community that has an objective of complete neighbourhoods which includes collaborating with community partners on housing initiatives in our community.

Waterloo Town and Gown Committee

Student Housing Working Group

September 11, 2023 Presentation to Waterloo City Council

# **WATERLOO STUDENT HOUSING**

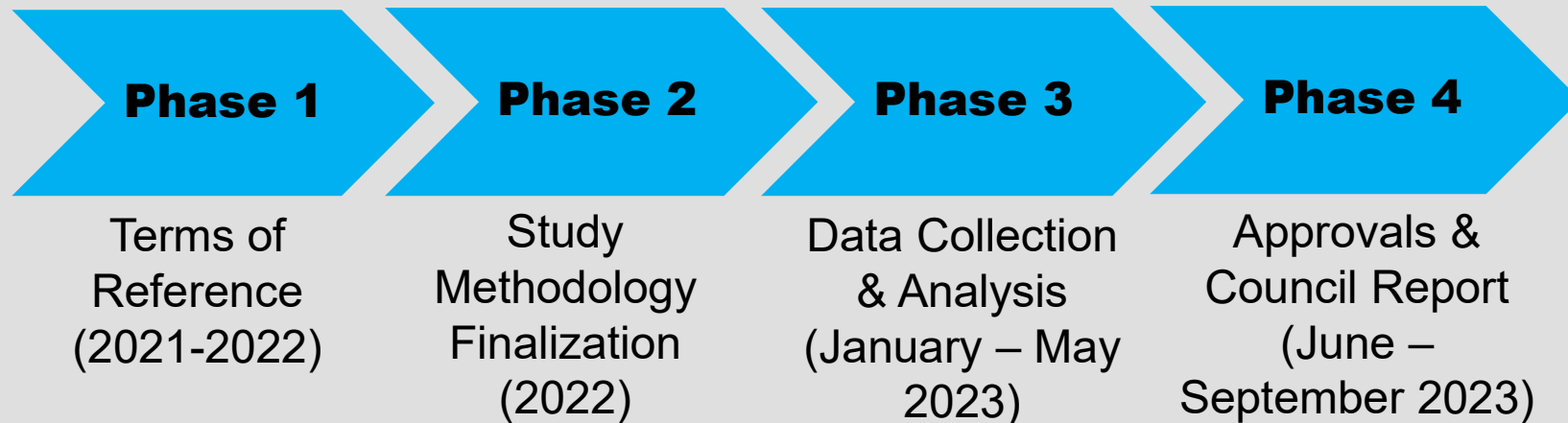
# Town & Gown Committee

- The Waterloo Town and Gown committee develops and enhances relationships, communications and policies among the universities, college, students, city, police and the community.
- The Committee provides strategic direction of town and gown matters, issues and concerns through a collective approach.
- Creation of permanent Student Accommodations Working Group in 2022 (previously was ad hoc)

# Study Approach

- Third comprehensive review (2014, 2016, 2022) on student accommodations in Waterloo.
  - Mini supply review in 2020
- Understand the supply-demand dynamics that impact student accommodations in Waterloo.
- Analysis to understand expectations and satisfaction drivers for student accommodations (survey).

# Study Process Overview



# Supply and Demand Analysis

- Focus of this work has been to:
  - Minimize the number of limitations identified in the previous studies
  - Include Conestoga College in the analysis

# Student Housing Demand

Indicator	Description	2022/23
Total Undergraduate Enrolment	# Full-time UG students at Waterloo campuses as of Fall term 2022	44,000
Total Graduate Enrolment	#Full-time Grad students at Waterloo campuses as of Fall term 2022	+5,330
Local Co-op Work Term Students	# students with local co-op work term	+1,670
Non-tenant/Commuter Waterloo Students*	# students not renting in city, residing at home or traveling to campus from outside the City	-6,405
Total Potential Student Tenants	# total Waterloo students less non-tenant/commuter students	44,595
Total Potential Off-Campus Tenants	# total potential student tenants less on-campus beds	35,360

**\*2023 changed methodology from using 25% discount factor (would result in 12,330 discount) to a more nuanced approach focused on type of institution and student (results in only a 6,405 discount)**

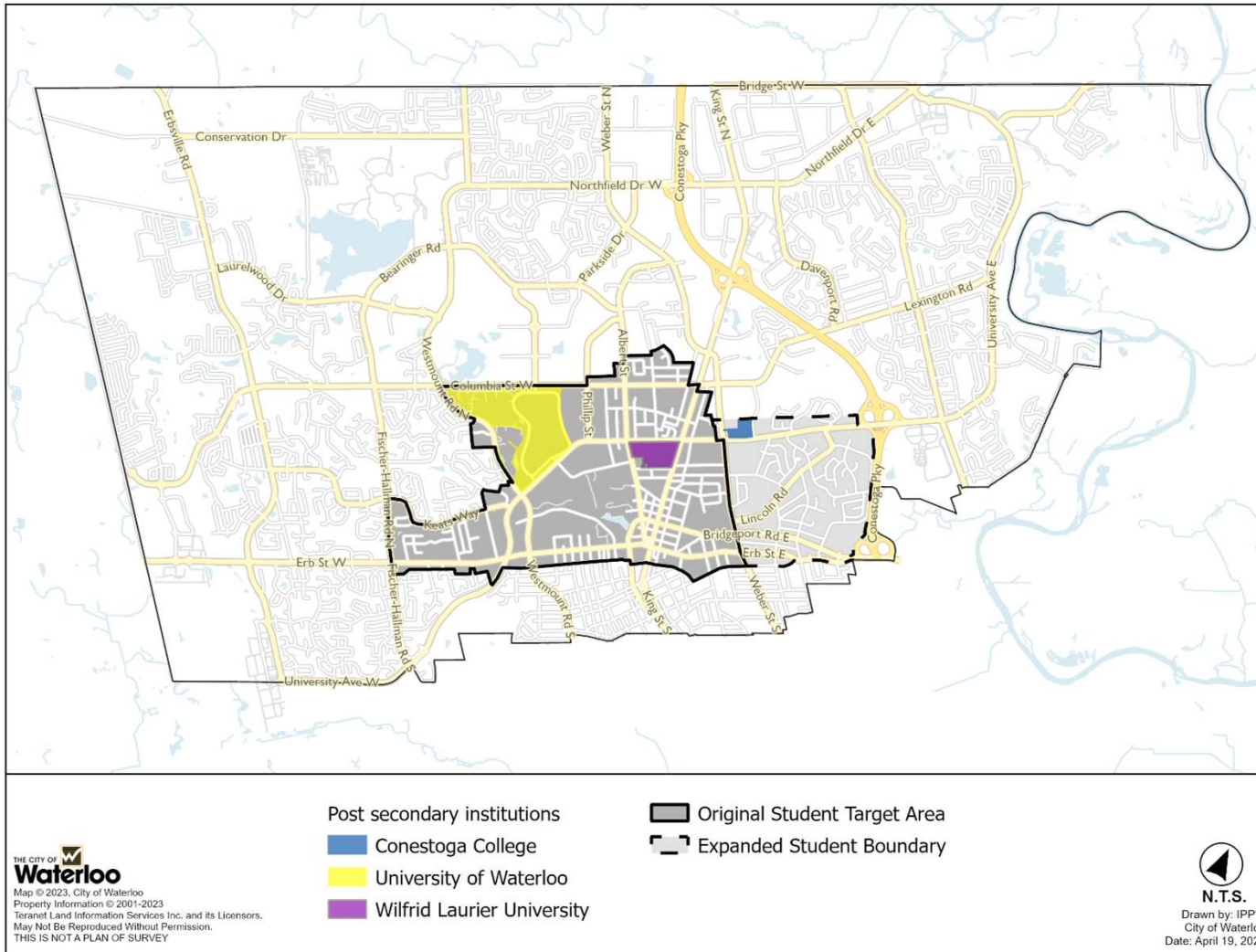


# Student Housing Supply

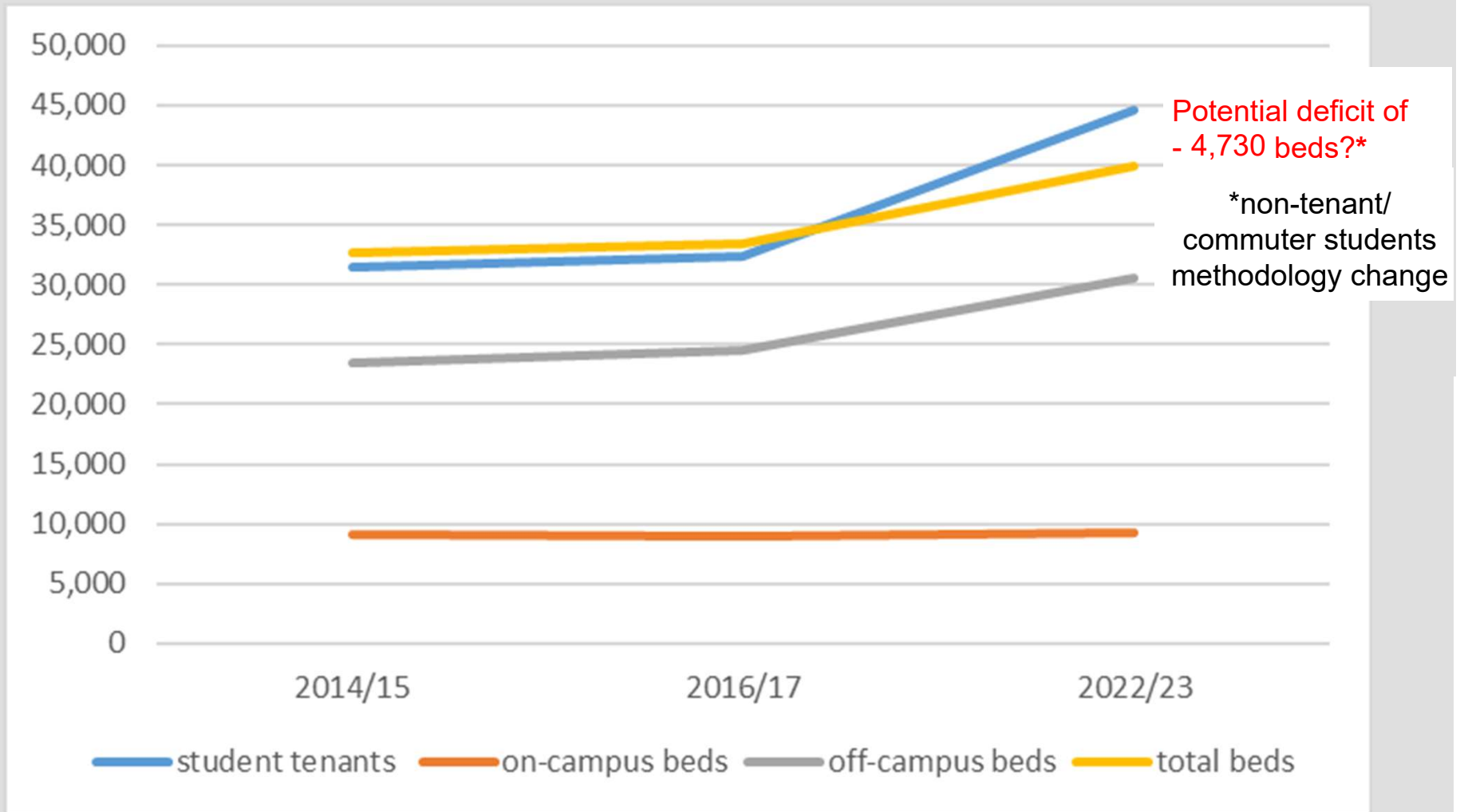
Indicator	Description	Value
On-Campus Beds	# beds available on-campus in Waterloo	9,235
Low-Density Licensed Rentals	# beds in low density licensed rental units	+5,900
Multi-Residential Beds	# beds in multi-residential buildings in catchment area as of year-end 2022*	+22,285
Traditional Apartment Beds	# beds in traditional apartments	+2,445
Total Rental Beds Available	# on- and off-campus beds	39,865
Total Off-Campus Beds	# total rental beds available less on-campus beds	30,630

\*Avg. # of multi-res. beds in catchment area = 2.6 (down from 3.5 beds per unit in 2016)

# Catchment Area



# Findings



\*see data limitations

# Data Limitations

- Illegal and not approved beds
  - Illegal conversion of “dens/studies/dining rooms” to bedrooms – potential minimum of 3,450 rooms
  - Not all low rise rentals are licensed
- Exact % of rental licensing bedrooms is unknown
- Multi-residential beds outside catchment areas are not included and those prior to 2000 appear to be undercounted
- Traditional apartment beds appear to be undercounted
- There may be non-students residing in dwellings
- Exact % of non-tenant/commuter students is not known
- Assume 1 bed equates to only 1 person but potential for doubling-up
- Does not include potential future beds coming down stream

Drops potential deficit to -1,280 beds

# Potential Coming Down Stream

Indicator	Description	Value
On-Campus Beds	# of approved on-campus beds proposed to be built by institutions	0
Multi-Residential Beds	# beds in multi-residential buildings that have received building permits but were not constructed or occupied by December 31, 2022	+1,315
Site Plan and Zone Change Application Beds	# proposed beds identified in formal site plans and zone change applications as of December 31, 2022	+2,530*
Rental Licensing Applications Under Review Beds	# beds in rental licensing applications under review as of February 2023	+815
Total Potential Future On- and Off-Campus Beds	# proposed on- and off-campus beds	4,660

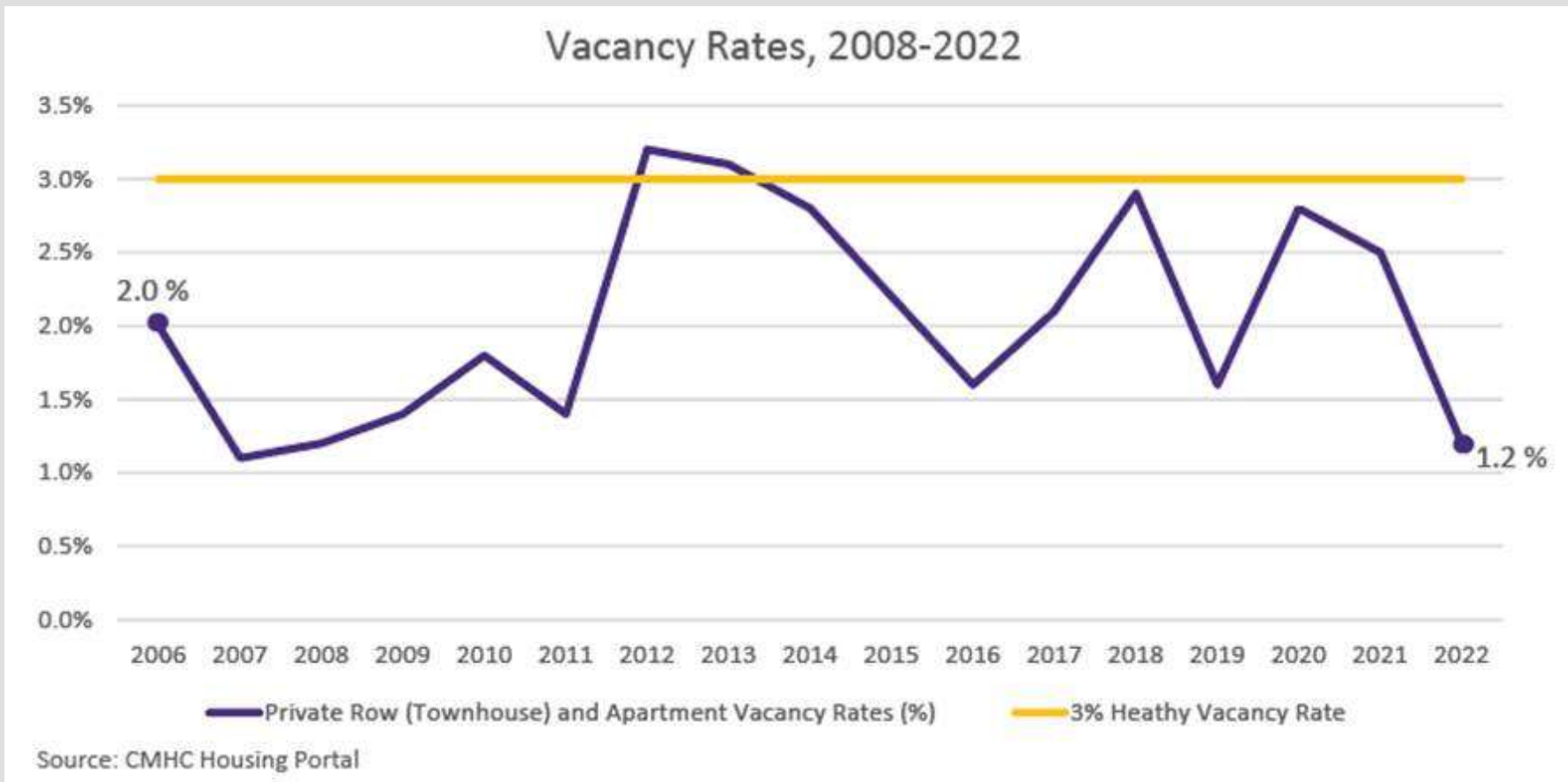
\*33% of the potential site plan/zone change beds were identified on the 2016 and/or 2020 lists

\*\*data does not include potential minimum of 1,690 illegal/not approved “dining rooms” in proposed plans

# Capital of Purpose Built Student Housing

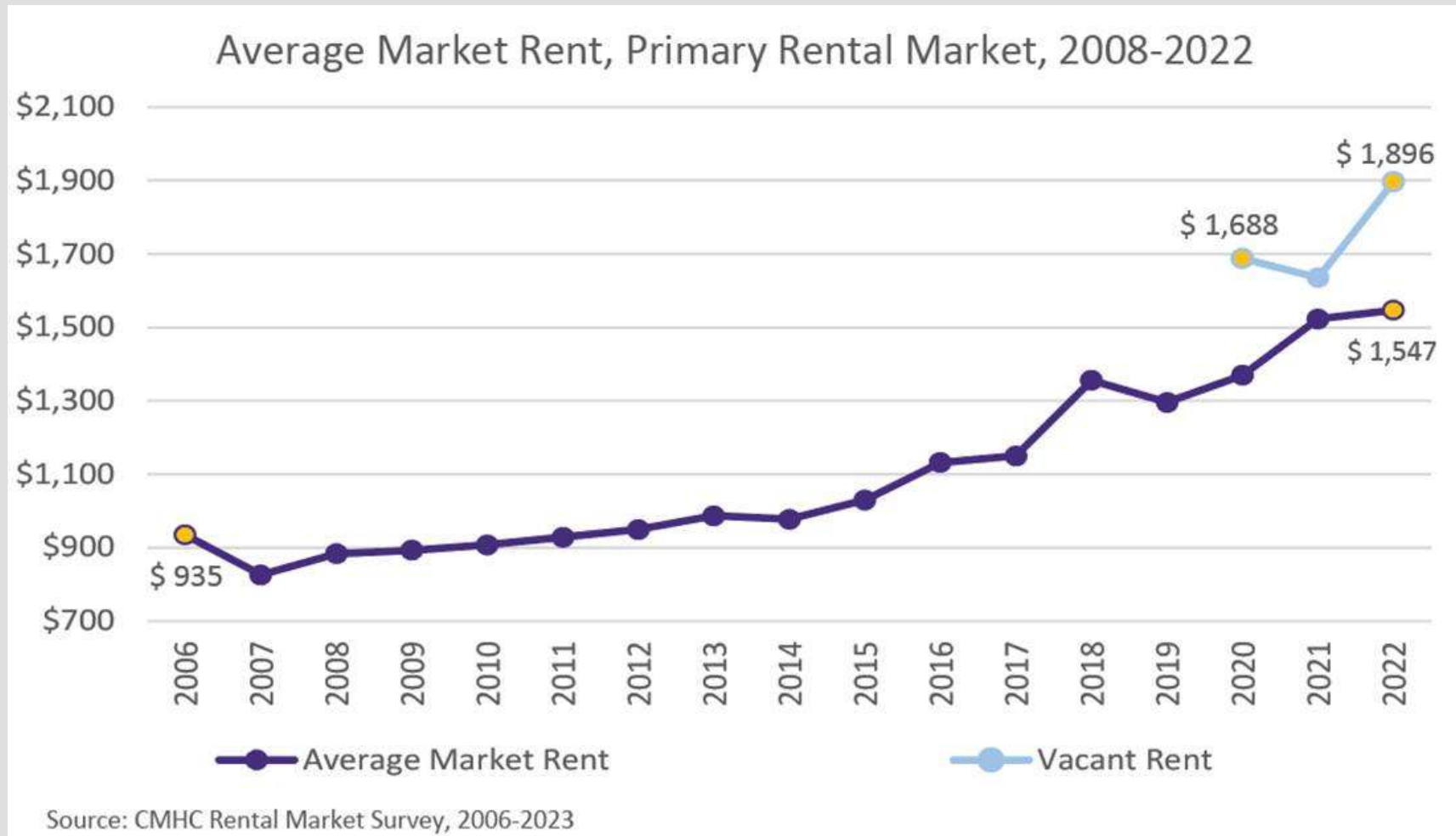
- A 2019 study by former UW PhD student Nick Revington found that almost half of all off-campus, purpose-built student housing is in Waterloo
- “The City of Waterloo is the Canadian capital for off-campus purpose built specifically for students. And the competition isn’t even close” The Record, James Jackson (Dec. 19, 2019)
  1. Waterloo – 42.0% (17,567 beds)
  2. London – 9.8% (4,096 beds)
  3. Montreal – 4.8% (2,206 beds)

# Regular Market Conditions



\*Does not include traditional student housing rented by the bedroom

# Regular Market Conditions



**\*Does not include traditional student housing rented by the bedroom**



# Additional Considerations

- National housing crisis
- COVID impacts including some buildings switching to other demographics e.g., 139 University Ave. W.
- RTA rent increase guidelines do not apply to vacant units and units occupied for 1<sup>st</sup> time after November 2018
- Local institutional enrolment continues to grow
  - 5 year projected growth of 5,400 students (about 1,080 students per year), many will require housing
- Students from non-Waterloo campuses (mainly Kitchener and some Stratford) residing in Waterloo
  - potentially upwards of 3,000 students

# Student Housing Survey

- Online survey to gather insights from students was imperative (March-April)
  - Expectations, satisfaction and experiences
- Student associations helped to promote and engage with students to complete this survey

**4,248**

Student responses

# Student Respondent Profile

- 93.1% attended a Waterloo campus
- 88.3% were an undergraduate student
- 82.7% were a domestic student
- 97.3% were a full-time student



67.5%



25.0%



7.5%

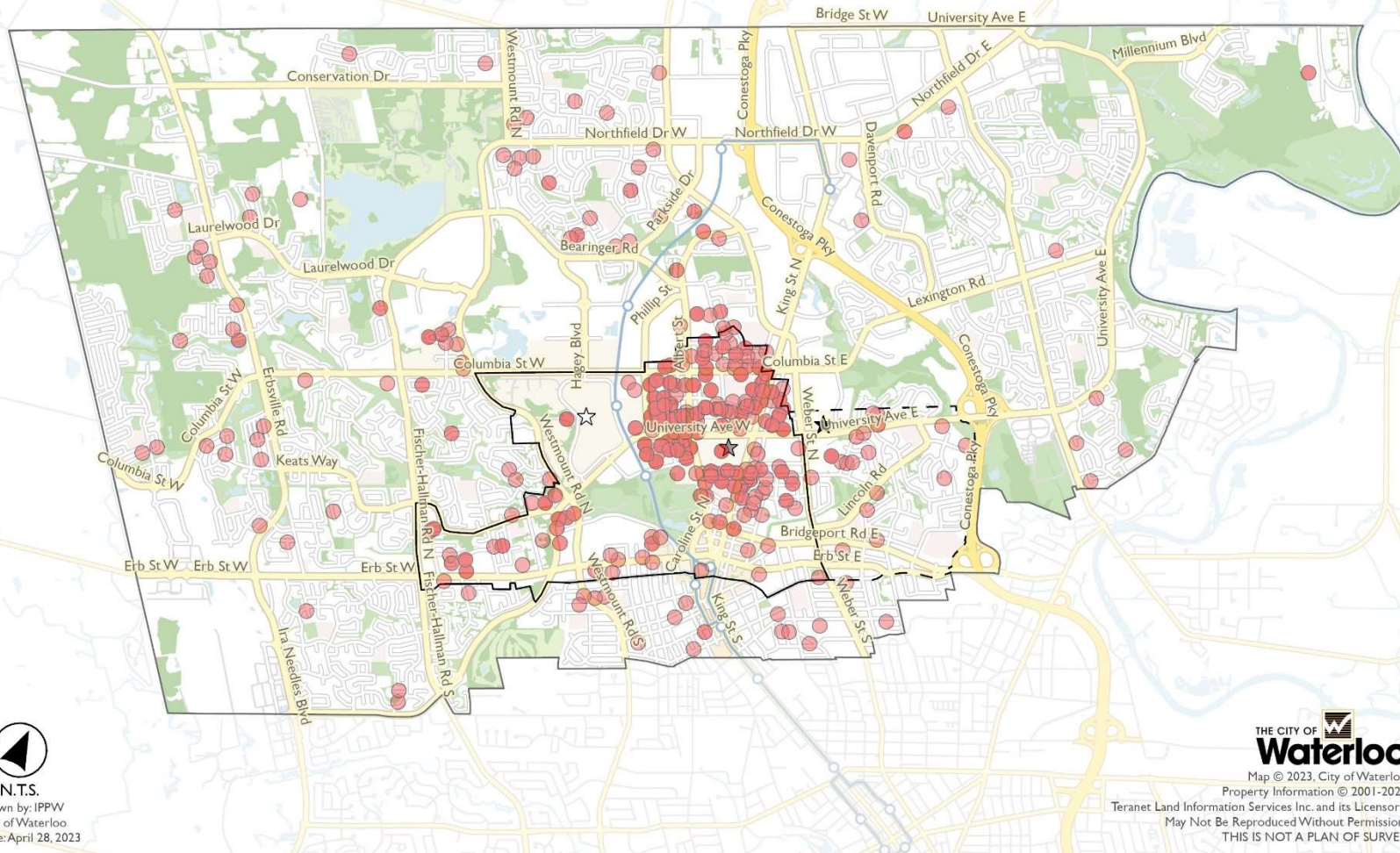
# Student Experiences

- **Student distribution**
  - 82.7% of students live in the City of Waterloo
  - 41.5% live less than 10 minutes travel to campus
  - 62.4% walk as their primary means of getting to campus
- **Overall satisfaction**
  - 83.4% are satisfied/very satisfied\* with current housing

\*not defined
- **Reason for choosing where they live**
  - Price, Availability of Good Quality Internet, Cleanliness, Privacy, and Proximity to Campus.
    - Cleanliness increasingly important over the last few years
    - Proximity to campus has declined

# Student Housing Survey Responses by Postal Code

- Student Response Location
- Existing Student Target Area
- Expanded Student Boundary
- ★ Conestoga College
- ☆ Wilfrid Laurier University
- ☆ University of Waterloo



N.T.S.  
 Drawn by: IPPW  
 City of Waterloo  
 Date: April 28, 2023

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# Findings

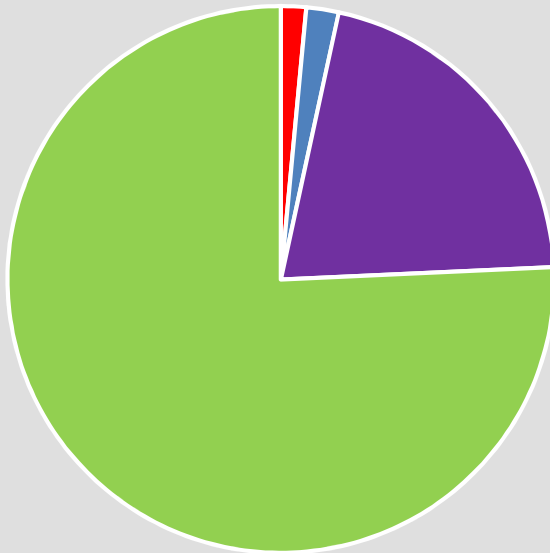
	2014	2016	2023
<b>Live in an apartment building</b>	36.8%	41.2%	51.9%
<b>Found it difficult to secure housing</b>	35.0%	28.7%	63.3%
<b>Improved sense of community belonging</b>	66.7%	67.3%	63.6%
<b>Were not informed about the RTA*</b>	56.2%	34.6%	38.1%
<b>Were not aware of rental licensing</b>	61.7%	58.9%	78.4%
<b>Living expenses as expected</b>	55.9%	61.5%	42.0%

\*RTA stands for Residential Tenancies Act

# Student Safety

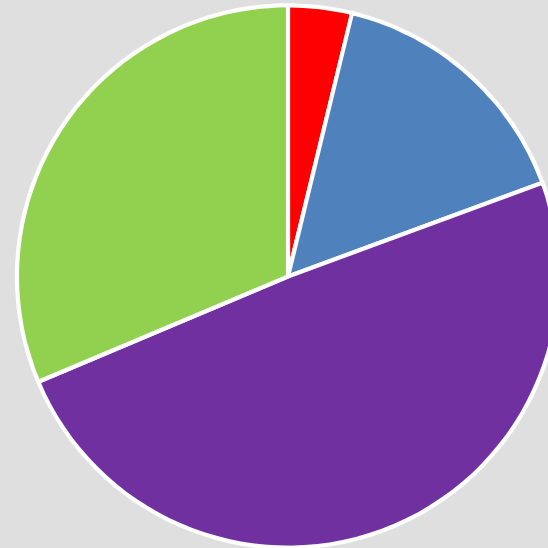
- Do you feel safe on campus (%)?

Campus Safety (daytime)



■ Not safe at all   ■ Somewhat unsafe  
■ Somewhat safe   ■ Very Safe

Campus Safety (nighttime)



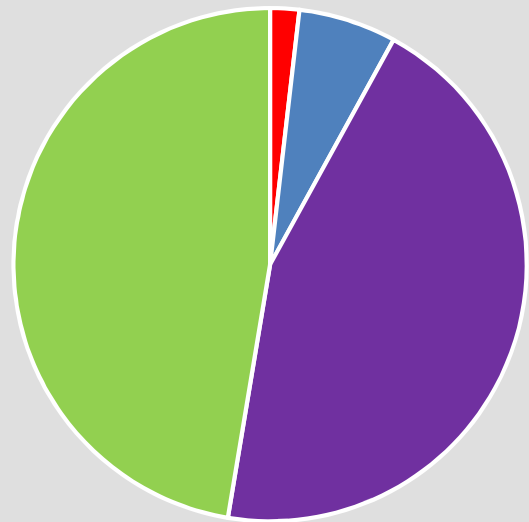
■ Not safe at all   ■ Somewhat unsafe  
■ Somewhat safe   ■ Very Safe

\*Survey preceded the June 28, 2023 attack at UW

# Student Safety

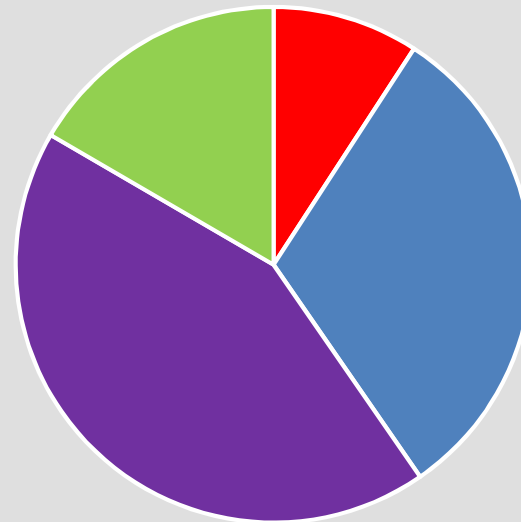
- Do you feel safe in the community (%)?

Community Safety (daytime)



■ Not safe at all    ■ Somewhat unsafe  
■ Somewhat safe    ■ Very Safe

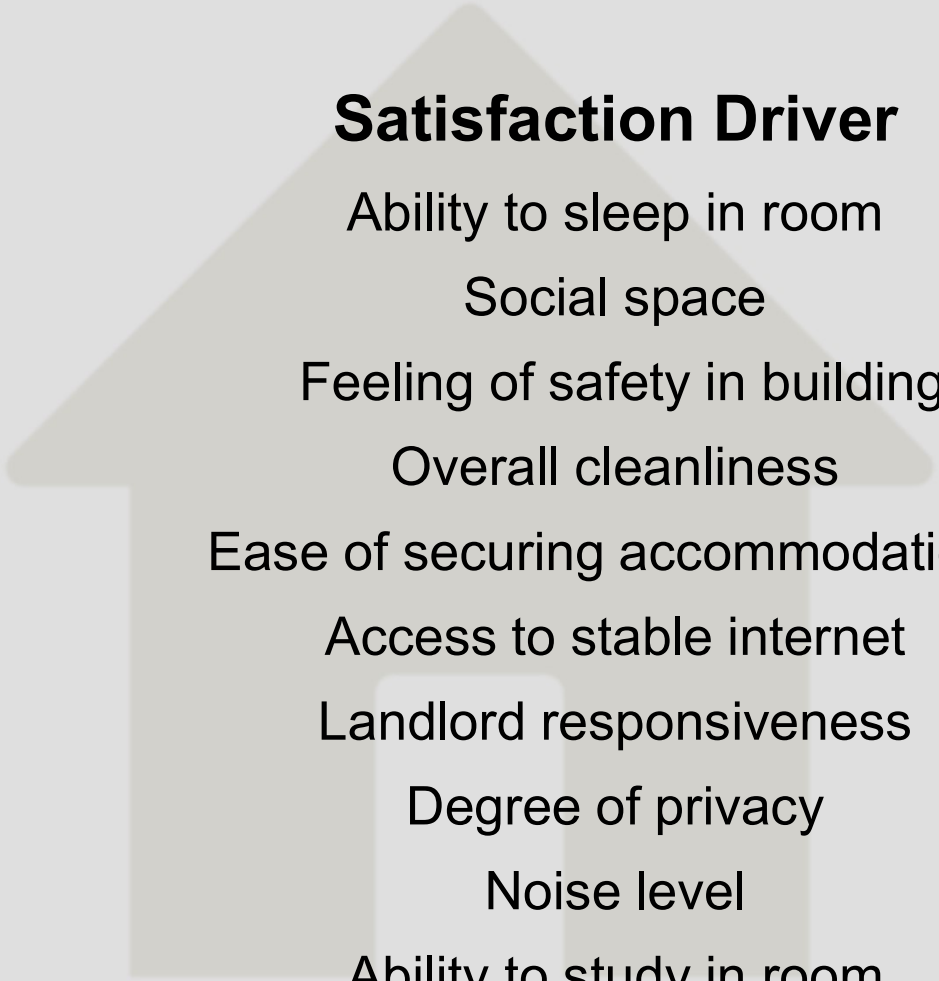
Community Safety (nighttime)



■ Not safe at all    ■ Somewhat unsafe  
■ Somewhat safe    ■ Very Safe



# Drivers of Satisfaction



Rank	Satisfaction Driver
1	Ability to sleep in room
2	Social space
3	Feeling of safety in building
4	Overall cleanliness
5	Ease of securing accommodations
6	Access to stable internet
7	Landlord responsiveness
8	Degree of privacy
9	Noise level
10	Ability to study in room

# Average Rent Per Month

2014 \$601.17

2016 \$594.68

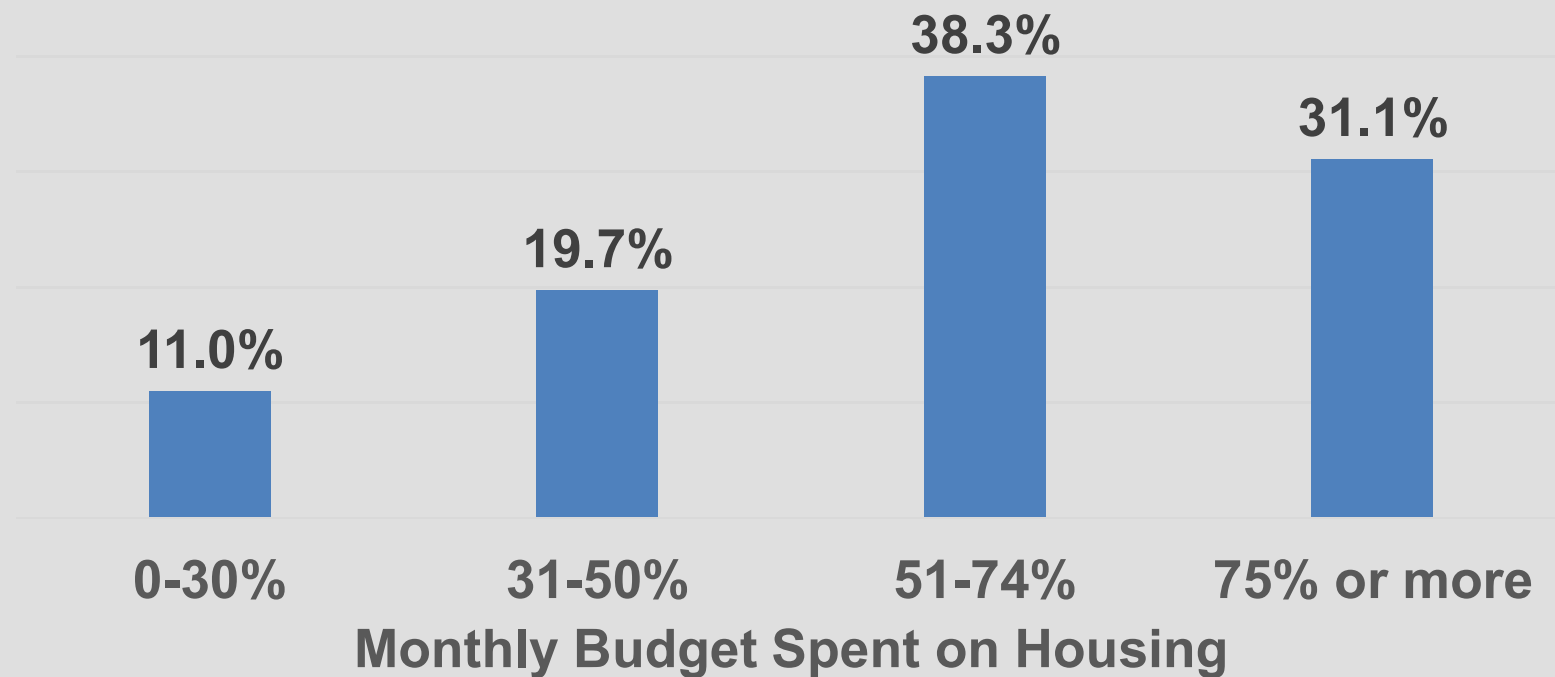


**\$950.38\***

\*includes utilities and internet

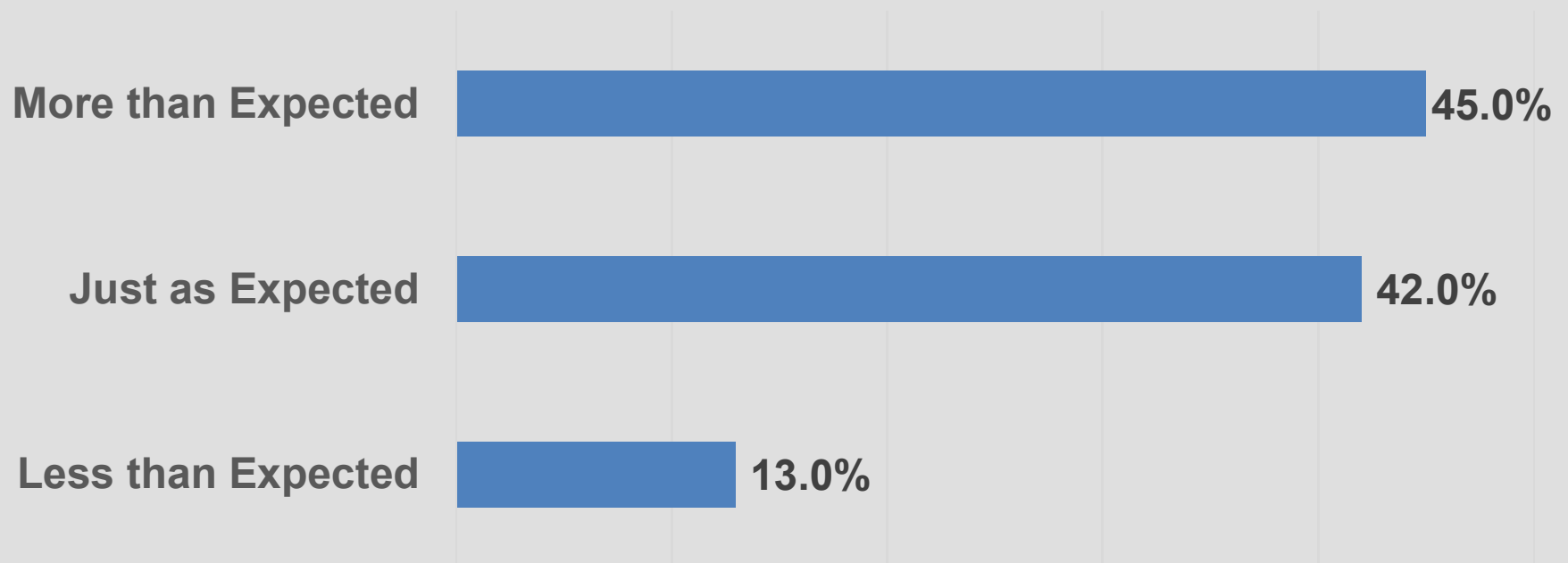
# Housing Budget

- Proportion of monthly budget going towards housing (e.g., rent, utilities, parking)?

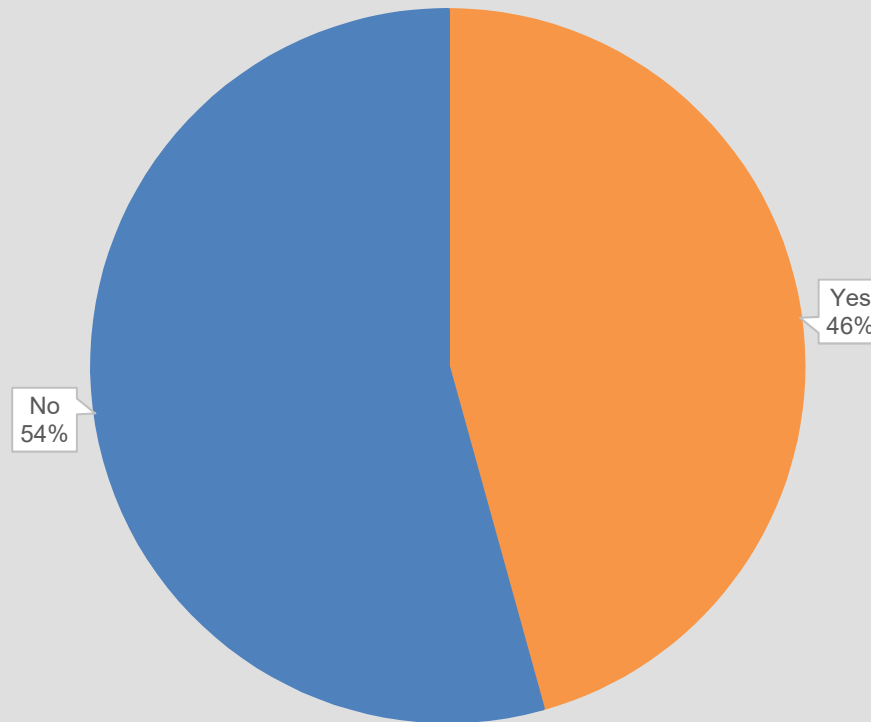


# Expenses v. Expectations

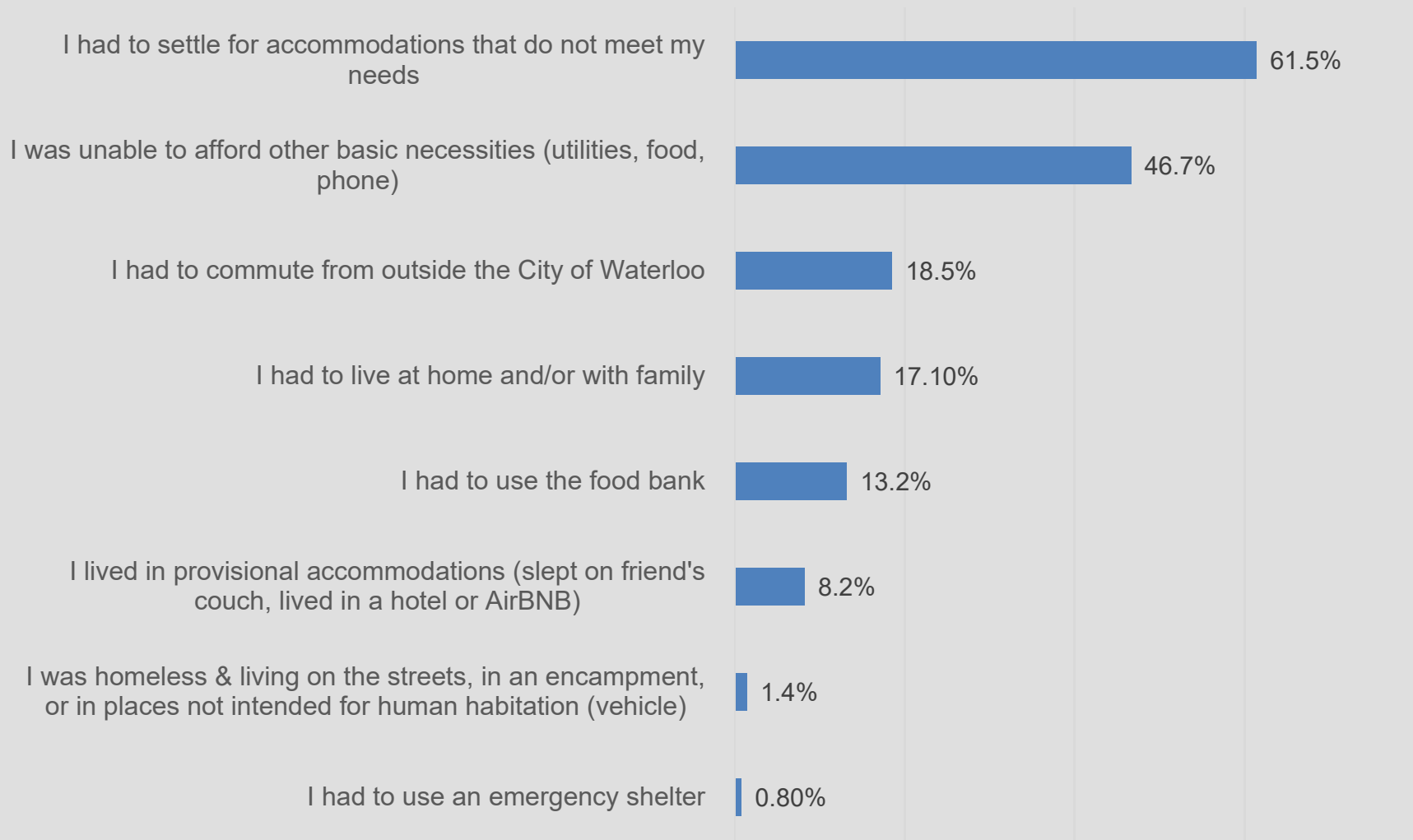
- Living expenses compared to expectations



# Significantly Impacted by Housing Costs Past Year



# Impact of Housing Costs



# In Summary

- There is a deficit of beds and additional considerations are exacerbating challenges
- Potential 4,660 additional beds coming down stream
- Significant work done to minimize data limitations identified in previous studies
- Student housing survey had 4,248 student responses
  - Majority of students were satisfied with their housing
  - Most (63%) found it difficult to secure housing
  - Many (45%) had living expenses more than they expected
- Accommodation costs are impacting students and they are increasingly finding it difficult to secure accommodations that meet their needs

# Next Steps

- Five total next steps
  - Intended to carry forward this work, activate resources through the Town & Gown Committee stakeholders, and develop tangible initiatives to address emerging student accommodation needs.
  - Based on supply-demand analysis and survey responses.



# Next Steps

1. Create public awareness regarding the work accomplished by the Town and Gown Student Accommodations Working Group.
2. Share the information with the Region, area municipalities, and municipalities where a significant number of students attending their post-secondary institutions are residing in Waterloo.

# Next Steps

3. Encourage the City to review the near-campus neighbourhoods for additional rental supply capacity and a mix of units as part of the Official Plan Review as well as opportunities for more attainable and affordable accommodations in line with the City's Affordable Housing Strategy.
4. Develop an understanding of the market conditions in the near-campus areas, specifically to understand to what extent student dominated areas are seeing non-student tenants reside in those buildings/areas.

# Next Steps

5. Continually develop collaborative education campaigns with all institutions using similar key messages and resources for new student tenants. This could include sharing resources, material, or other educational materials.

**Thank you**