Recommendation:
That Council endorse report CTTEE2017-004 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 and volunteer programs, recreational and cultural events, health and safety, and academic outreach.

Starting in Fall 2016, the Committee’s Student Housing 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 2014 supply-demand work and doing another student housing survey. The attached presentation highlights the main findings from this work as well as next steps.

The Student Housing Working Group consisted of:
Ryan King, University of Waterloo (Chair)
Tanja Curic, City of Waterloo
Shamir Mehta, City of Waterloo

Prepared By: Ryan King
Sub-committee Chair Signature: 
Date: 

Prepared By: Tanja Curic
Sub-committee Member Signature: 
Date: 

Report #: CTTEE2017-004
Virgil Martin and Tristan Wilkin, Region of Waterloo
James Craig, CBRE Limited
Antonio Brieva and Jennifer Chen, University of Waterloo Federation of Students
Phil Marfisi and Shannon Kelly, Wilfrid Laurier University Students’ Union
Brenda Cassidy, Conestoga College

Financial Implications:
None

Technological Implications:
None

Legal Considerations:
The Committee did not seek legal advice.

Link to the Strategic Plan:
The Town and Gown Committee’s student accommodations work supports Council’s strategic imperative of informing, engaging, and collaborating with others.
Waterloo Town and Gown Committee
Student Housing Working Group
October 16, 2017 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.

- 2011 Strategic Review created a renewed mission, mandate, and governance structure creating more collaborative opportunities.
Approach

- Second review (2014) on student accommodations in Waterloo
- Understand the supply-demand dynamics that impact student accommodations in Waterloo.
- Analysis to understand expectations and satisfaction drivers for student accommodations (survey).
Supply and Demand Analysis

- Focus of this work has been to minimize the number of limitations identified in the 2014 study.
  - Low-density rental numbers are citywide
    - Not all being rented by students & not all low rise rentals are licensed
  - Multi-residential beds outside catchment area and prior to 2000 are not included
    - Beds not tracked in BP system prior to mid-2008
## Student Housing Demand

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Undergraduate Enrolment</td>
<td># Full-time UG students at UW and WLU Waterloo campuses as of Nov. 2016</td>
<td>36,264</td>
</tr>
<tr>
<td>Total Graduate Enrolment</td>
<td># Full-time Grad students at UW and WLU Waterloo campuses as of Nov. 2016</td>
<td>+4,899</td>
</tr>
<tr>
<td>Local Co-op Work Term Students</td>
<td># students working within driving distance</td>
<td>+1,506</td>
</tr>
<tr>
<td>Non-tenant/Commuter Waterloo Students</td>
<td># students not renting in city, residing at home or traveling to campus</td>
<td>-10,291</td>
</tr>
<tr>
<td>Total Potential Student Tenants</td>
<td># total Waterloo students less non-tenant/commuter students</td>
<td>32,378</td>
</tr>
<tr>
<td>Total Potential Off-Campus Tenants</td>
<td># total potential student tenants less on-campus beds</td>
<td>23,397</td>
</tr>
</tbody>
</table>
## Student Housing Supply

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-Campus Beds</td>
<td># beds available on-campus in Waterloo as of Nov. 2016</td>
<td>8,981</td>
</tr>
<tr>
<td>Low-density Licensed Rentals</td>
<td># beds in low density licensed rental units</td>
<td>+6,946</td>
</tr>
<tr>
<td>Multi-Residential Beds</td>
<td># beds in multi-residential buildings in catchment area as of Nov. 15, 2016</td>
<td>+16,175</td>
</tr>
<tr>
<td>Traditional Apartment Beds</td>
<td># beds in traditional apartments</td>
<td>+1,336</td>
</tr>
<tr>
<td>Total Rental Beds Available</td>
<td># on- and off-campus beds</td>
<td>33,438</td>
</tr>
<tr>
<td>Total Off-Campus Beds</td>
<td># total rental beds available less on-campus beds</td>
<td>24,457</td>
</tr>
</tbody>
</table>
Result

Potential surplus of housing beds

+1,060*

*see data limitations*
Data Limitations

• Low-density rental licensing number generated by averaging two figures:
  • 1. Counted 90% of licensed beds in catchment area and 25% beds outside catchment area
  • 2. CBRE Limited analysis figure
    – Not all low rise rentals are licensed

• Multi-residential beds outside catchment area are not included and those prior to 2000 appear to be undercounted

• Traditional apartment beds appear to be undercounted

• Exact % of non-tenant/commuter Waterloo students not known

• Does not include potential future beds coming down stream
## Coming Down Stream

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-Campus Beds</td>
<td># on-campus beds proposed to be built by institutions</td>
<td>634</td>
</tr>
<tr>
<td>Multi-Residential Beds</td>
<td># beds in multi-residential buildings that have received building permits but were not constructed or occupied by November 15, 2016</td>
<td>+2,682</td>
</tr>
<tr>
<td>Site Plan and Zone Change Application Beds</td>
<td># proposed beds identified in formal site plans and zone change applications as of Nov. 15, 2016</td>
<td>+3,575</td>
</tr>
<tr>
<td>Rental Licensing Applications Under Review Beds</td>
<td># beds in rental licensing applications under review as of February 16, 2017</td>
<td>+223</td>
</tr>
<tr>
<td>Total Potential Future On- and Off-Campus Beds</td>
<td># proposed on- and off-campus beds</td>
<td>7,114</td>
</tr>
</tbody>
</table>
Student Housing Survey

• Online survey to gather insights from students was imperative
  – Expectations, satisfaction and experiences
• Student unions and associations helped to promote and engage with students to complete this survey

6,692
Student responses
Student Experiences

• Student distribution
  – 86.4% of students live within 1-5 km from campus

• Overall satisfaction
  – 81.4% are satisfied/highly satisfied with current housing

• Reason for choosing where they live
  – Price, Cleanliness, Proximity to Campus, and Privacy.
    • Note: Cleanliness has been seen as increasingly important over the last few years
## Findings

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live in an apartment building</td>
<td>36.8%</td>
<td>41.2%</td>
</tr>
<tr>
<td>Found it difficult to secure housing</td>
<td>35%</td>
<td>28.7%</td>
</tr>
<tr>
<td>Agree that their expectations were met</td>
<td>74.7%</td>
<td>75.7%</td>
</tr>
<tr>
<td>Average rent per month</td>
<td>$601.17</td>
<td>$594.68</td>
</tr>
<tr>
<td>Were not aware of rental licensing</td>
<td>61.7%</td>
<td>58.9%</td>
</tr>
<tr>
<td>Living expenses as expected</td>
<td>55.9%</td>
<td>61.5%</td>
</tr>
<tr>
<td>Improved sense of community belonging</td>
<td>66.7%</td>
<td>67.3%</td>
</tr>
</tbody>
</table>
Student Housing Survey Responses by Postal Code

Student Distribution
Student Safety

• Do you feel safe on campus (%)?

**Campus Safety (daytime)**

- Not safe at all: 12.7%
- Somewhat unsafe: 38.5%
- Somewhat safe: 1.8%
- Very safe: 83.4%

**Campus Safety (nighttime)**

- Not safe at all: 11.2%
- Somewhat unsafe: 48.5%
- Somewhat safe: 1.1%
- Very safe: 38.5%

Results: New for 2016
Student Safety

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

Results: New for 2016
## Drivers of Satisfaction

<table>
<thead>
<tr>
<th>Rank</th>
<th>Satisfaction Driver</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Number of roommates</td>
</tr>
<tr>
<td>2.</td>
<td>Ability to sleep in room</td>
</tr>
<tr>
<td>3.</td>
<td>Ability to study</td>
</tr>
<tr>
<td>4.</td>
<td>Feeling of safety</td>
</tr>
<tr>
<td>5.</td>
<td>Rent amount as expected</td>
</tr>
<tr>
<td>6.</td>
<td>Awareness of laws/by-laws</td>
</tr>
<tr>
<td>7.</td>
<td>Landlord responsiveness</td>
</tr>
<tr>
<td>8.</td>
<td>Ease of securing accommodations</td>
</tr>
</tbody>
</table>
In Summary

• Potential surplus of 1,060 beds
• Another 7,114 beds potentially coming down stream
• Significant work done to minimize data limitations identified in the 2014 study
• Student housing survey had a record 6,692 student responses
• 81.4% of students were satisfied/highly satisfied with their current housing
• 86.4% of students lived within 1-5 km from campus
Next Steps

• Six 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 analysis of supply-demand study, survey responses, and open ended student responses.
Next Steps

1. Take a deeper analysis on safety data to determine what factors influence a student’s feeling of safety on-campus and in the community.

2. Include and engage Conestoga College students in the next analysis. The priority group is the Waterloo Campus with opportunities to engage all other campuses within the Waterloo Region.
Next Steps

3. Adjust future “Student Housing Surveys” to become “Student Community Experience Surveys” to include representatives from community safety (police and community services) and economic development (talent retention & attraction).

4. Gather a greater understanding on low-density rental accommodations. This would include a deeper analysis on the secondary rental market to ensure this market is understood.
Next Steps

5. Develop an understanding of the market conditions in the near campus areas; specifically to understand if student dominated areas are seeing non-student tenants reside in those buildings/areas.

6. 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