St. George Campus Residence Demand Analysis: Forecast 2020

Planning and Budget Office

March 22, 2013

Framework

- Forecast residence demand for the St. George Campus in 2020, using long range projections of enrolment and student mix. Recommend a target capacity based on projected demand.
- Estimate the total number of additional residence beds required to:
  - Meet the existing residence guarantee
  - Remain competitive in domestic and int'l markets
  - Maintain a balance of first- and upper-year residents

Current Residence Capacity

- Base capacity set at 2012 actuals (including Provostial incentive to open up additional first year beds)

Primarily Undergraduate	Spaces
Innis	329
Chestnut	1,091
New College	884
University College	748
Woodsworth	370
St Michael's	649
Trinity	448
Victoria	802
Total	**5,321**

Primarily Grad & 2^{nd} Entry	Spaces
Charles Street*	721
Graduate House	436
Total	**1,157**
St. George Total	**6,478**

Source: 2012-13 Facts & Figures

*Charles Street shows number units, not bed spaces

UNIVERSITY OF TORONTO

First Year Demand

- First year UG students are guaranteed a residence space provided they apply for residence by March 31st and have received and accepted an offer of admission by June 3rd
- First year undergraduate demand projections are based on recent residence demand rates per the U of T Admissions and Student Housing application data, Fall 2010 to 2012.
- Demand rate = proportion of students who would accept a residence space if available.

Enrolment Forecast

- Current enrolment plans for the St. George Campus include no growth in direct-entry undergraduate programs.
- The proportion of international students in direct-entry programs is projected to grow from 15.5% to 21.0%.
- Demand for residence is higher among international students (62.4%) than domestic students (38.2%), so the shift in international mix will result in higher demand for residence spaces.

UNIVERSITY OF TORONTO

First Year / Upper Year Balance

- Traditionally, 40% of spaces in undergraduate residences are reserved for upper year students, who act as role models and are valuable assets for student success.
- Enrolment growth has put pressure on this balance as more spaces are needed to meet the residence guarantee for first year students.
- Non-federated residences now reserve only 30% of spaces for upper year students, resulting in a weighted average of 34% upper year student residents across all undergraduate residences.

Second Entry and Graduate Student Demand

- Upper year, second entry, and graduate students represent 80% of the total student population.
- For purposes of this analysis, we assume second entry and graduate demand is equal to the proportion of these students actually living in residence, Fall 2010-Fall 2012.
- That is, to be as conservative as possible, we assume there is currently no unmet demand from this group. True demand is higher. For Fall 2012:
  - Graduate House had 302 applications that were not offered space
  - Family Housing (Charles Street) had 254 applicants cancel their application because they could be offered a unit by their desired move in date

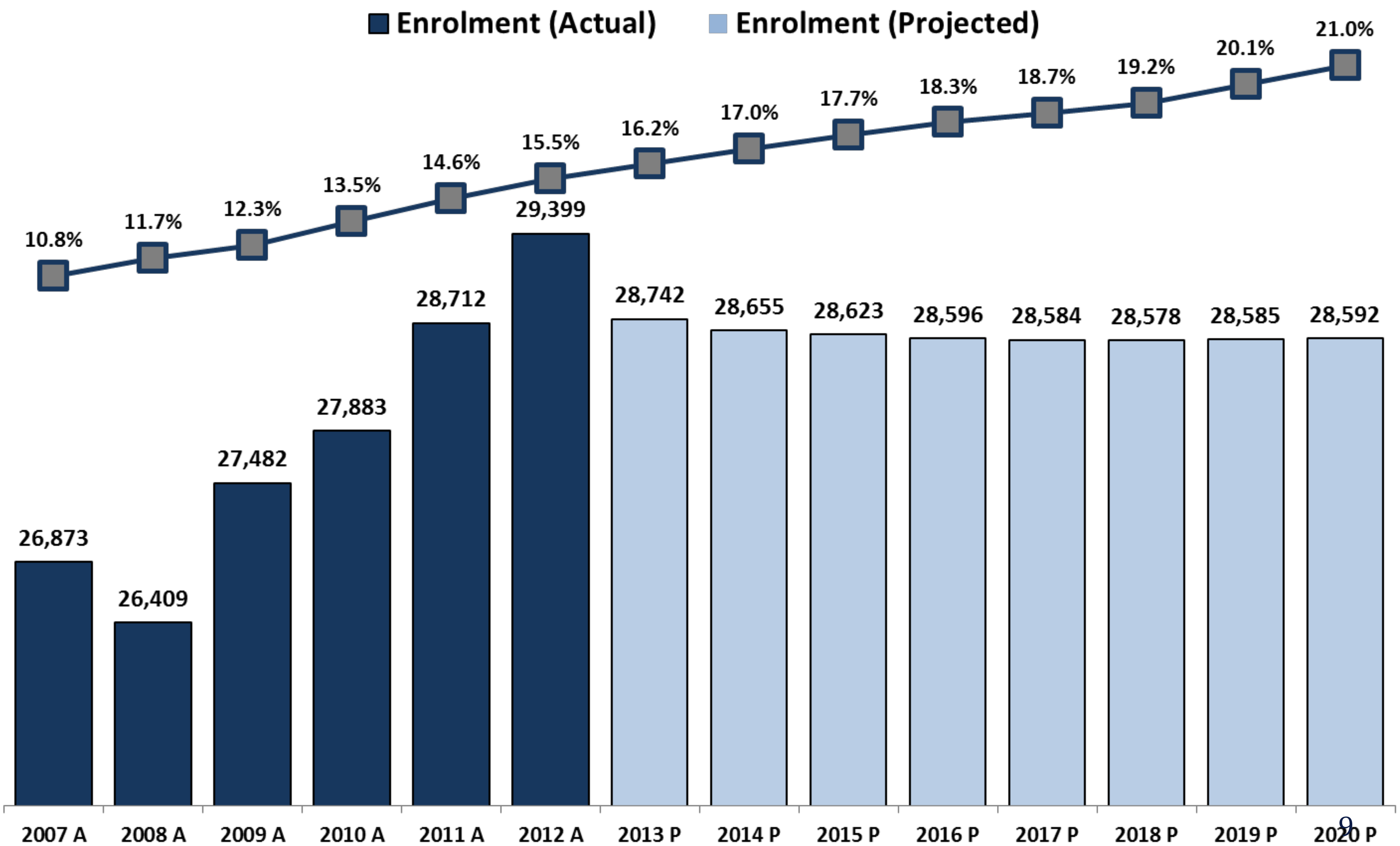
UNIVERSITY OF TORONTO

Summer Residence Business

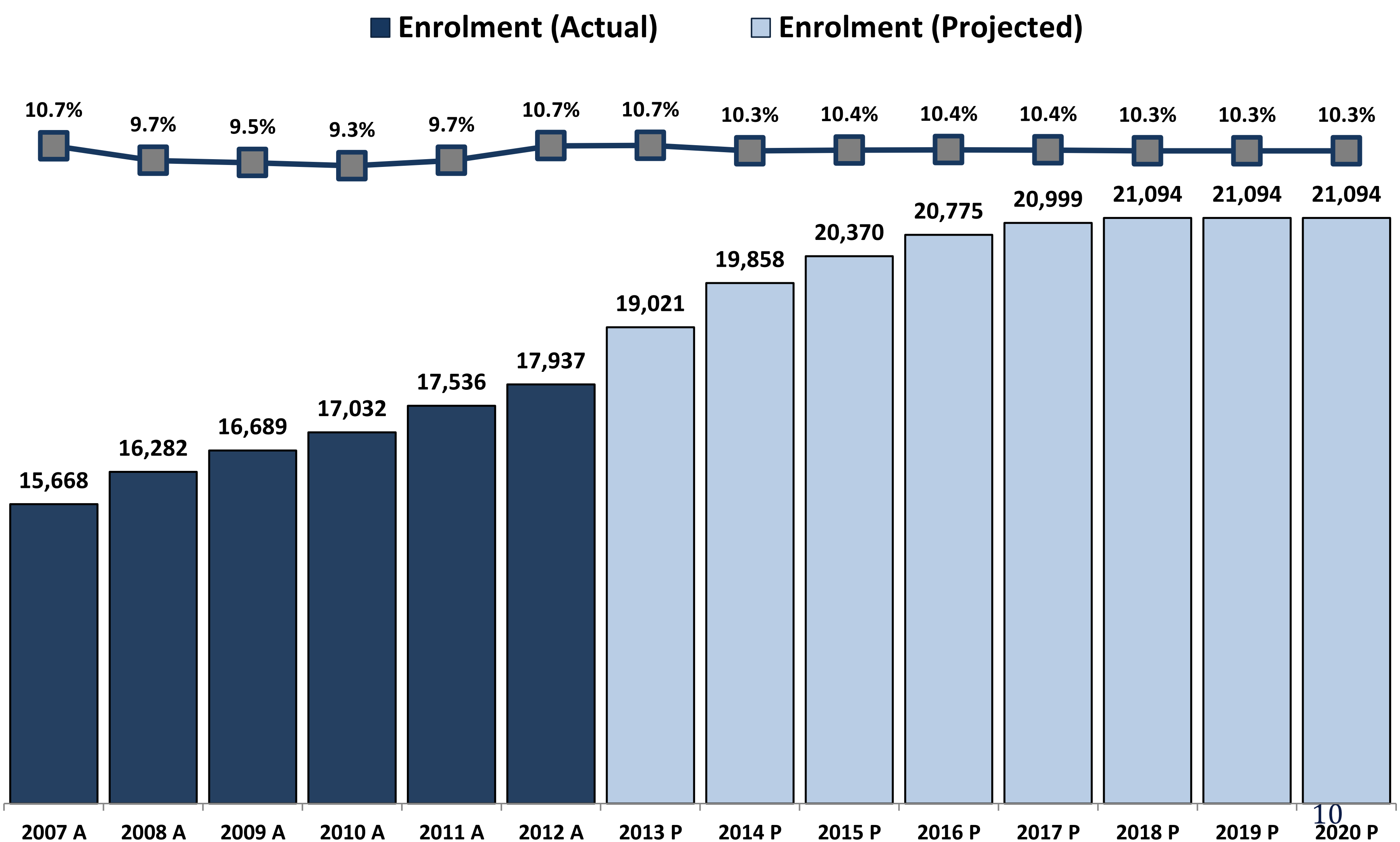
- Excess residence capacity on St. George campus currently during summer months
- Competitive conference service and student accommodation business between residences, as well as with broader Toronto hospitality industry
- Additional spaces would add to this over-capacity

UNIVERSITY OF TORONTO

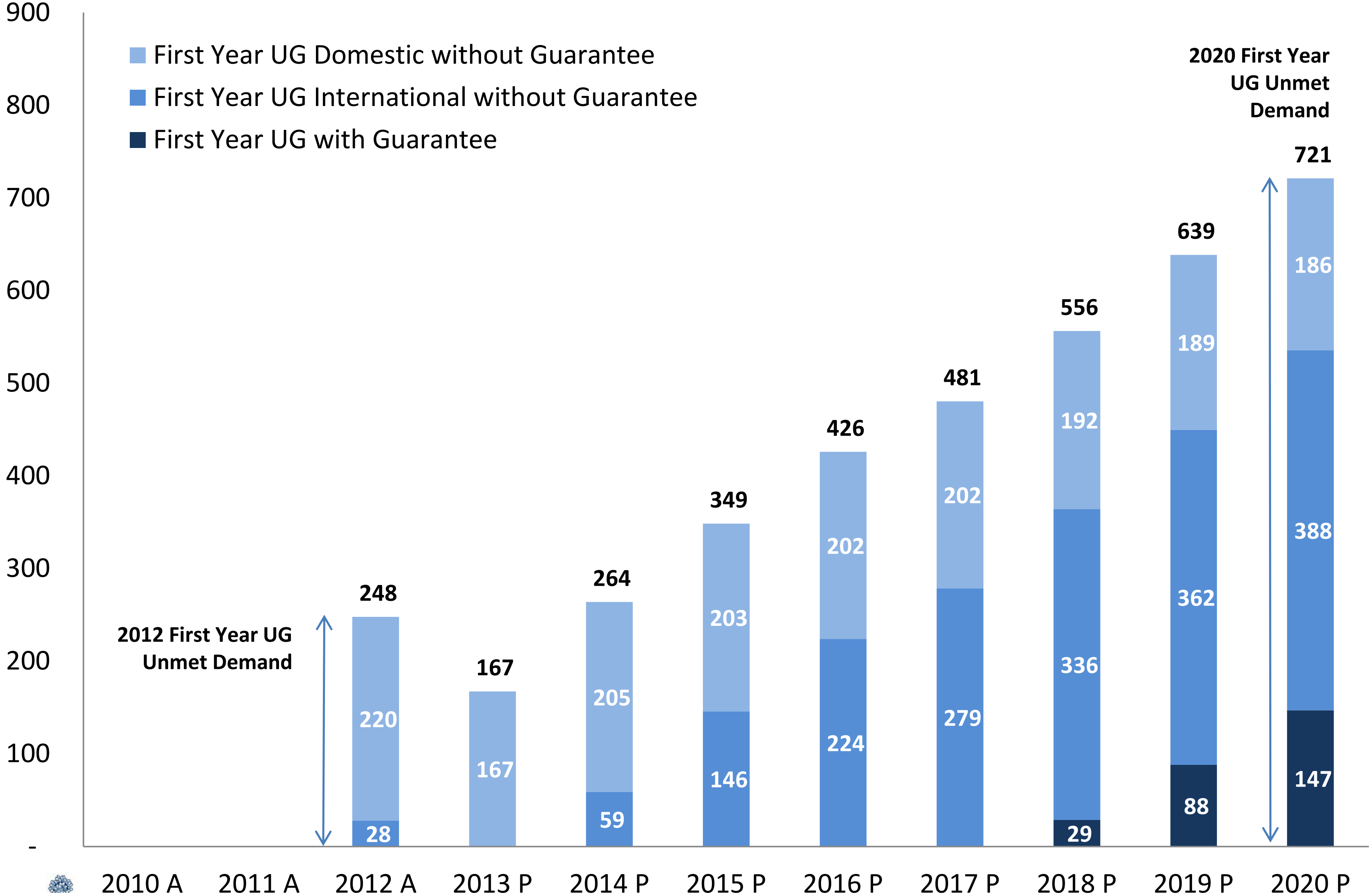
Direct-Entry Undergraduate Enrolment Projection with % International



Second-Entry UG and Graduate Enrolment Projection with % International

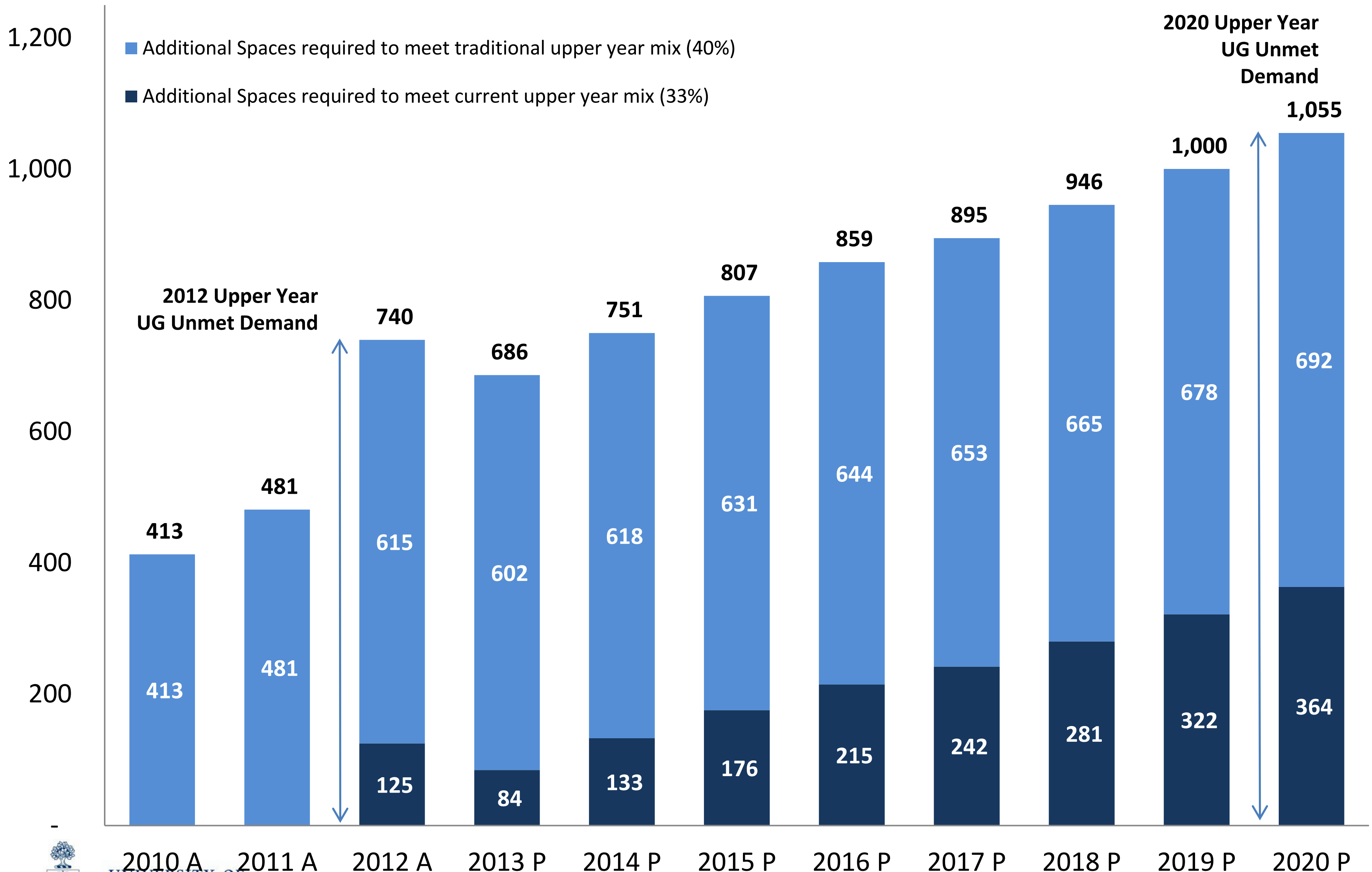


Unmet Demand for all First Year Undergradute Students
St. George Campus



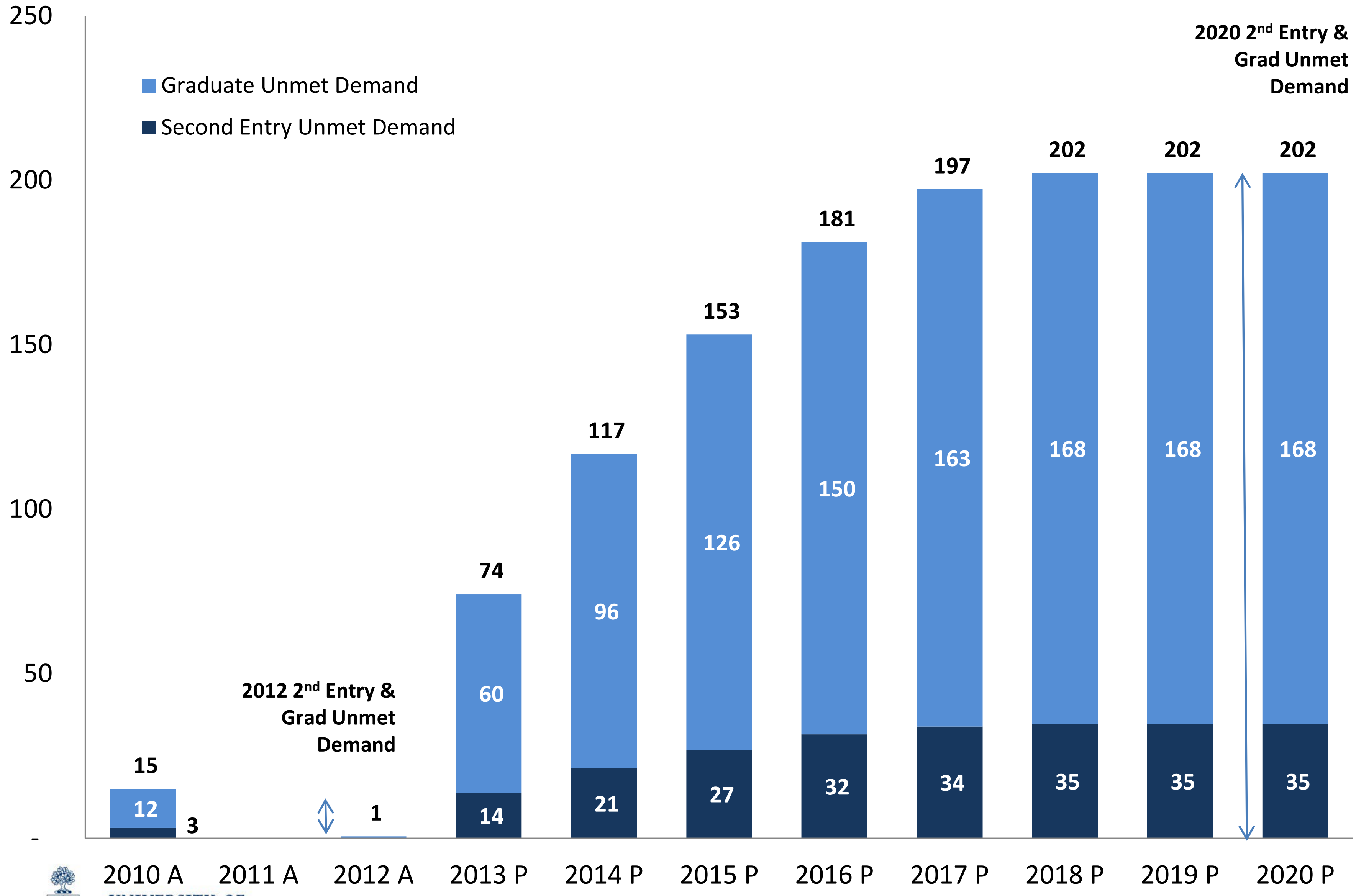
UNIVERSITY OF TORONTO

Unmet Demand for Upper Year Undergradute Students
St. George Campus



UNIVERSITY OF TORONTO

Unmet Demand for Second Entry and Graduate Students
St. George Campus

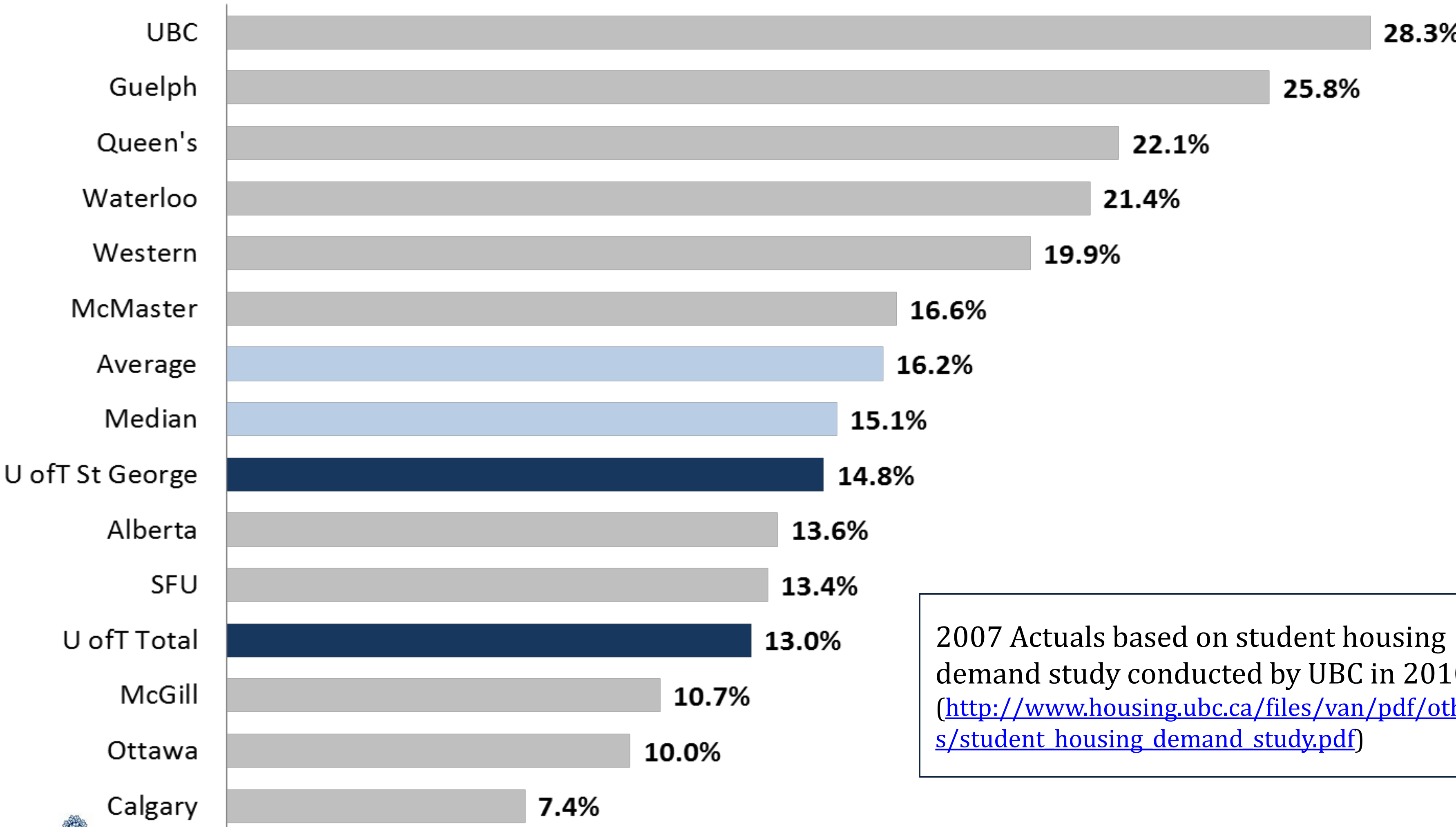


UNIVERSITY OF TORONTO

Recommendation

	Current Capacity	2020 Capacity	NEW BEDS		
			DOM	INT'L	TOTAL
First Year	3,537	4,258	419	302	721
Upper Year (33%)	1,784	2,147	273	91	364
Subtotal, UG Spaces @ 33% Upper Yr	**5,321**	**6,405**	**692**	**393**	**1,085**
Upper Year Balance increase to 40%		692	554	138	692
Subtotal, UG Spaces @ 40% Upper Yr	**5,321**	**7,097**	**1,246**	**531**	**1,777**
2nd Entry / Grad	1,157	1,359	139	63	202
TOTAL NEW RESIDENCE SPACES	**6,478**	**8,456**	**1,385**	**594**	**1,979**

Residence Capacity Peer Comparison



2007 Actuals based on student housing demand study conducted by UBC in 2010: (http://www.housing.ubc.ca/files/van/pdf/others/student_housing_demand_study.pdf)

UNIVERSITY OF TORONTO

UofT Residence Capacity as a % of Total Enrolment

		2020 Enrolment			
	Current	No New Beds	+ 1,085 Beds[1]	+ 1,287 Beds[2]	+ 1,979 Beds[3]
St George First Year UG	44.3%	44.2%	53.2%	53.2%	53.2%
St George Upper Year UG	8.8%	8.5%	10.3%	10.3%	13.6%
St George Second Entry	4.4%	4.0%	4.0%	4.7%	4.7%
St George Graduate	8.9%	6.0%	6.0%	7.0%	7.0%
Total: St George	14.8%	12.9%	15.1%	15.5%	16.9%

1) This scenario assumes upper year capacity 33% and no additional second entry and graduate spaces.

2) This scenario assumes upper year capacity at 33% and 202 additional second entry and graduate spaces.

3) This scenario assumes upper year capacity at 40%, and 202 additional second entry and graduates spaces.

UNIVERSITY OF TORONTO

Summary

- **RECOMMENDATION: 1,979 NEW SPACES including:**
  - **721 spaces** to meet projected first year demand from growing international population.
  - **1,056 spaces** to improve access for upper year students and restore the balance to 60% first year, 40% upper year.
  - **202 spaces** to meet enrolment growth-related demand from second entry and graduate students. This does not improve access to residence for this group.
- This recommendation will result in residence spaces for 13.6% of upper year undergraduates. Although upper year demand is likely higher than this (first year demand is 53%), projections were not done due to lack of comparators.