

scion



# Thompson Rivers University

KAMLOOPS, BRITISH COLUMBIA

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## Student Housing Market and Demand Analysis

**Table of Contents**

<b>Section 1</b>	<b>Introduction &amp; Executive Summary</b>	<b>page 1</b>
<b>Section 2</b>	<b>Observations &amp; Recommendations</b>	<b>page 4</b>
<b>Section 3</b>	<b>Student Housing Demand Analysis</b>	<b>page 8</b>
<b>Section 4</b>	<b>Overview of Current Conditions</b>	<b>page 15</b>
<b>Section 5</b>	<b>Overview of Off Campus Rental Housing Market</b>	<b>page 22</b>
<b>Section 6</b>	<b>Peer Institutions Review</b>	<b>Page 26</b>
<b>Section 7</b>	<b>Summary of Focus Group Sessions</b>	<b>page 32</b>
<b>Section 8</b>	<b>Summary of Stakeholder Interviews</b>	<b>Page 34</b>
<b>Appendix A</b>	<b>Rental Housing Market Property Detail</b>	<b>-</b>
<b>Appendix B</b>	<b>Student Survey</b>	<b>-</b>

**Tables**

Table 1: Student Status of Survey Respondents ..... 8

Table 2: Cohort Distribution of Survey Respondents..... 8

Table 3: Current Housing Situation of Survey Respondents..... 8

Table 4: Current and Projected Full-time Enrolment..... 9

Table 5: Maximum Demand Indicated..... 9

Table 6: TRU Housing Demand Projections ..... 11

Table 7: Residence Fees; 2016/17..... 21

Table 8: Adjusted Market Rental Rates..... 24

Table 9: Utility Adjustments ..... 24

Table 10: Peer Institution Review..... 31

Table 11: Student Focus Group Participants ..... 32

**Figures**

Figure 1: On Campus, Undergraduate and Graduate Enrolment - Current and Projections; Fall 2016-2021 ..... 15

Figure 2: On Campus, Domestic Students - Top 10 Cities of Origin; Fall 2016..... 16

Figure 3: On Campus, Domestic Students - Province of Origin; Fall 2016..... 16

Figure 4: Full-time Academic, International Students' Enrolment; 2000-2021..... 17

Figure 5: Full-time Academic, International Students' Duration of Study; Fall 2016 ..... 18

Figure 6: ITC Program Enrolment; 2014-2016..... 18

## Section 1: Introduction & Executive Summary

### Introduction

Thompson Rivers University (TRU) engaged The Scion Group Services, ULC (Scion) to complete a market and demand analysis for the student residences at its main campus in Kamloops, BC. This document, the *Student Housing Market and Demand Analysis*, describes Scion's observations and recommendations.

In preparing this report, Scion was asked to assess students' interests and preferences. Research included administering an online student survey; conducting student focus group sessions; interviewing University stakeholders; and examining the off campus rental housing market. The Scion Group appreciates the opportunity to have prepared this report and to assist Thompson Rivers University with this important project.

### Executive Summary

Scion has several observations regarding demand and preferences for student residences, which are included in the following summary. Notably, student demand is based on current market conditions and student perceptions. If, in the near future, a new student residence is achieved and students can actually experience it as a resident or guest, demand and preferences are likely to change and should be reassessed.

**Undergraduate enrolment for domestic and international students is projected to increase over the next five years by 444 students (from Fall 2017-Fall 2021) with graduate enrolment holding steady.** Strategic retention efforts will be made to eliminate obstacles such as social, academic, administrative, financial, etc. that may get in the way of students' success. **Academic growth is anticipated in the graduate programs though the enrolment projections indicate a steady state for now.** For the purposes of housing demand, any growth in non-local graduate students will grow demand beyond Scion's projections. Three new programs were added in the past few months and more are in the process for Ministry approval. **There is capacity for increase in the trades training programs as well.**

**International and aboriginal students' enrolment is continuously increasing** and demanding multi-culturally focused housing and dining options. Together, these cohorts currently **make up 40% of on campus student population.**

Analysis of student housing demand at TRU was completed for this report using enrolment projection data, information gathered from interviews and discussions on campus, market pricing and availability, market development, survey data and experience. Scion believes that there is some additional demand and based on the enrolment projections for Fall 2021, an additional 104 beds are in demand –

assuming McGill Residence is still in operation. **If McGill Residence is taken out of circulation, that demand equation rises to 448.** Scion has also made several notations through the report about additional items to consider when the time for deeper discussions and decisions related to student housing occurs at TRU. Included amongst these items are considerations around a higher than typical price sensitivity amongst large proportions of TRU students, Indigenous and International students, family housing potential and housing style suggestions to best reach the potential market.

An off campus market analysis was completed by Scion. The Kamloops housing market is growing with housing that is at least partially targeted to students and already contains several locations that cater to students even if they were not initially constructed to serve students. The new projects coming in just south of the campus seem targeted at a young professional and potentially student market. One project has been approved ([www.kamloopsthisweek.com/firm-sets-sights-adding-375-rental-units-across-university/](http://www.kamloopsthisweek.com/firm-sets-sights-adding-375-rental-units-across-university/)) and one is in process ([www.kamloopsthisweek.com/towers-planned-mcgill/](http://www.kamloopsthisweek.com/towers-planned-mcgill/)). These are consistent with other recently completed projects such as Summit Village Residences which are advertised as welcoming students though they are not solely targeted to students. Our analysis assumes the approved building will be built as approved at 1275 Dalhousie with 375 units and the potential project at 1021 McGill Road has 200 units. In many of these project styles, the housing is in studio, 1 and 2 bedroom apartments and with their typical price points they are unlikely to be more than 35% students. Many current and former motels cater to students along Summit Drive and Columbia Street with Upper College Heights and MacBeth Place being apartments that cater almost solely to students. As housing that is at least partially targeted to students continues to grow in the area of the university this will often lead to some of the “shadow market” rental units such as basement apartments and rooms within houses changing their target markets. **All of this housing shifting to areas in close proximity to the University campus will bring competition for the current and potentially future residences on campus** though the vacancy rate in Kamloops is extremely low.

Scion also completed a Peer Institutions Review of the four competitor institutions identified by the university. Reviews of the University of Lethbridge, the University of the Fraser Valley, the University of British Columbia – Okanogan and the University of Victoria were completed. A particular highlight of these reviews is the prevalence of Living Learning Communities in existence (at UBC-O and the University of Victoria) and in development (University of Lethbridge). This is a particular area to highlight for on-going discussion and planning at Thompson Rivers University. **Competitor institutions are finding success with these programs and such concepts have proven successful in general in the research literature.** Programs of this nature could be a successful part of the residence life system at TRU and, of course, can and should be planned to fit within TRU culture and matched to the academic strengths and trends at TRU.

**A total of 518 students responded to the online survey conducted by Scion.** About 94% of the respondents were full-time students. Close to 80% of the respondents were single students, without a spouse or any children. Undergraduate students were the major respondents (83%); graduate students followed by 11%. Almost 57% of the feedback came from off campus student renters; 17% from students living in residence; another 17% from students living with parents' or relatives. 18% of the respondents identified as international students while 11% as aboriginal students.

Scion conducted two focus group sessions involving a total of 20 students; one session with first and second year residence students and the other with off campus student renters. Whiteboard sessions also articulated conversations around residences and involved gathering quick feedback from 50-60 students on campus.

#### **Acknowledgments**

Scion would like to acknowledge those campus stakeholders who have participated in individual and group interviews, including the following:

Alan Shaver, President  
Baihua Chadwick, AVP International and CEO Global Operations  
Brandon deKreiger, Manager, Student Residence  
Christine Adam, Dean of Students  
Craig Engleson, Manager, Events, Activities & Housing TRU World  
Diana Skoglund, Director of Media Relations and Communications  
Dorys Crespín-Mueller, Executive Director, Integrated Planning and Effectiveness  
Finlay Sinclair, CEO, TRU Community Trust  
Glenn Read, Director of Ancillary Services  
Jacquetta Goy, Director, Risk Management Services  
Joanne Brown, Supervisor, Services for Aboriginal Students  
Matt Milovick, VP Admin & Finance  
Mike Bluhm, AVP Strategic Enrolment and University Registrar  
Paul Manhas, AVP Finance  
Sara Wolfe, Assistant Dean of Students  
TRUSU Executives  
Warren Asuchak, Director of Facilities

## Section 2: Observations & Recommendations

Based on a review of the findings and analysis contained in this report, Scion has developed considerations and recommendations for student residences at the TRU main campus. These recommendations are based on Scion's observations and analysis, conversations with University stakeholders, review of data, information provided by TRU and experience on dozens of similar campuses.

### McGill Residence

#### *Realities*

Scion's observations of the McGill Residence match to the general feedback of the institution. The building was not built to last and it does not appear to have been maintained to a high standard over the years. TRU administration, in collaboration with CLC, has begun to invest money into the building and has committed to further investment to maintain the building's operations for another 5-10 years. Given the need for student housing on the campus, especially at a lower price point, this is a wise investment to make the building more attractive and comfortable without getting too deep in major renovation. Without a formal facilities investigation, Scion's cursory observation of the building and its likely infrastructure needs would dictate that replacement would be a better investment than renovation should the need for space exist.

The staff from CLC are working hard to improve the intentional residence life in the building and utilize the improving spaces and they have plans in place for further improvement. In a relatively short time since taking over operation of the building, improvements have been seen in the professionalism of its operations.

#### *Concerns*

The primary concern for this building will surprise no one and is in progress to improve. Of concern is that the physical facility does not reflect positively on the university in its current state.

The second concern related to the McGill Residence is the need for it despite its condition. This building is currently rented at a price point that, based on student feedback through survey and discussion, is needed by a contingent of the student population in order for them to be able to live in residence.

*Recommendations*

Scion suggests the following with regards to the McGill Residence at Thompson Rivers University:

1. Continue with a strategic plan to improve the building. The priority areas (in addition to any critical systems issues) should be the improvement of the bedroom units and creation of space for students to come together to study and for community building. The current rooms, even after being improved, contain very little space to utilize for study. Re-purposing some of the current non-bedroom space for study will dramatically improve the usefulness of the building for students. The building's main lounge has already seen some significant improvement for use as a community building and gathering space for the students. Scion would recommend a focus on other available spaces in the building for conversion to space conducive for small group study.
2. As the planned improvements for the building continue, Scion would strongly recommend a budgeting structure that keeps the price point of the building at a level of differentiation from the TRU Residence large enough that it remains a more affordable option. Improvements to the building would be expected to boost the price to some degree and Scion recommends keeping a lower price point as part of the strategic considerations of building improvement.

TRU Residence*Realities*

On the [www.TRUResidence.ca](http://www.TRUResidence.ca) page, the banner photos on the pages listed as "home", "residence life" and "advantages" appear to be stock photos. Any opportunity to highlight such a beautiful place as the TRU campus and show TRU students should be utilized.

The building is beginning to look a bit dated in its colours and finishes. The facility in general appears to be in good shape and generally standing up well to its use over 10 years.

There is a relatively new General Manager in place at the building. By all indications from students, student staff and colleagues at TRU, this GM is making a positive impact with his working style, ideas, leadership and energy. Initial impressions of the intentional residence life programming and activities in the building is that they are improving in depth and breadth but they are coming back from a period of time where one of the primary motivations within residence life was battling against a party atmosphere. The proactive and intentional community building efforts seem; from impressions on tour, observations, feedback from students in person and via survey, to be in a developmental stage.



*Concerns*

The primary negative feedback from students included two items. First of all was related to the price. As the demand analysis will indicate, there is certainly the demand for residence of this type to keep the building filled or close to it as long as it is well-maintained and operated. There is no reason to doubt that this will not occur with CLC's collaborative relationship with TRU. The second issue is the guest policy specifically and rule enforcement in general. The guest policy was adjusted in response to the party atmosphere of the building which included people coming from off campus to party at the residence and coming in large quantities. The new policy limits the number of guests per person and has a capacity for the building as a whole. It also requires pre-registration for guests prior to a weekend night. It is well noted in survey and discussions that strict enforcement of the rules has been received with mixed reviews and the guest policy in particular is unwelcome by many.

*Recommendations*

In regards to the guest policy which was so frequently a point of discussion with the students, Scion would suggest striking a student-involved committee to address the issue. This collaborative committee can review the policy with an eye to boosting the student knowledge related to the reasoning behind the current policy, increasing student consultation in general and perhaps finding a solution to the problem that is equally successful with less negative impact. The negative impact is primarily one of retention and Scion is always concerned when barriers to retention exist as residence retention serves as an occupancy buffer in years when the first year population decreases and upper year students wanting to return to residence, to the degree they can be accommodated for space, often bring a maturity to the life of the residence.

Scion would also recommend examining the décor of the building. Currently, the colours in the halls, lounges, common spaces and rooms are quite dull. Strategically utilizing colour through paint, furniture and window coverings will do wonders to make the building more attractive at first sight. Students will usually personalize their own bedrooms and to some degree their lounges but it is not the students that need to brighten the rest of the building. Scion would also recommend continuing the current practice of space review and re-purposing when it appears to be of value. For example, some of the lounges have been converted to other purposes. Intentionally maintaining the practice of receiving student feedback about the building and what students want and need will prove valuable in keeping the building attractive to new and returning students.

Currently, the residence life intentional programming seems to be improving and more actively engaging the students. This should be assessed closely and the residence life team should be seek out campus partners to engage with the students in the residence with the campus partners also seeking connections to the residence. The energy and professionalism of the new GM at TRU

Residence is something that can be leveraged into getting the residence education possibilities fully engaged with the campus. That there was some degree of separation between student life and the residence came through during some of the interviews AND that there is a positive energy with relationships connected to the building and its new GM was also noticeable. Scion suggests that this is an opportunity to build residence education connections that will last and become part of the TRU culture which will lead them to lasting beyond any future staff changes.

### Section 3: Student Housing Demand Analysis

#### Demand Analysis and Related Data

Based on discussions with the TRU administrators, the following demand analysis considers single, full-time students attending classes at the Kamloops campus of TRU. Students enrolled part-time are not included in the assessment of demand because they are less likely to express interest and their priorities are sometimes incompatible with fostering a residential life program. Likewise, family students – those living with a spouse, partner or dependent child – are not considered in the initial demand analysis. There will be commentary related to this group later in the report. The initial focus is single, full-time student demand.

Scion’s research, which included the completion of an online survey to ascertain single student demand and preferences, student focus group sessions and interviews with TRU stakeholders, demonstrates that overall interest in student housing from this group is present with 23% indicating a strong interest and 44% replying “maybe” to new housing on campus. This becomes more interesting when you consider that only 17% of the responses were given by students currently living in residence. These numbers are certainly not strong enough on their own to consider additional housing however, they provide a starting point to get into more depth with the data available.

Undergraduate	Graduate	Law
83%	11%	7%

**Table 1: Student Status of Survey Respondents**

First Year	1-2 Years at TRU	3-4 Years at TRU	5+ Years at TRU
33%	28%	26%	12%

**Table 2: Cohort Distribution of Survey Respondents**

TRU Housing	Off Campus Rental	Family/Relative	HomeStay Program	Owned Housing
17%	57%	16%	2%	7%

**Table 3: Current Housing Situation of Survey Respondents**

Having received the data from the survey, Scion then begins the analysis by applying it to the enrolment data from TRU. Using the data provided by the Institutional Planning and Effectiveness team related to enrolment shown below, Scion can start to get into the real numbers of how many may be interested in new housing on campus and under what conditions.

Cohort	Origin	Year					
		Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021
UG	Canadian	5,097	5,107	5,140	5,193	5,273	5,230
	International	1,584	1,604	1,654	1,705	1,754	1,795
	<b>Total</b>	<b>6,681</b>	<b>6,711</b>	<b>6,794</b>	<b>6,898</b>	<b>7,029</b>	<b>7,155</b>
Graduate	Canadian	121	121	121	121	121	121
	International	166	166	166	166	166	166
	<b>Total</b>	<b>287</b>	<b>287</b>	<b>287</b>	<b>287</b>	<b>287</b>	<b>287</b>
<b>Grand Total</b>		<b>6,968</b>	<b>6,998</b>	<b>7,082</b>	<b>7,186</b>	<b>7,316</b>	<b>7,443</b>

**Table 4: Current and Projected Full-time Enrolment**

The survey by Scion identifies 23% being strongly interested in new student housing and another 44% expressing a level of interest. A survey sent from TRU, the Canadian University Student Consortium survey, gave results that are similar with 18% of Canadian first year students and 40% of first year International students wanting to live in student housing if they had a choice. The middle year students showing 12% and 37% respectively and graduating students showing 11% and 28% respectively. Given the relative proportions of Canadian and International students at TRU, this gives some consistency to this data about how many TRU students would live on campus if they had their preference and might be interested in new housing on campus.

Housing Interest Level	Fall 2018	Fall 2021	Net New Housing - Fall 2021
<b>Strong Interest – UG</b>	1,553	1,646	774
<b>Strong Interest - Grad</b>	66	66	66

**Table 5: Maximum Demand Indicated**

As in the name of *Table 5*, these numbers show the maximum demand based on strong interest in new housing on campus and subtracting the current housing stock from the Fall 2021 projected enrolment. Such a number should be considered the maximum possible demand for new housing (with McGill Residence existing) and the calculations shown below will adjust this number down to a more refined recommendation. TRU has several factors that impact demand in a fashion that will create a lower recommendation.

- Enrolment is heavily skewed towards those from Kamloops and the nearby area.
- Students seem comfortable driving from 45 minutes away or more and this matches the travel culture in the area.
- **TRU students express cost concerns at a higher level than many institutions.** Cost sensitivity is a valid and important issue not to be ignored and the likely cost of a future housing project, even with relatively lower cost options is unlikely to reach the levels that significant numbers of students who would indicate interest in student housing on campus need. **Regardless of expressed interest, Scion believes that a high proportion of students will choose lower priced options than the campus is able to provide.**
- **New housing projects** in the vicinity of the campus are progressing and will provide options that are within a very short walk of campus and are likely to be at least competitive if not lower priced than the current TRU-Residence Tower. Such projects are likely to draw upper year students away from campus choices if the price is better.
- There is **VERY little interest from students in sharing bedrooms** in order to save money and when there is interest, it only begins at a level of saving \$200/month over a single bedroom. This savings level is approximately 50% more than the typical savings in taking a double bedroom option over a single bedroom option (other room qualities being equal).
- **Room options that do not contain a kitchen or kitchenette bring little interest from the students at TRU.** This matches feedback from the students who cite lack of their own cooking facilities as one of the primary reasons for leaving the campus residences. It also matches trends across Canada and the cost sensitivity shown in general from TRU students.
- Consistently, there was between 28% and 43% of respondents, when being asked about different housing styles at various price points, indicating “no interest regardless of cost” for each style and it should be noted that respondents being asked these questions included only those who had indicated an interest in new student housing in an earlier question. **These figures emphasize the cost sensitivity around new housing.**

Other factors of note from the survey:

- 36% of students indicated that a 12 month residence contract would be desirable if a 5-10% discount from the academic year length contract were available.
- 26% of students placed a \$50-75/month premium on having a private bathroom.
- There was an equal split between respondents who indicated a preference for a meal plan or no meal plan. This gives some weight to the idea of including consideration of flexibility of options related to meal plans in a new situation.
- The offer of no rent increase for returning students was indicated as making 59% of respondents very likely to return to residence and 24% somewhat likely to return. This should be considered if retaining students becomes an issue of need in the current residence

situation as well as into the future.

- The **rent range per person** (including all utilities and internet) of students living off campus in rental housing was \$450/month - \$2000/month with the **median being \$600/month with a standard deviation of \$252/month**. Scion considers the median to be more reflective of the student housing market in this situation as there are some very high outliers in the current market that skew the average high. This matches discussions on campus with students and the general market information Scion observed. The median, with the new housing being constructed near the campus, is likely to rise over the next few years. However, as students who can afford those prices take some of the new units, the current lower priced options will become more available for those who need them from a financial perspective.

**Adjusted Population for Residence Consideration – using Fall 2018 and 2021 Enrolment Projections**

Cohort	Projections					
	Fall 2018 Projections of Available Population	Fall 2021 Projections of Available Population	Fall 2018 Projections for Housing Demand*	Fall 2021 Projections for Housing Demand*	Minimum Adjusted New Demand Fall 2018 (McGill Rez still exists) **	Max Adjusted New Demand Fall 2021 (McGill Rez still exists) **
CDN UG	1,387	1,447	277 (20%)	289 (20%)		
Int'l UG	1,654	1,795	578 (35%)	628 (35%)		
CDN Grad	121	121	18	18		
Int'l Grad	166	166	41	41		
<b>Grand Total</b>	<b>3,328</b>	<b>3,529</b>	<b>914</b>	<b>976</b>	<b>42</b>	<b>104</b>

**Table 6: TRU Housing Demand Projections**

\*Assumptions include available housing lines up with preferences from survey, discussions and market analysis. Specifically noting that new housing would be single bedrooms in some configuration, at least kitchenettes if not kitchens, and at least semi-private bathrooms.

\*\*New demand of 42-104 beds assumes that the 302 beds of McGill Residence still exist.

In planning, if McGill Residence is to be decommissioned, the new adjusted demand would include the current capacity of McGill Residence and thus be *344 – 448 beds* and growing if the campus continues to grow beyond the year 2021.

Scion is aware that the plan for the McGill Residence, due to its current condition, is not likely to go beyond a decade. Given that planning for a new residence would involve a timeline of approximately three years from planning to opening, using a **projected demand of 448 beds for a replacement building is a solid estimate for initial planning purposes**. Key factors that would be included in consideration as this timeline progresses include the following:

- The McGill Residence is at a price point that is approximately \$2400 less expensive over an academic year contract and TRU students show a distinct price sensitivity. **A housing style that best balances cost, private bedrooms, at least semi-private bathrooms, at least kitchenettes, and the potential option for an equivalent number of students to have the option of no meal plan should be considered.** It is unlikely that such a price differential for a new building could be maintained however this issue should be closely considered and an attempt at **maintaining some level of price differentiation is a worthy goal**. There are style options, using furniture or partial walls for example, that can **create the feel of a private bedroom while the room is actually a shared bedroom allowing for lower cost**. **Communal kitchens** for larger numbers of students to share with upgraded equipment can allow for higher levels of cooking opportunity and community building without having a kitchenette within a unit – these types of **communal kitchens are less expensive to provide than providing one per unit while also being more attractive than the typical basic “floor kitchen”** (see La Citadelle Residence at McGill University as an example). If it is not possible to maintain a price differentiation in new construction, Scion would suggest consideration of attempting to ensure lower cost options being included in any market development housing on the campus lands.
- Consultation with colleagues at UBC in Vancouver should be undertaken in a few years to examine the success of the “Nano Suite” that opens in Fall 2017. This is a more extreme model of very small units to reduce costs for students. There are other similar models with the same concept but not quite as small. This may be a lower cost option that could be worked into a section of a new building that still provides privacy and cooking ability.
- Close examination of **potential demographic changes** in the TRU student body over time should be given as housing plans are considered. Current projections include goals of expanding the number of students from beyond the Kamloops area which would be likely to increase demand for housing. If this non-local group grows at a faster pace than anticipated, demand is likely to be higher. Conversely, if the group of students from the Kamloops area makes up a larger proportion of campus growth than planned, the demand will be less.
- **International student populations** are projected to grow and this community and its related university stakeholders expressed concern over the current meal plan limitations for this population. This issue is also raised in discussions related to the growing International Training Centre (ITC) program and its need for housing options. Having the needed meal

plan flexibility, across the housing system, should be considered for these populations. Including cooking facilities, in room or communal kitchens should be considered in any new build. ITC's growth seems focused on the summer. As the program grows, the feasibility of a meal plan will become possible. Discussions with these groups about what type of meal plan would be desired, and purchased, would be valuable.

- Growth in the **Indigenous student population** is anticipated and this group is under represented in residence relative to the campus population. Efforts to communicate, using the assistance of the advisors, with those connected to Band Funding for those Bands that often send students to TRU would be a wise move. Often Band Funding comes at a pace and timeline that does not easily match to the typical residence application process however the funding is present. **Some advance work with the organizations can develop a system whereby more Indigenous students can take advantage of residence which will also benefit the whole residence system.** Consults with this group specifically is also suggested when the time comes to consider future housing options around issues of price point, amenities and potential indigenization of a residence (example: creating a space for smudging and other ceremonies – for many other cultures as well – that will not trigger fire alarms). So many of these students (and this is not specific to only TRU for this population) are facing significant financial and social stresses to be university students and a more appropriate housing situation would go far to bring them into the TRU community as a whole as well as the Aboriginal Student Services Centre community.
- **Growth in the graduate school programs** is anticipated in discussions however the stated projections call for a steady state without expansion. Should the growth in enrolment play out and the planned new programs arrive, there is very likely to be expanded demand in the graduate student population.
- The **growth in the trades program** may lead to a growth in housing needs however these groups are typically on campus for shorter periods of time. If their programs are spaced at predictable times through the year, it is **conceivable to plan for a rotation of students through the same rooms.**
- Scion would suggest that if a new building is being considered, it would be **wise to consider a variety of options within the building that could provide an equally updated and quality residence experience with different price point options.** Such an array of different options would also be conducive for creating a community that is less dominated by first year students and allow for more of a mix of cohorts including graduate students.
- Using a “stick” construction style rather than a “monumental” style more common to a university campus. Less expensive but high quality construction is becoming more relevant in student housing due to cost and lighter cost of eventual demolition and replacement rather than significant upkeep costs.



- Utilizing the coming “market” housing to include lower cost housing possibilities and then having a regulation process by which to ensure that such housing is kept at the appropriate cost levels and used to reach the students in need. There are many possible means by which to do this depending on the type of housing to be built and how it is to be distributed. Keeping some units aside, or sub-units, for lower income students and having a process by which to ensure it goes to these students would be an administrative load but should be manageable with significant benefit to students that need the access. There is little doubt that the development of the trust lands have drawn significant attention and some level of wariness. It may be worth considering the possibilities of using some degree of this development to provide housing that can be reserved for those in severe financial need and kept at a lower cost. The symbolic positives of such an effort may prove valuable in the implementation of the whole of the project.

#### **Housing Demand for Family and Partner Relationships**

There is a need for housing amongst some of the TRU students that are involved in partnered relationships and/or having children in the family. At the same time, discussions with students, staff member supports and survey data indicate the **population is relatively small and often price sensitive to an even higher degree than the full-time single students**. Without using subsidies, the situation for campus-based family housing is likely to be one wherein the university cannot feasibly build anything of quality that the students in this situation could afford to rent on campus. Scion believes that the most effective efforts related to housing for these populations would be for TRU to work with the local community for better and closer access to affordable housing. In addition, **the potential for some availability of subsidized housing for qualified students in a market housing situation on campus may be worth pursuing as the university considers plans for future development**. Anything that can be done to bring these students (those from away from Kamloops) closer to the campus will be a boon for the campus and these students so that they can feel more a part of the campus community. The size and need for such populations may evolve over the next decade as well.

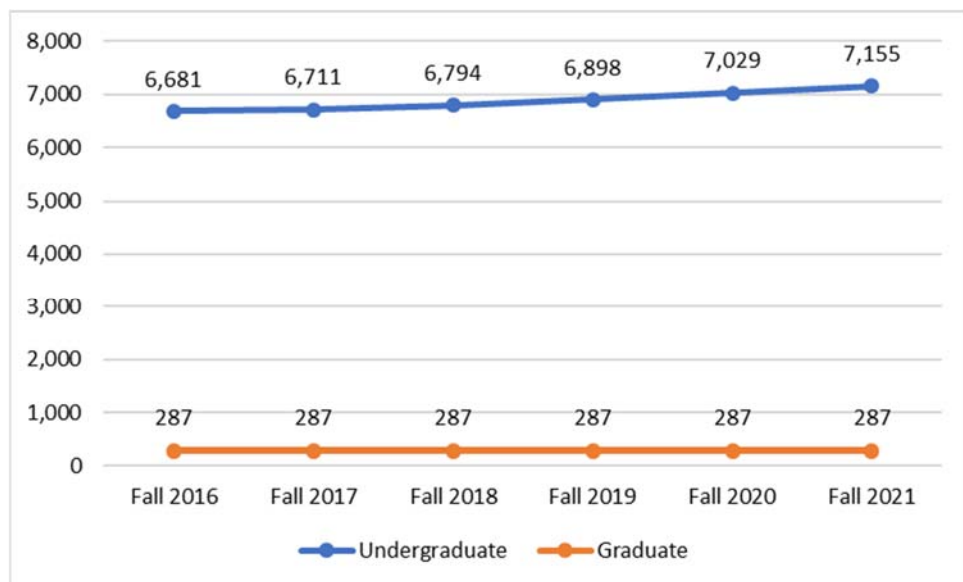
#### **Marketing and Advertising of Student Housing**

Scion noticed situations that we would recommend addressing with some of the current off campus housing providers. Currently, there are locations that are not affiliated with TRU but advertise themselves as TRU student housing in a fashion that would lead one to believe that they are campus housing and likely have some affiliation with the campus. This can usually be corrected with a phone call to the owner/manager and Scion would recommend doing so before discussions on new housing on campus occur. As more housing is constructed in the area of the campus creating more competition for off campus providers, this issue will need more regular checking.

**Section 4: Overview of Current Conditions**

**Enrolment**

According to the enrolment data provided by TRU, the graduate enrolment is expected to remain steady over the next few years while the undergraduate enrolment will increase by small margins. Based on stakeholder interviews, the number of graduate programs offered at TRU are expected to multiply – recently added three new graduate programs. Majority of the incline in undergraduate students stems from international students, a cohort expected to grow in population.



*Figure 1: On Campus, Undergraduate and Graduate Enrolment - Current and Projections; Fall 2016-2021*

Thompson Rivers University is currently in the process of developing a Strategic Enrolment Management Plan. The University will continue to make efforts in recruiting domestic students from outside the local regions. For Fall 2016, 35% of on campus domestic students originated from Kamloops, B.C. *Figure 2* below represents the proportion of on campus domestic students enrolled from the top ten cities of origin.

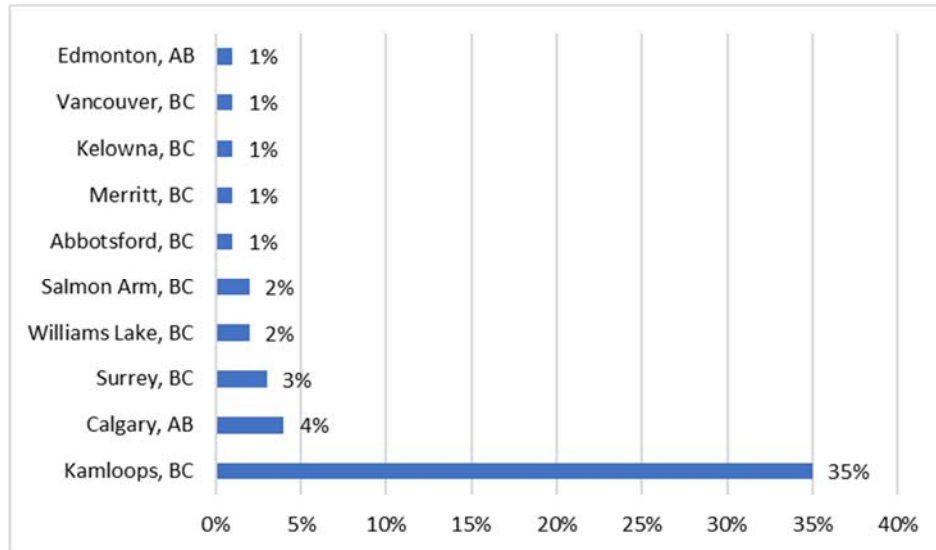


Figure 2: On Campus, Domestic Students - Top 10 Cities of Origin; Fall 2016

From a high-level analysis, 15% of on campus domestic students originated from outside of B.C. for the Fall 2016 intake. Enrolment based on province of origin is shown in Figure 3.

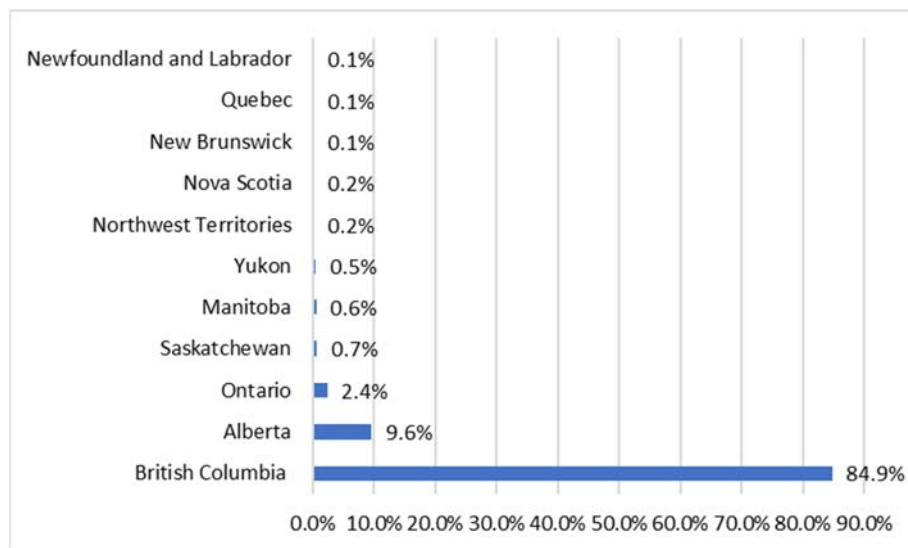
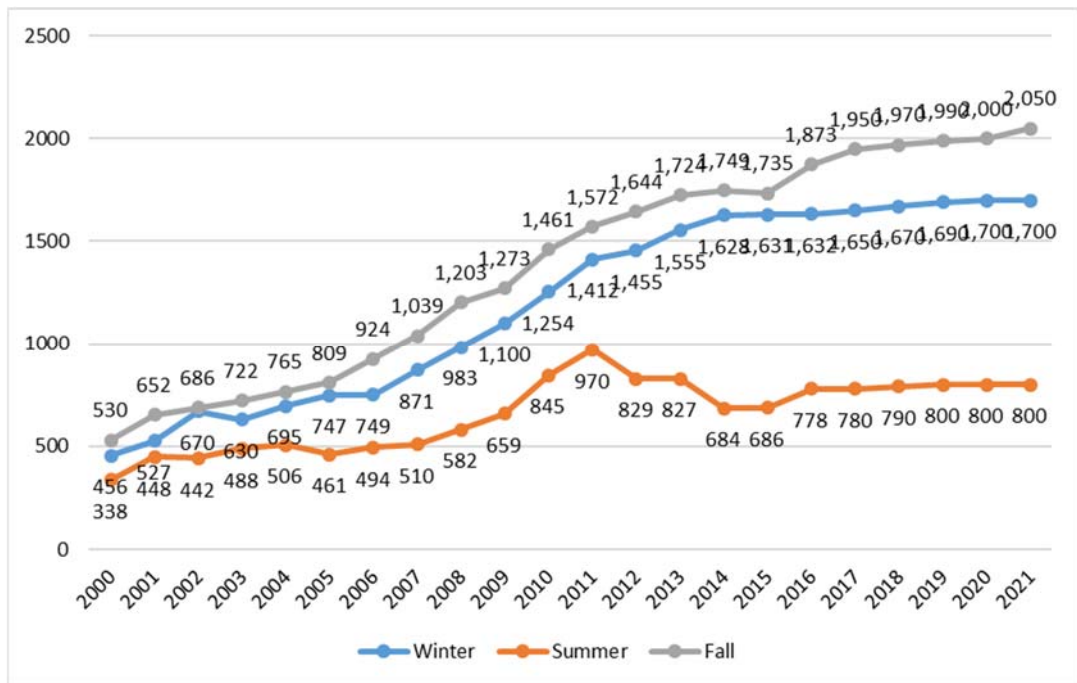


Figure 3: On Campus, Domestic Students - Province of Origin; Fall 2016

*International Students*

International students made up 24% of on campus students in Fall 2016. Currently TRU has 1,871 international academic degree seeking students, and another 1,000 varied term non-credit contract training students. As described by TRU coordinators, both cohorts require different housing needs during their period of study.

TRU World is the international education, training, and development division at the University. TRU World projects continued growth in international students' enrolment in the future. *Figure 4* shows the number of international students enrolled at TRU to study in full time academic programs. The highest enrolment semester is Fall (from September to December). The lowest enrolment semester is Summer (from May to August).



*Figure 4: Full-time Academic, International Students' Enrolment; 2000-2021*

Majority of the international students enrolled in the full-time academic programs stay for a duration of two to four years. *Figure 5* lists the international students enrolled in full-time academic programs and their intended study durations at TRU. One year or less is the duration for Certificate and Exchange programs, Diploma and Master programs are two years or longer and Degree programs last four years or longer.

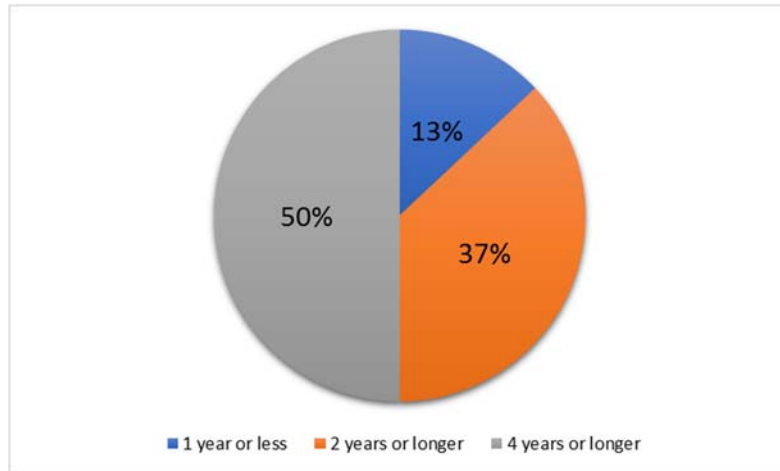


Figure 5: Full-time Academic, International Students' Duration of Study; Fall 2016

TRU World's International Training Center (ITC) program is unique as it creates specialized varied term, non-credit programs to students all around the world. Groups may come to TRU to study anywhere from one week to one year in duration and the demands of each program are customized to meet the needs of each client group. Figure 6 represents the number of students enrolled each year in the ITC program.

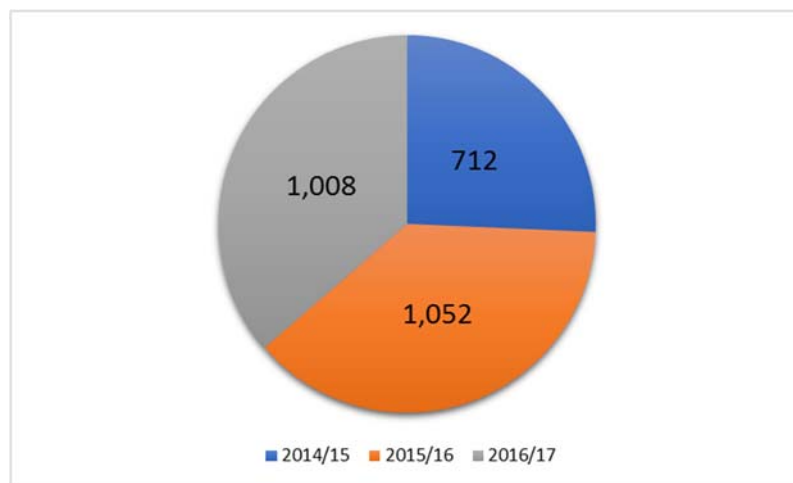


Figure 6: ITC Program Enrolment; 2014-2016

Overall, as the University is in the process of developing a Strategic Enrolment Management Plan, more initiatives will come in place to attract first time high school students from beyond the Kamloops region since this demographic of students is predicted to decline. Efforts will be made to further increase participation, from within the Kamloops region, for academic offerings to adult, part-time and remote learners through Open Learning (online programs) and flexible open campus programs.

Strategic retention efforts will be made to eliminate obstacles such as social, academic, administrative, financial, etc. that may get in the way of students' success.

Academic growth is anticipated in the graduate programs. Three new programs were added in the past few months and more are in the process for Ministry approval. There is capacity for increase in the trades training programs as well.

**Housing**

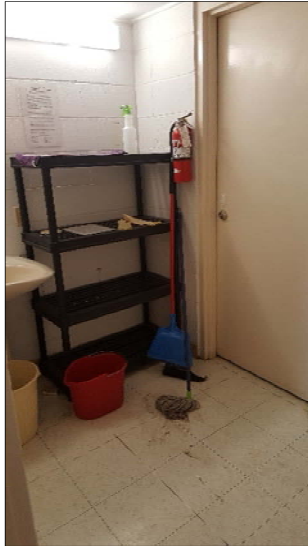
There are two on campus housing options available to TRU students; TRU residence, also known as the Tower, and McGill housing. The residences are operated by Campus Living Centres (CLC), a student housing management company.



The McGill housing is spread across three buildings and consists of 300 semi-suite style units. The units include four private bedrooms, a kitchenette, common area and a shared washroom. All residents in McGill have access to a central building with card-operated laundry, bike storage, mail, big-screen TV, BBQ deck, pool tables, study area and other recreation space.



McGill rooms have private outside entrances. The room includes a bed, desk, kitchenette with microwave, double burner element and a fridge.



The TRU residence is made up of 570 units in a 11-storey building. The unit mix includes bachelor, 2-bedroom and 4-bedroom suites. Each private bedroom comes with a desk, chair, double bed, phone, TV and lamp. A 24-hr reception desk, common lounges, larger kitchens on alternate floors, patio, games room, large common area on first floor, 24-hr fitness area, storage and laundry facilities are some of the amenities that students have access to in the building.



TRU residence includes high-speed internet wi-fi access. Students in McGill housing are required to purchase their own internet plan. All floors are co-ed but each unit is assigned to all females or all males only. All on campus housing students have access to 24-hr security and on-site management.

All housing rates include all utilities (heat, hot water, electricity). McGill rates do not include parking, cable or internet. TRU residence does not include parking. *Table 7* shows housing rates for each unit type in both residences.

Unit Type	Rates per Semester (Fall/Winter)
<b>McGill Housing</b>	
Regular	\$2,132
Upgrade	\$2,257
Deluxe	\$2,377
<b>TRU Residence</b>	
Bachelor	\$4,175
2-Bedrooms	\$3,625
4-Bedrooms	\$3,625

**Table 7: Residence Fees; 2016/17**

Both residences have been operating at 99% occupancy for the past three academic years. McGill housing was at 33% occupancy over Summer 2016 while TRU residence was 17% occupied. An additional 12% occupancy over the summer months originated through hotel business from sports groups, conferences and tourism.

Currently 25% of students in TRU residence are international students; 30% at McGill are internationals. TRU World offers international students with a robust homestay option, currently enrolling 15% of new international students and 8% of continuing students. During the 2015 and 2016 summer terms, close to 70 ITC program students stayed in on campus housing for the four-week program duration. TRU World predicts approximately 30 to 40 students will stay in the residence for the same program over the next three summers. The most predominant issue reported by these students is the lack of food options available on campus over the summer.

Students residing on campus have the option of living in several themed communities; alcohol and substance free, healthy living, academic and quiet and mature students.

First year students originating from outside the Kamloops area and enrolled at TRU for the first time in a minimum two-year degree or diploma program are guaranteed housing if they apply by March 1.



After the deadline, applicants are accepted on a first-come, first-serve basis. Application for the Fall semester open on February 1 and on October 1 for the Winter semester.

## Dining

There are currently no meal plan requirements for students on campus. TRU dining is currently managed by Aramark food services. There are nine different food outlets in six different building around campus. They include full service Tim Hortons, Starbucks, limited menu Bentos sushi, The Den (sit down full service restaurant) and the rest, Aramark food concepts. Meal cards are available for purchase with a declining balance. There is currently no meal plan available.



In the Fall of 2016, Food Services extended operating hours. Previously, where most campus food locations would close between 1 p.m. and 2:30 p.m., between Mondays and Fridays and closed on the weekends, 5 of the 9 locations are now open until 4 p.m. and beyond. Food Services continually reviews its hours of operations in order to support the demand of the community.

The Canadian University Survey Consortium (CUSC) surveys also ask respondents to indicate whether they have used a particular service, and if so to indicate their satisfaction with that service. Use of food services was slightly lower for TRU students, satisfaction was higher for first year and middle year TRU students. Graduating students at TRU reported a much lower

satisfaction with food services (59%) compared to the rest of Canada (71%).

Almost 50% of students responding to Scion's housing survey reported being inserted in housing that came with a meal plan.



## Section 5: Overview of Off Campus Rental Housing Market

TRU students have a range of off campus rental housing options from which to choose. However, none of these options would be considered direct competitors with institutional quality campus housing in terms of educational intentionality though there are many that can compete in terms of convenience to campus and a growing number that are providing some level of amenities. Scion gathered data on rental housing options available to TRU students through information provided by the University students and staff, online research and a driving tour of the surrounding neighbourhood.

Characteristics of the off campus rental market include:

- By the unit leasing
- Utilities or other amenities such as water, gas, electricity and Internet are not included in monthly rent
- 12-month leases with very limited short-term lease options

Scion conducted an analysis of rental housing options near TRU's Kamloops campus which are likely to attract TRU students. The analysis focused on housing located within 30 minutes of walking distance to campus. Scion identified rental properties that may appeal to TRU students using proximity, pricing and amenities, through online research (*i.e.* Kijiji.ca, Walkscore.com) and through a driving tour of selected properties.

It is important to note that the off campus market analysis was conducted in the middle of the Fall semester and may not reflect the same unit types and their associated rentals rates as would be available to TRU students at the beginning of Fall. The predominant unit types in the Kamloops rental market appear to be studio units and one-bedroom units with two bedroom units being the next most common. Three and four-bedroom units have limited availability. The properties included in this analysis range from 0.8 to 1.5 kilometers from campus; the average distance is 1.1 kilometers from campus.<sup>1</sup>

There are not yet any building that would match the current definition of purpose- built student housing properties in Kamloops, although there are a growing number of professionally managed buildings that are targeted solely or at least partially at students. There is a wide range of quality amongst this grouping of housing. Many of these spaces are in current or former motels that now dedicate some or all of their spaces to students while others are relatively new construction featuring high end finishes and amenities. Feedback from focus group and whiteboard sessions reported these properties are heavily advertising and making efforts to target TRU students. Some management companies will go

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<sup>1</sup> Distance measured from 900 McGill Rd, Kamloops, BC V2C 0C8, Canada.

as far as marketing themselves as TRU student housing. These properties require students to go through the same verification and application process as non-student tenants. Typically, if the bedroom or unit has an available parking spot, it is included in the rental price. Townhomes have in-unit laundry available, while the rental buildings offer on-site laundry facilities. There is no access to workout facilities in most of the rental options included in this analysis. In two, three or four-bedroom units, students typically have access to a shared kitchen and bathrooms. Examples of such locations include Upper College Heights and MacBeth Place, both of which serve clients that are nearly 100% students and are marketed as student housing.

Table 8 shows median, per person, monthly rental rates adjusted to include utilities and furniture.<sup>2</sup>

Unit Type	Average Adjusted Monthly Rate per Bed	Min Monthly Rate per Bed	Max Monthly Rate per Bed	TRU Residence Monthly Rate per Bed	McGill Housing (Regular) Monthly Rate per Bed
Studio	\$765	\$725	\$805	N/A	N/A
1 BR Apartment	\$1,087	\$980	\$1,480	\$1,044	N/A
2 BR Apartment	\$697	\$500	\$830	\$906	N/A
3 BR Apartment	\$647	\$442	\$852	N/A	N/A
4+ BR Apartment	\$505	\$426	\$426	\$906	\$533

Table 8: Adjusted Market Rental Rates

Utility, cable, Internet and furniture adjustments used in the above calculations follow:

Adjusted per unit monthly costs				
<i>Independent of occupancy/rooms</i>		<i>Based on occupancy/rooms</i>		
Internet per unit	\$40	Number of bedrooms	Electricity	Furniture
		1	\$40	\$75
		2	\$75	\$95
		3	\$100	\$115
		4+	\$120	\$135

Table 9: Utility Adjustments

<sup>2</sup> A full listing of properties with advertised and adjusted rental rates is available in *Appendix A*.

It is worth noting that the rates in *Table 8* have not been adjusted to account for other amenities that are typically included in University-owned or affiliated student housing and have some value for most students. These features often include:

- Shared academic and social spaces
- 24-hr security
- Guidance and support offered by live-in staff
- Proximity or transportation to classes and other campus functions

The competition for the student market is growing in Kamloops. **Despite any current feeling of “crunch” and lack of student housing, one needs to consider the expanding market off campus and that while waiting lists for TRU residences do exist, they are not deep and most students on the list are eventually offered housing.** To this point, there is still not a purpose-built student housing operation being proposed openly or in any apparent discussion phase. However, there are current projects such as Summit Village Residences <http://summitvillagekamloops.ca/> which are marketed to clientele that include students and amenities and styles to appeal to students are included. **There is one new development that has been approved 1275 Dalhousie of 375 units and another one is in progress but not yet approved that is planned to involve three towers at 1021 McGill Road of 208 units.** Each of these projects is so close that it is **nearly on campus** hence location of campus residence is not an advantage in comparison. As both of them list students and university staff/faculty in their target markets it is a wise assumption that some degree of amenities may be student specific. The current vacancy rate for Kamloops is 1.1% (November 2016) which is very low. These new projects will help and based on current market pricing for similar stock, they will be in **price ranges that are direct competition with campus housing and likely to have some price points between the McGill Residence and the TRU Residence.**

**Section 6: Peer Institutions Review**University of the Fraser Valley

*Undergraduate Population:* 8254 FTE students (Fall 2016)

689 Aboriginal

1105 international students

Baker House, 200 students, is the first and still only residence; each unit is 2 private bedrooms with single beds; a shared bathroom; shared kitchenette (mini-fridge, microwave, sink), small dining space. Common lounge on each floor with soft seating, TV, washroom. Study rooms on each floor.

UFV has little information available about residential programming and events. There is a list of events that have happened over the past few years. Baker House was opened in 2007.

UBC Okanagan

Student Housing and Hospitality Services – oversees residences, conferences and food

*Undergraduate Population:* 7,668

*Graduate Population:* 724

Opened in 2005

1700 in residence

First years live in 6 residences that are traditional style or an updated traditional style of residence.

Most are guaranteed residence for the academic year if applied by May 1 of previous year; receive and accept admission to UBC-O by June 1; entering from high school (or equivalent) directly or with no more than 1 gap year OR newly admitted first or second year international student

Additional Priority – must have ONE of the following: Aboriginal person of Canada; new student with a disability or ongoing medical issue that significantly impact housing needs; participant in a reciprocal exchange program; newly admitted student with an athletic scholarship from UBC; newly admitted graduate student with one of specific scholarships/fellowships/awards

*Living Learning Communities*

Called – “Integrated Learning Communities”

Expressive Arts; Indigenous; International and Global Leadership; Healthy Living; Leadership and Civic Engagement; Sustainable Leadership; Innovation and Technology

The Integrated Learning Communities have been a growing success story at the institution with interest

from many faculties for involvement and strong demand from students. The programs are evaluated each year and adjusted to keep up with changing programs and trends.

All fees listed below are per person/per academic year.

Cascades – 4 bedroom apt - 6,254 including 900 advanced payment (AP)

Monashee – studio (double bed) – 6,706 including 1,150 AP

- 1 bedroom apt – 8,064 including 1,450 AP

- 4 bedroom apt – 5,801 including 900 AP

Mandatory meal plans at Cassiar, Kalamalka, Nicola, Purcell, Valhalla and Similkameen

Similkameen – traditional single room – 8,368 including 1,900 AP and includes Bronze mandatory meal plan of 3,390

Nicola, Kalamalka, Purcell, Valhalla and Cassiar – Traditional Semi-Private – 9,102 including 1,900 AP and Bronze meal plan of 3,390

Traditional Semi-Private is two single rooms sharing a bathroom for 2 same-gendered students; fully furnished with single bed, desk, dresser, closet; each floor has TV lounge; wifi included; study rooms in the building

#### University of Victoria

*Undergraduate Population:* 17,797

*Graduate Population:* 3,412

2300 students in residence

<http://www.uvic.ca/future-students/undergraduate/housing-dining/index.php>

Housing at the University of Victoria is in high demand and there seems to be a general shortage of housing for students in the city of Victoria in general. First year students are guaranteed housing provided they meet conditions related to an application process timeline that is fairly typical. Upper year students have a chance to return to housing through a lottery process to allocate the remaining, non-family housing, spaces in the residence system.

*Room types for undergraduates:* Single traditional; double traditional; apartment; 4-person townhouse; single apartment

21 dormitory style buildings include meal plans with mix of single and double rooms – common lounges with TV, cable and microwave and central washrooms on each floor; twin extra long beds; Cable available in room at extra cost; wifi and data ports included

*121 Apartment and townhouse units:* “Cluster rooms” with meal plans optional; 4 single bedrooms in each cluster unit. Each kitchen with 2 fridges, stove, dishwasher, dining table and 4 chairs, cable for a fee, provide own TV, wifi and data ports included, fully furnished.

*46 Studio and 1 bedroom Apartments:* Graduate students receive priority for these spaces and the apartments are within the dormitory buildings.

One of the elements of the University of Victoria’s housing program that is most well known are its Living Learning Communities and the academic connections that most of them possess.

*Specialized Communities:* Each of these require a supplemental application; some require admission to specific departments or faculties. The LLCs at the University of Victoria are very well-established and respected for their quality. Most of them are directly connected to the faculties for those areas of study and have faculty member involvement to some degree.

LLCs – Arts Collective; Business community; Engineering Community; Health and Wellness Community; International Cultures Community; Leadership and Civic Engagement Community; Science Community; Sustainability Community  
Substance Free Community  
Quiet-floor Community

In addition to the LLCs at UVic, there is also a *Counsellor in Residence* program providing services to the students within the residences and support to the residence staff members.

The university provides limited housing for students with partners and/or families in a section of its townhouse and apartment facilities. The university has extensive rules and qualifications outlined for students who wish to utilize the family housing options available. This would provide a strong example for setting up such a program.

#### University of Lethbridge

*Undergraduate Population:* 8059

*Graduate Population:* 220 (growing)

*Housing Office Mission:* To provide convenient, clean and affordable accommodation to students of the University of Lethbridge, together with an operating structure, policies, procedures, and programs that provide a safe and positive atmosphere for the personal, academic and social growth of our residence students.

*Residence Capacity:* 520 beds for upper year students and 480 for upper year students.

*Residence being considered for expansion:* Yes – undergoing a study to determine what type and how many beds.

Approximate number of first year students in campus housing: 264 beds

*Style of residence in which most first years live:* The design of campus is that rooms for the first year students are in some variance of a traditional dormitory style residence. The bedrooms are nearly all single bedrooms with a variety of sizes of shared suites with minimal to no cooking facility within the unit. In addition, there are some double occupancy traditional rooms. At the moment, 256 first year students are also placed in one building that is comprised of 2, 4 and 6 bedroom apartments and to compensate for the style of units not being as conducive to first year students, the RA staff ratio is lower and community building is emphasized.

*Residence Guarantee:* No. Lethbridge runs a lottery and gives a deadline by which to apply to be in the lottery. The lottery is restricted to non-local potential students and students are encouraged to put their application in for the lottery before they are accepted into the university academically. Students can apply for residence as soon as they have a student ID number which may be several months before academic acceptance. Demand for residence is far higher than supply.

*Alcohol:* Permitted in the unit, room and each residence has one lounge area that is licensed for consumption. Drinking age in Alberta is 18 leaving approximately 80% of students of legal age at time of opening and only a few remaining underage by the December holiday.

*Rent Collection:* Monthly rent payment is VERY rare. Students make an advance payment in the summer. The bill for residence is applied in early October to match up with the usual student loan timeline. Students have the option of one full academic year payment or two installments. Payment terms are very strict for students and there is little flexibility due to the lack of supply. This may change with additional supply.

*Residence Government:* Yes. There is an active residence hall association that operates programs, events and serves as an advisory board to the university housing office. In writing, at least, there seems to be an intentional and positive connection between the RA staff and the residence association.

*Residence Staff Presentation:* On the website at Lethbridge the RAs are intentionally presented as this, “Don’t think of your RA as mom or dad: an RA is more like a cool older brother or sister looking out for you. Our RAs are trained in emergency response standard first aid, and mental health first aid not because you’ll need it, just because we like to be prepared.”



*Living Learning Communities:* Currently, there are no LLCs in place. The style of housing (3/4 of which is townhouses or apartments) is not conducive to doing this well and this may be a contributing factor.

*Recognition:* Scholarships for the following year are offered to students in residence where community involvement, citizenship and leadership are among the criteria.

*Resident Support:* Involving both members of the residence government and the RA staff, there is a planned model for student support with roommate issues, personal issues and follow-up support. This has a restorative justice aspect to it as well as personal development. If successful, some of the minor issues can be kept out of the disciplinary system but still recorded in case the issues arise again.

*Disciplinary System:* There is an administrative process that includes formal administrative sanctions along with educational and/or service sanctions as appropriate. With the exception of restitution for damages and the issue of smoking and fire safety, there are no fines.

*Hugs from Home Program:* A “care package” arrangement with families from the university bookstore with food and school gear available to send as encouragement.

Housing Costs	8 Month Leases	8 Month Leases	8 Month Leases	8 Month Leases	8 Month Leases	Notes AP = Advance Payment
Institution	Traditional Single	Traditional Semi-Private (2 single beds, shared bath)	Studio Unit or 1 Bedroom Unit	2 Bedroom Suite (2 single beds, shared bath, shared common space)	4 Bedroom Suite	
University of the Fraser Valley				\$4,844		\$500 AP \$50 Application Fee \$75 Reslife Fee \$300 Damage Deposit \$200 December Holiday Break fee (Optional) \$125 other fees

Housing Costs	8 Month Leases	8 Month Leases	8 Month Leases	8 Month Leases	8 Month Leases	Notes AP = Advance Payment
Institution	Traditional Single	Traditional Semi-Private (2 single beds, shared bath)	Studio Unit or 1 Bedroom Unit	2 Bedroom Suite (2 single beds, shared bath, shared common space)	4 Bedroom Suite	
University of Lethbridge	\$4,680	\$5,232	\$6,376 (studio in new building) \$8,592 (1 bdrm, full kitchen)	\$5,496 (full kitchen)	\$5,232 (1 <sup>st</sup> years) \$5,416 (full kitchen)	\$300 Sec Dep \$50 Application Fee Rez Lottery space with conditions (1 <sup>st</sup> year, non-local) Mandatory Meal Plan for all first years and rooms with kitchens
University of Victoria	\$8,536		\$8,000	\$6,134	\$5,644	\$500 AP \$60 Reslife \$45 Application Fee Rez Guarantee with conditions Mandatory Meal Plan for Traditional housing
Thompson Rivers U			\$8,475 TRU Residence Tower (add \$100 for 2 installments)	\$7,400 - \$8,125 TRU Residence Tower (add \$100 for 2 installments)	\$4,940 McGill Rez \$7,400 TRU Residence Tower (add \$100 for 2 installments)	\$500 Sec Dep \$40 Reslife fee \$96 Internet fee at McGill Rez Rez Guarantee with conditions (1 <sup>st</sup> year)
UBC-Okanagon	\$8,368 Includes meal plan of \$3,390	\$9,102 Includes meal plan of \$3,390	\$6,706 (studio) \$8,064 (1 bedroom)		\$5,801 - \$6,254	\$900 - \$1,900 AP Mandatory Meal Plan for housing without kitchens/kitchenette included in price

Table 10: Peer Institution Review

## Section 7: Summary of Focus Group Sessions

### Focus Group Sessions

Scion conducted two focus group sessions involving a total of 20 students on Nov 28, 2016. Each session lasted approximately 45 minutes. A breakdown of the student participants follows in *Table 11*:

Group	Number of Participants	Female / Male	Year of Study	Origin
First and Second Year Residence Students	12	6 F 6 M	Year 1 (11) Year 2 (1)	BC (6); International (6)
Off Campus Student Renters	8	5 F 3 M	Year 1 (4) Year 2 (1) Year 3 (1) Year 4 or more (2)	BC (3); AB (1); Ontario (1); International (3)

**Table 11: Student Focus Group Participants**

Most of the students who attended the focus group sessions were vocal and eager to participate. More female students than male students participated. Students represented a mix of ages and years of study. In addition to collecting some basic demographic data such as where students are living, participants were asked open-ended questions intended to facilitate discussion.

Feedback from the student groups was informative and several themes emerged as summarized below.

#### Positive Aspects of Living in Residence

- Convenience to campus
- Social and communal aspects
- Great way for out-of-region students to get involved

#### Negative Aspects of Living in Residence

- Maintenance issues such as broken elevators, unresolved problems with kitchens in the common areas and general confusion about how to place a maintenance request
- Guest policy is too strict
- Need more social/lounge areas
- Lack of nightlife or social events on campus in the evening

#### Positive Aspects of Renting Off Campus

- Privacy
- Rental rates much cheaper in comparison to on campus (all-inclusive options as low as \$400-\$600 per month)

#### Negative Aspects of Renting Off Campus

- Late-night walks are an issue
- Kamloops transit system is not convenient or reliable
- Mostly 12-month contract options – many require subletting over the summer

#### Cars and Parking

- Most residence students don't have a car since parking is too expensive
- Off campus students will pay cheap rental rates and purchase a car to commute to campus - also need a parking pass on campus, an added expense
- Parking in general is expensive on campus and really difficult to find empty spaces in the morning

#### Cooking and Food

- Most off campus students cook their own food
- Residence students mostly cook their food as well and order a lot of delivery, especially later in the evening, since many campus food outlets are closed
- Many students are interested in a dining hall on campus with later operating hours

#### Safety

- Almost all students feel safe on campus and in residences

#### Housing Plans for Next Year

- Most residence students looking to move off campus
- Almost all student renters will continue to rent with current or new properties

#### Recommendations for New or Existing Residences

- Improved wi-fi
- Addition of cafeteria or dining hall
- Locks on bedroom doors are desirable
- Access to a full gym within the residence

## Section 8: Summary of Stakeholder Interviews

Scion conducted a series of stakeholder interviews with key TRU staff on November 28, 29 and 30, 2016 in order to enhance Scion's understanding of current and future campus objectives and to gain insight into the range of perspectives on campus housing. Factors that were considered included enrolment trends and recruitment initiatives, eligibility and occupancy management policies, and operational impacts and effects of student housing on campus. Campus stakeholders who participated in individual and group interviews include the following:

Alan Shaver, President  
Baihua Chadwick, AVP International and CEO Global Operations  
Brandon deKreiger, Manager, Student Residence  
Christine Adam, Dean of Students  
Craig Engleson, Manager, Events, Activities & Housing TRU World  
Diana Skoglund, Director of Media Relations and Communications  
Dorys Crespín-Mueller, Executive Director, Integrated Planning and Effectiveness  
Finlay Sinclair, CEO, TRU Community Trust  
Glenn Read, Director of Ancillary Services  
Jacquetta Goy, Director, Risk Management Services  
Joanne Brown, Supervisor, Services for Aboriginal Students  
Matt Milovick, VP Admin & Finance  
Mike Bluhm, AVP Strategic Enrolment and University Registrar  
Paul Manhas, AVP Finance  
Sara Wolfe, Assistant Dean of Students  
TRUSU Executives  
Warren Asuchak, Director of Facilities

There is a sense amongst TRU staff and students that the campus requires opportunities and activities that can help generate more nightlife. Adding more on campus housing can assist in achieving such goals by demanding more services that can operate on a 24-hour basis. The inadequacy of late-night social hangout spots on campus result in students leaving the property as early as 4-5 p.m. Issues that lead to low urban vibrancy at night time, such as very few classes being scheduled in the evening and food services not operating at later hours due to shortage of customers, are hoped to be rectified by additional beds on campus. President Alan Shaver echoed these views and recognizes “the lack of retail services” on campus. The impact on campus operations due to additional housing was also

considered in conversations with campus stakeholders. Some resources might include such as a counseling center and increased campus security. Increased staffing would also be required for maintenance and landscaping.

Another resource that is increasingly required on campus is a dining hall. Some stakeholders recommended a traditional-style dining hall with perhaps a first year mandatory meal plan. Necessity of a dining hall is even more evident during the summer months. Coordinators of the ITC program noted the lack of food options and limited operating hours over the summer term as one of the main disadvantages for their students residing on campus – an enrolment increase is expected in their four-week summer program in the next few years, leading to a higher number of students seeking to reside on campus. In a student feedback survey conducted by the University, the lack of a dining hall was noted as the biggest critic by students on campus.

Pricing is seen as a crucial element of any on campus housing – the “number one” consideration; students prefer to be offered rental rates which are competitive with the off campus market. This sentiment expressed in stakeholder interviews reflects comments made by students in focus group sessions and the online survey. Students with price sensitivity looking to live on campus decide to rent in McGill residence as the price is cheaper than the TRU residence. The option of offering low income housing or competitive rates in comparison to off campus properties is especially critical for the two growing demographics of students; Internationals and Aboriginals - making up close to 40% of on campus student population.

The physical appearance of McGill residence is a major concern. Stakeholders fear the old and tired aspects of the building will eventually develop high rates of dissatisfaction among students living in the residence and potentially affect future occupancy and retention levels. The University has some important decisions to make in regards to McGill residence’s renovations and related finances over the next few years.

As enrolment numbers are projected to climb for graduate and international students, the demand for graduate, mature or family student housing is also becoming essential. Students in the law program are also expected to increase – also mature students, most likely with a spouse or children. About 40% of aboriginal students come with families, making up close to 10% of on campus students – also a growing population. The ability to provide on campus housing options for these demographics of students is not only viewed as a recruitment incentive but also as a dire necessity.

The pervading impression among campus stakeholders is that off campus rental properties are a strong competition to on campus housing as they offer cheaper rent and are more attractive as they provide

access to full kitchens. Growth in affordable off campus rental options produces high levels of concern for on campus housing.

Housing is seen as having the potential to support and increase recruitment objectives. Although enrolment projections show a steady number for domestic students, 85% of on campus domestic students originate from British Columbia and there is a desire to provide housing for students living outside the one-hour drive radius to campus. There will always be local students who attend TRU campus and live at home, the general perspective is that the campus is losing students from farther away who do not attend because housing is not available.

The overall view of housing on campus seems to be one of general interest and enthusiasm tempered by caution. The high degree of price sensitivity among students is seen as an important consideration, although the potential benefits of housing on campus – to recruitment, student experience and the campus community – are also widely recognized by stakeholders. Further, stakeholders seem to recognize that housing requires support across campus – not just from those directly involved in operating the residences.