   

National Census of University Student Accommodation Providers 2014

UNIVERSITY COLLEGES AUSTRALIA

Better Leaders, Better Collegiate Life

June 2015

University Colleges Australia (UCA)

Australasian Association of College and University Housing Officers (AACUHO)

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Disclaimer:

The information in this report is intended to provide information and analysis on the size and selected characteristics of the Australian university student accommodation sector and on changes that have occurred since the April 1999 census of the sector undertaken by University Colleges Australia (**UCA**) (formerly AHAUCHI).

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The opinions in this report are those of the authors and do not necessarily represent the views of any of the Australian Government Department of Education and Training, UCA, AACUHO, or any other organisations or individuals associated with the Census project.

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An appropriate citation for this publication is:

McDonald, P, Hay, D, Gecan, I, Jack, M & Hallett, S 2015, *National Census of University Student Accommodation Providers 2014*. University Colleges Australia. June 2015. Subiaco, Western Australia.

ISBN: 978-0-646-93270-5

Survey instruments and associated materials used for this project were granted Australian Government Statistical Clearing House Approval Number: 02396-01.

Graphic design consultant: Corinna Kley.

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ACKNOWLEDGEMENTS

Tertiary Balance Pty Ltd was commissioned to undertake this study by UCA in August 2014.

The project team wishes to thank the following people for their assistance with the project:

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Australian Government Department of Education and Training

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FUNDING AND OTHER SUPPORT

The National Census of University Student Accommodation Providers 2014 was an initiative of University Colleges Australia (UCA) and was undertaken with assistance from the Australasian Association of College and University Housing Officers (AACUHO).

This project was jointly supported and funded by UCA and the Australian Government Department of Education and Training.

About University Colleges Australia
Formed in 1966, UCA is the peak national body in Australia for heads of residential university colleges and halls. The Association represents more than 60 colleges and halls nationally. Its key objective is to promote the benefits of collegiate residences in Australian universities. Specifically to promote collegiate life as a means to a broad education, including academic, social, cultural and moral development.

About Australasian Association of College and University Housing Officers
Formed in 1991, AACUHO is the premier professional organisation for all who work in post secondary education accommodation, in any capacity, in Australia, New Zealand and South East Asia. Its core purpose is to support and facilitate quality standards of service delivery in student housing, facilitate sustainability of student housing as an industry and advocate for the economic and pedagogical benefits as a result of standards in student housing services.

About Tertiary Balance
Tertiary Balance is an indirect tax (GST, FBT and payroll tax) advisory firm with a national client list of residential colleges and has been closely involved both with the sector and as a consultant to UCA for over sixteen years. The company advises colleges on the National Rental Affordability Scheme (NRAS) and provides support to the sector at federal level for submissions to government on taxation policy as well as providing support at the state level for submissions to government(s) on tenancy law reform policy.

1 EXECUTIVE SUMMARY

As at November 2014, Australia had 74,482 places in university colleges, halls of residence and 100 plus bed commercial student accommodation sites. These were established either on or off campus and managed either by a university or an external organisation. This total is up from 39,561 places in 1999, when the last national census was undertaken.

The 74,482 places are owned and managed under a variety of arrangements. Forty per cent of the places are university owned and managed; another 37 per cent are also on campus, but managed by external organisations; and a further 23 per cent are managed by an external organisation off-campus.

New South Wales has more places than any other state in Australia. However the greater metropolitan capital city with the most places is Melbourne with 16,393. Sydney has 13,153 places. Greater metropolitan Melbourne is projected to maintain its lead over Sydney in terms of total number of places, at least until 2018.

Overall, nationally about 30,000 (40 per cent) of the 74,482 places are occupied by international students, about 29,000 (39 per cent) of the places are in sites offering some form of catering and about 14,000 (19 per cent) are in sites in regional Australia.

The percentage of places occupied by international students is higher in commercially owned and operated sites (at 55 per cent) than in other types of sites (32 per cent).

Based on the known number of international higher education students in Australia in 2014 (236,249), about 13 per cent of all inbound full-time internal-mode higher education international students in Australia lived in the places identified by this survey in 2014.

It is further estimated that about 24 per cent of all 'mobile' higher education students lived in the places identified by this survey. This is based on taking mobile as being the in-bound internal-mode higher education international students, domestic interstate students and domestic intra-state students whose permanent home address postcode is more than 60 kilometres from their campus postcode.

A survey of the student accommodation providers covered by this report found an expectation of strong growth going forward with an additional 19,169 places planned to be established up to 2018. This growth is anticipated to be heavily concentrated in Melbourne and Sydney.

Provided the current favourable settings for construction of new places continue over the next few years, the total number of purpose built 100 plus bed places nationally is likely to exceed 100,000 by 2020.

Figure 1: Distribution of places by ownership and management type – nationally in 2014

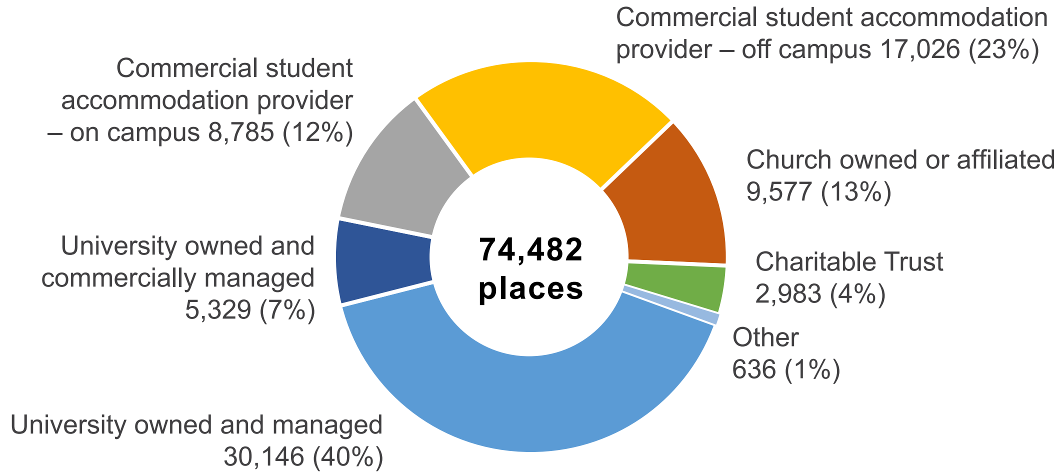


Figure 2: Concentration of purpose built student places by greater metropolitan capital city

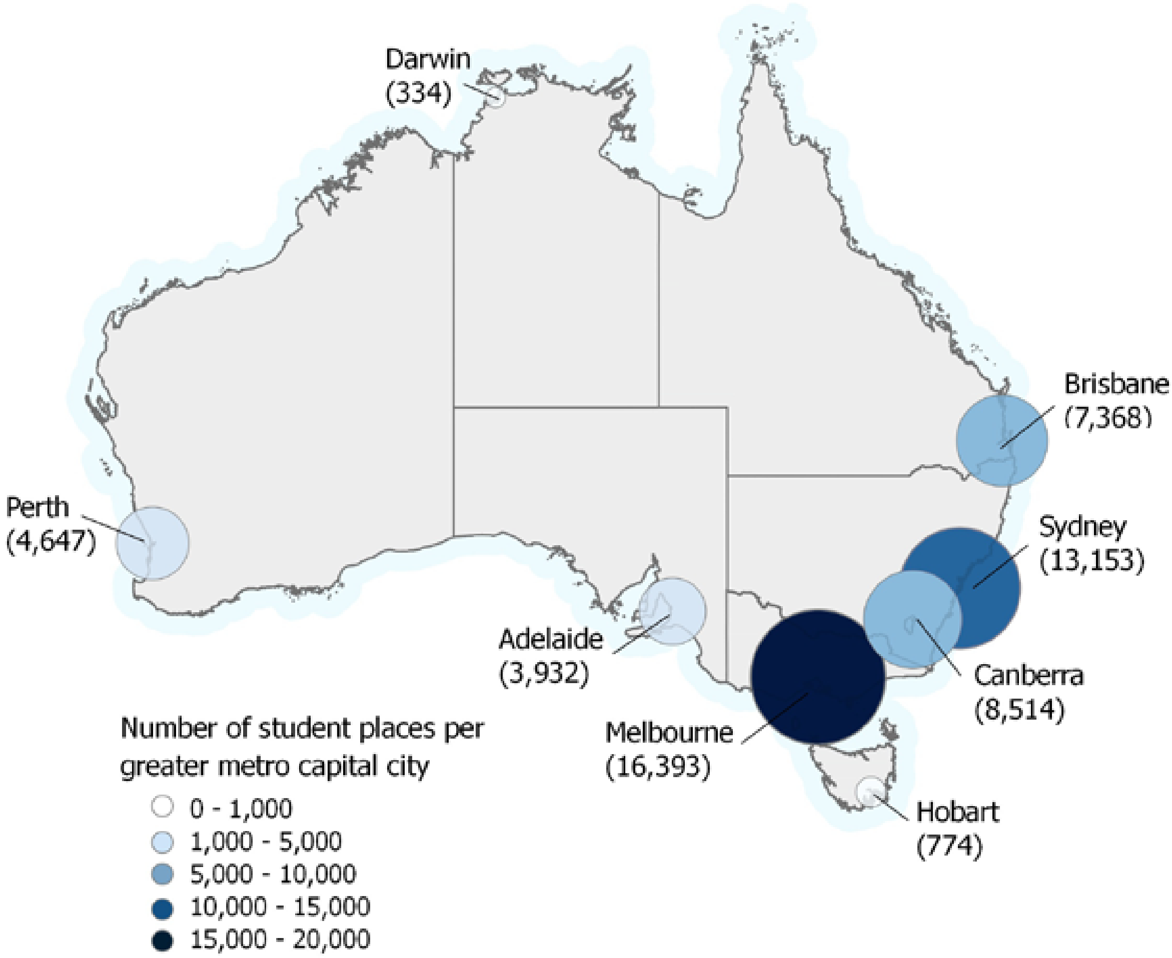
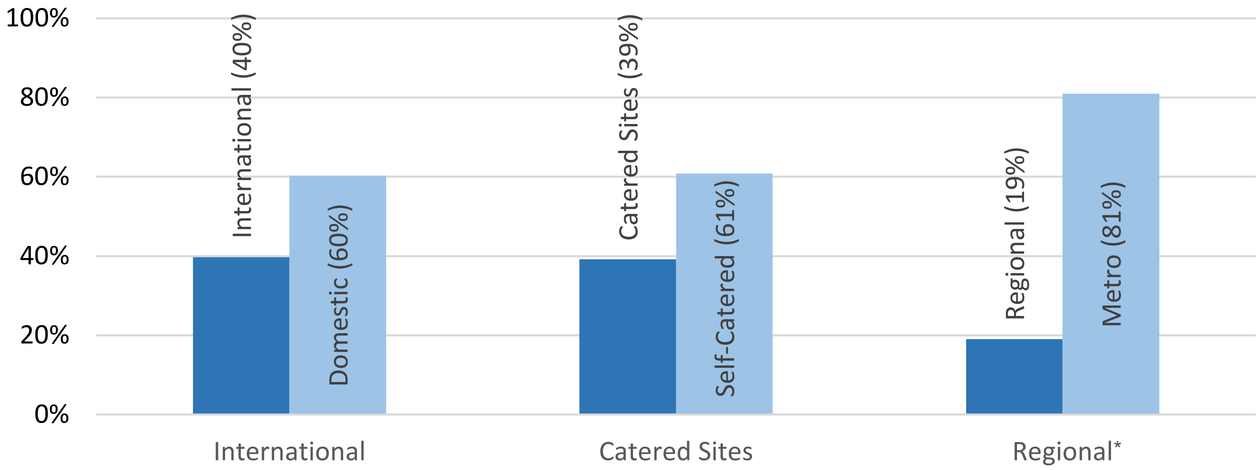


Figure 3: Breakdown of all 74,482 student places – nationally



* What is meant by 'regional' for these purposes is defined at page 26 in Chapter 4.

2 STUDY BACKGROUND

The 1999 Census

It has been 16 years since the last national census of the sector in Australia was undertaken.

The 1999 Census was coordinated by then UCA President Robyn Wilkes.[1] It achieved a 100 per cent response rate, identifying 34,311 places nationally in tertiary residential colleges and halls of residence.[2a]

At the time the 1999 UCA Census was undertaken, the commercial student accommodation part of the sector in Australia was in its infancy. There were fewer than 2,000 commercially owned or operated places nationally, the large majority of which were at four sites (two in Melbourne and one in each of Sydney and Brisbane) operated by UniLodge.

The 1999 Census did not cover the commercial student accommodation providers, prices charged or the demographics of students in residence.

Other relevant studies in Australia

There have been a number of previous reports or studies on or references to the sector in Australia in addition to UCA's 1999 Census.

In April 2015, the Australian Government Department of Education and Training published the '*Draft National Strategy for International Education*' which included an invitation for public consultation on proposed measures to improve access to suitable and affordable student accommodation for international students.[2b]

Also in April 2015, the Productivity Commission published it's research paper '*International Education Services*' which noted that sustainable growth in international student numbers in Australia is dependent on the availablilty of student accomodation. [2c]

In October 2014, Knight Frank published the latest of a series of market updates on the purpose built student accommodation (PBSA) market in greater metropolitan Sydney.[3,4]

The 2014 Knight Frank report identified around 13,000 places (excluding boarding houses) currently operating in Sydney as well as identifying an additional 6,124 places (across 19 schemes) in the Sydney pipeline and due to commence operation in or before 2018. The report looked at price points of accommodation offered but did not look at the demographics of residents.

In June 2014, Jones Lang La Salle (JLL) published a market update on student accommodation nationally.[5]

The 2014 JLL report estimated there were 53,459 PBSA beds or places in the six major metropolitan capital cities comprising 25,882 university places and 27,577 commercial places. The JLL report covered more accommodation types than this report but did not look at the demographics of residents.

In June 2013, the Australian Government Department of Education and Training published '*International higher education student satisfaction with accommodation in Australia*.'[6] The report found that only 11 per cent of the 35,710 international students who responded to the survey lived on campus. The report also found that 84 per cent of all student respondents were satisfied with the quality of their accommodation, notwithstanding the majority lived off campus. The report confirmed that accommodation in Australia is considered relatively expensive by international students, with only 51% of all respondents indicating they were satisfied with the cost of their accommodation.[7]

In February 2013, the International Education Advisory Council (IEAC) published '*Australia – Educating Globally*' (Chaney Report),[8] in which a review of accommodation for international students in Australia was recommended. Also in February

1 Over the period 1999 – 2001 Robyn Wilkes was National President of the predecessor organisation to UCA, which was the Association of Heads of Australian University Colleges and Halls, Inc or AHAUCHI for short. AHAUCHI rebranded as UCA in November 2010.
2a Wilkes, R 1999.
2b Australian Government 2015, pp 44-46.
2c Productivity Commission 2015. p70.
3 Savitz, P 2014.
4 Rader, V *et al* 2013.
5 Newland, C 2014.
6 Lawson, C 2013. p5.
7 *ibid*, pV.
8 Chaney, M 2013.

2013, the IEAC *Analysis of Strategic Trends* report was released.[9]

In July 2010, Universities Australia (**UA**) conducted a national survey of its member universities to identify all student accommodation owned, approved by or affiliated with a university. The UA report estimated there were 50,125 places nationally.[10]

The 2010 UA report looked not only at the number of places but also the range of accommodation related services (such as assistance finding private accommodation) provided to students by their universities.

In March 2010 the Baird review of the *Education Services for Overseas Students (ESOS) Act 2000* (Cth) was presented to the Australian Government. Amongst other things it recommended amendments to the ESOS legislation to require universities (and certain other education providers) to provide information to international students about the local accommodation situation. It also stated that universities should play a more active role in securing accommodation for international students.

In 2010 the Council of Australian Governments (COAG) issued its *International Students Strategy.*[11] It called on governments and (education) providers to consider the broader issues that can impact on student wellbeing, including that of accommodation.

In 2006 UCA conducted a national survey of its members. The 2006 UCA survey did not provide numbers of places or cover the commercial student accommodation providers, but did look at ownership and management types, size of sites, catering and cleaning arrangements, and styles of accommodation.[12]

Prior to the 1999 Census, UCA conducted surveys of the sector in 1984, 1994 and 1995 which reported numbers of places.[13,14,15] The 1995 survey reported 25,833 places in 139 collegiate residences.[16] The 1984 survey reported that its random sample of 2,014 residents comprised one eighth of the sector, suggesting there were then 16,112 places nationally.[17a]

In 1998 Ashendon Milligan Pty Ltd published, as part of *The Australian Good Universities Guide* series, a guide entitled *Student Accommodation - Australia & New Zealand* which listed all university colleges, halls of residence, commercial student accommodation providers and hostels then operating.[17b]

State and local Government reports

In 2013 the City of Melbourne published *A great place to study: International student strategy 2013 – 17*, noting that students comprised 42 per cent of the city of Melbourne's population in 2010 and half of these were international students.[18]

In September 2012 the New South Wales International Education and Research Taskforce issued its *Industry Action Plan* and amongst other things raised concerns about the affordability of international student accommodation.[19]

In November 2011 the New South Wales Parliament conducted an inquiry into international student accommodation in that state. The inquiry amongst other things looked into factors affecting the supply of and demand for affordable student accommodation, particularly in relation to international students and implications for education exports.[20,21]

In February 2011 the City of Ryde in New South Wales commissioned a report on student accommodation and illegal boarding houses.[22] The report highlighted a number of cases of misconduct by boarding house operators who were providing student accommodation.

Private reports on student accommodation

Over recent years various private sector firms have prepared private (unpublished) demand studies, valuations or other analyses on the Australian student accommodation market for investors, banks, planning authorities (for Development Approvals), site operators/universities and others, with a large portion of the client

9 Love, R *et al* 2013.
10 Universities Australia 2010.
11 Council of Australian Governments 2010. p9.
12 Rate, R 2006.
13 AAHCHI 1994.
14 AAHCHI 1995.
15 Beswick, D 1984.
16 Nethercote, R 1998. p71.
17a Beswick, D 1984 *op cit* at p6.
17b Ashenden, D 1998.
18 City of Melbourne 2013. p11.
19 New South Wales International Education and Research Taskforce 2012. p3.
20 NSW Social Policy Committee 2011.
21 Australian Government Department of Education and Training 2011, *Submission (No 57)* to the NSW Social Policy Committee.
22 Le Bransky, G 2011.

engagements concentrated on the inner urban capital city markets of Sydney and Melbourne.

Property consultancy firms known to be active in the student accommodation market nationally (and in some cases internationally) and that have prepared private reports on the purpose built student accommodation sector include but are not limited to:

- AON;
- CBRE Australia;
- Colliers;
- Egan National;
- Herron Todd White;
- Jones Lang La Salle;
- Knight Frank;
- McGees;
- Rushtons; and
- Urbis.

Relevant peak sector bodies/ conferences

Within Australia peak sector bodies that represent members with interests in university student accommodation include:

- Australasian Association of College and University Housing Officers (AACUHO);[23]
- Australian Technology Network (ATN);[24]
- Council of Australian Postgraduate Associations (CAPA);[25]
- Council of International Students Australia (CISA);[26]
- Group of Eight (Go8);[27]
- Innovative Research Universities (IRU);[28]
- The National Association of Australian University Colleges Inc (NAAUC);[29]
- National Union of Students (NUS);[30]
- Property Council of Australia;[31]
- Tenants Unions and Services in all states and territories inclusive of Tenants NSW,[32] Tenants Union of Victoria,[33] Tenants Union of QLD,[34] Tenancy WA,[35] Tenants Information and Advocacy Service SA,[36] Tenants' Union of Tasmania,[37] Tenants Union of ACT,[38] Tenants Advice Service Darwin;[39]
- Universities Australia (UA);[40]
- University Colleges Australia (UCA);[41] and
- Regional Universities Network (RUN).[42]

Of the above peak sector bodies three are devoted entirely to the collegiate style and/or other parts of the purpose built student accommodation sector. The three are AACUHO, NAAUC and UCA. Each of these three holds annual conferences, engages in advocacy on behalf of the sector and attends to ongoing professional development of members.

In addition to the annual conferences in Australia on colleges and/or student accommodation held by AACUHO, NAAUC and UCA the following conferences also cover the topic of student housing:

- Informa Australia (a conference, exhibition and training firm) annual *Student Housing Forum*; and
- Australasian Housing Researchers Conference (AHRC) which in 2015 had a concurrent stream on affordable student accommodation.

Internationally, peak sector bodies that are devoted entirely to the purpose built student accommodation sector include:

- Association of College and University Housing Officers-International (ACUHO-I);[43]
- Association for Student Residential Accommodation (ASRA), United Kingdom;[44]
- College & University Business Officers (CUBO), United Kingdom;[45]
- International Houses Worldwide Inc (IHWW);[46] and
- New Zealand Association of Tertiary Education Accommodation Professionals (NZATEAP).[47]

23 <http://aacuho.edu.au/>
24 <http://atn.edu.au/>
25 <http://capa.edu.au/>
26 <http://cisa.edu.au/>
27 <http://go8.edu.au/>
28 <http://iru.edu.au/>
29 <http://naauc.edu.au/>
30 <https://www.facebook.com/NationalUnionofStudentsAU>
31 <http://propertyoz.com.au/>
32 <http://tenants.org.au/>
33 <http://tuv.org.au/>
34 <http://tenantsqld.org.au/>
35 <http://tenancywa.org.au/>
36 <https://anglicaresa.com.au/housing/tias/>
37 <http://tutas.org.au/>
38 <http://tenantsact.org.au/>
39 <http://dcls.org.au/tenants-advice.html>
40 <http://universitiesaustralia.edu.au/>
41 <http://universitycollegesaustralia.edu.au/>
42 <http://run.edu.au/>
43 <http://acuho-i.org/>
44 <http://asra.ac.uk/>
45 <http://cubo.org.uk/>
46 <http://ihouseworldwide.org/>
47 <http://nzateap.co.nz/>

3 METHODOLOGY

A total of 315 student accommodation sites nationally were within scope for the Census. These sites included all tertiary residential colleges or halls of residence (of any size) and all 100+ bed purpose built and/or operated student accommodation sites whether on campus or off campus.

Where multiple student accommodation sites are operated by a single entity with 100 or more beds or places in total across all sites, then student accommodation sites of any size operated by that entity were taken to be within scope

The student accommodation sites within scope were confined to those that primarily provide accommodation to on-shore students (whether domestic or international) enrolled in any of the 37 public universities (inclusive of Australian Catholic University) and private universities (Bond University and the University of Notre Dame Australia).[48]

The 39 universities between them operate 167 individual campuses within Australia that are within scope and where each campus has 65 or more Equivalent Full-Time Student Load (EFTSL). University campuses with less than 65 EFTSL in the 2012 year were excluded from scope.

Sites providing accommodation primarily for students enrolled in non-university higher education providers (NUHEPs) were excluded from scope.

Off-campus sites, which are often not associated with any one particular university or campus, were identified by desk research to confirm that they provide primarily accommodation to students enrolled in one or more of the 167 campuses nationally that were within scope.

All sites employing members of University Colleges Australia (UCA) and/or the Australasian Association of College and University Housing Officers (AACUHO) were considered within scope.

The scope included counting the number of places, the number and location of accommodation sites, recording site ownership and management details, styles of accommodation provided, catering arrangements and selected demographics of student residents.

Assessments of occupancy rates in sites and recording of price points (fees) were excluded from scope.

All surveys conducted by or on behalf of any Australian government agency and that involve 50 or more businesses, are subject to clearance by the Australian Government Statistical Clearance House (SCH) operated by the Australian Bureau of Statistics (ABS).

As this project received funding from the Australian Government Department of Education and Training, all survey materials were subject to clearance from the SCH. The survey materials requiring clearance included the survey instruments and the various written communications with respondents, as detailed below.

Before sites were sent the survey, efforts were made to increase awareness of the Census project.

Pre-announcement letters were broadcast by email to all member institutions from each of the three peak national bodies comprising UCA, AACUHO and Universities Australia. A copy of the pre-announcement letter is provided in Appendix C: *Survey pre-announcement letter*.

A direct email and cold-call telephone campaign was conducted for all sites that were not members of any of the aforementioned three peak bodies. In Perth, an AACUHO member's networking event was held in September 2014 where the Census project was publicised and promoted. This likely contributed to the very high response rate received from the Western Australian sites.

A help desk phone line was established to respond to queries regarding the Census project. Sites wanting information about the Census project, or

48 Refer to *Higher Education Support Act* 2003 (Cth) (HESA) Table A (public) and Table B (private) for the distinction between public and private. See also the Group of 8 (Go8) *Backgrounder* 2014 for further background on the distinction between public and private universities.

assistance with completing the survey, could call this phone number and a representative of Tertiary Balance would provide assistance.

Survey distribution occurred in mid-September 2014 via a unique link emailed to each prospective respondent. The use of a unique link for each site, as opposed to a general link, allowed respondents to exit the survey and recommence at a later time without losing their survey response work in progress.

The use of a unique link for each site also permitted different parts of the survey to be completed by different personnel within the respondent site at different times, again without losing survey response work in progress.

Where possible, the unique survey link was emailed directly to an individual at the prospective respondent site who was on the UCA or AACUHO member list. Where this was not possible, the link was sent to a Tertiary Balance contact within the site, or the Principal/Head/Manager of the site, or other available email address (listed in order of preference).

The survey was created using the web service 'Survey Monkey'. The survey appeared in two stages. The first stage was part of the online survey and distinguished multiple-site respondents from single-site respondents. Single-site respondents were then able to complete the remainder of the survey online. A copy of the survey used is provided in Appendix D: *Online survey instrument*.

Respondents with multiple residences or sites were redirected away from the online survey to a notification that they would be sent a Microsoft Excel workbook, which was developed to allow answer inputs for more than one site. This workbook was emailed to the respondents after they had completed the first stage online. A copy of the workbook used is provided in Appendix E: *Multiple-site organisation survey instrument*.

All respondents to the online survey, including those who progressed to Stage 2, were emailed a PDF print of their answers to the survey questions for their records.

Following receipt of each site's answers, Tertiary Balance moderated the answers to verify accuracy and make them consistent. For example, a site may have answered that it is 'catered' but entered a comment that meals are not bundled and students load money onto a card that can then be used to purchase food from university eateries. In this instance, the answer is moderated to define the site as 'self-catered'.

Following the distribution of the survey, non-respondents were followed-up throughout October 2014 with emails and phone calls. Sites that still did not respond were subject to desk research. Data collection was finalised on 21 November 2014 with a response rate of 82% (259 sites responded out of the total 315).

Confidence interval analysis

Confidence interval analysis (at 95%) on certain of the survey response questions was undertaken to measure the 95% probability that a total population parameter for a question response fell within a certain range. The confidence interval calculation methodology is provided at Appendix J.

Desk research

Desk research relied upon various sources, inclusive of but not limited to:

- internet sites for the accommodation sites subject to desk research;
- historical media coverage researched via the Dow Jones FACTIVA service, which permitted access to a wide range of newspapers, journals, magazines and television/radio transcripts;
- Published property consultants and town planners reports;
- Government reports inclusive of reports of governments inquiries;
- Client confidential reports prepared by property consultants or valuations firms or town planners and where the client consented to release a copy of the report to the authors of this study;
- Interviews with key figures in the PBSA sector – mostly within the large property consulting firms active within the student accommodation sector but also inclusive of PBSA site operators with long experience in the sector;
- University and affiliated residential college annual reports;

- Development Approval (DA) applications for construction of new PBSA places, lodged with local government and where the DA applications were in the public domain;
- reports on the university sector by state auditors' general.

Review panel

The draft report was subject to a review panel consisting of representatives from each of UCA, AACUHO and the Australian Government Department of Education and Training.

Number of sites

A single site can potentially include at the election of the survey respondent, multiple buildings in different parts of the same campus. Some respondents opted to count the entire campus's accommodation supply as a single site. Other sites differentiated between each individual accommodation building on the campus with the result that they reported multiple sites for the campus.

This is not considered to be a material issue as much of this report's data is presented in the form of 'places' rather than 'sites'. Whether a group of residences is classified as a single site or multiple sites does not affect the number of places that are being reported on.

Beds v Places

'Places' is the preferred term for the number of beds for the purposes of this report. Colleges and halls of residence generally prefer the term 'places' over 'beds' whereas the reverse generally applies amongst the commercial student accommodation providers. Some previous reports have used the term 'beds'. There is no notable difference between the meanings of these words for the purposes they are used within this report.

Vacancy Rates

The survey did not ask respondents about vacancy rates. In this and in other studies respondents have generally shown a reluctance to disclose this information, given its commercial sensitivity.

The survey asked respondents to report the number of places they have at each site. It did not ask respondents to report the total number of students living in the site at the time the survey was completed, because that information if provided can at times be used to calculate a vacancy rate.

Field testing of an early version of the survey identified that when respondents were asked what percentage of their residents were of a certain type, an unacceptably high proportion of respondents answered the question with the number (rather than the percentage) of the residents that where of that type. Hence the final survey asked these questions by reference to the number of residents rather than the percentage of residents that were of a certain demographic or type.

To ensure respondents were not required to divulge vacancy rates (even indirectly), the questions on student demographics were asked in such a way that the total number of students in residence could not (in general) be determined.

To the extent there are vacancies at the site, the above approach causes under-reporting of the percentage of places that are occupied by students of a certain type.

For example, if a site with 200 places, 10 of which are vacant, reports they have 50 international students and in addition has 140 (unreported) domestic students, then the true percentage of internationals in residence should be calculated as 50*100/(50+140) = 26.3 per cent.

Without knowledge of the number of domestic students and on the (mistaken) assumption of full occupancy the percentage of internationals would be calculated at 50*100/200 = 25.0 per cent.

The survey asked respondents to report the number of students in residence who were female (if co-ed), undergraduates, internationals and indigenous or Torres Strait Islander.

Given the above, the percentages given in this report for females, undergraduates, internationals and indigenous or Torres Strait Islander will be somewhat understated.

The extent of vacancies in the sector overall is not considered sufficient to cause errors of more than a few percentage points on the above demographics. For example where this report (Chapter 4) calculates the percentage of places occupied by international students nationally to be 40 per cent, the figure that would have been obtained had vacancy rates been disclosed is not considered to be any more than 42 per cent.

Vacancy rates are generally higher later in the academic year than they are at the start of the academic year. This is due to: (1) a percentage of students withdrawing from their university (dropping out)[49] part way through the year and where the vacancy is at times not filled until the next academic year; and (2) Australian domestic students who elect to study abroad for a semester, with the majority in residence in Australia for the first semester and away overseas in the second semester.

This survey was conducted late in the academic year (over September/October 2014) and accordingly the vacancy rates would have been higher than if the survey was conducted at the start of the academic year.

There are patches of systemic or year-long vacancies in the sector in addition to the vacancies caused by students dropping out part way through the academic year. Care has been taken to ensure the reporting of student demographics in this report is not based upon any data sets where there are known to be high vacancy rates (for that data set overall).

Identifying 'mobile' students

This report examines the numbers and sources of 'mobile' higher education students in need of accommodation during the academic term.

On-shore full-time internal-mode higher education international students and all Australian domestic full-time internal-mode higher education students whose permanent home address is overseas or who live in a different state or territory to their chosen university in Australia, are considered to be 'mobile' students.

Where Australian domestic full-time internal-mode higher education students have a permanent home address in the same state or territory as their chosen university, they are considered to be 'mobile' students if their permanent home address postcode is more than 60 kilometres as the crow flies from their campus postcode.The choice of 60 kilometres as an indicator of when a student is no longer within a reasonable daily commuting distance of campus was made after having regard for likely commute times and costs and after considering the paper by Blakers (2003).[50]

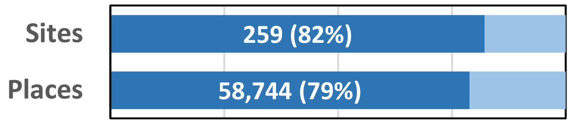
49 Coates, H *et al* 2011. The paper quantifies the level of departure intentions for selected fields of education.
50 Blakers, R *et al* 2003. The paper includes analysis on the distance of the permanent home address from campus as a factor which influences students to leave home to attend university.

4 RESULTS OF THE 2014 CENSUS

Overall response rates to the survey

The overall response rates to the survey part of the 2014 Census are shown in Figure 4.

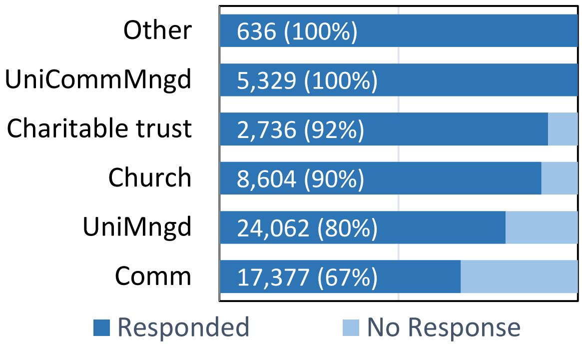
Figure 4: Response rates – overall by site count and by place count



The 315 sites within scope nationally operate a total of 74,482 places. 259 (82 per cent) of sites responded. The responsive sites operate 58,744 (79 per cent) of the places nationally.

The response rates varied between different ownership and management types of sites as shown in Figure 5.

Figure 5: Response rates – overall by ownership and management type and by place count



There were generally stronger response rates from the on campus sites, which achieved at or above 80 per cent by places.

The lowest response rate nationally was from the commercially owned and operated (**Comm**) sites, which achieved 68 per cent by places.

Considering the survey was distributed by unsolicited email and the 315 separate sites were not compelled to respond to the survey, an 82 per cent response rate by site count is an acceptable outcome.

Given the extent to which organisations have become survey weary in recent years, it is unlikely the 82 per cent response rate for this survey would have been achieved were it not for the public expression of support from the Department, the involvement and support of the relevant peak higher education sector bodies (UCA, AACUHO and Universities Australia), and the engagement of the three largest commercial student accommodation providers nationally.[51]

A comparable US survey in 2014 received a response rate of 18 per cent.[52]


Image: courtesy of Queen's College on flickr, CC BY 2.0

51 The three largest commercial student accommodation providers nationally are Campus Living Villages (CLV), UniLodge and Urbanest (as at the time of writing).

52 Frame, A *et al* 2014. This recent USA based 2014 ACUHO-I Construction Survey (which covered a similar topic, new places in the pipeline, to the final part of this survey) contacted 1,373 USA and international (including a number of Australian) student accommodation providers or sites (of which 957 were ACUHO-I members) and achieved a response rate of 18 per cent by site count (246 out of 1,373 sites responded).

Location and number of places

Location by state and capital city

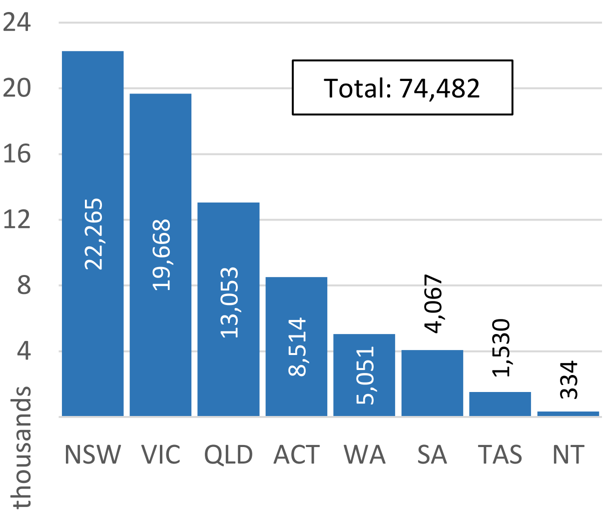
A summary of the responses to all of the survey questions, inclusive of the response rate for each question, is provided in Appendix F: *Summary of survey responses*.

Survey respondents reported a total of 58,744 places. Desk research identified a further 19,738 places giving a national total of 74,482 places within scope.

Figure 6 gives a breakdown of the overall national tally of 74,482 places by state. New South Wales (**NSW**) has the largest number of places, at 22,479.

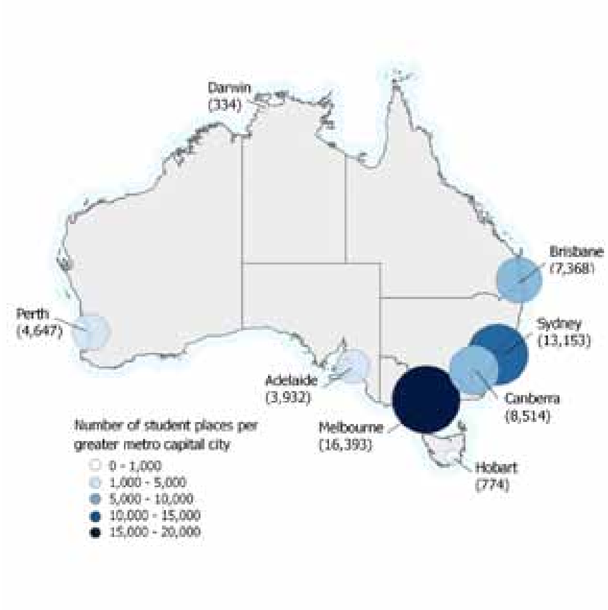
Melbourne has the largest number of places of any of the greater metropolitan capital cities, with 16,393 places. Sydney has 13,153. See Figure 7 and on page 28 see Figure 14.

Figure 6: Location of places – by state



Surprisingly for a state or territory with less than three per cent (by EFTSL) of all public university students nationally[53], the Australian Capital Territory (**ACT**) has the fourth largest number of places of any state and territory. The places in the ACT are 91 per cent of the places in Western Australia (**WA**) and South Australia (**SA**).

Figure 7: Locations of student places by greater metropolitan capital cities



To put the number of places by state into context, Figure 8 at page 24 gives the number of places by state as a percentage of the sum of the international students and the domestic mobile students in each state. The sum of these two groups (international and domestic mobiles) is a rough (though understated) proxy for the number of 'mobile' higher education students.

The 'mobile' university students who have a propensity to live within these places can be broken down into four distinct groups:

1. On-shore full-time higher education internal-mode international students (internationals) who leave their home country to study towards a degree in Australia (not including off-shore domiciled Australian citizens);

53 Table(ii)(c) of the 2013 Full Year Student Summary Tables in the Australian Government Department of Education and Training Higher Education statistics collection which as of 16 December could be accessed at: https://education.gov.au/selected-higher-education-statistics-2013-student-data.

2. Australian domestic full-time higher education internal-mode students who must leave their permanent home address and either:
   - live in a different state or territory (domestic interstates) to attend their chosen university in Australia (for example a student whose permanent home address is in Perth and who relocates during term to live in Townsville to study at James Cook University); or
   - live in a different city or region within the state (domestic intrastates) of their permanent home address to attend their chosen university in their state (for example a student whose permanent home address is in Mildura and who relocates during each term to live in Melbourne to study at Monash University);

3. Australian domestic full-time higher education internal-mode students whose permanent home address is within commuting distance (considered generally to be less than 60 km as the crow flies) of their chosen university within their state (metropolitan residents) (for example a student whose permanent home address is in Malvern in metropolitan Melbourne who chooses to live during term in Newman College at The University of Melbourne in Parkville);

4. Australian domestic full-time higher education internal-mode students whose permanent home address is outside Australia who must leave their overseas home to attend their chosen university in Australia.

The sum (the mobiles) includes the domestic intrastates, which in all states and territories except the ACT and Northern Territory (NT) are greater in numbers than the domestic interstates. The sum does not include the metropolitan residents.

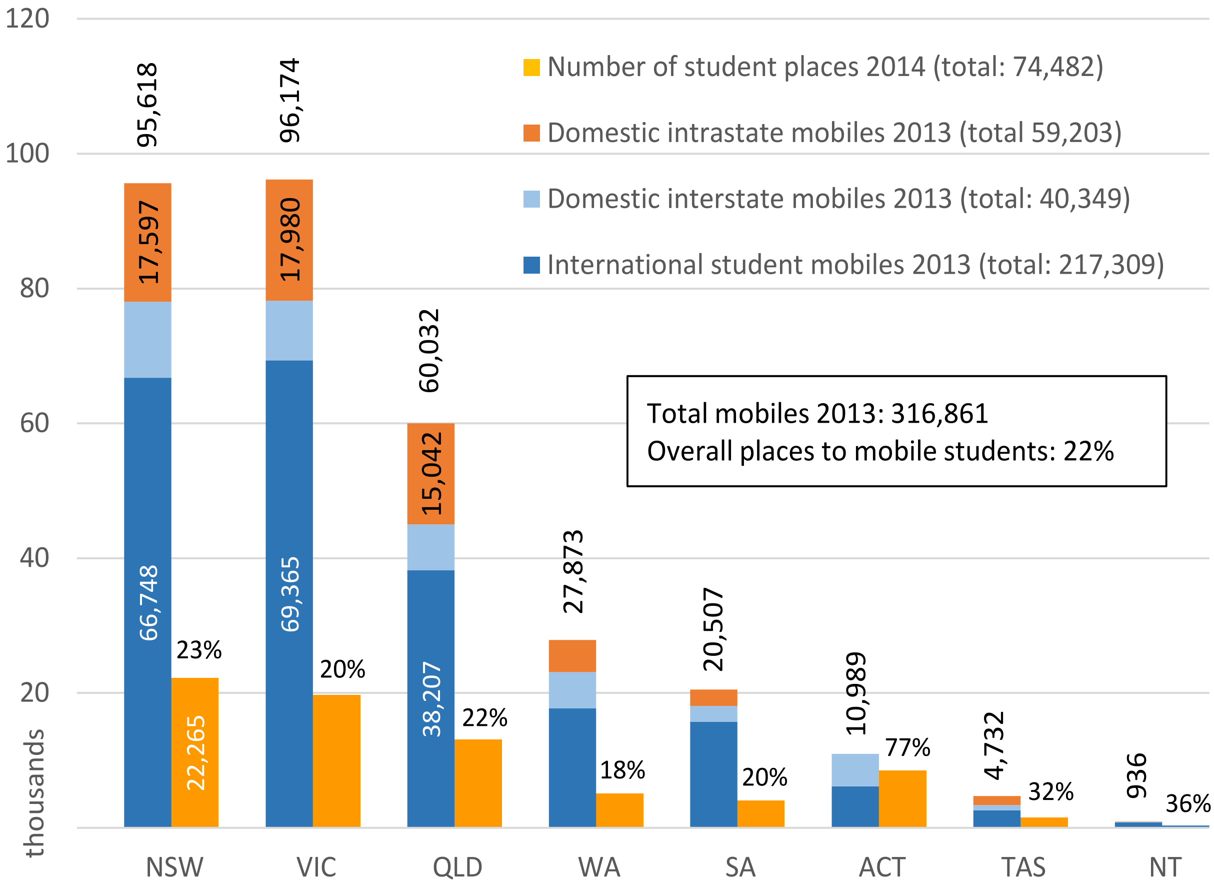
The higher education internationals in Figure 8[54,55] include the on-shore international students from the non-university higher education sector (NUHEP sector) and to that extent likely overstate the true number of internationals at universities by about nine per cent.[58] This overstatement is counter-balanced in part by the non-inclusion in Figure 8 of the metropolitan residents.

54 In Figure 8 the domestic interstate figure includes all internal-mode, full time, domestic, higher education students whose permanent home address is outside Australia. The domestic intrastate and interstate mobile student numbers exclude higher education students who are any of: (a) internal-mode part-time; (b) external-mode full-time and part-time; (c) multi-modal full-time and part-time; (d) those whose permanent home residential address is not known; and (e) those who are studying at campuses in multiple states. International student and domestic mobile student numbers are from the Department of Education and Training. Refer to RFI: 15-004 Nerlich (Appendix G in this report).

55 Values for Figure 8: Number of student places 2013 from Appendix G, Table G2: NSW: 22,265; VIC: 19,668; QLD: 13,053; WA: 5,051; SA: 4,067; ACT: 8,514; TAS: 1,530; NT: 334 (Total 74,482). Domestic intrastate mobile students 2013 from Appendix G, Table G2: NSW: 17,597; VIC: 17,980; QLD: 15,042; WA: 4,793; SA: 2,422; ACT: 0; TAS: 1,331; NT: 38 (Total 59,203). Domestic interstate mobile students 2013 from Appendix G, Table G2: NSW: 11,273; VIC: 8,829; QLD: 6,783; WA: 5,352; SA: 2,354; ACT: 4,808; TAS: 832; NT: 118 (Total 40,349). On-shore internal-mode higher education international student mobiles 2013 from Appendix G, Table G2: NSW: 66,748; VIC: 69,365; QLD: 38,207; WA: 17,728; SA: 15,731; ACT:6,181; TAS: 2,569; NT: 780 (Total 217,309).

56 Group of Eight Australia, 2014. p4.

Figure 8: Supply of places as a percentage of the number of mobile students – by state



The VET, ELICOS and non-award international students (which in 2012 accounted for 208,036 students nationally)[57] may not be able to as readily access the on campus places as the higher education international students, but they are no doubt welcome at the off campus commercial student accommodation provider sites (Comm – Off Camp).

To the extent the VET, ELICOS and non-award international students are able to access the off campus commercial provider sites, this will reduce the number of places available to the higher education 'mobiles'.

Location by suburbs, postcodes and electorates

The location of student places is concentrated in certain suburbs, postcodes and federal electoral divisions as shown in Tables 1, 2 & 3 on page 25.

The highest concentrations of places by suburb are Carlton (VIC), Burwood (VIC) & St Lucia (QLD); by postcode are 2601 (Acton, Bruce and Canberra, ACT), 3053 (Carlton, VIC) & 3125 (Burwood, VIC); and by federal electoral division are Fraser (ACT), Melbourne (VIC) & Sydney (NSW).


Image: courtesy of Brayden McLean on flickr, CC BY 2.0

57 Chaney, M 2013. Table 6 at p29.

Top ten suburbs/cities

Table 1: Top ten suburbs in which places are located (22,298 out of 74,482)

Suburb	Postcode/state in which suburb is located	Places
Carlton	3053 (VIC)	3,309
Burwood	3125 (VIC)	3,250
St Lucia	4067 (QLD)	2,929
Adelaide	5000 (SA)	2,359
Parkville	3052 (VIC)	2,358
Canberra	2601 (ACT)	2,060
Monash University	3800 (VIC)	1,800
Acton	2601 (ACT)	1,472
Kensington	2052 (NSW)	1,427
Bruce	2601 (ACT)	1,334
TOTAL		22,298

Top ten postcodes

Table 2: Top ten postcodes in which places are located (27,381 out of 74,482)

Postcode	Suburbs/cities in postcode	Places
2601	Acton, Bruce, Canberra (ACT)	4,866
3053	Carlton (VIC)	3,309
3125	Burwood (VIC)	3,250
4067	St Lucia (QLD)	2,929
2052	Kensington, Sydney, UNSW (NSW)	2,579
5000	Adelaide (SA)	2,359
3052	Parkville (VIC)	2,358
2617	Acton, Belconnen, Bruce, Canberra	2,038
6009	Crawley, Nedlands (WA)	1,893
2800	Monash University (VIC)	1,800
TOTAL		27,381

Top ten federal electoral divisions

Table 3: Top ten federal electoral divisions in which places are located (out of 74,482)

Electoral Division	**AEC profile of electoral division**	**Places**
Fraser (ACT)	http://www.aec.gov.au/profiles/act/fraser.htm	8,514
Melbourne (VIC)	http://www.aec.gov.au/profiles/vic/melbourne.htm	7,239
Sydney (NSW)	http://www.aec.gov.au/profiles/nsw/sydney.htm	5,381
Chisholm (VIC)	http://www.aec.gov.au/profiles/vic/chisholm.htm	5,050
Kingsford Smith (NSW)	http://www.aec.gov.au/profiles/nsw/kingsford-smith.htm	4,026
Adelaide (SA)	http://www.aec.gov.au/profiles/sa/adelaide.htm	3,274
Ryan (QLD)	http://www.aec.gov.au/profiles/qld/ryan.htm	3,117
Cunningham (NSW)	http://www.aec.gov.au/profiles/nsw/cunningham.htm	2,159
New England (NSW)	http://www.aec.gov.au/profiles/nsw/new-england.htm	2,034
Curtin (WA)	http://www.aec.gov.au/profiles/wa/curtin.htm	1,893
TOTAL		42,687

Regional/Metropolitan

Overall nationally, 19 per cent of places are in sites in regional locations. See Figures 9 and 10.

The definition of what is regional and what is metropolitan for these purposes is provided in *Appendix A* and is applied based on Australian Bureau of Statistics (ABS) criteria at the campus level rather than at the university level. These definitions have been approved by the Department of Education and Training.

Figure 9: Location (regional/metropolitan) of places – nationally

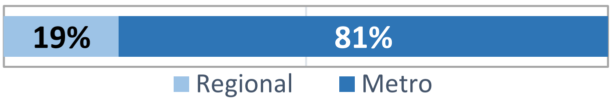


Figure 11 shows[58] for each state the total number of places in sites in regional locations compared to the total number of places in sites in metropolitan locations.

By a significant margin, New South Wales has the largest number of places in regionally located sites, with 5,689 places compared to the next largest state by this measure, Queensland, which has 3,618 places. Furthermore New South Wales and Western Australia both have a materially higher percentage of places in sites in regional locations relative to the total regional EFTSL for the state, at 36 per cent and 40 per cent respectively, compared to the other states.

Figure 12 on page 27 shows[59] the number of places in regional sites for each state expressed as a percentage of the EFTSL at regional campuses in that state.[60] New South Wales has the largest percentage of places in regional sites relative to regional EFTSL, by a significant margin.

Figure 10: Number of places at regional sites – by state

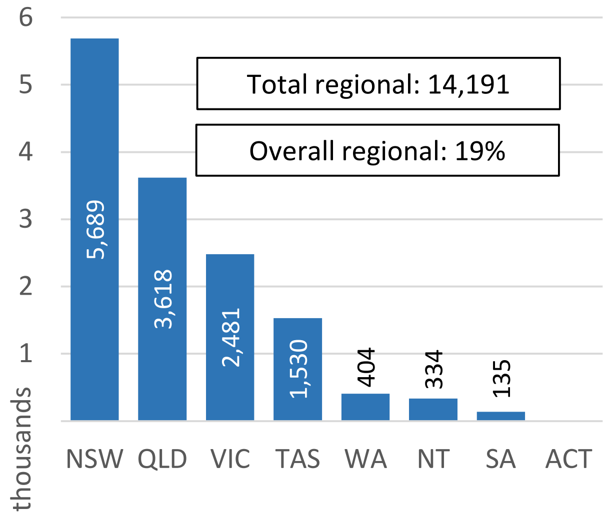
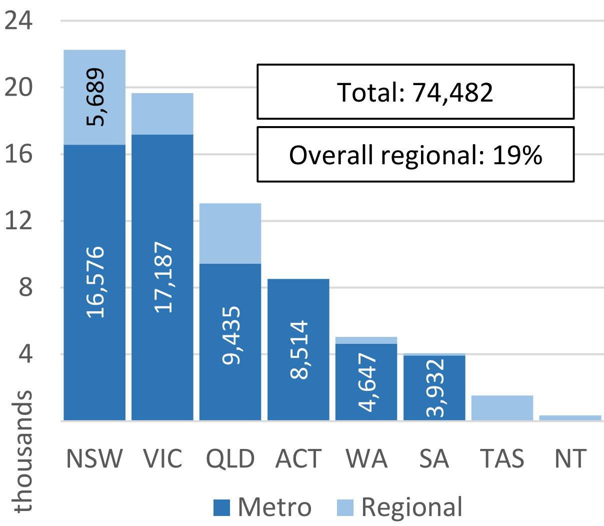


Figure 11: Breakdown of places between regional and metropolitan – by state

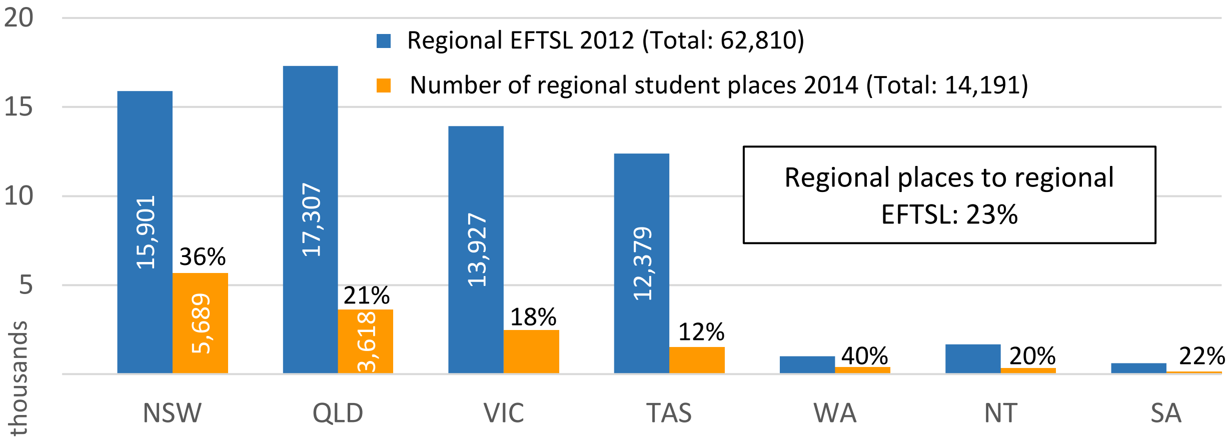


58 Values for Figure 11: Metropolitan places: NSW: 16,576; VIC: 17,187; QLD: 9,435; ACT: 8,514; WA: 4,647; SA: 3,932; TAS: 0; NT: 0. Regional places: NSW: 5,689; VIC: 2,481; QLD: 3,618; ACT: 0; WA: 404; SA: 135; TAS: 1,530; NT: 334.

59 Values for Figure 12: Regional EFTSL 2012: NSW: 15,901; QLD: 17,307; VIC: 13,927; TAS: 12,379; WA: 1,013; NT: 1,674; SA: 609. Number of regional student places 2014: NSW: 5,689; QLD: 3,618; VIC: 2,481; TAS: 1,530; WA: 404; NT: 334; SA: 135.

60 The Department of Education and Training, Higher Education Statistics, University Statistics Section provided a list of university campuses in Australia with EFTSL in each case for the 2012 year. Regional EFTSL are determined based on postcode of university campus (see Appendix A).

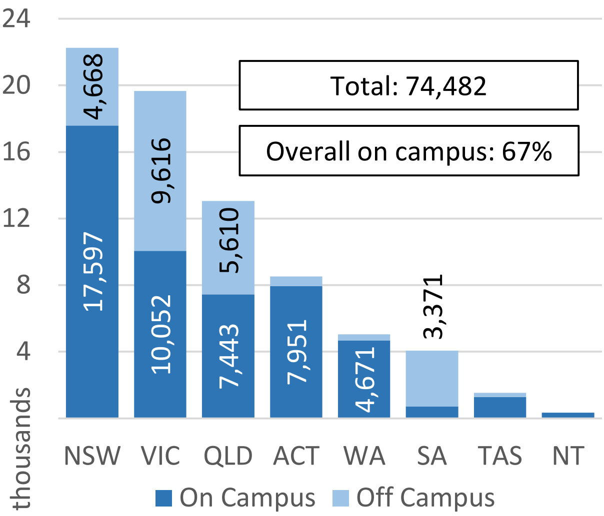
Figure 12: Number of places at regional sites as a percentage of regional EFTSL – by state



On/off campus

Figure 13 shows for each state the total number of places that are in on campus versus off campus sites.[61,62] Overall nationally, 50,018 places (comprising 67 per cent of the total) are on campus. New South Wales has more places on campus than Victoria and Queensland combined.

Figure 13: Location of places – by on/off campus – by state



The number of on campus sites is a very rough, though understated, proxy for the extent to which the universities, the church owned or affiliated colleges and the charitable trust owned sites have the underlying freehold (land) title (whether in trust or otherwise) of all sites in the sector.

Greater metropolitan capital cities

Figure 7 on page 22 and Figure 14 on page 28 show the total number of places in each of the greater metropolitan capital cities. Melbourne (**MEL**) has the largest number of places, at 16,393 eclipsing Sydney (**SYD**) which has 13,153.

The greater metropolitan capital city boundaries used for these purposes are from the Australian Bureau of Statistics (ABS) and for the three largest capital cities in Australia, are provided in Appendix H.

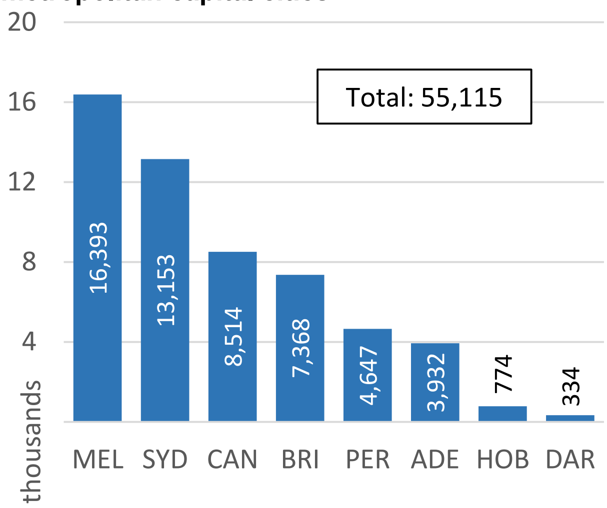
Canberra has the third largest number of places of the capitals nationally, at 8,514.

Of the total places nationally 55,115 or 74 per cent are in the greater metropolitan capital cities.

61 For the purposes of this report the term 'on campus' refers to sites which are located either on the university campus or directly adjacent to it. Survey respondents were able to self identify whether sites were located on or off campus.

62 Values for Figure 13: On campus places: NSW: 17,597; VIC: 10,052; QLD: 7,443; ACT: 7,951; WA: 4,671; SA: 696; TAS: 1,274; NT: 334 (Total 50,018). Off campus places: NSW: 4,668; VIC: 9,616; QLD: 5,610; ACT: 563; WA: 380; SA: 3,371; TAS: 256; NT: 0 (Total 24,464).

Figure 14: Location of places – by greater metropolitan capital cities



University groupings

In the survey respondents were asked to identify the university that owns the student residence or with which the student residence is affiliated or at which the largest number of residents attend. Desk research was used to identify the relevant university in the cases of sites that did not respond to this question in the survey.

Where sites declined to identify one particular university with which they were associated or for the non-respondents where there was no single university that could be identified as being associated with that site, the site was recorded as being associated with universities generally in their city (for example, associated with various universities in Sydney). In Figure 56 on page 48 and Figure 69 on page 53 these cases are referred to as 'Multi".

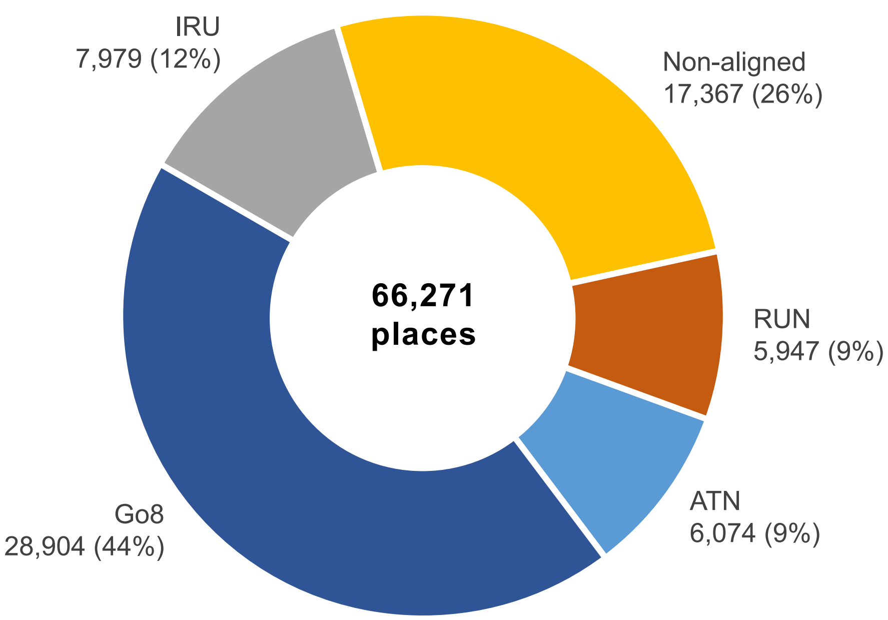
In total 66,271 or 89 per cent of the 74,482 places nationally could be associated for these purposes, with a single university in each case.

The number of places associated with member universities for each of the Go8, the Australian Technology Network of Universities (ATN), the Innovative Research Universities (IRU) and the Regional Universities Network (RUN), are shown in Figure 15.

A list of the member universities for each of the Go8, ATN, IRU and RUN groups is provided in Appendix I.

Of the 66,271 places that can be associated with a single university, 28,904 or 44 per cent are associated with a Group of Eight (Go8) university. As a point of interest note that Go8 conducted a survey in 2009 and reported there were 20,418 places associated with Go8 members.[63]

Figure 15: Places – by association with a member of one of the university groups in 2014



63 Group of Eight Australia, 2009. p9.

Figure 16: Higher education onshore international students compared to number of places associated with one of the university groups

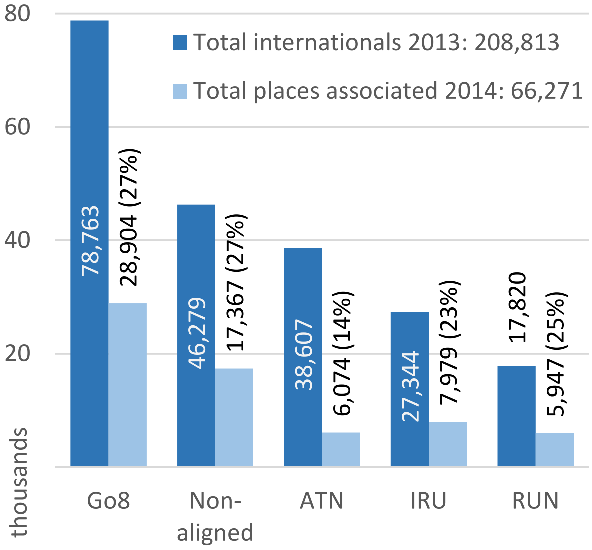
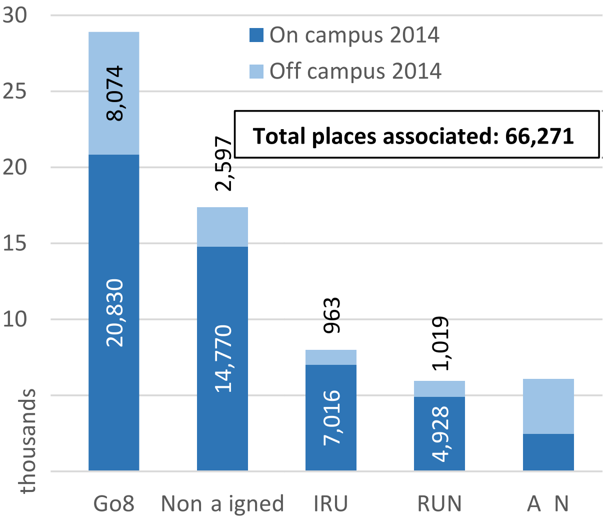


Figure 16 compares the number of places associated with one of the university groups in 2014 to the number of international students (onshore full-time internal-mode)[64] enrolled with university members of that university group in 2013.

The Go8 universities have the largest number of on-campus places by a significant margin. See Figure 17.[65]

Figure 17: Location of on-campus places – by university grouping



Ownership and management of sites

The state breakdown of the number of places by ownership and management type of the site operator is shown in Table 4 on page 30.

For a description of the ownership type codes used in Table 4 refer to Appendix L: *Abbreviations and terms*.

One way of looking at the extent of the different ownership and management types in the sector is to break places down into those where a university or another form of charitable institution owns the underlying freehold to the land on which the places are built, regardless of whether the operator of those places is a commercial (for profit) entity or a university or another form of charity.

In Table 4 all or nearly all except the off campus commercial student accommodation providers (Comm – Off Camp) and the small 'Other'category, are built on sites where a university or another form of charitable institution owns the underlying freehold to the land.

The cases where the underlying freehold is with a university or other charity account for about 55,908 places or about 75 per cent of the overall sector. Commercial entities or individuals own the freehold on the land on which the remaining 25 per cent of the places in the sector are built.

Looking at the sector on the basis of who has the underlying freehold ownership of the land on which places are built can potentially give an inflated view of the extent to which the sector is subject to unfettered governance by universities or other charitable entities.

64 The international student numbers for Figure 16 were obtained from the Department of Education Selected Higher Education Statistics Tables, Overseas students 2013, Table 7.5. International students numbers for 2013 and 2014 are also available from Australian Education International (AEI). The 208,813 number does not reconcile with the 217,803 number in Figure 8 because the former number excludes the international students at NUHEPS.

65 Values for Figure 17: On campus places: Go8: 20,830, Non-aligned: 14,770, IRU: 7,016, RUN: 4,928, ATN: 2,474 (Total 50,018). Off campus places: Go8: 8,074, Non-aligned: 2,597, IRU: 963, RUN: 1,019, ATN: 3,600 (Total 16,253). The grand total of 66,271 places excludes places with unknown or multiple university associations.

Where universities have entered into BOOT[66] schemes (for a description see *Appendix L: Abbreviations and terms*) they have at times alienated their freehold interest in the land on which the places are built, for terms of anything from 21 up to 40 years.

For all practical purposes, the places built on university lands via BOOT schemes are best regarded as coming under a public private partnership rather than being categorised under either 'public' vs 'private' or 'commercial' vs 'charitable'.

Nearly all of the BOOT scheme places in Table 4 fall under the heading of on campus commercial student accommodation provider (Comm – On Camp) but there are places that are not part of BOOT schemes under the Comm – On Camp heading as well.

Another way of looking at the extent of the different ownership and management types in the sector is to break places down into those where a commercial entity is the operator or manager. These are generally cases where the commercial entity owns the building and the land or where it has a head lease on the building(s) or where it has been contracted by a university to operate the places on behalf of the university under some sort of management services agreement.

In Table 4 all or nearly all except the university owned and managed (UniMngd) places, the church owned or affiliated places (Church), the Charitable trust places and about 36 per cent of the small "Other" category, are operated or managed by commercial entities.

Table 4: Number of places by ownership and management type – by state

Ownership Type	NSW	VIC	QLD	WA	SA	TAS	NT	ACT	Total
UniMngd	11,655	7,072	3,218	2,371	714	1,338	334	3,444	30,146
Comm – Off Camp	2,119	7,761	5,012	–	2,051	–	–	83	17,026
Church	2,441	2,171	2,534	749	816	192	–	674	9,577
Comm – On Camp	4,647	–	1,267	1,537	–	–	–	1,334	8,785
UniCommMngd	–	2,350	–	–	–	–	–	2,979	5,329
Charitable trust	1,172	314	1,022	394	81	–	–	–	2,983
Other	231	–	–	–	405	–	–	–	636
Total	22,265	19,668	13,053	5,051	4,067	1,530	334	8,514	74,482


Image: courtesy of Toby Hudson on flickr, CC BY-SA 3.0

66 BOOT – Build, Own, Operate, Transfer. See the more detailed definition in Appendix L.

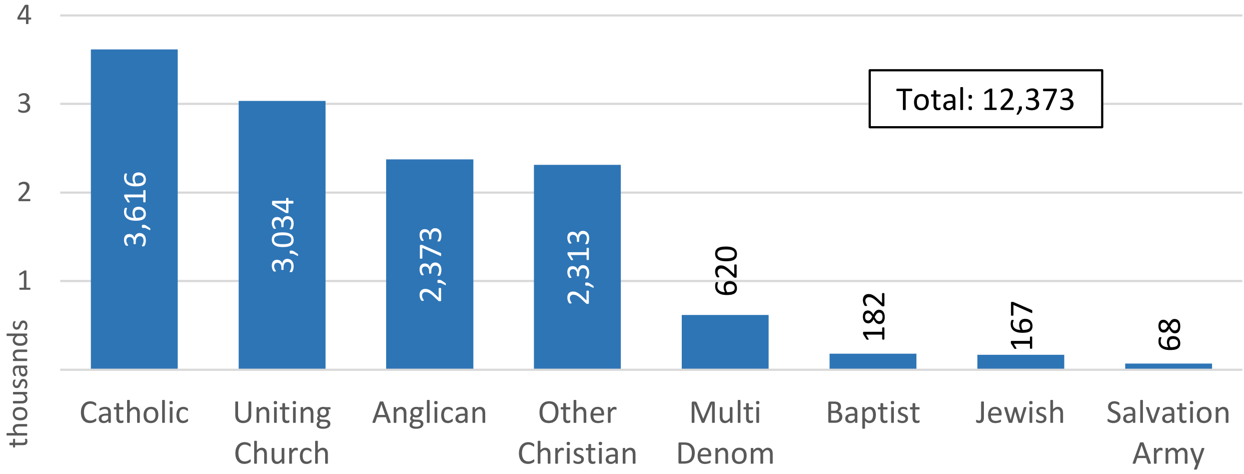
The cases where a commercial entity operates or manages the site(s) account for about 32,000 places or about 43 per cent of the overall sector. Universities or other charitable institutions operate the remaining 57 per cent of the places in the sector.

Under either way of looking at the ownership and management of the sector, whether on the basis of who owns the underlying freehold to the land or on the basis of who operates or manages the places, the part of the sector comprising the universities and other charitable institutions is the largest part.

As shall be seen in the following chapters the commercial entities share of the sector, whether by outright ownership or by way of partnership arrangements, is growing rapidly.

Religious affiliation

Figure 18: Number of places in sites with a religious affiliation – nationally



There are a number of sites that did not report in the survey as being under 'church owned or affiliated' ownership and management type but which nevertheless reported that they had an affiliation with a church in the question in the survey.

There are 12,373 places nationally (representing 17 per cent of the overall sector) that are in sites that have an affiliation to a church, regardless of their ownership or management type. See Figure 18 for a breakdown of this number into the different churches with which sites have an affiliation.

The Catholic church has the largest number of affiliated places nationally, followed closely by the Uniting Church.

When the 12,373 places that are in sites with a religious affiliation are broken down by state, Victoria has the largest number of church affiliated places. See Figure 19.

Figure 19: Number of places in sites with a religious affiliation – by state

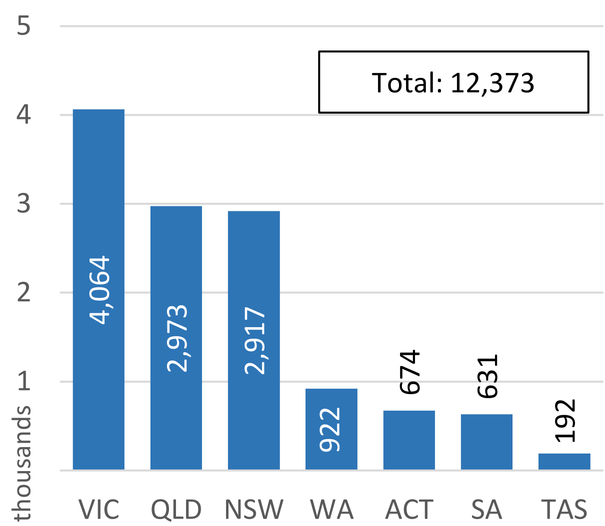


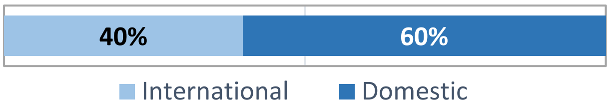
Figure 20: Not used

Demographics of residents

International students

International students occupy 40 per cent or perhaps somewhat more than that, of the 74,482 places nationally. See Figure 21.

Figure 21: Percentage of places occupied by international students – nationally



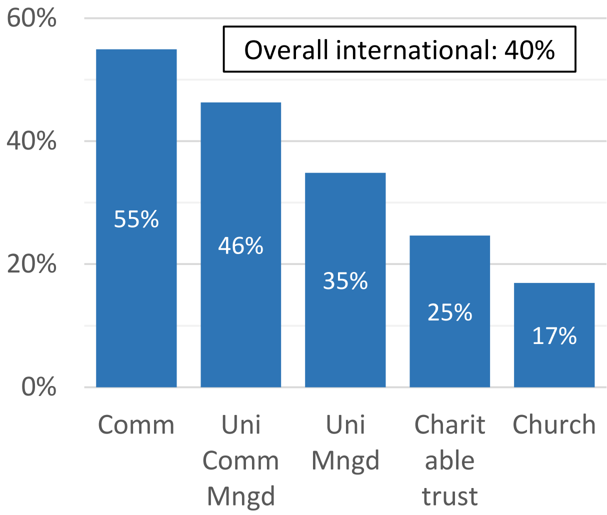
The proportion of international and domestic students at sites varies significantly across different site ownership and management types.

Commercial providers have the largest ratio of international to domestic students – with more than half of their places occupied by international students. At the other end of the scale, church owned or affiliated providers have only 17 per cent of their places occupied by international students. See Figure 22.

The church owned or affiliated providers (largely located in or near the capital cities and affiliated with the sandstones) in many cases accept students of all faiths. Nevertheless they either have a charter or constituent objects to provide collegiate residence to students of their faith (that is, the faith of that church) or have a long tradition of doing so primarily for students of their faith and whose permanent home address is in the regional areas for that state. In many cases this continues to result in the percentage of places occupied by international students being on the low side, relative to other ownership and management types of sites.

Many providers actively regulate the demographic and culture of the student cohort in residence.[67] These providers may be conscious of balancing the student demographic to maintain an Australian experience for the international students they accept. Others may be focused on creating a diverse environment – for example the international houses[68] which between them have an average of 60 per cent international residents.

Figure 22: Percentage of places occupied by international students by ownership and management type of site – nationally



There are large differences in the proportion of international and domestic students between the sites located in greater metropolitan capital cities and those in all other metropolitan or regional locations. See Figure 23 on page 33.

Sites in the major capital cities have far higher proportions of internationals (48 per cent or more) than those is the regional areas.

67 Powell, D 1997. Paper describes the extent to which the tertiary residential colleges in particular provide more than just accommodation – to create learning environments where values and friendships are developed and fostered.
68 The eight international houses are located at CDU, CSU, UniMelb, UNSW, UoW, UQ, USYD and UoN, and in addition there are Rotary International Houses located at each of JCU and Curtin.

Figure 23: Percentage of places occupied by international students by location of site – nationally

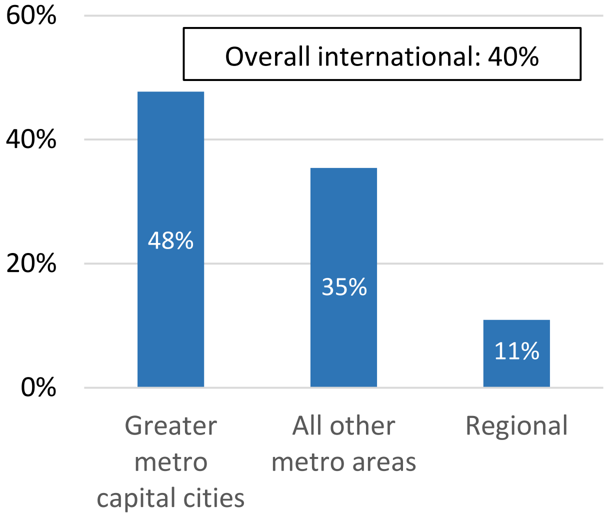
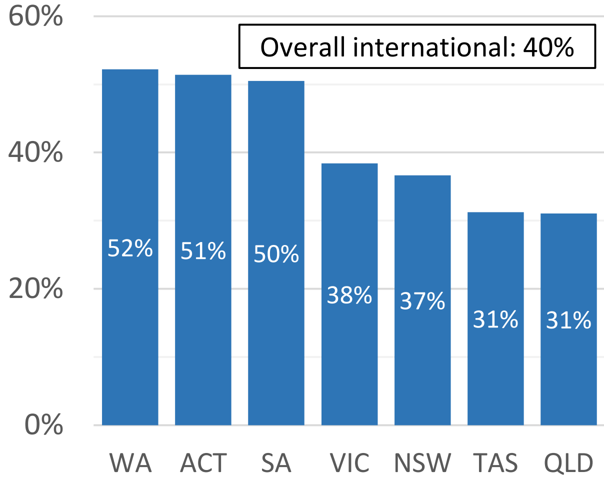


Figure 24: Percentage of places occupied by international students – by state



No responses for this section of the report, to do with internationals, were received from Northern Territory sites.

Western Australia, the Australian Capital Territory and South Australia have a higher proportion of overall places occupied by international students than the other states. See Figure 24.

In Western Australia and the Australian Capital Territory the percentage of on campus places occupied by international students is higher than for the other states. See Figures 24 and 25.

See Figure 26 on page 34 for the percentage of off campus places, by state, occupied by international students. There are lower percentages of international students in the off-campus places in the Australian Capital Territory, Western Australia and Tasmania, compared to the other states.

Figure 25: Percentage of on campus places occupied by international students – by state

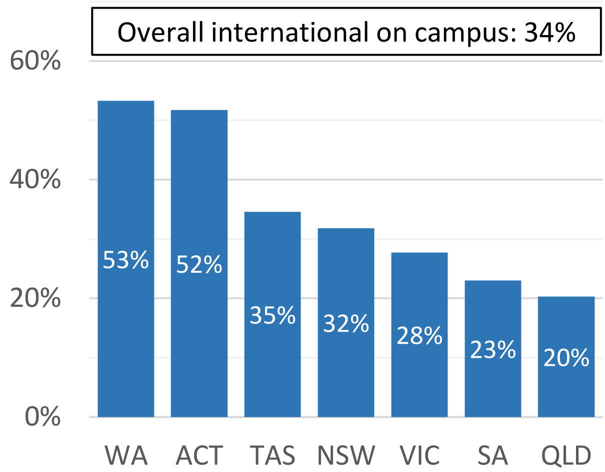


Figure 26: Percentage of off campus places occupied by international students – by state

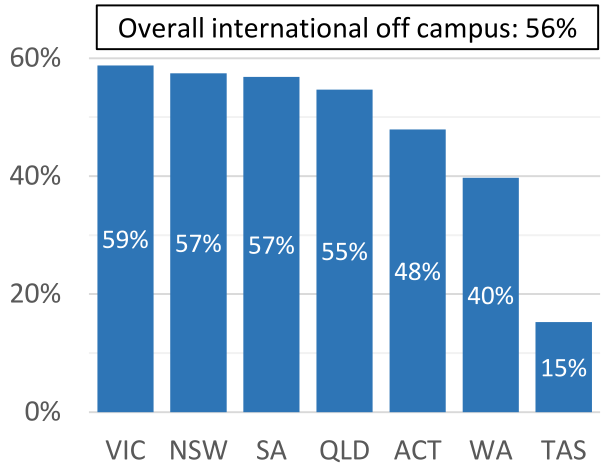
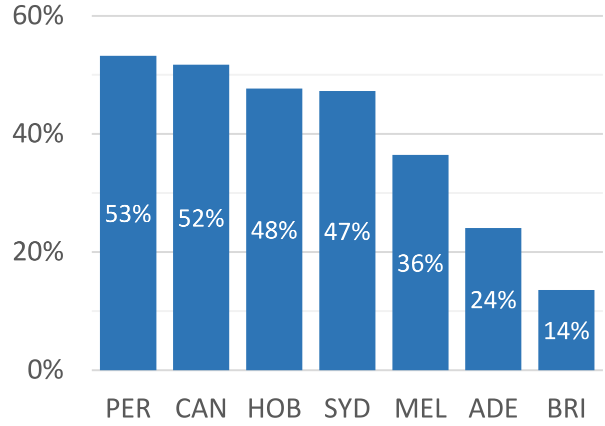


Figure 27: Percentage of on campus places occupied by international students by greater metropolitan capital city

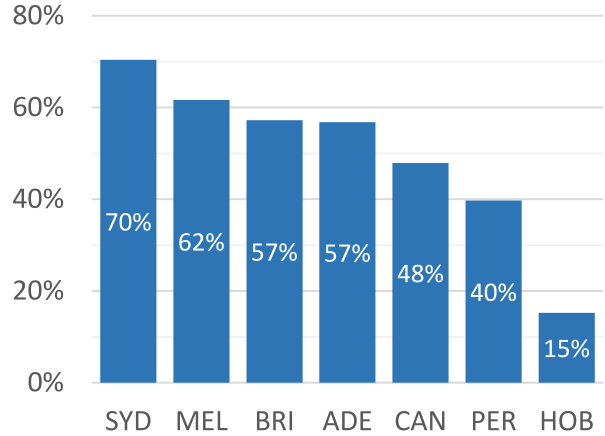


The percentage of on campus places occupied by international students in greater metropolitan Sydney is higher than is the case for Melbourne. See Figure 27.

Figure 27 also shows that in the greater metropolitan capital cities of Adelaide and Brisbane the percentage of on campus places occupied by international students is lower than for the other capitals.

Greater metropolitan Sydney has the highest percentage of off campus places occupied by international students of all the capital cities. See Figure 28.

Figure 28: Percentage of off campus places occupied by international students by greater metropolitan capital city

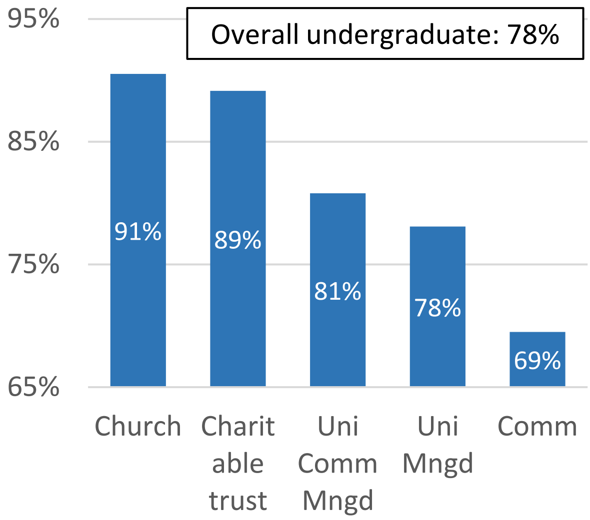


Postgraduate and undergraduate students

Of the total 74,482 places, there were 54,743 in sites where a response was given to the survey question on the number of undergraduates. Of these 54,743 there were 42,143 or 77 per cent, that were occupied by undergraduates.

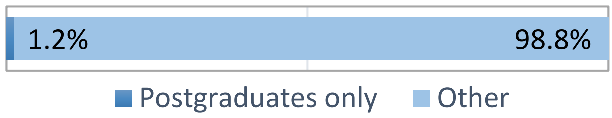
Figure 29 shows, for the places on which the undergraduate question was answered, how the undergraduate percentage varies by the ownership and management type of the site.

Figure 29: Percentage of places occupied by undergraduate students by ownership and management type of site – nationally



Desk research on non-respondents to this question did not determine the number of places occupied by under-graduates.

Figure 30: Percentage of places in sites that accept postgraduate students only



The sites that are owned by or affiliated with churches and the sites that are owned by charitable trusts have a higher percentage of undergraduates in residence than is the case for the other ownership and management types.

A total of 722 places or 1.2 per cent of the overall sector, are in sites that accept postgraduate students only. An example of such a site is Graduate House at the Australian National University (ANU) in Canberra. See Figure 30.

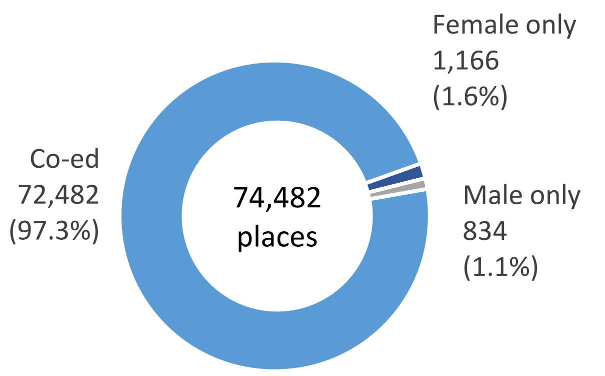
Many sites that provide for both undergraduates and postgraduates have separate wings or in some cases buildings, that cater solely for postgraduate students. An example of such a site is Queen's College at The University of Melbourne.

The survey did not look at the prevalence of postgraduate only wings or floors in sites that accept both undergraduates and postgraduates.

Single sex or co-ed sites

Single sex sites

Figure 31: Number of places in single sex or co-ed sites – nationally

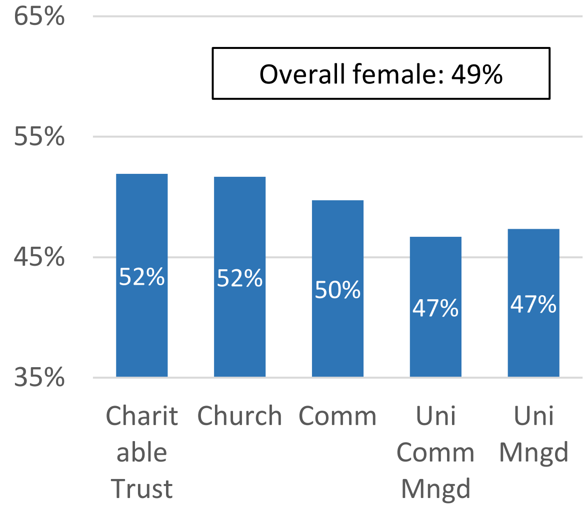


58,744 places responded to this question (out of 74,482). Desk research on non-respondents covered the issue of whether the places were in single sex or co-ed sites.

Single sex colleges provide less than 3 per cent of the places in the sector. There are more places in female only colleges than in male only colleges. See Figure 31.

Co-ed sites

Figure 32: Percentage of co-ed places occupied by female students by ownership and management type of site – nationally



Desk research on non-respondent co-ed sites did not cover the question of what percentage of residents were females.

The survey did not look at the prevalence of single sex floors in co-ed sites.

For the co-ed sites that operate communal bathrooms, the survey did not look at the extent to which the bathrooms were single sex.

For the 2013 full year more than half (55.6 per cent) of all higher education students were female.

Of the 50,244 places that were in co-ed sites where the site provided an answer (other than uncertain) to the survey question on how many of their residents were female, 24,451 or 49 per cent, were occupied by females.

Sites owned by charitable trusts have a higher proportion of females overall, than for other ownership and management types. See Figure 32.

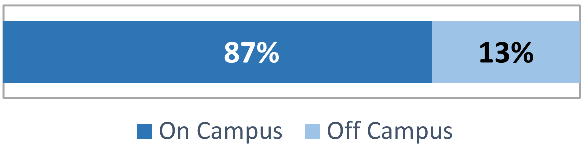
Indigenous and Torres Strait Islander students

Nationally about 2.2 per cent of the 74,482 places are occupied by indigenous or TSI students.

By comparison in 2012 there was 8,868 (or 1.1 per cent) indigenous and TSI EFTSL nationally out of 844,240 EFTSL for all students for all 39 universities.[69]

Relative to the other demographic groups in PBSA places a large percentage of the places occupied by indigenous and TSI students are on campus rather than off campus. See Figure 33.

Figure 33: Percentage of places occupied by indigenous or TSI students that are on campus – nationally



Overall nationally, 67 per cent of the 74,482 places are on campus but by contrast 87 per cent of the places occupied by indigenous and TSI students are on campus.

Sites owned and operated by charitable trusts report a higher percentage of indigenous and TSI students in residence than for the other ownership and management types. See Figure 34.

Western Australian sites overall have a significantly higher percentage of their places occupied by indigenous and TSI students than for any of the other states. See Figure 35.

Aside from policy positions adopted by individual universities in Western Australia, one possible contributory factor to WA's performance on the percentage of indigenous and TSI students in residence is that one or more of the site operators or colleges in Western Australia has been the recipient of donations to further indigenous education, from the mining sector.[70]

Figure 34: Percentage of places occupied by indigenous or TSI students by ownership and management type of site – nationally

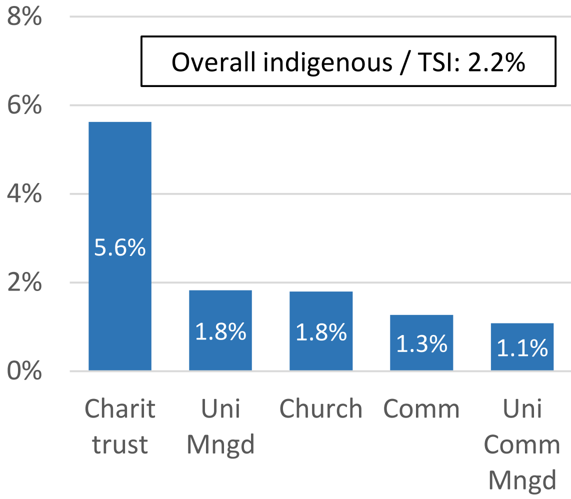
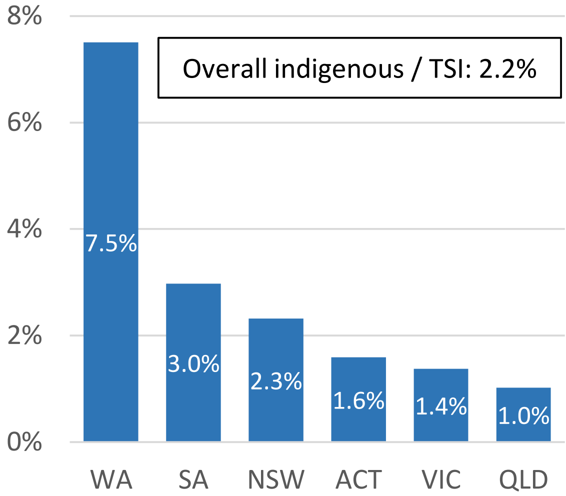


Figure 35: Percentage of places occupied by indigenous or TSI students – by state



69 The percentage of indigenous students is calculated using EFTSL data from the Department of Education and Training 2013 Selected Higher Education Statistics tables, available online at <https://education.gov.au/selected-higher-education-statistics-2013-student-data>. Total EFTSL for Australian universities is derived from the 2013 Full Year Student Summary, table (ii)(c) and the number of indigenous EFTSL is derived from the 2013 Indigenous students, table 6.3. Private universities and NUHEPS were excluded from both lists when calculating totals to ensure direct comparability of the figures.

70 An example of mining sector philanthropy for indigenous students in residential colleges is the July 2014 donation by Woodside Petroleum of 13 full degree scholarships to indigenous students residing at St Catherine's College at The University of Western Australia.

In Western Australia the mining industry continues to give funding to the residential college(s) to assist them in providing intensive (additional) tutorial assistance for the indigenous students in residence.[71]

The mining sector philanthropy to aid academic outcomes for the indigenous students has (generally) not extended to the colleges in the other states – at least not to the same degree as in Western Australia.

Further, nearly all of the sites in Western Australia that have accepted National Rental Affordability Scheme (**NRAS**) incentives have done so on condition that they will give priority to indigenous (and some other classes of) students when allocating NRAS places.

The Behrendt report (2012) documented many of the issues facing indigenous and Torres Strait Islander students when accessing the higher education system; not least of which were those regarding retention and progression rates.[72]

The key to increasing the number of indigenous and TSI students in residence is an increased academic retention and progression rate.

A number of residential colleges nationally report to the authors that they have higher academic progression and retention rates for their indigenous students in residence, than is the case for indigenous students who do not live in on campus accommodation.

Twenty nine per cent of the places responding to the survey and who answered the question on indigenous and TSI students were in sites where the operator or manager was uncertain how many indigenous or TSI students there were in residence at the site.

When the uncertainty of respondents on the indigenous question was broken down by the ownership and management type of sites, the commercial student accommodation providers (Comm) had the greatest uncertainty. The uncertainty reported by the sites that are university owned and managed (UniMngd) was also relatively high. See Figures 36 and 37.

Figure 36: Places which provided a response to the indigenous or TSI question – by ownership and management type

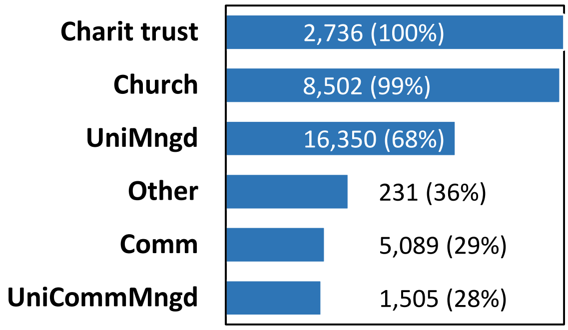
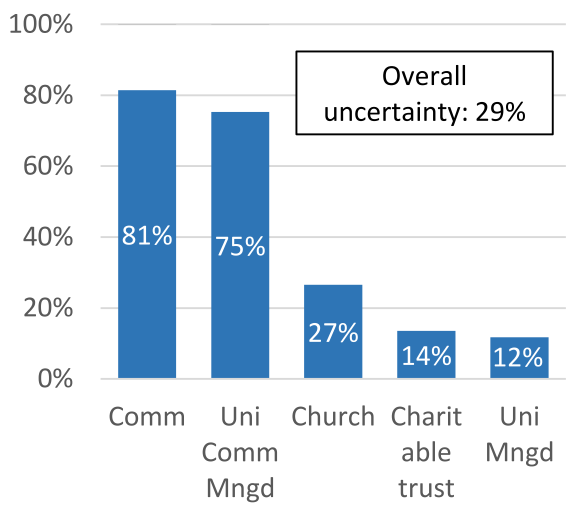


Figure 37: Percentage of places where the site operator was uncertain as to the number of indigenous or TSI students by ownership and management type – nationally



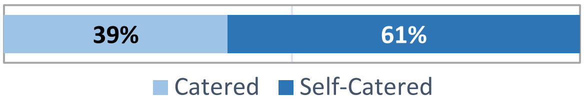
71 A further example of mining sector philanthropy for indigenous students in residential colleges is the donation from the Goodeve Foundation to St George's College at The University of Western Australia to create the Goodeve Indigenous Student Support Fund to provide financial support for indigenous students for expenses associated with their studies.

72 Behrendt, L *et al* 2012. p59.

Catering arrangements

A minority (29,160 places or 39 per cent) of places nationally are in sites that offer some form of catering. See Figure 38.

Figure 38: Percentage of places in sites offering catering – nationally



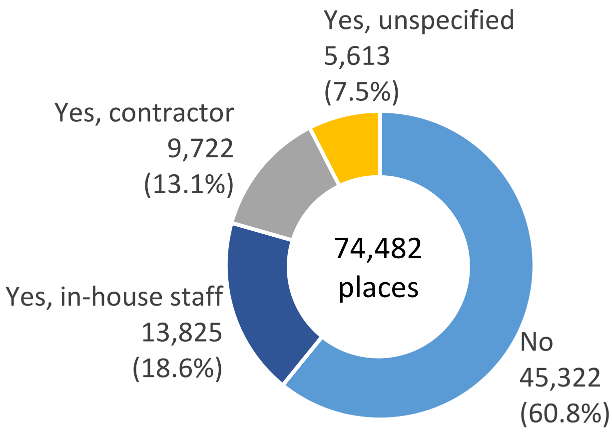
Non-respondents to the survey were identified as offering or not offering catering at their site via desk research.

The total estimated number of places nationally that are catered is 25,952 (calculated as 29,160 * 89.0 / 100). The basis for the calculation is that for the 29,160 places (derived from the survey plus desk research) in sites offering some form of catering it is estimated (from survey responses) that 89 per cent of the places are catered and the remaining 11 per cent of the places are self-catered.

Survey responses indicate that 41 per cent of the places in sites offering some form of catering are catered by contractors. The remaining 59 per cent are catered by in-house staff. See Figure 39.

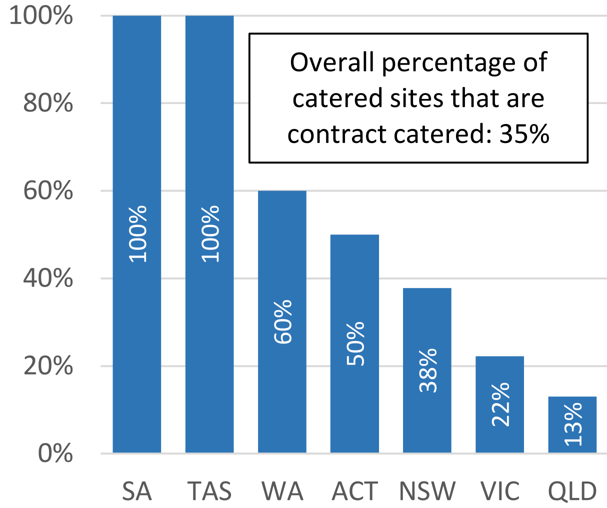
Image: courtesy of Ryan Wick on flickr, CC BY 2.0

Figure 39: Number of places in sites offering catering – nationally



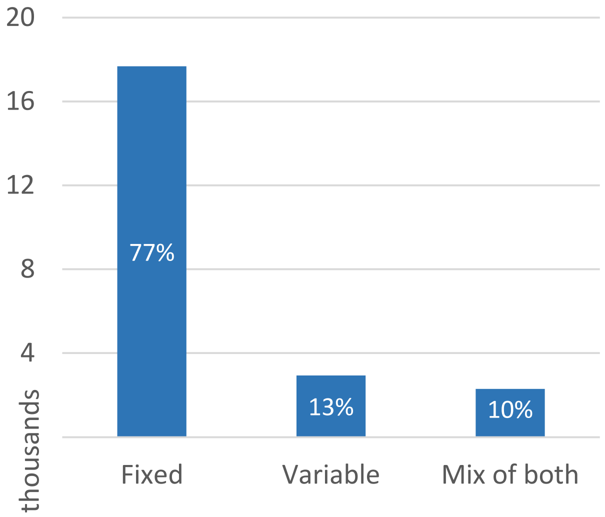
Put a slightly different way, survey responses indicate that for all sites nationally that offer some form of catering, 35 per cent are catered by contractors. The remaining 65 per cent are catered by in-house staff. Desk research was not available on this measure for the non-respondent sites. See Figure 40.

Figure 40: Percentage of catered sites that have outsourced (contract) catering – by state



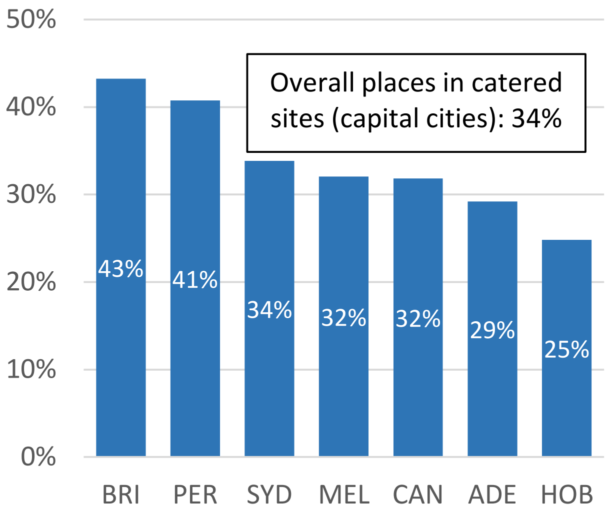
For the catered places in the sector the large majority at 77 per cent are catered on the basis of a fixed number of meals per week as distinct from coming under a variable meal plan or some mix of fixed and variable meal plans. See Figure 41.

Figure 41: Percentage of places in sites that specified whether catering was for a fixed or variable number of meals – nationally



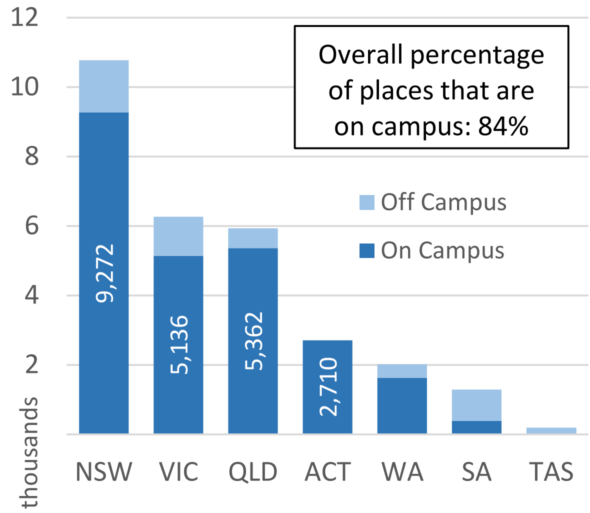
The percentage of places in sites offering some form of catering varies by greater metropolitan capital cities with Brisbane and Perth having the greater proportion of their places in catered sites than is the case for the other cities. See Figure 42.

Figure 42: Percentage of places in sites offering catering – by greater metropolitan capital city



The large majority, at 84 per cent, of places in sites offering some form of catering are on campus, in all states with the exception of South Australia. See Figure 43.[73]

Figure 43: Number of places in sites offering catering – by on/off campus – by state



The on/off campus balance of accommodation in South Australia has been attributed to Adelaide being a planned city, with limited land set aside for the University of Adelaide. Although student accommodation was envisaged at the foundation of the University of Adelaide, no land was set aside for this purpose.[74]

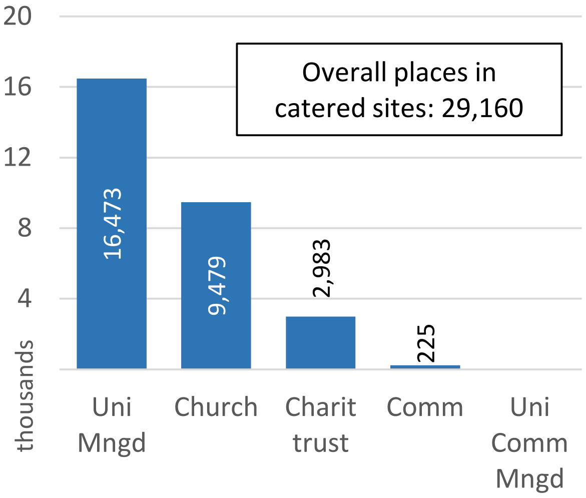
Very few (less than 1 per cent) of places in sites offering some form of catering, are commercially owned and managed. See Figure 44 on page 41.

About 64 per cent of all the places nationally that are in sites offering some form of catering are in the greater metropolitan capital cities compared to about 30 per cent that are in regional locations. See Figure 45 on page 41.

A greater proportion of the places in regional locations are in sites offering some form of catering, than is the case for places located in the greater metropolitan capital cities.

73 Values for Figure 43: On campus: NSW: 9,272; VIC: 5,136; QLD: 5,362; ACT: 2,710; WA: 1,631; SA: 387; TAS:0. Off campus: NSW: 1,497; VIC: 1,130; QLD: 566; ACT: 0; WA: 380; SA: 897; TAS:192 (Total 29,160).
74 Walker, I 2001. p125.

Figure 44: Number of places in sites offering catering – by ownership and management type of site – nationally



There is substantially more catering in the places associated with universities in the Group of Eight (Go8) group of universities than for the places associated with universities in other university groups. See Figure 46.

Figure 45: Number of places in sites offering catering by location of site – nationally

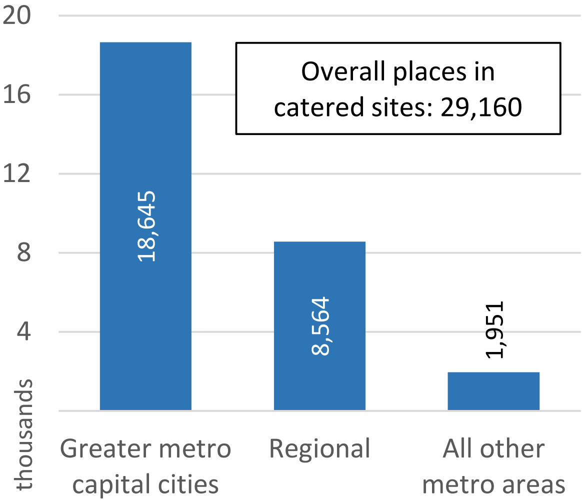
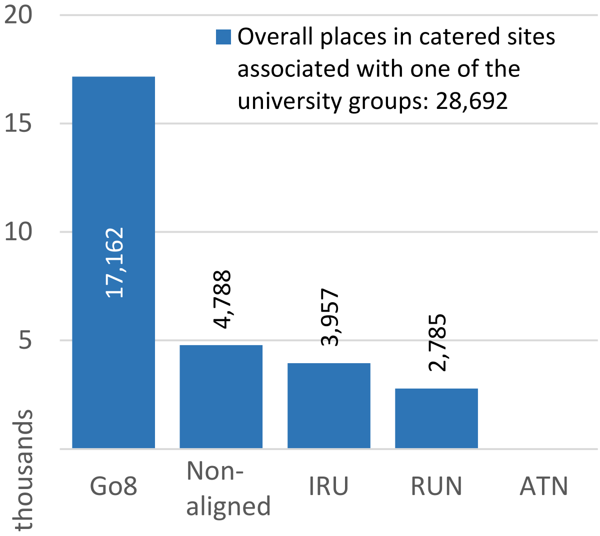


Figure 46: Number of places in sites offering catering by association with a member of one of the university groups



Accommodation styles and size of sites

There were 54,623 places that responded to the survey question on style of accommodation offered (out of 74,482). Desk research on non-respondents did not cover style of accommodation offered.

The dominant style of accommodation at 52 per cent, is communal bathroom (of which most would still be 'long corridor' – see the definition in Appendix L).

Private ensuites at 28 per cent are the second largest style of accommodation offered. See Figure 47.

The average site size nationally is 236 places. However if the places in the sector are ranked in order of site size the median place is in a site with 185 places.

The distribution of places across different site sizes is shown in Figure 48. The largest number of places are in the site size category comprising 201 to 300 places.

Figure 47: Room type breakdown – nationally

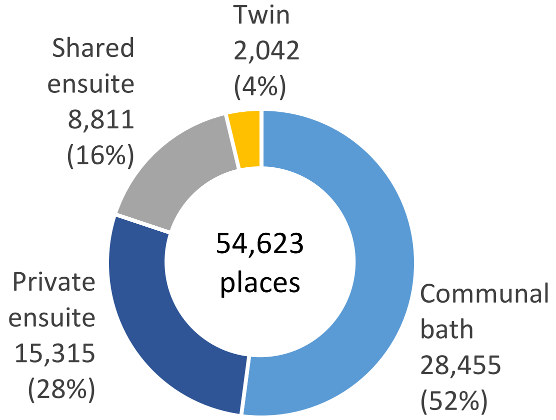
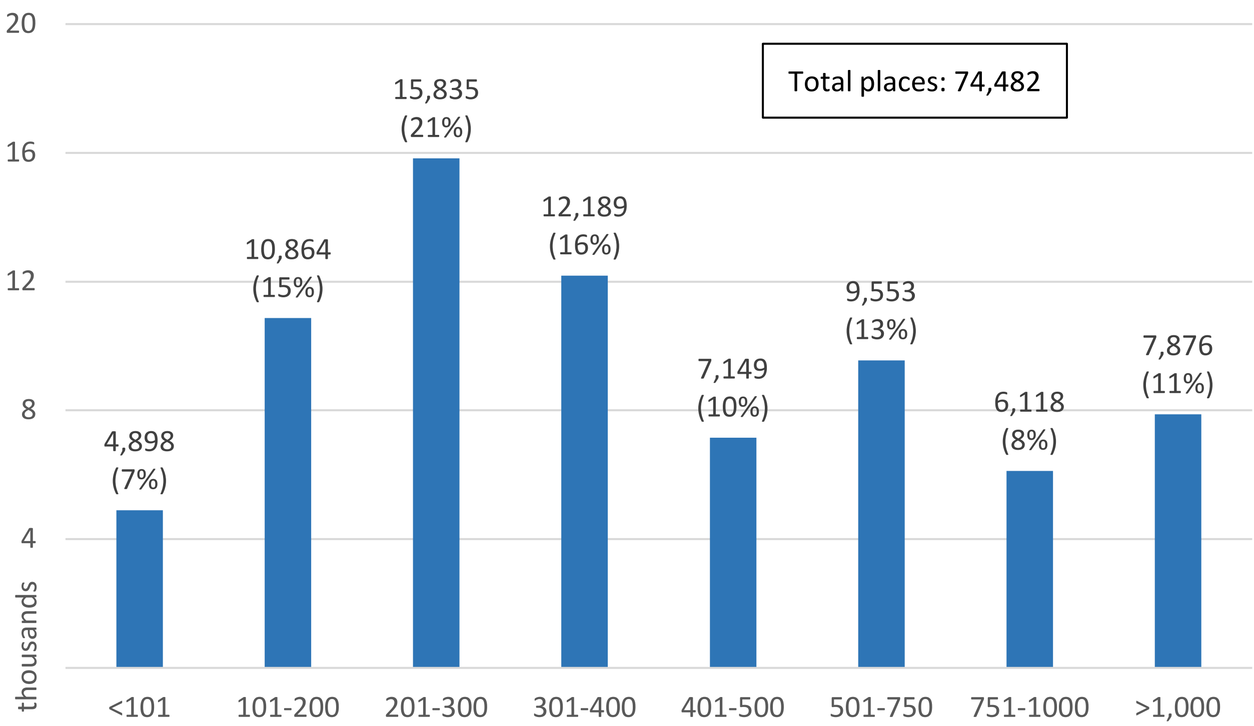


Figure 48: Number of places broken down by size of site – nationally



Comparison with the UK and USA destinations

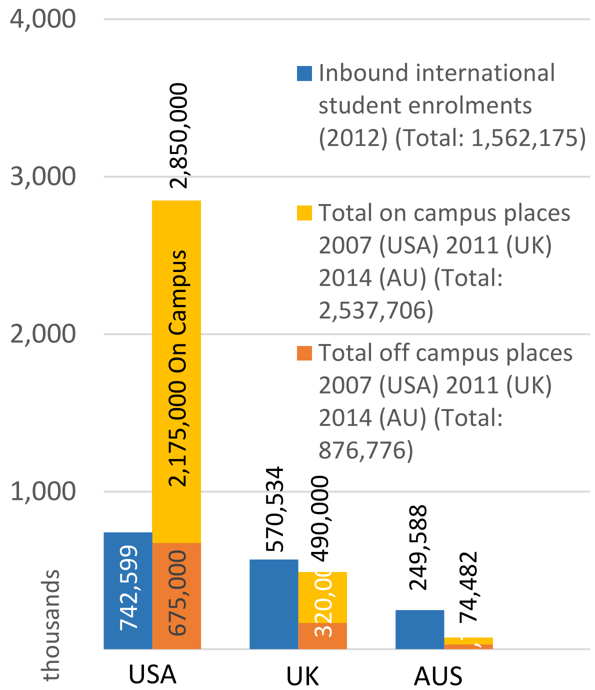
Australia is the fifth largest destination for international students after the USA, UK, Germany and France.

Figure 49 shows[75] for Australia compared to the top two study destinations of the USA and the UK, the number of PBSA places (broken down by on campus and off campus) compared to the number of inbound tertiary international students.

The inbound international student numbers are all for year 2012 and are sourced from UNESCO.[76]

The PBSA place counts for the USA are for the 2007 year and are sourced from Hogan in the USA and Hillman in the UK.[77,78,79] The PBSA place counts for the UK are for the 2011 year and are sourced from UNITE (which is cited by Hillman).[80,81] The PBSA place counts for Australia are for the 2014 year and are sourced from this report.

Figure 49: Tertiary education inbound international students compared to PBSA for each of USA, UK & Australia



75 Breakdowns for unlabelled bars for Figure 49: UK total on campus spaces 2011: 320,000; UK total off campus places 2011: 170,000; Australia total on campus places 2014: 42,706; Australia total off campus places 2014: 31,776.
76 UNESCO 2014, Table C4.4 at pp358–359 and Table C4.6 at p361. The 742,599 international student inbound figure for the USA is derived by taking the USA global market share of 16.4 per cent from Table C4.4 on page 359 and multiplying it by the worldwide number of foreign students in 2012 of 4,528,044 from Table C6.4 on page 361. The same process is used to obtain the 2012 UK and Australian inbound international student enrolments of 570,534 and 249,042 respectively.
77 Hillman, P *et al* 2012, citing Hogan (2007).
78 Hogan, D 2007. p2.
79 The USA has nearly 40 times as many PBSA places as Australia. With 2.85 million PBSA places (of which 2.175 million are on campus) the USA destination has a massively greater number of places than any of the competitor destinations for inbound international students.
80 Hillman, P *op cit* citing UNITE.
81 The UK has 490,000 PBSA places (of which 350,000 are on campus). The UK has more than 6.5 times as many PBSA places as Australia but only (very roughly) 2.3 times as many inbound international students.

5 WHERE MOBILE STUDENTS LIVE DURING TERM

The Department of Education and Training provided de-identified unit data records for the domestic and international on-shore full-time internal-mode higher education students in Australia in the 2004 and 2013 years, which were used to determine how far international students live from campus during term and where, for selected greater metropolitan capital cities, the mobile domestic and international students live during term.

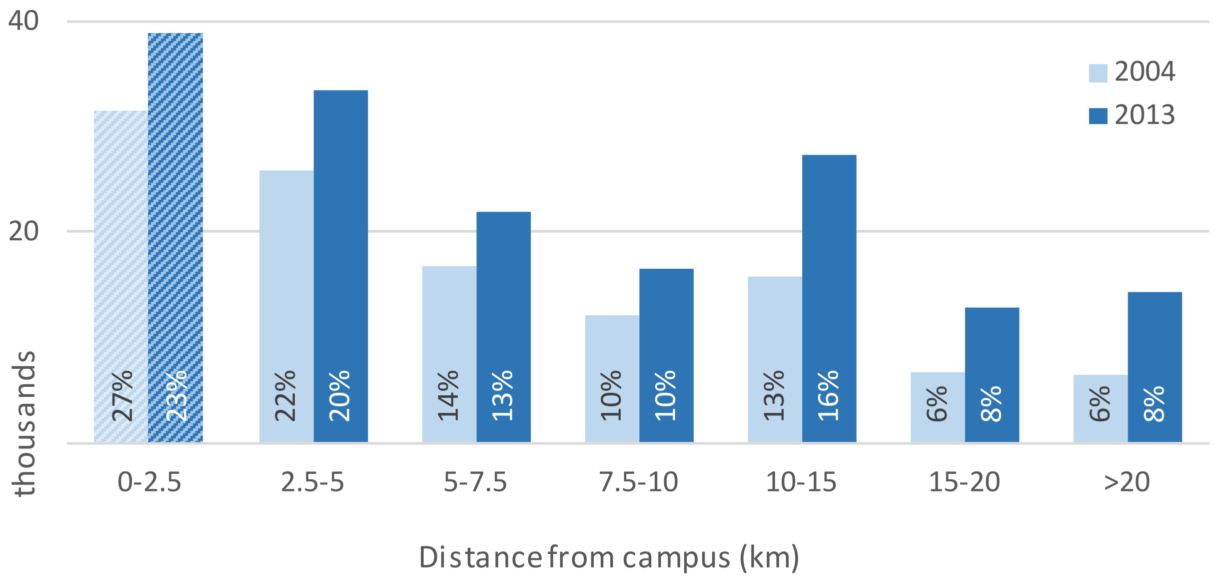
Figure 50 shows, for on-shore full-time internal-mode international students whose term residential postcode is different to their campus postcode, the distribution of distance in kilometres of the term residential postcode from the campus postcode for the 2004 and 2013 years for all of Australia. About 32 per cent of international students in this category were residing in postcodes more than 10 kilometres from their campus postcode during term during the 2013 year.

The 0 – 2.5 km categories in Figure 50 are cross hatched because they do not include the international students whose term residential postcode is reported to be the same as their campus postcode. Material numbers of international students misreport their term residential postcode (data element E319).

The maps in Appendix K show for Sydney, Melbourne and Brisbane only, indicative relative densities (students per square kilometre) of mobile domestic and international students by term residential postcode for the 2013 year. In the case of the maps showing the relative densities of the international students the maps only show relative densities for students whose term residential postcode is different to their campus postcode.

A large number of mobile higher education students in Sydney, Melbourne and Brisbane in particular, have term residential postcodes in areas other than where the major campuses are located.

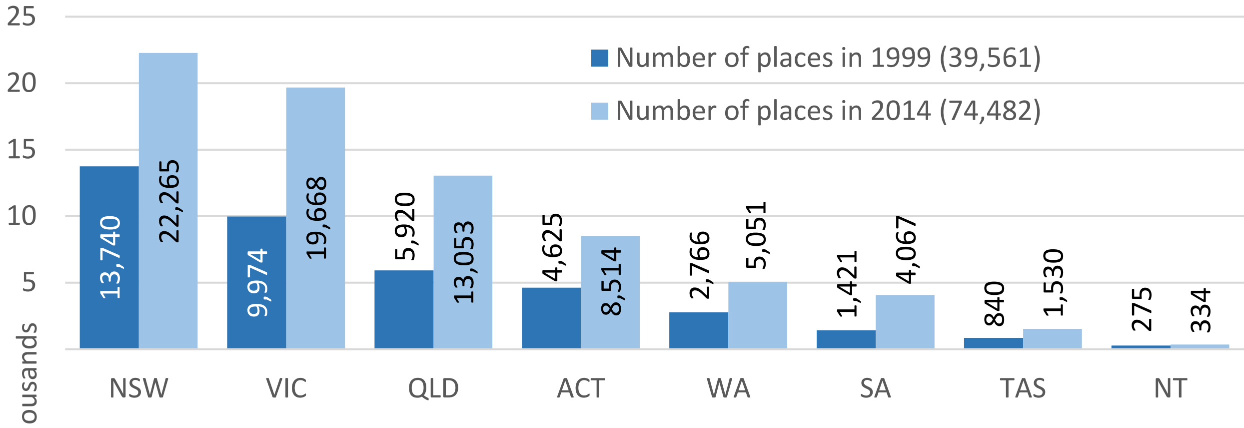
Figure 50: Distance international on-shore internal-mode higher education student term residential postcodes are from campus postcodes for those students whose term residential postcode is different to their campus postcode – all of Australia.



6 DEVELOPMENTS SINCE THE 1999 CENSUS

Changes in location and number of places since 1999

Figure 51: Number of places in 1999 compared to 2014 – by state



The sector increased in size from 39,561 to 74,482 places between 1999 and 2014, an overall increase of 81 per cent which equates to a 4.0 per cent compound annual growth rate over the intervening 15 years.

The growth broken down by state[82] and by greater metropolitan capital city over the past 15 years is shown in Figure 51 and Figure 55 on page 47 respectively.

Up to 20 per cent of the growth in places since 1999 has been via projects funded in part by the Australian Government via grants or incentives from programs such as BURF, CDP, EIF, NRAS and TLC (see Appendix L).

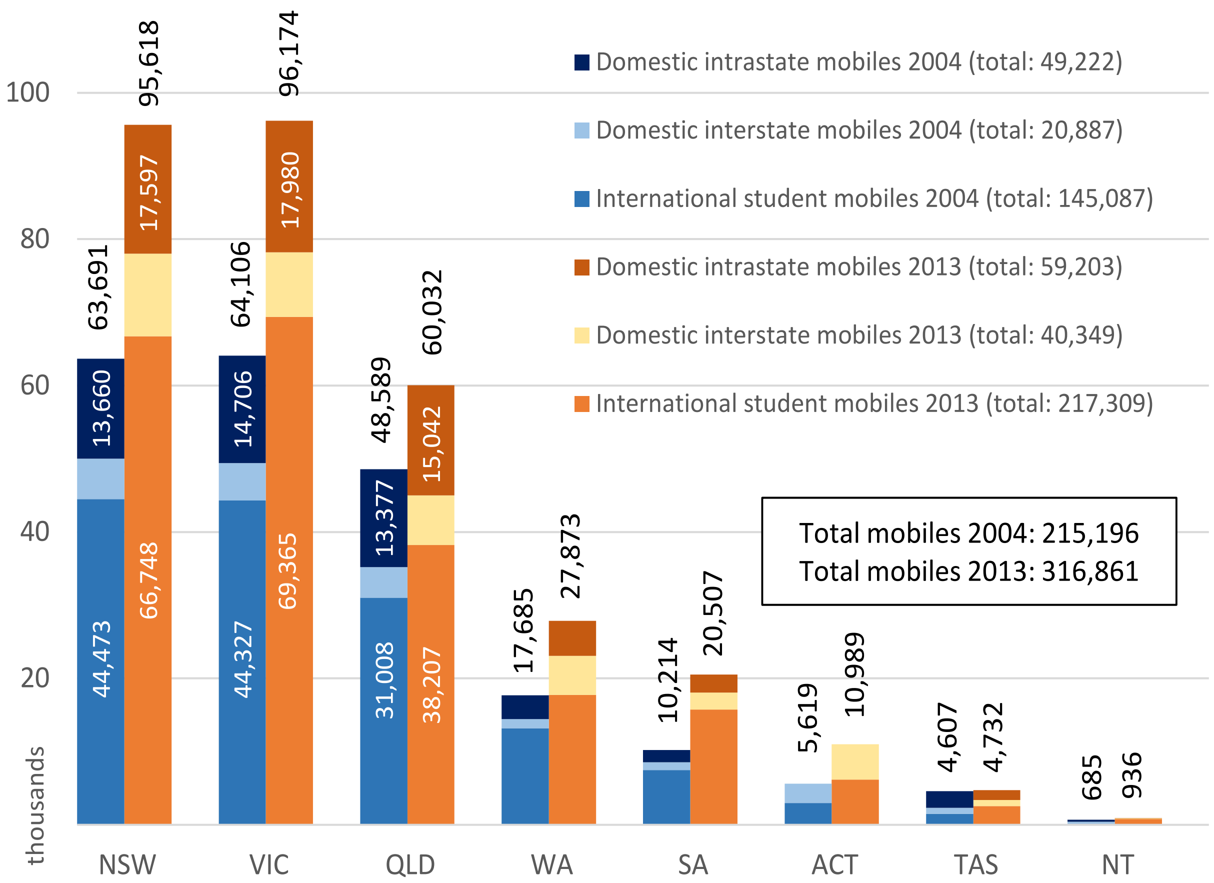
The two largest providers of student accommodation in 1999, New South Wales and Victoria, almost doubled their number of places by 2014. South Australia experienced the greatest growth rate, over the period almost tripling the number of places.

Figure 52 on page 46 shows the growth in mobile higher education students over the period 2004 through to 2013, broken down by state.[83] Mobile higher education students are counted as the sum of domestic full-time internal-mode interstate students plus domestic full-time internal-mode intrastate students who must leave home to attend their chosen university plus onshore full-time internal-mode international students.

There was an increase of 47 per cent in the number of mobile higher education students over the period 2004 through to 2013 which equates to a 4.4 per cent compound annual growth rate over the same period.

82 For Figure 51 the number of places in 1999 includes the commercial student accommodation provider places.
83 Values for Figure 52: Domestic intrastate mobile students 2004 from Appendix G, Table G1: NSW: 13,660; VIC: 14,706; QLD: 13,377; WA: 3,251; SA: 1,685; ACT: 0; TAS: 2,290; NT: 253 (Total 49,222). Domestic interstate student mobiles 2004 from Appendix G, Table G1: NSW: 5,558; VIC: 5,073; QLD: 4,204; WA: 1,248; SA: 1,056; ACT: 2,645; TAS: 830; NT: 273 (Total 20,887). Relevant on-shore international student mobiles 2004 from Appendix G, Table G5: NSW 44,473; VIC 44,327; QLD: 31,008; WA: 13,186; SA: 7,473; ACT: 2,974; TAS 1,487; NT: 159 (Total 145,087). Domestic intrastate mobile students 2013 from Appendix G, Table G2: NSW:17,597; VIC: 17,980; QLD: 15,042; WA: 4,793; SA: 2,422; ACT: 0; TAS: 1,331; NT: 38 (Total 59,203). Domestic interstate student mobiles 2013 from Appendix G, Table G2: NSW: 11,273; VIC: 8,829; QLD: 6,783; WA: 5,352; SA: 2,354; ACT: 4,808; TAS: 832; NT: 118 (Total 40,349). Relevant on-shore international student mobiles 2013 from Appendix G, Table G6: NSW: 66,748; VIC: 69,365; QLD: 38,207; WA: 17,728; SA: 15,731; ACT: 6,181; TAS: 2,569; NT: 780 (Total 217,309).

Figure 52: Number of mobile higher education students in 2004 compared to 2013 – by state



On Campus / Off Campus

The percentage of off campus places has increased from 19 per cent of the sector in 1999 to 33 per cent of the sector in 2014. See Figure 53.

Regional / Metropolitan

The percentage of places in regional locations has decreased from 26 per cent of the sector in 1999 to 19 per cent of the sector in 2014. See Figure 54.

Figure 53: Growth 1999–2014 by on / off campus

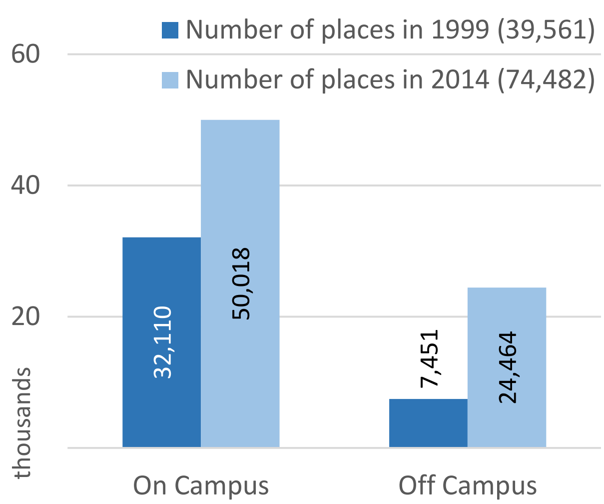


Figure 54: Growth 1999–2014 by regional/ metropolitan

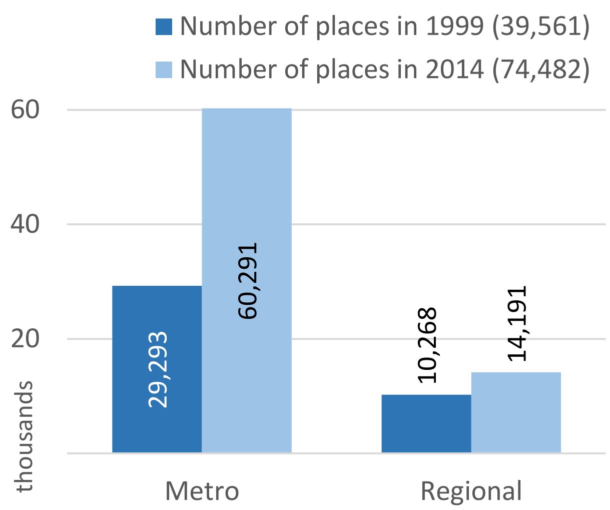


Figure 55: Number of places in 1999 compared to 2014 – by greater metropolitan capital city

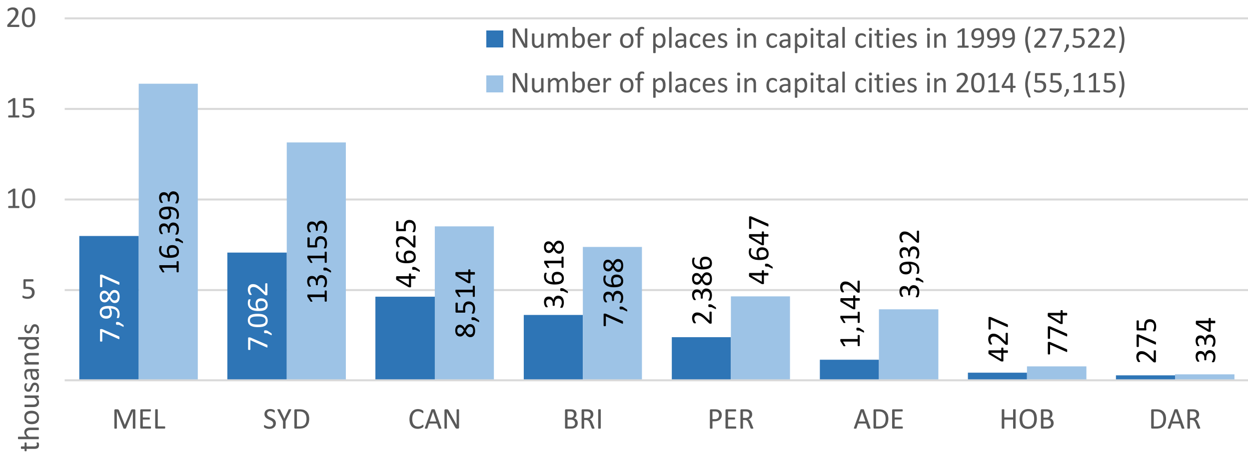
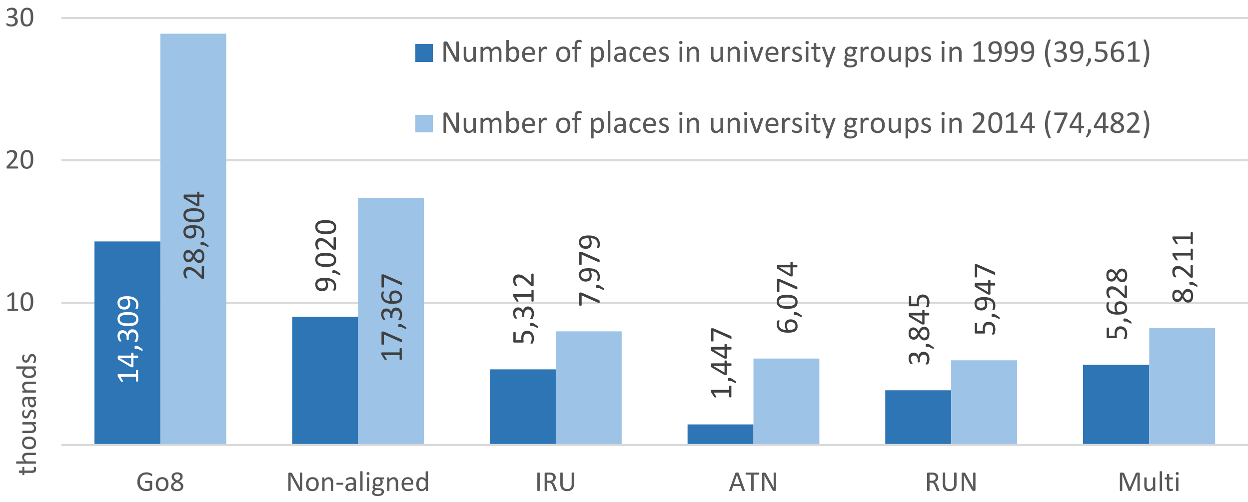


Image: courtesy of Simon Barber on flickr, CC BY-SA 2.0

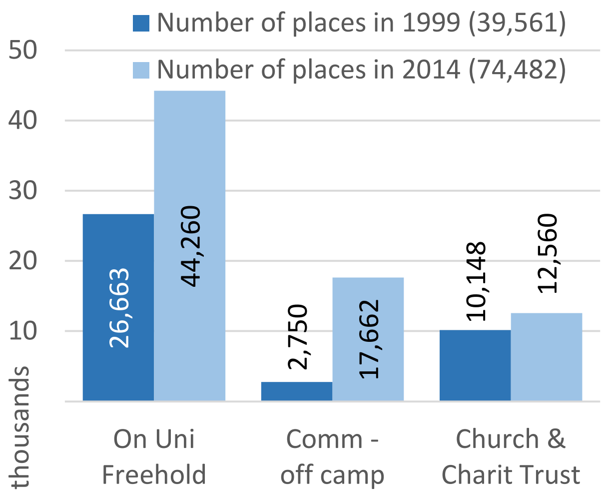
Figure 56: Number of places in 1999 compared to 2014 – by association with a member of one of the university groups



Ownership and management trends

The number of places built on land where a university holds the freehold (land title) increased strongly over the period 1999 to 2014. The same is true (from a small starting base) for places built on off campus land owned by commercial interests, over the same period. See Figure 57.

Figure 57: Number of places in 1999 compared to 2014 – by who holds the freehold (land title)



There has been an increase in the provision of non-university owned student accommodation. This increase is most apparent in the commercially-operated sector, which was almost non-existent in 1999.

The difference between the 2014 and 1999 figures for each type of ownership in Figure 58 on page 49, do not reconcile to new construction over the period.

The reason the difference does not reconcile to new construction in the period is that some church owned or affiliated colleges either closed or were used for a different purpose than that of a residential college (for example, Ridley College at The University of Melbourne). In some other cases the management and control of an affiliated college was assumed by the university with which the college was previously affiliated (for example, Ursula College at the Australian National University).

McDonald (2010) chronicled the merger and closures of smaller affiliated residential colleges in Australia over the period 2000 to 2010.[84]

84 McDonald, P 2010.

Figure 58: Net growth in places by ownership and management type 1999–2014 – nationally

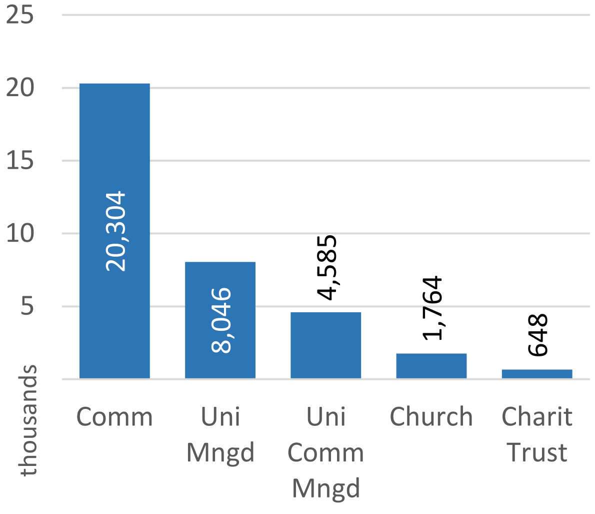
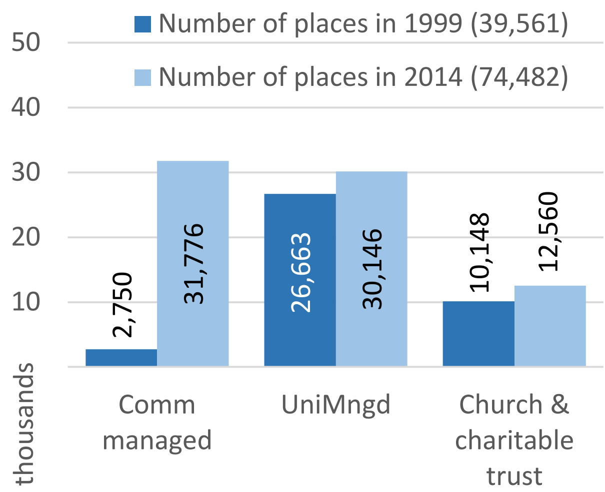


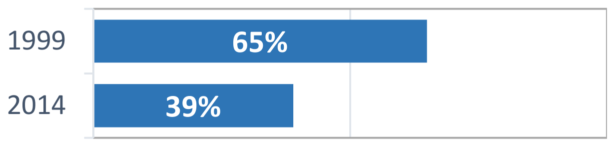
Figure 59: Number of places in 1999 compared to 2014 – by who manages the places



Catering trends

The percentage of places in sites that offer some form of catering has dropped from 65 per cent of the sector in 1999 to 39 per cent of the sector in 2014. See Figure 60.

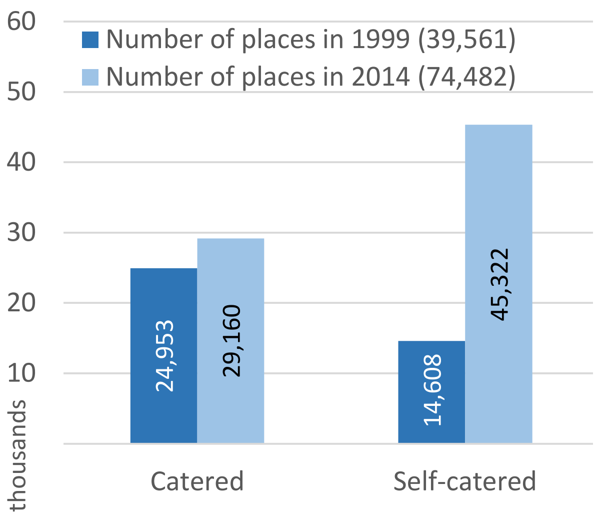
Figure 60: Percentage of places in catered sites 1999 vs 2014



The number of places in sites that offer no catering has increased more than three fold nationally over the past fifteen years, from 14,608 to 45,497 with much of this increase attributable to the commercially operated sites.

The number of places in sites that offer some form of catering by contrast has only increased by 16 per cent over the same period. See Figure 61.

Figure 61: Growth 1999–2014 by catering type



The 1999 UCA Census found that 48 per cent (calculated as 10,406 out of 21,639 places) of all places nationally that were in sites offering some form of catering, has outsourced catering. It also found that 47 per cent (calculated as 47 out of 100 sites) of all sites nationally that offered some form of catering, had outsourced the catering to a contractor.

The 2006 UCA Member's Survey[85] reported that 54 per cent of sites nationally had outsourced the catering to a contractor. The extent of outsourcing in 2006 (as a percentage of sites) was particularly high in New South Wales (above 84 per cent) and South Australia (100 per cent).

Between 1999 and 2006 the percentage of sites nationally that offered some form of catering and that reported they had outsourced the catering to a contractor, increased from 48 to 54 per cent. Between 2006 and 2014 the same figure fell from 54 to 35 per cent.

The decrease in the percentage of catered sites offering some form of catering and that had outsourced the catering to a contractor, over the period 1999 to 2014, should be viewed in the context that over the same period there was an increase in the number of places in sites offering some form of catering.

Changes in accommodation styles and size of sites

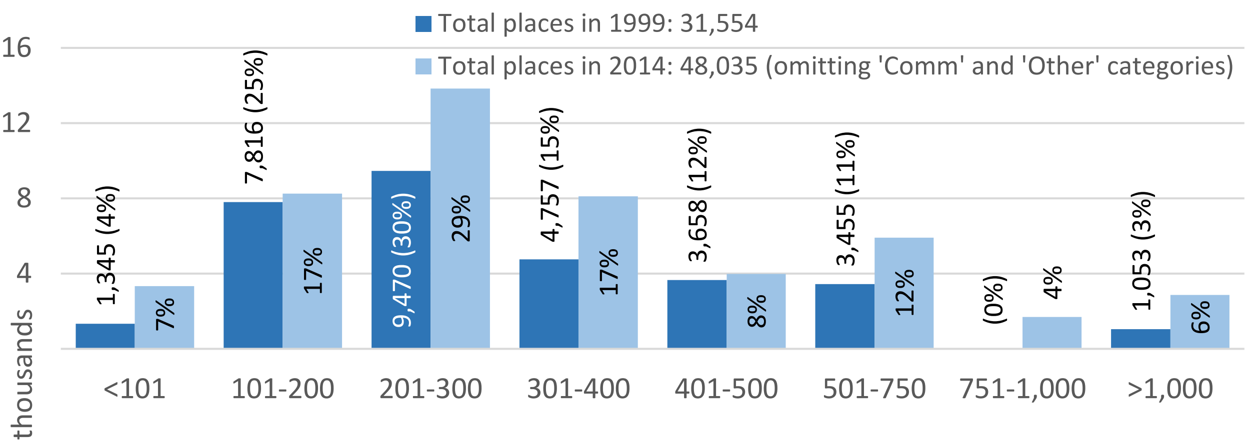
The most common size of site category in 1999 was that for sites with between 201 and 300 places. See Figure 48 on page 42 and Figure 61 on this page.[86]

Figure 62 compares sizes of sites in 1999 to sizes of sites in 2014 after removing the 2014 sites that come under the 'Comm' and 'Other' ownership and management categories. These latter categories are removed from Figure 62 so that sites owned by charitable entities or that are on campus can identify any changes particular to their part of the overall sector.

Figure 48 on page 42 shows the 2014 distribution of places by size of site for all ownership and management types – the size distribution is much the same as that for 2014 in Figure 62 except that once the 'Comm' and 'Other' categories are introduced the number of places in sites each with more than 1,000 places, increases from 6 per cent to 11 per cent.

The number of places in very large sites, being those that have more than 750 places per site, is experiencing strong growth. In 1999 there were a total of 1,053 places nationally in sites with more than 750 places. By 2014 this number had increased from 1,053 to 13,994 (all ownership and management categories).

Figure 62: Number of places broken down by size of site, 1999 compared to 2014



85 In relation to Figure 62 the number of places in 2014 (omitting the 'Comm' and 'Other' categories were: <101: 3,340; 101–200: 8,253; 201–300: 13,842; 301–400: 8,119; 401–500: 3,985; 501–750: 5,922; 751–1000: 1,703; >1,000: 2,871.

86 Universities Australia 2012.

7 ANTICIPATED GROWTH IN THE SECTOR – FORWARD PIPELINE

Current trends in Australian international student data indicate that the 12 per cent growth in students seen in 2014 is likely to continue into at least 2015. It is likely that student numbers in 2015 will exceed the previous peak in 2009, with a greater proportion of students in the higher education sector than was the case in 2009.

This report has investigated accommodation providers' views, as at October 2014, on anticipated growth in purpose built student accommodation places across Australia. Where providers' expansion plans were not well advanced and were considered to be aspirational only, they were not included in the forward pipeline figures in this Chapter.

New South Wales and Victoria, between them, account for 86 per cent of all of the anticipated growth in places nationally over the 2014–2018 period. See Figure 63.

Universities in the Australian Capital Territory are also seeking to expand their student accommodation but given these plans have not generally progressed beyond master plan stage they are not included in the forward pipeline figures in this Chapter.

The recent announcement on 25 February 2015 of discounts by Brisbane City Council for infrastructure and utilities charges of up to $18,000 per unit for new student accommodation construction within 4 km of Brisbane city, will likely stimulate the forward pipeline in Brisbane. These recent developments are not included in the forward pipeline figures in this Chapter.

The Brisbane pipeline, although stated here to be only 1,111 (see Figure 67 on page 53) as at October 2014, could potentially prove to be in exess of 5,000 once announcements made in the first half of 2015 are factored in.

Reported plans for a major expansion (3,700 places) of the amount of purpose built student accommodation on the Gold Coast in Queensland (AFR 27 April 2015 at p 38) are not included in the pipeline figures in this chapter. These particular plans could not be confirmed.

The growth over the 2014–2018 period is not expected to change current rankings of the states in terms of the number of places. New South Wales is expected to remain the state with the largest number of places. See Figure 64 on page 52.

The commercial student accommodation providers account for 48 per cent of the forward pipeline out to 2018, followed closely by the university owned and managed part of the sector which accounts for 40 per cent. See Figure 65 on page 52.

Figure 63: Projected growth in places 2014–2018 – by state

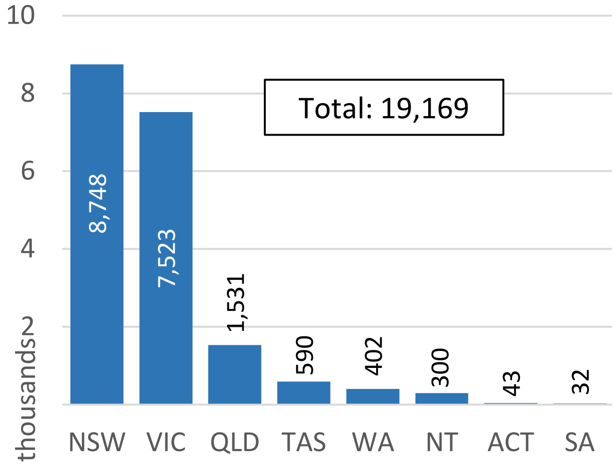


Figure 64: Actual places in 2014 versus projected places in 2018 – by state

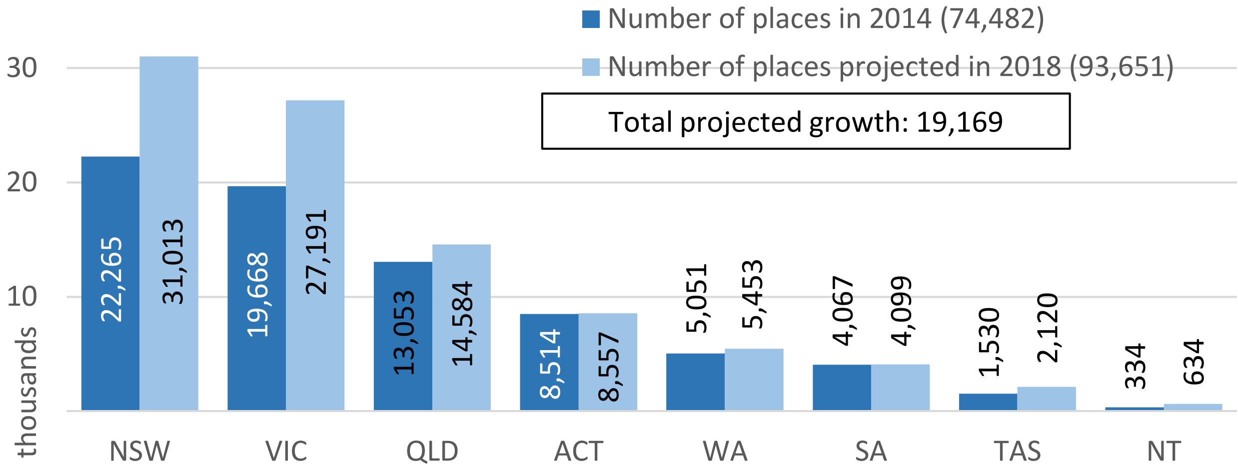
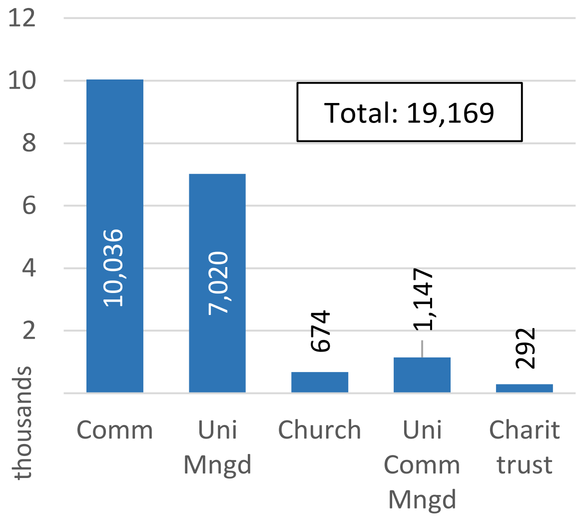


Figure 65: Projected growth in places 2014–2018 by ownership type – nationally



Less than 5 per cent of the places in the forward pipeline out to 2018 are in sites that are in regional locations.

Greater metropolitan Sydney has the largest share of the forward pipeline but Melbourne is expected to remain the greater metropolitan capital city with the largest number of places of all the capital cities, out to 2018. See Figures 66 and 67 on page 53.

The growth in the number of places in sites operated by off campus student accommodation providers is almost entirely confined to greater metropolitan Melbourne and Sydney, out to 2018. See Figure 68 on page 53.

Image: courtesy of Jason James on flickr, CC BY 2.0

Figure 66: Actual places in 2014 versus projected places in 2018 – by greater metropolitan capital city

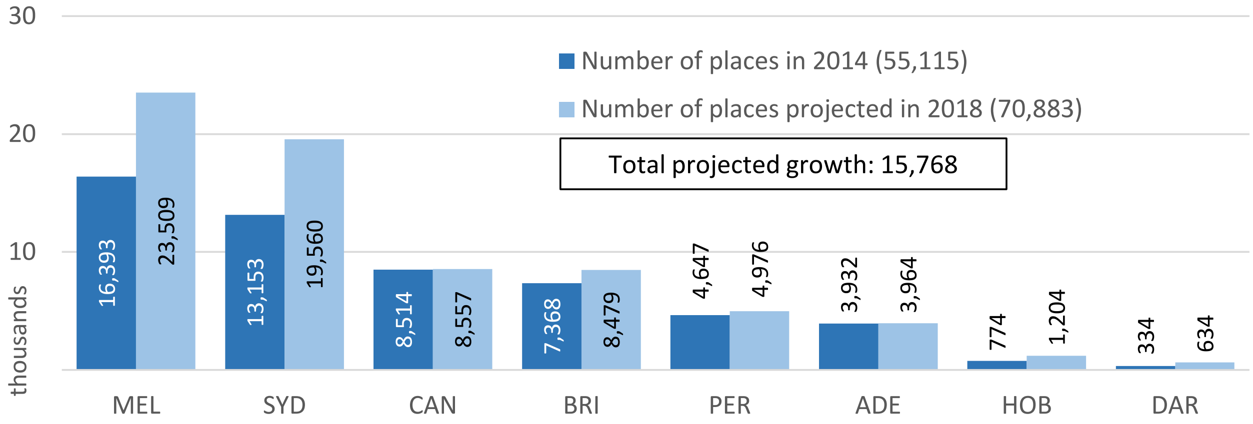


Figure 67: Projected growth in places 2014–2018 – by greater metropolitan capital city

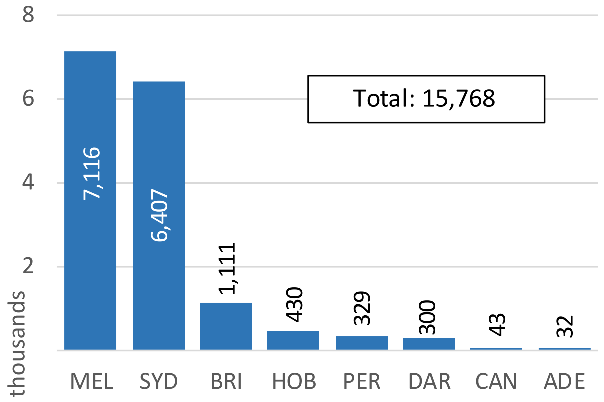


Figure 68: Actual places in 2014 vs projected places in 2018 for off campus commercial student accommodation providers – by greater metropolitan capital city

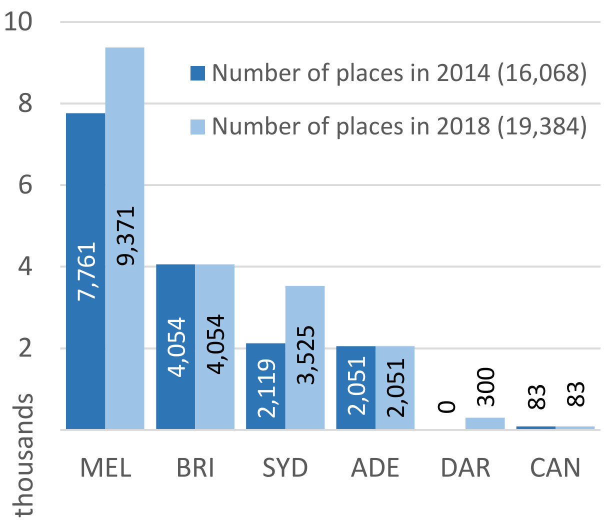
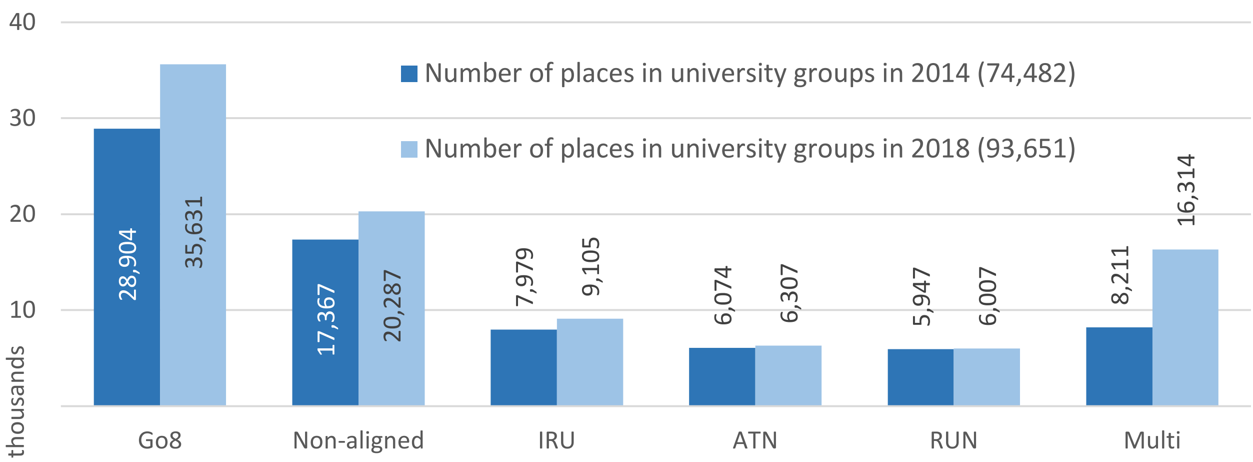


Figure 69: Projected growth in places 2014–2018 – by association with a member of one of the university groups



8 FUTURE RESEARCH OPTIONS

Suggestions for further research are provided under various headings below.

Commercial student accommodation sites with fewer than 100 places

The location and number of places in purpose built commercial student accommodation sites with more than seven but fewer than 100 places in them should be determined. Sites with seven or fewer places are considered part of the private rental market (see below).

There are known to be heavy concentrations of sub-100 place commercial student accommodation sites near certain campuses, including but not limited to:

- UQ, St Lucia campus, Queensland;
- Macquarie, North Ryde campus, New South Wales;
- Monash, Clayton campus, Victoria and;
- Curtin, Bentley campus, Western Australia.

It is believed this part (more than seven but fewer than 100 places per site) of the overall student accommodation sector provides less than 15,000 beds nationally.

Useful research on the sub-100 bed part of the overall student accommodation sector could be undertaken on a desk research basis only.

Student accommodation in the private rental market

For these purposes the private rental market is taken to be separate dwellings (not offered at a student accommodation site comprising multiple student dwellings) with seven or fewer student places per dwelling.

The private rental market in Australia accommodates a much larger number of mobile students than are accommodated in purpose built student accommodation.

It is estimated on a rough basis that the private rental market provides accommodation for more than 215,000 mobile higher education students nationally, the majority of which are international students. Up to 80 per cent of all on-shore internal-mode higher education international students nationally are believed to be accommodated during term in the private rental market.

Rowley (2014), relying upon ABS data, noted that more than 20 per cent of all students nationally are living within the private rental market when studying at university.[87a]

Ike (2015) referred to the pressure placed upon private rental housing, due to the large influx of mobile students [87b]

Useful research on the private rental market part of the overall student accommodation sector could be undertaken via student surveys and/or desk research.

International student ownership of residential properties in Australia

In November 2014 the Australian Parliament House of Representatives Standing Committee on Economics *Report on Foreign Investment in Residential Real Estate* reported on advice from the Reserve Bank of Australia (RBA) to the effect that many of the foreign purchases of apartments in Australia were by the parents of international students.[87c,88,89]

The Universities Australia student finances survey of 2012 found that 9.6 per cent of on-shore international undergraduate university students live during term in a residence which either they or their parents own.[90] This result would suggest there could be up to 20,000 beds in Australia (say, up to somewhere in the range of 10,000 to 15,000 dwellings) owned by current on-shore international

87a Rowley, S et al 2014. pp 2,5,6 & 7.
87b Ike, N 2015. p2.
87c Australian Parliament House of Representatives Standing Committee on Economics 2014. para 3.113 at p72.
88 Reserve Bank of Australia 2014, *Submission to Standing Committee on Economics.* pp2 & 6 and footnote 6.
89 Reserve Bank of Australia 2014, *Foreign Investment in Residential Real Estate.* Footnote 5 on p16.
90 Bexley, E *et al* 2013. p109.

higher education students or their families.

It would be useful to have further research on the location and types of residential properties owned in Australia by current and former international students or their families and on the extent to which these properties are part of the existing stock of PBSA sites already counted in this survey.

Pricing/affordability of student accommodation

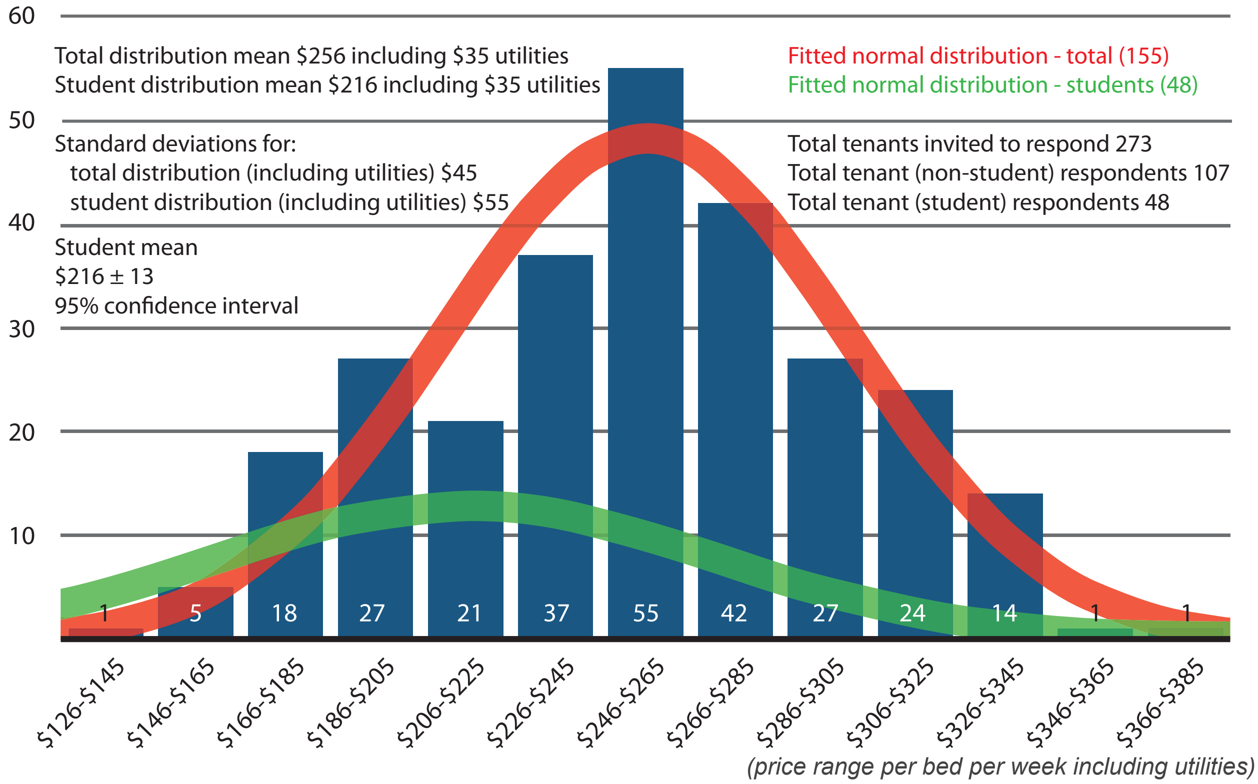
Research at the national level is needed on how much mobile students are presently paying for their accommodation during term and on the affordability of the accommodation on offer.

The Universities Australia Student Finances surveys[91,92] are already looking at the question of how much students are paying for accommodation. However more research is needed on how much student demand there is at the different price points.

Figure 70 shows research undertaken by Tertiary Balance in 2012 for a university college client, based upon a survey of all “new rental bonds” in the suburbs surrounding the (capital city) campus in 2012, that identified there is student appetite for accommodation across a wide range of price points.

In the case of the above-mentioned 2012 survey, the utilities-exclusive mean student rent paid per bed was 82 per cent of the utilities-exclusive mean rent paid by all renters (student and otherwise) in the suburbs surrounding the (capital city) campus in question. Analysis of this sort would be useful across all major capital cities.

Figure 70: Number of private rental “new bond” beds advertised in suburbs surrounding “X” campus of university “Y” in capital city “Z” by $20 price bracket for January 2012

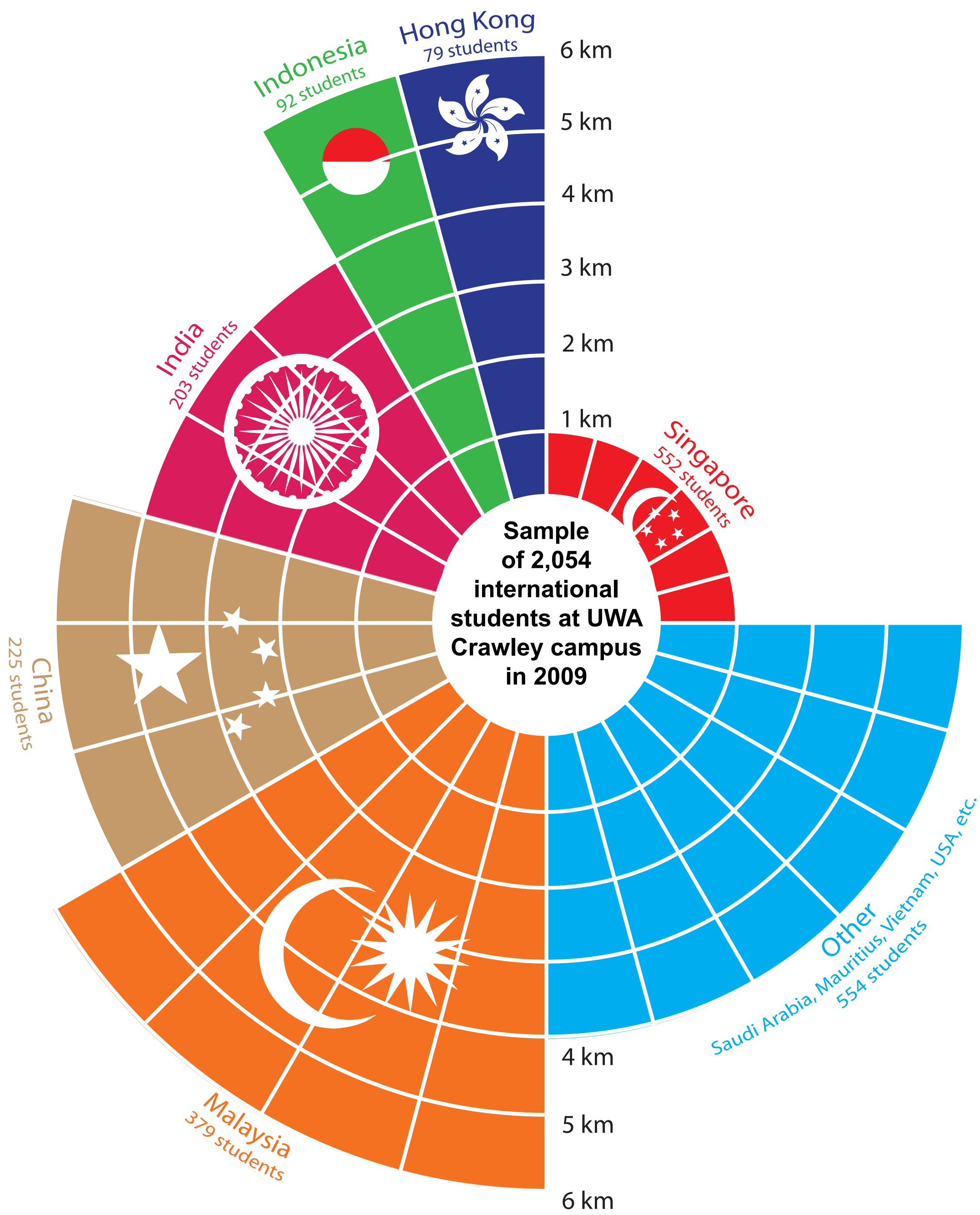


91 James, R *et al* 2007.
92 Bexley, E *et al* 2013.

More on where mobile students live during term

More research at the national level is needed on where mobile students live during term. Answers to questions such as: *how far from their campus are international students living during term – broken down by nationality and further broken down by gender?* would be useful to know for planning and other purposes. See Figure 71 for an analysis on this question that was undertaken by Tertiary Balance for a residential college client at The University of Western Australia (UWA) in 2009. Findings from that analysis indicated there can be material differences by nationality and by gender in terms of how far from campus international students live during term.

Figure 71: Median distance of term address from Crawley campus for a sample of 2,054 international students at UWA in 2009 year – by nationality of student



Tertiary Balance Pty Ltd

9 CONCLUSIONS

This report has investigated the amount of purpose built or operated collegiate and other (100+ bed) student accommodation for university students within Australia. It has also looked at the styles of accommodation and some of the demographics of the students in residence. It adds to the limited body of research on the sector in Australia to date.

The purpose built or operated student accommodation sector in Australia is not only much smaller than the equivalent sectors in the UK and USA (Australia's two largest competitors for inbound international students) but is also less well researched and documented.

More research and analysis is needed on the Australian student accommodation sector to support the growing population of mobile students, whether they be domestics or inbound internationals. The well developed student accommodation sectors in the UK and USA destinations provide a useful benchmark, in terms of the quality and quantity of on-going research and analysis that could be undertaken on the sector in Australia by various stakeholders.

Recent indications of the extent of commercial research and analysis in the UK sector are provided by the reports from Siebrits (CBRE)[93], Winchester (CBRE)[94], Pullan (Knight Frank)[95] and Hudson (Savilles)[96].

To put Australia's international competitive position on student accommodation into context it is worth noting that the UK has 2.3 times as many inbound tertiary international students as Australia, but has more than 6.5 times as many PBSA places (of which 65 per cent are on campus) as Australia.

The USA has three times as many inbound tertiary international students as Australia, but has roughly 38 times as many PBSA places (of which 76 per cent are on campus) as Australia. Admittedly the enormous number of PBSA places in the USA exist primarily to service the large numbers of mobile domestic students in the USA – where a large percentage of students leave home to go to college.[97]

The USA's ability to provide suitable on campus accommodation to meet the specialised needs of inbound postgraduate international students in particular, vastly exceeds that of Australia.

In 2013 there were about 317,000 mobile domestic and international higher education students in Australia up from about 215,000 in 2004 and projected to be about 375,000 in 2015.

This report estimates the Australian PBSA count will increase in size by roughly 25,000 places between now and 2020, assuming continuance of current policy and market settings.

On current indications, the percentage of PBSA places to mobile university students in Australia which is presently at roughly 20 per cent will not increase between now and 2020 and indeed may decrease.

Reducing the gap between Australia and the major competitor destinations on relative numbers of PBSA places (to mobile students) is but one aspect of the competitive picture. There is more to this than just increasing the bed count.

Research by Coates (2009)[98] in an Australian study found that students living on campus in a collegiate environment have higher levels of engagement than students living off campus (these findings related to the international student cohort as well).

Subsequent research by Coates (2010)[99] using Australasian Survey of Student Engagement (AUSSE) and USA National Survey of Student Engagement (NSSE) data found that international students in Australian universities have lower levels of engagement with their institution when compared to international students in USA universities.

93 Siebrits, J 2013.
94 Winchester, J *et al* 2013.
95 Pullan, J *et al* 2014.
96 Hudson, N *et al* 2013.
97 Snyder, T *et al* 2013 indicating that 25 per cent of all first time degree seeking undergraduates in the USA who graduated from high school in the previous 12 months moved out of the state in fall 2010. See Table 260 at p360 and calculated as 364,122 * 100 / 1,449,329.
98 Coates, H *et al* 2009.
99 Coates, H *et al* 2010.

The above mentioned research by Coates as well as earlier work by Pascarella & Terenzini (1991), Blimling (1993) and Markwell (2007), in a collegiate context, has drawn attention to the importance of social infrastructure and pastoral and academic support in a residential setting.

To remain competitive with the best international study destinations globally, the Australian purpose built and operated student accommodation will need to maintain and improve its focus on assisting with or enhancing the broader student experience inclusive of areas such as engagement with the host university, social infrastructure, pastoral and academic support and other value added services.

The Australian Education International (AEI) report on international student satisfaction with accommodation[100] reported that whilst a high proportion of students were satisfied with the access to and the quality of their accommodation, a much lower proportion were satisfied with the cost of their accommodation. This was partly a result of the relatively high exchange rate of the Australian dollar against local currencies of students when compared to the equivalent exchange rates of (for example) the UK pound and US dollar.

Nonetheless, it can be assumed that there may be potential interest for lower cost PBSA places – both from inbound internationals as well as from mobile domestics.

This is not to say the demand for accommodation does not exist across a wide range of price points for the population of higher education and other students who have no option but to seek accommodation in the private rental market, often situating them at considerable distance from their place of study and reducing their level of engagement with on campus learning and other activities. The more diversity the sector can offer going forward, both in terms of price and style, the better.

100 Lawson, C 2013.

APPENDICES

APPENDIX A: CAMPUSES WITHIN SCOPE AND REGIONAL/METROPOLITAN CLASSIFICATIONS

Classification system

Regional/Metropolitan definitions are based on the Australian Statistical Geography Standard (ASGS) Remoteness Structure 2011 categories using the ABS postcode (2012) to Remoteness Area (2011) correspondence spreadsheets available online.

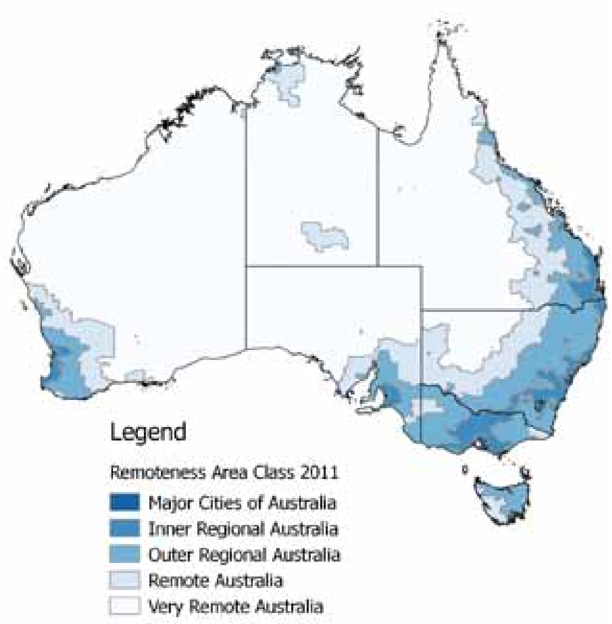
The ASGS Remoteness Structure is a categorical, geographic measure of remoteness designed for use as a tool to aid in policy making decisions in Australia. The structure divides Australia into five remoteness categories from major cities to very remote Australia based on accessibility (see map below).

The ASGS Remoteness Structure is based on the extended version of the Accessibility/Remoteness Index of Australia (ARIA+) remoteness index developed by the National Key Centre for Social Application of GIS (GISCA) as a joint project with the Australian Department of Health and Ageing in 1997/98. ARIA+ is published as a one kilometre grid or matrix that covers the whole of Australia. Under the index, remoteness is determined based on road distance measurements to the nearest government service centre.

Campus Classification

Campuses have been classified based on their postcode. Where a campus postcode falls more than 50% within the 'Major Cities of Australia' category under the ASGS Remoteness Area Structure, it is classified as Metropolitan. If it falls in any of the other regional or remote categories it is classified as regional (see Table A1 below). The Department of Education and Training has approved the regional/metropolitan classifications for each of these campuses, for the purposes of the Census.

Figure A1: Map of Remoteness Area Classifications



Appendix A: Campuses within scope and regional/metropolitan classifications

The universities and campuses listed below are those that are within scope for the purposes of the Census.

Table A1: Campuses within scope and regional/metropolitan classification

University	Campus (postcode)	Major Capital City	EFTSL*	ASGS Classification
Australian Catholic University	Melbourne (3065)	Melbourne	5,430	Metropolitan
	Strathfield (2135)	Sydney	3,905	Metropolitan
	Brisbane (4014)	Brisbane	3,453	Metropolitan
	North Sydney (2060)	Sydney	2,783	Metropolitan
	Ballarat (3350)	Rest of VIC.	829	Regional
	Canberra (2602)	Canberra	605	Metropolitan
Bond University	Gold Coast (4226)	Rest of QLD	5,991	Metropolitan
Central Queensland University	Sydney (2000)	Sydney	1,919	Metropolitan
	Rockhampton (4702)	Rest of QLD	1,146	Regional
	Melbourne (3000)	Melbourne	1,111	Metropolitan
	Brisbane (4000)	Brisbane	805	Metropolitan
	Mackay (4741)	Rest of QLD	462	Regional
	Bundaberg (4670)	Rest of QLD	404	Regional
	Southport (4215)	Brisbane	282	Metropolitan
	Pomona (4568)	Rest of QLD	230	Regional
	Gladstone (4680)	Rest of QLD	124	Regional
Charles Darwin University	Casuarina (0810)	Darwin	1,674	Regional
Charles Sturt University	Wagga Wagga (2678)	Rest of NSW	2,853	Regional
	Bathurst (2795)	Rest of NSW	2,375	Regional
	Albury (2640)	Rest of NSW	1,398	Regional
	Goulburn (2580)	Rest of NSW	1,153	Regional
	Darlinghurst (2010)	Sydney	757	Metropolitan
	Orange (2800)	Rest of NSW	488	Regional
	Melbourne (3000)	Melbourne	428	Metropolitan
	Dubbo (2830)	Rest of NSW	217	Regional

University	Campus (postcode)	Major Capital City	EFTSL*	ASGS Classification
Charles Sturt University	Holmesglen (3148)	Melbourne	102	Metropolitan
	Canberra (2600)	Canberra	92	Metropolitan
	Crows Nest (2065)	Sydney	79	Metropolitan
	Parramatta (2151)	Sydney	68	Metropolitan
Curtin University of Technology	Bentley Campus (6102)	Perth	22,273	Metropolitan
	Chippendale (2008)	Sydney	567	Metropolitan
	Perth City Campus (6000)	Perth	303	Metropolitan
	Kalgoorlie Campus (6430)	Rest of WA	292	Regional
Deakin University	Burwood (3125)	Melbourne	16,440	Metropolitan
	Highton (3216)	Melbourne	4,521	Metropolitan
	Waterfront (3220)	Melbourne	1,833	Metropolitan
	Warrnambool (3280)	Rest of VIC	887	Regional
Edith Cowan University	Joondalup (6027)	Perth	8,139	Metropolitan
	Mt Lawley (6050)	Perth	4,906	Metropolitan
	Bunbury (6230)	Rest of WA	646	Regional
Federation University Australia	Ballarat (3350)	Rest of VIC	5,060	Regional
	Melbourne (3000)	Melbourne	1,754	Metropolitan
	Sydney (2000)	Sydney	1,185	Metropolitan
	Adelaide (5000)	Adelaide	165	Metropolitan
	Melbourne (3002)	Melbourne	101	Metropolitan
	Geelong (3220)	Melbourne	89	Metropolitan
	Horsham (3400)	Rest of VIC	67	Regional
Flinders University of South Australia	Bedford Park (5042)	Adelaide	12,071	Metropolitan
	Adelaide at City Centre (5000)	Adelaide	362	Metropolitan
	Noarlunga (5168)	Adelaide	92	Metropolitan
Griffith University	Gold Coast (4222)	Rest of QLD	12,659	Metropolitan
	Nathan (4111)	Brisbane	9,933	Metropolitan
	Mt. Gravatt (4122)	Brisbane	2,834	Metropolitan

Appendix A: Campuses within scope and regional/metropolitan classifications

University	Campus (postcode)	Major Capital City	EFTSL*	ASGS Classification
Griffith University	Brisbane (4101)	Brisbane	2,389	Metropolitan
	Logan (4131)	Brisbane	1,525	Metropolitan
James Cook University	Townsville (4810)	Rest of QLD	7,710	Regional
	Cairns (4878)	Rest of QLD	2,485	Regional
	Brisbane (4000)	Brisbane	795	Metropolitan
La Trobe University	Bundoora (3086)	Melbourne	18,021	Metropolitan
	Bendigo (3550)	Rest of VIC	4,012	Regional
	Albury-Wodonga (3690)	Rest of NSW	653	Regional
	Sydney (2000)	Sydney	653	Metropolitan
	Shepparton (3630)	Rest of VIC	385	Regional
	Mildura (3500)	Rest of VIC	367	Regional
	City (3000)	Melbourne	128	Metropolitan
Macquarie University	Macquarie University (2109)	Sydney	24,873	Metropolitan
	Sydney (2000)	Sydney	1,100	Metropolitan
Monash University	Clayton (3800)	Melbourne	20,556	Metropolitan
	Caulfield East (3145)	Melbourne	10,020	Metropolitan
	Peninsula (3199)	Melbourne	2,805	Metropolitan
	Gippsland (3842)	Rest of VIC	1,667	Regional
	Berwick (3806)	Melbourne	1,474	Metropolitan
	Parkville (3052)	Melbourne	1,125	Metropolitan
	Melbourne (3000)	Melbourne	551	Metropolitan
	Prahran (3181)	Melbourne	235	Metropolitan
Murdoch University	Murdoch (6150)	Perth	8,505	Metropolitan
	Mandurah (6210)	Perth	346	Metropolitan
	Rockingham (6168)	Perth	179	Metropolitan
Queensland University of Technology	Brisbane (4000)	Brisbane	19,226	Metropolitan
	Kelvin Grove (4059)	Brisbane	10,885	Metropolitan
	Caboolture (4510)	Brisbane	531	Metropolitan

University	Campus (postcode)	Major Capital City	EFTSL*	ASGS Classification
RMIT University	City Campus (3000)	Melbourne	22,703	Metropolitan
	Bundoora Campus (3083)	Melbourne	5,035	Metropolitan
	Brunswick Campus (3056)	Melbourne	805	Metropolitan
Southern Cross University	Lismore (2480)	Rest of NSW	2,313	Regional
	Coffs Harbour (2457)	Rest of NSW	964	Regional
	Tweed Heads (2485)	Rest of QLD	943	Metropolitan
	Gold Coast (4225)	Rest of QLD	447	Metropolitan
	Sydney (2000)	Sydney	349	Metropolitan
Swinburne University of Technology	Hawthorn (3122)	Melbourne	11,209	Metropolitan
	Prahran (3181)	Melbourne	2,077	Metropolitan
	Lilydale (3140)	Melbourne	1,411	Metropolitan
	Wantirna (3152)	Melbourne	472	Metropolitan
The Australian National University	Acton (2000)	Canberra	14,219	Metropolitan
The University of Adelaide	Adelaide (5005)	Adelaide	18,914	Metropolitan
	Roseworthy (5371)	Rest of SA	326	Regional
	Urrbrae (5064)	Adelaide	279	Metropolitan
The University of Melbourne	Parkville (3010)	Melbourne	36,343	Metropolitan
	Southbank (3006)	Melbourne	1,063	Metropolitan
	Werribee (3030)	Melbourne	238	Metropolitan
	Richmond (3121)	Melbourne	192	Metropolitan
The University of Notre Dame	Broadway (2007)	Sydney	3,797	Metropolitan
	Broome (6725)	Rest of WA	75	Regional
	Fremantle (6959)	Perth	4,235	Metropolitan
The University of Queensland	St Lucia (4072)	Brisbane	31,482	Metropolitan
	Herston (4006)	Brisbane	2,139	Metropolitan
	Gatton (4345)	Rest of QLD	1,348	Regional
	Ipswich (4305)	Brisbane	1,133	Metropolitan
The University of Sydney	Camperdown (2006)	Sydney	33,607	Metropolitan

Appendix A: Campuses within scope and regional/metropolitan classifications

University	Campus (postcode)	Major Capital City	EFTSL*	ASGS Classification
The University of Sydney	Lidcombe (2141)	Sydney	2,625	Metropolitan
	Sydney (2000)	Sydney	783	Metropolitan
	Rozelle (2039)	Sydney	690	Metropolitan
	Camperdown (2050)	Sydney	499	Metropolitan
	Westmead (2145)	Sydney	299	Metropolitan
	Surry Hills (2010)	Sydney	132	Metropolitan
	Camden (2570)	Sydney	117	Metropolitan
	Newtown (2042)	Sydney	93	Metropolitan
The University of Western Australia	Crawley (6009)	Perth	19,438	Metropolitan
University of Canberra	Bruce (2617)	Canberra	7,770	Metropolitan
University of New England	Armidale (2351)	Rest of NSW	3,066	Regional
	Sydney City (2000)	Sydney	114	Metropolitan
University of New South Wales	Kensington (2052)	Sydney	32,507	Metropolitan
	Paddington (2021)	Sydney	2,141	Metropolitan
	Braddon (2612)	Sydney	1,708	Metropolitan
	Sydney CBD (2000)	Sydney	272	Metropolitan
University of Newcastle	Callaghan (2308)	Rest of NSW	16,175	Metropolitan
	Ourimbah (2258)	Rest of NSW	3,175	Metropolitan
	Newcastle (2300)	Rest of NSW	672	Metropolitan
	Sydney (2000)	Sydney	411	Metropolitan
	Port Macquarie (2444)	Rest of NSW	286	Regional
University of South Australia	Adelaide (5000)	Adelaide	10,822	Metropolitan
	Magill (5072)	Adelaide	3,537	Metropolitan
	Mawson Lakes (5095)	Adelaide	3,260	Metropolitan
	Whyalla Norrie (5608)	Rest of SA	152	Regional
	Mt Gambier (5290)	Rest of SA	131	Regional
University of Southern Queensland	Toowoomba (4350)	Rest of QLD	2,932	Regional
	Springfield (4300)	Brisbane	1,043	Metropolitan

University	Campus (postcode)	Major Capital City	EFTSL*	ASGS Classification
University of Southern Queensland	Fraser Coast (4655)	Rest of QLD	466	Regional
University of Tasmania	Hobart (7005)	Hobart	7,974	Regional
	Launceston (7250)	Hobart	4,021	Regional
	Burnie (7320)	Hobart	384	Regional
	Rozelle (2039)	Sydney	342	Metropolitan
	Sydney (2010)	Sydney	166	Metropolitan
University of Technology, Sydney	Broadway (2007)	Sydney	21,752	Metropolitan
	Lindfield (2070)	Sydney	2,673	Metropolitan
	Sydney City (2000)	Sydney	426	Metropolitan
University of the Sunshine Coast	Sippy Downs (4556)	Brisbane	6,520	Metropolitan
University of Western Sydney	Parramatta (2116)	Sydney	8,922	Metropolitan
	Penrith (2747)	Sydney	7,151	Metropolitan
	Bankstown Campus (2200)	Sydney	5,457	Metropolitan
	Campbell Town (2560)	Sydney	4,947	Metropolitan
	Hawkesbury (2753)	Sydney	1,682	Metropolitan
	Nirimba (2763)	Sydney	988	Metropolitan
University of Western Sydney	Westmead Precinct (2145)	Sydney	176	Metropolitan
University of Wollongong	Wollongong (2500)	Rest of NSW	15,981	Metropolitan
	Shoalhaven (2535)	Rest of NSW	512	Regional
	Loftus (2232)	Sydney	373	Metropolitan
	Sydney (2000)	Sydney	323	Metropolitan
	Innovation Campus (2519)	Sydney	284	Metropolitan
	Batemans Bay (2536)	Rest of NSW	103	Regional
	Bega (2550)	Rest of NSW	103	Regional
	Moss Vale (2577)	Rest of NSW	70	Regional
Victoria University	Footscray Nicholson (3011)	Melbourne	8,943	Metropolitan
	St Albans (3021)	Melbourne	3,719	Metropolitan
	City King (3000)	Melbourne	2,767	Metropolitan

Appendix A: Campuses within scope and regional/metropolitan classifications

University	Campus (postcode)	Major Capital City	EFTSL*	ASGS Classification
Victoria University	Sydney-ECA (2000)	Melbourne	530	Metropolitan
	Werribee (3030)	Melbourne	144	Metropolitan
TOTALS	167 Campuses		712,410 EFTSL	

* EFTSL counts for all internal-mode university students for the 2012 year broken down by Australian campus are sourced from the Department of Education and Training and were provided on 17 June 2014 under data request RFI14-239 (data prepared by Zhengfeng Li).

These EFTSL counts do not include any students whose mode of attendence is external or multi-mode.

APPENDIX B: LIST OF AFFILIATED RESIDENTIAL COLLEGES AND HALLS IN AUSTRALIA

All of the colleges and halls listed in this Appendix have either a statutory or other formal affiliation with their host university.

Australian National University

John XXIII College[101]
Burgmann College[102]

Charles Sturt University

St Francis College[103]
St Martin's College[104]

James Cook University

John Flynn College[105]
Saints College[106]
St Mark's College[107]

Macquarie University

Dunmore Lang College[108]
Robert Menzies College[109]

Monash University

Mannix College[110]

The University of Adelaide

Aquinas College[111]
Kathleen Lumley College[112]
Lincoln College[113]
St Ann's College[114]
St Mark's College[115]

The University of Melbourne

Graduate House[116]
International House[117]
Janet Clark Hall[118]
Newman College[119]
Ormond College[120]
Queen's College[121]
St Hilda's College[122]
St Mary's College[123]
Trinity College[124]
University College[125]
Whitley College[126]

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101 <http://johnxxiii.anu.edu.au>.
102 <http://burgmann.anu.edu.au>.
103 <http://www.stfranciscollege.org.au>.
104 <http://www.stmartinscollege.org>.
105 <http://www.johnflynn.org>.
106 <http://www.cathcollegesjcu.edu.au>.
107 <http://stmarks.jcu.edu.au>.
108 <http://www.dunmorelangcollege.nsw.edu.au>.
109 <http://www.rmc.org.au/home>.
110 <http://www.mannix.monash.edu>.
111 <http://www.aquinas.edu.au>.
112 <http://www.kathleenlumleycollege.com.au>.
113 <http://www.lincoln.edu.au>.
114 <http://www.stannscollege.edu.au>.
115 <http://www.stmarkscollege.com.au>.
116 <https://www.graduatehouse.com.au>.
117 <http://www.ihouse.unimelb.edu.au>.
118 <http://www.jch.unimelb.edu.au>.
119 <http://www.colleges.unimelb.edu.au/colleges/college-newman.html>.
120 <http://www.colleges.unimelb.edu.au/colleges/college-ormond.html>.
121 <http://www.colleges.unimelb.edu.au/colleges/college-queens.html>.
122 <http://www.colleges.unimelb.edu.au/colleges/college-sthildas.html>.
123 <http://www.stmarys.unimelb.edu.au>.
124 <http://www.trinity.unimelb.edu.au>.
125 <http://www.unicol.unimelb.edu.au>.
126 <http://whitley.unimelb.edu.au>.

Appendix B: List of affiliated residential colleges and halls in Australia

The University of New England

St Albert's College[127]

The University of New South Wales

Creston College[128]
International House[129]
New College[130]
Shalom College[131]
Warrane College[132]

The University of Queensland

Cromwell College[133]
Duchesne College[134]
Emmanuel College[135]
Grace College[136]
International House[137]
King's College[138]
St John's College[139]
St Leo's College[140]
The Women's College[141]
Union College[142]

The University of Sydney

Mandelbaum College[143]
Sancta Sophia College[144]
St Andrew's College[145]
St John's College[146]
St Paul's College[147]
The Women's College[148]
Wesley College[149]

The University of Western Australia

St Catherine's College[150]
St George's College[151]
St Thomas More College[152]
Trinity College[153]

University of Tasmania

Jane Franklin Hall[154]

127 <http://www.stalbertscollege.catholic.edu.au>.
128 <http://crestoncollege.edu.au>.
129 <https://ihunsw.edu.au>.
130 <http://www.newcollege.unsw.edu.au>.
131 <http://www.shalomcollege.unsw.edu.au>.
132 <http://www.warrane.unsw.edu.au>.
133 <http://www.cromwell.uq.edu.au>.
134 <http://www.uq.edu.au/duchesne>.
135 <http://www.emmanuel.uq.edu.au>.
136 <http://www.grace.uq.edu.au>.
137 <http://www.internationalhouse.uq.edu.au>.
138 <http://www.kings.uq.edu.au>.
139 <http://www.stjohns.uq.edu.au>.
140 <http://www.stleos.uq.edu.au>.
141 <http://www.womens.uq.edu.au>.
142 <http://www.union.uq.edu.au>.
143 <http://www.mandelbaum.usyd.edu.au>.
144 <http://www.sanctasophiacollege.edu.au>.
145 <http://www.standrewscollege.edu.au>.
146 <http://www.stjohnscollege.edu.au>.
147 <http://www.stpauls.edu.au/home>.
148 <http://www.thewomenscollege.com.au>.
149 <http://www.wesleycollege-usyd.edu.au>.
150 <http://www.stcatherines.uwa.edu.au>.
151 <http://www.stgeorgescollege.com.au>.
152 <http://www.stmc.uwa.edu.au>.
153 <http://www.trinity.uwa.edu.au>.
154 <http://www.jane.edu.au>.

APPENDIX C: SURVEY PRE-ANNOUNCEMENT LETTER

Pre-announcement letter

National Census of colleges, halls and 100+ bed commercial student accommodation providers

Student accommodation providers are asked to participate in the coming *National Census of Colleges, Halls and 100+ bed Commercial Student Accommodation Providers* **(Census)**.

The Census is an initiative of University Colleges Australia **(UCA)** and is being undertaken with assistance from both the Australian Government and the Australasian Association of College and University Housing Officers **(AACUHO)**.

The Census is funded in large part by a grant from the Australian Government Department of Education. The Department of Education is working with the student accommodation sector to enhance public understanding of accommodation options available to both Australian and international students. For further information, please visit the website www.education.gov.au or www.aei.gov.au.

Given the Census is expected to raise the profile of the student accommodation sector nationally it is very important you respond. The previous census for the student accommodation sector was undertaken by UCA in 1999 and received a 100% response rate.

As part of the Census, information will be collected via an online survey and in some cases via paper based surveys, personal interviews and desk research. A national help desk (contact details below) has been established to assist with any questions you may have on how to complete the survey.

The survey will open in the next week or two. Depending on the size of your organisation, the survey should take about ten minutes to complete. You may be contacted by survey staff from Tertiary Balance Pty Ltd during the survey response period.

Questions will request information on student bed count, student demographics (including gender and whether undergraduate or postgraduate, Australian or international, type of institution and services offered). It is not anticipated the questions will be difficult or time-consuming to answer.

Your response to the Census will be kept confidential. Data published will be in aggregated form only. The results from the Census will not identify providers.

Your organisation's participation in the Census is greatly appreciated.

For further information and assistance during the survey period, please contact the Tertiary Balance help desk via email on census@tertiarybalance.com.au or via mobile number 0438 954 909.

Australian Government Statistical Clearing House Approval Number: 02396 – 01.

APPENDIX D: ONLINE SURVEY INSTRUMENT

National Census of Colleges, Halls and 100+ bed Commercial Student

The National Census of Colleges, Halls and 100+ bed Commercial Student Accommodation Providers **(Census)** is an initiative of University Colleges Australia **(UCA)** and is being undertaken with assistance from both the Australian Government and the Australasian Association of College and University Housing Officers **(AACUHO)**.

The Census is funded in large part by a grant from the Australian Government Department of Education. The Department of Education is working with the student accommodation sector to enhance public understanding of accommodation options available to both Australian and international students. For further information, please visit the website www.education.gov.au or www.aei.gov.au.

Given the Census is expected to raise the profile of the student accommodation sector nationally it is very important you respond. The previous census for the student accommodation sector was undertaken by UCA in 1999 and received a 100% response rate.

This survey which forms part of the Census contains up to 25 questions (depending on your answers there may be less). We have endeavoured to make them easy to answer. Before beginning the survey it will be helpful to familiarise yourself with your organisation's resident demographics and operations. The survey should take about ten minutes to complete.

Your response to the Census will be kept confidential. Data published will be in aggregated form only. The results from the Census will not identify providers.

If at any time you need to leave the survey, your answers will be saved automatically. You may return to complete the survey at any time before submitting it.

Your organisation's participation in this Census is greatly appreciated.

For assistance with this survey, please contact the Tertiary Balance help desk at **census@tertiarybalance.com.au** or via phone on **0438 954 909.**

Australian Government Statistical Clearing House Approval Number: 02396 - 01.

Contact Details

Please enter information which we can use to contact you with any further queries.

A PDF of your responses to the survey will be emailed to the address entered here for your records. Please allow three business days from the date of completion for this to arrive.

***1. Who is the person we should contact, if needed, in regards to this survey?**

***2. Please provide an email address.**

***3. Please provide a phone number for the contact person.**

Current or future student accommodation provider?

If you are currently developing a student accommodation facility but do not yet have residents, please answer "No".

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Australian Government Statistical Clearing House Approval Number: 02396-01

National Census of Colleges, Halls and 100+ bed Commercial Student

***4. Do you currently administer a student residence?**

- ◯ Yes
- ◯ No

Multiple Residences

Definition of student residence: a tertiary residential college, hall of residence, student accommodation facility, student hostel or student lodge.

***5. Does your organisation administer more than one student residence?**

- ◯ Yes
- ◯ No

Organisations that operate more than one student residence

You have indicated that your organisation administers more than one student residence.

Please complete the remaining questions in this survey so that we can collect some general information about your organisation.

Once you have completed the survey, we will contact you with a Microsoft Excel spreadsheet to enable you to provide information for each of your residences.

***6. What is the name of your organisation?**

***7. At how many campuses and off-campus locations does your organisation administer student residences within Australia?**

Thank you

As you are an organisation with more than one student residence, we will contact you and provide a survey instrument in Microsoft Excel format to input your residences' details.

***8. Please let us know a convenient date and time at which to contact you by phone. We will confirm this by email prior to calling you.**

Thank you

Thank you for completing the first stage of the National Census of Colleges, Halls and 100+ bed Commercial Student Accommodation Providers.

Clicking "Next" will cause you to submit and exit this survey.

Page 2

National Census of Colleges, Halls and 100+ bed Commercial Student

Please use the "Prev" button if you wish to go back and review your answers. Once this survey has been submitted you will not be able to alter it. If you wish to alter your answers please contact the Tertiary Balance help desk at **census@tertiarybalance.com.au** or phone **0438 954 909**.

General information

***9. What is the name of your residence?**

***10. What is the university that owns your student residence or with which your student residence is affiliated, and campus? If none, specify the university and campus attended by the largest number of residents.**

Name of University

Name of Campus

Location

***11. Is the student residence located on-campus or off-campus?**

- On-Campus
- Off-Campus

***12. What is the street address of the student residence?**

Street

Suburb/Town

State

Postcode

Ownership, management and affiliation

***13. What is the ownership type?**

- University owned and managed
- University owned and commercially managed
- Commercial student accommodation provider
- Church owned or affiliated
- Charitable trust (for example: letters patent but not church owned or affiliated)
- Other (please specify)

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National Census of Colleges, Halls and 100+ bed Commercial Student

14. What is the affiliated church, if affiliated?

Resident demographics

Please provide only information on onsite collegiate or apartment-style beds for the academic year. Please do not include any offsite stand-alone houses or apartments you may also administer away from the main accommodation facility, or residents (for example conference guests) staying on a casual basis outside of the main academic year.

If you are unsure about this question, please contact the Tertiary Balance help desk at **census@tertiarybalance.com.au** or phone **0438 954 909**.

*15. How many student beds/places are at the student residence?

*16. Is the student residence single-sex or co-ed?

- Co-ed
- Female only
- Male only

If co-ed, what is the number of female student residents?

For the next question, a resident may fall into more than one category (for example, a resident may be both undergraduate and indigenous). Please include these residents in your answer for both categories.

The answers below are not intended to add up to the total number of beds provided in your answer to the question above regarding how many student beds/places are at the student residence.

*17. What is the number of residents who are:

Undergraduates

Internationals

Indigenous or Torres Strait Islander

Catering arrangements

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National Census of Colleges, Halls and 100+ bed Commercial Student

***18. Does the student residence provide catering (including if catering is optional or if only some beds are catered and others are not)?**

- ◯ Yes, in-house staff
- ◯ Yes, contractor
- ◯ No
- ◯ Other (please specify)

Catering arrangements

***19. What number of student beds are catered?**

20. Is catering in the catered beds for a:

- ◯ Fixed number of meals per week
- ◯ Variable number of meals per week
- ◯ Fixed number of meals for some beds and variable number of meals for other beds

***21. For only those student residents who receive catering, how many meals per week are catered (on average) per student?**

22. Please provide any additional commentary on your student residence's catering arrangements here:

Bedroom types

***23. How many beds are in:**

Single bedrooms sharing a communal bathroom

Single bedrooms with a private ensuite

Single bedrooms with a shared ensuite

Twin-share bedrooms

Plans for expansion

Page 5

National Census of Colleges, Halls and 100+ bed Commercial Student

***24. Are you planning to increase the size of your student residence within the next three years?**

- ◯ Yes
- ◯ No
- ◯ Maybe

Thank you

Thank you for completing the National Census of Colleges, Halls and 100+ bed Commercial Student Accommodation Providers.

Clicking "Next" will cause you to submit and exit this survey.

Please use the "Prev" button if you wish to go back and review your answers. Once this survey has been submitted you will not be able to alter it. If you wish to alter your answers please contact the Tertiary Balance help desk at **census@tertiarybalance.com.au** or phone **0438 954 909**.

New development

***25. What will be the new total number of beds at this site following the proposed development (including pre-existing beds)?**

***26. Will the new beds be catered or self-catered?**

- ◯ Fully catered (21 meals per week)
- ◯ Partially catered (less than 21 meals per week)
- ◯ Variable meal plan
- ◯ Self-catered
- ◯ Mix of catered, variable meal plan and/or self-catered rooms
- ◯ Undecided

***27. Are the new beds to be offered to undergraduate or postgraduate students?**

- ◯ Undergraduate students only
- ◯ Postgraduate students only
- ◯ Both undergraduate and postgraduate students
- ◯ Undecided

New development

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National Census of Colleges, Halls and 100+ bed Commercial Student

***28. What is the street address of the proposed new development?**

Street

Suburb/Town

State

Postcode

Thank you

Thank you for completing the National Census of Colleges, Halls and 100+ bed Commercial Student Accommodation Providers.

Clicking "Next" will cause you to submit and exit this survey.

Please use the "Prev" button if you wish to go back and review your answers. Once this survey has been submitted you will not be able to alter it. If you wish to alter your answers please contact the Tertiary Balance help desk at **census@tertiarybalance.com.au** or phone **0438 954 909**.

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APPENDIX E: MULTIPLE-SITE ORGANISATION SURVEY INSTRUMENT

PROBLEMS?
Please click on the

National Census of Colleges, Halls and 100+ bed Commercial Student Accommodation Providers

Residence 01

Survey Instrument for Multiple-Residence Student Accommodation Providers

Name of residence/group of residences:

	AVAILABLE ANSWERS	
1. LOCATION		
Question 1		
What is the university that owns your student residence or with which your student residence is affiliated, and campus? If none, specify the university and campus attended by the largest number of residents.		
University:		
Campus:		
Question 2		
Is the student residence location on-campus or off-campus?	On Campus Off Campus	
Question 3		
What is the street address of the student residence?		
Street:		
Suburb/Town:		

Australian Government Statistical Clearing House Approval Number: 02396-01

Appendix E: Multiple-site organisation survey instrument

State:		
Postcode:		
2. OWNERSHIP, MANAGEMENT AND AFFILIATION		
Question 4		
What is the ownership type?	University owned and managed University owned and commercially managed Commercial student accommodation provider Church owned or affiliated Other	
If "Other", please specify:		
Question 5		
Does the student residence have a religious affiliation or is it church owned?	Yes No	
If "Yes", please specify:		
3. RESIDENT DEMOGRAPHICS		
Question 6		
How many student beds/places are at the student residence?		
Question 7		

Is the student residence single-sex or co-ed?	Co-Ed Female only Male only	
If Co-Ed, what is the number of female residents?		
Question 8		
What is the number of residents who are:	A resident may fall into more than one category (for example, a resident may be both undergraduate and indigenous). Please include these residents in your answer for both categories. The answers to this question are not intended to add up	
Undergraduates		
Internationals		
Indigenous or Torres Strait Islander		
4. CATERING ARRANGEMENTS		
Question 9		
Does your student residence provide catering (including if catering is optional or if only some beds are catered and others are not)?	Yes, in-house staff Yes, contractor No Other	
If "Other", please specify:		
If you answer "No" to Question 9, please skip to Q14.		
Question 10		
What number of student beds are catered?		
Question 11		
Is catering in the catered beds for a:	Fixed number of meals per week Variable number of meals per week Fixed number of meals for some beds and variable number of meals for other beds	

Question 12		
For only those student residents who receive catering, how many meals per week are catered (on average) per student?		
Question 13		
Please provide any additional commentary on your student residence's catering arrangements here:		
5. BEDROOM TYPES		
Question 14		
How many beds are in:		
Single bedrooms sharing a communal bathroom		
Single bedrooms with a private ensuite		
Single bedrooms with a shared ensuite		
Twin-share bedrooms		
6. PLANS FOR EXPANSION		
Question 15		
Are you planning to increase the size of your student residence within the next three years?	Yes No Maybe	
If you anwer "No" to Q15, there are no further questions to be answered for the selected residence.		

7. NEW DEVELOPMENT		
Question 16		
What will be the new total number of beds at this site following the proposed development (including pre-existing beds)?		
Question 17		
Will the new beds be catered or self-catered?	Fully catered (21 meals per week) Partially catered (less than 21 meals per week) Variable meal plan Self-catered Mix of catered, variable meal plan and/or self-catered rooms Undecided	
Question 18		
Are the new beds to be offered to undergraduate or postgraduate students?	Undergraduate students only Postgraduate students only Both undergraduate and postgraduate students Undecided	
What is the street address of the proposed new development? Street:		
Suburb/Town:		
State:		
Postcode:		
Thank you for completing the National Census of Colleges, Halls and 100+ bed Commercial Student Accommodation Providers.		

APPENDIX F: SUMMARY OF SURVEY RESPONSES

Response rates are given as a proportion of sites that gave an overall response, and also answered a specified question. Some sites did respond to the survey instrument, but nevertheless declined to answer certain questions.

Caution should be used when referring to the figures derived from survey responses data in this report. Where sites have not responded to the survey instrument or have not answered all questions in the survey instrument, desk research has been used where possible to gather information in those sites.

The figures provided below relate only to the information provided in the survey responses and do not include the figures derived from desk research.

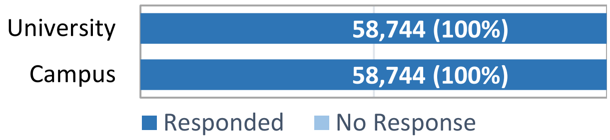
Some response rates will be further segmented depending on the requirements of the question. For example, not all survey participants were asked for the number of catered places they offer; only participants that answered 'yes' to providing catering were able to view the subsequent question.

Given only 259 of the 315 sites nationally responded to the survey there is a chance the answers provided by the respondents might not be an accurate indicator of the characteristics of the total population of residents in all 315 sites.

For the responses to the questions in the survey relating to females, undergraduates, internationals, indigenous and catering, the confidence in the precision of the sample is expressed as a 95 per cent confidence interval.

General Information

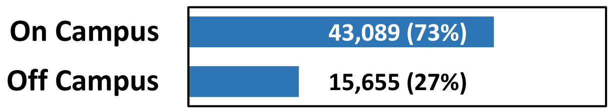
Question: what is the university that owns your student residence or with which your student residence is affiliated, and campus? If none, specify the university and campus attended by the largest number of residents.



Location

Question: Is the student residence located on-campus or off-campus?

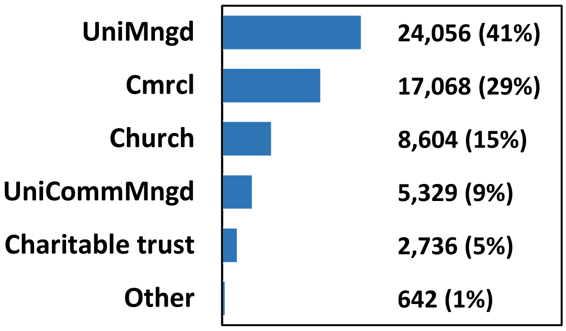
- On Campus
- Off Campus



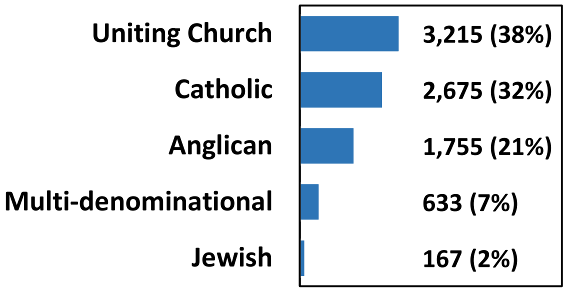
Ownership and management type

Question: What is the ownership type?

- University owned and managed
- University owned and commercially managed
- Commercial student accommodation provider
- Church owned or affiliated
- Charitable trust (for example: letters patent but not church owned or affiliated)
- Other (please specify)

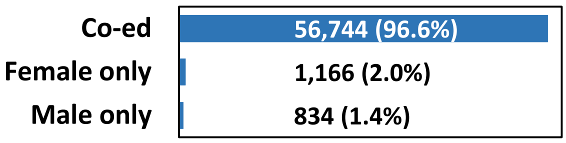


Question: What is the affiliated church, if affiliated?

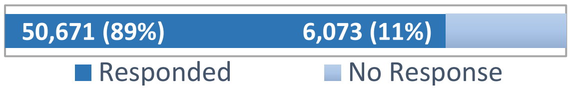


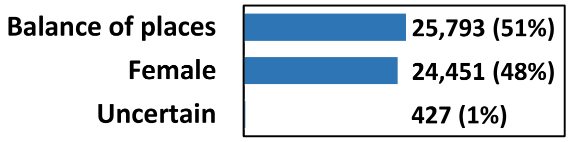
Demographics

Question: Is the student residence single sex or co-ed?



Question: If co-ed, what is the number of female student residents?

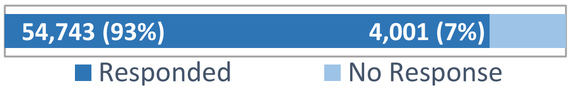


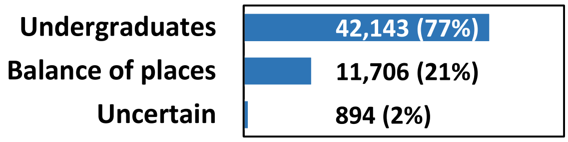


'Uncertain' responses occurred where the value given was an outlier and suspected to be an error. The 'balance of places' responses are the remaining places at the site not occupied by females.

The 95 per cent confidence interval for the result that 48 per cent of the residents in the co-ed sites are female, is 46.6 per cent to 50.0 per cent.

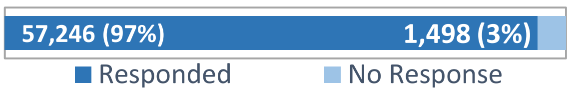
Question: What is the number of residents who are undergraduates?

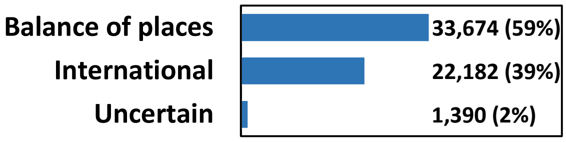




The 95 per cent confidence interval for the result that 77 per cent of the residents are undergraduates, is 74.4 per cent to 79.6 per cent.

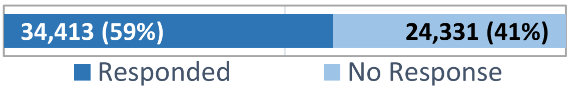
Question: What is the number of residents who are internationals?

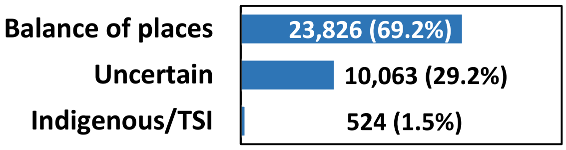




The 95 per cent confidence interval for the result that 39 per cent of the residents are internationals, is 35.1 per cent to 42.3 per cent.

Question: What is the number of residents who are Indigenous or Torres Strait Islander?



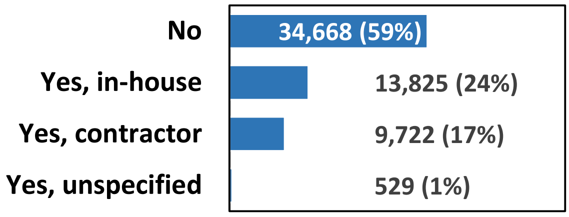


The 95 per cent confidence interval for the result that 1.5 per cent of residents are Indigenous or Torres Strait Islander, is 1.0 per cent to 2.0 per cent.

Catering type

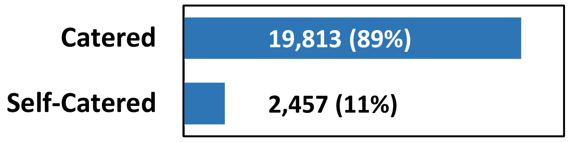
Question: Does the student residence provide catering (including if catering is optional or if only some beds are catered and others are not)?

- Yes, unspecified
- Yes, in-house staff
- Yes, contractor
- No



Question: If catered, what number of student beds are catered?

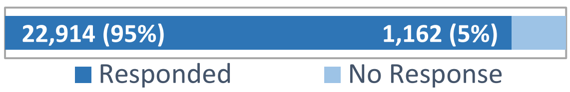
There are 24,076 places in catered sites identified by the survey. In these sites, not every place was necessarily catered. Catered sites were asked to advise what proportion of their accommodation was catered.

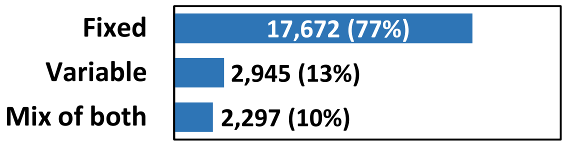


The 95 per cent confidence interval for the result that 89 per cent of the student beds in sites that offer some form of catering, are catered, is 84.5 per cent to 93.5 per cent.

Question: Is catering in the catered beds for a:

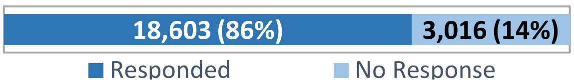
- Fixed number of meals per week
- Variable number of meals per week
- Fixed number of meals for some beds and variable number of meals for other beds





Question: For only those student residents who receive catering, how many meals per week are catered (on average) per student?

The response rate given reflects only catered places, of which there are 21,619. This figure does not include places in catered sites which are self-catered.

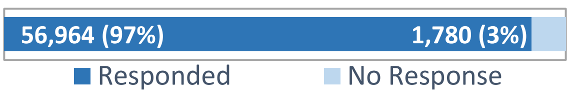


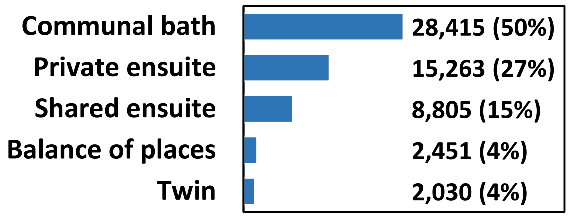
For the places which received catering and answered the meals per week question, there was a weighted average of 19.4 catered meals per week.

Accommodation Style

Question: How many beds are in:

- Single bedrooms sharing a communal bathroom
- Single bedrooms with a private ensuite
- Single bedrooms with a shared ensuite
- Twin-share bedrooms

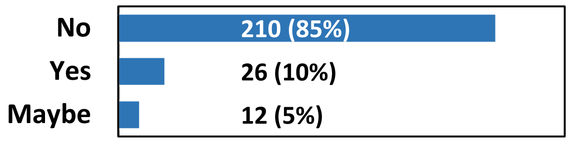




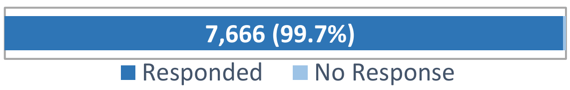
Plans for expansion

Question: Are you planning to increase the size of your student residence within the next three years?

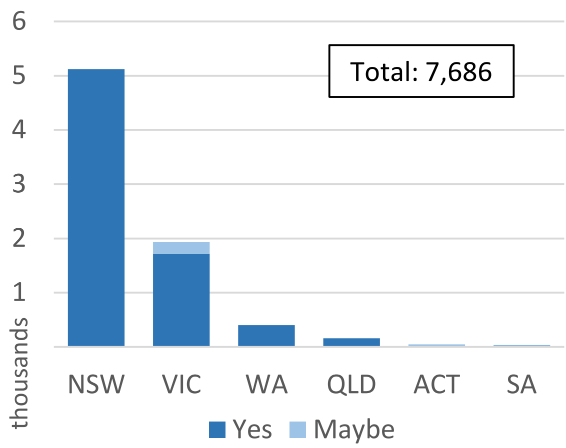
The response rates for the expansion question are given as number of sites.



Question: What will be the new total number of beds at this site following the proposed developments (including preexisting beds)?



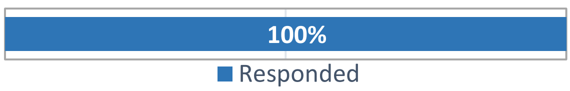
The number of reported additional beds within these sites is 7,686 of which 263 places were reported by respondents who answered 'Maybe' and 7,423 places were reported by respondents who answered 'Yes' to the previous question.

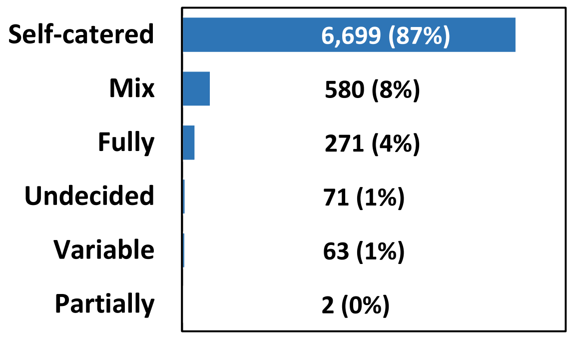


The sites that responded and answered ‘Yes’ or ‘Maybe’, were asked the following series of questions to do with plans for expansion.

Question: Will the new beds be catered or self-catered?

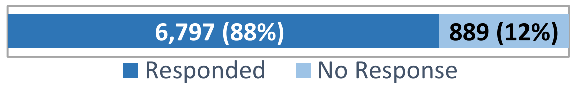
- Fully catered (21 meals per week)
- Partially catered (less than 21 meals per week)
- Variable meal plan
- Self-catered
- Mix of catered, variable meal plan and/or self-catered rooms
- Undecided

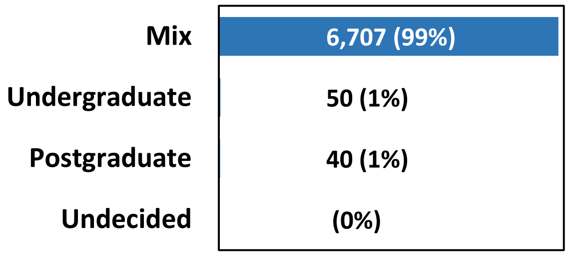




Question: Are the new beds to be offered to undergraduate or postgraduate students?

- Undergraduate students only
- Postgraduate students only
- Both undergraduate and postgraduate students
- Undecided





APPENDIX G: CALCULATION OF THE NUMBER OF MOBILE HIGHER EDUCATION STUDENTS

The number of mobile international, domestic-interstate and domestic-intrastate students by state for the years 2004 and 2013 is summarised in Tables G1 & G2 in this Appendix. The numbers of international students and domestic-interstate mobile students in these Tables are derived from data provided by the department of Education and Training on 8 January 2015 (refer to Tables G3, 4, 5 & 6 below). The numbers of domestic-intrastate mobile students in Tables G1 & G2 were derived by counting all unit data records for full-time, internal students where campus postcode is ≥ 60 km from student permanent residential post-code.

Domestic-interstate mobile students are all full time, internal, domestic students enrolled in Australian higher education courses in 2004 and 2013 where the state of the student's home residence is different from the state of the higher education institution at which the student is enrolled. This data, which is used in Figures 8 & 52 of this Census Report is derived from Tables G3 & G4 in this Appendix, not including multi-state students or those with 'no-information' or which were 'outside Australia'. This and the de-identified unit data for Tables G1 & G2 was provided by the Department of Education and Training over 8 & 22 January 2015.

International students are onshore, internal, full-time international students enrolled in Australian Higher Education courses in 2004 and 2013. This data, which is used in Figures 8 & 52 in this Census report, is derived from Tables G5 & G6 in this Appendix. This data was provided by the Department of Education and Training on 8 January 2015.

The total number of on-shore and off-shore higher education international students counting all study modes for 2013 is shown in Table G6 as 328,402. This number reconciles with that given in Table 7.5 of the Department of Education and Training Selected Higher Education Statistics – 2013 Student Data Full Year Data for the 2013 overseas students.[155]

155 Australian Department of Education and Training 2013, Selected Higher Education Statistics – 2013 Student Data – Full year Data – 2013 Overseas Students. Table 7.5.

Appendix G: Calculation of the number of mobile higher education students

Table G1: Tally of mobile students by State in 2004
Data relates to the 2004 year

Reference year = 2004

	Mobile Category			
	Internationals	Domestic Interstates	Domestic Intrastates	TOTAL
New South Wales	44,473	5,558	13,660	63,691
Victoria	44,327	5,073	14,706	64,106
Queensland	31,008	4,204	13,377	48,589
Western Australia	13,186	1,248	3,251	17,685
South Australia	7,473	1,056	1,685	10,214
Australian Capital Territory	2,974	2,645		5,619
Tasmania	1,487	830	2,290	4,607
Northern Territory	159	273	253	685
TOTAL	**145,087**	**20,887**	**49,222**	**215,196**

Table G2: Tally of mobile students by State in 2013
Data relates to the 2013 year

Reference year = 2013

	Mobile Category			
	Internationals	Domestic Interstates	Domestic Intrastates	TOTAL
New South Wales	66,748	11,273	17,597	95,618
Victoria	69,365	8,829	17,980	96,174
Queensland	38,207	6,783	15,042	60,032
Western Australia	17,728	5,352	4,793	27,873
South Australia	15,731	2,354	2,422	20,507
Australian Capital Territory	6,181	4,808		10,989
Tasmania	2,569	832	1,331	4,732
Northern Territory	780	118	38	936
TOTAL	**217,309**	**40,349**	**59,203**	**316,861**

Table G3: All domestic students by method of study, state of permanent home residence and state of higher education provider of study
Table provided by the Australian Government Department of Education and Training
Data relates to the 2004 year

Method of study, state of permanent home residence		State of higher education institution of study									TOTAL
		NSW	VIC	QLD	WA	SA	TAS	NT	ACT	Multi-State	
Internal, full-time	New South Wales	111,130	1,688	2,203	131	201	209	37	1,810	2,639	120,048
	Victoria	1,368	99,602	628	159	382	277	40	417	2,626	105,499
	Queenslanc	1,160	554	70,036	136	83	182	163	168	1,272	73,754
	Western Australia	243	278	104	40,074	56	50	np	51	< 5	40,898
	South Australia	234	373	161	132	27,202	37	33	48	7	28,227
	Tasmania	173	477	96	55	42	9,319	< 5	59	< 5	10,224
	Northern Territory	109	124	168	79	153	27	1,247	52	-	1,959
	Australian Capital Territory	1,423	236	85	15	np	8	< 5	5,988	249	8,053
	Outside Australia	848	1,343	759	541	139	40	< 5	40	np	3,729
	No information	113	276	11	28	< 5	49	-	-	np	483
	TOTAL	**116,801**	**104,951**	**74,251**	**41,350**	**28,306**	**10,198**	**1,566**	**8,633**	**6,818**	**392,874**
Other*	New South Wales	93,769	3,869	3,666	559	534	168	128	2,462	1,552	106,707
	Victoria	5,626	58,439	1,518	421	729	158	257	237	1,246	68,631
	Queenslanc	6,268	2,052	56,012	455	383	153	341	203	992	66,859
	Western Australia	1,317	976	601	25,259	220	57	269	69	9	28,777
	South Australia	1,599	1,164	464	179	18,233	53	115	67	67	21,941
	Tasmania	694	593	263	138	115	3,980	26	22	41	5,872
	Northern Territory	517	279	403	87	210	25	3,003	32	34	4,590
	Australian Capital Territory	2,890	739	520	107	121	20	20	8,820	245	13,482
	Outside Australia	2,113	1,660	1,348	619	270	52	19	46	82	6,209
	No information	141	204	35	17	12	50	17	5	15	496
	TOTAL	**114,934**	**69,975**	**64,830**	**27,841**	**20,827**	**4,716**	**4,195**	**11,963**	**4,283**	**323,564**
TOTAL		**231,735**	**174,926**	**139,081**	**69,191**	**49,133**	**14,914**	**5,761**	**20,596**	**11,101**	**716,438**

Other includes internal part-time; external full-time and part-time; and multi-modal full-time and part-time.

np not published

Source: Higher Education Student Collection, Department of Education. Report produced on 08JAN2015 .

Author: Claire Hoffman

RFI: 15-004 Nerlich

Table G4: All domestic students by method of study, state of permanent home residence and state of higher education provider of study
Table provided by the Australian Government Department of Education and Training
Data relates to the 2013 year

Method of study, state of permanent home residence		State of higher education institution of study									TOTAL
		NSW	VIC	QLD	WA	SA	TAS	NT	ACT	Multi-State	
Internal, full-time	New South Wales	150,324	2,970	3,493	4,223	428	237	33	2,759	6,330	170,797
	Victoria	3,326	132,443	1,142	299	839	297	20	798	6,238	145,402
	Queensland	3,125	1,128	88,913	212	158	158	25	370	3,019	97,108
	Western Australia	632	715	253	52,253	83	62	9	206	66	54,279
	South Australia	387	525	250	87	36,325	35	19	158	30	37,816
	Tasmania	286	725	199	39	74	6,533	< 5	109	np	7,984
	Northern Territory	126	237	268	78	355	7	532	55	7	1,665
	Australian Capital Territory	1,222	416	174	35	59	27	< 5	5,761	np	8,166
	Outside Australia	2,169	2,113	1,004	379	358	9	12	353	56	6,453
	No information	62	66	28	40	6	6	-	39	-	247
	TOTAL	**161,659**	**141,338**	**95,724**	**57,645**	**38,685**	**7,371**	**653**	**10,608**	**16,234**	**529,917**
Other*	New South Wales	123,668	6,198	6,061	3,081	1,681	2,700	1,088	4,550	3,897	152,924
	Victoria	10,679	74,548	3,416	1,589	1,602	969	1,219	881	2,769	97,672
	Queensland	10,346	3,624	70,465	1,314	1,146	582	697	413	2,116	90,703
	Western Australia	2,891	1,559	1,395	36,059	676	215	514	211	214	43,734
	South Australia	1,952	1,362	982	446	22,137	272	1,698	382	156	29,387
	Tasmania	898	633	353	163	195	9,672	np	np	41	12,092
	Northern Territory	656	406	457	195	390	54	3,555	71	27	5,811
	Australian Capital Territory	3,293	779	500	205	198	130	84	10,552	308	16,049
	Outside Australia	3,021	1,342	1,100	420	285	17	84	262	98	6,629
	No information	93	63	51	17	202	20	< 5	np	-	456
	TOTAL	**157,497**	**90,514**	**84,780**	**43,489**	**28,512**	**14,631**	**9,024**	**17,384**	**9,626**	**455,457**
TOTAL		**319,156**	**231,852**	**180,504**	**101,134**	**67,197**	**22,002**	**9,677**	**27,992**	**25,860**	**985,374**

**Other includes internal part-time; external full-time and part-time; and multi-modal full-time and part-time.*

np not published

Source: Higher Education Student Collection, Department of Education. Report produced on 08JAN2015 .

Author: Claire Hoffman

RFI: 15-004 Nerlich

Table G5: International students, by onshore/offshore indicator, mode of attendance and state of higher education provider of study
Table provided by the Australian Government Department of Education and Training
Data relates to the 2004 year

Onshore/offshore indicator and mode of attendance		State of higher education institution of study									TOTAL
		NSW	VIC	QLD	WA	SA	TAS	NT	ACT	Multi-State	
Onshore	External	3,468	977	8,280	396	269	117	25	8	157	13,697
	Internal	44,473	44,327	31,008	13,186	7,473	1,487	159	2,974	1,291	146,378
	Multi-modal	707	1,287	875	265	214	5	24	1,059	8	4,444
	TOTAL	**48,648**	**46,591**	**40,163**	**13,847**	**7,956**	**1,609**	**208**	**4,041**	**1,456**	**164,519**
Offshore	External	5,723	4,238	236	224	642	< 5	-	np	142	11,217
	Internal	12,514	15,882	2,971	10,231	7,762	np	32	np	-	51,672
	Multi-modal	62	118	118	100	9	-	-	724	-	1,131
	TOTAL	**18,299**	**20,238**	**3,325**	**10,555**	**8,413**	**1,545**	**32**	**1,471**	**142**	**64,020**
TOTAL		**66,947**	**66,829**	**43,488**	**24,402**	**16,369**	**3,154**	**240**	**5,512**	**1,598**	**228,539**

'Offshore' includes students whose state/territory of term location was outside Australia and their campus location indicator was offshore.

'Onshore' includes students whose campus loction was onshore and/or their state/territory of term location was in Australia.

np not published

Source: Higher Education Student Collection, Department of Education. Report produced on 08JAN2015 .

Author: Claire Hoffman

RFI: 15-004 Nerlich

Table G6: International students, by onshore/offshore indicator, mode of attendance and state of higher education provider of study
Table provided by the Australian Government Department of Education and Training
Data relates to the 2013 year

Onshore/offshore indicator and mode of attendance		State of higher education institution of study									TOTAL
		NSW	VIC	QLD	WA	SA	TAS	NT	ACT	Multi-State	
Onshore	External	2,031	1,223	4,382	235	335	163	50	163	34	8,616
	Internal	66,748	69,365	38,207	17,728	15,731	2,569	780	6,181	2,836	220,145
	Multi-modal	4,031	3,367	2,348	1,271	999	462	317	2,054	7	14,856
	TOTAL	**72,810**	**73,955**	**44,937**	**19,234**	**17,065**	**3,194**	**1,147**	**8,398**	**2,877**	**243,617**
Offshore	External	366	821	-	np	-	-	-	-	np	1,443
	Internal	13,706	37,553	5,084	17,616	4,629	1,686	-	925	-	81,199
	Multi-modal	41	568	119	np	1,315	-	-	50	< 5	2,143
	TOTAL	**14,113**	**38,942**	**5,203**	**17,734**	**5,944**	**1,686**	**-**	**975**	**188**	**84,785**
TOTAL		**86,923**	**112,897**	**50,140**	**36,968**	**23,009**	**4,880**	**1,147**	**9,373**	**3,065**	**328,402**

'Offshore' includes students whose state/territory of term location was outside Australia and their campus location indicator was offshore.

'Onshore' includes students whose campus loction was onshore and/or their state/territory of term location was in Australia.

np not published

Source: Higher Education Student Collection, Department of Education. Report produced on 08JAN2015 .

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APPENDIX H: GREATER METROPOLITAN CAPITAL CITY BOUNDARIES USED

The greater metropolitan capital city boundaries referenced in figures 14, 27, 28, 42, 45, 55, 66, 67 and 68 in this report are defined differently from the regional/metropolitan boundaries used elsewhere in this report and which are described in detail in Appendix A.

The greater metropolitan capital city boundaries are defined based on Greater Capital City Statistical Areas (GCCSA's) defined by the Australian Bureau of Statistics (ABS) (see map below). The GCCSA's were created to include the entire 'socio-economic extent' of each of the capital cities based on data from the ABS 2011 Census. This includes the inner city areas, as well as the surrounding suburban metropolitan areas but excludes any metropolitan areas that do not surround a capital city. For example Strathfield in Sydney is included as it forms part of the greater metropolitan area of Sydney but the city of Newcastle in NSW is excluded as it lies outside the capital.

As of 25 May 2015 digital maps of GCCSA's were available online from the Australian Statistical Geography Standard (ASGS) Volume 1 on the ABS website (GCCSA maps for Sydney, Melbourne and Brisbane only are provided in this Appendix) at:

<http://www.abs.gov.au/websitedbs/D3310114.nsf/4a256353001af3ed4b2562bb00121564/6b6e07234c98365aca25792d0010d730/$FILE/Greater%20Capital%20City%20Statistical%20Area%20-%20Fact%20Sheet.pdf>

Figure H1: Map showing extent of the Greater Capital City Statistical Areas (GCCSA's) for each of the eight Australian State and Territory capital cities

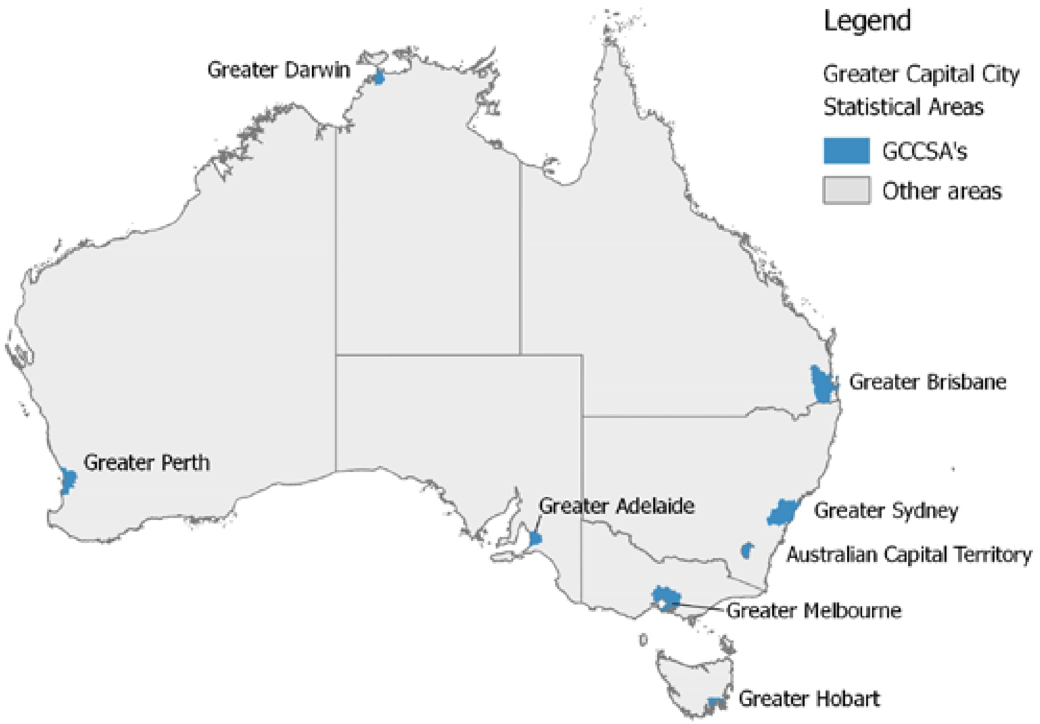
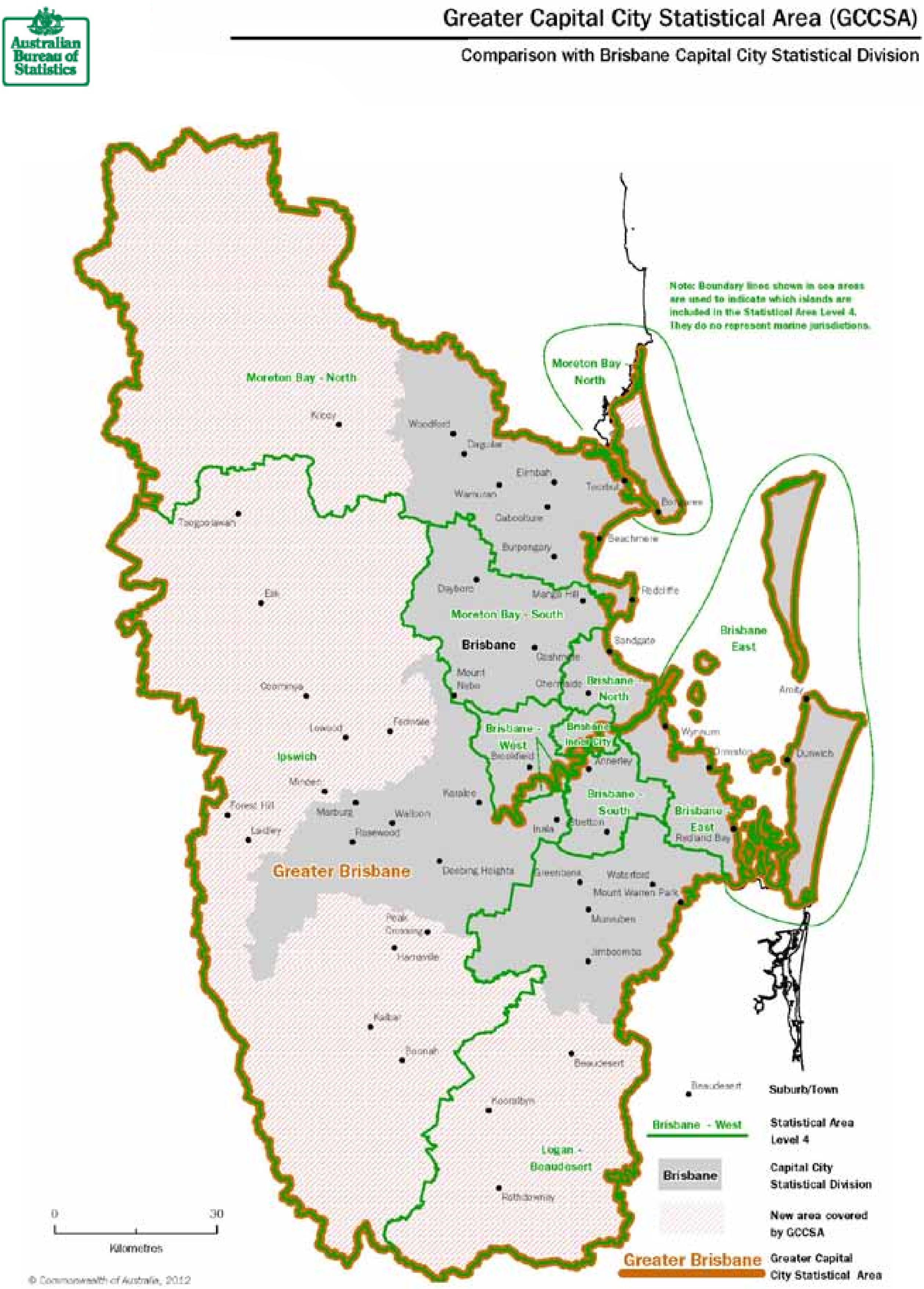


Figure H2: ABS Map for the Sydney GCCSA

Figure H3: ABS Map for the Melbourne GCCSA

Figure H4: ABS Map for the Brisbane GCCSA



APPENDIX I: UNIVERSITY GROUPINGS AND ABBREVIATIONS

Group of Eight (Go8)

Australian National University (ANU)
Monash University (Monash)
The University of Adelaide (Adelaide)
The University of Melbourne (UniMelb)
The University of New South Wales (UNSW)
The University of Queensland (UQ)
The University of Sydney (USYD)
The University of Western Australia (UWA)

Non-aligned*

Australian Catholic University (ACU)
Bond University (Bond)
Charles Sturt University (CSU)
Deakin University (Deakin)
Edith Cowan University (ECU)
Macquarie University (MQ)
Swinburne University of Technology (SUT)
University of Canberra (UC)
The University of Notre Dame Australia (ND)
University of Tasmania (UTAS)
University of Western Sydney (UWS)
University of Wollongong (UoW)
Victoria University (VU)

Regional Universities Network (RUN)

Central Queensland University (CQU)
Federation University Australia (FedUni)
Southern Cross University (SCU)
The University of New England (UNE)
University of Southern Queensland (USQ)
University of the Sunshine Coast (USC)

Australian Technology Network (ATN)

Curtin University (Curtin)
Queensland University of Technology (QUT)
RMIT University (RMIT)
University of South Australia (UniSA)
University of Technology Sydney (UTS)

Innovative Research Universities (IRU)

Charles Darwin University (CDU)
Flinders University (Flinders)
Griffith University (Griffith)
James Cook University (JCU)
La Trobe University (La Trobe)
Murdoch University (Murdoch)
The University of Newcastle (UoN)

* 'Non-aligned' means the university concerned is not aligned with any of the university groups (Go8, RUN, ATN & IRU). Note that all universities shown in this Appendix, whether or not aligned with a particular university group, are members of Universities Australia.

APPENDIX J: CONFIDENCE INTERVAL CALCULATION

For each of the following groups,

- Female
- Undergraduate
- International
- Indigenous or Torres Strait Islander, and
- Catered accommodation

The average percentage of student residents (attending the colleges/CSAPs which responded to the relevant survey question) that the group makes up was calculated. Confidence Intervals have been constructed to convey how well this average reflects that of the total population (all students residing at university colleges/CSAPs in Australia).

The Confidence Interval calculation process is outlined below.

Find:

- the mean percentage of group being considered:
  $\overline{x} = \Sigma x/n$
- the standard deviation of the sample:
  $\sigma = \sqrt{((\Sigma(x - \overline{x})2)/(n - 1))}$
- the standard error:
  $\sigma\overline{x} = \sigma/(\sqrt{n})$
  and hence,
- the 95% confidence interval ($z = 1.96$):
  $\overline{x} - (1.96\ \sigma\overline{x}) \leq \mu \leq \overline{x} + (1.96\ \sigma\overline{x})$

LEGEND:
n – number of colleges/CSAPs that responded to the survey question.

Sample mean ($\overline{x}$) – average group percentage in all colleges/CSAPs that responded to the survey question.

Estimated population mean (μ) – estimate of the average group percentage of all colleges/CSAPs in Australia based on survey data.

APPENDIX K: INDICATIVE RELATIVE DENSITIES OF MOBILE STUDENTS BY TERM POSTCODE

This Appendix contains maps produced by Tertiary Balance Pty Ltd using de-identified higher education student unit data for the 2013 year from the Department of Education and Training (The Department). Mobile domestic students are defined as those having a term residential postcode (data element E319) different to their permanent home residential postcode (data element E320) and where the distance between the two postcodes is 60 km or more. Due to the extent of reporting errors in E319 term postcode[156] the actual density of mobile domestic students per square km is not shown. Notwithstanding the reporting errors in E319 it is possible to show the relative density of students per square km in these maps. Mobile domestic students at all higher education provider campuses in the Sydney, Melbourne and Brisbane areas are included in this analysis. Only some of the major campuses are marked on the maps.

Figures K1, K3 & K5: provide maps showing the indicative relative densities of full-time mobile domestic internal-mode higher education students as students / square km by postcode according to term residential address postcodes reported by students in the Melbourne, Sydney and Brisbane areas respectively.

Figures K2, K4 & K6: provide maps showing the indicative relative densities of full-time on-shore international internal-mode higher education students as students / square km by postcode according to term residential postcodes reported by students in the Melbourne, Sydney and Brisbane areas respectively but not counting cases where the student term residential postcode is the same as the postcode of the campus attended by the student.

International student records where the term residential postcode is the same as the postcode of the campus attended by the student, were not released by the Department for privacy reasons. The extent to which the indicative relative densities shown on the international student maps in this Appendix (Figures K2, K4 and K6) are distorted due to non-inclusion of these records is related to the enrolment at the campuses present in that postcode. Cross hatching has been used to indicate postcodes where the indicative relative density may be understated. Postcodes are cross hatched where the sum of all EFTSL (equivalent full time student load) whether domestic or international and whether mobile or otherwise attending all higher education provider campuses located in that postcode is in excess of 1,000 but not counting any of the EFTSL from any higher education provider campuses in that postcode where the individual campus has fewer than 100 EFTSL. This method has been adopted to limit cross hatching to only those postcodes where there is potential for a material understatement of the indicative relative density of international student term residences.

As of 2013 there were approximately 2.2 times as many on-shore internal-mode higher education international students as there were domestic higher education mobile students – calculated from the figures in Table G2 in Appendix G as 217,309 / (40,349 + 59,203). The indicative relative densities shown on the maps for the domestic students in this Appendix (Figures K1, K3 & K5) are not comparable to the indicative relative densities shown on the maps for the international students in this Appendix (Figures K2, K4 & K6). For example the use of the same colour or a darker colour in Figure K2 for the same postcode in Figure K1 would indicate there are fewer mobile domestic students than there are international students, living during term in that postcode as there are mobile international students.

156 Jack, M 2014. Research note detailing reporting errors in the Higher Education Information Management System (HEIMS) data element E319 term residential postcode.

Figure K1: Indicative relative density of mobile domestic higher education students in Melbourne by term residential postcode in 2013

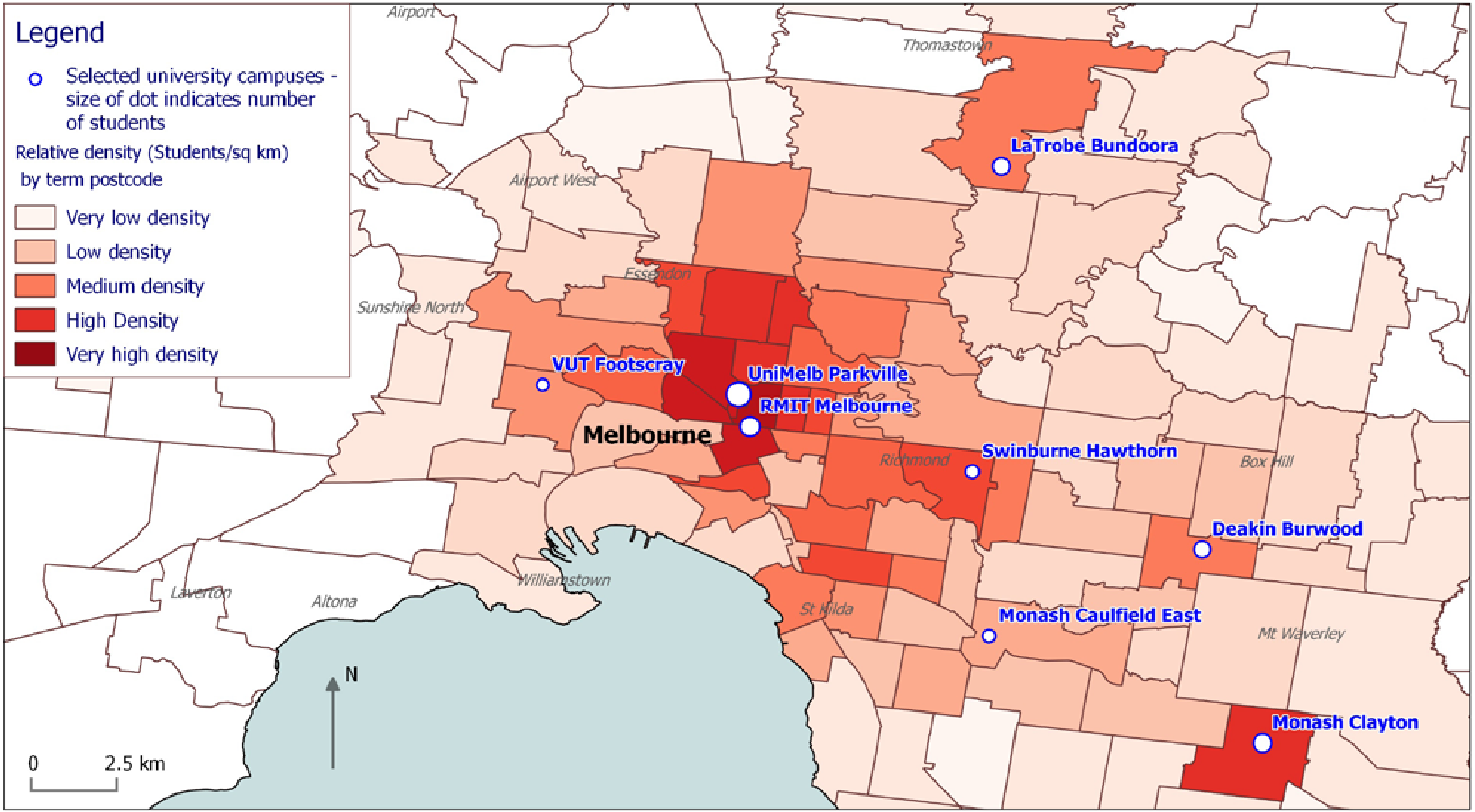


Figure K2: Indicative relative density of international higher education students in Melbourne whose term residential postcode is not the same as their campus postcode, by term residential postcode in 2013

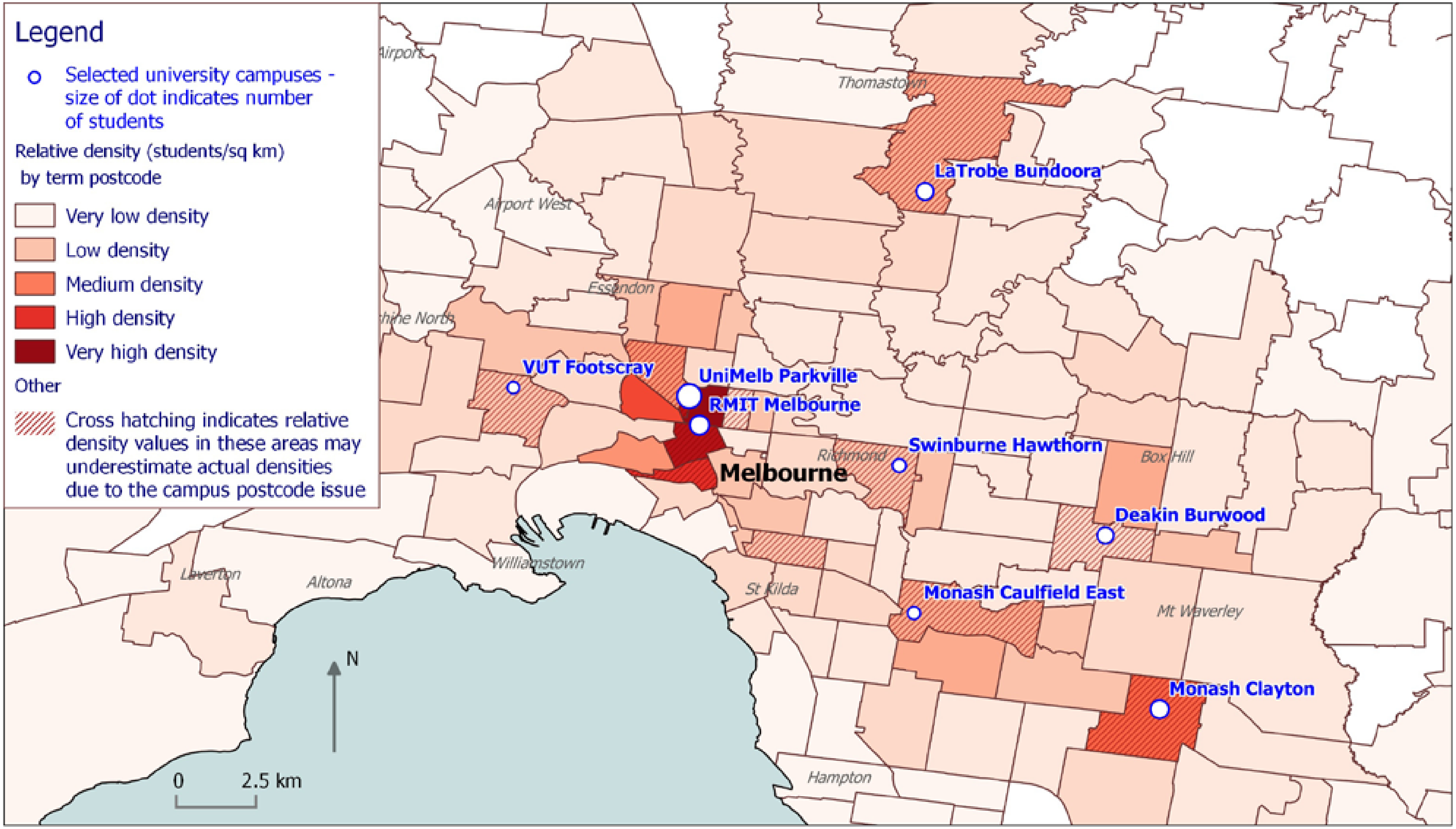


Figure K3: Indicative relative density of mobile domestic higher education students in Sydney by term residential postcode in 2013

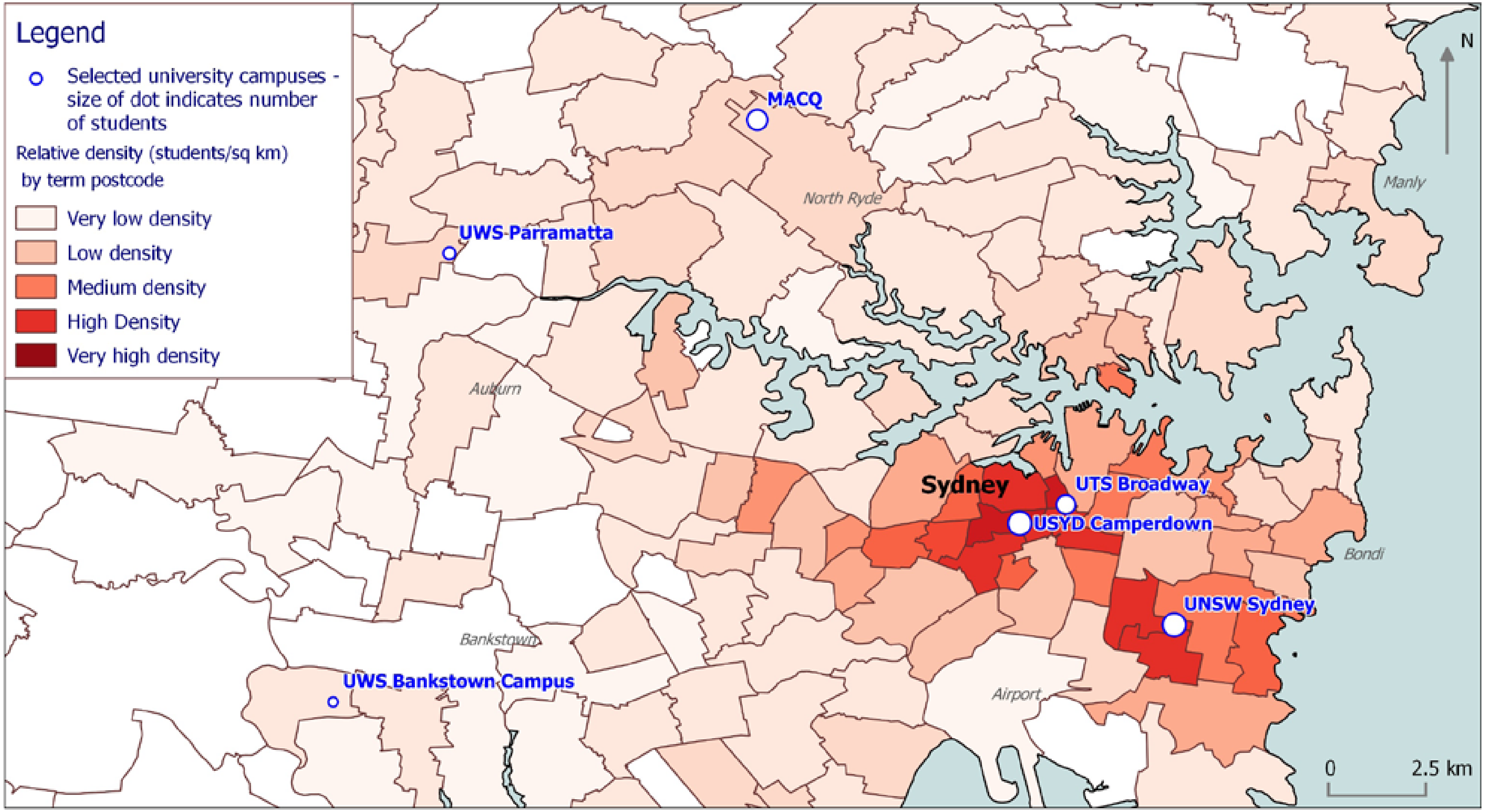


Figure K4: Indicative relative density of international higher education students in Sydney whose term residential postcode is not the same as their campus postcode, by term residential postcode in 2013

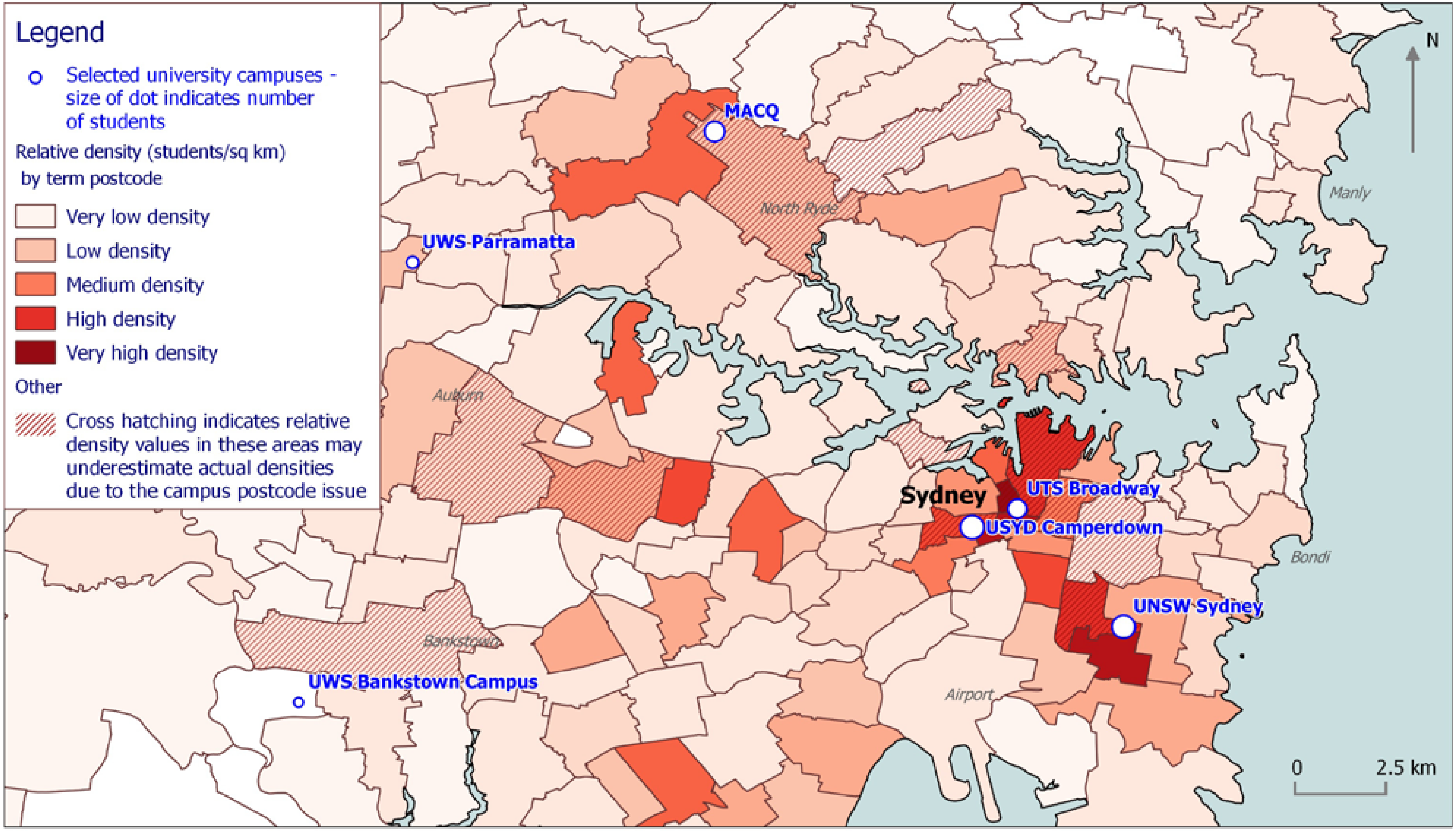


Figure K5: Indicative relative density of mobile domestic higher education students in Brisbane by term residential postcode in 2013

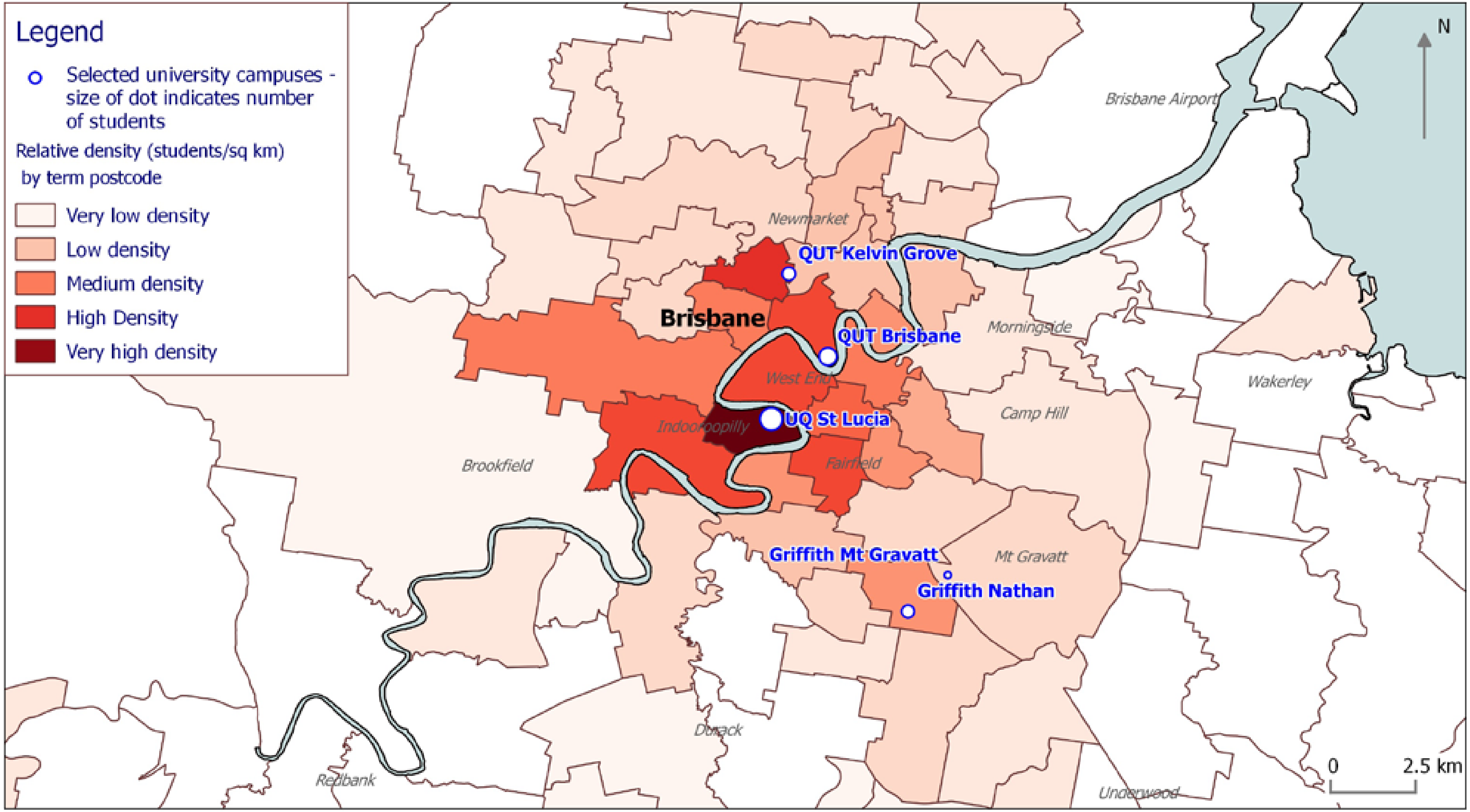
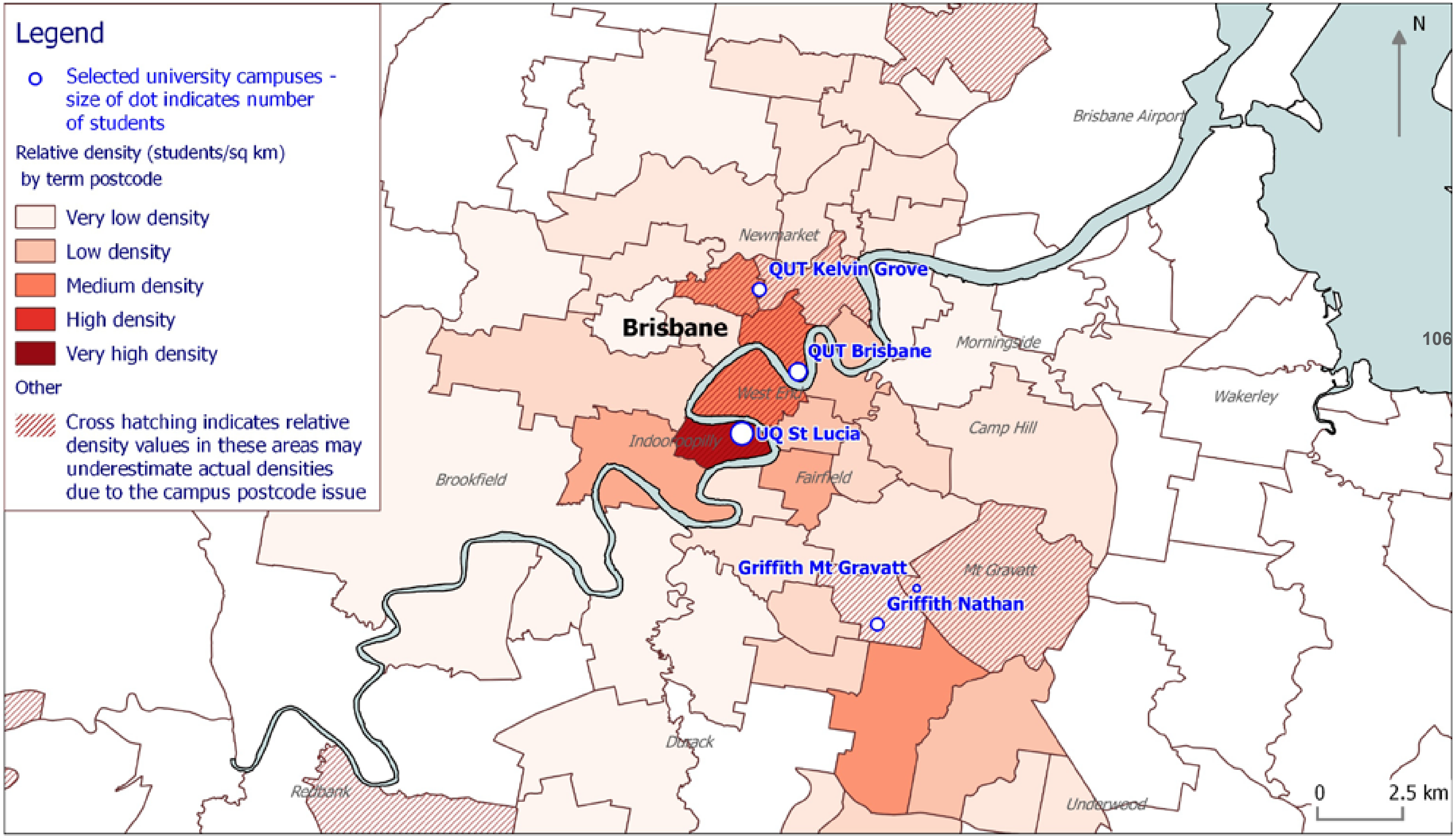


Figure K6: Indicative relative density of international higher education students in Brisbane whose term residential postcode is not the same as their campus postcode, by term residential postcode in 2013



APPENDIX L: ABBREVIATIONS AND TERMS

1999 Census	The national census of Australian colleges and halls of residence conducted by University Colleges Australia in April 1999.
2012 ISS	The 2012 International Student Survey conducted by Australian Education International.
2014 Census	The National Census of University Student Accommodation Providers 2014, conducted by Tertiary Balance Pty Ltd on behalf of University Colleges Australia in October 2014.
AACUHO	Australasian Association of College and University Housing Officers.
AAHCHI	Australian Association of Heads of Colleges and Halls Incorporated. The precursor Association to AHAUCHI
ABS	Australian Bureau of Statistics.
ACER	Australian Council for Educational Research.
ACUHO-I	Association of College and University Housing Officers – International. Based out of Columbus, Ohio, USA.
AEI	Australian Education International (a Group within the Australian Government Department of Education and Training).
AHAUCHI	Association of Heads of Australian University Colleges and Halls. The precursor Association (prior to November 2010) to University Colleges Australia.
AHRC	Australasian Housing Researchers Conference.
AHRCHUA	Association of Heads of Residential Colleges and Halls of Universities of Australia. The precursor Association to AAHCHI.
ARIA	Accessibility/Remoteness Index of Australia.
ASGS	Australian Statistical Geography Standard.
ASRA	Association for Student Residential Accommodation. Based out of the United Kingdom.

Appendix L: Abbreviations and terms

ATN	Australian Technology Network of Universities.
AUSSE	Australasian Survey of Student Engagement. Conducted by ACER.
BURF	Better Universities Renewal Fund (an Australian Government program).
BOOT Scheme	A scheme whereby a commercial entity builds, owns, operates and transfers student accommodation on land owned by a university or sometimes owned by another form of charity (such as a church). The capital to build and provide on-going capital maintenance for the new accommodation is provided by the commercial entity. The right to operate the building transfers from the commercial entity back to the university, usually after a term of between 21 and 40 years. An example of a BOOT scheme is Sydney University Village, operated by Campus Living Villages.
CAPA	Council of Australian Postgraduate Associations.
CDP	Capital Development Pool (an Australian Government program).
CISA	Council of International Students Australia.
CLV	Campus Living Villages.
COAG	Council of Australian Governments.
CUBO	College and University Business Officers, United Kingdom.
DA	Development Approval.
EFTSL	Equivalent Full-Time Student Load.
EIF	Education Investment Fund (an Australian Government program).
ELICOS	English Language Intensive Courses for Overseas Students.
ESOS	*Education Services for Overseas Students (ESOS) Act 2000* (Cth).
External-mode (of attendance)	Unit of study for which the student is enrolled involves special arrangements whereby lesson materials, assignments, etc. are delivered to the student, and any associated attendance at the institution is of an incidental, irregular, special or voluntary nature.
HEIMS	Higher Education Information Management System. Operated by the Australian Government Department of Education and Training.

Appendix L: Abbreviations and terms

HESA	*Higher Education Support Act 2003* (Cth).
Go8	Group of Eight Australia.
Homestay	Homestay accommodation is a room in the house of a family (usually known as the host family). It is a style of accommodation used by many international students, with the objective of, amongst other things, improving English language skills and promoting cultural exchange with the host family.
IAS	Indigenous Advancement Strategy (an Australian Government program that will replace or has replaced ITAS).
IEAA	International Education Association of Australia.
IEAC	International Education Advisory Council. Formed in 2011 to advise the Australian Government on the development of a five year national strategy to support the sustainability and quality of the international
IHWW	International Houses Worldwide, Inc.
IIE	Institute of International Education. Based out of New York, NY, USA.
IRU	Innovative Research Universities.
ITAS	Indigenous Tutorial Assistance Scheme (an Australian Government program).
Internal-mode (of attendance)	Unit of study for which the student is enrolled and is undertaken through attendance at the Higher Education Provider on a regular basis; or Where the student is undertaking a higher degree unit of study for which regular attendance is not required, but attends the Higher Education Provider (HEP) on an agreed schedule for the purposes of supervision and/or instruction.
Long Corridor	Older style collegiate accommodation where large numbers of student bedrooms (typically each of 10 to 14 square metres in size) are situated off a long corridor in the college or hall building and share a communal bathroom (typically with a ratio of about six to eight residents to every shower or toilet) and perhaps some kitchenettes also situated off the same long corridor.
Metro resident	A student whose permanent home address is in the same metropolitan city as the university campus at which he/she is undertaking studies but who elects to live in a residential college or hall or otherwise in a 100+ bed purpose built or operated student accommodation facility.

Appendix L: Abbreviations and terms

Mobile student	A student whose permanent home address is more than 60 km from the university campus at which he/she is undertaking studies or a student whose permanent home address is within 60 km of their campus but who elects to live in a residential college or hall or otherwise in a 100+ bed purpose built or operated student accommodation facility.
MOOC	Massive On-line Open Course.
MOU	Memorandum of Understanding.
Multi-modal	A unit of study is undertaken partially on an internal-mode of attendance and partially on an external-mode of attendance.
NAAUC	National Association of Australian University Colleges.
NCES	USA National Centre for Education Statistics. Based out of Washington, DC, USA.
NRAS	National Rental Affordability Scheme (a program jointly funded by the Australian Government and the States and Territories).
NSSE	USA National Survey of Student Engagement.
NUHEP	Non-University Higher Education Provider.
NUS	National Union of Students.
NZATEAP	New Zealand Association of Tertiary Education Accommodation Professionals.
OECD	Organisation for Economic Co-operation and Development.
Off campus	Not within or directly abutting the external boundary of a university's campus. As of 2 March 2015 the UNSW Kensington campus map could be accessed at: <http://www.facilities.unsw.edu.au/sites/all/files/KENC_Campus_Dec14.pdf>.
On Campus	Within or directly abutting the external boundary of a university campus. As of 2 March 2015 the UQ St Lucia Campus map could be accessed at: <http://www.pf.uq.edu.au/maps/StLucia.pdf>.
Organisation Type	The following abbreviations are used to refer to ownership and management type: • UniMngd – University owned and managed • UniCommMngd – University owned and commercially managed • Comm – Commercial student accommodation provider • Church – Church owned or affiliated • Charitable trust – Charitable trust • Other – Other.

Appendix L: Abbreviations and terms

PBSA	Purpose Built Student Accommodation.
Places	An individual student place or bed in a university residential college or hall of residence or otherwise in a 100+ bed purpose built or operated student accommodation facility for university students. For example, there are two places in a twin share room.
RUN	Regional Universities Network.
Sector	All Australian university colleges, halls of residence and all 100+ beds commercial student accommodation providers.
SCH	Statistical Clearing House within the Australian Bureau of Statistics.
SHA	Student Housing Australia.
Site	A student residence operated by a single provider at a single location or campus.
The Department	The Australian Government Department of Education and Training, International Group.
TLC	Teaching and Learning Capital Fund (an Australian Government program).
TSI	Torres Strait Islander.
UCA	University Colleges Australia.
UA	Universities Australia.
UNESCO	United Nations Educational, Scientific and Cultural Organization, based out of Paris, France.
University College	A University College is a residential institution associated with a university and providing accommodation to university students. They are usually differentiated from other forms of student accommodation by the provision of academic, social and pastoral support to residents.
VET	Vocational Education and Training.

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