University of Maryland, College Park

2011 Student Housing Market Analysis

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TABLE OF CONTENTS

Executive Summary **1**

Overview 1

Summary of Findings 1

Recommendations 4

Introduction **6**

Goals and Objectives 6

Methodology 6

Current Housing Situation **10**

University Housing 10

Stakeholder Viewpoints 11

Student Housing Satisfaction 11

Housing Plans 14

Importance of Providing Housing 15

Transportation 15

Parents **16**

Peer Institution Analysis **23**

Beds to Enrollment 23

2011-12 Cost 24

Occupancy 29

Policies and Amenities 30

Latest Housing News 32

Off-Campus Relationships 33

Graduate and Family Housing 34

Off-Campus Market **37**

Overview 37

Student Views 37

Student-Oriented Properties 38

Conventional Properties 40

Pipeline 41

Cost 42

Where Undergraduate Students Lived 46

Where Graduate Students Lived 48

Dispersion 50

Living Preferences 52

Unit Preferences 52

Amenities 53

Interest 54

Demand Analysis 55

Gap Analysis 60

Overview 60

Undergraduate Student Housing 60

Graduate Student Housing 61

Conclusions 61

ATTACHMENT 1: Focus Group Notes

ATTACHMENT 2: Peer Data

ATTACHMENT 3: Off-Campus Market Data

ATTACHMENT 4: Student Survey Tabulation

ATTACHMENT 5: Student Survey Response Demographics

ATTACHMENT 6: Parent Survey Tabulation

ATTACHMENT 7: Pro Forma

TABLE OF FIGURES

Figure 1: Satisfaction with Current Housing Situation 12
Figure 2: Satisfaction by Housing Situation 13
Figure 3: Reasons Students Remain in On-Campus Housing 13
Figure 4: Certainty of Fall 2011 Housing Situation 14
Figure 5: Housing Plans for Fall 2011 14
Figure 6: Importance of Providing Housing, Student Response 15
Figure 7: Ways Students Get to Class 15
Figure 8: Factors Used by Parents in Deciding Which University to Attend 16
Figure 9: Sources of Funding for Housing Expenses 17
Figure 10: Where Undergraduate Son or Daughter Lives 17
Figure 11: Quality of Housing Relative to Price, All Parents 18
Figure 12: Mean Quality and Expense by Children's Residence 19
Figure 13: Appropriate Housing for Each Year of Study 19
Figure 14: Importance of Providing Housing, Parent Response 20
Figure 15: Important Factors, for Parents, in Choosing Where to Live 20
Figure 16: Parents' Preferred Unit Types 21
Figure 17: Academic Peers, Beds as Percent of Enrollment, Fall 2010 23
Figure 18: Competitor Peers, Beds as Percent of Enrollment, Fall 2010 24
Figure 19: Situational Peers, Beds as Percent of Enrollment, Fall 2010 24
Figure 20 Academic Peers: Double Room Rate in a Traditional Residence Hall, 2011-12 AY 25
Figure 21 Competitor Peers: Double Room Rate in a Traditional Residence Hall, 2011-12 AY 25
Figure 22 Situational Peers: Double Room Rate in a Traditional Residence Hall, 2011-12 AY 26
Figure 23: Double Room Rate in a Two-Bedroom Apartment 27
Figure 24: Single Room Rate in a Two-Bedroom Apartment 27
Figure 25: Academic Peers, Total Cost to Attend 28
Figure 26: Competitor Peers, Total Cost to Attend 28
Figure 27: Situational Peers, Total Cost to Attend 28
Figure 28: Studio Apartment, Per-Unit Monthly Rent 35
Figure 29: One-Bedroom Apartment, Per-Unit Monthly Rent 35
Figure 30: Two-Bedroom Apartment, Per-Unit Monthly Rent 36

TABLE OF FIGURES

Figure 31: Occupancy Trend, April to September, 2011 40
Figure 32: Survey: Single Students – Median Monthly Housing Cost by Unit Type per Person 43
Figure 33: Survey: Married/Family Students - Median Monthly Housing Cost by Unit 43
Figure 34: Market Rents—Individual Lease Properties, per Person 44
Figure 35: Market Rents—Conventional Lease Properties, per Bedroom 44
Figure 36: Lease Terms and Utility Packages 44
Figure 37: Utilities Included in Rent 45
Figure 38: Unit and Community Amenities 45
Figure 39: Location of Rentals 47
Figure 40: Reasons Undergraduate Students Moved Off Campus 47
Figure 41: Factors Motivating Undergraduate College Park House Renters to Move to Apartments 48
Figure 42: Location of Rentals 49
Figure 43: Reasons Graduate Students Moved Off Campus 50
Figure 44: Factors That Would Motivate Grad Student College Park House Renters to Move to Apartments 50
Figure 45: Survey Respondents' ZIP Codes 51
Figure 46: Density Map of Off-Campus Respondents 51
Figure 47: Influential Amenities 53
Figure 48: Interest in Housing on Campus, Fall 2010 54
Figure 49: Reasons for Lack of Interest 54
Figure 50: Survey Respondents by Class Level 69
Figure 51: Age of Survey Respondents 69
Figure 52: Gender of Survey Respondents 70

TABLE OF TABLES

Table 1: Peer Institutions 7

Table 2: Peer Occupancy 29

Table 3: Wait List, Fall 2010 30

Table 4: Housing Policies and Amenities at Peer Institutions 31

Table 5: Units, Beds, and Typical Rents at Student-Oriented Properties 38

Table 6: Comparison of Rental Rates 46

Table 7: Unit Configurations and Tested Rents for On- or Near-Campus Housing 52

Table 8: Unit Configurations and Tested Rents for Off-Campus Housing 52

Table 9: Preferred Unit of Interested Undergrad and Grad Students by Current Residence, May 2011 55

Table 10: Demand by Cohort 56

Table 11: Potential Demand Distributed By Unit Type, Freshman and Upper Class 57

Table 12: Potential Demand by Unit Type, Graduate Hills/Gardens, Other Grad Students, and International ... 58

Table 13: Potential Demand by Unit Preference, Freshman Connection and Transfer Students 59

Table 15: Supply, Demand, and Gap for Undergraduate Housing 61

Table 16: Supply, Demand, and Gap for Graduate Housing 61

EXECUTIVE SUMMARY

OVERVIEW

The University of Maryland (UM) retained the firm of Anderson Strickler, LLC (ASL) to conduct a student housing market analysis as part of a collaborative effort with UM, the City of College Park, and the College Park City-University Partnership (CPCUP). The purpose of the study was to characterize on- and off-campus student housing which is current and pending as well as nearby off-campus housing most utilized by UM's undergraduate and graduate students. The analysis included stakeholder interviews, student focus groups, a peer institution analysis, a student survey, a survey of parents of students, an off-campus market analysis, a demand analysis to identify gaps or shifts, and a single-project financial pro forma. The two major conclusions of the study were that UM (1) conduct a holistic, comprehensive housing plan, using the market analysis as a base in order to ensure the continued long-term viability of the campus housing system, and (2) develop a unit type that combines privacy and relative affordability that is currently provided neither in great numbers by the campus nor in the off-campus market – a single occupancy traditional residence hall room.

SUMMARY OF FINDINGS

CAMPUS HOUSING

- In fall 2010, UM operated about 8,352 beds for undergraduates in 35 campus residence halls and seven apartment buildings. An additional 3,003 beds for undergraduates were available in two public-private partnership (PPP) apartment communities adjacent to campus. Approximately 1,200 undergraduate students lived in fraternity and sorority houses. Also available were 476 units in two graduate/family apartment communities owned by UM and managed by a private company.

- In fall 2011 the opening of Oakland Hall added 709 total new beds. This increase in capacity resulted in the largest number of students in housing in UM's history (11,849 students, including RAs) as well as the largest number of students in living-learning programs (4,119 students.) The waiting list at opening was 298 students. This absorption occurred even in light of continuing expansion in off-campus housing.

- In terms of future plans, a new building will replace three existing halls with an additional hall to be replaced. Whole hall renovations are planned for two halls, with eight halls slated to receive system improvements.

STAKEHOLDER INTERVIEWS

- While concerns vary for each department or by each individual, common themes emerged during interviews, such as the cost of housing and the aging high-rise traditional residence halls. A serious concern was how long can UM stay competitive with peer institutions while requiring most residential students to live in traditional housing with community bathrooms.

- Graduate students have a difficult time finding affordable housing; most stipends are not high enough to cover living expenses. Stakeholders are concerned that UM cannot guarantee housing to transfer students owing to the lack of bed spaces.

- The City is concerned about the number of students renting group houses in residential areas and affecting the character of the neighborhoods. There are few amenities along Route 1 near campus and redevelopment of College Park should be a priority. It is not a "college town" like so many other university towns.

CURRENT HOUSING SITUATION

- On-campus residents indicated in focus groups that they like the proximity to classes, dining, and campus resources. They appreciated the social aspects of community living and amenities in certain buildings, e.g., air conditioning, private bedroom, elevator. Survey respondents agreed and selected proximity to classes and the ease with which they can be involved in campus activities as reasons for continuing to live on campus. Another often-cited reason was the safety and security of UM housing. Overall, 74% of on-campus residents were either "very satisfied" or "satisfied" with their housing vs. 63% of off-campus residents.

- Off-campus survey respondents who previously lived on campus or in University-affiliated housing selected all of the reasons why they moved off campus from a list provided. The top two reasons the students moved off campus were to find lower housing costs and more living space. Other top reasons were preference for a full kitchen in the unit, more privacy, more independence, and a private bedroom.

- Students believed it is important for the University to provide housing to various student groups, regardless of housing choices they personally have made. Over 90% of survey respondents indicated that it was extremely important for the University to provide housing for freshmen. When "extremely important" and "somewhat important" responses are combined, over 90% of survey respondents believed that it is important to provide housing to sophomores, transfer students, and international students. The same combined response for graduate students yielded a total of 39% of respondents.

PARENTS

- The three main college selection factors for parent respondents to the survey were the overall reputation of a university, the reputation of its academic programs, and the quality of the academic experience. The availability of housing was more important than the quality of housing and living/learning programs were more important to this group than the quality of housing.

- As of mid-September, 41% of all parent survey respondents stated that their child was having an extremely positive housing experience, 46% reported a somewhat positive experience, and 9% reported a less than positive experience.

- The largest percentage of parent survey respondents (37%) believed they were getting a moderate value and paying a moderate price for the on- or off-campus housing in which their student lived. However a number of parents believed that their student is getting moderate quality housing for a high price (20%). In comments on the parent survey, parents were strongly in support of facilities upgrades, particularly adding air-conditioning in halls that currently lack this feature.

PEER INSTITUTION ANALYSIS

- In fall 2010, UM had the capacity to house 31% of enrollment in on-campus or UM-affiliated housing, which is above the 28% median for academic and competitor peers, but below the 36% at situational peers. The addition of Oakland Hall in fall 2011 brought UM's capacity to 33%.
- All peers experienced high occupancy rates in fall 2010 and fall 2011. The lowest was the University of Delaware at 94% in fall 2010 and University of North Carolina-Chapel Hill in fall 2011 at 96%. UM has historically exceeded 100% and maintained a waitlist for housing. As a result of their high occupancy and demand, the majority of UM's peers are in the process of building new housing or renovating existing housing.
- UM charges the same rate for all students assigned to a double or a single room in traditional residence halls, semi-suites, and suites. No other peer has this policy; however, two institutions have a similar policy where all freshmen, regardless of room type, pay the same housing rate. UM's rate of $5,793 is close to the competitor peer group average of $5,529. The total cost to attend UM (including tuition, fees, room, and board) for an in-state student is just below the median for all three peer groups.

OFF-CAMPUS MARKET

- In College Park, since 2006, over 5,000 new student beds have entered the market both on and off campus. Much of this growth has taken place in new, high-end, individual-lease properties near the University and serving only college students. By ASL's estimation based on fall 2011 research, the five individual-lease properties close to campus[1] with almost 4,400 beds have over 630 vacancies, the equivalent of a 14% vacancy rate. Although almost 1,300 of these beds came online in fall 2011, current market conditions have not tempered developers' optimism as to future market performance. The pipeline of new projects has about 2,000 more new beds in projects aimed at the student market in addition to 555 new units in two other complexes. These figures do not include any housing that may be developed on the East Campus site.
- Two-thirds of undergraduate and graduate survey respondents leased an apartment, 18% rented a group house, 15% rented a room in a private home, and 1% had other housing arrangements. 21% did not share a bathroom with other residents; over half (58%) shared a bathroom at most with one other, while 21% shared a bathroom with more than two people. The majority of renters had a twelve-month lease (76%). The largest single group of undergraduate renters lived in College Park outside of the downtown area (36%) followed by Downtown College Park (21%.) The largest single group of graduate student renters lived in areas not in or near College Park (41% cited "other") followed by College Park outside of the downtown area (26%.)
- For single undergraduate survey respondents that rented housing on their own and did not share a bedroom, the total median monthly cost of housing (including rent and other costs) ranged from $609 month, per person for units with three bedrooms to $868 per month, per person for four-bedroom units. For single graduate survey respondents that rented housing on their own and did not share a bed-

[1] The Enclave at 8700, Mazza GrandMarc, Towers at University Town Center, University View, and The Varsity.

room, the total median monthly cost of housing ranged from $553 month, per person for units with three bedrooms to $1,295 per month, per person for an efficiency unit.

DEMAND ANALYSIS FOR ON-CAMPUS HOUSING

- Undergraduate and graduate survey respondents were asked to consider how influential certain amenities would be on their decision to live in on-campus housing. Providing wireless internet throughout the building, on-site laundry facilities, card access on exterior doors, security cameras, and quiet study areas were the top five amenities that students "would not live without" or would have a positive influence on their decision to live there.
- The demand for student housing was determined using results from the student survey and enrollment figures provided by UM for the six targeted cohorts (1) first-year undergraduate students, (2) upper-class undergraduate students, (3) full-time transfer students, (4) Freshmen Connection students, (5) full-time graduate students, and (6) undergraduate and graduate international students. As the cohorts are not mutually exclusive, adding together the demand from all six of the individual cohorts would overstate overall demand.
- Demand was exhibited by all of the cohorts. Demand from upper-class students was the highest, followed by transfer students, and graduate students. With the exception of freshmen and Freshman Connection students, off-campus housing was generally preferred. For demand for on-campus housing, apartments were preferred. For off-campus graduate students, international students and transfer students, an on-campus traditional single also was relatively popular.

GAP ANALYSIS

- ASL assessed how well the supply of existing housing meets the demands of students. The gap analysis concludes UM has a surplus of over 2,000 traditional beds on campus and deficits of 533 semi-suite beds, 387 suite-style beds, and 3,853 apartment beds, compared to the first-choice preferences of those who would live on campus. Overall, UM has unmet demand for 3,433 beds.
- A similar analysis for graduate housing concludes that UM has a gap of 684 beds of unmet demand for on-campus housing. Much of this demand is for traditional units, but there is still about 200 beds of unmet demand for apartment-style units on campus. The survey defined on-campus housing as "University housing on or near campus" and off-campus options as "off campus/privately-owned and managed housing." Over a thousand off-campus graduate students would be interested in either single-student or conventional apartments off campus.

RECOMMENDATIONS

In light of a rapidly changing off-campus market, aging facilities, and peers that are taking action to improve their housing stock, ASL recommends that UM undertake a comprehensive housing planning exercise. Although plans are in place to address facility needs for many of the residence halls, a comprehensive plan, with the market study as a base, has the following benefits:

- Interprets and facilitates the academic mission of the University
- Requires an all-inclusive, strategic vision of the student housing system
- Can take town/gown issues into account during planning

- Considers both renewal and sustainability of a significant portion of the institution's assets
- Addresses new construction, renovation, reconfiguration, and conversions
- Assures the proper allocation of resources
- Enables leveraging the time value of money to build rents and reserves
- Can test the financial impact of a variable rate structure
- Allows projects to cross-subsidize each other
- Uses long-term financing for leveraging cash flow and maximizing capital improvements
- Provides a framework for individual project plans and annual renewal projects
- Provides a view from "25,000 feet"

On a more short-term basis, perhaps even as part of the planning of Prince Frederick Hall (the building planned to replace three smaller, older residence halls), increase the number of single-occupancy traditional rooms into UM's unit mix. The benefits of such of an increase are:

- Provides a product currently provided in a very small number on campus (332) and not provided off campus
- Combines bedroom privacy with a relatively affordable cost
- Addresses preferences of currently under-served groups: upper class students, transfer students, graduate students, and international students
- Helps to potentially pull students that move off-campus for private bedrooms to choose to continue living on campus
- Allows for students to enjoy both bedroom privacy and a more communal setting than provided in much of the off-campus housing stock
- Eases room assignments, reducing concerns with roommate matching, gender, age, or other criteria

INTRODUCTION

GOALS AND OBJECTIVES

The goal of the 2011 Student Housing Market Analysis, a collaborative effort with the University of Maryland (UM), the City of College Park, and the College Park City-University Partnership (CPCUP), was to characterize on- and off-campus student housing which is current and pending as well as nearby off-campus housing most utilized by UM's undergraduate and graduate students. UM administrators wanted to know where gaps or shifts in student demand for various housing options were occurring and is expected over the next 10 years. Our recommendations include UM's optimal response to housing market gaps and shifts including number of units/beds of student housing that UM should maintain, housing types (e.g., suites and traditional rooms), lease timeframes, price points, furnishing options, proximity and access to campus resources for multiple student constituencies. We have presented a planning scenario warranted by factors such as enrollment projections and future construction. A financial model accompanies this recommendation.

METHODOLOGY

PROJECT INITIATION

The ASL team conducted a kick-off meeting on March 11, 2011, toured existing on-campus housing as well as off-campus housing near the University and in College Park, and requested background materials for review. A steering committee was formed comprised of UM staff and City of College Park/CPCUP representatives.

In attendance at the kick-off meeting:

Linda Anderson, Anderson Strickler, LLC
Ellen Ulf, Anderson Strickler, LLC
Mary Hummel, Assistant Vice President for Student Affairs, University of Maryland
Maria Lonsbury, Project Specialist, Office of the Vice President for Student Affairs, University of Maryland
Jon Dooley, Director, Department of Residential Facilities, University of Maryland
Deb Grandner, Director, Department of Resident Life, University of Maryland
Dennis Passarella-George, Assistant Director, Department of Resident Life, University of Maryland
Scott Young, Assistant Director, Department of Resident Life, University of Maryland
Joann Prosser, Director of Research, Department of Resident Life, University of Maryland
Terry Schum, Planning Director, City of College Park

The CPCUP representative was unable to attend the kick-off meeting.

STAKEHOLDER INTERVIEWS

ASL held individual and group interviews with key stakeholders at the University and met with City officials. Representatives from Student Affairs, Academic Affairs, Resident Life, Residential Facilities, Residence Hall Association (RHA)/Student Government Association (SGA), Graduate Student Government Executive Committee, Living/Learning Faculty, Undergraduate Studies, Department of Transportation Services, Department of Dining Services, the State of Maryland, City of College Park, and CPCUP were included.

FOCUS GROUPS

Seven focus groups were held during the spring 2011 semester. A total of 90 students participated and each participant was given a $30 VISA gift card as a thank-you gift. Participants were divided by various student groups:

1) first-year students, 2) "Freshmen Connection" students (a fall semester academic program open to students who have already confirmed their spring admission), 3) upper-class students (sophomores, juniors, and seniors), 4) graduate students, 5) international students, 6) transfer students, and 7) students living off-campus. Using a moderator's guide ASL developed with input from the steering committee, the moderator asked each group about their current housing situation, advantages and disadvantages to living on or off campus, preferred unit types and amenities, and budget limitations. Results were used to gauge students' desire for on-and off-campus housing and to craft survey questions.

PEER AND COMPETITOR INSTITUTION ANALYSIS

UM supplied ASL with a list of 15 peer institutions divided by type: academic, competitor, and situational. Academic peers are those institutions identified by UM as being overall aspirational peers. UM has held these five institutions as aspirational peers for many years: The University of North Carolina, Chapel Hill; University of Illinois, Urbana-Champaign; University of Michigan; University of California, Berkeley; and University of California, Los Angeles.

Competitor peers are those institutions identified by UM's Office of Undergraduate Admissions in 2011 as those institutions with which UM competes for students. They are: The Pennsylvania State University; University of Virginia; University of Maryland, Baltimore County; Cornell University; and Virginia Polytechnic Institute and State University.

Situational peers are those institutions identified by the steering committee for the purpose of this study. These institutions were selected because they share similar geographical and environmental characteristics as UM in College Park within a metropolitan area: University of Delaware; Rutgers, The State University of New Jersey; The Ohio State University; North Carolina State University; and Stony Brook University. The following list includes abbreviations are used in this report.

ACADEMIC	
The University of North Carolina, Chapel Hill	UNC-CH
University of Illinois, Urbana-Champaign	UIUC
University of Michigan	MICH
University of California, Berkeley	BERK
University of California, Los Angeles	UCLA
COMPETITOR	
The Pennsylvania State University	PSU
University of Virginia	UVA
The University of Maryland, Baltimore County	UMBC
Cornell University	CORN
Virginia Polytechnic Institute and State University	VTECH
SITUATIONAL	
University of Delaware	UDEL
Rutgers, The State University of New Jersey	RUTG
The Ohio State University	OSU
North Carolina State University	NCSU
Stony Brook University	SBU

Table 1: Peer Institutions

ASL contacted each campus in August/September, 2011 to collect information regarding housing options, room rates, policies, amenities, trends, new housing plans, and off-campus housing offerings and challenges. Additional information was obtained from www.collegeboard.com.

OFF-CAMPUS STUDENT HOUSING MARKET ANALYSIS

Using input from focus groups, the student survey, a University administrator, and ASL's research from a previous study, ASL compiled a list of apartment complexes within 3.7 miles of the University. ASL interviewed property managers and owners to determine unit types, marketing efforts, rents, occupancy, wait lists, leasing policies, parking, and amenities. Information was also retrieved from the Internet. Off-campus data are in Attachment 3. In addition, ASL studied the Route 1 Overlay Zone, interviewed real estate professionals, and interviewed representatives from the City of College Park planning and development office to determine housing trends and identify planned competitive housing projects.

STUDENT SURVEY

ASL designed a student survey with input from the steering committee, campus administrators, and students. The purpose of the survey was to collect students' demographic information, information on students' current housing situation, and information on desired unit types at estimated rents. The Web survey was posted from April 26 through May 6, 2011. To notify students, UM sent an initial invitation soliciting participation using an electronic mail message from the Office of the Vice President for Student Affairs. Two reminder messages were sent before the submission deadline. The survey was designed to collect data on the following student populations: 1) first-year undergraduate students, 2) upper-class undergraduate students (sophomores, juniors, and seniors), 3) full-time transfer students, 4) Freshmen Connection students, 5) full-time graduate students, and 6) undergraduate and graduate international students. Incentives were offered to encourage students to participate including $10 Terrapin Express credits to the first fifty responses, VISA gift cards to 15 randomly-selected students in the amounts of $30, $50, and $100. With 2,842 responses from a distribution of 11,396, the survey achieved a 24.94% response rate[2].

PARENT SURVEY

ASL designed a survey with input from the steering committee. The purpose of the survey was to quantify student housing opinions of parents of undergraduate students who are often responsible for housing decisions and financial support. The survey gathered information regarding satisfaction with students' current living situation, price sensitivity for housing, influence on a student's housing selection, living group size, and location. The survey also tested demand for various unit configurations at given rents and lease terms. The Web survey was posted from September 12 through September 19, 2011 and achieved a 17% response rate. To notify parents, UM sent an electronic mail invitation from the Office of the Vice President of Student Affairs to parents in the Parents Association database. Parents of freshmen students are most highly represented (39%) while parents of senior level students (14%) are not so well represented in the survey database. The survey did not offer parents an incentive to respond to the survey.

[2] Of the 2,842 respondents 51% lived on campus and in university-affiliated housing and 49% lived off campus.

DEMAND ANALYSIS

The demand for student housing was determined using results from the student survey. The four-step process also uses enrollment figures provided by UM, as described below.

Step 1: Capture Rate

Calculate the capture rate for each cohort subdivision at each level of interest by dividing the number of survey respondents in that cohort subdivision with that level of interest by the number of responses from that cohort subdivision, as in the following example:

$$\frac{\text{Number of Off-Campus Upper Class Respondents “Definitely Interested” in Campus Housing}}{\text{Number of Off-Campus Upper Class Students Responding to Survey}}$$

Step 2: Potential Interest

Multiply the capture rate for each cohort subdivision by the number of enrolled students in the respective cohort subdivision to determine potential interest at each level.

Step 3: Combine Definite and 50/50 Interest

Since respondents at the second level of interest said they “might have lived there (50/50 chance),” the analysis discounts their interest by 50% before adding it to definite interest. Since converting potential interest in housing to actual demand is a difficult undertaking depending on many factors, we assume that there is no demand from those who indicated that they would not, or probably would not, live in the housing options.

Step 4: Demand

Apply the combined rate of interest for each cohort subdivision to fall 2010 enrollment (provided by UM) to calculate potential demand from that cohort. Fall 2010 data was used as the survey was conducted in the spring of 2011. The demand is “potential” because it is not “actual” demand, where students actually live.

FINANCIAL MODEL

ASL created a financial pro forma based on the program recommendation resulting from the market analysis. The pro forma details assumptions regarding operating costs, the development budget, and financing.

CURRENT HOUSING SITUATION

UNIVERSITY HOUSING

The University of Maryland, College Park (UM) enrolls approximately 37,600 full-time and part-time students at the undergraduate, Master's and Ph.D. levels, including about 24,700 full-time undergraduate students and 7,570 full-time Master's and doctoral students.

The University guarantees residence hall housing to all new freshmen entering each fall. In fall 2010, UM operated about 8,352 beds for undergraduates in 35 campus residence halls and seven apartment buildings. An additional 3,003 beds for undergraduates were available in two public-private partnership (PPP) apartment communities adjacent to campus (i.e., South Campus Commons or The Courtyards at Maryland). Approximately 1,200 undergraduate students lived in fraternity and sorority houses, two-thirds of them in houses owned by the University, the others in chapter-owned houses located at the campus edge in the City of College Park. An estimated 650 graduate students, some with family members, lived in 476 units in two graduate apartment communities owned by UM and managed by a private company. Efficiency, one-bedroom, and two-bedroom units were available; efficiency units had a long waiting list.

In fall 2011 the opening of Oakland Hall, a residence hall designed as two-double-bedroom semi-suites, added 709 total beds while renovations to other halls caused the net increase to be 684 beds. This increase in capacity resulted in UM housing the largest number of students in housing in its history (11,849 students) as well as the largest number of students in living-learning programs (4,119 students.) The waiting list at opening was 298 students. These increases occurred even in light of a rapid expansion in off-campus housing including 1,270 beds as of fall 2011 (901 beds at the Varsity and 369 at the Enclave at 8700.)

UM's 2008 strategic plan addressed the institution's unmet housing needs for students, faculty, staff, visiting lecturers, and researchers. The strategic plan includes an increase in University housing and upgrades in existing housing facilities as part of efforts to enroll "more of Maryland's and the world's exceptional high school graduates" and college graduates, increase enrollments by the most talented transfer students, further increase retention and graduation rates by all undergraduates, and make available high-quality, affordable housing near campus for all full-time graduate students (who want to live nearby), with priority for new Ph.D. students," in part through development of retail, office and housing parcels at its planned East Campus site.

The University's Department of Residential Facilities maintains a listing of new housing construction projects, whole hall renovations, and other capital projects as currently shown in the campus' System Funded Construction Program for the next ten years. The most recent version of that document identifies a new building called "Prince Frederick" to replace Carroll, Caroline, and Wicomico Halls. Worcester Hall, an approximately 155 bed residence hall, is also slated to be replaced with 233 beds. Whole hall renovations are planned for two halls, Cecil and Dorchester halls. Eight halls are slated to receive improvements for air conditioning, electrical systems, and windows: Elkton, Cambridge, Centreville, Bel Air, Chestertown, Cumberland, Hagerstown, Ellicott, and LaPlata halls.

STAKEHOLDER VIEWPOINTS

Stakeholder interviews were held with various administrators. The following summary from stakeholder interviews reflects the opinions of certain individuals. The opinions point to the issues that were considered when developing the student and parent survey. While concerns varied for each department or individual, common themes emerged during interviews, such as the cost of housing and the aging high-rise traditional residence halls. A serious concern was how long can UM stay competitive with peer institutions while providing traditional housing with community bathrooms. Additionally, triple and quad rooms may have an adverse effect on students' GPA, the meal plan requirement may impact students' decisions to move off campus, and some students want to stay in housing over breaks. While the opening of Oakland Hall will address some of these issues with new, double-bedroom semi-suites, stakeholders understood the need to consider the entire housing stock.

Undergraduate students had concerns regarding what they consider to be an ambiguous lottery process, flex housing (e.g., using doubles as triples, using lounge spaces), increasing enrollment and the availability of housing, and believe that juniors and seniors do not want to live on North Campus. While Oakland Hall seems to be an optimal design choice, students may want more housing with nine and twelve-month lease options in styles such as available in PPP housing.

The inventory of graduate student housing is small compared to other universities. Graduate students have a difficult time finding affordable housing; most stipends are not high enough to cover living expenses.

Providing living/learning communities with appropriate meeting spaces continues to be a priority. Stakeholders were concerned that UM cannot guarantee housing to transfer students due to lack of supply.

The City representatives were concerned about the high number of students renting group houses in residential areas. There are few amenities along Route 1 and redevelopment of College Park should be a priority. It is not a "college town" like so many other university towns. There is need for faculty and staff housing. There are transportation problems with an excessive number of buses running in College Park, few bike paths, and an excess of cars.

Throughout the interviews, questions emerged regarding the number of student housing units needed on campus and off campus, whether dining and transportation services can meet additional demand, and how the influx of off-campus apartments will affect UM's occupancy. Some of these questions, as well as stakeholders' concerns are addressed in the study.

STUDENT HOUSING SATISFACTION

Students who lived on campus indicated in focus groups that they liked the proximity to classes, dining, and campus resources. They appreciated the social aspects of community living and amenities in certain buildings, e.g., air conditioning, private bedroom, elevator. Freshmen, in particular, felt that living on campus is a good experience for their first year because they get acclimated to college life and meet new people in their residence hall. Students are able to easily work together on homework and group projects and do not have to carry much throughout the day because they can return to their room periodically.

Whether they lived on or off campus or in Graduate Hills/Gardens, most survey respondents are satisfied or very satisfied with their current living situation. In ASL's experience, off-campus residents are typically twice as "very satisfied" as on-campus residents; however, at UM, the "very satisfied" percentages are fairly equal between on and off-campus residents. The percentage of "very satisfied" students is highest with on-campus residents and

lowest at Graduate Hills or Gardens. In addition, when "very satisfied" and "satisfied" are added together, ASL has found on- and off-campus groups to be more equal. In UM's case, 76% of on-campus respondents noted this combined level of satisfaction vs. 63% off-campus respondents as shown in Figure 1.

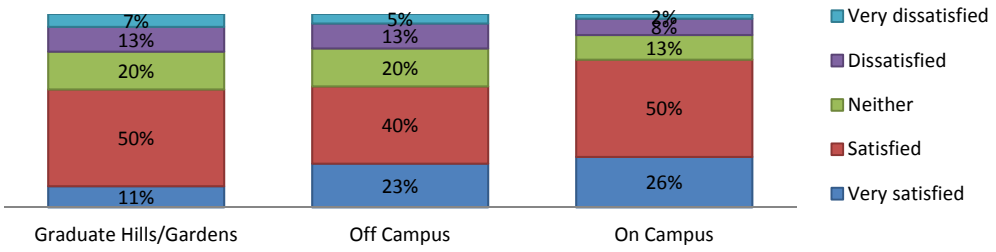

Figure 1: Satisfaction with Current Housing Situation

Figure 2 shows housing satisfaction by living situation. When off-campus survey responses are sorted by place of residence, those that own their own home selected "very satisfied" most often; those renting on their own are more satisfied than those living with parents or other relatives.

Students living in University-affiliated housing show a high level of satisfaction for fraternity/sorority and PPP housing. Over 60% of Graduate Gardens and Graduate Hills residents show satisfaction, although 20% showed dissatisfaction.

Renters who live in houses in College Park have higher levels of satisfaction than do residents of the three individual lease properties (Mazza GrandMarc, Towers at University Town Center, and University View I & II), or those who rent elsewhere.

When "very satisfied" and "satisfied" are added together, most students living on campus are satisfied except for nearly 20% living in Denton Community which includes Denton, Easton, and Elkton Halls.[3]

[3] Denton Community also includes Oakland Hall which opened in fall 2011 and was not included in this survey.

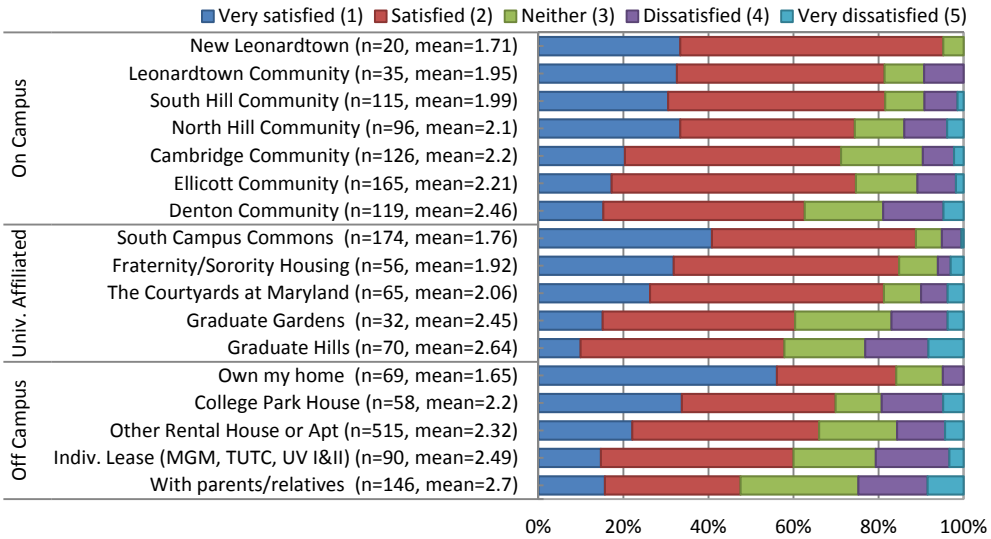

Figure 2: Satisfaction by Housing Situation

All students who responded to the student survey could add comments in a text box at the end of the survey. Respondents echoed several themes. As one said, "Everyone needs a cheap and good room." Many comments focused on the quality and affordability of housing on campus, and the difficulties students who want to live on campus face. Many comments reflected negative opinions of halls without air conditioning, for example. Also, it is not easy for students to succeed in getting housing they prefer in the lottery process, leaving many dissatisfied. As one said, "You should make it easier for upperclassmen to get housing on campus." Some expressed limitations on their desire to live on campus, however, not wanting to sacrifice privacy or expense to live there: "Want to live on campus but my privacy is important. Also, do not know how I would afford it." A number of graduate students indicated interest in living on campus if only a product were available that met their needs and described a variety unit type ideals.

Those living on campus were asked why they choose to remain in on-campus housing. Most appreciated proximity to classes and the ease with which they can be involved in campus life. Other often-cited reasons included on-site programs and activities, and the safety and security of UM housing. The top ten reasons are shown in Figure 3.

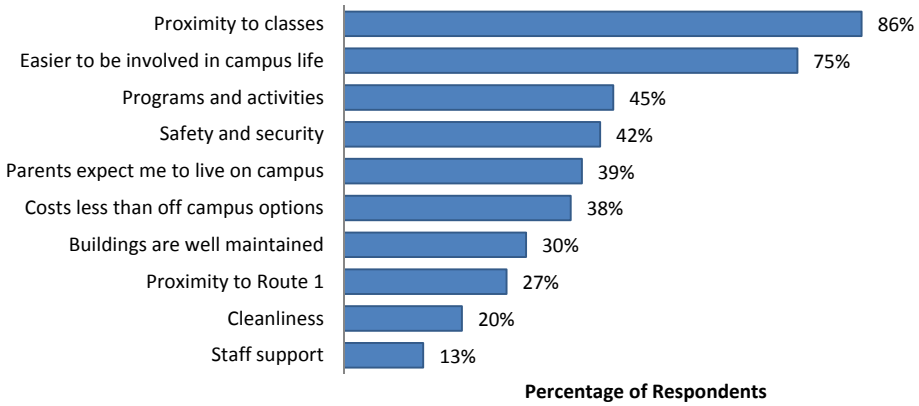

Figure 3: Reasons Students Remain in On-Campus Housing

HOUSING PLANS

Since students were surveyed in early May, 2011, the University was interested in knowing how many students were sure of their fall 2011 housing plans at that point in time. For those living on campus, 75% of on-campus respondents knew exactly where they were going to live compared with 49% of off-campus respondents and 41% of Graduate Hills and Graduate Gardens residents, as shown in Figure 4.

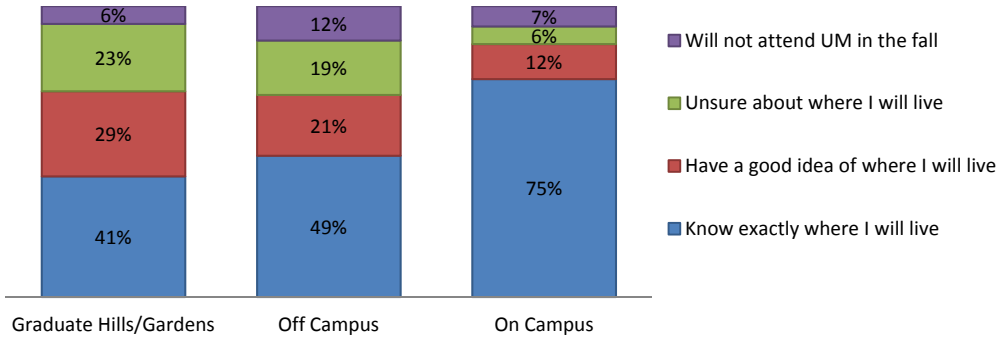

Figure 4: Certainty of Fall 2011 Housing Situation

Those that were sure, or had a reasonable idea, of where they were going to live indicated where their fall 2011 housing was located. At that point in time (early May), half were planning on living in University housing and half were planning on living off campus, as shown in Figure 5 which includes a more detailed breakdown as to where they might live. Of those planning to live off campus, 68% had considered living in on-campus housing.

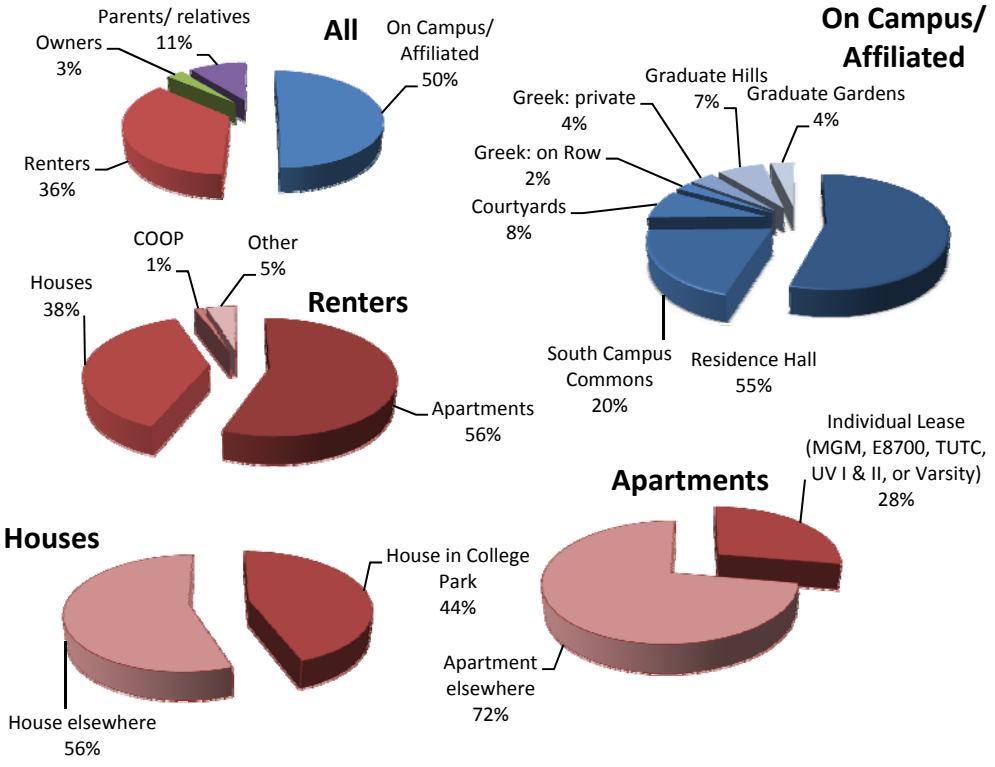

Figure 5: Housing Plans for Fall 2011

IMPORTANCE OF PROVIDING HOUSING

Both undergraduate and graduate students believed it is important for the University to provide housing to various student groups, regardless of housing choices they personally have made. Over 90% of survey respondents indicated that it was extremely important for the University to provide housing for freshmen, as shown in Figure 6. When "extremely important" and "somewhat important" responses are combined, over 90% of survey respondents believe that it is important to provide housing to sophomores, transfer students, and international students. The same combined response for graduate students yielded a total of 39% of respondents.

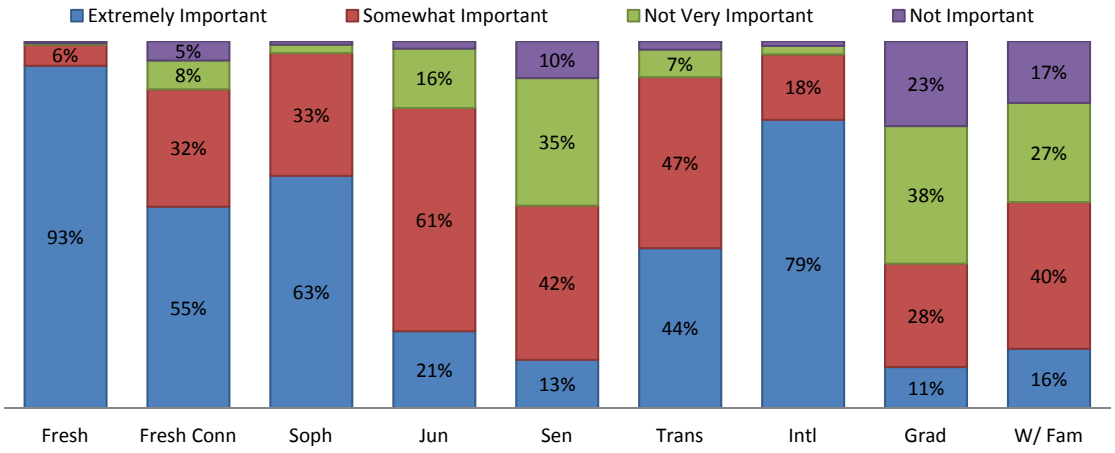

Figure 6: Importance of Providing Housing, Student Response

TRANSPORTATION

All survey respondents were asked to identify their primary method for getting to class. Few carpooled, took Metrorail, or took a public bus. Over four-fifths of students who lived on campus chose to walk (82%) while nearly half of those living further away off campus chose to drive (48% in their own car, 7% in the family car.) Of those who lived in rental houses in College Park, about a third (31%) walked to campus and a third (31%) drove their own car. Just over half (53%) residents of the individual lease properties took a shuttle, although over a third (36%) walked.

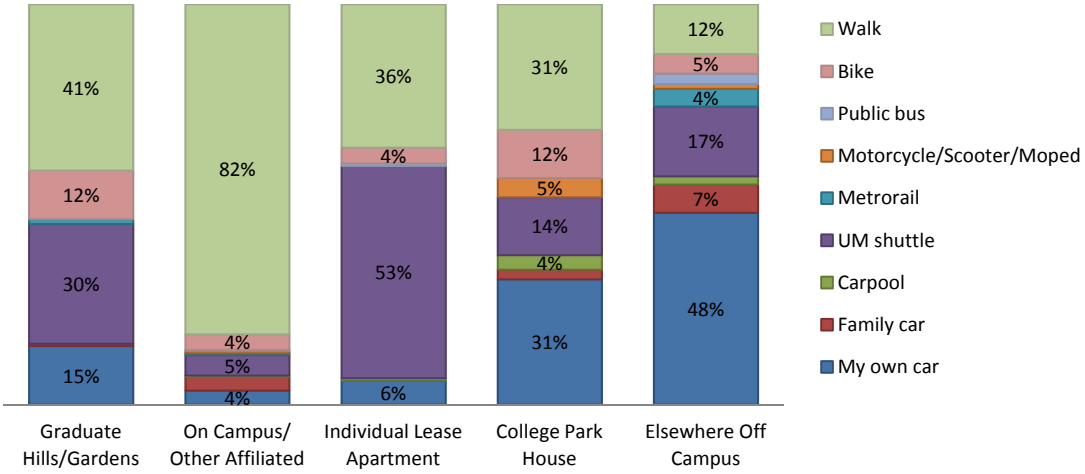

Figure 7: Ways Students Get to Class

PARENTS

The survey sent to members of the Maryland Parents Association received responses from a distribution of parents. Parents of freshmen were strongly represented, with 39% of the response, with 25% parents of sophomores, 21% parents of juniors, and 14% parents of seniors. Virtually all children attended full time, and only 6% were in the Freshman Connection program. From the parent survey, we learned that the overall reputation of a university, the reputation of its academic programs, and the quality of the academic experience were the three main factors that parents considered when deciding where their child would attend. The availability of housing was more important than the quality of housing. Interestingly, living/learning programs were more important to this group than the quality of housing. Figure 8 illustrates the ranking of all factors.

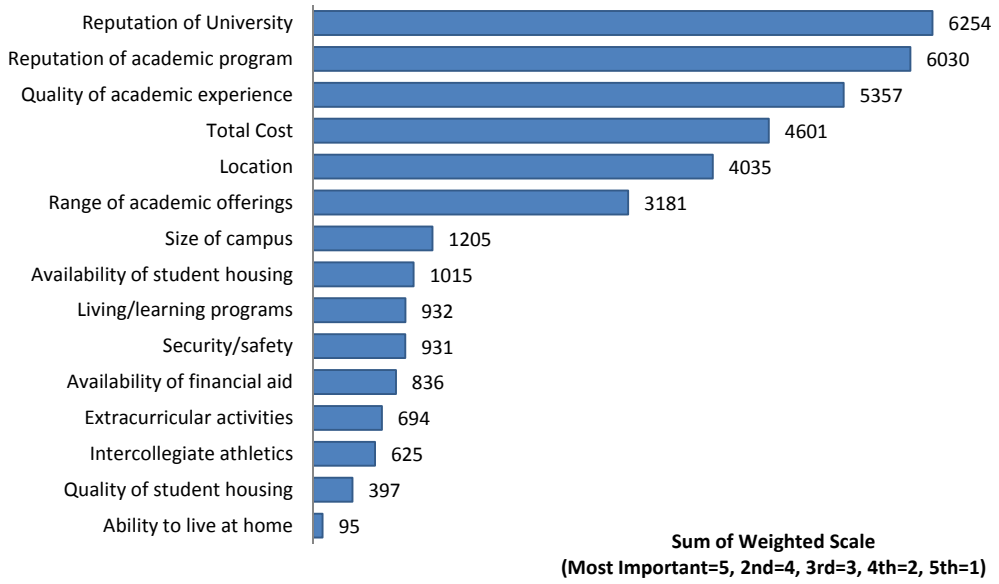

Figure 8: Factors Used by Parents in Deciding Which University to Attend

Well over half of parent survey respondents will pay 100% of students' housing costs for the 2011-12 academic year, while 23% expected the student to pay at least some expenses. Two percent expected students to pay 100% of their living expenses. All sources are shown in Figure 9.

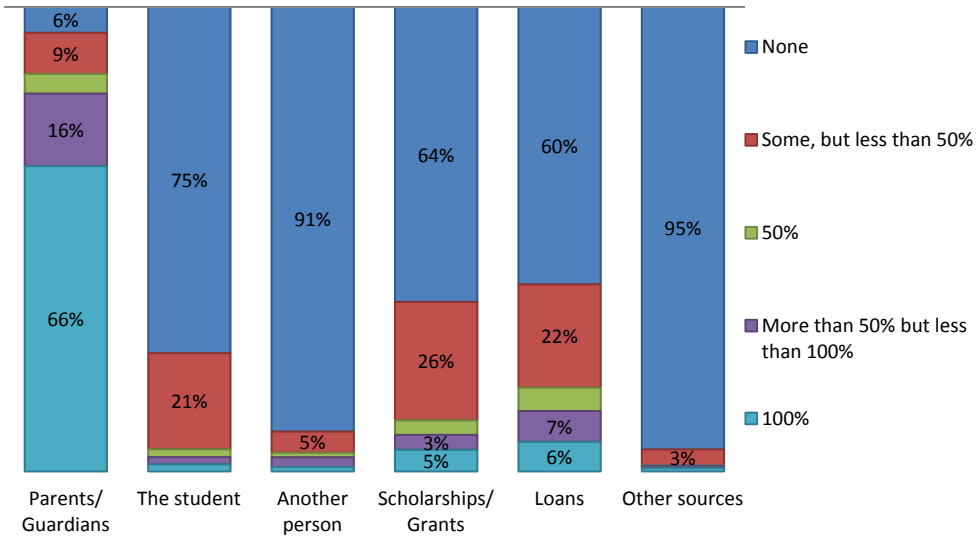

Figure 9: Sources of Funding for Housing Expenses

When asked about the quality of student housing at UM, 56% of parent survey respondents said that the on-campus housing at UM was comparable to housing at other campuses. Nearly one quarter, 24%, thought UM housing was worse than at other campuses, 8% thought it was better, and 12% did not know.

The survey, administered at the start of the 2011-12 academic year, asked parents where their child lived. As shown in Figure 10, over half lived in on-campus housing. An insignificant number of respondents reported their son or daughter living in a co-op or UM graduate housing.

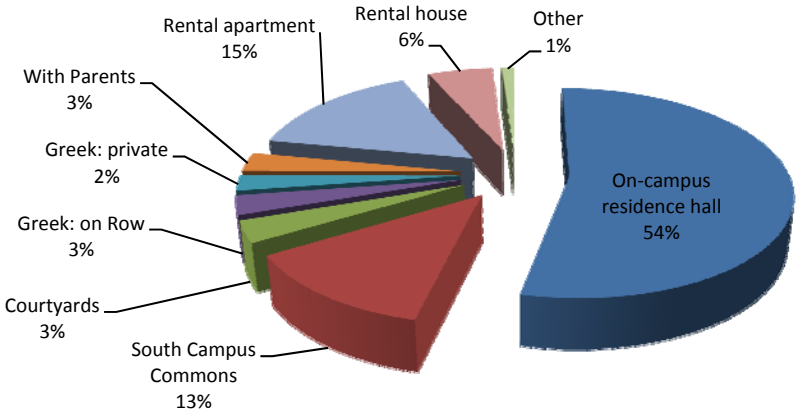

Figure 10: Where Undergraduate Son or Daughter Lives

As of mid-September, 41% of all parent survey respondents stated that their child was having an extremely positive housing experience, 46% were having a somewhat positive experience, 9% a less than positive experience and 2% of parents said their child's living experience is not at all positive.

Children of 517 respondents rented off-campus apartments, houses or co-ops; of these more chose to live at University View (28%) than at any other property. About 26% rented group houses, 17% rented at The Varsity, and

6% rented "Knox Boxes." No other property had more than 5% of respondents. About 23% of parents did not know, or did not indicate, where their child was living.

The location of the student rental varied, but 58% lived in College Park (but not in the downtown area), 16% in the Knox Box area, 11% in downtown College Park (east of Route 1), 2% in Greenbelt/Berwyn Heights, and 1% in Riverdale/Hyattsville. The remaining 9% were sites scattered throughout the area and included other Maryland locations such as Rockville, Adelphi, and Baltimore; one reported Alexandria, Virginia as his/her child's rental location. This does not mean that this 9% would be the only group interested in any new building in College Park or at UM. Another 3% did not know the location.

Parents reported that the monthly median costs paid for their child's off-campus housing was $795 for rent, $50 for utilities, $25 for telephone, cable, and Internet, and $60 for parking for a median total of $850 per month.

Most survey respondents (37%) believed they were getting a moderate value and paying a moderate price for the housing (both on- and off-campus together.) However many parents (20%) believed that their student is getting moderate quality housing for a high price. Figure 11 shows how all respondents answered.

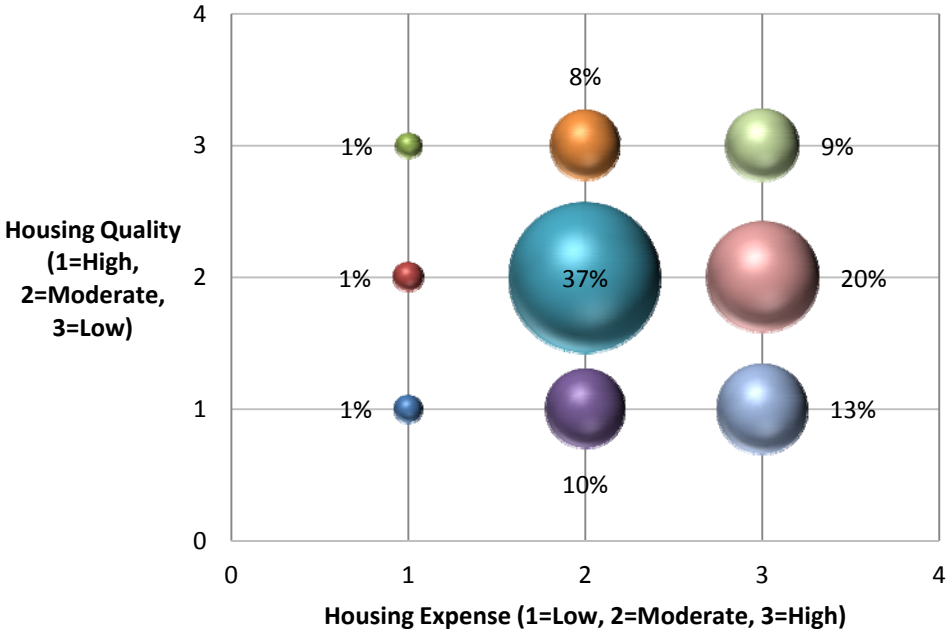

Figure 11: Quality of Housing Relative to Price, All Parents

Opinions on the quality and expense of housing depended on where parents' children lived. As Figure 12 shows, parents' opinion varied widely; individual lease properties were ranked highest in expense, but also in quality. Residence halls were judged to have the lowest expense, and houses in College Park, the lowest quality.

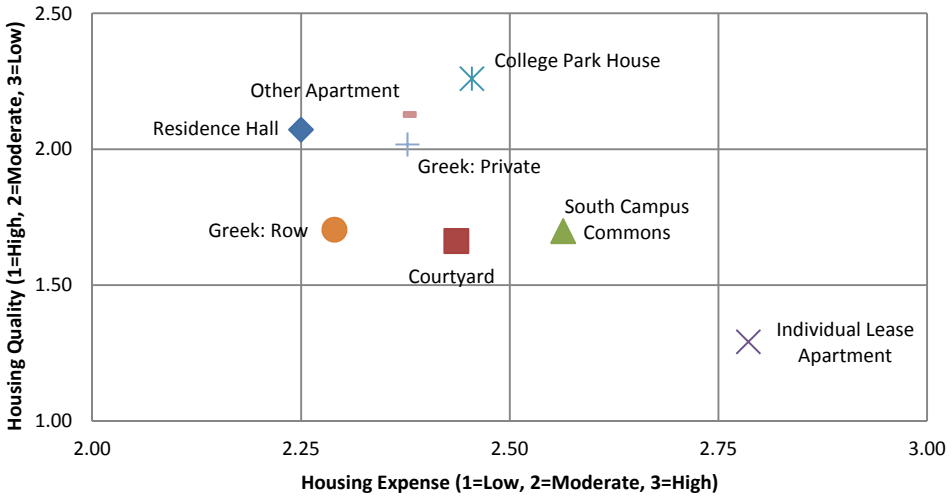

Figure 12: Mean Quality and Expense by Children's Residence

Students experience different housing needs over the course of their college tenure. Parents were asked what living situation was most appropriate for each year of study. For freshmen, three-quarters of the parents agreed that a traditional residence hall was most appropriate. Most parents were divided on appropriate housing for sophomores: 24% in traditional residence hall, 33% in semi-suite, and 27% in suite-style housing. Apartments and suites were favored by most respondents for junior-year housing and over 60% believed that apartments are most appropriate for seniors and graduate students, as shown in Figure 13.

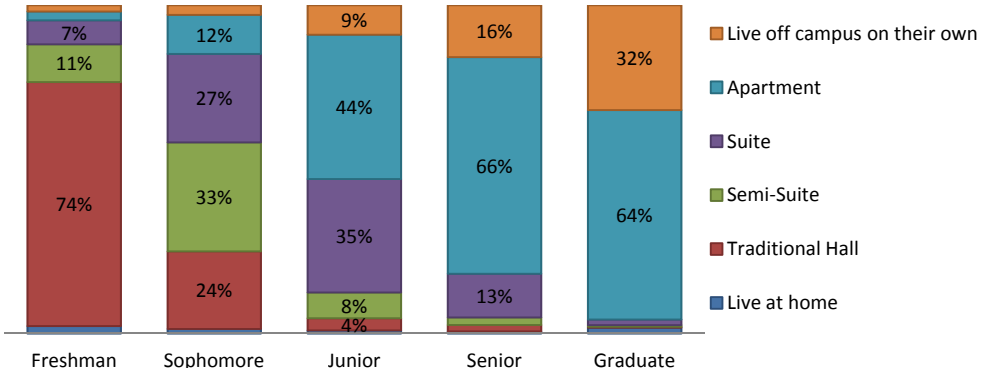

Figure 13: Appropriate Housing for Each Year of Study

Parents strongly believed that it is important for UM to provide student housing. Most believed that it is extremely important for UM to provide housing to freshmen and sophomores. Respondents answered for all categories, not only those to which their child belongs; Figure 14 shows how parents responded. When "extremely important" and "somewhat important" are combined (the blue and the red bars), it is evident that respondents believed that providing housing to Freshmen Connection students, juniors, transfer students, and undergraduate international students was at least somewhat important. Family housing and graduate housing were not priorities for parents. Parents found providing housing was more important than the student respondents did for most cohorts, in particular, Freshmen Connection students, sophomores, juniors, and international graduate students.

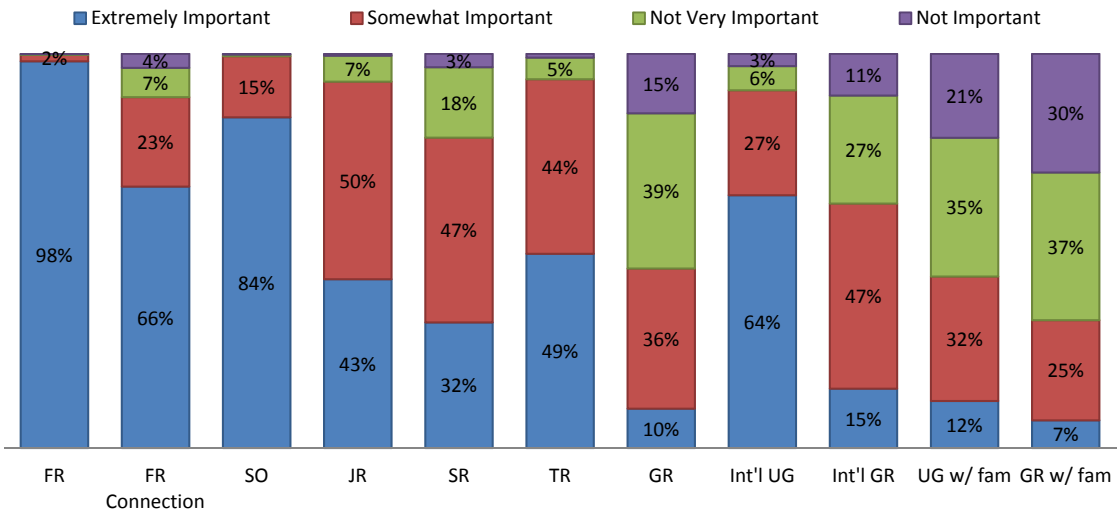

Figure 14: Importance of Providing Housing, Parent Response

According to parents (who selected their top five factors), the most important factors when choosing a place to live are affordable rent, an academic environment, and security of the building or unit. The top 25 factors are ranked in Figure 15.

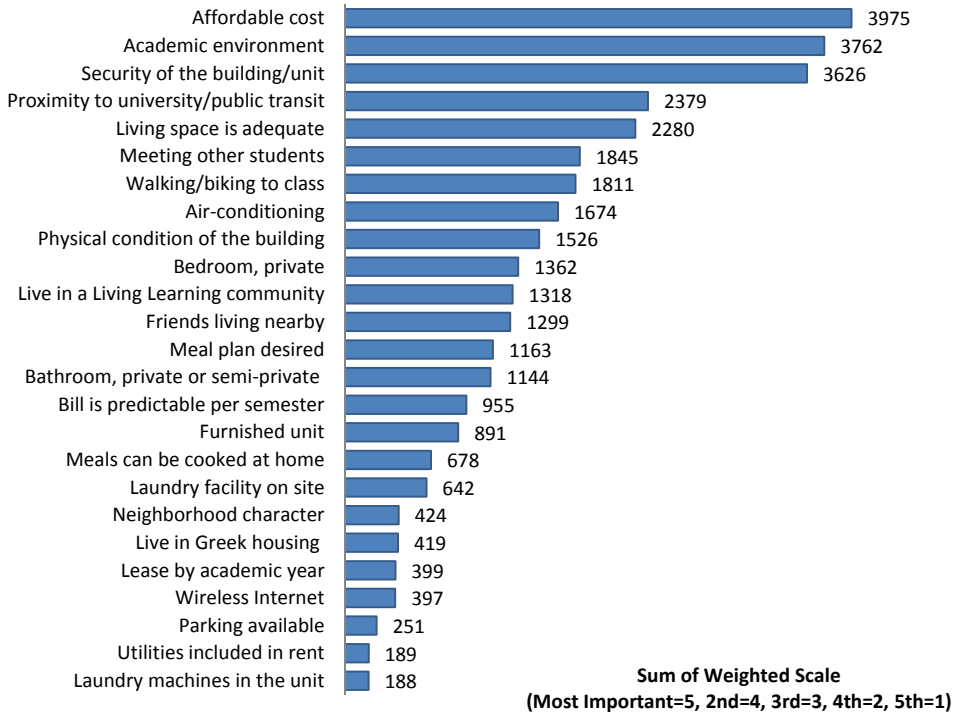

Figure 15: Important Factors, for Parents, in Choosing Where to Live

The survey described several different unit types and living situations with per-person or per-unit rents. The same options were offered on the student survey and are described on page 52. When considering their child's living situation, parents of freshmen and sophomores preferred a traditional double-bedroom residence hall

while juniors' and seniors' parents preferred a single-bedroom apartment. Nearly all other options were acceptable by 48% or more except for a single-family home, a conventional apartment, or a Knox Box apartment.

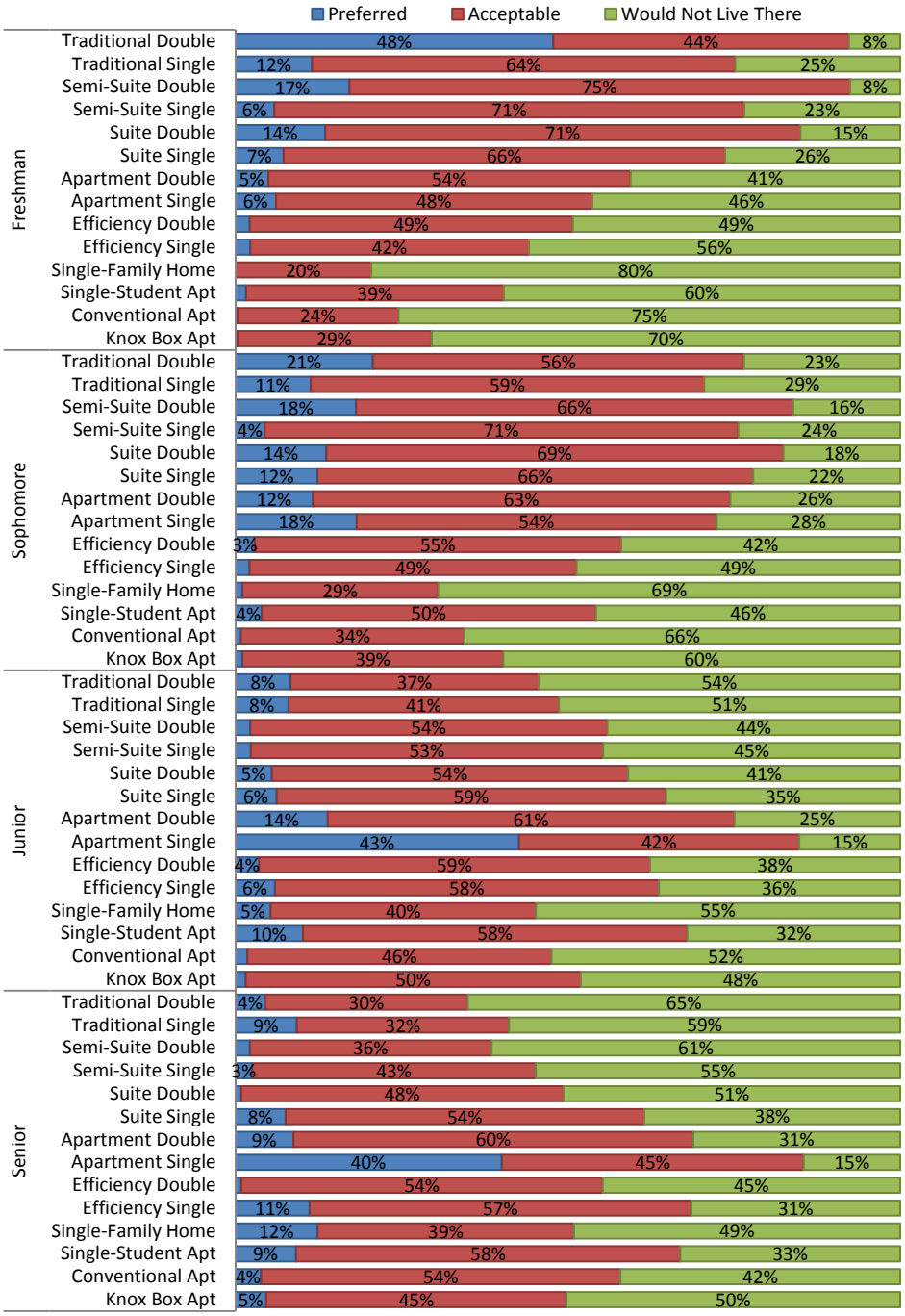

Figure 16: Parents' Preferred Unit Types

In comments on the parent survey, parents were strongly in support of some facilities upgrades. "All traditional dorms at UMD should have air conditioning. The College Park area is too hot and humid to live comfortably

without it," said one. "Dorm experience was not so good due to lack of air conditioning in the older high rise dorm. Chose to move out before her sophomore year. Other students were assigned much better dorm conditions." "Very disappointed—dorm had not changed in the 25 years since I attended UMd.," said another.

Another theme common in the parent comments was that: "I believe strongly every campus housing option should be available to every student of any year who desires it." Parents of transfer and Freshman Connection students in particular seemed incredulous that a university like UM does not offer their children housing.

Parents were generally positive about South Campus Commons, aside from the expense, as one said, "The South Commons is a wonderful place to live because it is near the business school and the amenities are nice. It is a little too expensive and the open door policy and interaction is missing from conventional dorms."

While parents seemed generally pleased with the features in individually-leased apartments in private developments , many felt forced to have their children live there and often noted the high cost: "While I would have preferred that my daughter be in a freshman dorm, this was not an option since she's in Freshman Connection. Given that, we are very happy that she was able to get an apartment in the Varsity, which is beautiful!"

PEER INSTITUTION ANALYSIS

BEDS TO ENROLLMENT

The percentage of beds to total enrollment (including both undergraduate and graduate students) for fall 2010 is shown in Figure 17 Academic Peers, Figure 18 Competitor Peers, and Figure 19 Situational Peers with the first figure being the number of beds offered and the second being total enrollment. Fall 2010 data is used to match the timing of the survey as well as in recognition of the fact that the FY'12 census date (the date enrollment is officially determined) had not yet been reached at the surveyed campuses. UM had the capacity in fall 2010 to house 31% of enrollment which is above the median for academic and competitor peers.[4] RUTG had the highest percentage, with the ability to house 39% of enrollment. Median and average percentages are noted for each peer group below. The addition of Oakland Hall in fall 2011 increased UM's beds to enrollment from 31% to 33%.

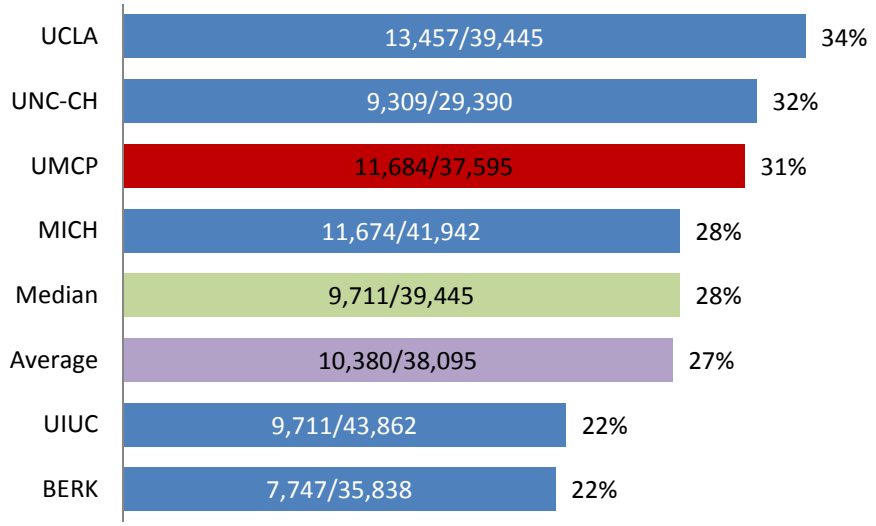

Figure 17: Academic Peers, Beds as Percent of Enrollment, Fall 2010

[4] UM opened Oakland Hall in fall 2011 bringing their beds-to-enrollment to 33%.

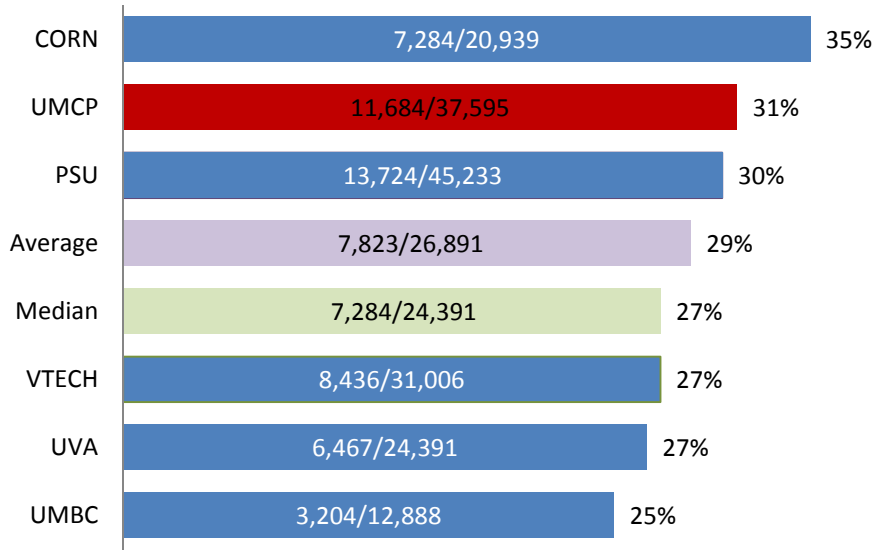

Figure 18: Competitor Peers, Beds as Percent of Enrollment, Fall 2010

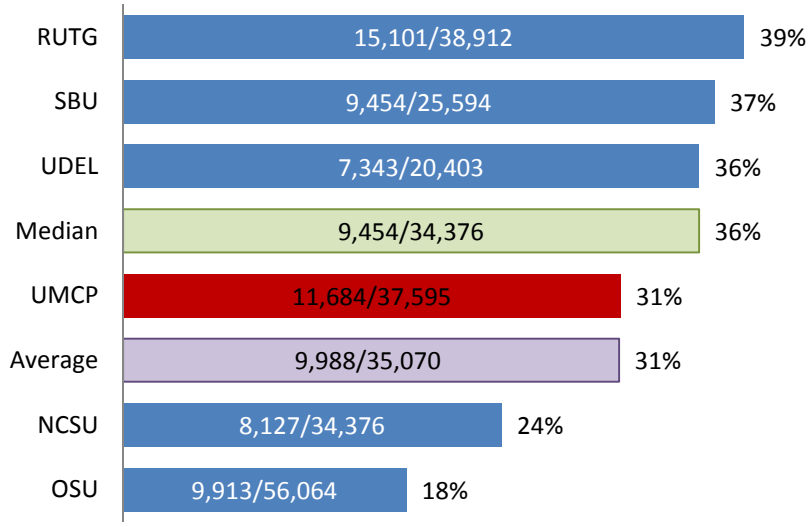

Figure 19: Situational Peers, Beds as Percent of Enrollment, Fall 2010

2011-12 COST

UM charges the same rate for all students assigned to a double or a single room in traditional residence halls, semi-suites, and suites.[5] For 2011–12 the rate is $5,793. No other peer has this policy; however, two institutions have a similar policy where all freshmen, regardless of room type, pay the same housing rate: UVA charges $4,870 and UDEL charges $6,450. Figure 20, Figure 21, and Figure 22 show the rate for a double room in a tra-

[5] The rate for a triple bedroom in a traditional residence hall, semi-suite, or suite at UM is $4,924