

Student Preferences in Housing

Survey data analysis: preferred unit styles and costs

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Student housing has the potential to offer multiple benefits and risks. Living in student-focused housing can, for example, ease a student's adjustment to college, improve study habits and enhance general well being (Enochs & Roland, 2006¹). From the broader standpoint of the college or university, housing is an increasingly important factor in recruiting new students (June, 2006²). In nationwide research by The Scion Group, many schools have reported that residential learning communities have been effective at increasing students' engagement and retention. For the larger communities in which schools are located, purpose-built student housing may enhance neighborhood life and provide increased partnerships between the school and community, such as expanding service learning opportunities for students.

Nonetheless, these benefits also come with challenges, potentially including high financial costs and negative impact on public relations. Accordingly, the more an institution understands about student housing, the better it can minimize the risks while capitalizing on the benefits.

Over the past ten years, The Scion Group has collected survey responses from more than 30,000 students through customized survey instruments developed to address the needs of specific clients and projects. The following analysis considers 13 of those surveys, representing responses from nearly 6,000 students. The selected surveys are included where the questions were similar enough to support comparisons. These surveys have a specific focus on single-student preferences regarding a variety of unit types.

By examining multiple unit types, the physical attributes students prefer can be studied – for example, what features and amenities will students dislike, find acceptable or find particularly appealing, and how much privacy is worth additional cost to students. Developing more complete knowledge of what students seek when considering cost in their housing can help not only when evaluating new housing, but also when trying to make the best use of existing inventory. New construction or major renovations happen only rarely in the life-cycle of a student housing community, making it even more critical to incorporate preferred design elements from the outset.

Scion has drawn some broad conclusions about single-student preferences through the quantitative survey data collected, along with qualitative data collected via numerous focus-group sessions, observations and anecdotal evidence. Data collection methods, summaries and conclusions are presented below, together with notes on limitations of the data and the analysis.

Data Collection

The data presented below were collected through surveys designed for individual institutions and projects with input from each institution. The 13 surveys included in the analysis represent student preferences at 13 campuses – five private and eight public institutions throughout the continental United States and Canada. The population targeted by the survey on each campus ranges from 391 to 37,943 individual students.

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¹ Enoch, W. K. & Roland, C. B. (2006). Social adjustment of college freshmen: The importance of gender and living environment [Electronic version]. *College Student Journal* 40(1). Retrieved March 7, 2008, from web.ebscohost.com.turing.library.northwestern.edu/ehostdetail?vid=4&hid=120&sid=6d395e80-1e28-4524-b8a1-998b5236a0ab%40sessionmgr108

² June, A. W. (2006a, June 9). Facilities play a key role in students' enrollment decisions, study finds [Electronic version]. *The Chronicle of Higher Education*, 51(21). Retrieved November 26, 2007, from <http://chronicle.com.turing.library.northwestern.edu>

Surveys were circulated to each target student population electronically, typically via e-mail addresses provided by the school. The demographic groups of those receiving the survey (e.g., graduate or undergraduate, full time or part time, specific programs of study) were selected in cooperation with the institution in order to support the goals of the particular study. In most instances, a nominal incentive was offered for participation, such as a gift certificate to the school bookstore or entry into a drawing. The surveys were typically open for response for approximately 10 to 14 days and were launched a few days before consultants visited campus to conduct focus-group sessions regarding student housing preferences. In Scion's experience, this practice appears to maximize response rate. All surveys were developed and analyzed using Vovici Feedback software.



For the purposes of this analysis, we have focused on surveys that were administered to undergraduate and graduate students without dependents and included questions about traditional student housing unit types and apartments. Because the needs of students with dependents are markedly different from students without dependents, a separate, future analysis is merited for those students. Although survey respondents are instructed to consider each unit type being proposed in a survey independent of other unit types, Scion believes that some relative interest exists – that is, even while instructed to consider unit types separately, students likely report their interest in one unit type relative to their interest in another unit type. For that reason, only surveys that ask about a wide spectrum of similar unit types are included, in order to achieve a level of consistency among survey responses. The surveys ask only about on-campus housing.



Both undergraduate and graduate students are represented in the data. Although intentional student housing that combines the two populations is rare, the interests of both groups can be studied together for a variety of reasons. First, to the extent undergraduates and graduates are single, they may be interested in the same range of unit types. Additionally, if all available beds are not fully occupied, housing graduate and undergraduate students together (whether intermingled or by floor or wing) is an occupancy management strategy sometimes used for filling those vacancies,

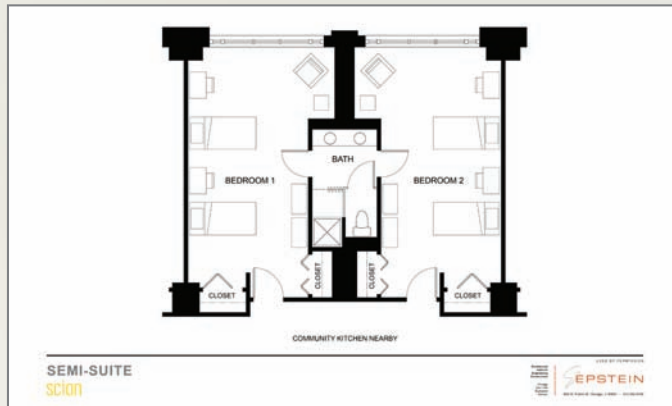
particularly in apartment-style communities. Only responses from full-time students were included in this analysis, as Scion's experience shows that full-time students are more likely to live in intentional student housing than part-time students. In the analysis, students are separated into the following demographic cohorts to provide consistency from survey to survey: first-year, second-year, upper-division and graduate students.

Respondents' preferences were examined for a variety of unit types. **Undergraduate students** were asked about the following traditional floor plans:

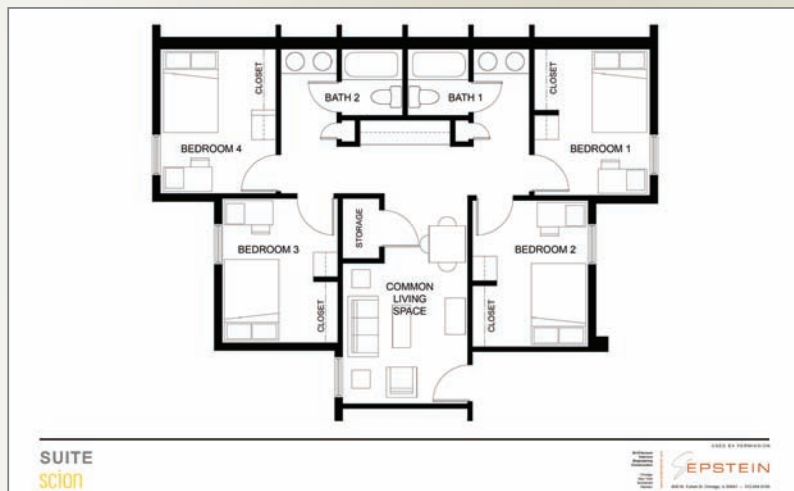
- Traditional double occupancy (one room, no bathroom or kitchen, shared by two students)



- Semi-suite double occupancy (one room, semi-private bathroom, no kitchen, shared by up to four students)



- Suite single (single occupancy bedroom with semi-private bathroom, shared living room and limited cooking facilities)



Undergraduate and graduate students were also asked about the following apartment floor plans:

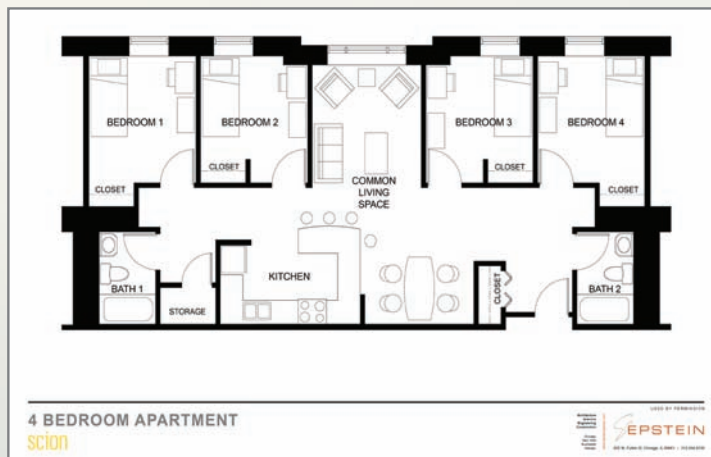
- Studio/efficiency (single occupancy room with private bathroom and full kitchen)



- Two-bedroom apartment (two single-occupancy bedrooms with semi-private bathroom and shared full kitchen and living room)



- Four-bedroom apartment (four single occupancy bedrooms with semi-private bathrooms and shared full kitchen and living room)

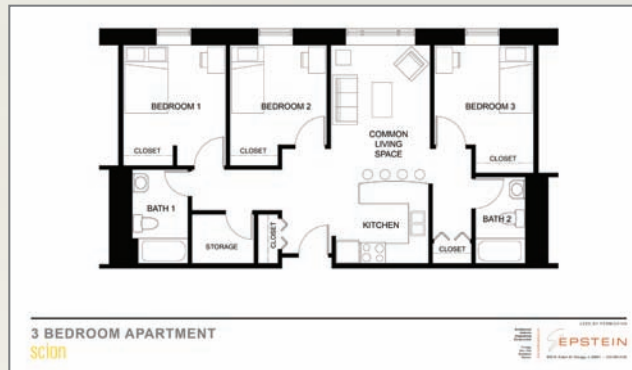


Graduate students were also asked about two other apartment floor plans:

- One-bedroom apartment (single occupancy, private bathroom, full kitchen and living room)



- Three-bedroom apartment (three single occupancy bedrooms, two bathrooms and shared full kitchen and living room)



Data Summary

The charts below reflect responses from approximately 6,000 students collected between November 2006 and May 2009. Thirteen institutions are represented, of which eight are public and five are private. Two institutions are two-year schools; one is a partnership between two institutions – a two-year and a four-year school in which students can have dual enrollment. The institutions are located in 12 states and provinces, 11 within the continental United States and one in Ontario, Canada. Some basic characteristics about the institutions are noted in the chart below.

Institutional Overview

Institution	2 Year / 4 Year or above	Public / Private	Location	Student Demographic Surveyed	Enrollment, Fall 2008 ³
1	4 year	Private	California	Graduate	391
2	2 year	Public	Florida	Undergraduate	4,032
3	4 year	Public	Florida	Undergraduate & Graduate	37,943
4	4 year	Public	Georgia	Undergraduate	6,998
5	4 year	Private	Maryland	Graduate	1,240
6	4 year	Private	Massachusetts	Graduate	1,052
7	4 year	Public	Michigan	Undergraduate & Graduate	4,676
8	2 year	Public	New Mexico	Undergraduate	2,454
9	4 year	Private	Ohio	Undergraduate	1,146
10	2 year & 4 year programs available	Public	Ontario, Canada	Undergraduate & Graduate	12,800
11	4 year	Private	Pennsylvania	Graduate	4,432
12	4 year	Public	Wisconsin	Undergraduate & Graduate	10,198
13	4 year	Public	Wisconsin	Undergraduate & Graduate	2,388

Undergraduate Students

The following chart represents the percentage of respondents in a given demographic cohort (first-year students, second-year students, upper-division students) who reported some interest in a particular unit type. That is, the percentage of respondents in that cohort that indicated they would consider living in that unit type, when considering cost as a factor.

³ Enrollment figures are from institutional websites and NCES. Some institutions may have reported 2007 or 2009 enrollment figures. Enrollment represents the population surveyed. For undergraduate students, only full-time students are counted. Due to the wide variety in how part- and full-time is defined for graduate students, all graduate (full time and part time) students are counted toward the total when they participated in the survey.

Interest in Unit Type by Demographic, Considering Cost as a Factor

	First Year	Second Year	Upper Division
Traditional Double	77%	68%	54%
Semi-Suite Double	75%	68%	52%
Suite Single	86%	81%	72%
Studio/Efficiency	83%	73%	69%
2 BR Apartment	77%	73%	74%
4 BR Apartment	84%	78%	72%

As a group, first-year students were generally more interested than the other groups in any type of campus housing. Among first-year student respondents, 75% to 86% expressed interest in the above unit types, compared with 68% to 78% of second-year student respondents and 52% to 74% of upper-division student respondents. Among all respondent groups, the three most preferred unit types (83% to 86%) are all among first-year students: Suite Single, Four-Bedroom Apartment and Studio Apartment. The most popular unit type among all cohorts is the Suite Single.

Graduate Students

The chart below represents the percentage of graduate students who reported interest in a particular unit type. The highest percentage of respondents among single graduate students, when considering cost, reported interest in a Four-Bedroom Apartment. The unit type with the least appeal for single, on-campus graduate student housing was a Studio/Efficiency Apartment.

Interest in Unit Type, Considering Cost as a Factor

	Graduate
Studio Apartment	59%
1 BR Apartment	68%
2 BR Apartment	70%
3 BR Apartment	71%
4 BR Apartment	75%

Relative Interest by Unit Type and Cost

The following chart represents relative interest in each unit type for single students interested in campus housing. Relative interest is calculated by setting the highest percent of reported interest for all unit types (e.g., 86% for first-year students in a Suite Single, as described above) as the top of the range of reported interest, and setting the lowest reported interest (e.g., 52% of upper-division students in a Semi-Suite Double) at the bottom of the range, then dividing that range into quartiles.

First-year students generally have more interest in all types of purpose-built campus housing; such interest generally decreases as students progress in class-standing. The chart below demonstrates the advantage of integrating a variety of product type into a campus housing system. Traditional Doubles and Semi-Suite Doubles, which offer shared bedrooms, have the highest density among the various floor plans tested. Both unit types seem to be well accepted by first-year students

and moderately accepted by second-year students. Further, they serve an important function in fostering a sense of community for students away from home by facilitating increased interactions among residents. These units are likely to perform better financially, which can help support other housing options that offer higher levels of privacy in less dense facilities. Campus housing officials have shared with Scion that having options for higher levels of privacy available to upper division students supports campus retention efforts.

One of the major factors impacting campus housing costs is the number of kitchens in the facility; a high ratio of residents to kitchens significantly lowers overall construction costs. Notably, graduate students expressed higher interest in on-campus Two-, Three-, and Four-Bedroom Apartments than in on-campus One-Bedroom Apartments. This result is presumably due to the cost difference, as all of these unit types offer a private bedroom – probably essential for most single graduate students. On the other hand, Studio Apartments were very popular among undergraduates despite being the most expensive option tested with that demographic. Undergraduates, particularly first-year students, appear to be less focused on cost than graduate students.

Campus Housing Unit Configurations

Key	Symbol	Low Value	High Value
1st Quartile – highest interest	●	0.75	1.00
2nd Quartile	◐	0.50	0.74
3rd Quartile	○	0.25	0.49
4th Quartile – little to no interest	(blank)	0.00	0.24
Not applicable / not tested			

Unit Type Preferences When Considering Cost	First Year	Second Year	Upper Division	Graduate
Traditional Double	◐	○		
Semi-Suite Double	◐	○		
Suite Single	●	●	◐	
Studio Apartment	●	◐	◐	
1 BR Apartment				○
2 BR Apartment	●	◐	◐	◐
3 BR Apartment				◐
4 BR Apartment	●	●	◐	◐

General Observations
Undergraduate Students

Generally, a higher percentage of respondents in all demographic cohorts report an interest in suite- and apartment-style units. Interest in traditional double rooms is highest for first-year students, followed by second-year students, yet neither group was more interested in this unit type than others. The balance between privacy and price in the Suite Single design likely results in its high popularity among all respondent groups; it is close in popularity to Four-Bedroom Apartments among all groups and more popular than (higher priced) Studio- and Two-Bedroom Apartments for first/second-year respondents. Notably, Scion does not always endorse this style of housing for the first-year student demographic, as the benefits of a roommate or suitemate, the overall connection to planned student outcomes and financial performance must also be considered.

Among the respondent groups, first-year students have the highest overall interest in campus student housing and demonstrate moderate to high relative interest levels for all unit types. This result reinforces Scion's observation that while first-year students will express interest in single rooms and private bathrooms when presented with the option, they will also accept traditional-style housing because it is generally aligned with the expectations of most. This may represent the general excitement many traditional first-year students have about living independently for the first time, but may also be attributable to other reasons. This willingness of first-year students to live in traditional housing supports the idea of a housing system continuum – where students “earn” increased privacy and independence as they grow through the housing system – both for purposes of financial performance and to reinforce retention initiatives. In other words, students may be more likely to stay in the housing system if there is more attractive housing toward which to migrate.

As a respondent group, second-year students expressed at least some interest in all unit types; Suite Singles and Four-Bedroom Apartments attracted interest from the highest percentage of these students. There was some interest reported by second-year students in traditional style housing, which extends the possible appeal of traditional style halls to a broader market and which would likely be further enhanced if increased opportunities for a single room within traditional housing were available.

Perhaps not surprisingly, upper-division undergraduate student respondents expressed virtually no interest in traditional and semi-suite units. As a group, their highest interest was in the Two-Bedroom and Four-Bedroom Apartment units; they also expressed slightly more interest for a Suite Single than for a Studio Apartment. Interestingly, in focus group sessions of upper-division students, these students occasionally considered a lack of community in on- and off-campus apartment-style housing as a negative factor, particularly among those students who previously lived in more traditional-style housing. It may be the case that some students prefer sharing apartments and suites with others for that reason, although cost is also a determining factor for most students and parents; living alone is typically more expensive.

Graduate Students

Among single graduate student respondents, the unit type for on-campus housing with the highest interest when considering cost was the Four-Bedroom Apartment; the unit type with the lowest interest was the Studio Apartment. Graduate students were surveyed only about apartment options, rather than traditional residence hall style units or suites, because of the goals of the institutions engaged in the studies and because, in Scion's experience, graduate students typically have the highest need for privacy. Nonetheless, reported interest among graduate students grows as cost and, subsequently, privacy decrease, which suggests the importance of setting the right price point for graduate student housing; graduate students may be more price sensitive than undergraduates despite their typically higher need for privacy, particularly those who seek on-campus accommodations.

Limitations of the analysis

There are a number of limitations which may have impacted the data in this analysis, mostly related to the data collection methods and respondent populations. Survey design has the potential to impact response. Not all of the populations surveyed were provided with identical questions; because each survey was designed for a specific institutional client, there was variety in the questions due to preferences, goals, objectives and existing housing inventories on the campus being surveyed, among other factors. Strict statistical methods were not applied to the analysis of this data.

Respondent populations may also limit the ability of the data to reflect the general post-secondary education population. The data may be skewed by regional preferences, the age of respondents and non-representative samples, although each survey achieved a margin of error of 5% or less. There may also be some response bias. The data relies on self-reported and unverified responses regarding class standing and other demographic information.

It should be noted that this analysis addresses a specific sample of the post-secondary student population. Nevertheless, the data supports anecdotal evidence that The Scion Group has gathered and observed in its experience. Scion therefore believes this analysis offers value in the consideration of current and future campus housing.

Scion's client work often focuses on feasibility analysis and price points, but even when housing design and rental rates are sufficiently matched to ensure financial performance, it is equally important to understand the desired impact of student housing. The influence on individual students, educational outcomes and a sense of community relating to certain styles of housing versus others remains essential. For an institution whose mission entails far more than simply keeping students sheltered, the larger implications of housing and its impact on the institution and the student must continue to be explored.

About the Authors

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Jason Taylor, Director of Consulting Services, and **Katharine Lennox**, Senior Associate – Consulting Services, also provided valuable assistance in preparing this analysis.

About Scion

The Scion Group is a real estate services provider with a single focus: student housing. Scion supplies facility and strategic planning, financial services, development consulting and operations assessments. Its team of experts offers the first-hand perspective of educators, operators and owners which enables our clients to create quality learning communities while improving financial performance.

Scion combines state-of-the-art methods for real estate analysis and modeling with an understanding and sensitivity of the unique nature, mission and specialized considerations of colleges, universities and other not-for-profit entities. It concentrates particularly on campuses where there are challenges to new or existing student housing – including markets with high barriers to entry, faculty/staff housing, housing for students with dependents, and schools seeking to create housing for the first time. Other areas of the firm's expertise include urban settings, community colleges, public-private partnerships, Canadian institutions and underperforming properties. Scion has been engaged to perform consulting services on or adjacent to nearly 100 campuses throughout the United States, as well as in Canada, Mexico and the U.K.

For more information, contact The Scion Group at (312) 704-5100 or info@thesciongroup.com, or visit www.TheScionGroup.com.

