



UNIVERSITY OF NORTH DAKOTA

STUDENT SURVEY ANALYSIS

JUNE 2019

SURVEY OVERVIEW



Survey Content

- : Demographics
- : Current housing arrangements
- : Current housing satisfaction
- : Future housing preferences



Population Surveyed

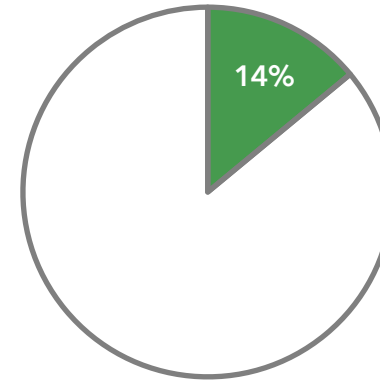
- : All current UND Undergraduate and Graduate Students
(10,400+ undergrads, 3,300+ grads)



Distribution

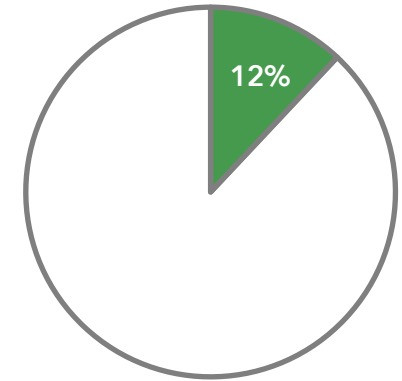
- : An online survey was issued to undergraduate and graduate students via email and newsletter
- : The survey was open for 3 weeks

Undergraduate Students



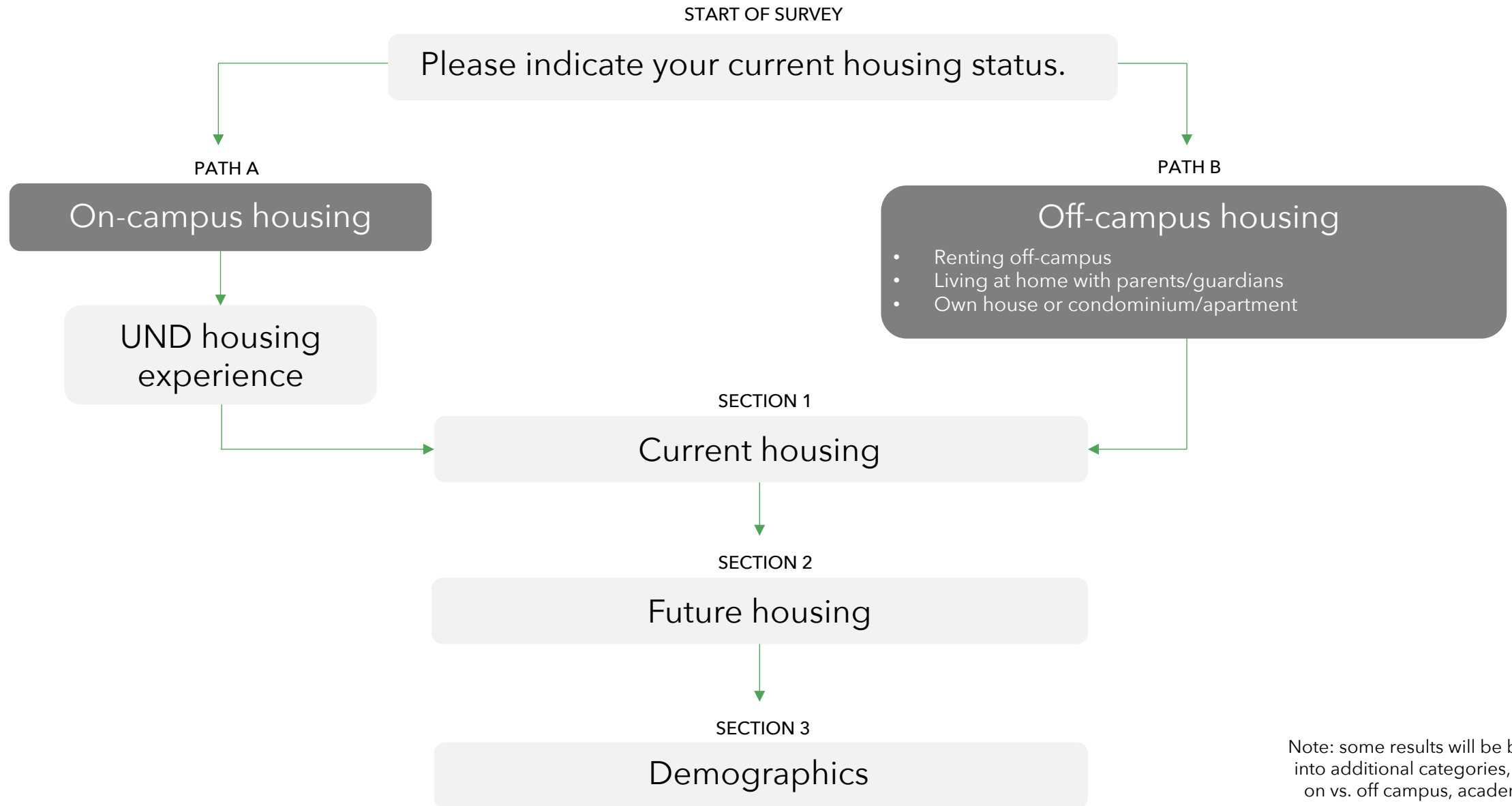
14%
Response Rate
1,461 respondents

Graduate Students



12%
Response Rate
388 respondents

METHODOLOGY



Note: some results will be broken down into additional categories, such as age, on vs. off campus, academic year, etc.

UNDERGRADUATE STUDENTS

UNDERGRADUATE RESPONDENTS

Population Profile



1,461
respondents



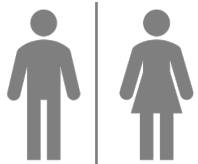
32%
walk to UND



18 - 20
median age
range



58%
commute to
UND by car

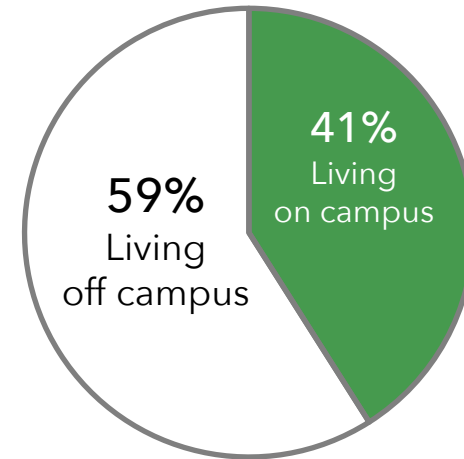


38% | 62%
Male | Female



89%
commute < 20
minutes to UND

Current Housing



Note: The on-campus respondent percentage (41%) is greater than the actual on-campus undergraduates at UND (26%).

UNDERGRADUATE KEY FINDINGS

Current Housing Satisfaction

- Though **64% of on-campus respondents are satisfied** with UND housing, **17%** find UND housing to be **unsatisfactory or very unsatisfactory** compared to other universities.
- Respondents indicated the most important factors in deciding where to live were: ability to **choose roommates**, availability of **preferred housing unit type**, **proximity to classes**, and **total cost of rent/mortgage** and utilities.

Current Housing Arrangements

- **41% of respondents** indicated they **live on campus**. **50% rent off-campus** and the remaining respondents either live with their families, are homeowners, or have another living situation.
- **Freshmen make up more than half** of the UND housing cohort.
- **Upperclassmen respondents tend to live off campus** as they advance to each academic year.
- **58% of off-campus respondents indicated** they lived in a **low-rise apartment or condo**, while **26%** reported living in a **single-family house**.
- **76% of off-campus respondents do not share a bedroom** with another person, but **72% of off-campus respondents have roommates**.

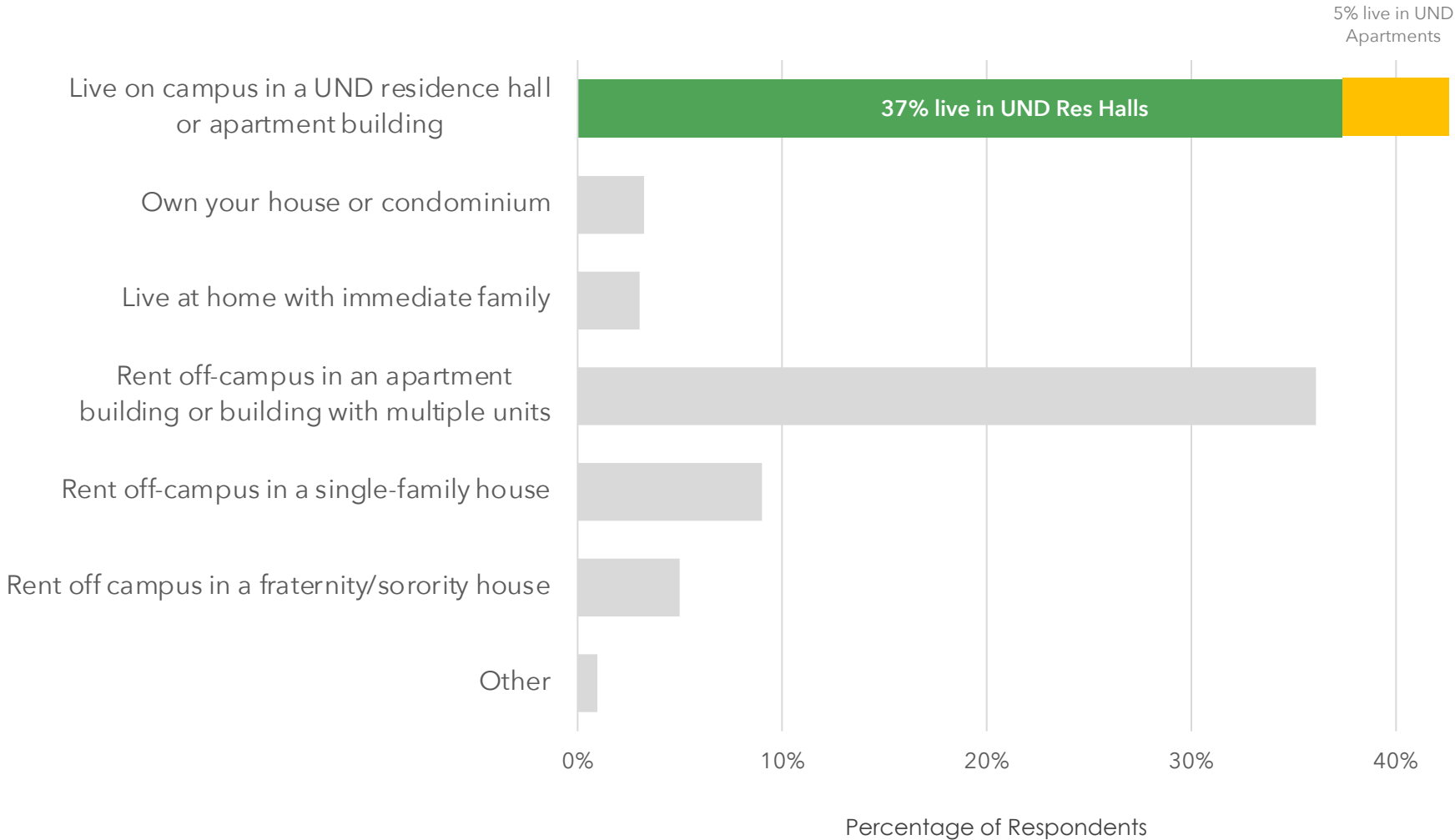
Future Housing Preferences

- About **61% of respondents have looked for new housing** in the past 5 years. Of that 61% cohort, only **6% have experienced difficulty** finding suitable housing.
- **15% of respondents** indicated they **were undecided** on where to live next year. Of that cohort, **12% would consider moving closer to campus** for a housing option that offered their desired amenities (this is approx. 1,250 undergrads).
- **57% of respondents** indicated they **planned to live off campus** next year. Of that cohort, **25% would consider moving closer to campus** for a housing option that offered their desired amenities (this is approx. 2,600 undergrads).
- **Top 5 Most Desired Housing Features:** In-unit kitchen, in-unit washer/dryer, living room, lease flexibility, secure access to building

SECTION 1: CURRENT HOUSING

SECTION 1: CURRENT HOUSING - ALL RESPONDENTS

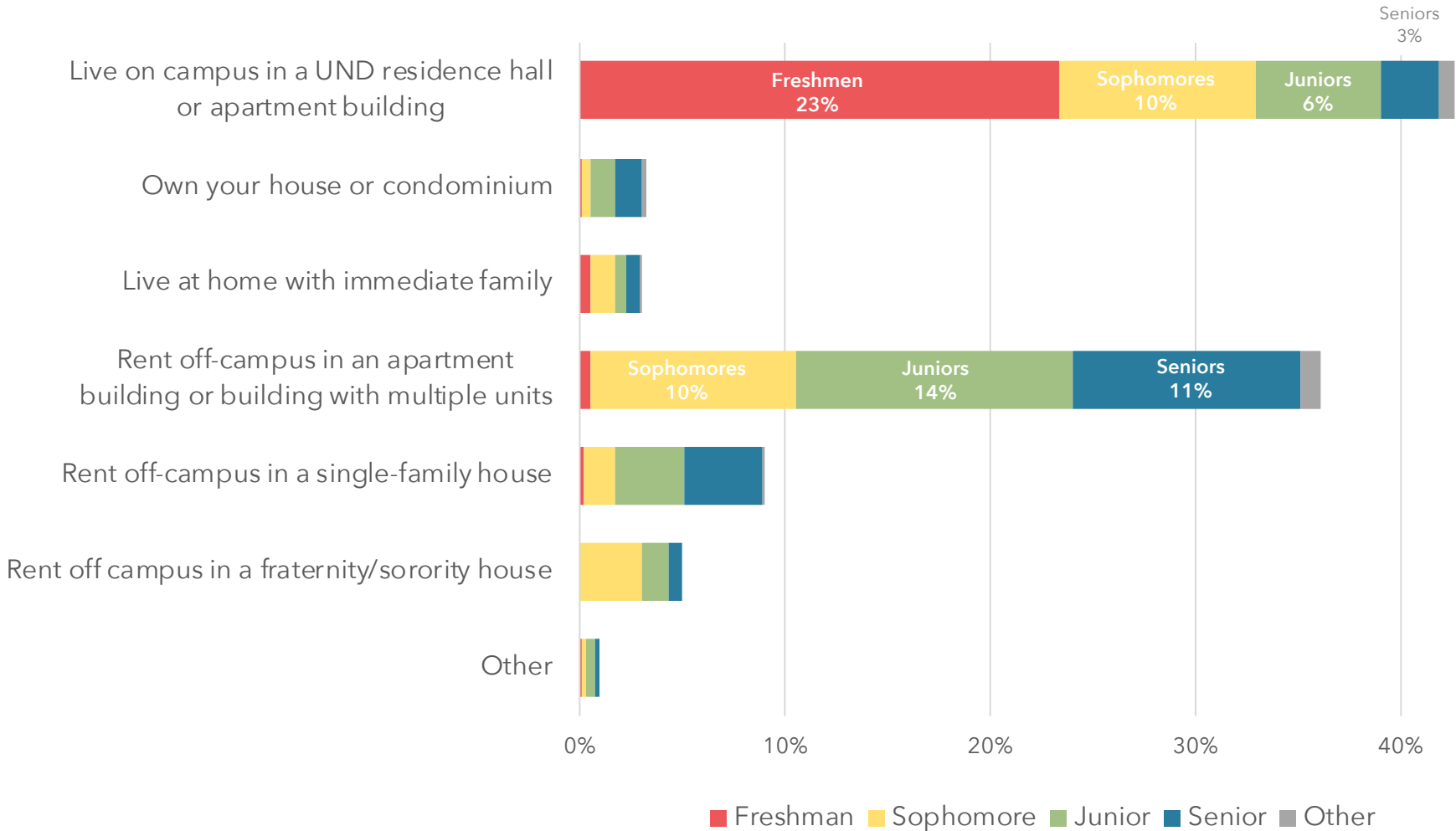
Please indicate your current housing status.



42% of respondents indicated they **live on campus**. **50% rent off-campus** and the remaining respondents either live with their families, are homeowners, or have another living situation.

SECTION 1: CURRENT HOUSING - ALL RESPONDENTS

Please indicate your current housing status.

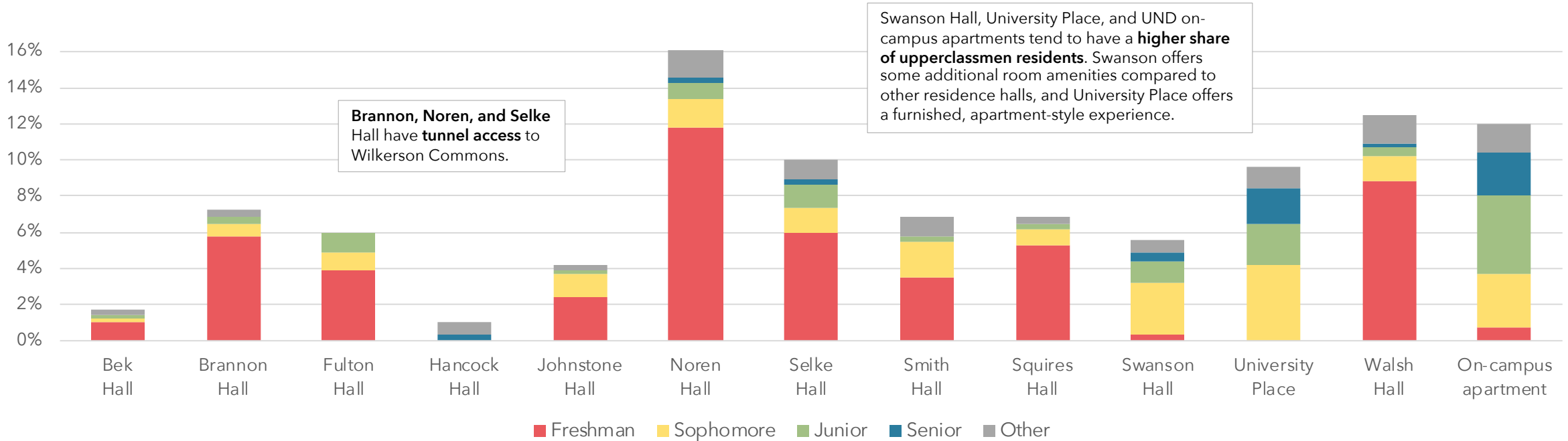


Housing status by year:
Freshmen make up more than half of the UND housing cohort.

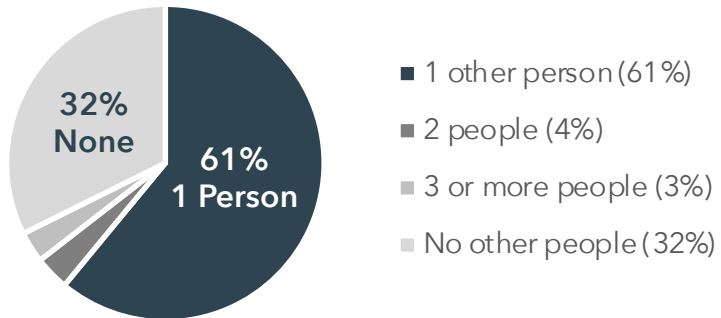
Upperclassmen respondents tend to rent off campus as they advance to each academic year.

SECTION 1A: CURRENT HOUSING - ON CAMPUS RESPONDENTS

Where do you currently live on campus?



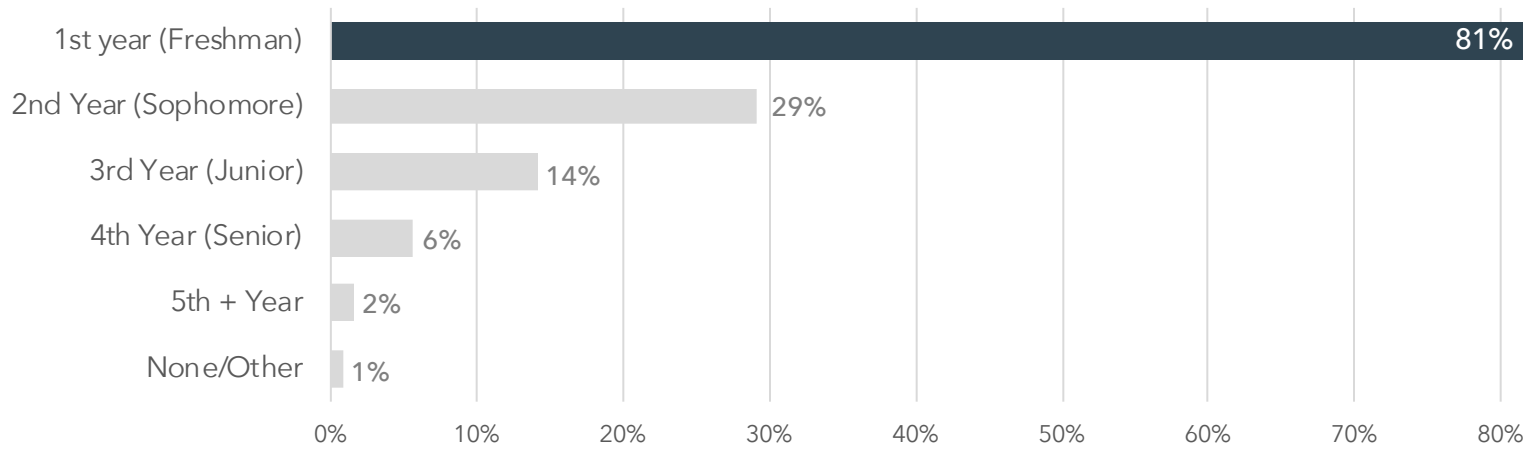
How many people do you share a bedroom with?



On campus residence by year: **Freshmen were more likely to live in residence halls and share a bedroom with 1 other person** compared to upperclassmen.

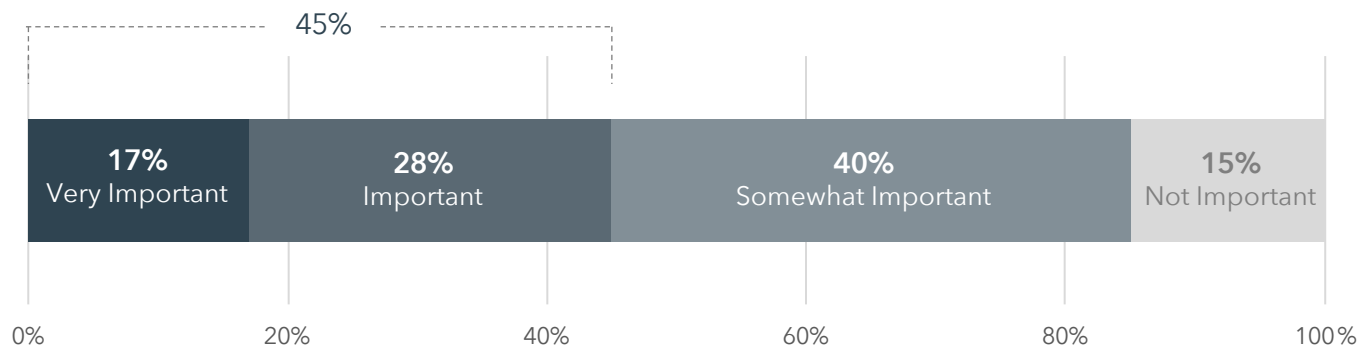
SECTION 1A: CURRENT HOUSING - ON CAMPUS RESPONDENTS

Which academic years have you lived in UND housing?



Freshmen were most likely to live in UND housing. As students age, they tend to live elsewhere.

How important was the availability of on-campus housing in your decision to attend UND?



45% of on-campus students indicated the **availability of on-campus housing** was an **important factor** in deciding to attend UND.

SECTION 1A: CURRENT HOUSING - ON CAMPUS RESPONDENTS

Please indicate which statements below describe your experience in UND housing.

Helped me acclimate to life at UND



Provided me with a sense of community



Had a positive influence on my academic performance



Encouraged me to be more active in student life on campus



Provided me with leadership opportunities



Feel connected to my residence hall



Introduced me to new friends



Provided me with a safe environment



Was a convenient living option



Helped me learn about people different than me



Exposed me to intellectual, cultural and social activities



Enhanced my overall experience at UND



Offered meaningful interaction with UND Faculty



Created an environment for interaction with faculty



My on-campus housing experience has made me more apt to support the University after graduation



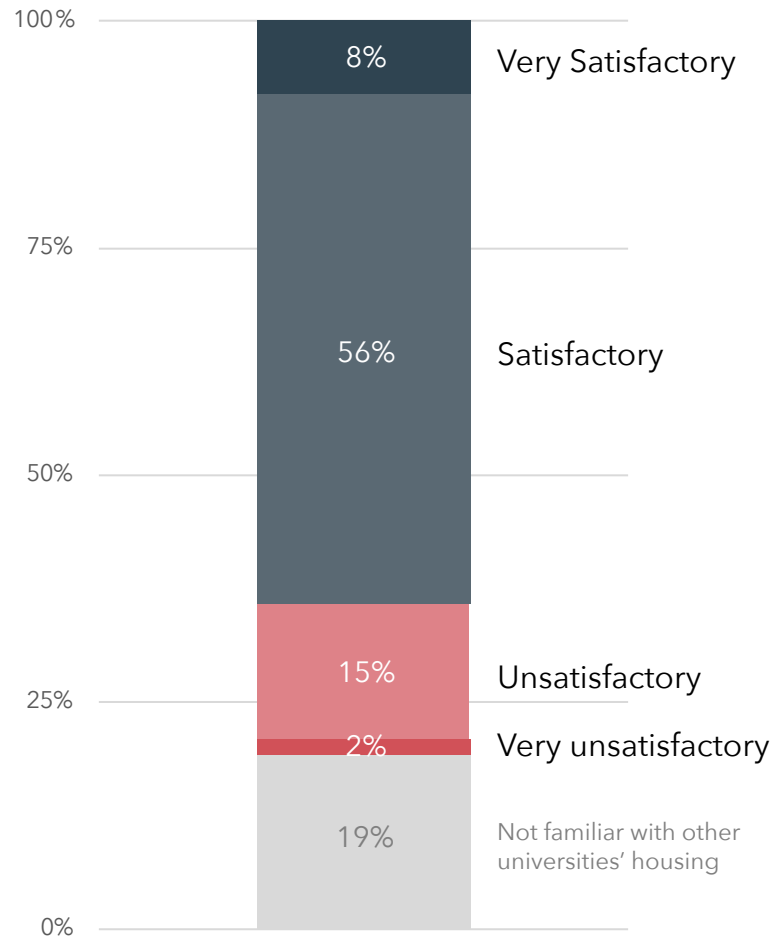
I did not enjoy/did not value my on-campus living experience



Over 40% of respondents

SECTION 1A: CURRENT HOUSING - ON CAMPUS RESPONDENTS

Compared to housing at other universities that you are familiar with, how would you rate your impression of UND housing?



Though **64%** of respondents are satisfied with UND housing, **17% of on campus respondents** find UND housing to be **unsatisfactory or very unsatisfactory** compared to other universities.

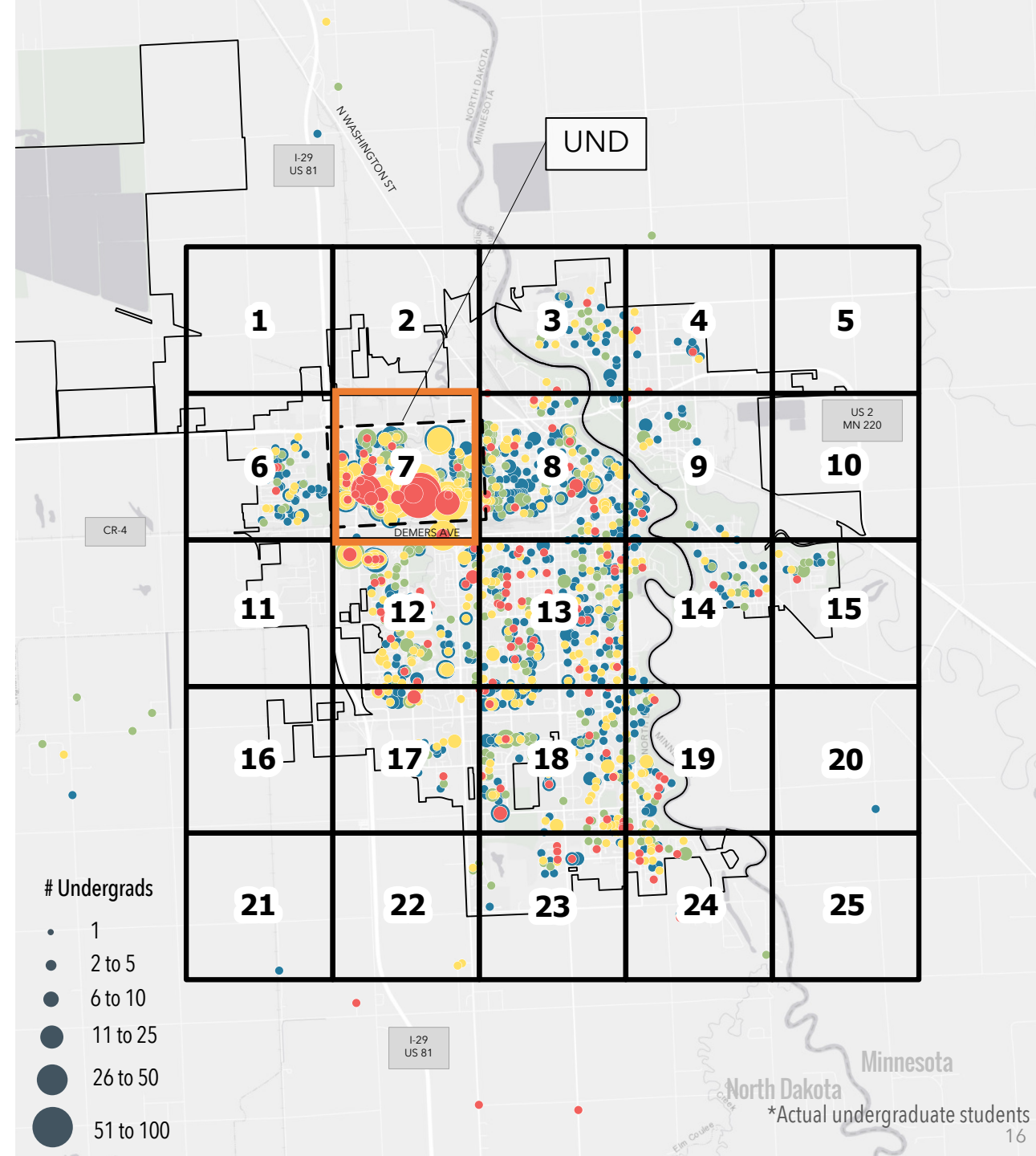
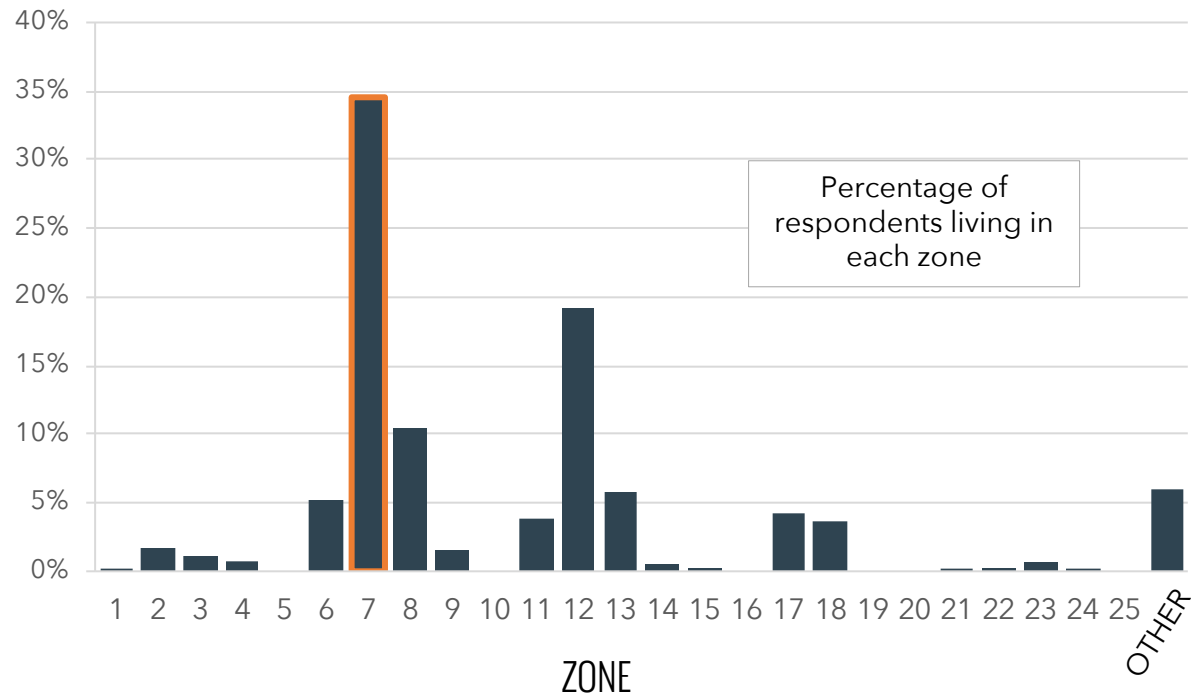
University Housing that respondents are most familiar with:

North Dakota State University
 University of Minnesota
 University of Minnesota Duluth
 Minnesota State University Moorhead
 Concordia College

SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

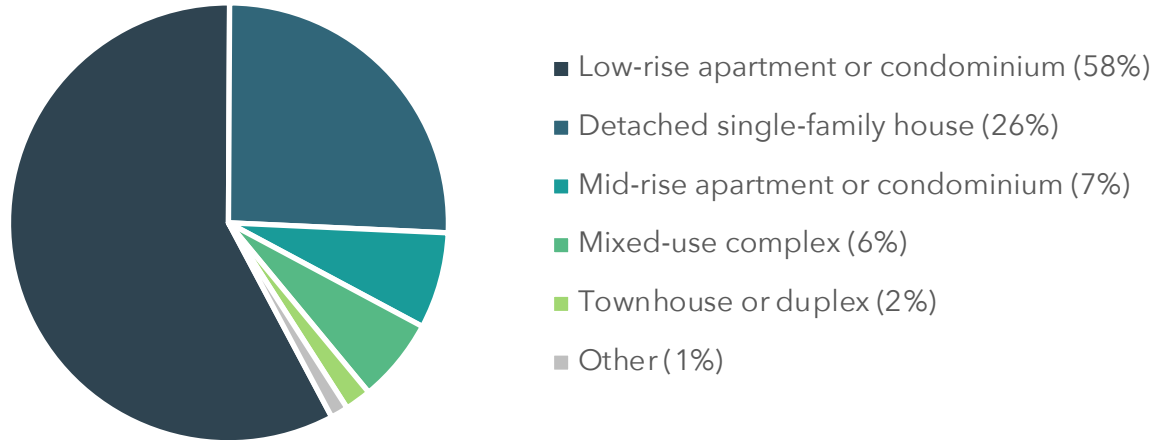
Please select the zone where you reside.

Zone 7 held the highest percentage of off-campus respondents at **35%**. Though these respondents **do not live in UND housing**, they tend to **live within the university district**.



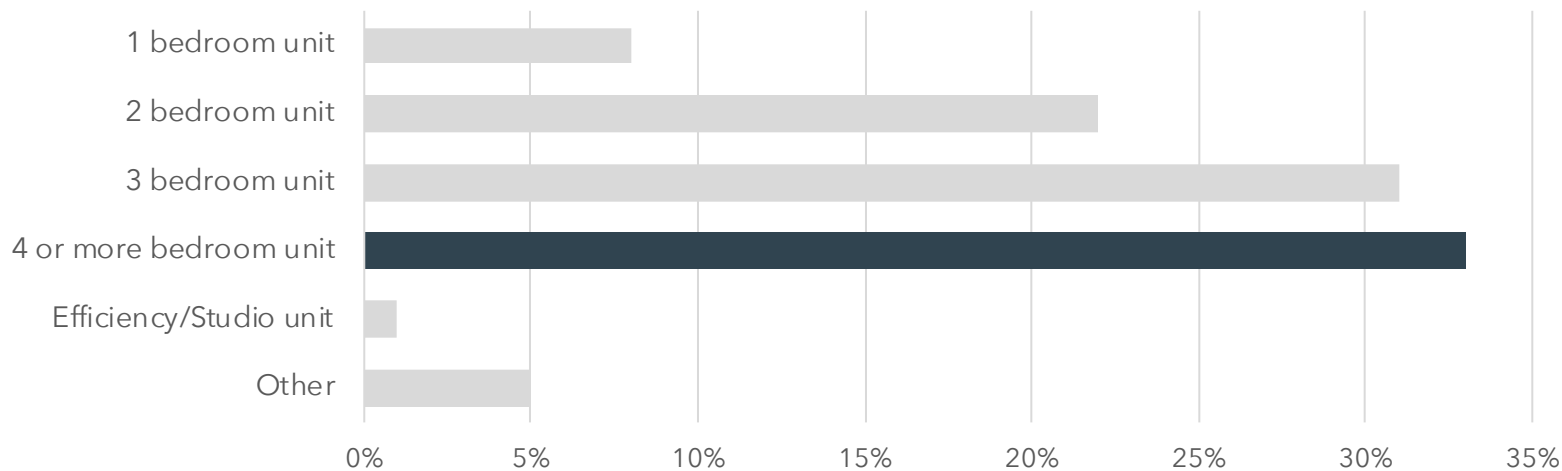
SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

Please indicate your current housing type.



58% of respondents indicated they lived in a low-rise apartment or condo, while 26% reported living in a single-family house.

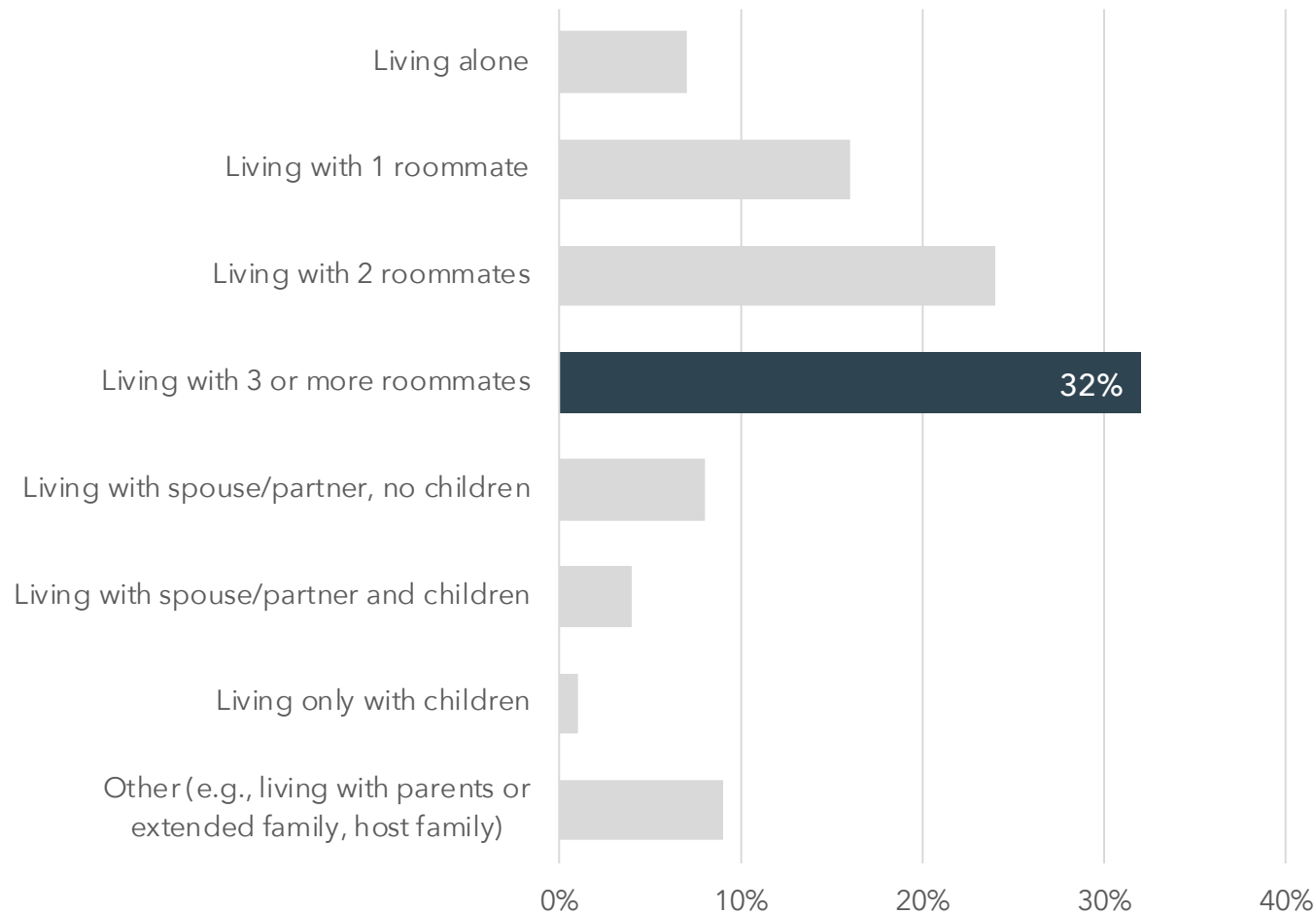
Please indicate your current unit type.



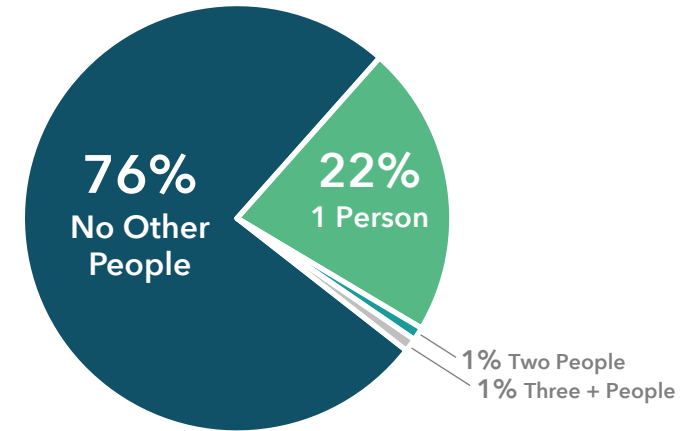
3 to 4-bedroom units were the most common housing unit type (64%). The remaining respondents indicated they lived in studios or 1 to 2-bedroom units.

SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

Please describe your current living situation.



How many people do you share a bedroom with?

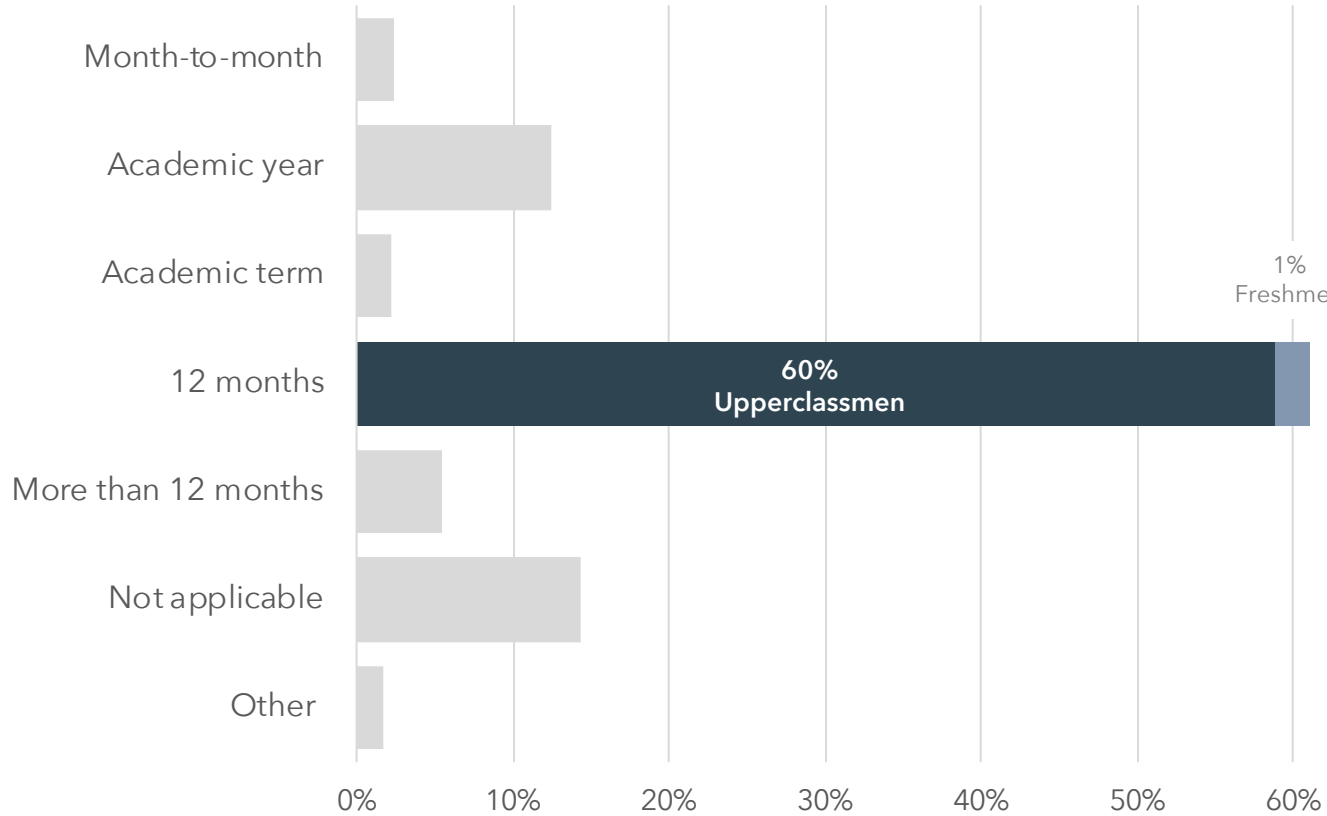


Though living with 3+ roommates was the most popular response, we see that **72% of off-campus respondents have roommates.**

Consequently, **76% of respondents do not share a bedroom** with another person.

SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

How long is your current lease?

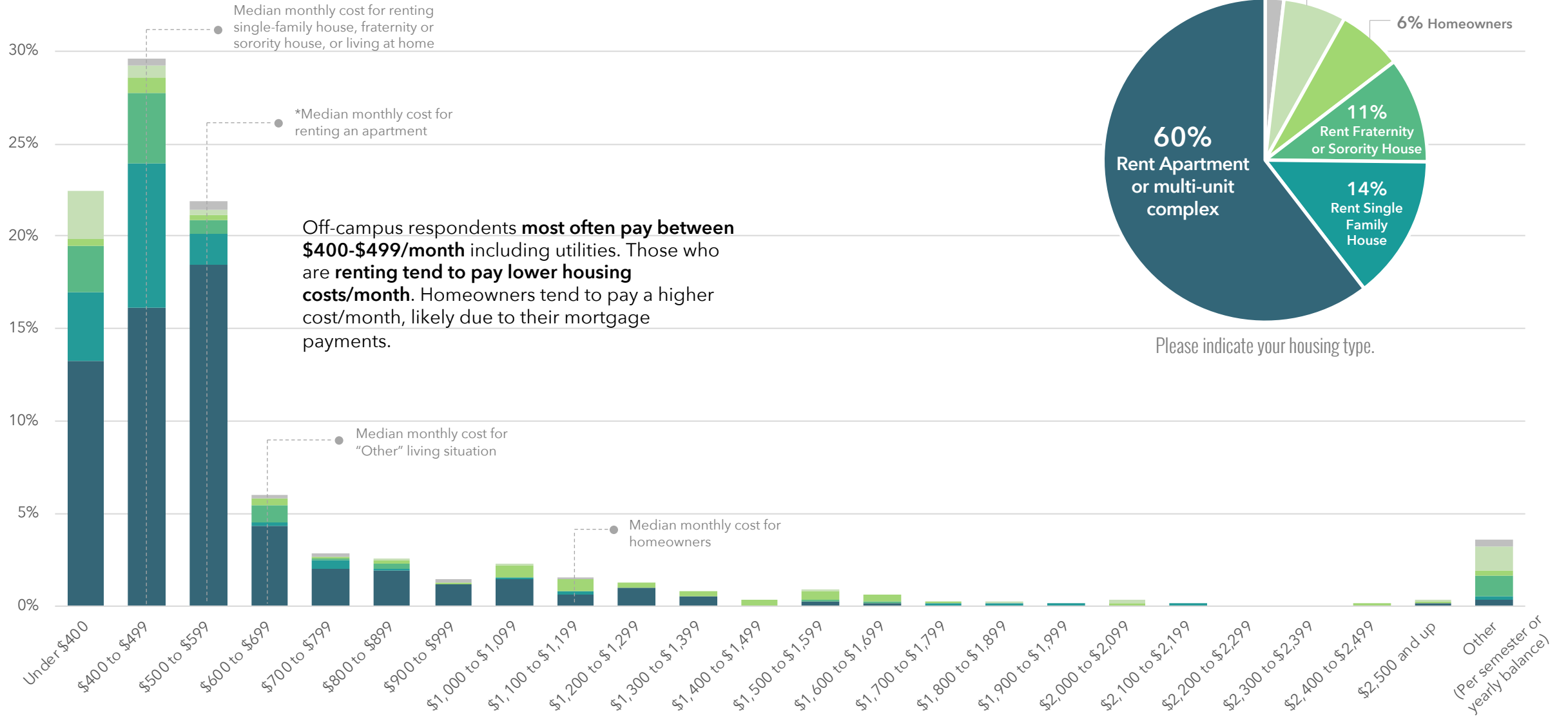


61% of off-campus respondents have **12-month leases** and are primarily **upperclassmen**.

SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

How much is your individual total monthly housing cost?

(RENT OR MORTGAGE INCLUDING TOTAL MONTHLY UTILITIES)

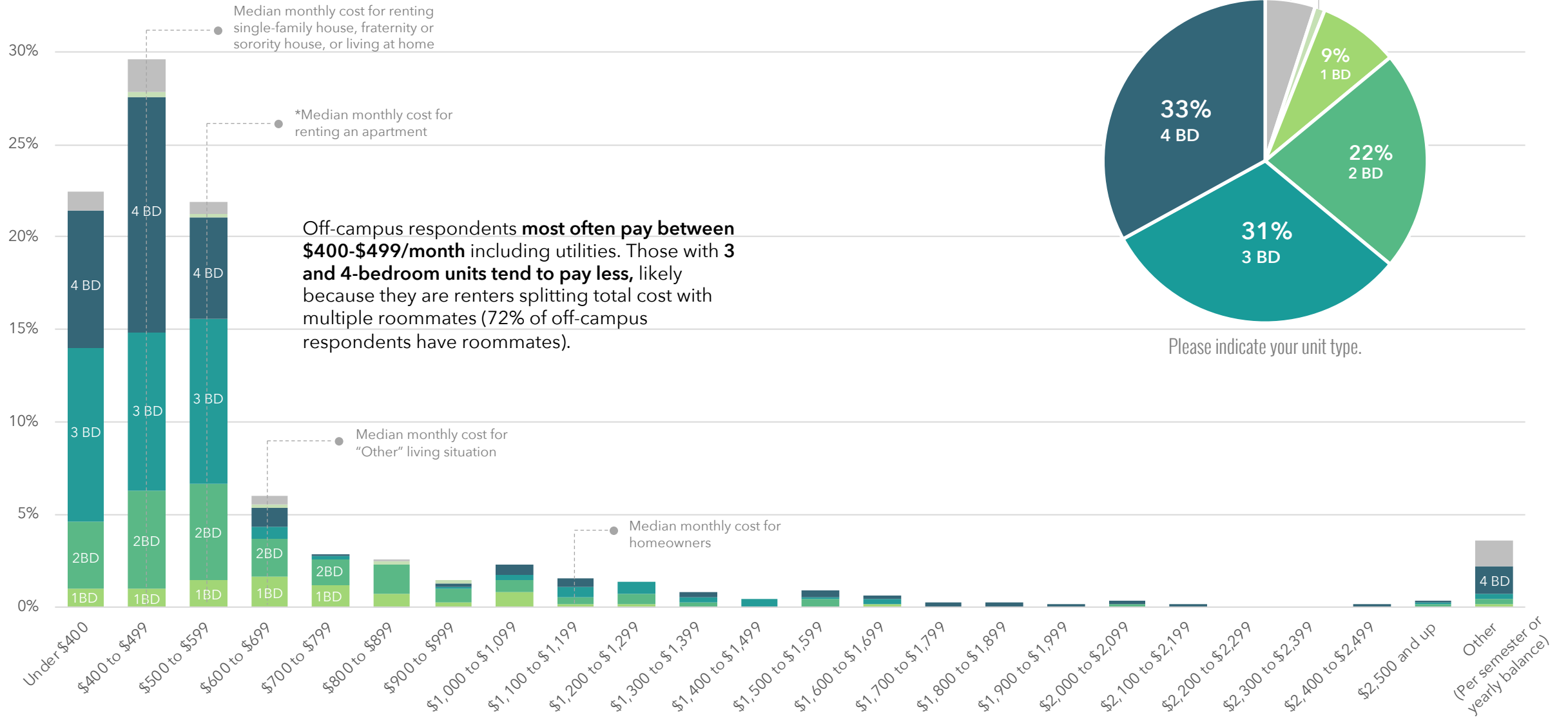


* (85% of apartment renters had 12+ month leases)

SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

How much is your individual total monthly housing cost?

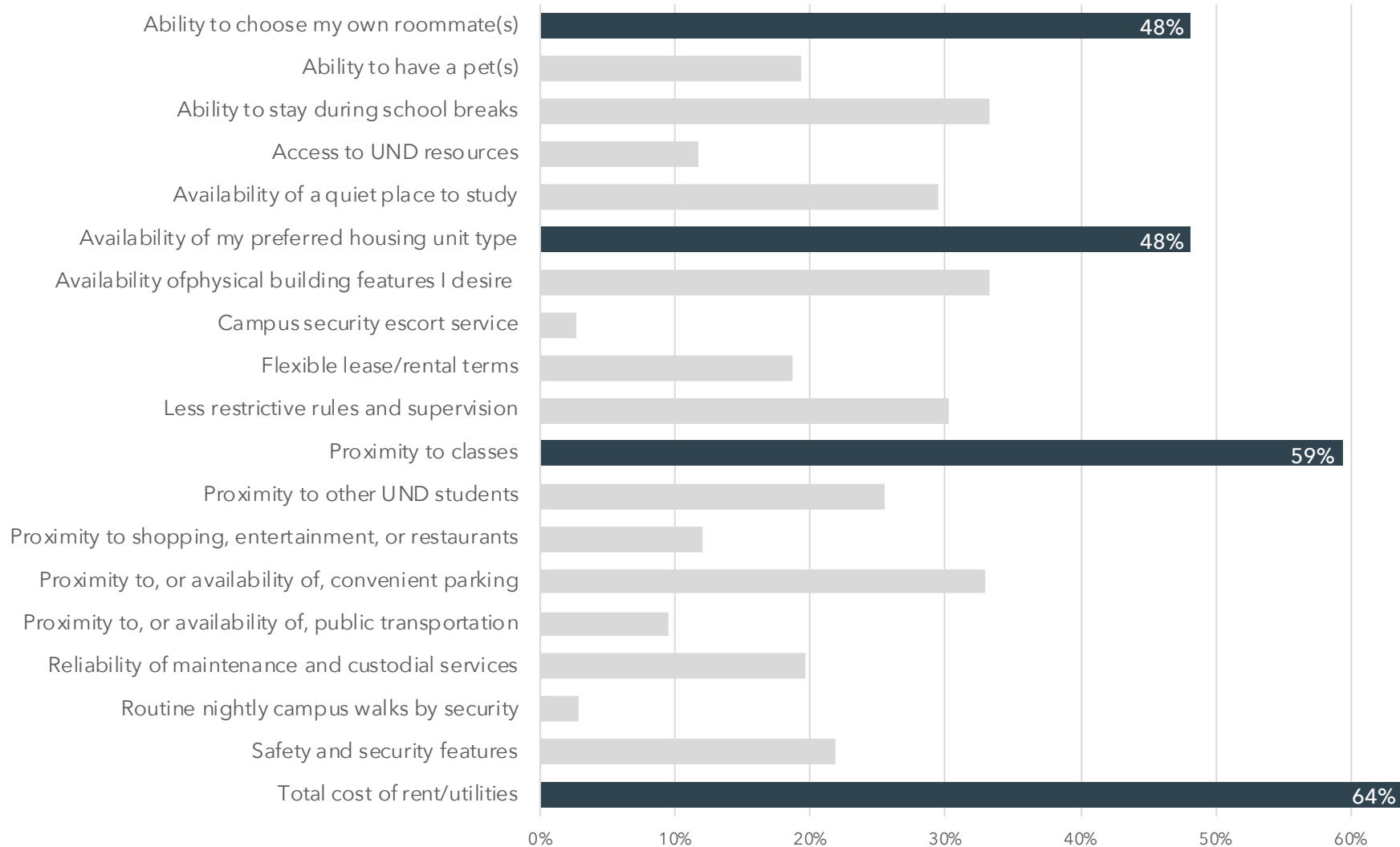
(RENT OR MORTGAGE INCLUDING TOTAL MONTHLY UTILITIES)



* (85% of apartment renters had 12+ month leases)

SECTION 1: CURRENT HOUSING - ALL RESPONDENTS

Think about why you made the decision to live where you do now. Please choose the following factors that were most important in your decision. Select all that apply.

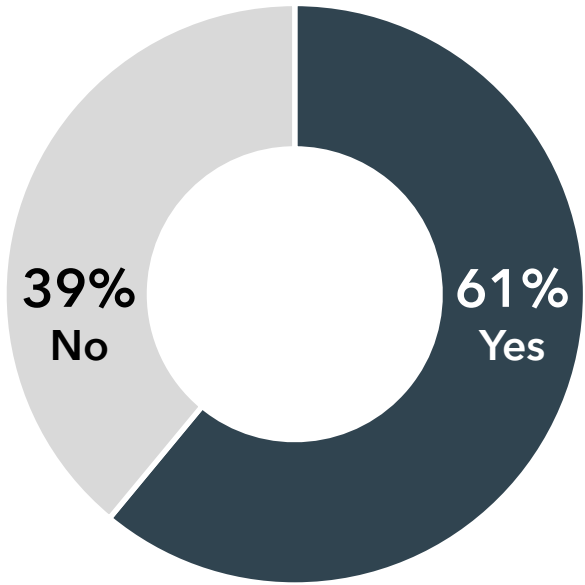


Respondents indicated the most important factors in deciding where to live were: ability to **choose roommates**, availability of **preferred housing unit** type, **proximity to classes**, and **total cost of rent/mortgage** and utilities.

SECTION 2: FUTURE HOUSING

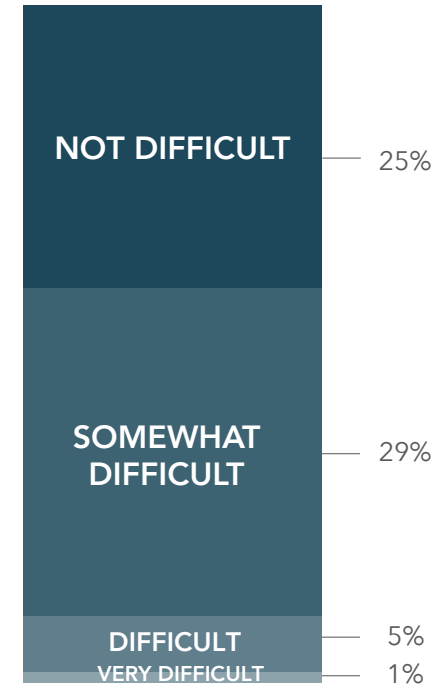
SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

Have you looked for new rental housing or housing to purchase in the Grand Forks/East Grand Forks area within the past 5 years?



About **61% of respondents** have looked for new housing in the past 5 years.

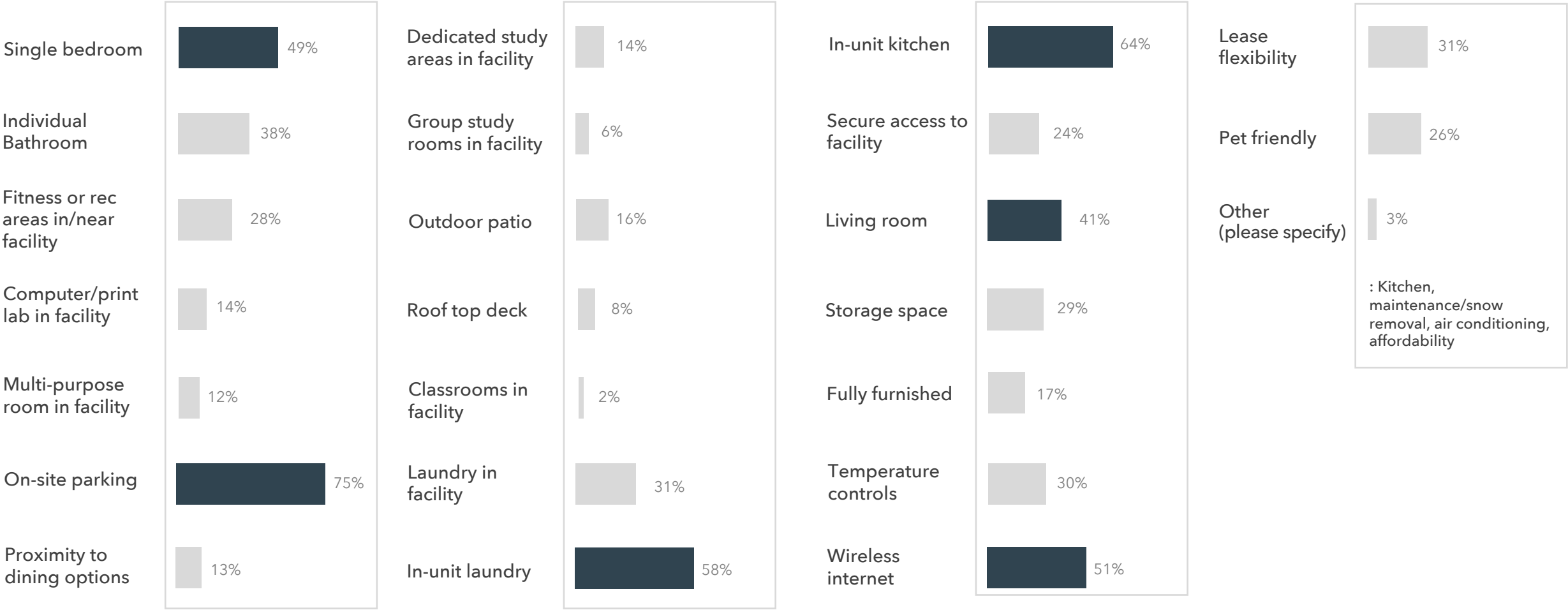
At the time of your last housing search, how difficult was it for you to find suitable housing in the Grand Forks/East Grand Forks area?



Of that 61% cohort, only **6% have experienced difficulty** finding suitable housing.

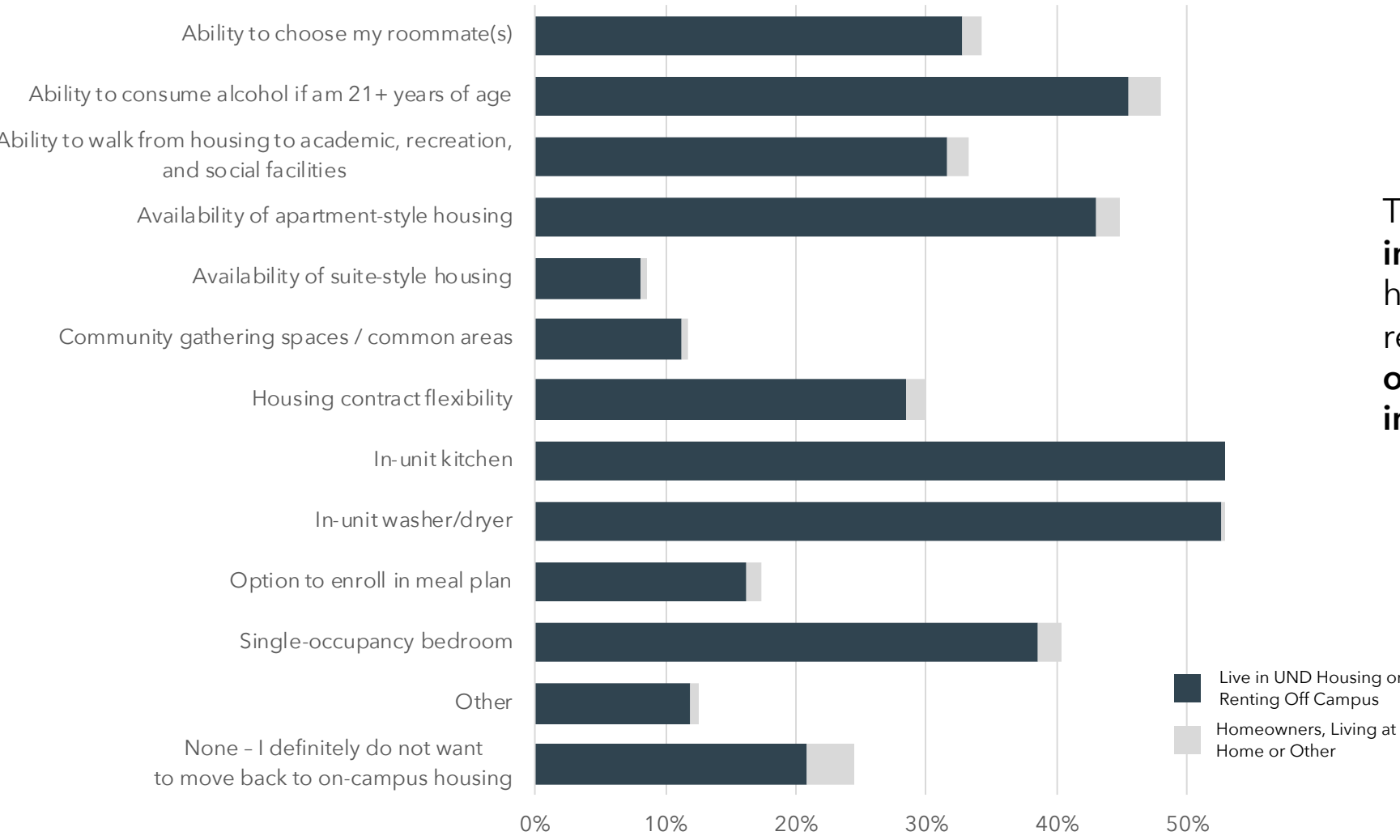
SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

Please select the residential features that are most important to you:



SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

If you currently live OFF CAMPUS or plan to in the future, what factors would make you consider moving closer to campus or into ON CAMPUS housing?

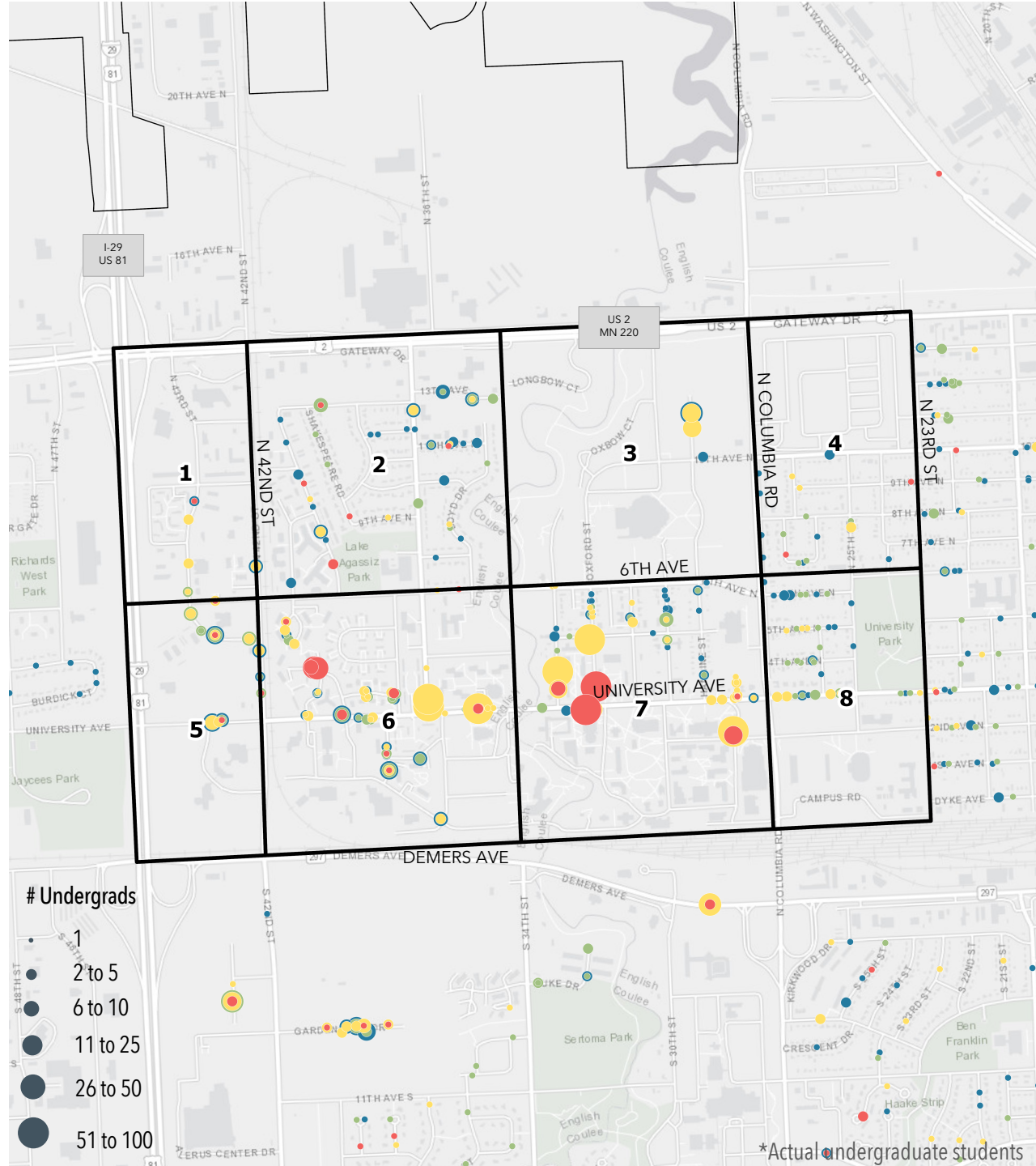
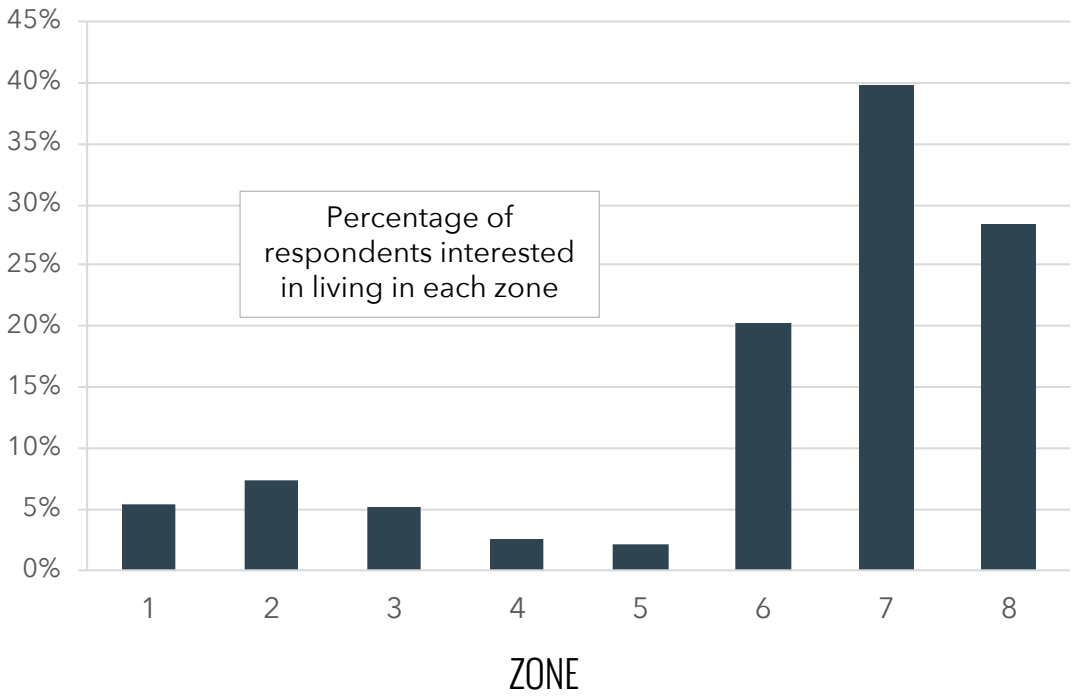


The most popular factors were **in-unit kitchens and laundry**, however undergraduate respondents considered **many of these factors similarly important.**

SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

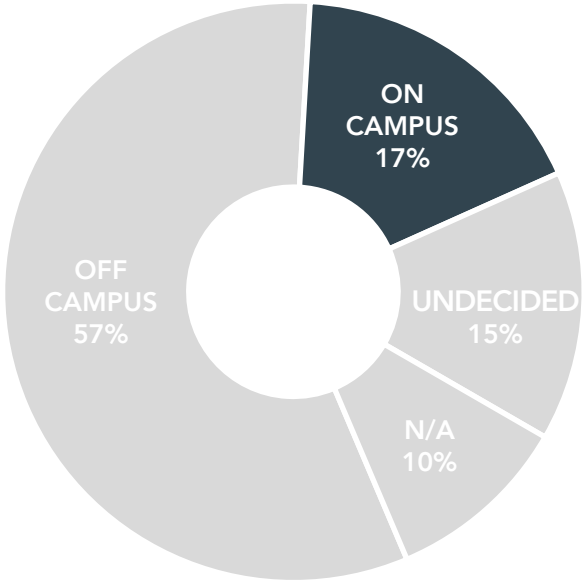
If considering living OFF CAMPUS next year, where would you prefer to do so? (SELECT ALL THAT APPLY)

Zone 7 held the most interest at **40%**, followed by zones 6 and 8. These zones fall along University Avenue and provide students the opportunity to be in close proximity to classes and dining.



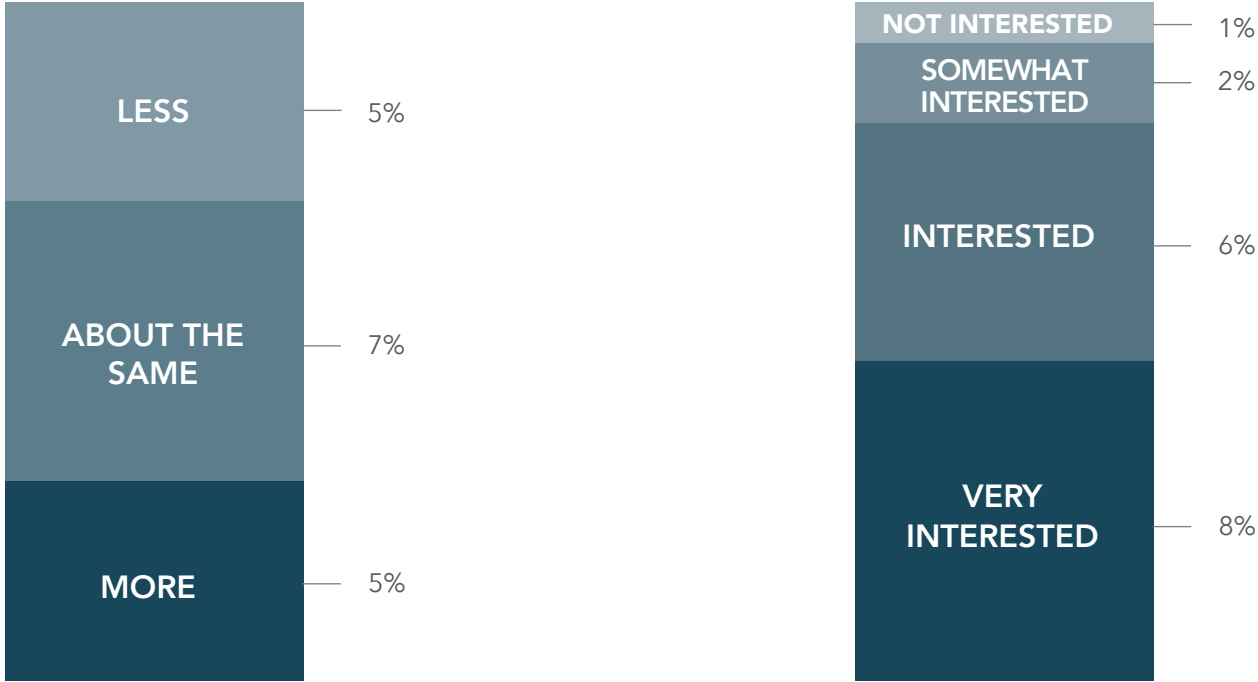
SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

Where do you plan to live next year?



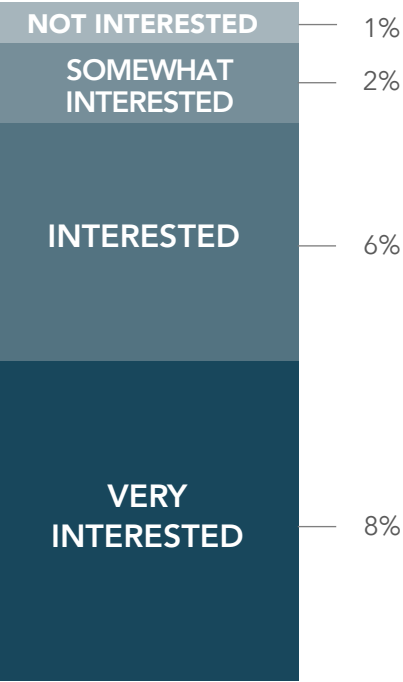
17% of respondents indicated they planned to live on campus next year.

Assuming there is a housing option that offers the top residential features you identified, would you be willing to pay more than the current rent/mortgage you currently pay?



Of that 17% cohort, 5% would be willing to pay more for a housing option that offered their desired amenities.

Assuming there is a building that offers the top residential features you identified and is located in your preferred on-campus area, how interested would you be in living there next year?

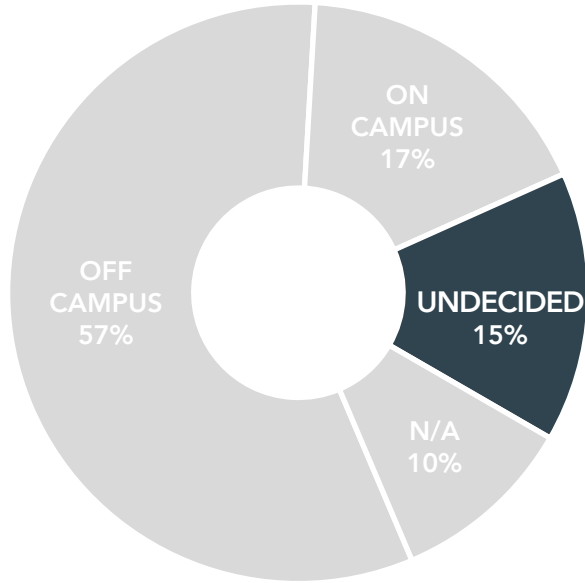


Of that 17% cohort, 14% would be interested in moving closer to campus for a housing option that offered their desired amenities.

We estimate this 14% equates to about 1,450 undergraduates

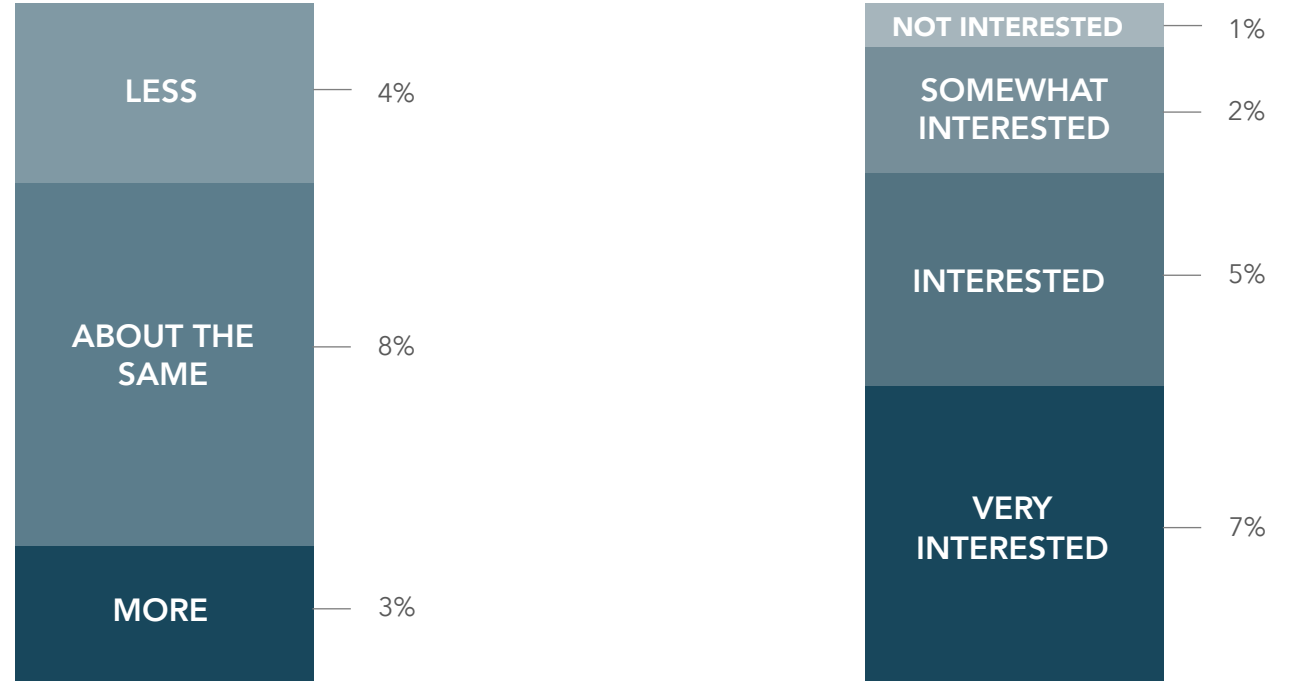
SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

Where do you plan to live next year?



15% of respondents indicated they were undecided on where to live next year.

Assuming there is a housing option that offers the top residential features you identified, would you be willing to pay more than the current rent/mortgage you currently pay?



Of that 15% cohort, 3% would be willing to pay more for a housing option that offered their desired amenities.

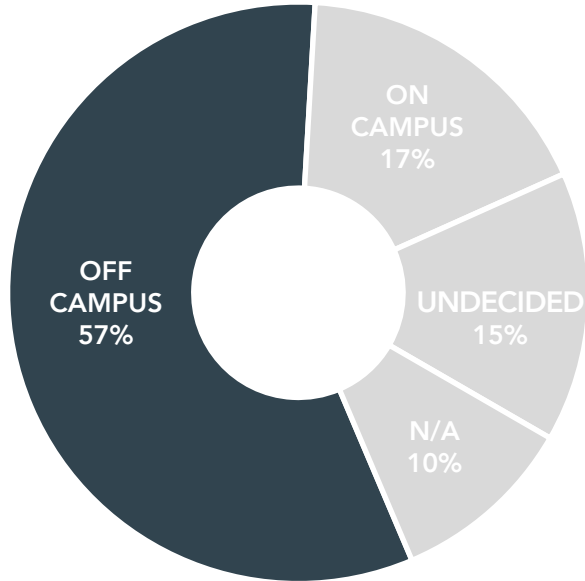
Assuming there is a building that offers the top residential features you identified and is located in your preferred on-campus area, how interested would you be in living there next year?

Of that 15% cohort, 12% would be interested in moving closer to campus for a housing option that offered their desired amenities.

We estimate this 12% equates to about 1,250 undergraduates

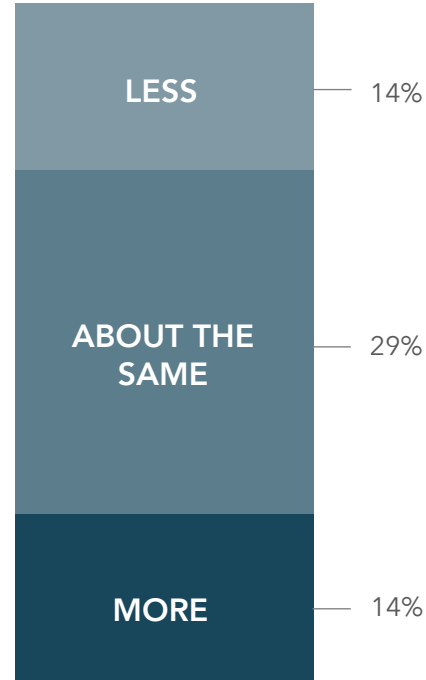
SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

Where do you plan to live next year?



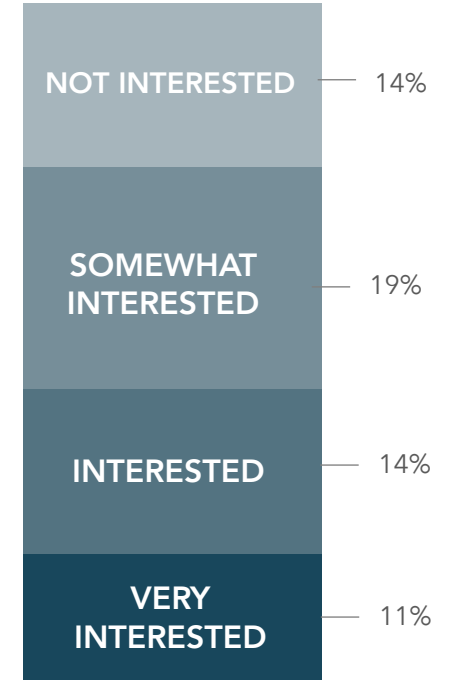
57% of respondents indicated they planned to live off campus next year.

Assuming there is a housing option that offers the top residential features you identified, would you be willing to pay more than the current rent/mortgage you currently pay?



Of that 57% cohort, 14% would be willing to pay more for a housing option that offered their desired amenities.

Assuming there is a building that offers the top residential features you identified and is located in your preferred on-campus area, how interested would you be in living there next year?



Of that 57% cohort, 25% would be interested in moving closer to campus for a housing option that offered their desired amenities.

We estimate this 25% equates to about 2,600 undergraduates

GRADUATE STUDENTS

GRADUATE RESPONDENTS

Population Profile



388
respondents



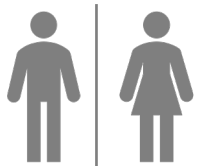
14%
walk to UND



20 - 24
median age
range



72%
commute to
UND by car

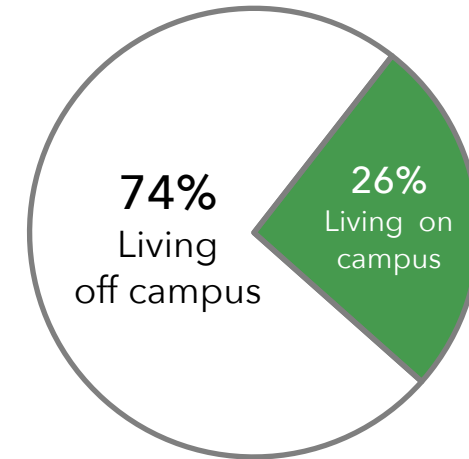


32% | 67%
Male | Female



86%
commute < 20
minutes to UND

Current Housing



Note: The on-campus respondent percentage (26%) is greater than the actual on-campus graduates at UND (7%).

GRADUATE KEY FINDINGS

Current Housing Satisfaction

- Though **65% of on-campus respondents are satisfied** with UND housing, **9%** find UND housing to be **unsatisfactory or very unsatisfactory** compared to other universities.
- Respondents indicated the most important factors in deciding where to live were **availability of preferred housing unit type** and **total cost of rent/mortgage** and utilities.

Current Housing Arrangements

- **26% of respondents** indicated they **live on campus**. **50% rent off-campus** and **16% are homeowners**. The remaining respondents either live with their families or have another living situation.
- **1st years were most likely** to live in UND housing. On campus residence tends to decrease as students progress through their programs.
- **52% of off-campus respondents indicated** they lived in a **low-rise apartment or condo**, while **34%** reported living in a **single-family house**.
- Though living with spouses (with or without children) was the most popular response at 48% , we see that **24% of off-campus respondents live with roommates** and **22% live alone**. **50%** of respondents **do not share a bedroom** with another person.

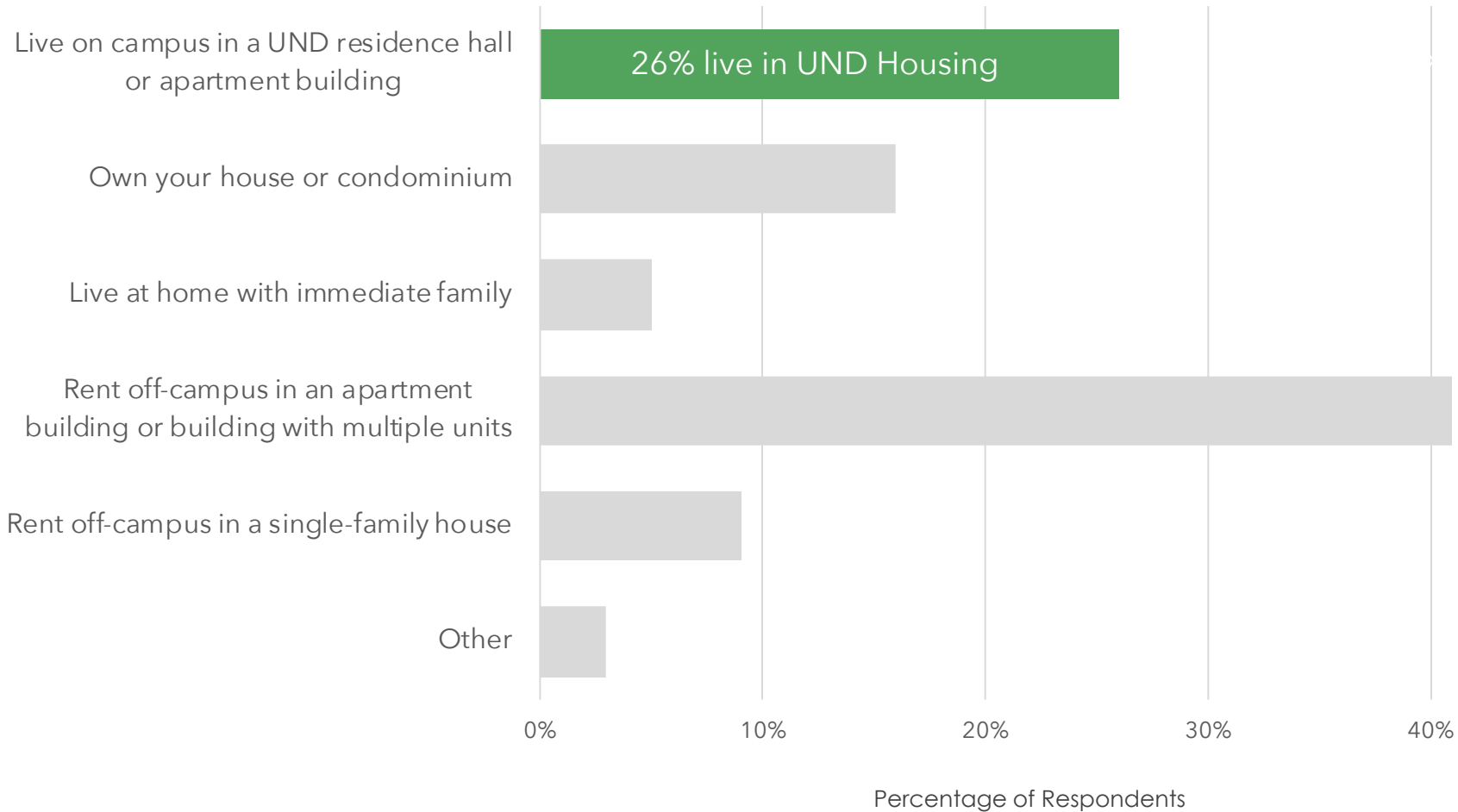
Future Housing Preferences

- About **59% of respondents have looked for new housing** in the past 5 years. Of that 59% cohort, only **7% have experienced difficulty** finding suitable housing.
- **13% of respondents** indicated they **were undecided** on where to live next year. Of that cohort, **10% would consider moving closer to campus** for a housing option that offered their desired amenities (this is approx. 330 grad students).
- **54% of respondents** indicated they **planned to live off campus** next year. Of that cohort, **20% would consider moving closer to campus** for a housing option that offered their desired amenities (this is approx. 660 grad students).
- **Top 5 Most Desired Housing Features:** in-unit kitchen, on-site parking, in-room wireless internet, individual bathroom, in-unit washer/dryer

SECTION 1: CURRENT HOUSING

SECTION 1: CURRENT HOUSING - ALL RESPONDENTS

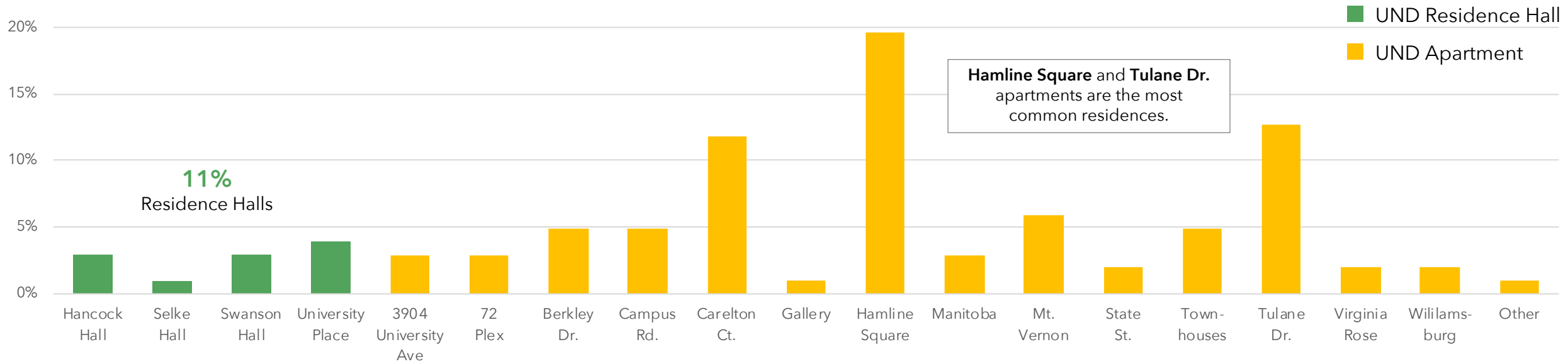
Please indicate your current housing status.



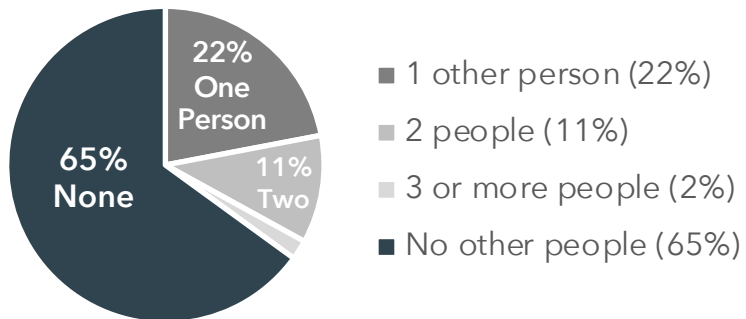
26% of respondents indicated they **live on campus** in UND housing. **50% rent off-campus** and **16% are homeowners**. The remaining respondents either live with their families, are homeowners, or have another living situation.

SECTION 1A: CURRENT HOUSING - ON CAMPUS RESPONDENTS

Where do you currently live on campus?



How many people do you share a bedroom with?

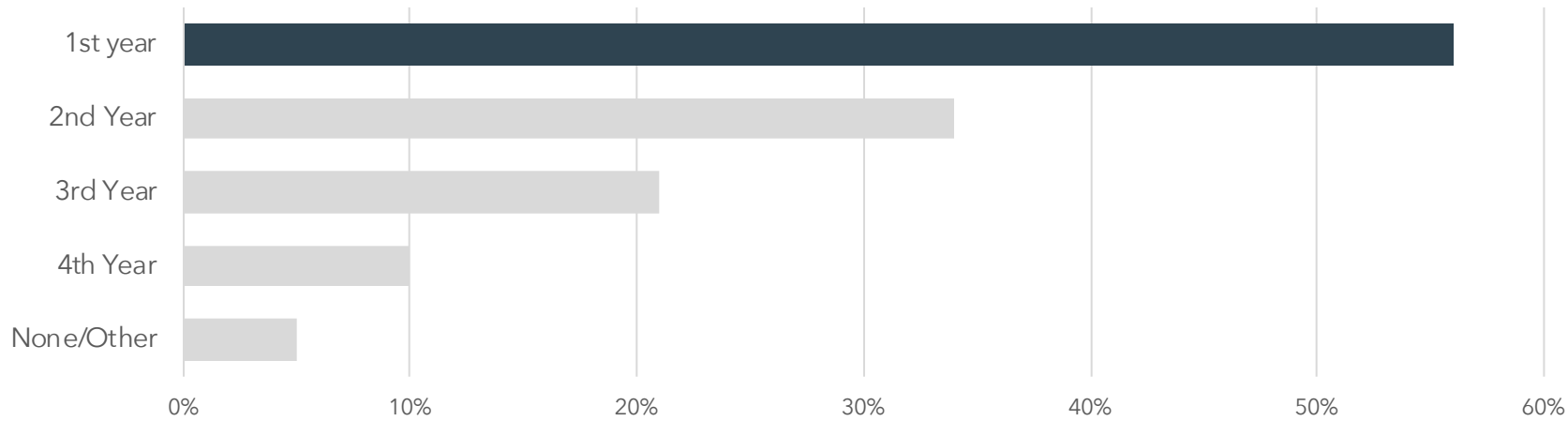


On-campus residents: **11%** of on-campus respondents **live in UND Residence Halls**, while **81%** live in **UND Apartments**.

65% have **single-occupancy** bedrooms.

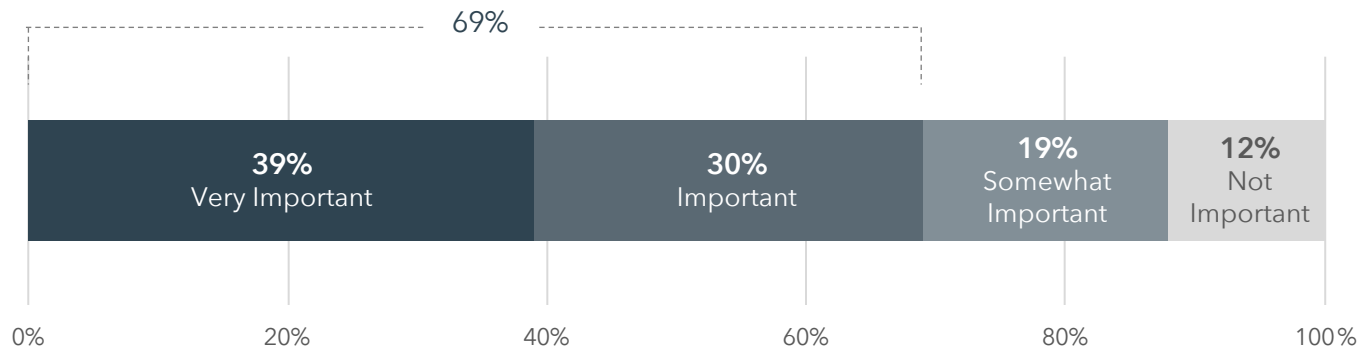
SECTION 1A: CURRENT HOUSING - ON CAMPUS RESPONDENTS

Which years of graduate/professional school have you lived in UND housing?



1st years were most likely to live in UND housing. On campus residence tends to decrease as students progress through their programs.

How important was the availability of on-campus housing in your decision to attend UND?



69% of on-campus students indicated the **availability of on-campus housing** was an **important factor** in deciding to attend UND.

SECTION 1A: CURRENT HOUSING - ON CAMPUS RESPONDENTS

Please indicate which statements below describe your experience in UND housing.

Helped me acclimate to life at UND



Provided me with a sense of community



Had a positive influence on my academic performance



Encouraged me to be more active in student life on campus



Provided me with leadership opportunities



Feel connected to my residence hall



Introduced me to new friends



Provided me with a safe environment



Was a convenient living option



Helped me learn about people different than me



Exposed me to intellectual, cultural and social activities



Enhanced my overall experience at UND



Offered meaningful interaction with UND Faculty



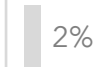
Created an environment for interaction with faculty



My on-campus housing experience has made me more apt to support the University after graduation



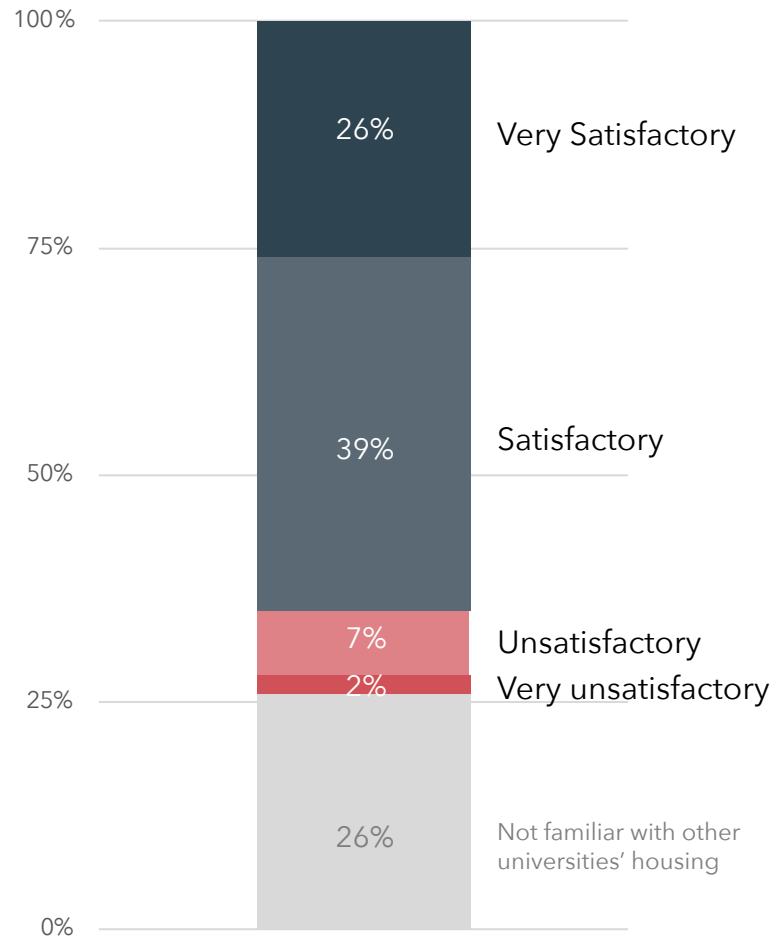
I did not enjoy/did not value my on-campus living experience



Over 40% of respondents

SECTION 1A: CURRENT HOUSING - ON CAMPUS RESPONDENTS

Compared to housing at other universities that you are familiar with, how would you rate your impression of UND housing?



Though **65% of respondents are satisfied** with UND housing, **9% of on campus respondents** find UND housing to be **unsatisfactory or very unsatisfactory** compared to other universities.

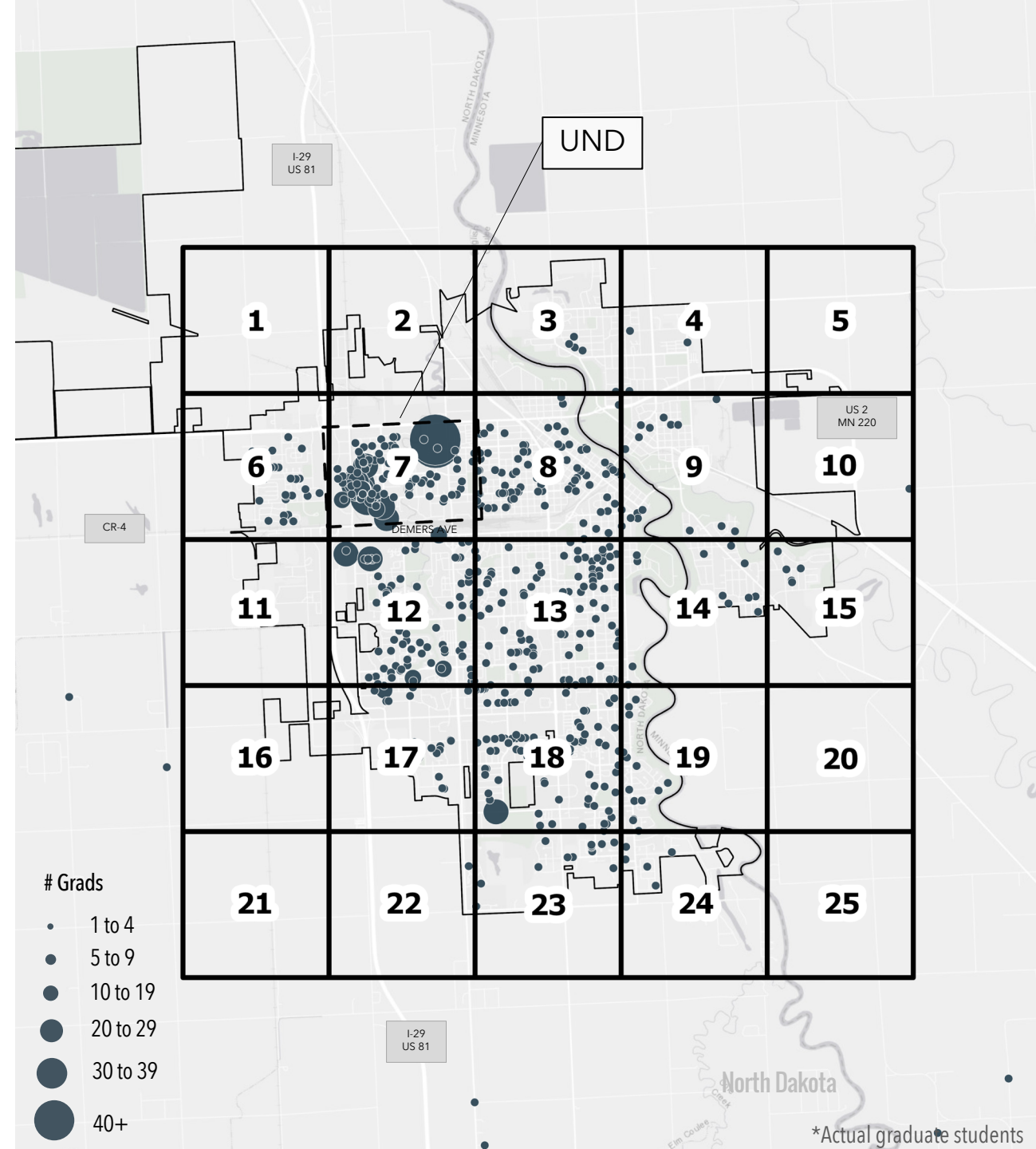
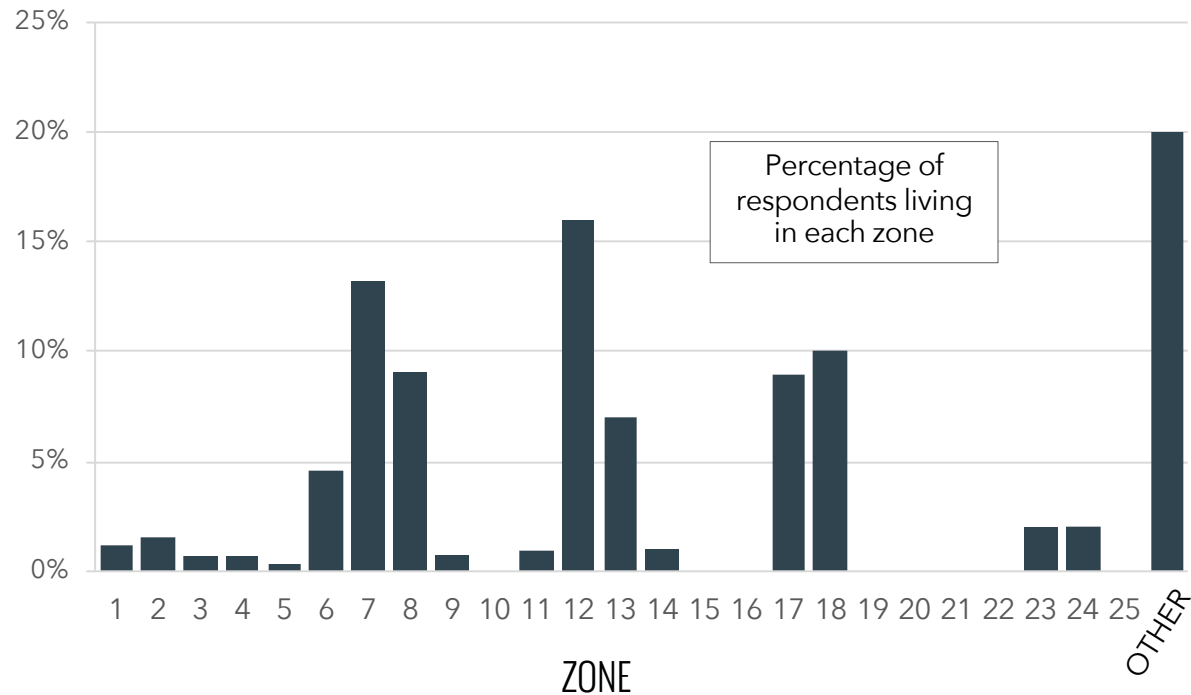
University Housing that respondents are most familiar with:

North Dakota State University
 University of Minnesota
 University of Minnesota Duluth
 University of Wyoming
 Concordia College

SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

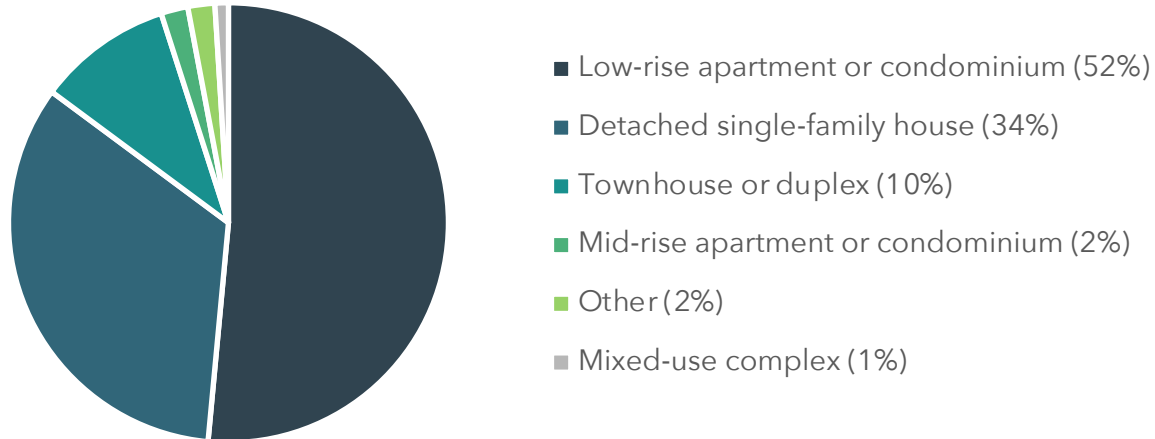
Please select the zone where you reside.

The majority of **off-campus** respondents reside in the **zones in close proximity to UND campus (7, 8, 12, 13)**. However, **20% of respondents live outside of these zones** altogether.



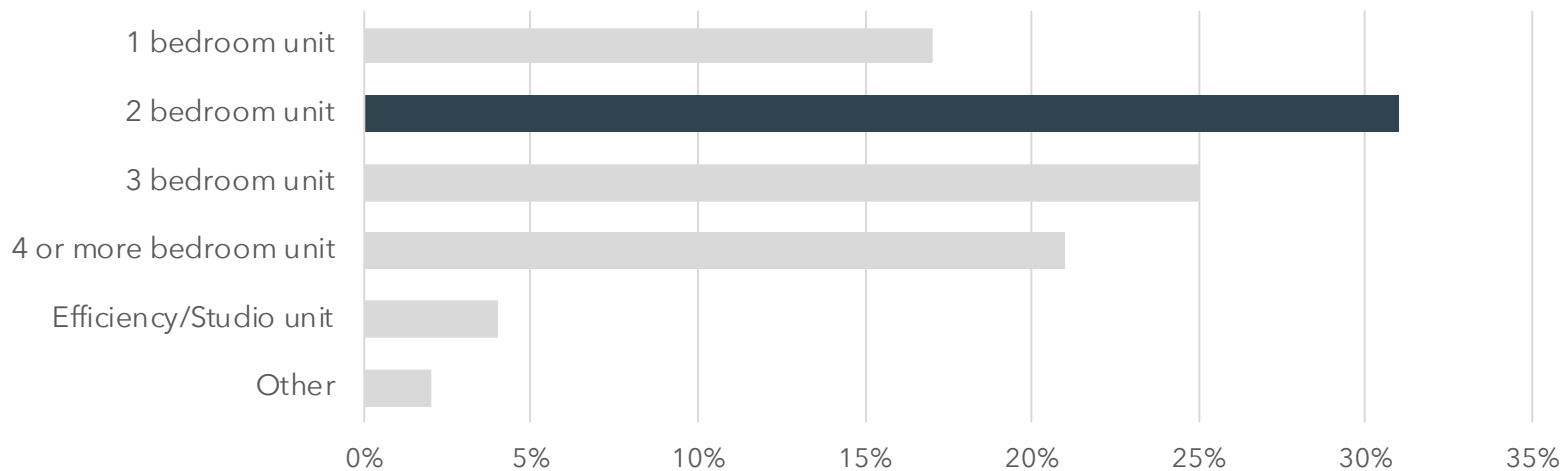
SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

Please indicate your current housing type.



52% of respondents indicated they lived in a low-rise apartment or condo, while 34% reported living in a single-family house.

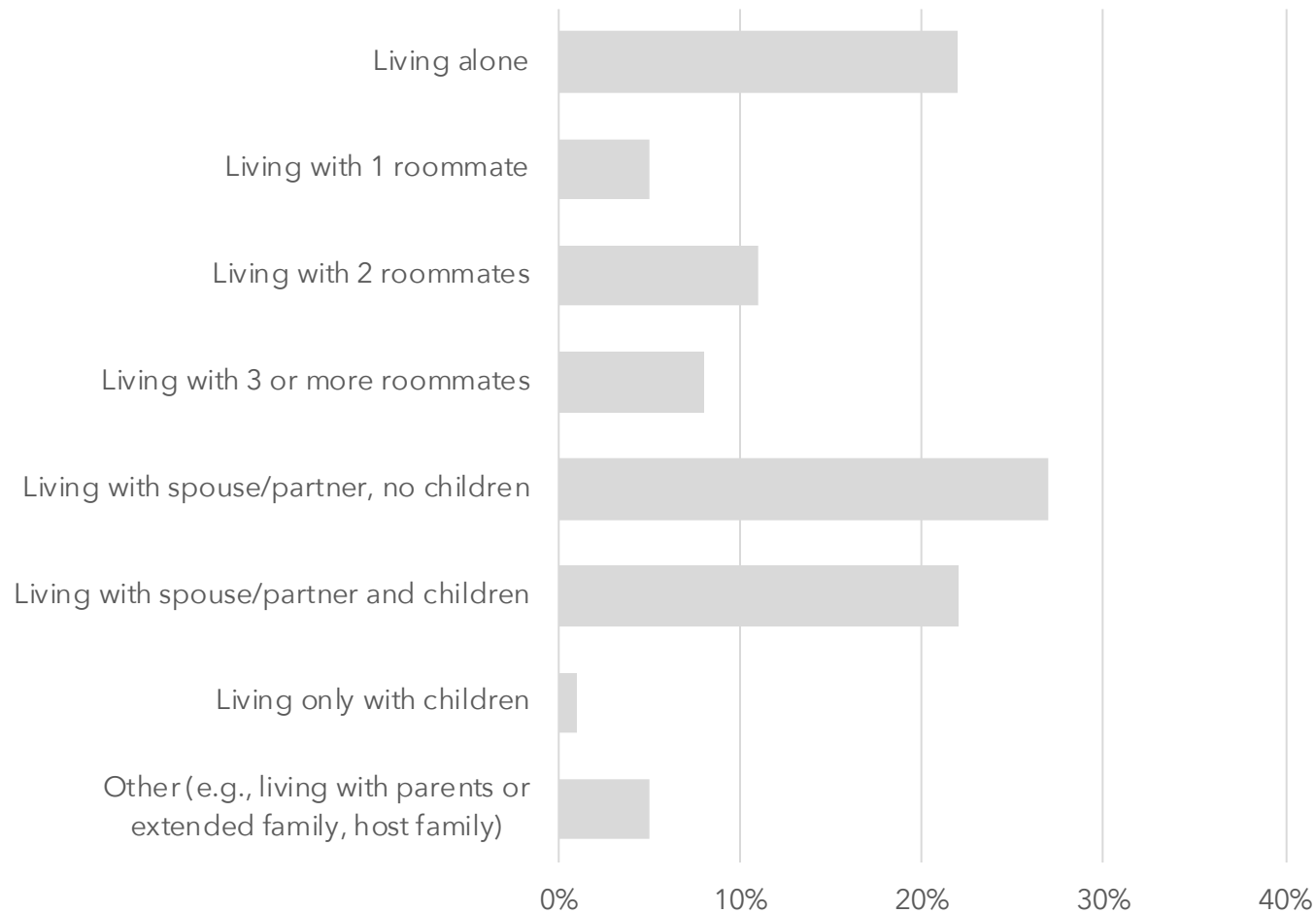
Please indicate your current unit type.



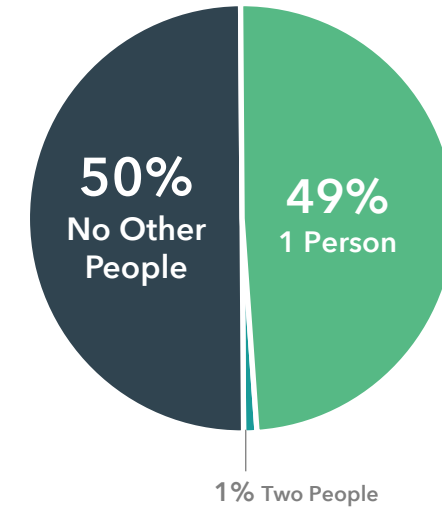
2-bedroom units were the most common housing unit type (31%). The remaining respondents indicated a steady mix of 1, 3, and 4-bedroom units.

SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

Please describe your current living situation.



How many people do you share a bedroom with?

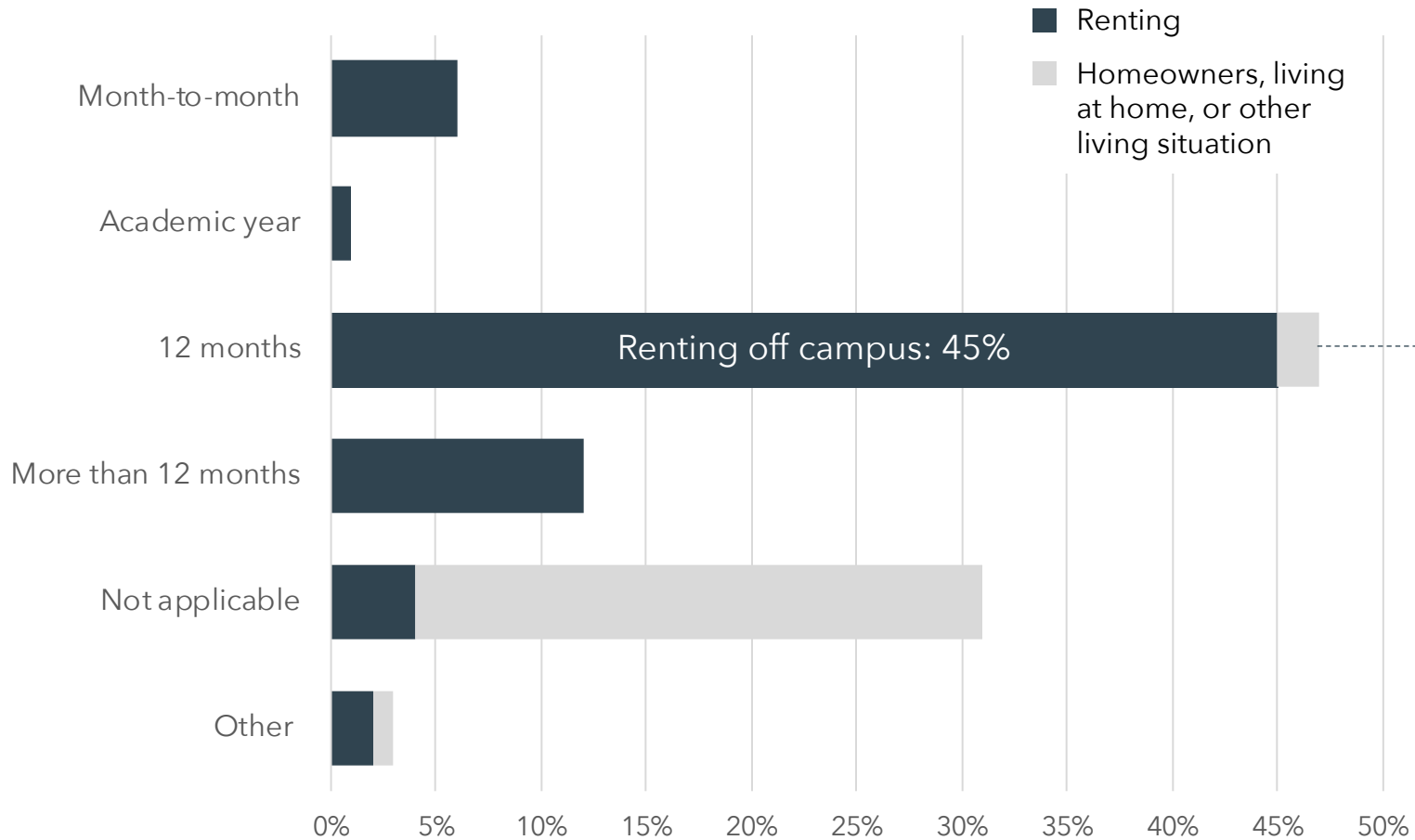


Though living with spouses (with or without children) was the most popular response at 27%, we see that **24% of off-campus respondents have roommates** and **22% live alone**.

50% of respondents do not share a bedroom with another person. Of the 49% that do, **47% happen to be married or partnered**.

SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

How long is your current lease?

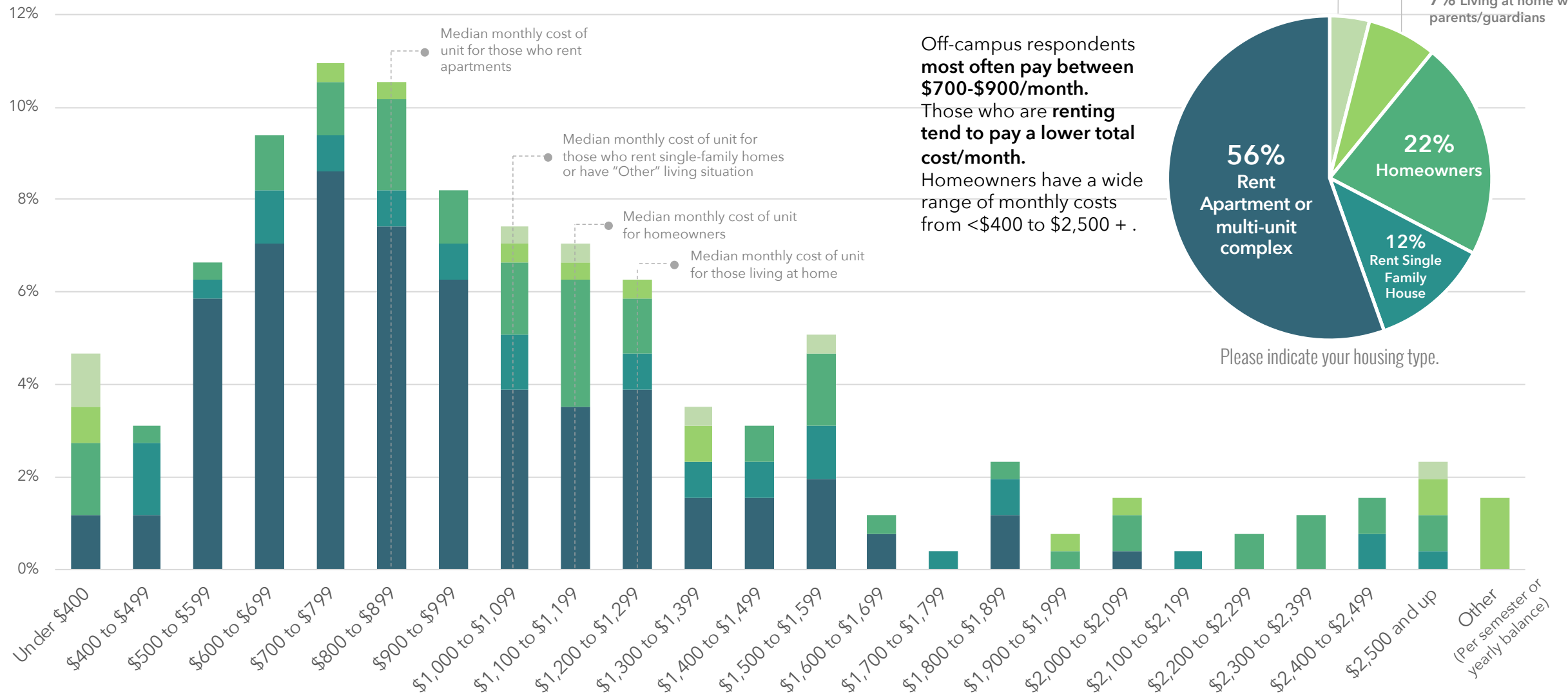


47% of off-campus respondents have **12-month leases**. Those that do not have leases are **typically homeowners**, living at home, or have another living situation.

SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

How much is the total monthly rent or mortgage of your apartment, condominium, or house?

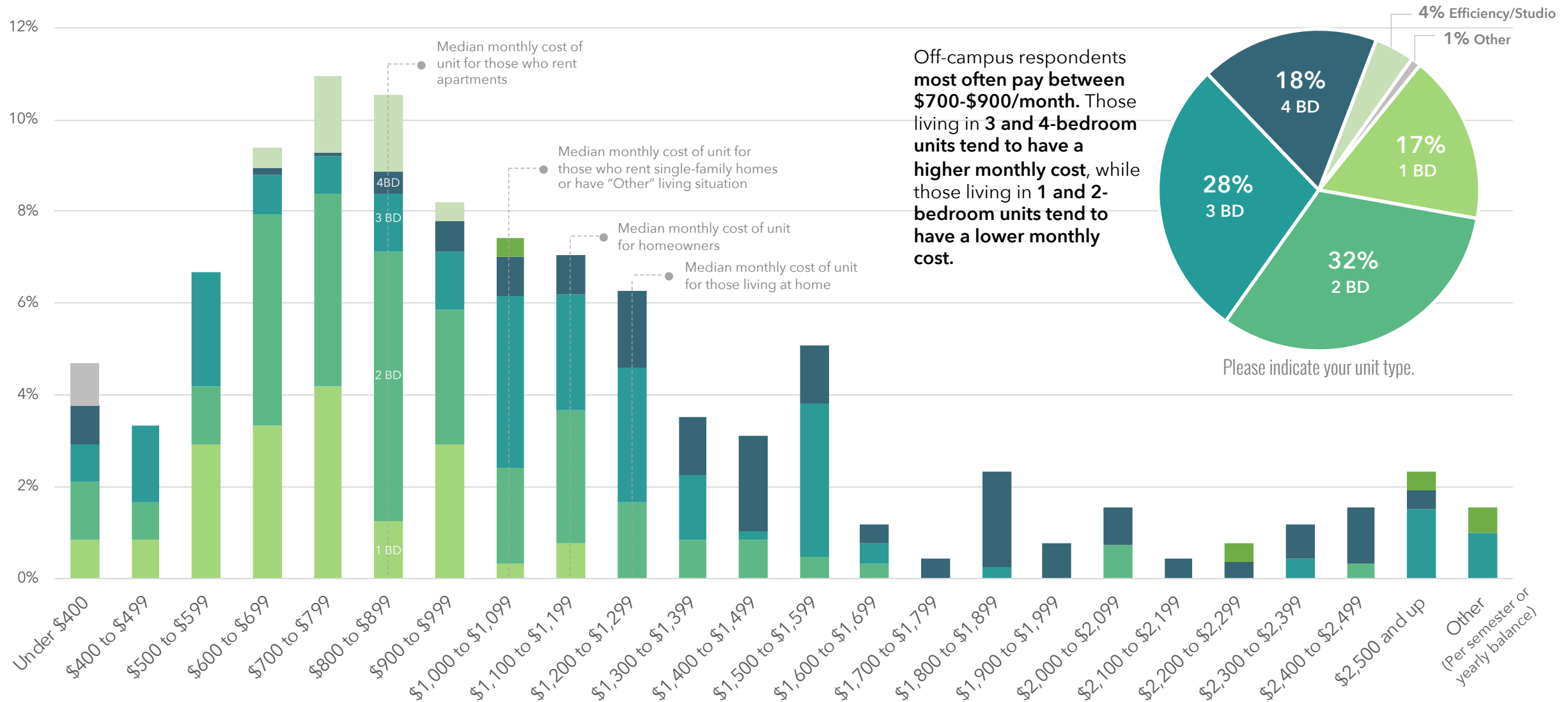
(If you pay a mortgage, please include insurance, taxes and/or condo fee. If you have roommates, please list the total cost of the unit.)



SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

How much is the total monthly rent or mortgage of your apartment, condominium, or house?

(If you pay a mortgage, please include insurance, taxes and/or condo fee. If you have roommates, please list the total cost of the unit.)



SECTION 1B: CURRENT HOUSING - OFF CAMPUS RESPONDENTS

Describe one or two features of your current housing situation that you particularly like:

: "Garage and all utilities included, except electricity"

: "It's a duplex, so it is like having a house. I can have my dog there. It's quiet and has a yard."

: "Walking distance to campus, great price."

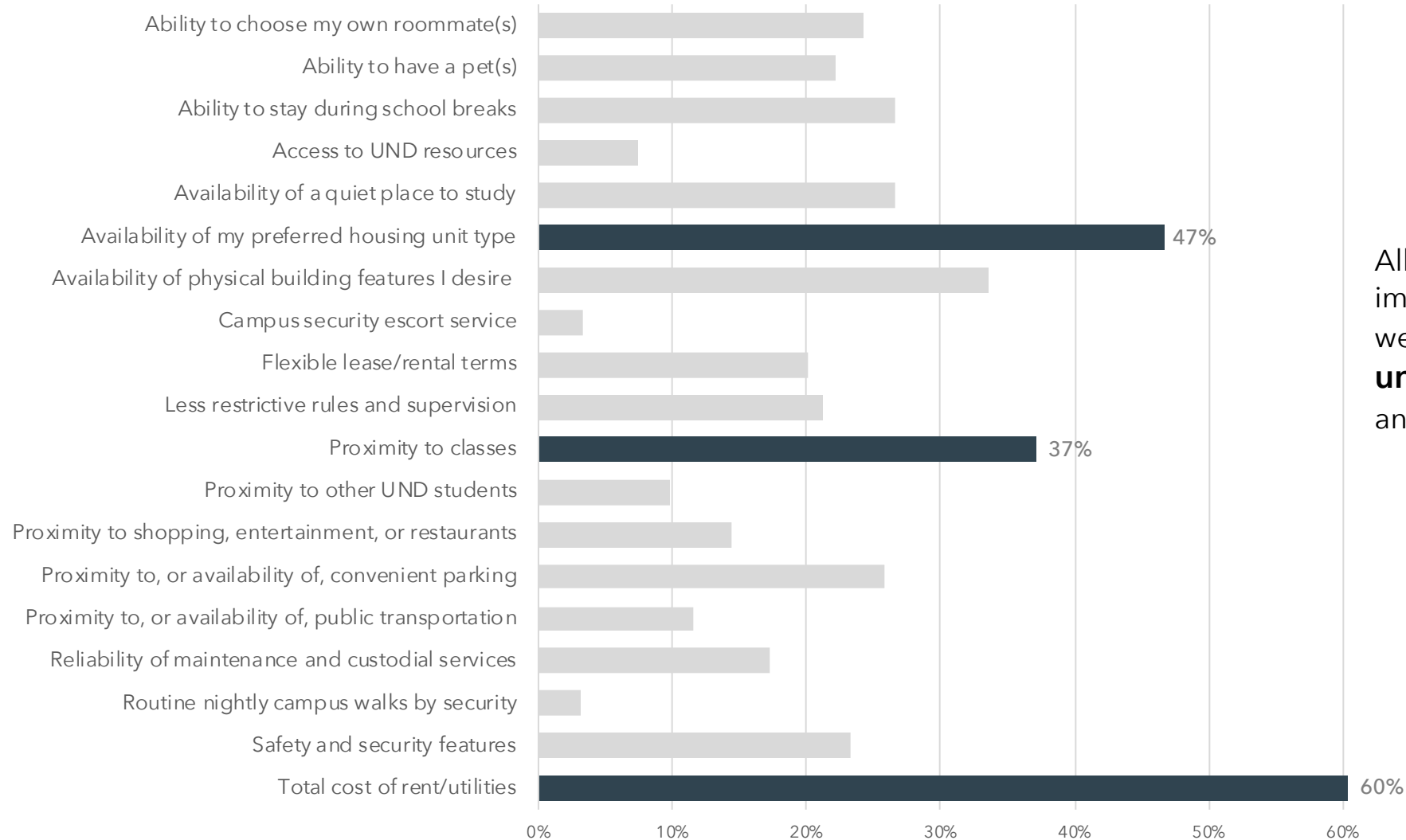
: "Big kitchen, multiple bathrooms"

: "In-unit laundry and heated parking garage"



SECTION 1: CURRENT HOUSING - ALL RESPONDENTS

Think about why you made the decision to live where you do now. Please choose the following factors that were most important in your decision. Select all that apply.

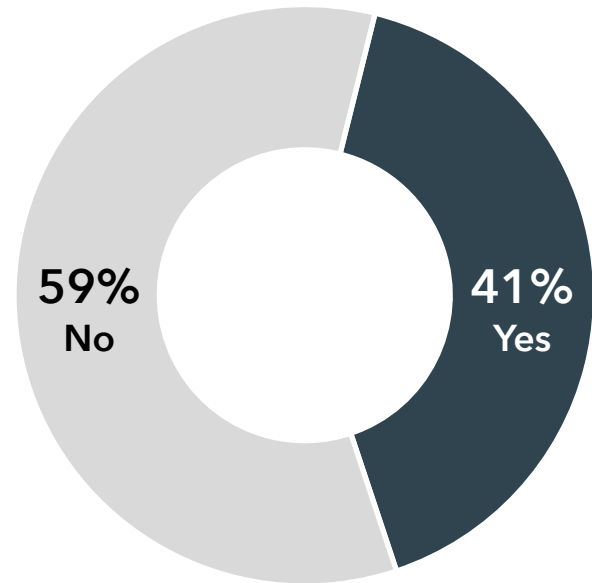


All respondents indicated the most important factors in deciding where to live were: availability of **preferred housing unit type**, **total cost of rent/mortgage and utilities**, and **proximity to classes**.

SECTION 2: FUTURE HOUSING

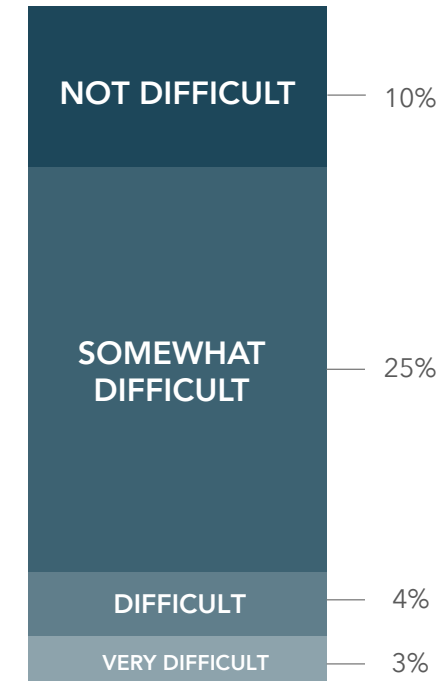
SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

Have you looked for new rental housing or housing to purchase in the Grand Forks/East Grand Forks area within the past 5 years?



About **59% of respondents** have looked for new housing in the past 5 years.

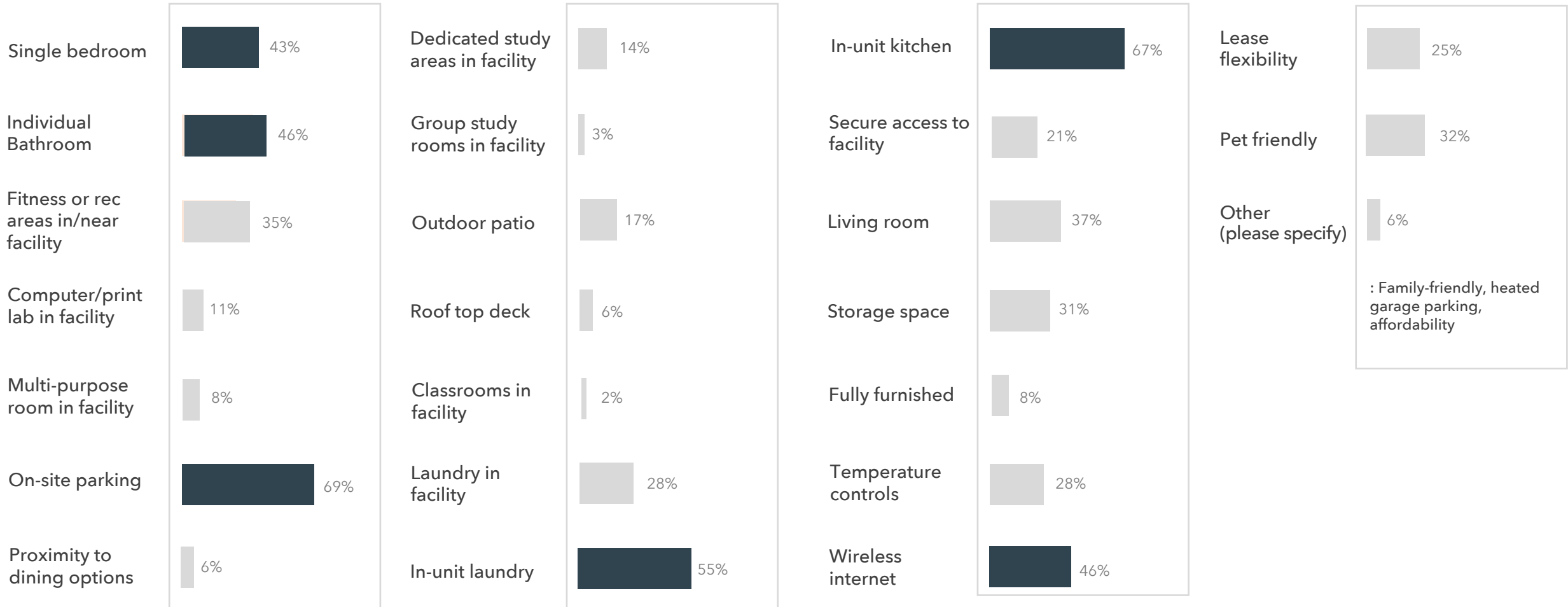
At the time of your last housing search, how difficult was it for you to find suitable housing in the Grand Forks/East Grand Forks area?



Of that 59% cohort, only **7% have experienced difficulty** finding suitable housing.

SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

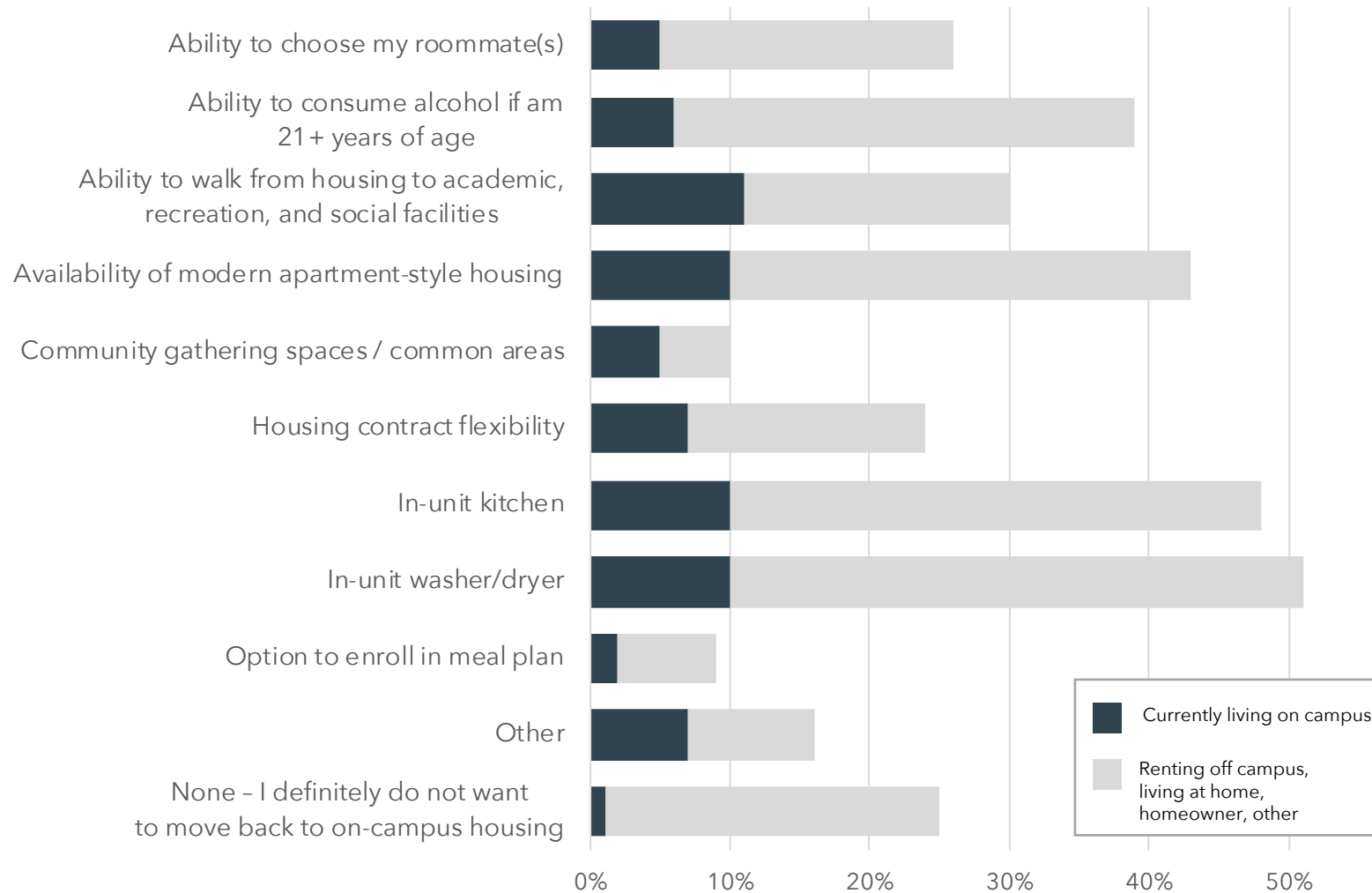
Please select the residential features that are most important to you:



Over 40% of respondents

SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

If you currently live **OFF CAMPUS** or plan to in the future, what factors would make you consider moving closer to campus or into **ON CAMPUS** housing?



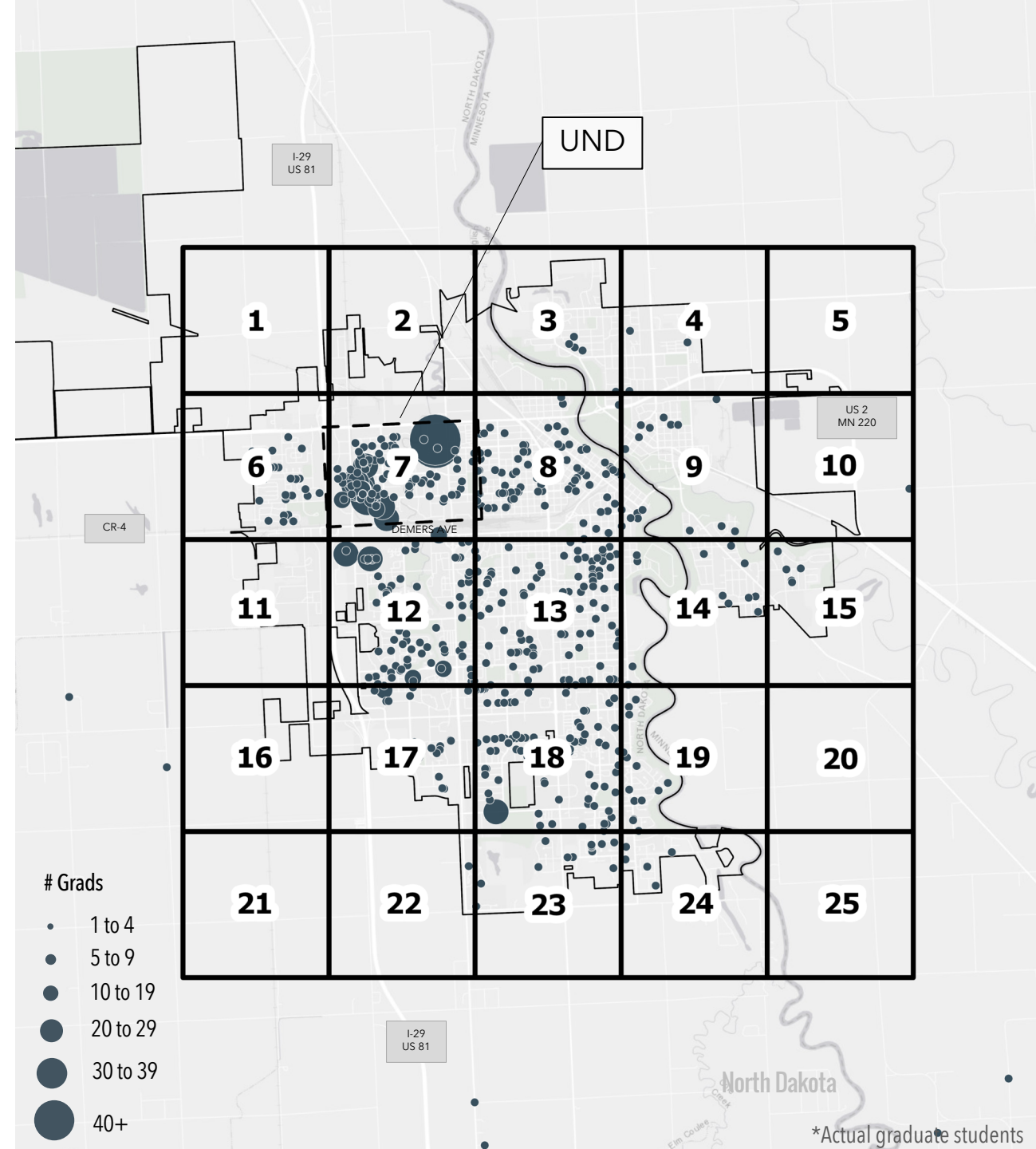
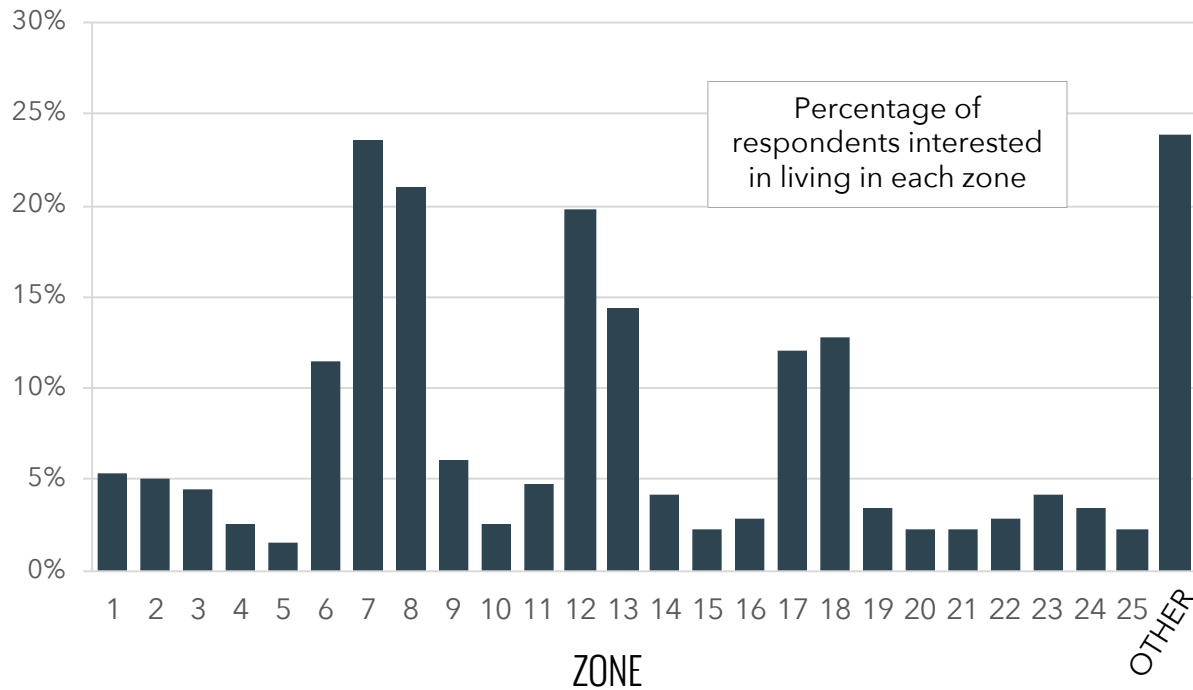
The most popular factors were **in-unit kitchens and laundry**, followed by **modern apartment-style housing** and ability to **consume alcohol** if 21+ years old.

Option to enroll in meal plans and having community gathering spaces were less favorable, however **walkability to academic, recreation, and social facilities** was important.

SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

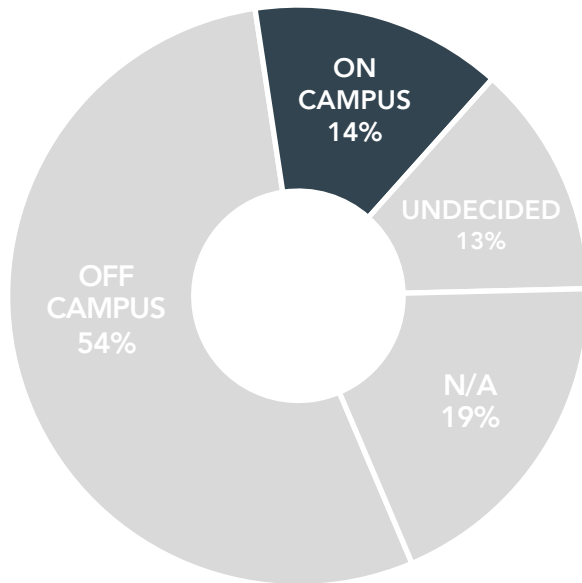
If considering living OFF CAMPUS next year, where would you prefer to do so? (SELECT ALL THAT APPLY)

The majority of respondents show interest in the zones that are close to UND campus (7, 8, 12, 13). However, 24% of respondents preferred areas outside of these zones altogether.



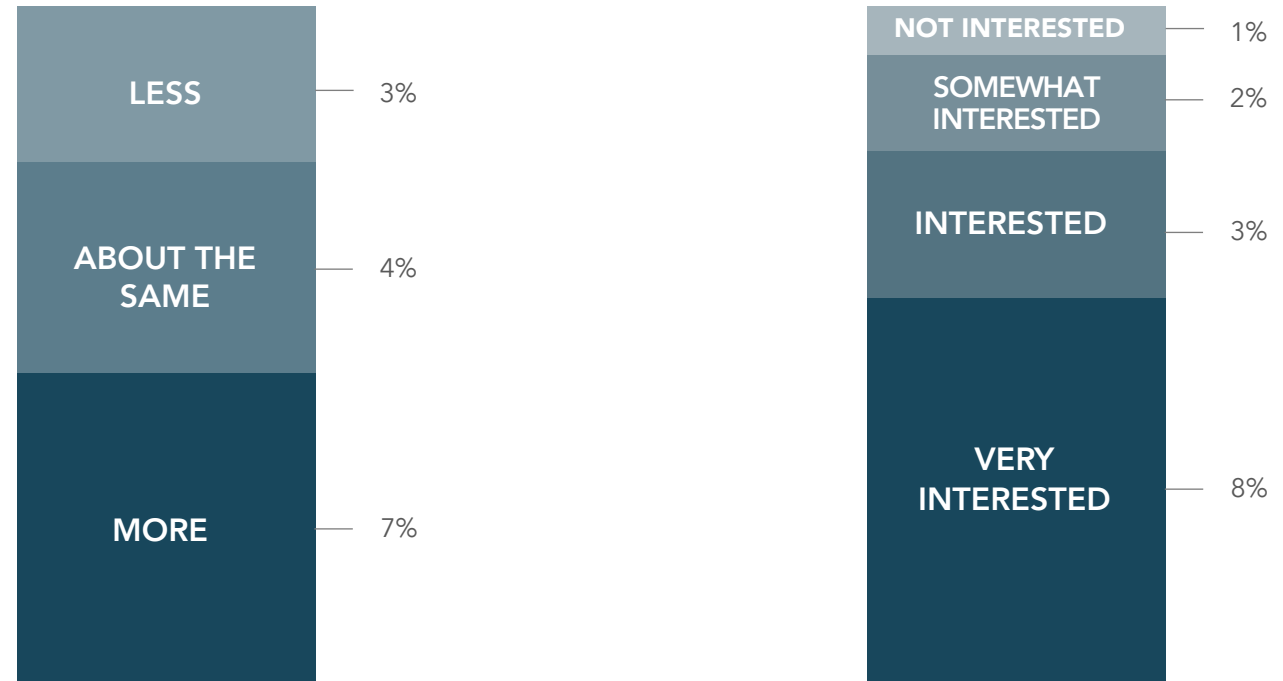
SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

Where do you plan to live next year?



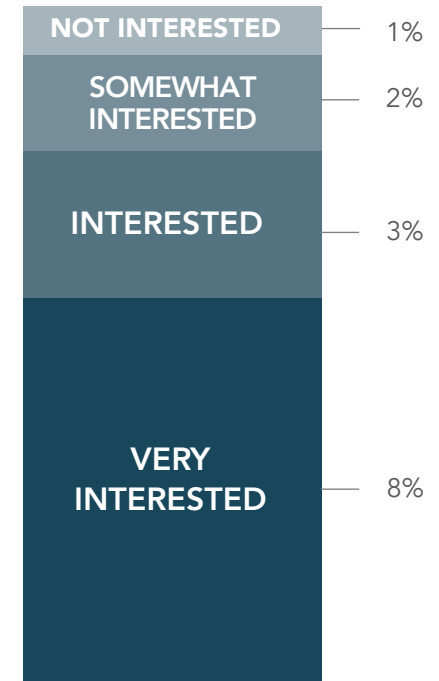
14% of respondents indicated they planned to live on campus next year.

Assuming there is a housing option that offers the top residential features you identified, would you be willing to pay more than the current rent/mortgage you currently pay?



Of that 14% cohort, 7% would be willing to pay more for a housing option that offered their desired amenities.

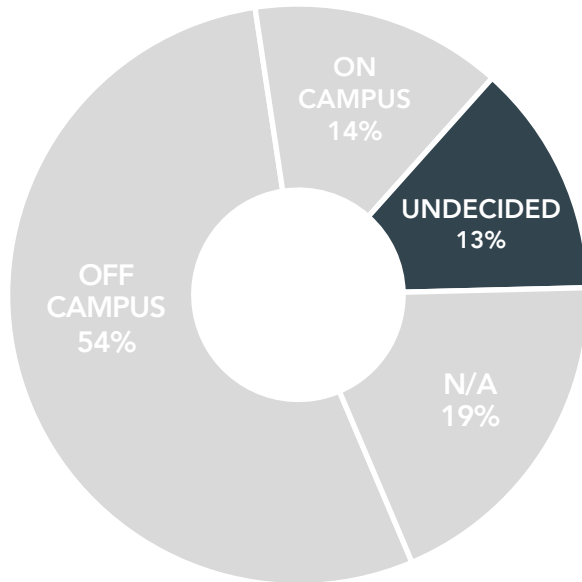
Assuming there is a building that offers the top residential features you identified and is located in your preferred on-campus area, how interested would you be in living there next year?



Of that 14% cohort, 11% would be interested in moving closer to campus for a housing option that offered their desired amenities.

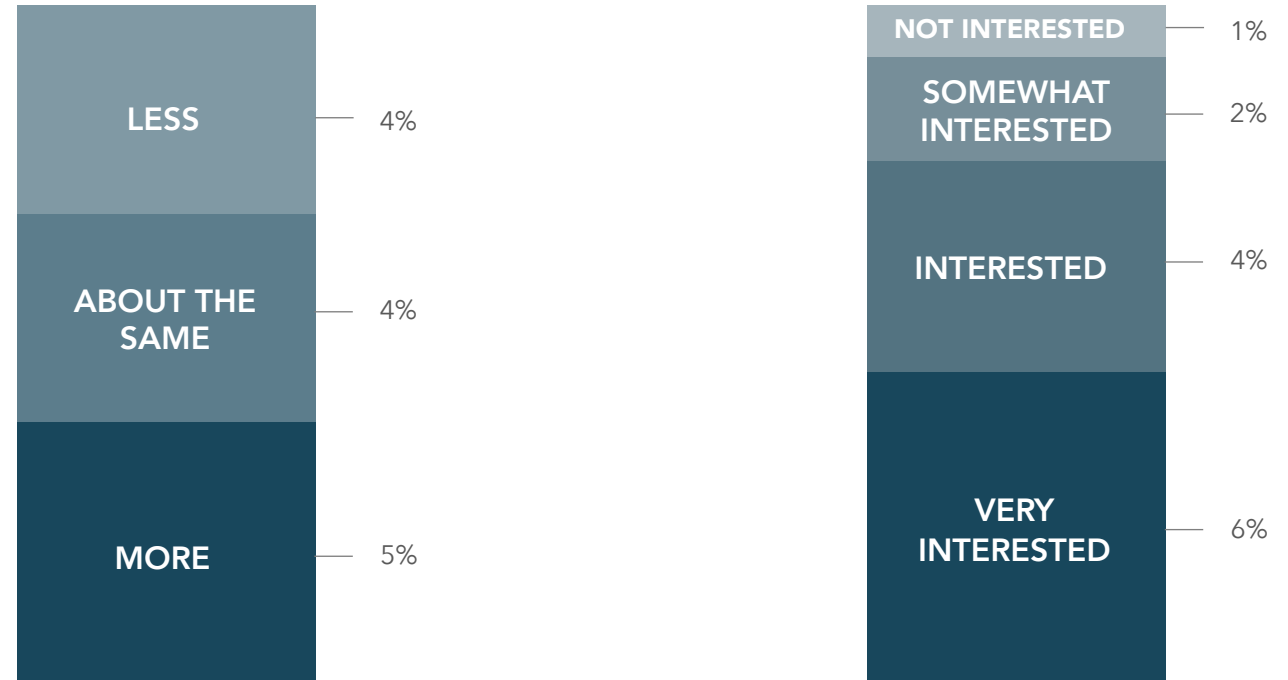
SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

Where do you plan to live next year?



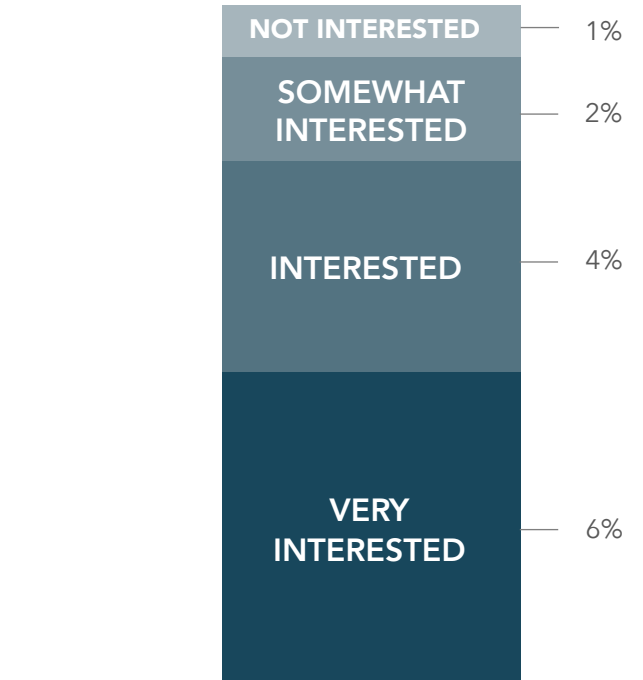
13% of respondents indicated they were undecided on where to live next year.

Assuming there is a housing option that offers the top residential features you identified, would you be willing to pay more than the current rent/mortgage you currently pay?



Of that 13% cohort, 5% would be willing to pay more for a housing option that offered their desired amenities.

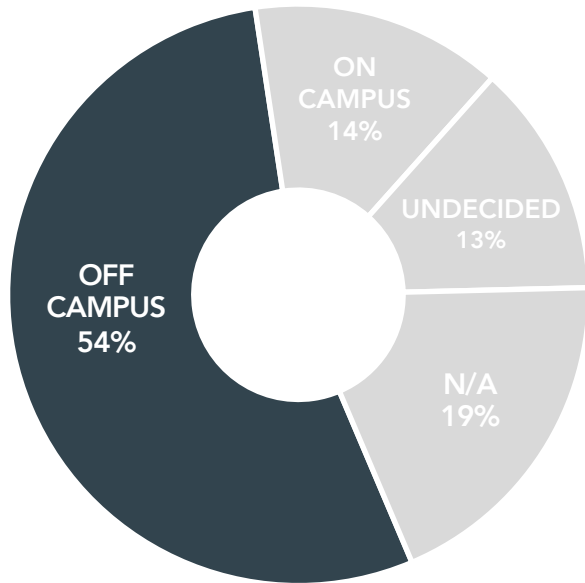
Assuming there is a building that offers the top residential features you identified and is located in your preferred on-campus area, how interested would you be in living there next year?



Of that 13% cohort, 10% would be interested in moving closer to campus for a housing option that offered their desired amenities.

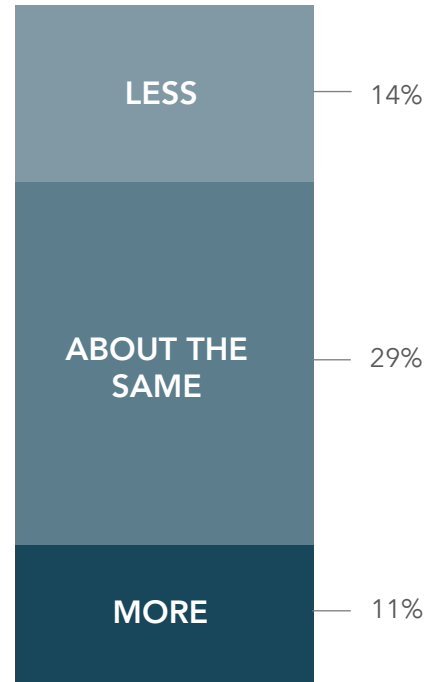
SECTION 2: FUTURE HOUSING - ALL RESPONDENTS

Where do you plan to live next year?



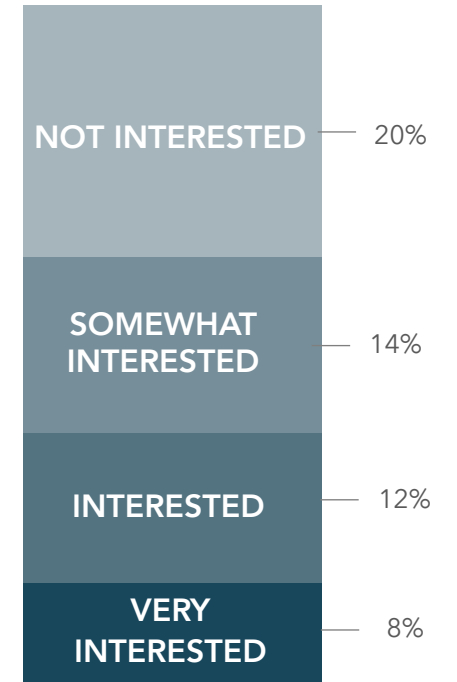
54% of respondents indicated they planned to live off campus next year.

Assuming there is a housing option that offers the top residential features you identified, would you be willing to pay more than the current rent/mortgage you currently pay?



Of that 54% cohort, 11% would be willing to pay more for a housing option that offered their desired amenities.

Assuming there is a building that offers the top residential features you identified and is located in your preferred on-campus area, how interested would you be in living there next year?



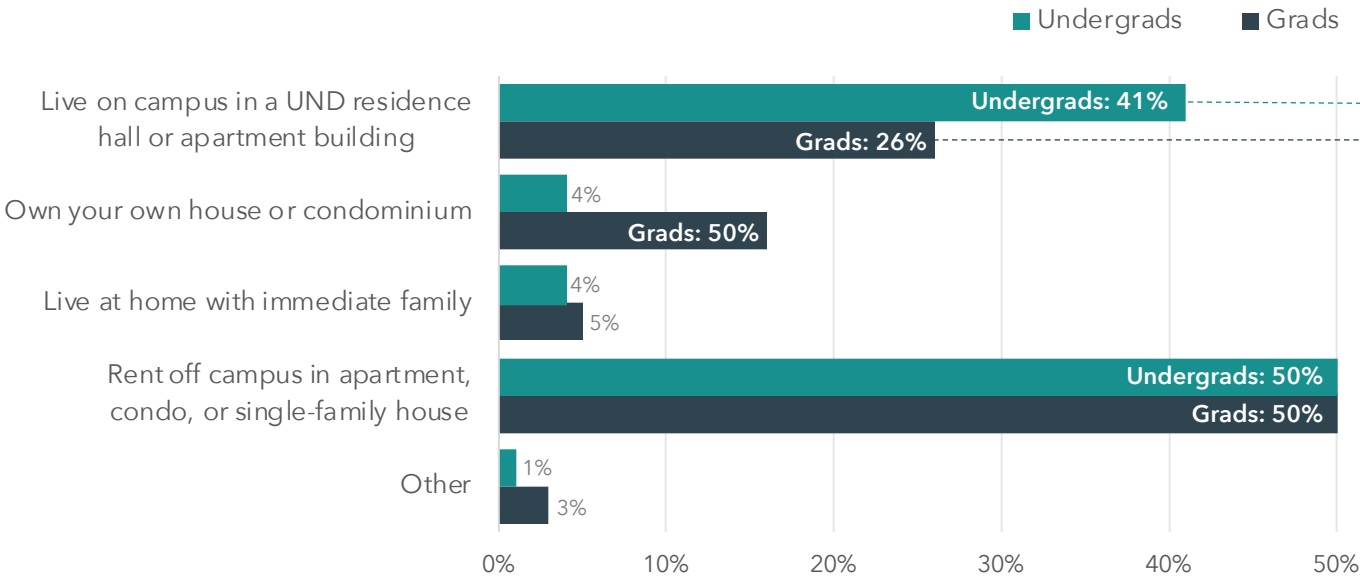
Of that 54% cohort, 20% would be interested in moving closer to campus for a housing option that offered their desired amenities.

We estimate this 20% equates to about 660 graduates

COMPARISON: UNDERGRAD VS GRAD STUDENTS

UNDERGRADUATE VS. GRADUATE STUDENTS

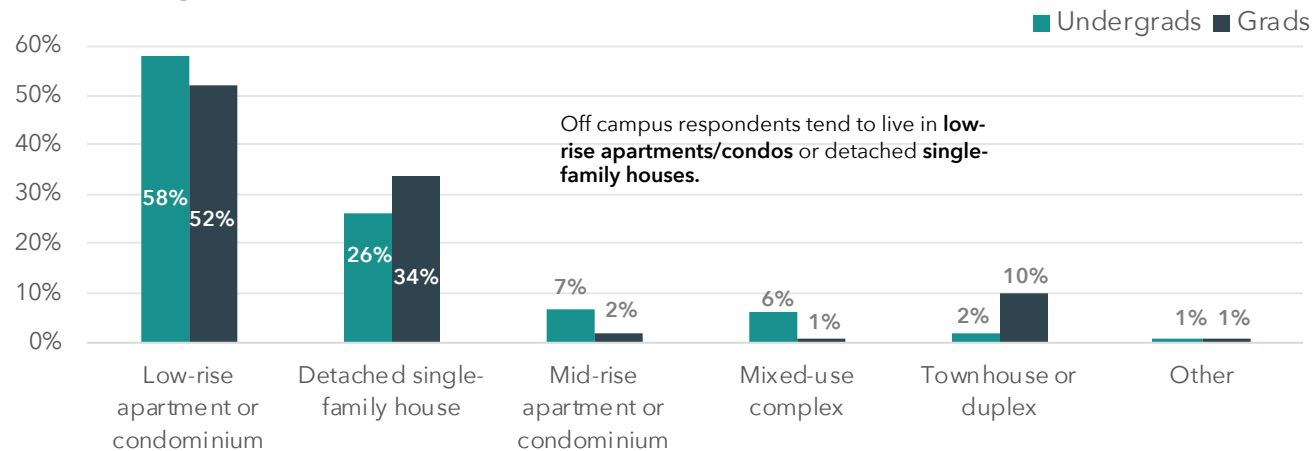
Current Housing Status




Freshmen make up more than half of the UND housing cohort. Upperclassmen respondents tend to live off campus as they advance to each academic year.

1st-year grads were most likely to live in UND housing. On campus residence tends to decrease as students progress through their programs.


Off-Campus Housing Arrangements






Live Alone

7% 22%




Have roommates

72% 24%



Live with Spouse/partner

11% 48%



*Share a bedroom

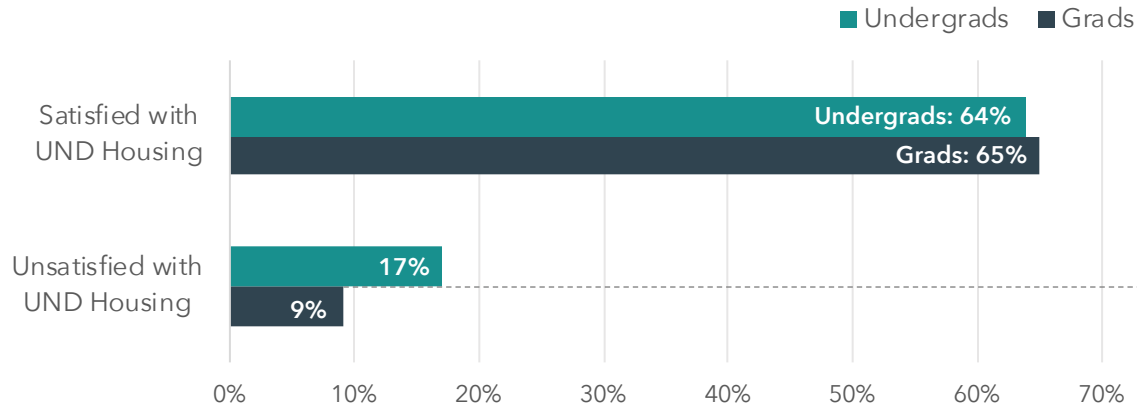
24% 3%

Grad respondents were more likely to live with spouses/partners or live alone, while undergrad respondents were more likely to live with roommates.

*This excludes grads living with spouses/partners

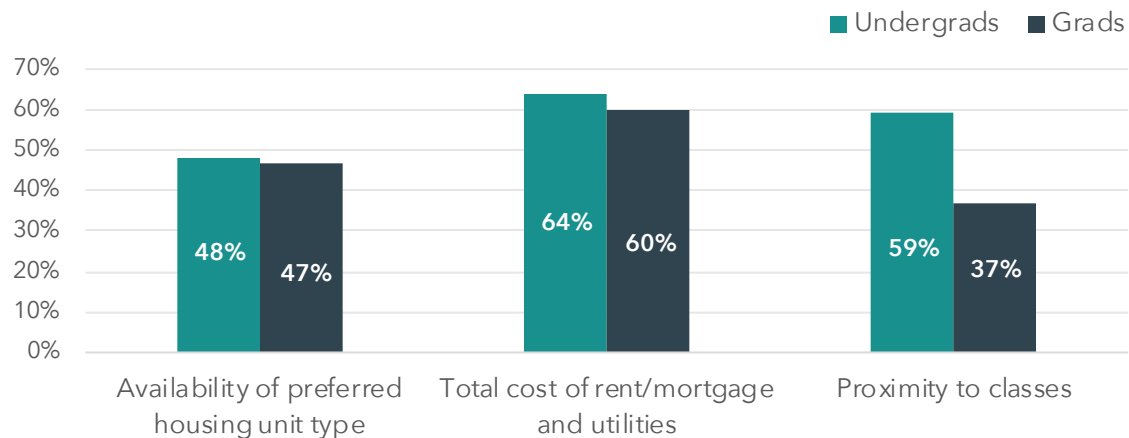
UNDERGRADUATE VS. GRADUATE STUDENTS

Current UND Housing Satisfaction



17 percent of on-campus undergrads and **9 percent of on-campus grads** indicated they were **not satisfied** with UND housing.

Top 3 Factors that Influenced Current Housing Choice



Undergrads and **grads** shared the same top factors that influenced their current housing decision:



Availability of preferred housing type



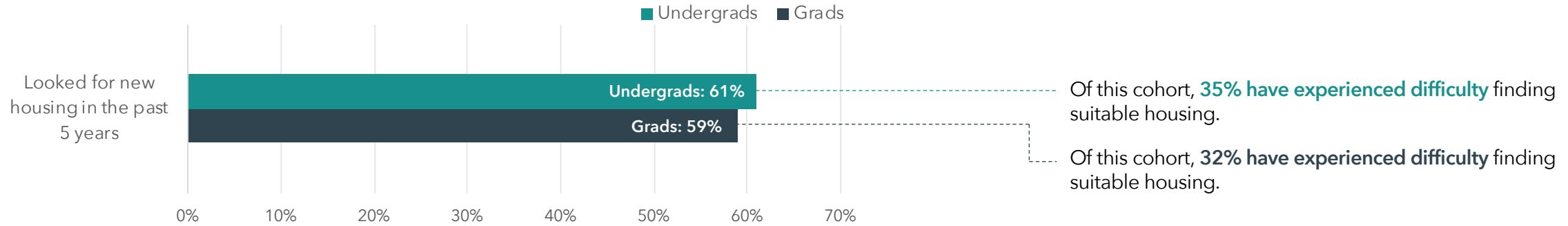
Total cost of rent/mortgage and utilities



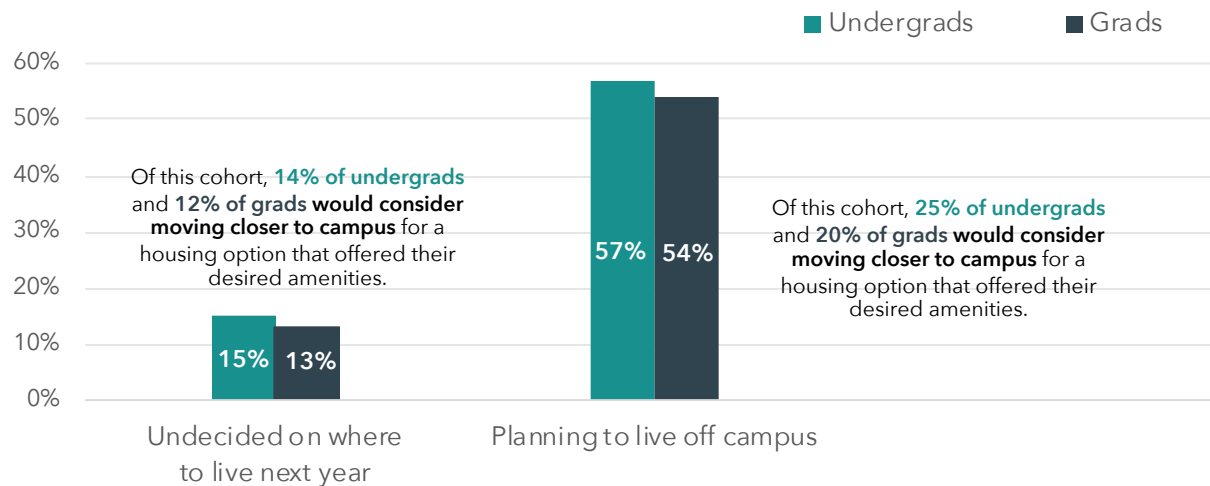
Proximity to classes

UNDERGRADUATE VS. GRADUATE STUDENTS

Future Housing Search








Willingness to move closer to UND campus








Top 5 Most Desired Housing Features

Undergrads

-  : In-unit kitchen
-  : In-unit washer/dryer
-  : Living room
-  : Lease flexibility
-  : Secure access to building

Grads

-  : In-unit kitchen
-  : In-unit washer/dryer
-  : On-site parking
-  : Individual bathroom
-  : Wireless internet

FUTURE STUDENT HOUSING DEMAND ANALYSIS

FUTURE STUDENT HOUSING DEMAND

Demand				
(Number of students interested in on-campus housing)				
	2019	2020	2021	2022
Estimated Undergraduate Demand	3,610	3,624	3,576	3,514
Freshman	2,428	2,378	2,330	2,283
Sophomore	715	779	763	748
Junior	212	227	244	239
Senior	256	239	238	244
Estimated Graduate Demand	238	245	248	250
Estimated Total Demand	3,848	3,869	3,824	3,764

The table above outlines the total number of students estimated to seek on-campus housing between 2019-2022. Estimated demand is derived from extrapolating **student survey results to 2018 student enrollment** data broken down by academic year. The values shown above reflect a **conservative approach** to estimating student demand, where:

- Anticipated percentage of freshmen living on-campus = 95%
- Condition(s) for upperclassmen and grad students to live on-campus:
 - Maximum monthly rent price point = \$699/month (based on a 9-month academic year)
 - Must be apartment-style housing

Student Housing Demand Model

In an effort to fully grasp student housing demand, UND has quantified the **number of students that would be interested in on-campus housing** for the 2019-2020 academic year and beyond. By incorporating **enrollment, facilities, and student housing survey** data, UND has determined there will be a **need for new, mixed-use on-campus housing facilities** that cater to students' desired housing preferences.

The table (left) estimates **total student demand**, regardless of current housing supply.

The demand model incorporates:

- Historic enrollment trends
- Anticipated percentage of freshmen living on-campus
- Percentage of upperclassmen and graduate students who are undecided on where to live next academic year in 2019-2020
- Percentage of upperclassmen and graduate students who would consider living on-campus for a desirable housing option
- Percentage of upperclassmen and graduate students willing to pay more for a desirable housing option on-campus
- Percentage of upperclassmen and graduate students who desire apartment-style housing

FUTURE STUDENT HOUSING SUPPLY

Fall 2019 UND Housing Inventory

Residence Halls			
Building	Usage	Total Beds (Assignable)	Fall 2018 Primary Occupants
Bek Hall*	Coed by Floor	-	Mixed undergrads - mostly freshmen (149 beds)
Brannon Hall	Coed by Suite	286	Mixed undergrads - mostly freshmen
Fulton Hall*	Coed by Floor	-	Mixed undergrads - mostly freshmen (171 beds)
Hancock Hall	Coed by Room	72	Graduate or 21+ students
Johnstone Hall	Coed By Floor	120	Mixed undergrads
McVey Hall	Coed by Suite	297	Was vacant in Fall 2018
Noren Hall	Coed by Suite	313	Mixed undergrads - mostly freshmen
Selke Hall	Coed by Suite	310	Mixed undergrads - mostly freshmen
Smith Hall	Coed by Floor	242	Mixed undergrads
Squires Hall	Coed by Suite	242	Returning or transfer students (non-freshmen)
Swanson Hall**	Coed by Room	-	Mostly upperclassmen (197 beds)
Walsh Hall*	Coed by Suite	-	Mixed undergrads - mostly freshmen (372 beds)
West Hall	Coed by Suite	293	Was vacant in Fall 2018
University Place	Coed by Apt.	275	Mostly upperclassmen
Total		2,450	

Apartments				
Unit Type	Maximum Occupants	Total Units (Assignable)	Implied Beds	Fall 2018 Primary Occupants
Two-Bedroom	4	407	1,628	
Four-Bedroom	8	1	8	
Three-Bedroom	6	68	408	
Studio	1	7	7	
One-Bedroom	2	177	354	
Total		660	2,405	Returning students, transfer students, faculty and staff. In Fall 2018, there were 954 total apartment residents, of which about 90% were students (undergrad + grad).

**Total UND beds available in 2019
(including non-students)** **4,855**

Student Housing Supply (Inventory)

In addition to demand, UND has outlined its available **2019 housing inventory, including residence halls and apartments**. The inventory includes both student and non-student beds, as UND leases approximately 10% of its beds to non-students (faculty, staff, aerospace leaseholders, etc.). Historic occupancy data has also been analyzed to determine how many non-student beds to exclude from the true demand estimates.

The table (left) displays **total housing supply for Fall 2019**.

The supply inventory for 2019 and beyond assumes that:

- Bek, Fulton, and Walsh Halls will re-open for the 2020-2021 academic year
- Swanson Hall will re-open for the 2021-2022 academic year
- Each apartment bedroom is occupied by up to two students (e.g. a 3-bedroom apartment has 6 occupants)
- Non-student beds will be factored out of the true demand estimates

*Assuming Bek, Fulton, and Walsh Halls will reopen in 2020-2021

**Assuming Swanson Hall will reopen in 2021-2022

FUTURE STUDENT HOUSING SUPPLY & DEMAND

Supply & Demand Model

	2019	2020	2021	2022
1) Existing Demand (Upperclassmen & Grad Students)	1,421	1,490	1,494	1,481
Upperclassmen	1,183	1,245	1,246	1,231
Grad & Professional	238	245	248	250
2) Existing Supply (Upperclassmen & Grad Beds)	2,673	2,819	2,999	2,999
Residence Halls	909	1,055	1,236	1,236
Upperclassmen	896	1,041	1,218	1,218
Grads	14	14	18	18
Apartments	1,764	1,764	1,764	1,764
Upperclassmen	968	968	968	968
Grads	795	795	795	795
3) Available beds that satisfy existing demand	559	559	559	559
Residence Halls	268	268	268	268
Upperclassmen	265	265	265	265
Grads	3	3	3	3
Apartments	291	291	291	291
Upperclassmen	169	169	169	169
Grads	122	122	122	122
4) Beds that do NOT satisfy existing demand	2,114	2,260	2,440	2,440
Residence Halls	641	787	967	967
Upperclassmen	630	776	952	952
Grads	11	11	15	15
Apartments	1,473	1,473	1,473	1,473
Upperclassmen	800	800	800	800
Grads	673	673	673	673
5) Estimated beds needed to satisfy Existing Demand (True demand = Existing Demand - Available beds that satisfy existing demand)	862	931	935	922
Upperclassmen	749	811	812	797
Grads	113	120	123	125

Student Housing True Demand Estimates

While the analysis incorporates freshmen demand, in reality, the vast **majority of freshmen will be required to live in UND's residence halls** as part of the First-Year Campus Housing Requirement. Therefore, the true demand estimates for **upperclassmen and graduate students** are the **most significant to consider**, as these cohorts are most interested in apartment-style housing at their desired price point in order to consider living on-campus again.

The table (left) displays **the true demand estimates for 2019 and beyond, and reads as:**

- 1) The existing upperclassmen and graduate student demand for on-campus housing, independent of existing UND housing supply
- 2) The existing UND housing bed inventory dedicated to upperclassmen and graduate students only (based on historical occupancy trends)
- 3) Of the existing housing inventory in section 2, these are the available beds that can accommodate the existing demand in section 1 (given that upperclassmen and graduate students desire apartment-style housing at an affordable price point if they are going to live on campus)
- 4) Similarly, these are the number of beds that cannot accommodate the existing demand in section 1
- 5) These are the number of beds still required in order to fully accommodate existing demand in section 1

The true demand model for 2019 to 2022 also assumes that:

- New housing that may be constructed in the future (residence halls and/or apartments) are not incorporated into demand



ADVISORS