1. What we are doing
2. What we learned
3. Programmatic Concepts
4. Next Steps
What we are doing
Objective: To understand the nature and quantity of housing demanded at Humboldt State

- Begun in October by discussing with students and campus leadership
- Off-campus analyses, demographic analyses
- Student survey in December
- Market demand analyses
- Financial feasibility
- Physical program concepts
What we learned
Demographic Analysis – Increased Diversity & Draw from out of area

Existing Conditions – Spaces that build community

Off-Campus Housing Supply Analysis – Student Adverse Market

Peer Benchmark Analysis – Competitive with peers

Survey Analysis – Affordability major student concern

Demand Analysis – Significant market demand for new beds
**OVERVIEW**

**DEMOGRAPHIC ANALYSIS**

Graduate Enrollment: 535

Undergraduate Enrollment: 7,968

**8,503**

Total Enrollment for Fall 2016

78% of students are between the ages of 18-24

74%

Average retention of first-time students

93%

Of Undergraduates are enrolled full-time
FIRST GENERATION
DEMOGRAPHIC ANALYSIS

43% Increase in first-generation students in the past 10 years

33%+ Average composition of 1st generation students in CSU system
DEMOGRAPHIC ANALYSIS

Decrease in Humboldt County population among undergraduates in the last 10 years

Increase in LA/San Diego County populations among undergraduates in the last 10 years
HSU has consistently experienced a very high occupancy rate in on-campus housing. Capacity has increased to meet demand, yet waitlists are still unabated.
RENTAL RATES
OFF-CAMPUS MARKET ANALYSIS

Multi-Family

<table>
<thead>
<tr>
<th>Unit</th>
<th>Private</th>
<th>Double</th>
</tr>
</thead>
<tbody>
<tr>
<td>Studio</td>
<td>$755</td>
<td>$378</td>
</tr>
<tr>
<td>1-Bed</td>
<td>$755</td>
<td>$378</td>
</tr>
<tr>
<td>2-Bed</td>
<td>$950</td>
<td>$488</td>
</tr>
<tr>
<td>3-Bed</td>
<td>$1,109</td>
<td>$370</td>
</tr>
</tbody>
</table>

Single Family

<table>
<thead>
<tr>
<th>Unit</th>
<th>Private</th>
<th>Double</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-Bed</td>
<td>$1,063</td>
<td>$531</td>
</tr>
<tr>
<td>3-Bed</td>
<td>$1,748</td>
<td>$583</td>
</tr>
<tr>
<td>4-Bed</td>
<td>$1,468</td>
<td>$367</td>
</tr>
</tbody>
</table>

Rental rate per person per month (not including utilities)

Average Apt Rental Rate per Person per Month: $584

Average security deposit among apartments surveyed: $1,031

Estimated rental rate decrease since 2012 in Arcata, CA: 11%

Rental rates in Eureka decreased by 10%
**Markets Type**

**Off-Campus Market Analysis**

**Student Averse**
- Discourages students
- Requires credit check
- 12-month leases
- Few student amenities
- General market focused

**Student Friendly**
- Welcomes students
- Many student residents
- Some student amenities:
  - Fitness center
  - Swimming pool
  - Some flexible lease
  - Parental lease guarantee
  - Some furnished units

**Student Focused**
- Built for students
- Only students residing
- Student amenities
- Individual lease
- Roommate matching
- Academic term
- Full-furnished
- Community space
- Walk to campus
Programmatic Concepts
## Market Response Using 3rd Party Swing Space

### Concept 1

<table>
<thead>
<tr>
<th>Unit Type</th>
<th>Demand</th>
<th>Existing</th>
<th>New</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional</td>
<td>659</td>
<td>456</td>
<td>200</td>
<td>3</td>
</tr>
<tr>
<td>Suite</td>
<td>1212</td>
<td>583</td>
<td>625</td>
<td>4</td>
</tr>
<tr>
<td>Apartment</td>
<td>1017</td>
<td>800</td>
<td>0</td>
<td>217</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>2888</strong></td>
<td><strong>1839</strong></td>
<td><strong>825</strong></td>
<td><strong>224</strong></td>
</tr>
</tbody>
</table>

- 425 Suite-style Beds
- Canyon Complex 445 Beds
- 200 Traditional + 200 Suite-style beds
CONCEPT 2

MARKET RESPONSE WITHOUT 3RD PARTY SWING SPACE

<table>
<thead>
<tr>
<th>Unit Type</th>
<th>Demand</th>
<th>Existing</th>
<th>New</th>
<th>Gap</th>
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<td>200</td>
<td>3</td>
</tr>
<tr>
<td>Suite</td>
<td>1212</td>
<td>583</td>
<td>600</td>
<td>29</td>
</tr>
<tr>
<td>Apartment</td>
<td>1017</td>
<td>800</td>
<td>0</td>
<td>217</td>
</tr>
<tr>
<td>Subtotal</td>
<td>2888</td>
<td>1839</td>
<td>800</td>
<td>249</td>
</tr>
</tbody>
</table>

200 Traditional + 200 Suite-style beds

Canyon Complex 445 Beds

Sunset Hall 456 Beds

Redwood Hall

JGC

400 Suite-Style Beds
Next Steps
Integrate feedback
Compose Briefing Document
Additional financial research
Detailed project definition
  - High-level Physical Program
  - Financial Conceptualization
  - Site Massing & Location
HUMBOLDT STATE UNIVERSITY

STUDENT HOUSING DEMAND ANALYSIS
MARCH 2, 2017