

**OVERVIEW OF THE OFF-CAMPUS STUDENT HOUSING
MARKET IN CACHE COUNTY**

Prepared for John Brandley

Prepared by James Wood

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Overview of the Off-Campus Student Housing Market in Cache County

Business Model – Independence, with 108 units and 648 beds, is one of only two off-campus student housing developments to offer high quality, luxury off-campus rental housing. Independence will have an enhanced amenity package, superior interior design (granite countertops to 9 foot ceilings) and greater space. The only other luxury development is Blue Square, which opened its first building in the Fall of 2012. Blue Square’s first building of 41 units (93 beds) was 100 percent occupied. Blue Square will add another 52 units in 2013 with a total of 223 beds.

Location – Independence will be located at 600 East 1000 North only one block west of the USU campus, an excellent location.

Rental Inventory – The most accurate count of renter occupied units is the decennial census. In 2000 the number of renter occupied units in Cache County was 9,747. From 2000 to 2010 the number of renter occupied units increased by 23.5 percent or 2,295 units, an annual average compound growth rate of 2.13 percent and an average increase of about 230 units annually. For Logan City the number of renter occupied units grew at a slower pace, increasing at an average annual rate of 1.56 percent or 130 units annually. North Logan experienced the most rapid growth with an average growth rate of 7 percent in renter occupied units. Much of the growth in North Logan is due to tax credit and market rate apartment projects targeted for families.

Another rapidly growing inventory was the number of on-campus housing units. The Census shows the number of students living in university student housing increased from 1,631 in 2000 to 3,065, in 2010 an average annual increase of 6.5 percent. In 2012 the occupancy rate was 97 percent for on-campus student housing.

**Table 1
Change in Rental Inventory 2000-2010**

	2000	2010	Numerical	Percent	AAGR*
Cache County	9,747	12,042	2,295	23.5%	2.13%
Logan	7,790	9,098	1,308	16.8%	1.56%
North Logan	402	790	388	96.5%	7.00%
Group Quarters Renters					
College Dorm	1,631	3,065	1,434	87.9%	6.51%

*average annual growth rate.
Source: U.S. Census Bureau.

The inventory of student housing controlled by Utah State University shows a housing capacity of 3,100 students in 1,091 units. There are five housing projects or types with an average number of students/unit of 2.8 as shown in Table 2.

**Table 2
Utah State University Student Housing - 2012**

	Units	Students Capacity	Students/Unit
Family Housing Units	522	522	1.0
Traditional Student Housing	274	1,426	5.2
Towers	186	372	2.0
Richards	45	270	6.0
Living Learning Center	64	512	8.0
Total	1,091	3,102	2.8

Source: Utah State University.

Apartment Construction – Over the past thirteen years the number of new apartment units built in Cache County totals 1,587. The increase in Logan was 879 and in North Logan 547 units Table 3.

Table 3
New Apartment Construction in Cache County

	Cache	Logan	North Logan
2000	115	0	115
2001	240	240	0
2002	12	4	0
2003	85	76	0
2004	331	115	112
2005	80	72	0
2006	126	6	120
2007	34	11	20
2008	45	40	0
2009	3	3	0
2010	227	215	0
2011	81	33	48
2012	208	64	132
Total	1,587	879	547

Source: Bureau of Economic and Business Research, University of Utah.

Notice that the increase in new apartment units is lower, considerably lower, than the increase in renter occupied units as shown in Table 1. For example the number of renter occupied units in Cache County increased by 2,295 units between 2000 and 2010 but the number of new apartment units built was only 1,298 units Table 4. Consequently new apartment units accommodated only 57 percent of the increase in renter occupied units. The remaining 43 percent or 997 renters are renting units that were likely developed for owner occupied use but are now being rented; single family homes, condominiums, town homes and twin home. This is an indicator of supply constraints due likely to zoning ordinances and Nimbysism that tend to hold down high density rental development. These constraints benefit existing rental project by limiting competition. Independence will be a beneficiary of the supply constraints.

Table 4
New Apartment Unit's Share of Increase in Renter Occupied Units – 2000 to 2010

	New Rental Units	Increase in Renter Occupied Units	New Apts. As Share of Rental Unit Increase.
Cache	1,298	2,295	56.6%
Logan	782	1,308	59.8%
North Logan	367	388	94.6%

Source: U.S. Census Bureau and Bureau of Economic and Business Research, University of Utah.

Market Share – In 2012 Utah State University's fall headcount was 17,009 students. Twenty-five percent or 4,250 of these students are from Cache County. Assuming these Cache County residents live at home the remaining 12,750 students comprise the market for student housing. Student housing has two segments; on campus housing about 3,100 students and off campus housing about

9,650 students. The development of the two luxury off campus developments—Independence and Blue Square will have a total of 871 beds representing seven percent of the total student housing market and 9.0 percent of the off-campus student housing market. While the depth of luxury student markets has not yet been fully tested a market share of 10 percent of off-campus student housing does not seem an excessive level of luxury unit development; 10 percent seems a reasonable level of development for the unique product offered by Independence.

The inventory of renter occupied units in Cache County is 12,330 in 2012 Table 5. This inventory does not include the number of housing units on campus, which are classified as group quarters but does include the off campus student housing. Logan City has nearly 9,200 renter occupied units in 2012. Assuming that almost all off campus student housing is located in Logan the 9,400 students living off campus require approximately 3,000 rental units at three students per unit. Consequently the off campus student housing market requires one-third of all rental units in Logan City. In terms of units for off-campus student housing, the addition of Independence’s 108 units will represent less than 4 percent of the off-campus student housing units.

Table 5
Inventory of Rental Occupied Housing in Cache County,
Logan and North Logan

	2010	New Construction 2010-2012	2012
Cache County	12,042	289	12,330
Logan	9,098	97	9,195
North Logan	790	180	970

Source: U.S. Census Bureau and Bureau of Economic and Business Research.

Demand and Enrollment Growth – Enrollment, the source of demand for student housing, is expected to increase at a 2.1 percent annually from 2008 to 2017. However, in the 2013-2014 academic year enrollment is projected to fall by 4 percent due to the changes in the missionary policy by the LDS church. The new policy now allows males to go on a mission at 18 years of age rather than 19 years. However, the short-term negative effects are offset two years later as missionaries return and enroll in school. From the 2012-2013 academic year to the 2017-2018 academic year enrollment is expected to increase annually by 250 students. It is clear that this growth in enrollment will only account for a small fraction of Independence’s 648 students. The large majority of renters at Independence will come from the existing pool of 12,750 students that need housing. Growth adds about 250 new students to this pool of demand each year.

Table 6
Fall Head County Enrollment for Utah State University
Logan Campus

Year	Fall Head Count
2008	15,091
2009	15,604
2010	16,447
2011	16,850
2012	17,009
2013	16,329
2014	16,656
2015	17,539
2016	17,890
2017	18,248
AAGR*	2.1
Avg. Growth 2012-2017	250

**average annual
growth rate
Source: Utah State
University.*

Summary

- Cache County has an inventory of 12,330 renter occupied units in 2012. Logan City’s inventory is 9,200 units. There are no signs of overbuilding. The increases in new apartment units over the past three years represent less than 1.5 percent of the rental inventory annually. The occupancy rate for student housing as reported in Fall of 2012 was 97 percent for on-campus student housing.

Utah State University Housing controls 1,091 student housing units with a capacity of 3,100 students.

The number of students living off-campus is estimated at 9,400 and requires about 3,000 off campus housing units. These student units account for about one-third of the rental units in Logan City.

- Demand for student housing will drop in Fall 2013 three to four percent due to the change in missionary policy but will be offset two years later with the return of missionaries.
- The proposed 108 units and 648 beds at Independence represent a little less than 4 percent of the off-campus student housing units and 7 percent of the off-campus student beds. When combined with Blue Square, the only other luxury project in the market, they account for about 9 percent of the off-campus student housing market; a reasonable market share for a luxury product.
- Independence carries only moderate risk given current market conditions, enrollment projections, the project’s excellent location and unique product.

VITA

JAMES A. WOOD

P.O. Box 58107
Salt Lake City, Utah 84158

Phone: (801) 581-7165 (office), fax (801) 581-3354
(801) 583-0392 (residence)

EDUCATION

University of Utah, Salt Lake City, Utah; B.S. Finance, June 1967.
University of Utah, Salt Lake City, Utah; Graduate Student in Economics, 1970-1974.

MILITARY EXPERIENCE

United States Army, Military Intelligence 1968-1970; Vietnam 1969-1970.

EMPLOYMENT EXPERIENCE

2002 to present, Director, Bureau of Economic and Business Research, David Eccles School of Business, University of Utah.
1975 to 2002, Senior Research Analyst, Bureau of Economic and Business Research, David Eccles School of Business, University of Utah, Salt Lake City, Utah.
1975 to present, private consultant, James A Wood & Associates, Salt Lake City, Utah.
1974-1975 - Legislative Aide on economic issues for Senator Frank E. Moss, Washington, D.C.
1972-1974 - Research Analyst, Bureau of Economic and Business Research.
1970 (summer) - Accountant, Jacobsen Construction Company, Salt Lake City, Utah.
1966-1967 - Accountant, Utah Idaho Sugar Company, Salt Lake City, Utah.

ADVISORY COMMITTEES AND BOARDS

Ex-Officio Member of the Board of Trustees Downtown Alliance Salt Lake City.
Committee Member of Revenue Assumption Committee, State of Utah.
Board Member of NeighborWorks Salt Lake City
President of Wasatch Economic Forum 2008-2009
Advisory Board Member of the Salt Lake County Housing Trust Fund 2009-2013
Board Member Salt Lake Home Builders Association
Member Salt Lake County Consortium Housing (HOME) Committee

UNIVERSITY RESEARCH STUDIES AND PUBLICATIONS

Housing and Urban Development Sustainable Communities Grant 2011-2014. Grant awarded to Salt Lake County and a research team composed of six participants including the Bureau of Economic and Business Research, University of Utah. The Regional Analysis of Impediments and Fair Housing Equity Assessment for 65 municipalities and four counties will be completed by a four-person team at the Bureau of Economic and Business Research under the direction of James Wood. Purpose of the grant is to improve the regional integration of housing, transportation and economic development to enhance access to opportunities.

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