



National Student Housing Report

January 2025 Analysis and Market Trends



Regional Average Pre-Lease

WEST

'25'-26': Pre-Lease: 33.3%
PY Pre-Lease: 37.3%

MIDWEST

'25'-26': Pre-Lease: 54.2%
PY Pre-Lease: 55.2%

NORTHEAST

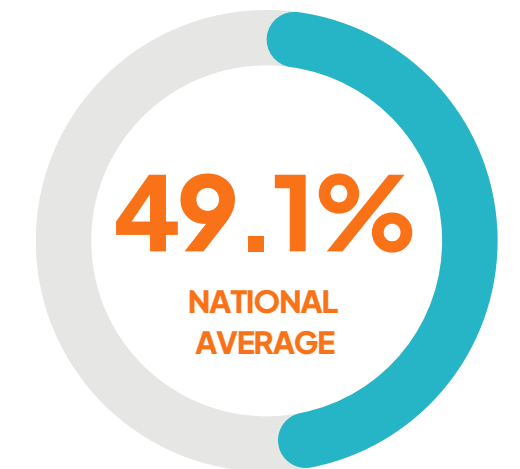
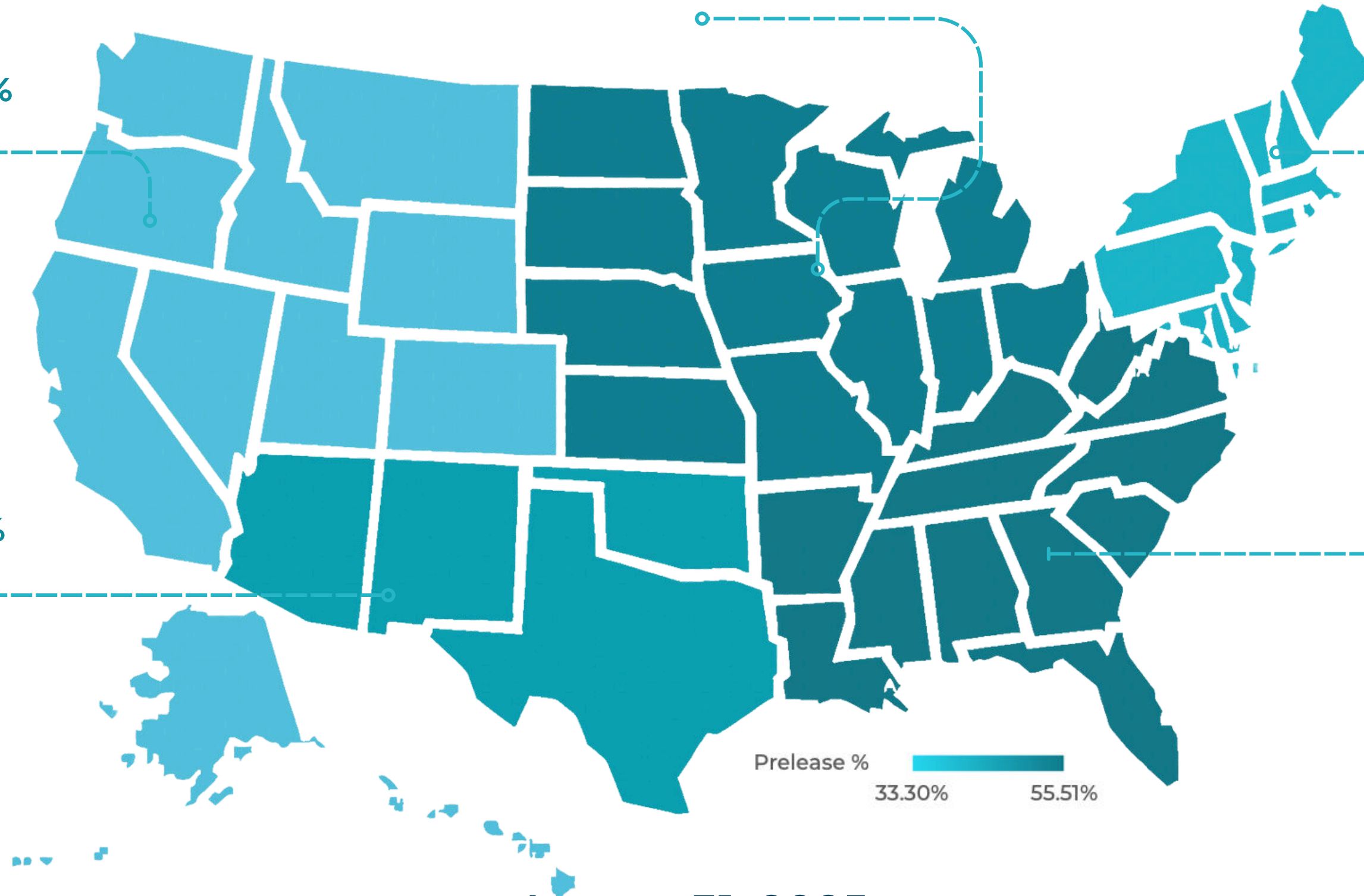
'25'-26': Pre-Lease: 41.6%
PY Pre-Lease: 44.8%

SOUTHWEST

'25'-26': Pre-Lease: 46.1%
PY Pre-Lease: 51.2%

SOUTHEAST

'25'-26': Pre-Lease: 55.5%
PY Pre-Lease: 57.5%



49.1%
NATIONAL
AVERAGE

-2.9% YoY

January 31, 2025

Regional Average Rate Per Bed

WEST

'25'-26': Avg Rate: **\$1,104**
PY Avg Rate: \$1,074

MIDWEST

'25'-26': Avg Rate: **\$970**
PY Avg Rate: \$890

NORTHEAST

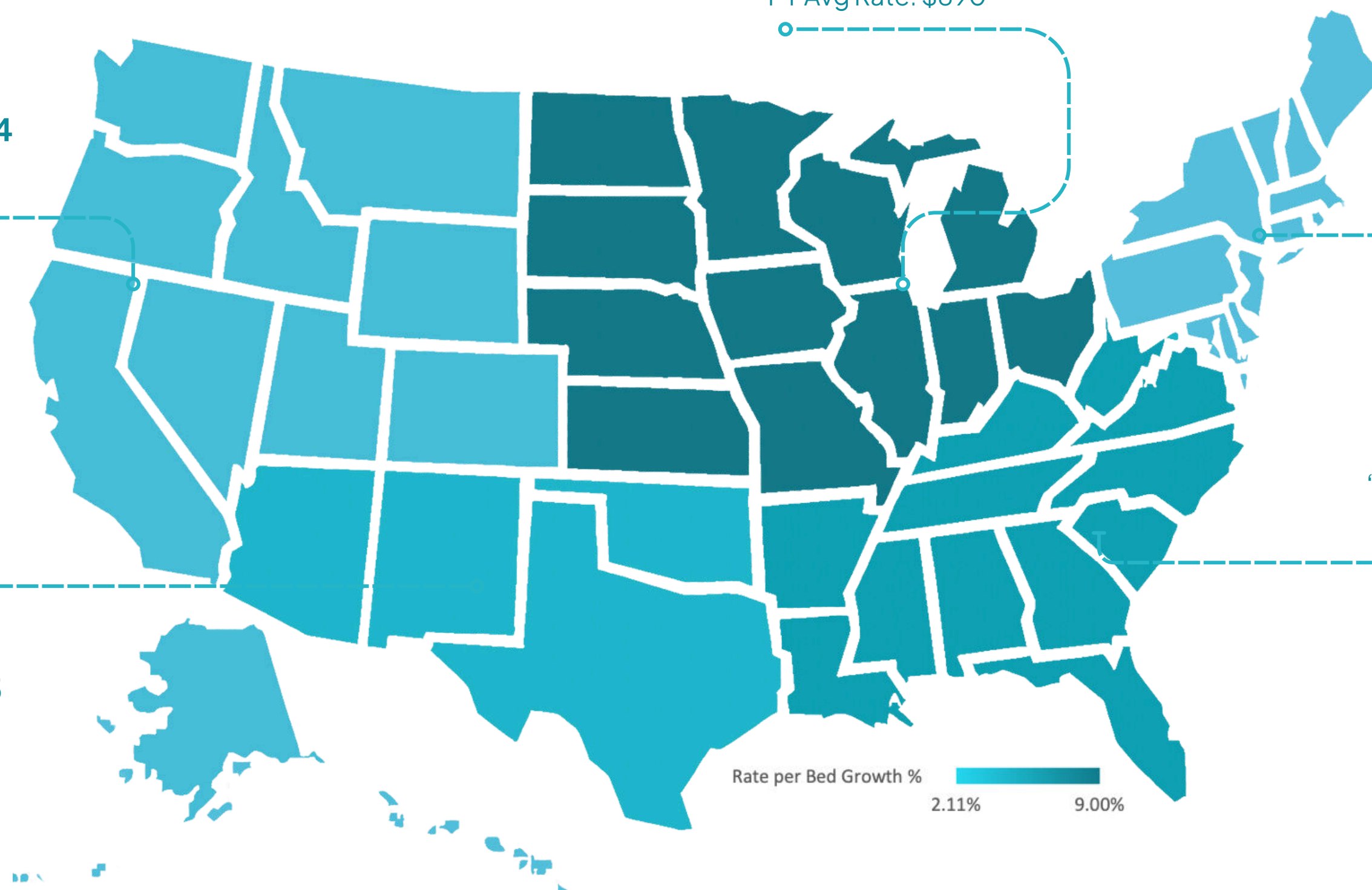
'25'-26': Avg Rate: **\$1,184**
PY Avg Rate: \$1,160

SOUTHEAST

'25'-26': Avg Rate: **\$959**
PY Pre-Lease: \$905

SOUTHWEST

'25'-26': Pre-Lease: **\$945**
PY Pre-Lease: \$906



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Floor Plan Pre-Lease

24' - 25' vs. 25' - 26'

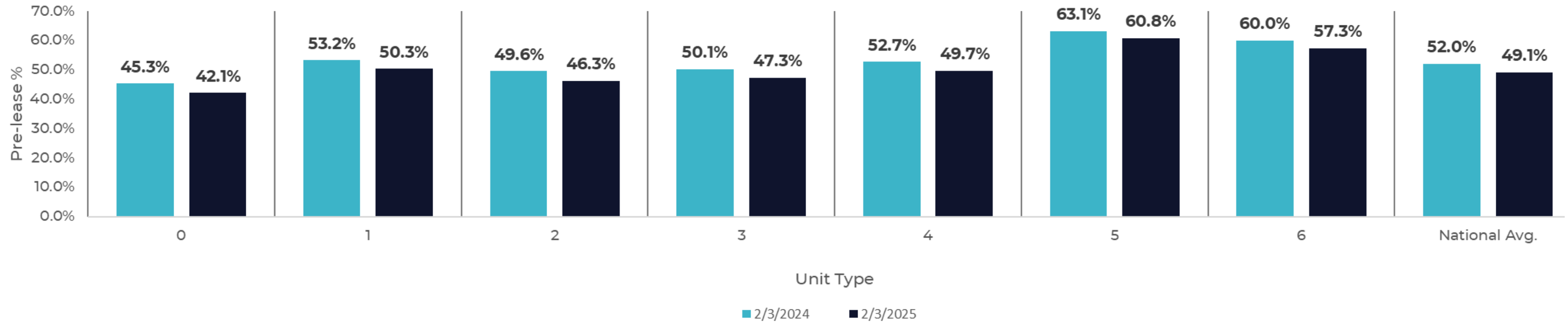
Type	24'-25' Pre-Lease %	25'-26' Pre-Lease %	Growth %
STUDIO	45.3%	42.1%	-3.2%
1	53.2%	50.3%	-2.9%
2	49.6%	46.3%	-3.3%
3	50.1%	47.3%	-2.8%
4	52.7%	49.7%	-3.0%
5	63.1%	60.8%	-2.3%
6	60.0%	57.3%	-2.7%

Floor Plan Avg Rate per Bed

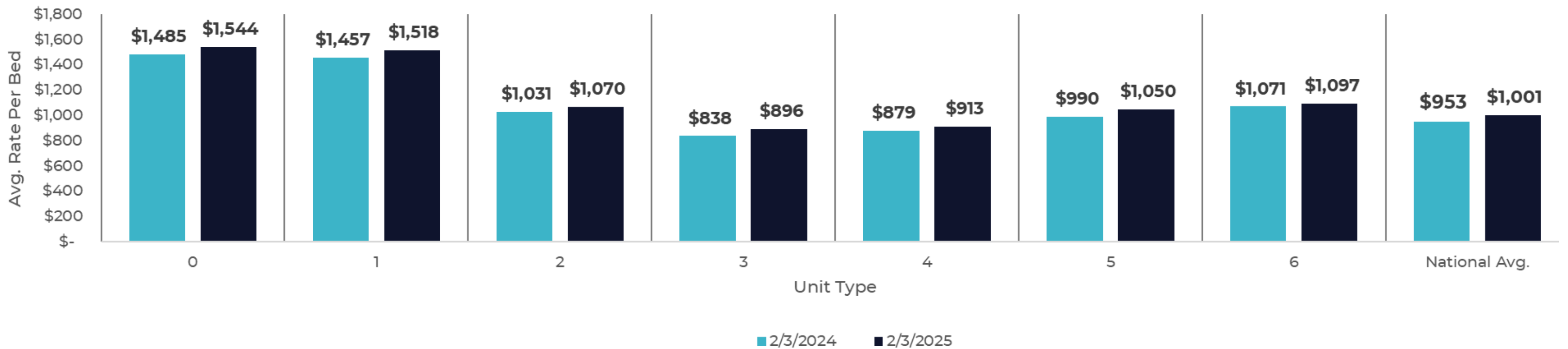
24' - 25' vs. 25' - 26'

Type	PY Avg Rate Per Bed	CY Avg Rate Per Bed	Growth %
STUDIO	\$1,485	\$1,544	+4.0%
1	\$1,457	\$1,518	+4.2%
2	\$1,031	\$1,070	+3.8%
3	\$838	\$896	+6.9%
4	\$879	\$913	+3.8%
5	\$990	\$1,050	+6.1%
6	\$1,071	\$1,097	+2.4%

Floor Plan Pre-Lease Trends 24'–25' vs. 25'–26'



Floor Plan Rate Trends 24'–25' vs. 25'–26'



Contact College House Today to Learn More



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