

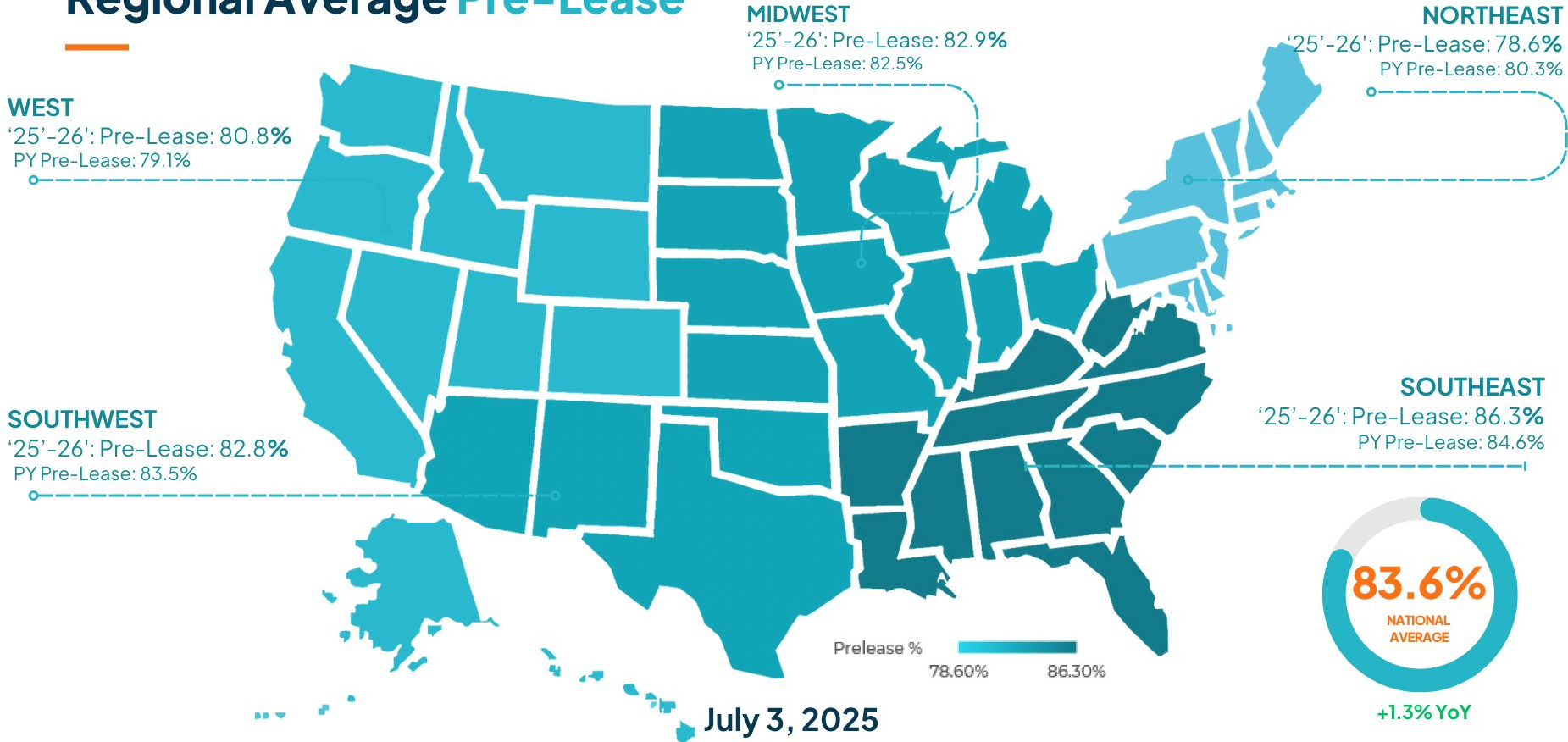


National Student Housing Report

June 2025



Regional Average Pre-Lease



July 3, 2025

Regional Average Rate Per Bed

WEST

'25-'26': Avg Rate: **\$1,117**
PY Avg Rate: \$1,085

SOUTHWEST

'25-'26': Pre-Lease: **\$943**
PY Pre-Lease: \$927

MIDWEST

'25-'26': Avg Rate: **\$976**
PY Avg Rate: \$927

NORTHEAST

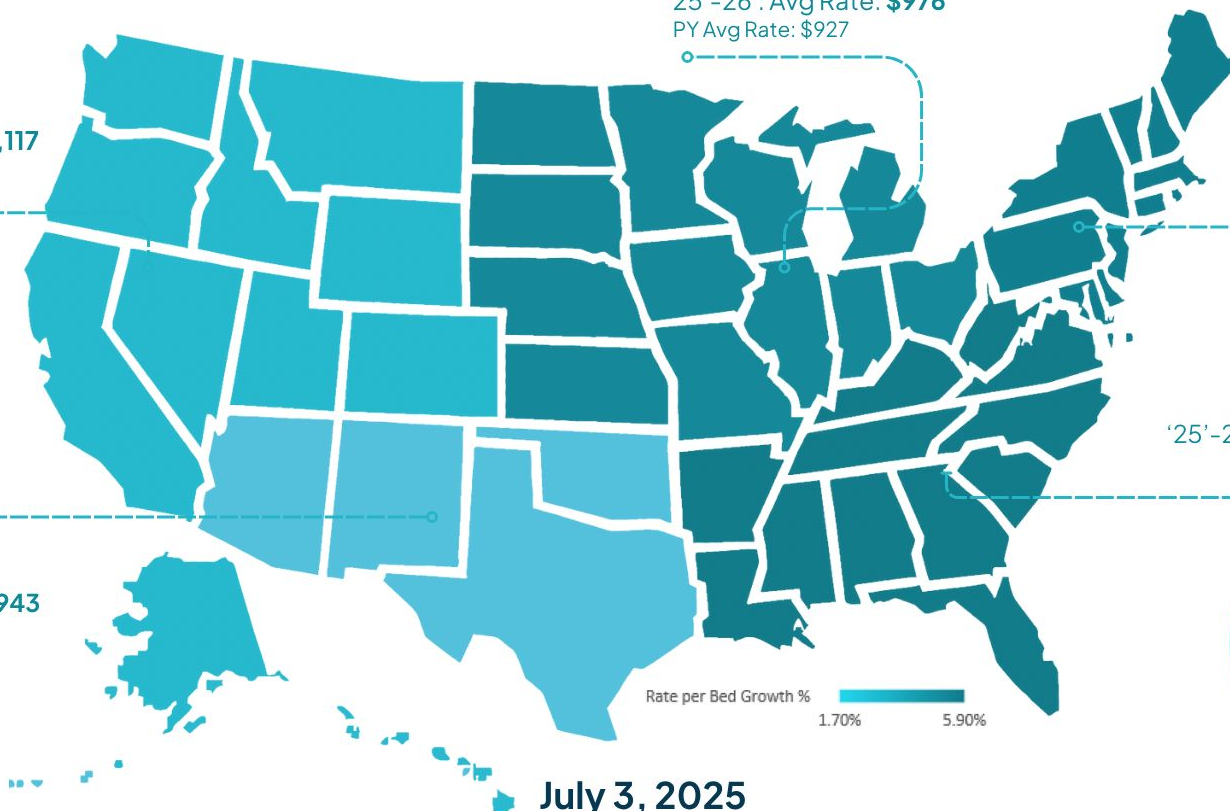
'25-'26': Avg Rate: **\$1,250**
PY Avg Rate: \$1,184

SOUTHEAST

'25-'26': Avg Rate: **\$964**
PY Pre-Lease: \$910



+4.6% YoY



July 3, 2025

Floor Plan Pre-Lease

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

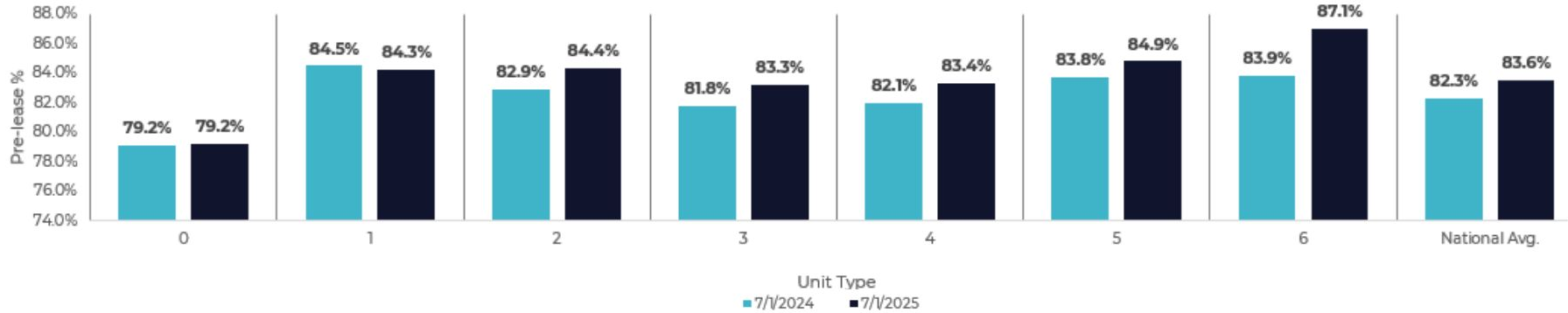
| Type | 24'-25' Pre-Lease % | 25'-26' Pre-Lease % | Growth % |
|---------------|------------------------|------------------------|--------------|
| STUDIO | 79.2% | 79.2% | +0.0% |
| 1 | 84.5% | 84.3% | -0.2% |
| 2 | 82.9% | 84.4% | +1.5% |
| 3 | 81.8% | 83.3% | +1.5% |
| 4 | 82.1% | 83.4% | +1.3% |
| 5 | 83.8% | 84.9% | +1.1% |
| 6 | 83.9% | 87.1% | +3.2% |

Floor Plan Avg Rate per Bed

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

| Type | PY Avg Rate Per Bed | CY Avg Rate Per Bed | Growth % |
|--------|---------------------|---------------------|----------|
| STUDIO | \$1,519 | \$1,569 | +3.2% |
| 1 | \$1,479 | \$1,530 | +3.5% |
| 2 | \$1,045 | \$1,075 | +2.9% |
| 3 | \$843 | \$902 | +7.0% |
| 4 | \$885 | \$908 | +2.5% |
| 5 | \$996 | \$1,045 | +4.9% |
| 6 | \$1,061 | \$1,107 | +4.4% |

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

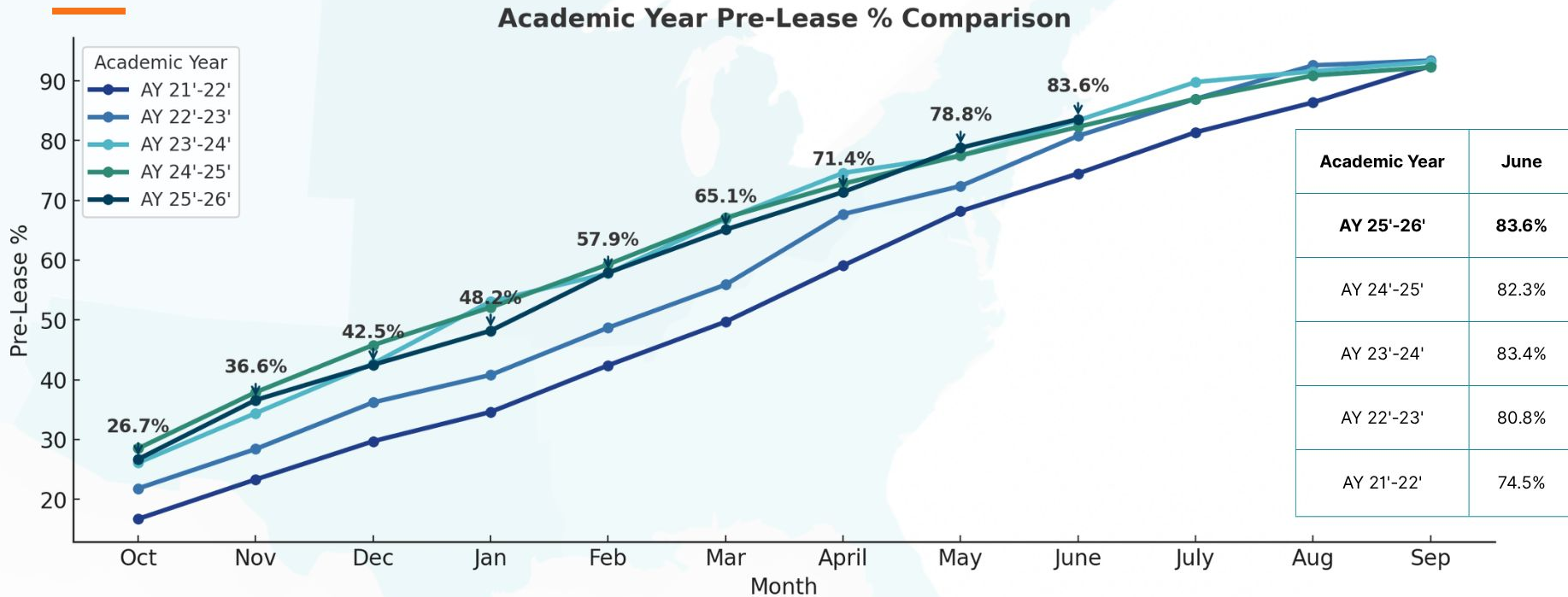


Floor Plan Rate Trends 24'-25' vs. 25'-26'



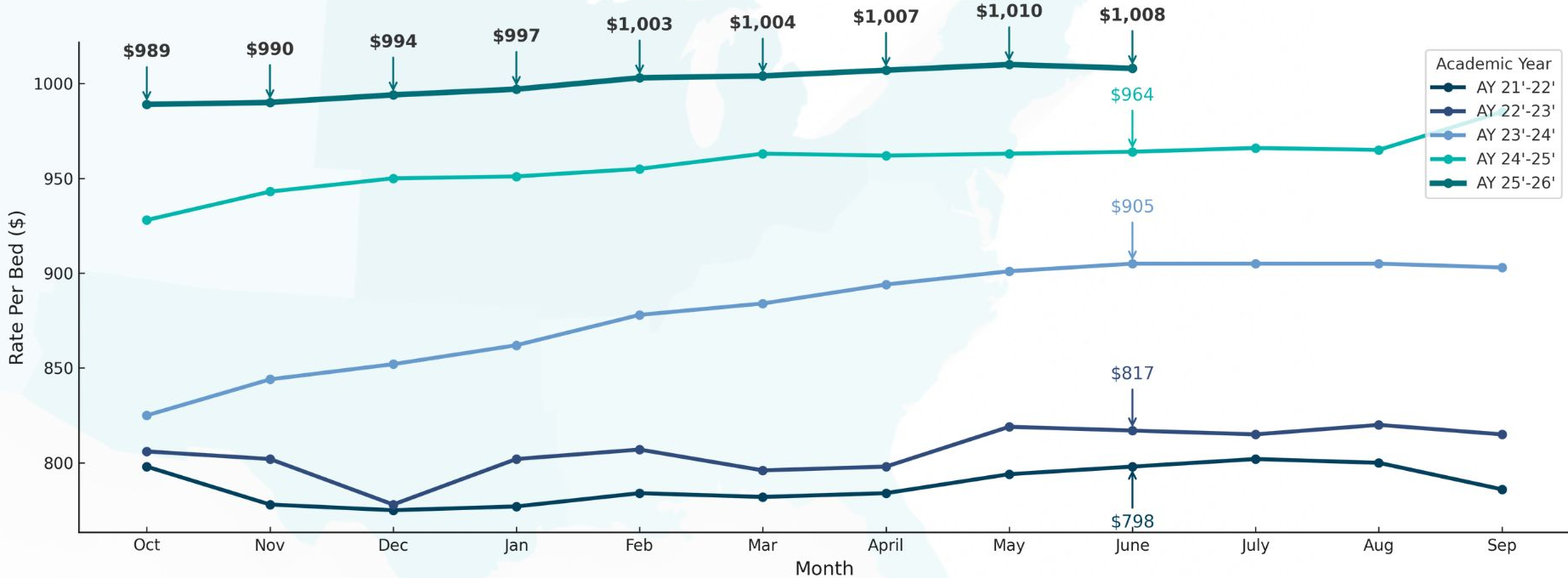
5 Year MoM Trend Graph

National Average Pre Lease as of July 3, 2025



5 Year MoM Trend Graph

National Average Rate per Bed as of July 3, 2025



Contact College House Today to Learn More



Contact

House Analytics
3495 Piedmont Road NE
Suite No. 402, Building 12
Atlanta, GA 30305

www.collegehouse.com
info@collegehouse.com

