



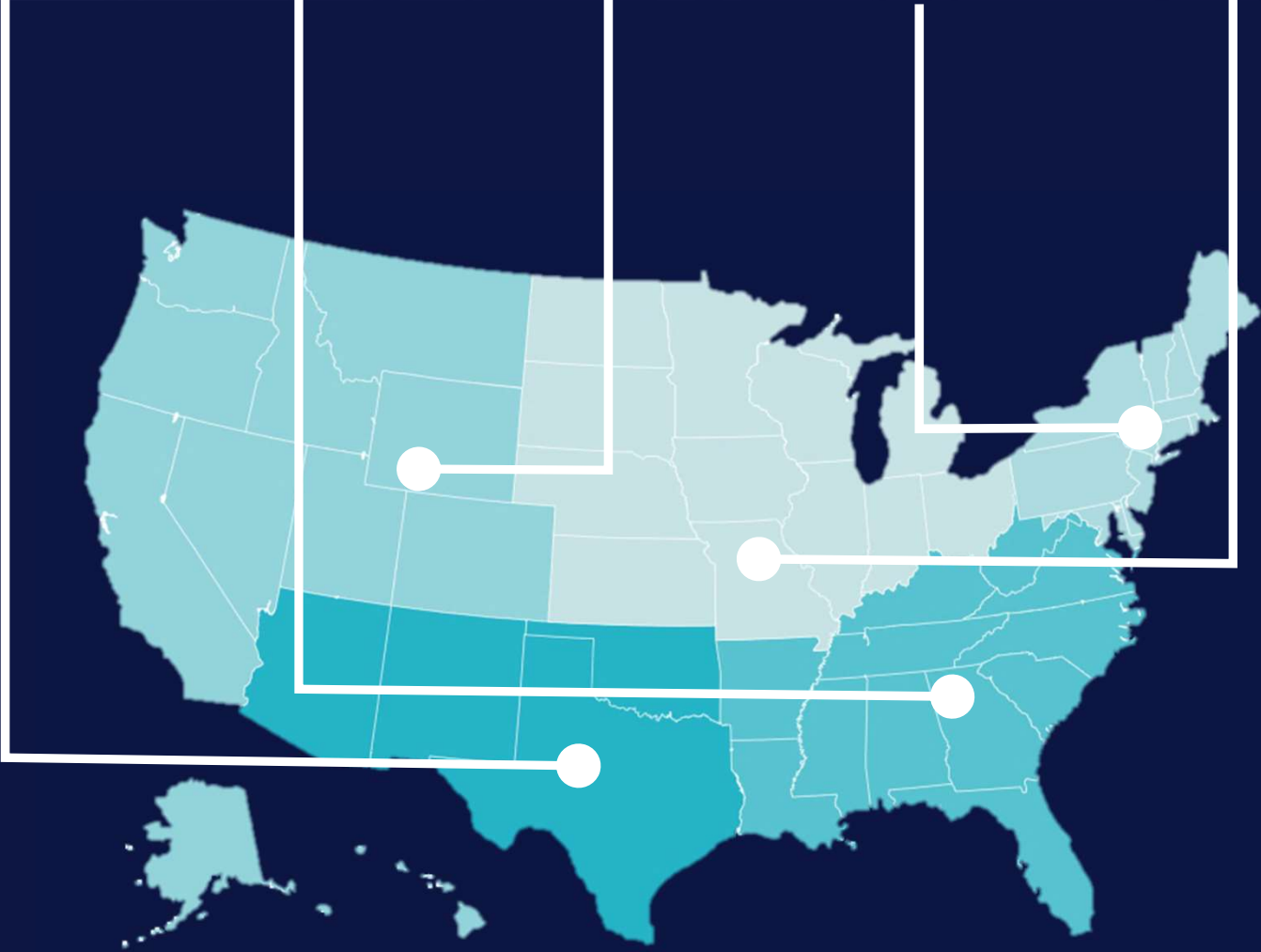
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# U.S. STUDENT HOUSING PRELEASING REPORT

COLLEGE @ HOUSE

# PRELEASE BY REGION

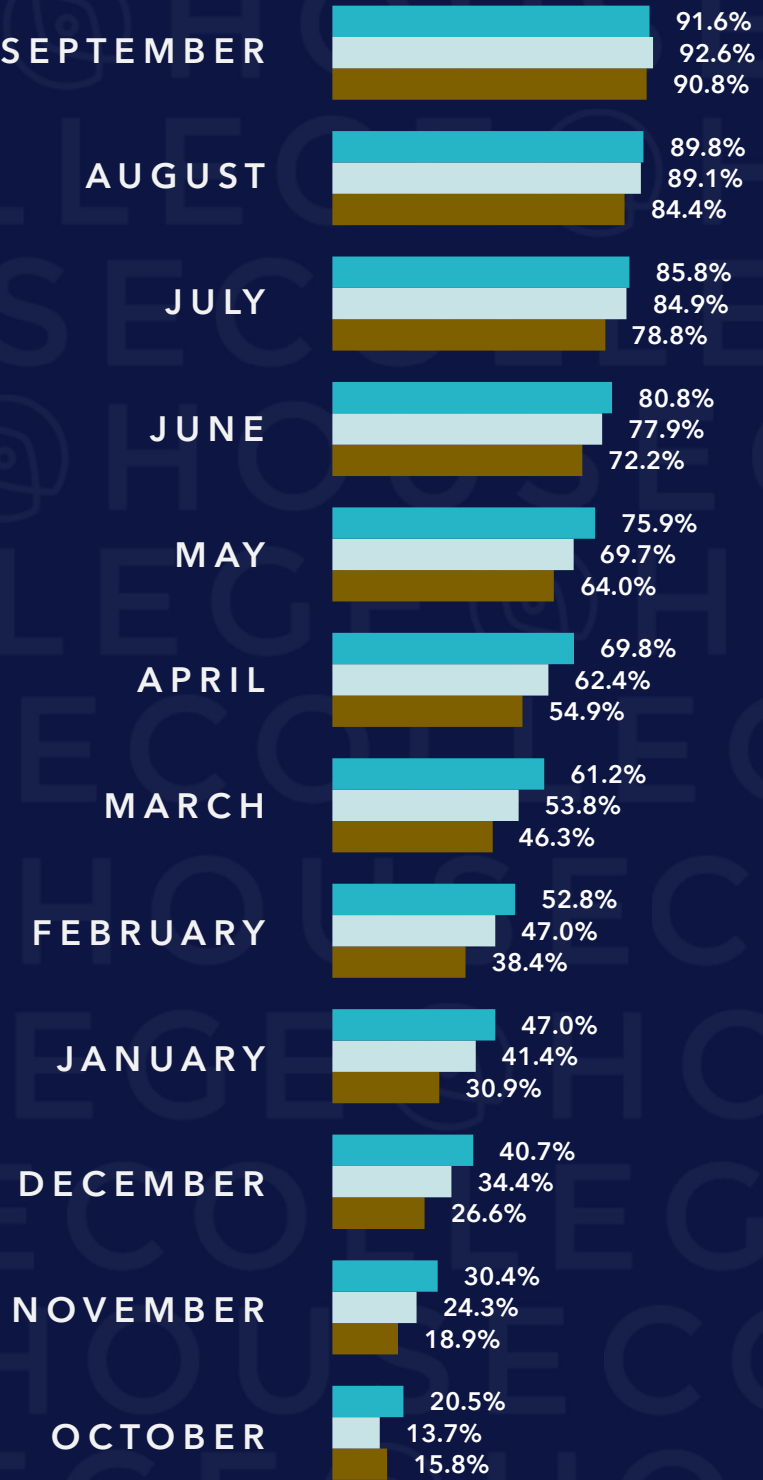
SW	SE	W	NE	MW
93% <sub>PRELEASE</sub>	92% <sub>PRELEASE</sub>	91% <sub>PRELEASE</sub>	90% <sub>PRELEASE</sub>	88% <sub>PRELEASE</sub>
1.0% <sub>YOY</sub>	-1.0% <sub>YOY</sub>	-1.1% <sub>YOY</sub>	-3.4% <sub>YOY</sub>	-3.4% <sub>YOY</sub>
\$876 <sub>RATE</sub>	\$854 <sub>RATE</sub>	\$1,041 <sub>RATE</sub>	\$1,114 <sub>RATE</sub>	\$845 <sub>RATE</sub>
11.9% <sub>YOY</sub>	11.7% <sub>YOY</sub>	9.8% <sub>YOY</sub>	7.8% <sub>YOY</sub>	9.0% <sub>YOY</sub>



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# HISTORICAL PRERELEASE RATE

2021-2022 Academic Year    2022-2023 Academic Year    2023-2024 Academic Year



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# AVERAGE RENT PER BED

## BY DISTANCE TO CAMPUS

LESS THAN **0.5  
MILES**

**\$1,048**

RENT PER BED

**8.8%** YOY CHANGE

**91% -1.6%**

PRELEASE  
RATE

YOY  
CHANGE

**0.5 - 1.5  
MILES**

**\$924**

RENT PER BED

**9.5%** YOY CHANGE

**92% -1.5%**

PRELEASE  
RATE

YOY  
CHANGE

**MORE THAN 1.5  
MILES**

**\$738**

RENT PER BED

**10.8%** YOY CHANGE

**91% -1.3%**

PRELEASE  
RATE

YOY  
CHANGE

### TOTALS

**\$905**

AVERAGE  
RATE PER BED

**11.0%**

INCREASE FROM  
AUGUST 2022

**91.6%**

PRELEASE  
RATE

**-1.0%**

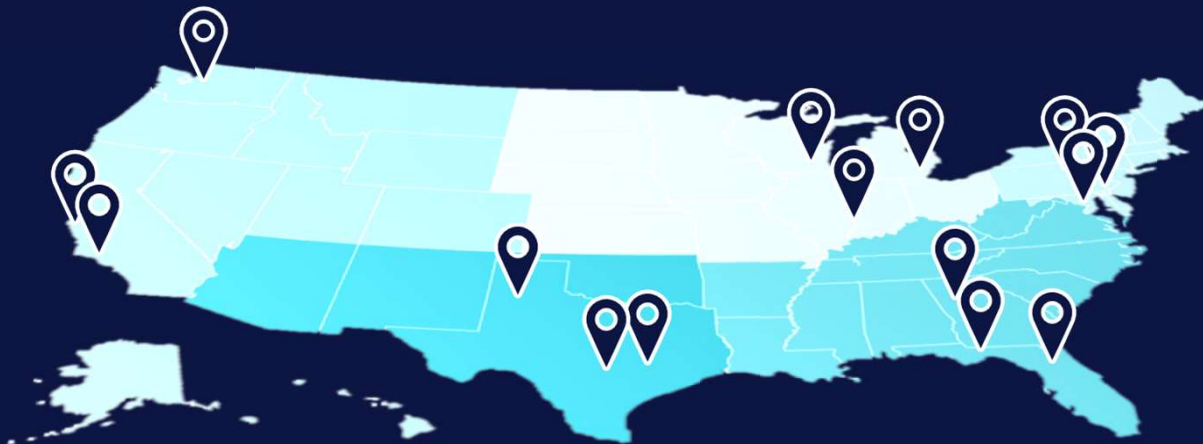
YOY  
CHANGE

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# DEVELOPMENT PIPELINE

## IN LEADING MARKETS

	PIPELINE	BEDS	AVG RATE	PRELEASE
Austin	6.5K	32.2K	\$1,203	94%
College Station	3.6K	40.4K	\$823	95%
Lubbock	2.1K	18.7K	\$683	88%
Tallahassee	7.5K	35.7K	\$910	94%
Atlanta	5.3K	17.5K	\$1,344	94%
Gainesville	5.1K	33.4K	\$942	91%
Los Angeles	5.1K	14.9K	\$1,598	82%
Seattle	3.8K	9.6K	\$1,442	78%
Berkeley	2.5K	5.7K	\$2,284	73%
College Park	3.4K	15.7K	\$1,363	90%
Philadelphia	2.3K	14.0K	\$1,265	85%
State College	1.8K	18.3K	\$1,111	96%
Madison	4.5K	10.2K	\$1,154	90%
Bloomington	4.0K	13.2K	\$988	84%
Ann Arbor	3.9K	12.5K	\$1,614	99%



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MCNAIR  
COLLEGIATE  
PARTNERS

DEVELOPMENT



INVESTMENT SALES



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4600 Lohmans Ford Rd, Lago Vista, TX 78645

#### WEBSITE:

[www.mcnaircollegiatepartner.com](http://www.mcnaircollegiatepartner.com)

WEBSITE: <https://collegehouse.com/>

#### Market Report

Overview Universities 1 Properties 75

#### Rental Concessions

##### Concessions By Property

Property Name	Floor Plan	Concessions Value	Type	Description
Signature Heights	1 BEDROOM, 1 BATH	\$30	Monthly	Rent Credit
North Campus Apartments	1 Bed - 1 Bath A - SMART	\$100	Monthly	Rent Credit
Student Lofts	2/2 B1	\$10	One Time	Rent Credit
Westside Flats	2x2 X - Bedroom A	\$245	Monthly	Rent Credit

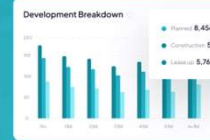
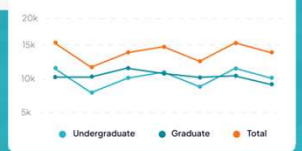
#### Leasing Availability

Beds Occupied	Beds Available	Beds Pre-Leased	Beds Available, Pre-Lease
24,559	1,131	24,203	3,422



Current Total Enrollment  
16,735  
9% YOY

#### Enrollment Trends



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