

NOVEMBER 2024

# Student Spring Survey Report

Do Generation Z students have  
specific drivers of satisfaction?



# Executive Summary

Do Generation Z students have specific drivers of satisfaction? J Turner's recent study tested a student's theory that security, timely and quality maintenance, and quality amenities are crucial factors influencing the satisfaction of college students.

Specifically, the study examines how the perceived level of security and safety, maintenance response efficiency and quality, along with high-quality amenities in student residences influence the likelihood of students renewing their leases and referring their friends.

## SURVEY INSIGHTS

J Turner Research conducted a comprehensive survey to better understand students' experiences in their off-campus student apartment communities. The survey included open-ended questions, allowing students to explain concerns and experiences, as well as multiple-choice questions, quantifying specific aspects of their living situation. From their scores, J Turner Research calculated the Spring Index: an aggregated score representing an average of all quantitative responses from each respondent about their living experience. Respondents were also asked to provide ratings for their likeliness to renew their lease and refer a friend on a scale from one to ten, with ten indicating the highest likeliness to renew/refer.



# Key Metrics

- **Spring Index:** An aggregated satisfaction metric to questions about the overall living experience.
- **Renewal Rate:** The likelihood of residents to renew their lease for another year.
- **Referral Rate:** The willingness of residents to refer their friends to live in the community.
- **Benchmark Rate:** A standard or reference point used to compare performance across different metrics, such as satisfaction, renewal, and referral rates.
  - Spring Index Benchmark: 6.72
  - Renewal Rate Benchmark: 5.28
  - Referral Rate Benchmark: 6.07

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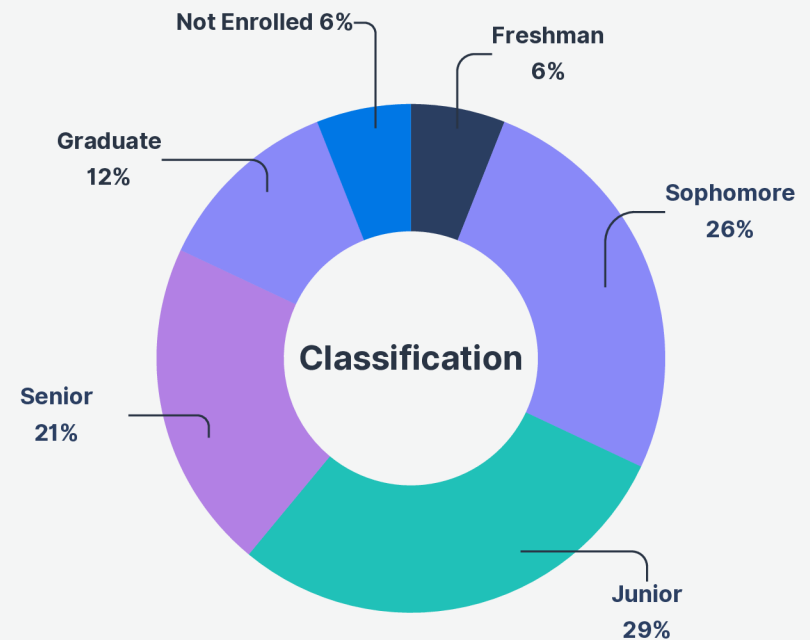
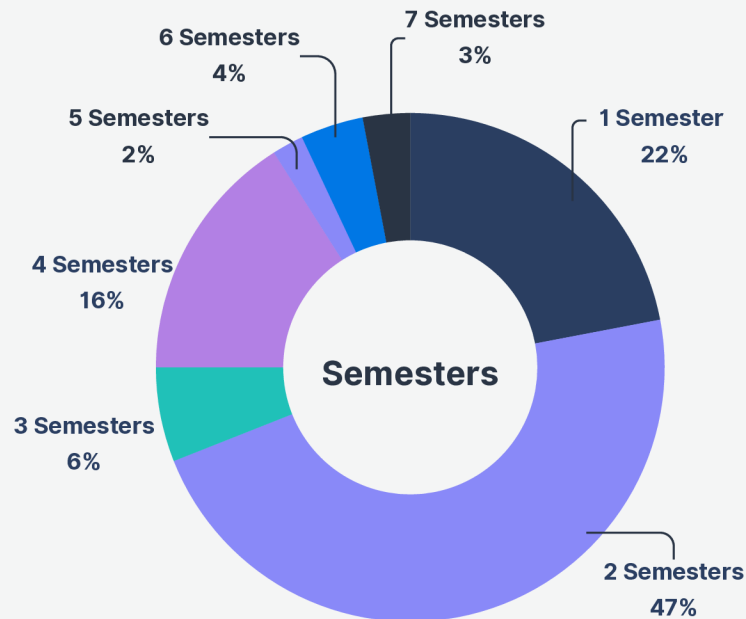
## METHODOLOGY

The theory that security, timely and quality maintenance, and high-quality amenities are crucial factors in influencing college students' satisfaction was tested by analyzing **6,661** comments left by student residents. Residents were categorized by whether they left complaints in these operational areas. J Turner Research identified **1,302** complaints related to Security, Maintenance, and Amenities. These complaints were organized into nine subcategories within these primary categories, further detailed in the Breakdown of Categories section. The average metric score for each category and subcategory was then calculated, providing a quantitative evaluation of how these factors impacted resident satisfaction, likelihood to renew, and likelihood to refer friends. Based on how these compared to benchmark rates, the categories could be defined as areas that are impactful or negligible in having quantifiable impact on Gen Z student satisfaction.

# Demographics

This study was conducted with survey results from **17,743** student participants living at student housing locations across the nation. The demographics offer key insights into the composition of the respondents. Notably, 47% of respondents have lived in their current housing for two semesters.

The next two largest tenure groups have lived at their respective residences for 1 semester (22%) and 4 semesters (16%). Juniors make up the largest classification group at 29%, while sophomores follow closely behind at 26%. 62% of respondents are upperclassmen, 32% are underclassmen, and 6% are not enrolled or are not students.

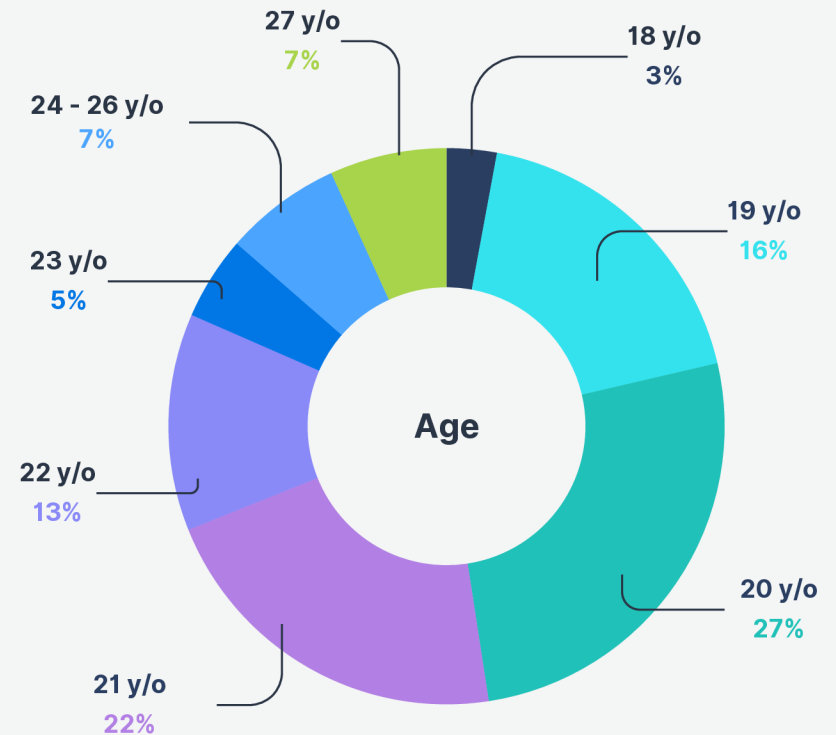
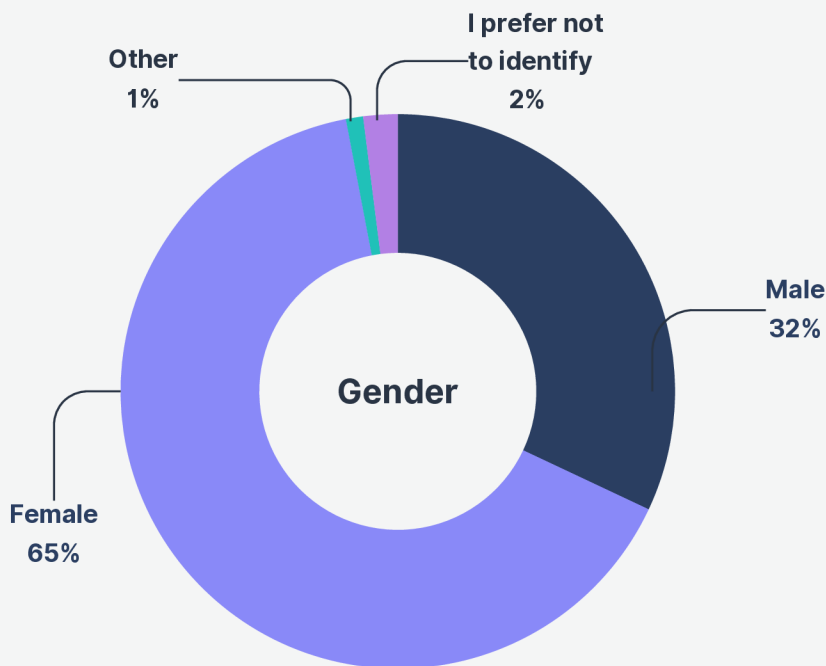




# Demographics

Female students comprise a significant majority of the respondents at 65%, while male students represent 32%. 3% of respondents identify as another gender or prefer not to identify.

The largest group of respondents are aged 20 and 21, together comprising nearly 50% of the total respondents. Ages 18 to 19 represent 19% of respondents, 22-year-olds account for 13%, and 23-year-olds make up 19%.



# Breakdown of Categories

The study bucketed complaints left by student residents. The subcategories represent the most common and pressing issues raised by residents concerning security, maintenance, and amenities. The categorization process involved a thorough analysis of open-ended comments to identify recurring themes and concerns. By grouping these comments into operational categories, the research aimed to provide a clear framework for understanding the specific areas where student housing properties excel or fall short.

## Security

- **General Safety:** Concerns or frustrations about feeling unsafe on the property.
- **Lighting:** Issues regarding inadequate lighting outside the unit.
- **Controlled Access:** Concerns about gates and doors not shutting properly.
- **Interpersonal Conflicts:** Comments about individuals living or working in the building making residents feel unsafe.

## Maintenance

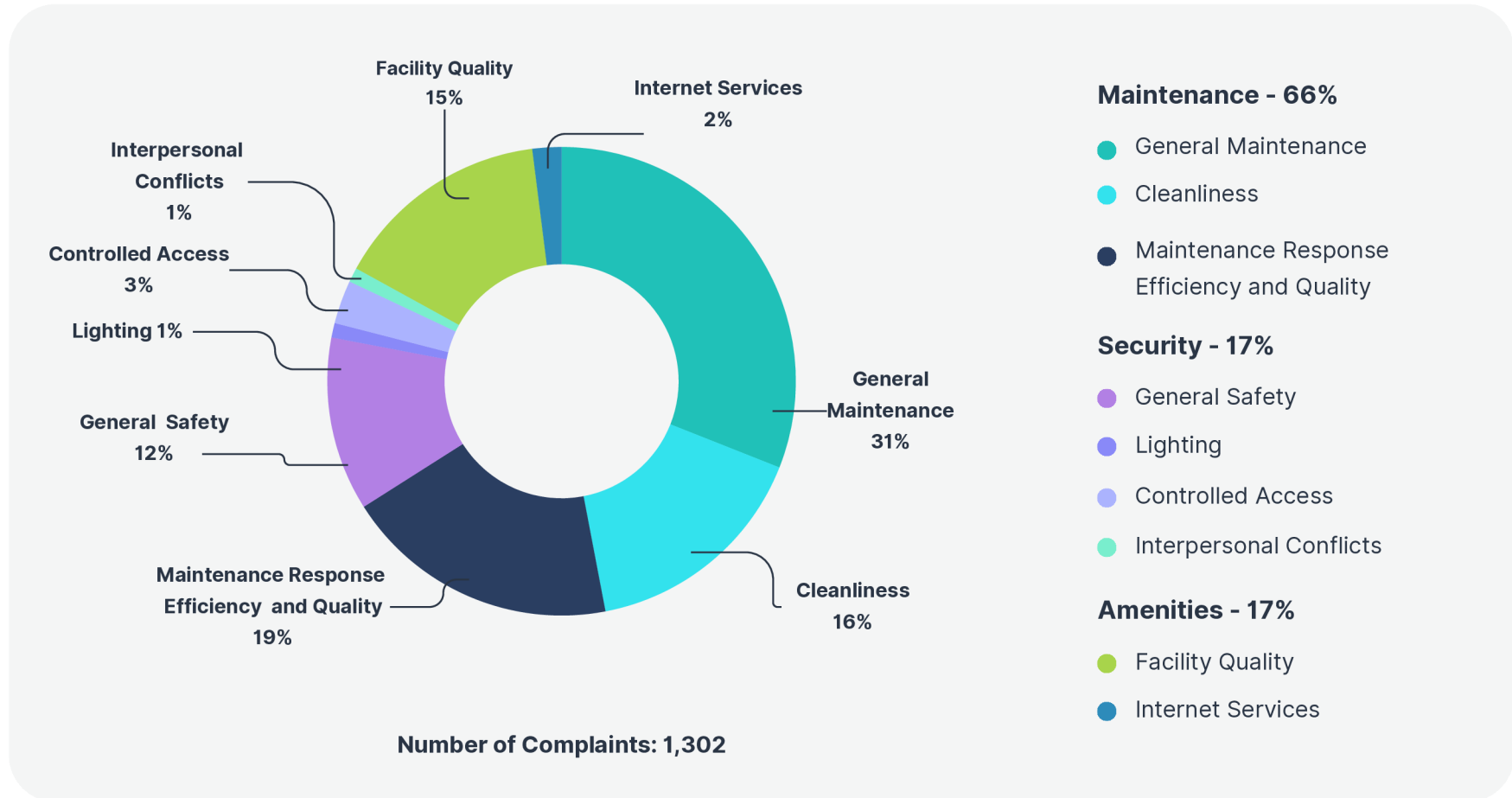
- **General Maintenance:** Concerns or frustrations about things being broken or not working around the property such as gates, lightbulbs, and elevators, as well as issues inside the unit, including plumbing, electrical systems, and appliances.
- **Cleanliness:** Issues related to the cleanliness of the property including common areas such as hallways, trash rooms, elevators, etc.
- **Maintenance Response Efficiency and Quality:** Frustrations about the response time and quality of work from maintenance staff.

## Amenities

- **Facility Quality:** Concerns or frustrations about the quality and availability of physical amenities such as the gym, pool, and common areas.
- **Internet Services:** Concerns or frustrations about prolonged internet disconnectivity or extremely slow connection speed.

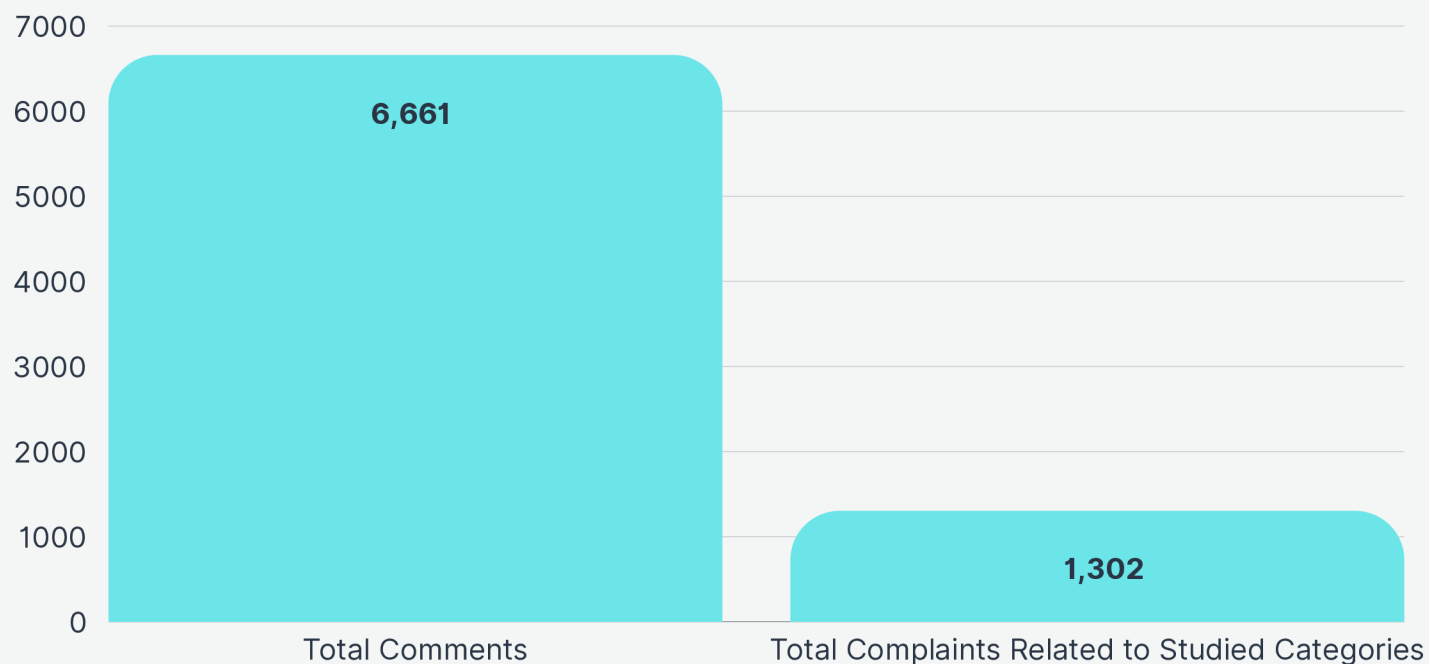
# Percentage of Complaints by Subcategory

The chart below shows a percentage breakdown of complaints by subcategory.



# Total Comments vs Total Complaints

While this chart shows that most comments are not related to the categories in this study, this does not suggest that the rest of the comments are positive. The vast majority were at least somewhat negative but were not about maintenance, security, or amenities.



# Key Findings

## INSIGHTS INTO STUDENT HOUSING SATISFACTION



### Generation Z Students Have Unique Drivers of Satisfaction

**Security is a Top Priority:** Security is one of the most important factors for Generation Z students, particularly among females and upperclassmen. These students consistently report that a lack of enhanced safety measures, such as installed cameras, secure and controlled access, and policies to maintain a safer community environment negatively affects their satisfaction and decisions to renew leases.

**Higher Expectations for Amenities:** Gen Z places a strong emphasis on the quality and availability of amenities. Students express dissatisfaction when communal facilities are poorly maintained or unavailable, as seen in lower satisfaction scores from those who complained about facility quality. This underscores the need for improvements in this area.



### Security is a Significant Concern

**Low Satisfaction Scores Across the Board:** Security-related concerns consistently have low scores across all metrics. Residents who complained about General Safety, Controlled Access, and Interpersonal Conflicts reported scores well below the Spring Index, Renewal Rate, and Referral Rate benchmarks, highlighting substantial dissatisfaction when security issues arise.

**Female and Upperclassmen Concerns:** Female students express significantly more dissatisfaction with security issues compared to males. While females account for 65% of the total respondents, they contribute to 75% of security-related complaints. Upperclassmen also report more security-related concerns.



# Key Findings

## INSIGHTS INTO STUDENT HOUSING SATISFACTION



### Maintenance Requires Improvement in Key Areas

**Positive Perception of General Upkeep Masks In-Unit Deficiencies:** While complaints about general property maintenance do not result in low scores, it is overshadowed by negative experiences with in-unit maintenance, specifically cleanliness and responsiveness. This discrepancy indicates a misplaced focus and highlights the need to shift resources and attention to in-unit maintenance.

**In-Unit Issues Directly Impact Retention:** Failing to address in-unit maintenance concerns like cleanliness and response times directly contributes to lower lease renewals. This underscores the importance of prioritizing these areas to improve resident retention and overall satisfaction.



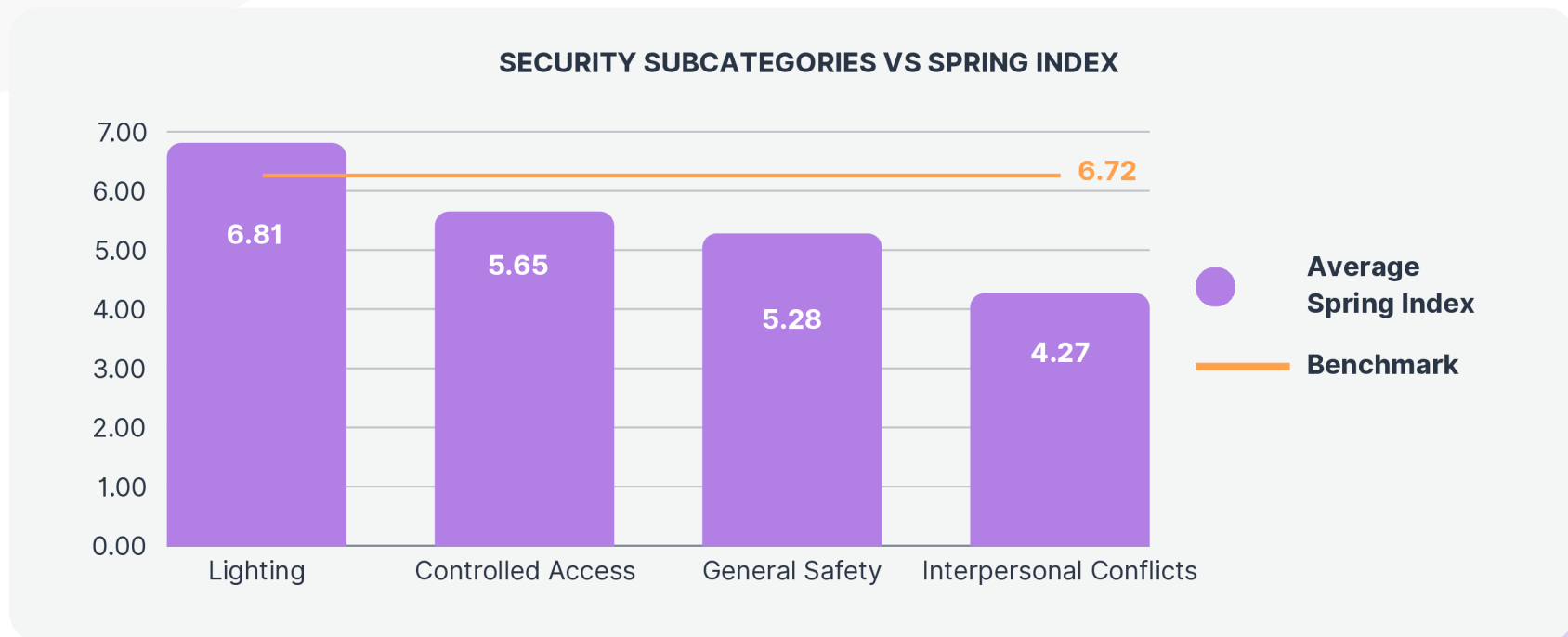
### Amenities Are Important to the Student Living Experience

**Amenities Strongly Influence Lease Decisions:** Many residents indicated that amenities were a primary reason for signing their lease and expressed significant frustration when these amenities were unavailable for extended periods. Both points corroborate with J Turner Research's previous findings. J Turner Research's proprietary text categorization tool revealed that student residents mention amenities far more frequently than conventional renters. 32.46% of student reviews in 2023 referenced this category compared to only 21.23% of reviews left by conventional residents.

**Internet Scores High, Facility Quality Falls Short:** Residents who complained about internet services still reported relatively high satisfaction, showing that residents could be dissatisfied with internet, but happy overall. However, those who complained about facility quality had lower scores, highlighting that poor maintenance or a lack of upgrades to communal facilities negatively impacts overall satisfaction.

# Security

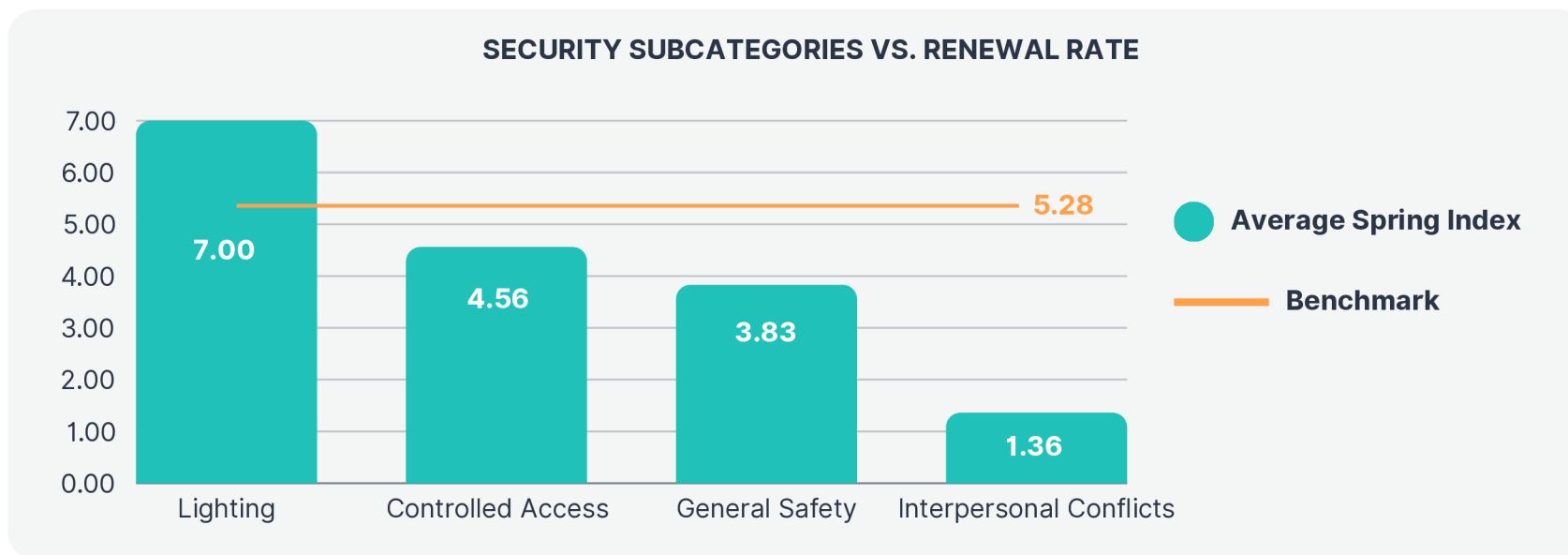
Security is a critical concern for students. The low scores for people who complained about Security across the Spring Index (5.28), Renewal Rate (3.83), and Referral Rate (3.96) highlight the urgency of enhancing safety measures. Comments such as, "If there was security like locked doors, closed garages or cameras it would be much better and I would refer friends here, but this place does not feel safe," deliver a clear need for effective and functioning security systems. Ensuring students feel safe is essential for delivering a positive living experience.



# Security

Complaints about lighting scored above the Spring Index benchmark of 6.72, indicating that lighting-related issues do not significantly impact overall satisfaction compared to other security concerns. However, complaints about controlled access, general safety, and interpersonal conflicts fell below the benchmark, reflecting greater consequence.

In renewal rates, only complaints about lighting scored above the benchmark of 5.28, revealing that lighting issues alone do not have a large negative effect on lease renewals compared to other concerns. Dissatisfaction related to controlled access, general safety, and interpersonal conflicts—where renewal rates were notably low—points to these areas as significant drivers for residents deciding not to renew their leases. The notably low renewal rate with interpersonal conflict complaints presents an opportunity to improve community relations and address interpersonal safety to boost resident retention.



# Do Demographics Matter When Discussing Security?

## GENDER AND SECURITY CONCERNS

Security concerns, especially among female students, significantly impact overall resident satisfaction. Female students, who make up 65% of respondents, consistently report higher levels of concern regarding security. Males also report low scores when experiencing security-related issues, but do so less frequently, making up only 24.6% of security-related complaints compared to 75.4% by females.

Both men and women report significant concerns about interpersonal conflicts, emphasizing the need to improve safety and community relations. However, women are much more sensitive to concerns in the other three subcategories.

### FEMALE SECURITY CONCERNS

SECURITY SUBCATEGORIES	SPRING INDEX	RENEWAL RATE	REFERRAL RATE
General Safety	5.08	3.50	3.77
Lighting	6.53	6.25	6.50
Controlled Access	4.94	4.04	3.66
Interpersonal Conflicts	4.35	1.66	2.22
Benchmarks	6.72	5.28	6.08

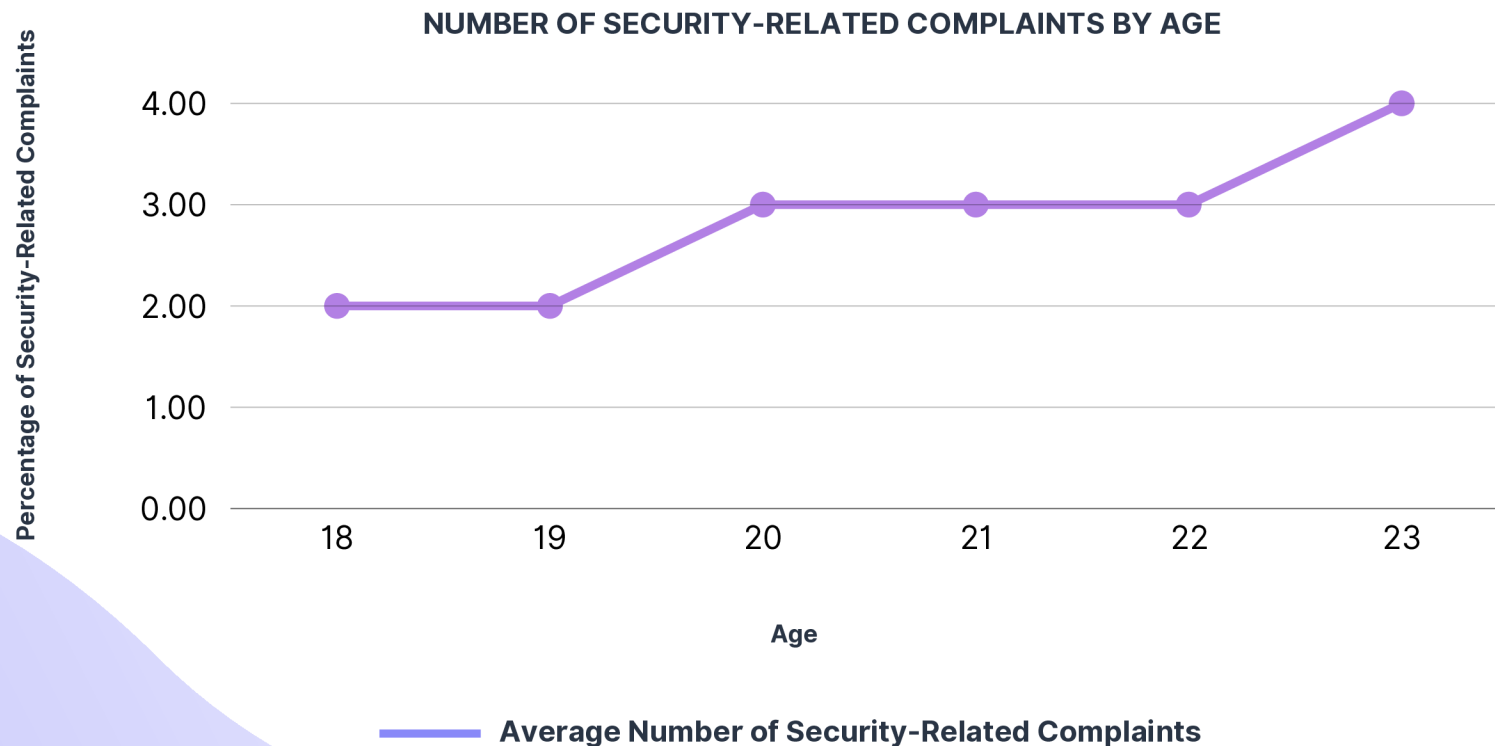
### MALE SECURITY CONCERNS

SECURITY SUBCATEGORIES	SPRING INDEX	RENEWAL RATE	REFERRAL RATE
General Safety	6.08	5.02	6.47
Lighting	7.55	9.00	9.00
Controlled Access	7.01	5.54	6.00
Interpersonal Conflicts	3.89	0	3.50
Benchmarks	6.72	5.28	6.08

# Do Demographics Matter When Discussing Security?

## AGE AND SECURITY CONCERNS

Students aged 20-21, who comprise nearly half (49%) of the respondents, express significant concerns about security. In comparison, younger students aged 18-19, representing 19% of all respondents, report fewer security issues and score slightly more favorably than their older counterparts. In fact, the data shows that security concerns increase as students progress through college. The average number of security-related complaints per respondent gradually increases with age, peaking among students aged 23.





# Do Demographics Matter When Discussing Security?

## CLASSIFICATION AND SECURITY CONCERNS

Juniors and seniors, who together account for 47% of the total respondents, report 55.17% of security-related complaints, showing that this group is more likely to report security concerns than underclassmen. This upperclassmen group reports lower satisfaction scores across all metrics. Freshmen and sophomores reporting fewer security issues and showing higher satisfaction metrics aligns with the age-related findings, illustrating that older students tend to have more security concerns and be more sensitive to how they affect their likeliness to renew/refer.

### FRESHMAN AND SOPHOMORE SECURITY CONCERNS

SECURITY SUBCATEGORIES	SPRING INDEX	RENEWAL RATE	REFERRAL RATE
General Safety	5.43	4.71	4.79
Lighting	8.35	10.00	10.00
Controlled Access	5.04	5.38	3.12
Interpersonal Conflicts	5.42	6.75	3.75
Benchmarks	6.72	5.28	6.08

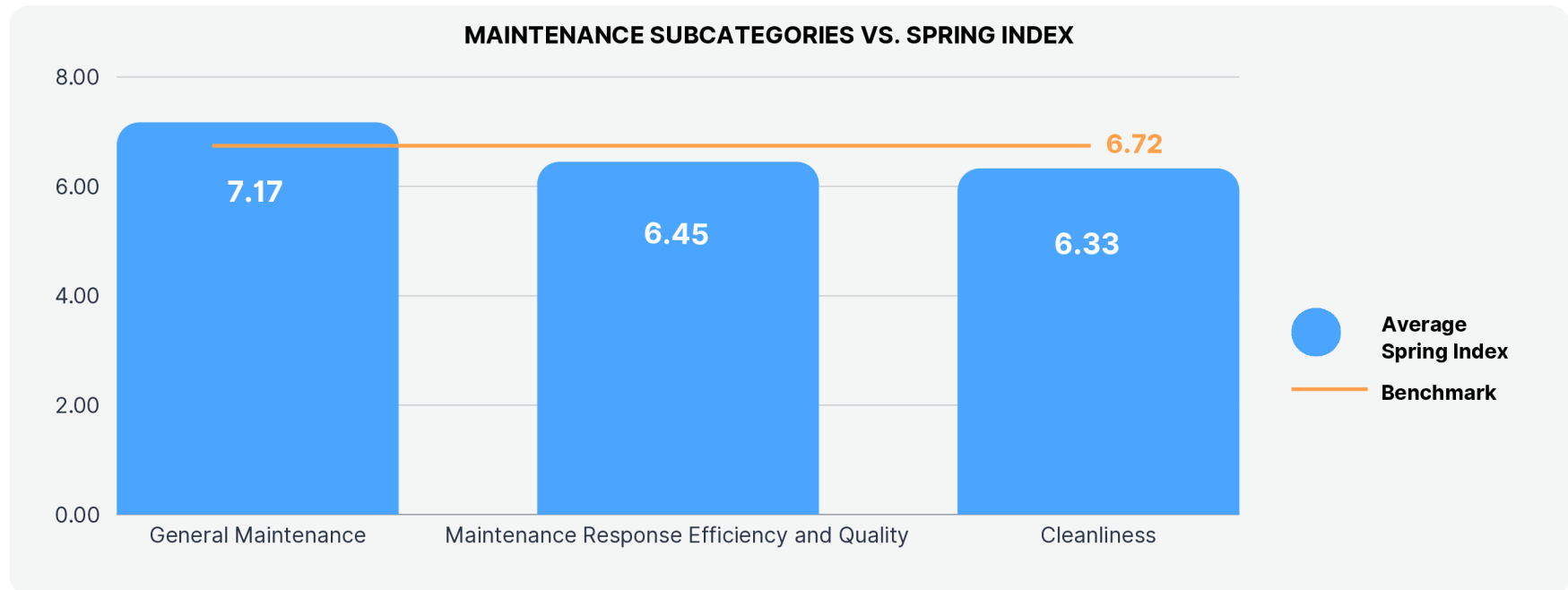
### JUNIORS AND SENIORS SECURITY CONCERNS

SECURITY SUBCATEGORIES	SPRING INDEX	RENEWAL RATE	REFERRAL RATE
General Safety	5.37	3.18	4.02
Lighting	6.47	6.90	5.30
Controlled Access	5.91	4.21	4.45
Interpersonal Conflicts	4.13	3.00	3.00
Benchmarks	6.72	5.28	6.08

# Maintenance

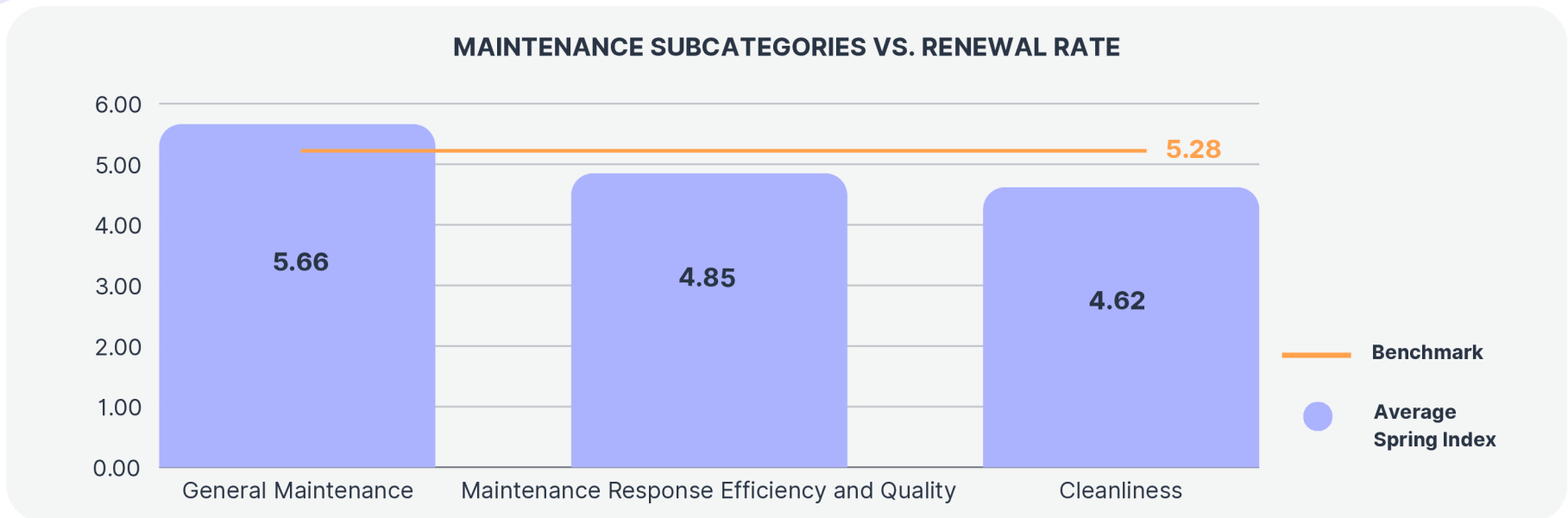
Keeping apartments in optimal condition is important for resident satisfaction and retention, especially during high-turnover periods like student fall move-in. While the overall Spring Index score for Maintenance (6.76) surpasses the benchmark (6.72), a closer look reveals that general property upkeep complaints are the only maintenance concerns that do not reduce overall satisfaction.

Deeper concerns emerge regarding in-unit maintenance, specifically Cleanliness (6.33) and Maintenance Response Efficiency and Quality (6.45), where lower satisfaction scores indicate a direct correlation between negative in-unit experiences and overall resident satisfaction. This suggests that while well-maintained common areas contribute positively, addressing individual unit issues is more important for lease renewals and positive referrals. Residents who have negative in-unit maintenance experiences—such as delayed or unpredictable service—are less likely to be satisfied.



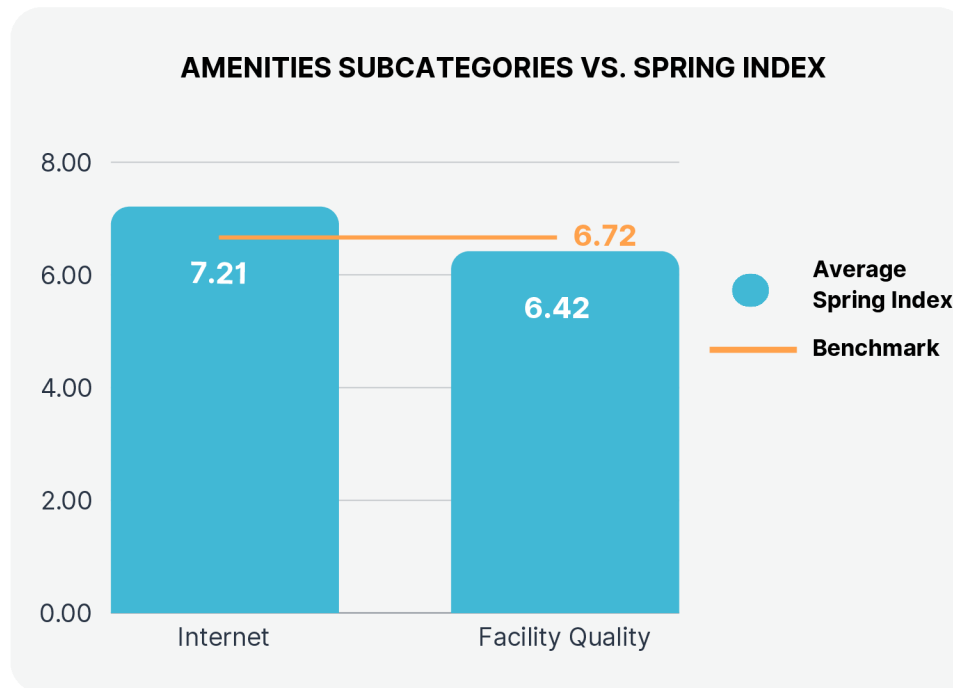
# Maintenance

Likewise, only those complaining about General Maintenance (5.66) had scores exceeding the renewal benchmark of 5.28. On the other hand, residents who complained about Maintenance Response Efficiency and Quality (4.85) and Cleanliness (4.62) reported much lower renewal rates. This demonstrates that inefficiencies in handling in-unit maintenance are likely key contributors to decreased lease renewals. Focusing on improving these areas—particularly in how promptly and predictably maintenance issues are addressed—could boost resident retention.



# Amenities

The quality of amenities is a key factor in shaping the student living experience, with many students signing leases based on the availability of facilities like gyms, pools, and other communal spaces. According to J Turner Research's proprietary text categorization tool, student residents care about amenities far more than conventional residents. In 2023, 32.46% of students' reviews referenced the condition and availability of amenities, compared to only 21.23% from conventional residents.

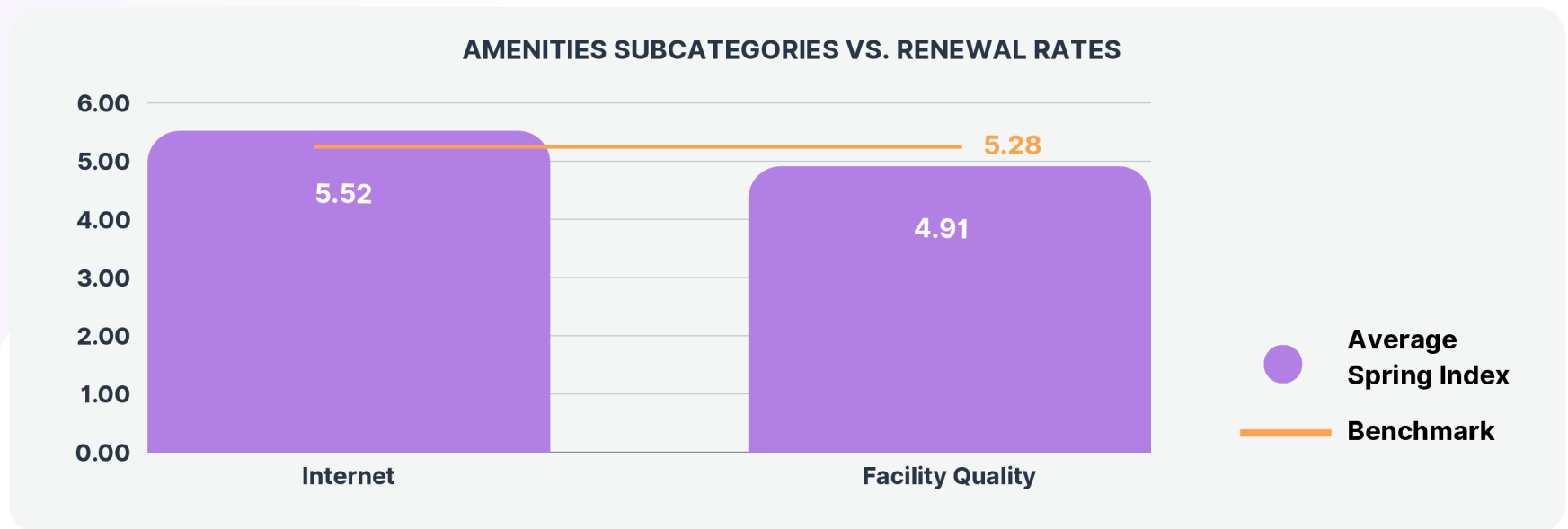


Residents who complained about internet services generally reported satisfaction levels above the Spring Index benchmark of 6.72, indicating that while internet reliability is a concern, it does not significantly drive overall dissatisfaction. Comments such as “Fix the internet! I have had to leave my apartment to do work about two dozen times throughout this semester” were common but did not seem to always lower overall satisfaction scores. In contrast, residents who complained about the condition of shared facilities like gyms and pools expressed greater dissatisfaction, pointing to the importance of these amenities in shaping the overall resident experience.

# Amenities

Looking at Renewal Rates, residents negatively mentioning internet services again exceeded the benchmark. However, residents who complained about facility quality (4.91) reported scores below the benchmark (5.28), suggesting that poor maintenance or lack of upgrades to communal facilities like gyms and pools may lead to lower lease renewal rates. One student's comment reinforces this: "The gym equipment is always broken, and the common areas are not well-maintained. It's frustrating because these were major selling points when I signed the lease." This highlights the need for ongoing attention to the condition of these amenities to ensure higher resident retention.

Ultimately, this analysis reveals a clear hierarchy in student priorities regarding amenities. While reliable internet is desired and its absence noted, well-maintained and functional shared spaces like gyms and pools hold greater sway over resident satisfaction and consequently lease renewals. Investing in the upkeep and quality of these physical amenities appears to be a more impactful strategy for student housing providers aiming to maximize resident retention.





# Recommendations

1

**Safety and Security:** Enhancing security measures, such as locked doors, secure garages, and comprehensive surveillance systems, is essential for ensuring students feel safe and are willing to stay and refer the property to others. Likewise, it is strongly recommended for onsite staff to be trained on standard operating procedures for handling interpersonal conflicts.

2

**Maintenance:** While maintenance overall may not be the strongest driver of satisfaction, the subcategories of cleanliness and maintenance response efficiency fall below the benchmark, evidencing key areas of focus. Implementing more effective and timely maintenance practices, particularly on in-unit needs, will likely enhance the resident experience.

3

**Amenities:** Regular maintenance and upgrades of amenities are necessary to meet students' needs and enhance their overall satisfaction.

4

**Online Reputation:** The people who leave comments on surveys are likely the same people who leave reviews online. If you meet the needs of those who leave their concerns on surveys, you increase your chances of improving your online reputation.

5

**Resident Profile:** Given the findings in this report, a predominant group arises. Because they make up the majority of responses in the Survey, Female juniors aged 20-21 who have lived at their residency for 2 semesters play a crucial role in shaping overall satisfaction and expectations in student housing. Considering this profile in your approach to resident satisfaction efforts may improve the outcomes of your efforts.

# Closing Thoughts

Based on the findings of this study, it is apparent that Generation Z students have unique drivers of satisfaction when it comes to student housing. Gen Z places a strong emphasis on safety and security, especially among female students and upperclassmen. Additionally, while traditional factors like general upkeep remain important, Gen Z students are particularly attentive to the quality and availability of amenities, reflecting their desire for a well-rounded living experience. These insights advocate that to effectively meet the expectations of Gen Z, student housing providers must prioritize safety and ensure high-quality amenities. In contrast, general maintenance and internet maintenance should not be viewed as a primary allocation of resources for student renters. They still play a role, but should not come at the expense of compromising dedication to high standards of security and amenities maintenance. By addressing these specific needs, property managers can create a more appealing and satisfying environment for this generation.

