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The Aggregated POP Surveys: The Singles

As part of our Project Opening Plan reports, we conducted telephone surveys of over 1,100 shoppers at upscale apartment communities across the country. Recently, we aggregated the results of these surveys, bringing you the overall results and profiles of married shoppers with and without children, and serious shoppers and browsers. In this article, we profile single apartment shoppers by household type. We found significant differences among singles regarding amenity preferences, income, and tenure .

The Categories

Like married households, single households are not a monolithic group. In the course of analyzing the POP data, we identified four distinct groups based on household size and the presence of children: Loners (singles living alone), Doublers (singles living with one roommate not a child), Groupers (those living with two or more roommates, none of which are children) and Parents (those with children regardless of household size). The sex of the occupants was not taken into account in these groupings. Therefore, a Doubler household could include two roommates of the same sex, or it could include two members of the opposite sex cohabitating.

These categories reflect typical housing arrangements for households containing single persons. In addition, they also represent the household types that your rental agents are likely to see, and that developers need to consider when designing and targeting new product.

A distribution of these single households by type indicates that Loners are the most prevalent (43.8%), followed by Doublers (27.4%), Groupers (15.1%), and Parents (13.6%). It is important to remember that each of these respondents represents one apartment unit. Therefore, this distribution is a reasonable indication of the mix of single people that you can expect to shop your community.

Marital Status

While all of the respondents profiled in this article are single, the overall results are important to note. Of

the overall respondents, 45.6% were married, 42.3% identified themselves as single, 8.6% said they were divorced/separated, and 3.5% were widowed. The percentage of divorced/separated and widowed respondents could be higher, as respondents were asked to identify themselves and many in those categories may have identified themselves as single.

Of the subject group respondents, 77.8% reported being single, 15.8% reported being divorced/separated and 6.4% reported being widowed. The Groupers had the highest percentage of singles, the Parents had the highest percentage of divorced/separated respondents, and the Parents had the highest percentage of widowed respondents:

Marital Status	Loners	Doublers	Groupers	Parents
Single	72.4%	87.9%	90.5%	60.0%
Divorced/ Separated	17.8%	7.5%	7.4%	36.4%
Widowed	9.8%	4.6%	2.1%	3.5%

Household Size

While household size is set by definition for Loners and Doublers, it is not for the other two groups. Of the Groupers, 67.4% lived in a three-person household, 30.5% lived in a four-person household and 2.2% lived in a household with five or more persons.

Of the Parents, 24.7% lived in a two-person household, 34.1% lived in a three-person household, 20.0% lived in a four-person household, 14.1% lived in a five -person household and 7.1% lived in a household of six or more. Note that the majority of these householders have only one child, yet most live in households larger than two. Given the high number in this group currently living with parents or friends, it appears that many of these households are doubling up. The apartment search may be an effort to establish a separate household.

Age

A distribution of households by age indicates that there appears to be a tendency for single households to progress from Grouper or Doubler status to Loner

status. Almost two-thirds (63.2%) of all Groupers and almost half of Doublers (48.6%) are in the 18 to 24 age range, while only 15.9% of the Loners are in this category. Half (50.0%) of Loners fall into the 25 to 34 age range. Median ages range from a low of 22.5 years for Groupers to a high of 30.8 years for Loners.

Age	Loners	Doublers	Groupers	Parents
18 to 24	15.9%	48.6%	63.2%	37.6%
25 to 34	50.0%	35.3%	26.3%	38.8%
35 to 44	15.6%	6.4%	3.2%	16.5%
45 to 54	5.1%	5.8%	4.2%	4.7%
55 to 64	5.8%	2.9%	2.1%	2.4%
65 or over	7.6%	1.2%	1.1%	1.2%
Total	100.0%	100.0%	100.0%	100.0%
Median	30.8 years	24.4 years	22.5 years	30.4 years

Children

The Parents group represents 13.6% of the single households and 7.4% of all households surveyed. Over two-thirds of the Parents (67.1%) had only one child, while 30.6% had two children, 1.2% had one child, and 1.2% had five or more children. By definition, none of the other groups contain children.

Current Residence

Doublers (70.5%) and Loners (69.6%) are much more likely than the other two groups to live in an apartment. Groupers (71.5%) and Parents (60.0%) are much more likely to currently live in a single-family home, as indicated on the following chart.

Current Residence	Loners	Doublers	Groupers	Parents
Single-family	25.0%	21.3%	71.5%	60.0%
Apartment	69.6%	70.5%	22.1%	34.1%
Condominium	1.1%	1.2%	2.1%	2.4%
Double/Duplex	3.6%	2.9%	2.1%	3.5%
Mobile Home	0.4%	4.0%	1.0%	1.2%
Other	0.4%	0.0%	1.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%

These residence types should be considered in conjunction with figures on ownership or rentership. Not surprisingly, Doublers (82.1%) and Loners (75.7%) are the most likely to be renters. Groupers

(55.8%) and Parents (29.4%) are the most likely to be living with parents or friends. Parents are also the most likely to be owners (31.8%).

Given the high percentage in single-family residences, the high percentage living with parents/friends, and the low median age, it is likely that Groupers are moving away from home for the first time. In addition, given the amount of shared housing around large universities, many may be starting their first post-college household.

Status	Loners	Doublers	Groupers	Parents
Rent	75.7%	82.1%	32.6%	38.8%
Own	17.0%	6.9%	11.6%	31.8%
Live with Parents or Friends	6.9%	11.0%	55.8%	29.4%

Likelihood of Moving

We asked respondents how likely they were to move in the next 12 months. The Parents (68.2%) were most likely to move, followed by the Groupers. The Loners (34.7%) were least likely to move, as indicated on the following chart.

Likelihood of Moving	Loners	Doublers	Groupers	Parents
Very Likely	34.7%	46.4%	62.3%	68.2%
Somewhat Likely	27.1%	23.1%	15.1%	11.8%
Not at all Likely	23.7%	25.4%	15.1%	20.0%
Not too Likely	14.5%	5.2%	7.5%	0.0%
Total	100.0%	100.0%	100.0%	100.0%

When asked into what type of housing they were planning to move, the Loners (85.0%) were the most likely to plan to move into an apartment, followed by the Groupers (81.9%). The Parents were the most likely to plan to move to a single-family home (10.4%) or a condominium (7.5%), as indicated on the following chart.

Type of Housing	Loners	Doublers	Groupers	Parents
Apartment	85.0%	79.2%	81.9%	73.5%
Single-family	8.3%	9.1%	2.8%	10.4%
Condominium	2.8%	2.5%	6.9%	7.5%
Other	3.9%	8.3%	8.3%	8.9%

Tenure

An examination of tenure patterns indicates that the groups living in their current residence the longest are the Parents (35.2 months median) and the Groupers (35.0 months median), with the Doublers having lived in their current residence the least time (11.0 months median).

The Groupers figure is influenced by the large number of householders currently living with parents or friends. A total of 28.4% of the Groupers have lived in their current residence for ten or more years, likely reflective of the number of Groupers living with their parents.

It is important to remember that the Parents are the most likely to be seriously looking for an apartment. Therefore, once they find the place they need, they are likely to stay longer, and to only walk into your rental office when they are serious about moving.

Length of Time at Current Residence	Loners	Doublers	Groupers	Parents
Under 3 months	13.4%	23.1%	16.8%	10.6%
3-6 months	8.0%	9.8%	7.4%	7.1%
7-9 months	1.8%	7.5%	7.4%	0.0%
10-12 months	10.9%	14.5%	9.5%	9.4%
13-18 months	12.3%	8.7%	2.1%	5.9%
19-23 months	6.9%	7.5%	0.0%	8.2%
2.0-2.9 years	18.5%	10.4%	7.4%	9.4%
3.0-4.9 years	12.7%	7.5%	11.6%	9.4%
5.0-6.9 years	8.7%	1.7%	4.2%	10.6%
7.0-9.9 years	2.5%	2.9%	5.3%	2.4%
10+ years	4.3%	6.3%	28.4%	27.1%
Total	100.0%	100.0%	100.0%	100.0%
Median (months)	20.6	11.0	35.0	35.2

Employment Status

Over four-fifths of all groups are employed full-time, with the highest employment rate found among the Parents group at 88.2%. Not surprisingly, the highest percentage of retirees is found among the Loners (10.1%). Also, the highest percentage of part-time employees is found among the Groupers; perhaps this is one reason why they have been sharing housing.

Employment Status	Loners	Doublers	Groupers	Parents
Full-time	81.4%	84.4%	83.2%	88.3%
Part-time	4.0%	6.4%	10.5%	8.2%
Retired	10.1%	3.5%	1.1%	1.2%
Unemployed	4.0%	5.8%	5.3%	2.4%

Income

The Groupers have the highest median household income (\$27,149). By definition, however, this is an income for at least three adults. Divided by three persons, this is \$9,049 per person. This is particularly important given the high percentage of Groupers (71.2%) who said that cheaper prices/rent was "very important" as indicated in the amenity analysis below. Those who would develop product to appeal to this segment must price and design their product to make shared living affordable and convenient.

Similarly, the Doublers median income of \$24,838 leaves a per-person income of \$12,419. It is likely that one reason these households have doubled up is cost.

The Parents median income was the second-highest (\$25,646). This income must support at least one child. Parents were the second-most concerned group (64.2%) regarding finding cheaper prices/rent. This group also had the highest percentage of respondents making under \$10,000 (5.9%).

The Loner median income was the smallest (\$23,843). However, this is the income for one person. These persons likely live alone not only because they want to, but also because they can afford to.

Household Income Before Taxes	Loners	Doublers	Groupers	Parents
Under \$10,000	4.9%	6.4%	4.8%	6.4%
\$10,000-\$19,999	27.9%	25.5%	27.4%	26.9%
\$20,000-\$29,999	44.9%	37.8%	25.0%	29.4%
\$30,000-\$39,999	18.2%	14.0%	15.5%	11.5%
\$40,000-\$49,999	3.2%	12.1%	9.5%	7.7%
Over \$50,000	0.8%	4.5%	17.9%	17.9%
Total	100.0%	100.0%	100.0%	100.0%
Median	\$23,843	\$24,838	\$27,149	\$25,646

Amenities

As indicated in the table in the next column, each group has differing amenity preferences. All groups agreed on the importance of washer/dryer hookups and plush carpeting as the two most important amenities, but afterwards there were some wide disparities.

For example, a better school district was "very important" to 59.6% of the Parents, but to less than 25.0% of the other three groups. Other amenities particularly valued by the Parents group were larger units, a self-cleaning oven, a frost-free refrigerator, being closer to employment and being closer to shopping. It is not surprising that these amenities would be particularly important to single-parent householders, given that almost 90% are employed full-time and that they must still do housework.

The Loners placed particular emphasis on storm doors/windows, balconies/patios, all first-floor units and a swimming pool. These preferences tend to reflect the split in this group between the younger singles and the higher number of elderly. It should also be noted that the Loners placed the least value of the four groups on better schools (11.9%), fireplaces (24.6%), and recreational facilities (32.1%).

The Doublers responses were in similar ranges to the Loners responses with some key differences. Doublers put more emphasis than Loners on a larger unit, recreational facilities, cheaper prices/rent, and having a fireplace. They show similar emphasis on balconies/patios, self-cleaning ovens, frost-free refrigerators, and being closer to employment. They show less interest in being closer to shopping.

Groupers showed wide fluctuations from the other groups in several key areas. They were by far the least concerned about having a larger unit, most likely because so many of them are currently in a single-family home. They placed the highest importance of any group on cheaper prices/rents, a microwave, a fireplace, ceiling fans, vaulted ceilings, and a smaller unit. These preferences appear to indicate that they will be most impressed by the "upscale amenities" but that they also do not want to overpay for them.

Conclusions

Single apartment shoppers are a diverse group and make their housing decisions based on a wide group of variables. Like married shoppers (see "Married With Children" *Apartment Resources*, April 1992), they tend to favor certain amenities and have certain distinguishing characteristics based on the type of household in which they have currently live. Knowing those tendencies makes it easier to market and design units to attract the type of tenants you desire, or to understand why you have the tenants you do based on your current marketing and amenities.

How Important are the Following Amenities Percent Responding "Very Important"				
Amenity	Loners	Doublers	Groupers	Parents
Washer/Dryer Hookup	82.8%	89.4%	86.5%	91.2%
Plush Carpeting	77.6%	84.8%	84.6%	77.2%
Larger Unit	62.7%	67.7%	38.5%	77.2%
Storm Doors/ Windows	75.4%	65.7%	71.2%	64.9%
Balcony/Patio	70.1%	69.7%	59.6%	64.9%
Cheaper Prices	47.0%	50.5%	71.2%	64.9%
Project Landscaping	61.2%	61.6%	57.7%	63.2%
Self-cleaning Oven	50.7%	49.5%	50.0%	61.4%
Frost-free Refrigerator	60.4%	60.5%	51.9%	59.6%
Better School District	11.9%	13.1%	25.0%	59.6%
Closer to Employment	51.5%	49.5%	50.0%	57.9%
Recreational Facilities	32.1%	41.4%	44.2%	42.1%
Garage	44.0%	35.4%	32.7%	40.4%
Swimming Pool	46.3%	44.2%	46.2%	38.6%
Closer to Shopping	33.6%	26.3%	21.2%	38.6%
Microwave	23.9%	21.2%	48.1%	36.8%
Fireplace	24.6%	33.3%	36.5%	28.1%
All First-floor Units	31.3%	26.3%	21.2%	24.6%
Ceiling Fans	23.1%	22.2%	30.8%	19.3%
Vaulted Ceilings	13.4%	11.1%	17.3%	10.5%
Smaller Units	4.5%	3.7%	9.6%	5.3%