



NATIONAL STUDENT
HOUSING SURVEY

Shifting Foundations

Lessons from a Decade of Data
on Student Housing

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HOUSING SURVEY



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1. Key Findings

- The student accommodation experience matters hugely - if a student has a bad experience in their accommodation, this is likely to impact negatively on the overall university experience. Consequently, this could reflect badly on perceptions of the institution as a whole, regardless of the type of accommodation they are living in. Conversely, students who report a positive accommodation experience are more likely to be satisfied with their overall university experience.

80% of students report their accommodation had an impact on their overall sense of wellbeing

- The living environment is of critical importance to student wellbeing and the findings are staggering. 80% of students report that their accommodation had an impact on their overall sense of wellbeing. 84% of those unhappy with their accommodation say it has negatively impacted on their overall sense of wellbeing. Accommodation and the living environment should be considered a vital part of any student strategy, particularly in relation to student wellbeing.
- We have witnessed how macroenvironmental changes impact on student perceptions and expectations/attitudes. Higher fees as

a result of the introduction of the new tuition fee regime in England in 2012 have led to higher expectations from students, which extends to their accommodation.

- There are indications of a maturing student accommodation market, with gaps between student expectations and actual accommodation provision closing. Students are more discerning customers and advances in technology have meant higher expectation around facilities and standards.
- Students expect more from their living environment than just the physical accommodation. Satisfaction is driven by condition, quality and value for money, but also management and relationships with others.
- Despite paying higher levels of rent, students in private halls are generally more satisfied than students in university halls.
- Data from the National Student Housing Survey (NSHS) reveals that minimising conflict in accommodation is more valuable than providing a vibrant student culture. Students are less concerned with socialising than ever before, and are instead seeking greater privacy. This is increasingly likely to present a challenge for providers, who will need to meet student expectations around privacy while ensuring that student wellbeing is not negatively impacted.

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- Accommodation plays a key role in supporting student recruitment and retention. It is an increasingly important part of the decision about where to study, and a vital component of the experience once students arrive. Accommodation is more important in the choice about where to study than extracurricular facilities and the geographical location of the university.

Failing to get first choice accommodation makes a student nearly three times as likely to feel negatively about their accommodation experience

- While overall, 41% of all students strongly agree that they are satisfied with the university experience, students who are unhappy with their accommodation are ten times more likely to feel negatively about their whole university experience (whether in private accommodation or not)
- The student accommodation experience starts at the very beginning. Getting your first-choice accommodation has a huge influence on the student accommodation experience, and subsequently is linked to a better perception of the overall university experience. Failing to get first choice accommodation makes a student nearly three times as likely to feel negatively about their accommodation experience.
- Value for money is more of a concern than price specifically. There is an appetite for better service provision: students are more willing to trade up and pay more for facilities than trade down. Balancing the needs of discerning students at the same time as responding to concerns about affordability of student accommodation poses a major challenge for the future.



2. Introduction

For the majority of students starting university, the transition to university life is a big one. Adapting to a new way of life and learning to live independently, often for the first time, means that where a student lives becomes a critical part of their experience.

While it may not be right at the forefront of students' minds when they first start thinking about higher education, we have seen accommodation play an increasingly important role in where they decide to study and how they feel about their university experience once they arrive. It matters, hugely.

The National Student Housing Survey (NSHS), conducted by Red Brick Research, was started over 10 years ago as a means for universities and student accommodation providers to get a better understanding of how their accommodation is performing, by measuring not just their performance, but how they fare against their competitors and the sector as a whole.

Consequently, the NSHS has also provided the motivation to drive up standards of student accommodation by increasing visibility and creating a platform for providers to share and be recognised for best practice. Over the last 12 years, the survey has grown and developed along with the sector to cover not just the physical aspects of accommodation, but the whole experience: from moving in, through to

the social interaction and support that students receive. It was also one of the first surveys to focus on the link between accommodation and student wellbeing, highlighting the real impact that accommodation can have on the student experience as a whole.

Results from the NSHS reveal that a negative accommodation experience impacts on a student's overall satisfaction, as well as the likelihood of a student recommending their university to others. A university will feel the effects of a bad accommodation experience, regardless of who provides it. It is more important than ever that universities seek to have a reliable understanding of how their students feel, not just across their entire accommodation portfolio, but benchmarked against others in the industry.

8/10 students taking part in the NSHS 2018 said their accommodation has had a direct impact on their wellbeing

Accommodation also plays a major role in student wellbeing - 8/10 students taking part in the NSHS 2018 said that their accommodation has had a direct impact on their wellbeing, while 84% of those unhappy with their

accommodation say it has negatively impacted on their overall wellbeing. We are hearing more and more about how universities and higher education (HE) institutions can be proactive rather than reactive in their approach to the wellbeing of their students.¹

Understanding the best ways to provide a better living environment which facilitates a better student experience is one way to do this. The findings from the NSHS reinforce the importance of the living environment on the overall university experience and subsequently wellbeing. It must be considered a vital part of any student strategy, regardless of who manages or operates it; if accommodation is not a core component of a university's student wellbeing strategy, it should be.

As students focus more than ever on their overall experience, offering a high-quality accommodation experience is vital to ensuring student satisfaction and providing a key differentiating factor for both the international and domestic markets.

The NSHS had over 35,000 students from 130 different countries and more than 70 universities and private hall providers taking part in 2018. With responses from over 222,000 students since its inception, data from the NSHS provides rich insight into what students expect from their accommodation

experience, and where changes need to be made.

This report draws on over 10 years of data and trends from the NSHS to examine the lessons we have learned about how student expectations of accommodation have changed, what best practice looks like, and how accommodation impacts on the student experience.



3. Then & Now - The Student Accommodation Journey Over the Last Decade

Over the last 10 years, results from over a decade of data from the NSHS alongside our wealth of research for the HE sector, have shown how macro-environmental changes have impacted on what students want to get out of their university experience, and how they make the decision about where to go. In turn, these changes have meant that the needs of students have altered.

Expectations have grown, which has changed how students live, study and socialise. As student needs and the accommodation market have changed and matured, so too has the NSHS, in order to support accommodation providers in improving standards and finding solutions to emerging issues.

In the early years of the NSHS, in line with the focus of the sector at that time, there was an emphasis on understanding student awareness of various student housing initiatives such as accreditation and deposit schemes more broadly. Back in 2008, accommodation choice was driven primarily by rental price and property condition. While the safety of the area, and good transport links featured highly on student 'wish lists', these were superseded by the range and quality of local amenities in the final decision.

In this period, satisfaction levels were generally 'OK' to 'Good' across the board, but students were not satisfied with things such as the timeliness of repairs and noise levels. Issues that

were the focus of students during this period were fairly rudimentary, indicative of a less-mature market at that time. That said, despite improvements, noise levels are consistently one of the most common complaints for students in purpose-built accommodation, particularly as we see a trend more focused on study rather than socialising.

In 2013, private halls began to overtake universities in terms of overall student satisfaction

In 2010, the NSHS carried out a more fine-grained analysis of the performance across different accommodation types (university halls, private halls and private accommodation). At that time, students in university halls reported fractionally higher overall levels of satisfaction than students in private halls in spite of the fact that 12% of students in university halls shared a room. In 2013, private halls began to overtake universities in terms of overall student satisfaction with accommodation, and since then this gap has continued to widen.

One of the reasons for this may be the fact that private halls are more likely to provide sought-after features such as en-suite bathrooms and studio apartments, facilities that are highly

valued by students. However, it is also because they do the basics well - they outperform on many aspects including core measures that we know drive satisfaction. For example, the condition and quality of accommodation and overall management of private halls is perceived to be better and subsequently private accommodation is seen to be better value for money.

In 2012 we witnessed an important step change in how students make the decision about where they go to university, where the reputation of not just the university, but the course became significantly more influential (Figure 3 - Page 17). Further to this, we saw the importance of accommodation rise to be seen on a par with 'the type' of university, while the location of the university slipped lower down the priority list.

2012 also saw dramatic changes in the higher education sector, and the NSHS was the first to report on the experiences of students dubbed the 'nine grand generation' - those who entered higher education under the new tuition fee regime. The NSHS provided evidence of a change in attitudes, behaviours and expectations amongst the 2012/13 intake, and at the time we forecast that this may have a large influence on the nature and character of student accommodation, and student life more broadly in the future.

Indeed, the new tuition fee regime appears to have had a profound impact - particularly in terms of student satisfaction. In the intake following the introduction of the new fee regime, overall student satisfaction levels for students living in private and university halls dropped, (Figure 1 - Page 10) suggesting that along with higher fees come higher expectations.

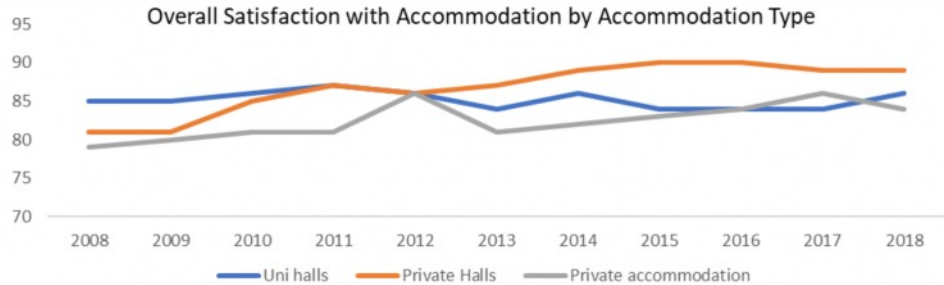
The impact of this macro-environmental change is still felt today, with higher expectations from students continuing. While overall satisfaction levels have since recovered, this has been primarily driven by an increase in satisfaction levels of students in private halls post-2012 rather than an overall increase across accommodation types.²



Today, students living in private halls are more satisfied than they were at the time of the tuition fee increase, in spite of generally paying more than their university hall counterparts, while satisfaction levels of students living in university halls are slowly climbing back

to the level they were at before the increase in tuition fees. It is fair to say that universities have felt the brunt of the fee regime changes when it comes to student accommodation perceptions, and are likely to be the ones who feel the effects of any future changes.

Figure 1
Overall Satisfaction with Accommodation by Accommodation Type 2008-2018



In 2013, NSHS data revealed the beginning of what has since become a trend in changes in attitudes towards the social aspect of accommodation, potentially also in response to the tuition fee hike. The number of students reporting a 'strong sense of community where they live' and that they enjoyed socialising in their accommodation began to drop. Aside from a brief positive 'spike' in these figures in 2015, which appears to have been as a result of an increased focus on social cohesion by accommodation providers, this trend has continued. In recent years, fewer students than before are stating that a 'vibrant social life' is an important factor when deciding where to live, suggesting that students may be

more focused on studying and just not that interested in socialising.

The growing importance of technology for students and evidence that accommodation providers were responding to these needs became obvious in 2015. While in 2013, only around a third of students said that WiFi internet access was included in

their rent, by 2015 this figure had jumped to around 90% highlighting the move to "must-have" feature rather than simply an "add-on".

NSHS data from 2016 onwards highlights the growing maturity of the student accommodation sector. Prior to 2016, large numbers of students reported that aspects of their accommodation were significantly better than they had expected, whereas in 2016, we saw a significant drop in this figure. While at first glance, this may seem to be a negative thing, in-depth analysis of the data suggests otherwise. Students over the past two years have still reported high levels of satisfaction,

but they are less 'pleasantly surprised', indicating that the gap between expectations and actual accommodation provision is closing, and that the market is maturing.

In 2018, we have seen vast improvements and investment in the quality of student accommodation compared to ten years ago. A lot of purpose built accommodation now offers a variety of facilities, including 24 hour security, a concierge, learning and social spaces, cleaning, entertainment and recreation facilities. While the standard and range of facilities has improved, rents have soared (above inflation) and there is a question about the impact that living costs are having on students. In 2008, NSHS data revealed the average rent paid by students in halls was £91 per week, while in 2018 the average rent was £132 per week.

While increasing rents may be helping providers to deliver a better student experience, there is increasing concern around the affordability of this experience for a significant number of students, plus the potential risk of segregation, or worse, 'pricing out' of some students from the whole experience. At the same time, while students are still sensitive to price, there is a willingness among some students to invest in particular features and experience - an indication of the increasing importance of

accommodation for students as the lines between living and learning spaces blur.

The past few years have seen a growing concern around student wellbeing. In recognition of this, we included a question in the NSHS asking students about the impact of accommodation on their wellbeing in 2018. Early responses to this new question confirm the important link between accommodation, wellbeing and the broader student experience. This move to focus on wellbeing is indicative of the types of issues that are likely to be under the spotlight in the next few years.

Price, features and market supply are in better balance with student needs

The NSHS has highlighted that price, features and market supply are in better balance with student needs than ever before. As we move into the second decade of the NSHS, responding to the needs of discerning students alongside concerns around affordability, and managing issues such as balancing the desire for increased privacy while ensuring that students are not isolated, are just some of the challenges that the NSHS suggests lie in store for accommodation providers over the next decade.

4. Predicting and recording social change and priorities

Some of the starkest trends NSHS data has highlighted over the past ten years have been in the areas of social change and student priorities. So, what are some of the key changes in preferences and priorities that we have seen?

Advances in tech mean students are more discerning than ten years ago

One of the key shifts we have seen over the last ten years is an increase in what students expect and want from their accommodation.

In the past, student accommodation was simply a place to sleep and study. Today, students are investing more than ever in their education, and so their expectations regarding return on investment extend to their accommodation experience.

While most students are satisfied with their accommodation, the NSHS data indicates that today's students are more discerning customers. We will go into more detail in chapter 5 about what it is specifically that students look for, but it is important to note that changes in expectations are aligned with a heightened awareness of what is available, possible and with what students are used to at home.

With huge leaps forward in technology over the last 10 years, facilities in their own homes have become more advanced and students are using these experiences to guide their expectations

of what they want from their student accommodation. Accommodation providers have had to adapt to this quickly as students have higher expectations around the types of facilities they want from their accommodation and are often willing to pay more for these. Laundry, kitchen facilities and internet are the facilities that students are most likely to trade up. Students are also increasingly looking beyond just the physical aspects of accommodation.

A stronger focus on the overall accommodation experience

Students want high quality, modern accommodation, this hasn't changed. However, detailed analysis in 2017 revealed the key drivers of overall satisfaction with accommodation:

1. Condition and quality of accommodation
2. Overall management
3. Value for money
4. Relationships with others in accommodation
5. Design and visual appeal of bedroom

These are indicative of a shift in focus towards the overall 'experience' they receive in their accommodation as well as the physical features. Getting the basics right is essential, but increasingly students are looking for accommodation that is well managed, has minimal issues, and where the staff are friendly

and supportive. We also see relationships in accommodation as an influential factor. It is important to state that while students are happiest when they get on really well with the others in their accommodation, the main issues come when there is conflict between flatmates. This is what causes unhappiness, not just in terms of their accommodation experience, but the whole university experience. 92% of those who get on really well with their flatmates agree that they are satisfied with their overall university experience, compared to 62% of those who don't get on at all with their flatmates.

Greater desire for privacy

Privacy is more important to students today than it was ten years ago. An example of this is the growing number of students who prioritise an en-suite bathroom when searching for somewhere to live.

Today, availability of an en-suite bathroom is more important than ever, with this appearing as one of the 'Top 5' important factors in deciding where to live. (Figure 4) En-suite availability is also a key contributor to satisfaction, with students who have an en-suite more likely to be 'very satisfied overall' with their accommodation. This may in part explain the widening gap between university and private halls in terms of overall student satisfaction as most students in private halls have access to an en-suite bathroom.

We have also seen a larger number prioritising 'bedroom space' in their top search criteria, suggesting a shift away from wanting social space and more focus on their personal / learning environment.

There is further evidence that students feel that studio flats offer the best value for money. However, the experience of staying in this type of room can be isolating. Residents of studio flats are less likely to feel that there is a strong sense of community, or that they have good relationships with other students in their accommodation.

Less focus on the social experience

Possibly linked to the privacy trend students have been less likely in the past five years to report that there is a strong sense of community in their accommodation.

In 2018, just 41% of students believed there was 'a strong sense of community' where they live. Students in university halls are more likely to report a strong sense of community than those living in private halls; however, this number is still lower today (43%) than it was in 2011 (50%). (Figure 2)

Additionally, one in ten students said they actively disliked socialising in their accommodation. Higher education providers will rightly be asking themselves: what can be done to reverse this trend? However, most

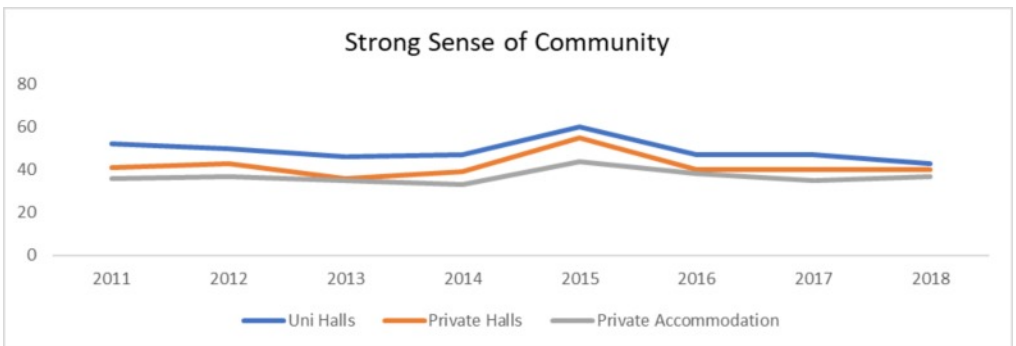
recent NSHS results indicate that students are not disturbed by this trend at all, and that minimising conflict is actually more of a priority. In 2015, 21% of students told us that 'Opportunities / access to a vibrant social life' was an important factor when choosing accommodation. By 2017, this figure had dropped to just 14%, and in 2018 stands even lower at 10%. Furthermore in 2018, 18% of students told us they would sacrifice social events organised by the accommodation team in return for decreased rent. Along with catering, this was the thing they were most likely to want to sacrifice.

These figures suggest that there is a growing trend whereby for most students, studying hard is now far more important than an active social life at university.

Is this a result of increased pressure due to a bigger financial investment into education, along with anxiety around graduating into an increasingly competitive job market? Or is it also reflective of a change in preferences across generations as Generation Z start to move through the ranks at university?

We know that Generation Z are not anti-social, but rather, a lot of their socialising and collaboration occurs in an online space, and so this may be indicative of the preferences of this new generation of students.³ Careful monitoring of these social trends along with measures of wellbeing will be increasingly important so that appropriate support can be provided.

Figure 2
'Sense of Community' across
accommodation types 2011-2018



5. Living Environment has a Significant Impact on Student Wellbeing

Over the last ten years we have seen a growing understanding of the critical importance of living environment to wellbeing. Research has highlighted that positive accommodation circumstances are linked to better wellbeing and mental health and a more positive student experience.

We also know that students who experience negative accommodation circumstances display higher levels of depression⁴, and that housing difficulties such as noise, inability to sleep and conflict with other students are known triggers of mental distress.⁵

In addition, well-designed accommodation features such as shared spaces for socialising and dining, and the pastoral care role played by accommodation teams, can support student wellbeing by helping to develop a sense of community and reducing student isolation.⁶

84% of those unhappy with their accommodation say it negatively impacted their overall wellbeing

In 2018, 8/10 students said that their accommodation has had a direct impact on their wellbeing, and 84% of those unhappy with their accommodation say it has negatively impacted on their overall wellbeing.

Further evidencing this link is the fact that 91% of students considered to be 'promoters' of their accommodation⁷ reported that their accommodation had a positive impact on their wellbeing.

91% of students considered to be 'promoters' say their accommodation had a positive impact on their wellbeing.

In recent years, as the link between accommodation and wellbeing has become better understood, we have seen accommodation providers increasingly focussed on managing issues such as noise and recognising the importance of communal and kitchen spaces in new building fit-outs and renovations. These efforts are clearly working - during the same period we have seen slight decreases in the numbers of students who report that they are troubled by noise and increasing numbers of students who report that they feel their neighbours respect their right to quiet.

A key emerging issue is that, at the same time as providers have focussed more on communal and kitchen spaces, fewer students are reporting they have

formed close relationships with other students in their accommodation.

Just 60% of students in 2018 told us they had formed close relationships with other students in their accommodation. EU students and non-EU students are less likely to form close relationships (51% and 55%) than students from the UK (63%).

This is a significant trend given the importance of relationships with others to overall student satisfaction; and evidence that suggests that a feeling of belonging is linked to a more positive university experience and higher student retention.⁸

With strong evidence linking loneliness and isolation to poor physical health and illness,⁹ this risk is likely to require ongoing careful management and monitoring. This is particularly important for international students for whom loneliness is a key risk factor for increased mental distress. Strong social networks are a known protective factor.¹⁰

The challenge for accommodation providers will be to maintain a balance between delivering the privacy and security that students desire, whilst also facilitating opportunities for social interaction and building a sense of community, and selling the benefits of the social experience.



6. Accommodation plays a key role in supporting student recruitment and retention

Accommodation may not be the first thing that students think about when they are deciding where to study, however, it plays an increasing role in the decision-making process and in shaping the university experience.

While for the majority of students, the course they study has been far and away the most influential factor in the decision about where to go to university, we have started to see a very slight downward trend in its importance over the last 7 years.

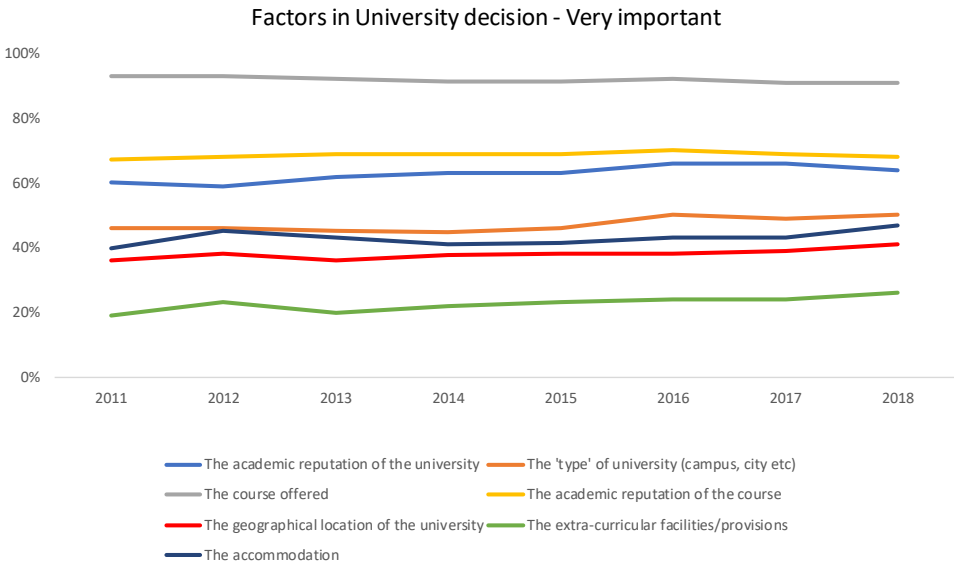
Although course offering remains the most dominant factor in the decision of where to study, and this doesn't look set to change, the importance of

accommodation as a factor in the decision-making process is growing. In Spring 2018, 91% of students stated that accommodation was important in their decision, and nearly half (47%) of all students stated it was 'very important' compared to 40% of students in 2011. (Figure 3)

Students studying in the UK place higher importance on accommodation in their decision of where to study than they do the geographical location of the university (41%) or extracurricular facilities (26%).

This is particularly true for non-EU students, who place more importance on accommodation when choosing their university than other student groups.

Figure 3
Importance of factors in the decision of where to study 2011-2018



Ultimately, this means that you could have the best extracurricular facilities and be situated in an ideal location, but if your accommodation isn't up to scratch, a student may choose to go elsewhere.

Positive accommodation circumstances also play a role in student retention and the academic performance of students. We know that students who feel that they have adequate services and feel well integrated in their accommodation are less likely to report that they are considering dropping out of university.¹¹

The moving in experience plays a key role in this area - students who feel welcomed by other staff and students are less likely to consider dropping out.

Table 1
Net Promoter Score (NPS) against Satisfaction with the Overall University Experience

	On a scale from 0-10 How likely are you to recommend your accommodation			
	Total	Detractors (0-6)	Passive (7-8)	Promoters (9-10)
Sample Size	31968	10024	12028	9916
I am satisfied with my overall university experience'				
Strongly agree	41%	24%	38%	62%
Tend to agree	47%	53%	53%	33%
Neither agree or disagree	7%	13%	6%	3%
Tend to disagree	4%	8%	3%	2%
Strongly disagree	1%	2%	1%	0%

NSHS data reveals that international students are less likely to feel welcomed by staff and other students when moving in, highlighting the need to focus on improving and monitoring performance in this area to support efforts to improve student retention.

The data also highlights that a poor accommodation impacts on the wider university experience and increases negative word of mouth about an institution. While overall, 41% of all students strongly agree that they are satisfied with the university experience, students who are unhappy with their accommodation are ten times more likely to feel negatively about their whole university experience (whether in private accommodation or not).

Conversely, 62% of students who have a positive accommodation experience strongly agree that they are satisfied with their overall university experience as shown in Table 1:

Given the importance of accommodation to students when choosing their course and the increasing reliance of students on league tables, awards, rankings and reviews, providing a positive accommodation experience, that students are willing to talk about could be the difference between whether a student chooses a particular university or not.



7. What Students Want

A higher education institution that understands what students want from their living environment and the things that influence the accommodation experience has an advantage when it comes to recruiting new students. So what is it exactly that students want from their accommodation experience?

Failing to get first choice accommodation makes a student nearly three times as likely to feel negatively about their accommodation experience

Satisfaction with the student accommodation experience is impacted right from the beginning of the process. Failing to get their first choice accommodation makes a student nearly three times as likely to feel negatively about their accommodation experience. Crucially it also makes a student nearly twice as likely to be an NPS 'detractor' when talking about their overall accommodation (48% vs 28%).

Finally, not getting your first choice can also impact on wider perceptions of your whole university experience with the proportions of students strongly agreeing they are satisfied with their overall experience much higher among

those who got their first-choice accommodation. In an increasingly competitive market, especially as the period of demographic decline we have seen in the young UK population is predicted to change and start rising again in 2021¹², offering additional benefits to students such as providing enough of the types of accommodation students want and enabling them the best chance to secure their first-choice accommodation, will be increasingly beneficial as part of any student recruitment strategy.

When students are deciding where to live, price is a key factor in the decision-making process, however, it is no longer the most important factor. Students are increasingly looking at the overall investment they are making in their accommodation and focussing more on value for money.

An example of this is the importance of condition and quality of accommodation, which has been the most important search criteria for students when looking for their accommodation for the past five years. While it remains the most important factor (Figure 4), the percentage of students who prioritise condition and quality has decreased slightly in the past three years. This is possibly a sign that overall accommodation standards have increased, and therefore it is less of a concern than it was previously.

Figure 4
Accommodation Selection Criteria 2018

(19%), kitchen facilities (19%), and internet (17%).

Top selection criteria when choosing accommodation (NSHS Spring 2018)



Although condition and quality of accommodation is improving, it continues to be one of the three biggest drivers for students when assessing value for money along with internet access, kitchen size and facilities. It is also something that students are willing to pay more for.

The NSHS asks students if there are any features they would 'trade up' or 'trade down' for increased / decreased rent. Of the students who would be willing to pay more for something, the top desired improvements were laundry facilities (21%), improvements in noise levels

The number of students willing to pay more for at least one feature (50%) is double that of those who want to keep everything in their accommodation the same (23%); students are nearly twice as likely to want to trade up features for a higher rent, than trade down for a lower rent.

The number of students willing to pay more for at least one feature (50%) is double that of those who want to keep everything in their accommodation the same (23%) and students are nearly twice as likely to want to trade up features for a higher rent, than trade down for a lower rent.

Students and their parents demand good value for money. Given the evidence that some students are willing to invest more in return for certain features in their accommodation, service levels and differentiations are increasingly likely to become more important in the next five years. While perceived value for money remains higher for 'budget' and 'luxury' accommodation, the perceived value for money is lower for mid-ranged accommodation.

This may mean that providers will have to develop their student offer, further considering marketing, price, positioning and differentiation.

NSHS Fact

For several years, international (non-EU) students have indicated higher levels of satisfaction with their accommodation than EU or domestic students.

Non-EU students are more likely to be satisfied with a wider range of aspects of their accommodation, such as kitchen facilities and the availability and quality of communal and social areas.

The reasons for this are not entirely clear. While this may be partly explained by the fact that non-EU students are more likely to be living in more expensive accommodation, their levels of satisfaction continue to be higher than UK and EU students who are paying the same price.

It is possible that cultural influences and experience of accommodation in their home countries mean that these students arrive with different expectations. Non-EU students are also more likely to secure their first choice of accommodation than EU or domestic students, and this is a key determinant of overall satisfaction.

Conclusion

This report has highlighted the changes and trends we have seen in the student accommodation sector over the past decade, and the impact of macro-environmental changes on students and the choices they make about their accommodation as well as what they expect and want.

Although the student accommodation market is maturing, significant challenges lie ahead for the sector. As physical accommodation offerings improve, there is likely to be an increased spotlight on social aspects of accommodation as well as student wellbeing.

It is clear that the differing preferences of a new generation of students will require accommodation providers to carefully monitor trends.

The insights we have gained from this analysis of the last decade of NSHS data will inform future iterations of the National Student Housing Survey.

We offer this analysis to the higher education sector to support the efforts of the sector in providing accommodation experiences that promote student wellbeing and an overall positive learning experience.

As the NSHS continues to grow not just in the UK, but globally, we look forward to continuing to work with our university and student accommodation partners by providing a visible platform for monitoring performance and sharing best practice.

How to get involved

Since 2007, more than 70 institutions have replaced their internal surveys with this nationally recognised benchmark.

To get involved in the NSHS head over to the NSHS website: **www.nshs.co.uk**.

There you will be able to find out more about the project and register your institution or organisation.

Once registered, we will then check your hall data - you will need to simply choose which question modules you want to ask your students. You will then be able to launch and get valuable student responses.

If you have any questions about participation or this report, please get in contact: info@nshs.co.uk

Notes

- ¹ Anthony Seldon & Alan Martin, *The Positive and Mindful University*, (Higher Education Policy Institute, 2017), Retrieved from <https://www.hepi.ac.uk/wp-content/uploads/2017/09/Hepi-The-Positive-and-Mindful-University-Paper-18-Embargoed-until-21st-Sept-1.pdf>
- ² The % of students who report being 'satisfied' or 'very satisfied' up to 2015, and the % of students who describe their accommodation as 'Very Good', 'Good' or 'OK' under a new measure from 2016
- ³ Sparks and Honey, *Meet Gen Z: Forget everything you learned about Millennials*, (2014) Retrieved from www.slideshare.net/sparksandhoney/generation-z-finaljune-17/
- ⁴ Nigar G Khawaja and Krystle Duncanson, "Using the University Student Depression Inventory to Investigate the Effect of Demographic Variables on Students' Depression", *Journal of Psychologists and Counsellors in Schools* 18, no. 2 (2008).
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- ⁶ *Student Minds, Student Living: Collaborating to Support Mental Health in University Accommodation*, (Student Minds, 2017), Retrieved from http://www.studentminds.org.uk/uploads/3/7/8/4/3784584/student_living_collaborating_to_support_mental_health_in_university_accommodation.pdf
- ⁷ The NSHS asks students how likely they are to recommend their accommodation on a standard 11-point Net Promoter (NPS) scale. Students are considered to be either Detractors (scoring 0-6), Passives (7-8) or Promoters (9-10).
- ⁸ Seldon and Martin, 2017, p 58.
- ⁹ Nicole K Valtorta et al., "Loneliness and Social Isolation as Risk Factors for Coronary Heart Disease and Stroke: Systematic Review and Meta-Analysis of Longitudinal Observational Studies", *Heart* 102, no. 13 (2016).
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