unipol

International Student Housing Survey

Briefing Paper

June 2024

Executive Summary

In 2023, Unipol conducted a study investigating the key issues experienced by international students in finding accommodation and in living in the UK. The study is based on results from 3,698 international students across 30 universities.

The results were analysed in detail in November 2023. However, following changes to postgraduate taught visa regulations for students with dependents in January 2024, the dataset was reinvestigated to consider implications for students not affected by the new rules.

This briefing paper highlights the findings for those student cohorts who will form the main sources of future recruitment for universities; undergraduates, postgraduates with no dependents and in a separate section, the much smaller group of postgraduate research students (PGR) students with families.

Current Context

In the context of a faltering international student supply since September 2023, recent political pressures to reduce international student numbers and a fall in real income per domestic student, many Higher Education Institutions (HEIs) will be facing financial uncertainty. A recent report **UK student recruitment numbers down, but is that the whole story?** by the Higher Education Policy Institute (HEPI) on 30th May 2024[i] , reported **'offers for PG study'** were down by 18% year on year (YoY), compared with the same time in 2023 (21 May), and '**offers accepted**' were down by 33.89% YoY. In particular, Post-92 institutions were highlighted as experiencing significant headwinds, being more exposed to the decline in Indian and Nigerian students. Offers accepted by PG Indian students are down 44% YoY, and 40% for Nigerian students.

In the backdrop of these declines, many institutions will seek to access the wider market of global students. In doing so it will be crucial to recognise the different views around accommodation of these different nationalities and ensure the relevant information is provided pre-arrival, as well as offering on-going support once students have taken up their place. In the competitive market place of international student recruitment it will become increasingly important for universities to understand their local housing market to be able to offer comprehensive advice on cost, types of accommodation available and the amenity levels on offer. As will be seen, knowledge of the University and Purpose Built Student Accommodation (PBSA) sectors tends to be better, however increasing numbers of students are needing to find accommodation in the wider Private Rental Sector, where advice HEI's currently offer is more limited.

In the policy implications section, this paper aims to set out a number of improvements and interventions that could be made to significantly improve the accommodation experience for international students and which should form part of any future recruitment strategy.

Key Findings

For 2,964 international students without dependents:

- 42% found it more difficult than expected to find somewhere to live, with 57% PGR students finding it so
- 31% cited affordability as the worst problem they experienced
- where students are living with the university or in private PBSA, overall experiences for international students are not positive, achieving an NPS score of -25
- NPS scores were only very positive for students whose accommodation was definitely value for money (+43) or strongly felt like home (+24)
- 73% of students had received accurate information on the housing market prior to arrival. Around 1 in 6 (17%) of students stated the information they received was inaccurate with 9% stating they had not received any information. So over a quarter of students had no or inaccurate information.
- 27% were worried, or very worried about their financial security. 39% of students from India were worried about their finances. Those living in houses were slightly more likely to worry about finances than those in university and private PSBA.

For 588 PGRs with families:

- PGR students with families are much less likely to have received accurate information with just 49% of respondents responding positively, as compared with 74% of students who arrived alone
- 79% of PGR students with families found it more difficult to find somewhere to live as compared with 57% for PGRs with no family
- The NPS score for PGR students with families is -19, significantly better than PGR students without dependents (-30). This may suggest that the amount of careful planning required to move a family to the UK has resulted in better outcomes than for those entering the housing market alone.

Students Without Dependents

Of the 3,689 respondents to the survey, 2,964 or 80% were without dependents. Overall students from 134 countries are included in this cohort, with respondents from India and China making up 41% of the total. Postgraduate Taught (PGT) students on 1-year programmes make up 41% of responses, undergraduate returners 28% and undergraduate first years 13%. The split between first years and returning students is 40:60.

Fig 1: Profile of Students without Dependents - Country of Origin (2,964 respondents)

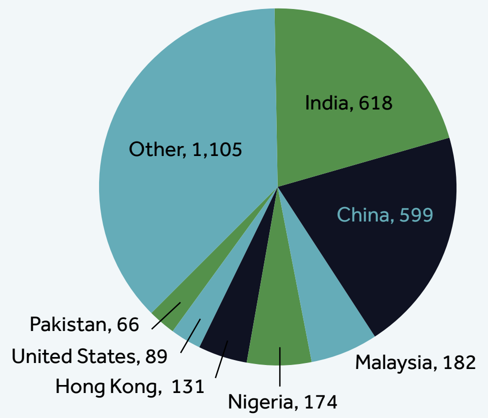
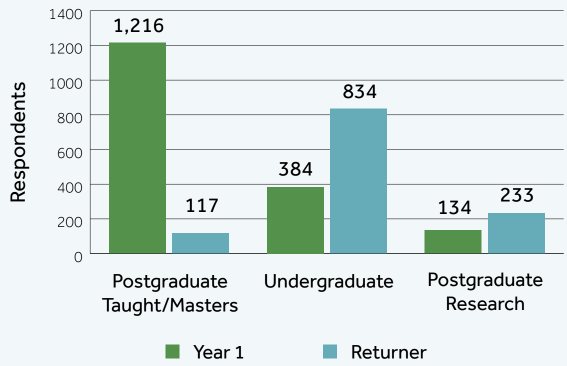
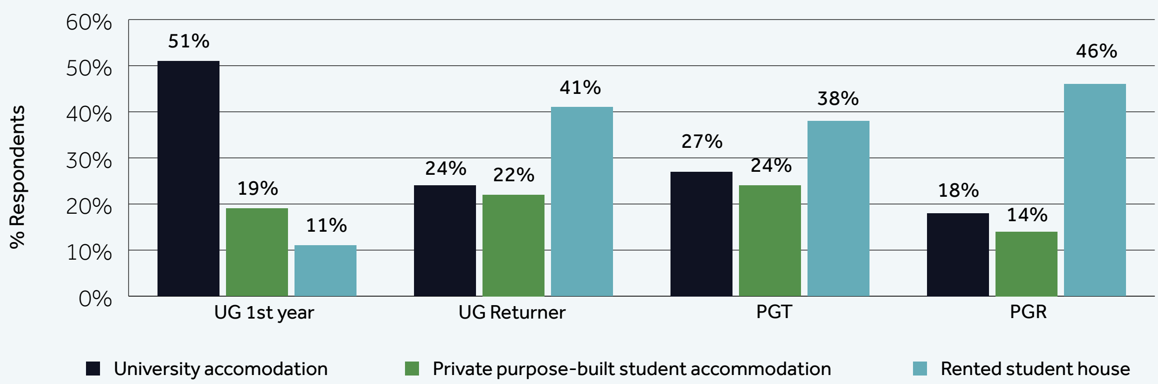


Fig 2: Cohorts: Level of Study, First Year marker, Main Course Types (2,918 UG & PG respondents)



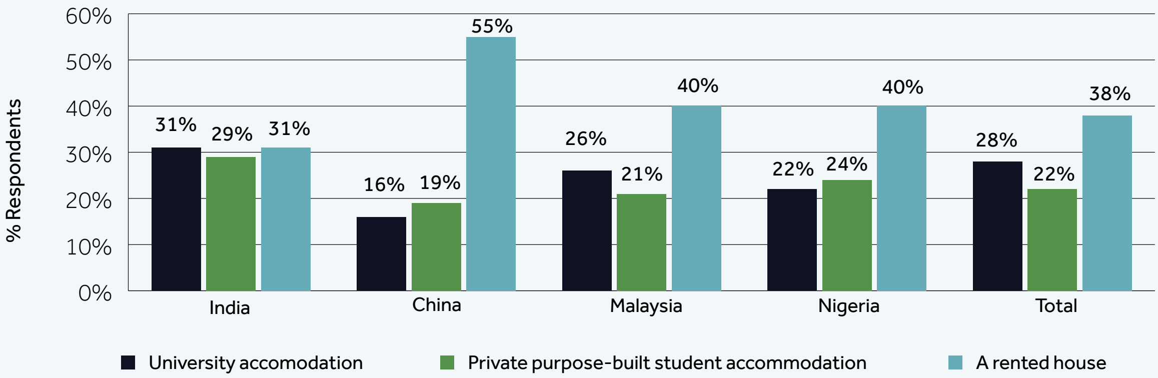
The main housing types by student cohort are shown in Fig 3 below. First year undergraduates are most likely to be housed in university accommodation, whilst returners in the shared rented housing market. The shared housing market plays the main role in housing PGT students and even more so for PGR students.

Fig 3: Respondents by Main Cohort Type, Main Housing Types (2,528 respondents)



The role of shared housing is also evident when looking at the main source countries (Fig 4), where 38% of international students and 55% of Chinese students are living. The high percentage of Chinese students living in shared housing was surprising, however respondents were asked quite specific questions about their housing type and the predominance for Chinese students with no dependents was "a rented student house".

Fig 4: Students by Housing Type - Top 4 Countries (1,404 students from main countries, 2,964 total)

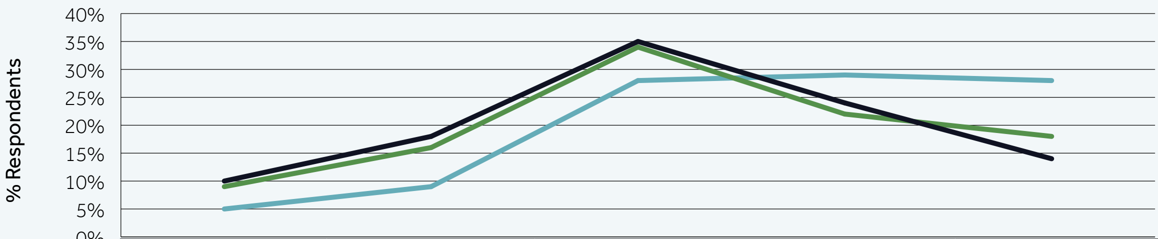


Ease of finding accommodation

Overall the experiences of students finding somewhere to live is very mixed, with 25% of respondents reporting it was easier to find somewhere to live than expected, 34% saying it was as expected, and 42% stating they found finding somewhere to live harder than expected as in Fig. 5. Analysing this further, there is no discernible difference between first year or returning students. However, there are some differences, most notably by level of study.

PGR students found it much harder than expected to find somewhere to live. This is not a surprise given their housing needs are quite different to the provision available through universities and their mature student status. They are also a much smaller cohort in the survey (367 PGR students) and in general in the university population.

Fig 5: Finding Somewhere to Live versus Expectations? Level of study (Base 2,904)

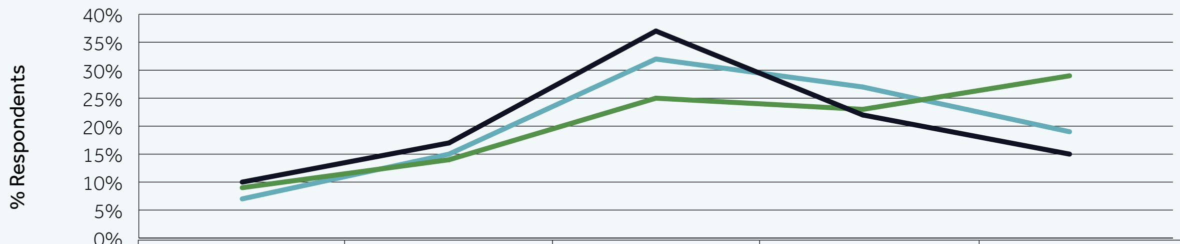


	Much easier than expected	Slightly easier than expected	As expected	Slightly more difficult than expected	Much more difficult than expected
UG	10%	18%	35%	24%	14%
PGT	9%	16%	34%	22%	18%
PGR	5%	9%	28%	29%	28%

There is also a difference in ease of finding somewhere to live by university type. Of respondents studying at Russell Group universities, 39% thought it was more difficult to find somewhere to live, as compared with other types of universities where 48% found it difficult.

Those students beginning their studies in January also have a more difficult time finding accommodation, as might be expected given the lack of accommodation options available through the University housing system at that time of year.

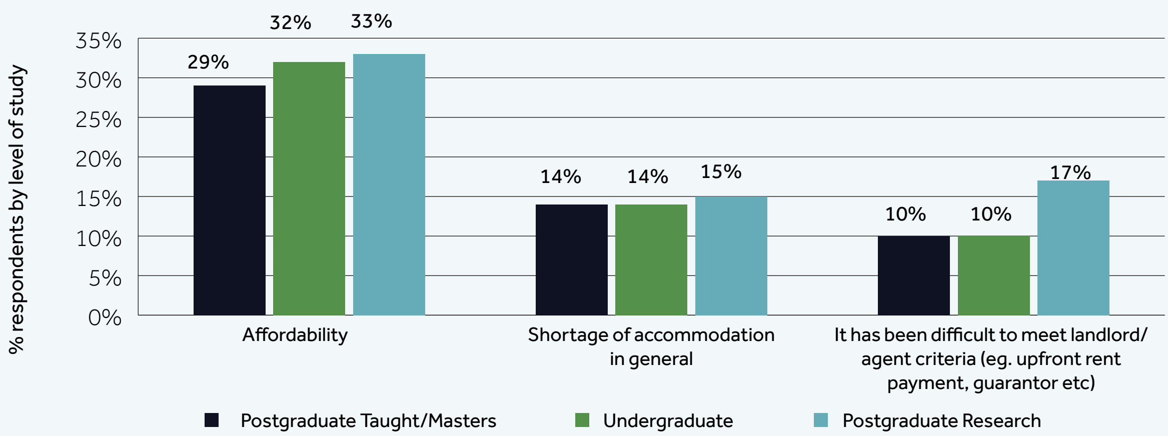
Fig 6: Finding Somewhere to Live versus Expectations? Programme Start Time (2,702 respondents shown)



	Much easier than expected	Slightly easier than expected	As expected	Slightly more difficult than expected	Much more difficult than expected
Sept	10%	17%	37%	22%	15%
Jan	9%	14%	34%	23%	29%
Before Jan 2022	7%	15%	32%	27%	19%

Within these results, three main problems are highlighted in the search for accommodation, with affordability being the most widespread problem. For PGR students, issues accessing the housing market are particularly evident.

Fig 7: Problems in finding somewhere to live (2,383 responses)



Open text responses for PGR students indicate an overall lack of information about what to expect from the UK/student housing market. This is information that should be available, but the commonality of issues being raised in the responses highlights that there is still work to be done to prepare international students for the realities of the housing market.

"There really are no explanations about how to find housing outside of school accommodation, especially if you are a mature student." US student, London

"For international students arrive here is arrive to black box, nobody know anything. We create a Facebook group for Chileans that come to study here to provide them with information, but is an independent group. Chileans has to pay 12 months rent to access private accommodation. That is outrageous. The University do not take responsability with people that comes with their families either, many times childrens. There are importants gaps of information on this matter." Chilean student, Manchester

"The fact that it is extremely competitive to find a proper place to live in a city." Japanese student, Manchester

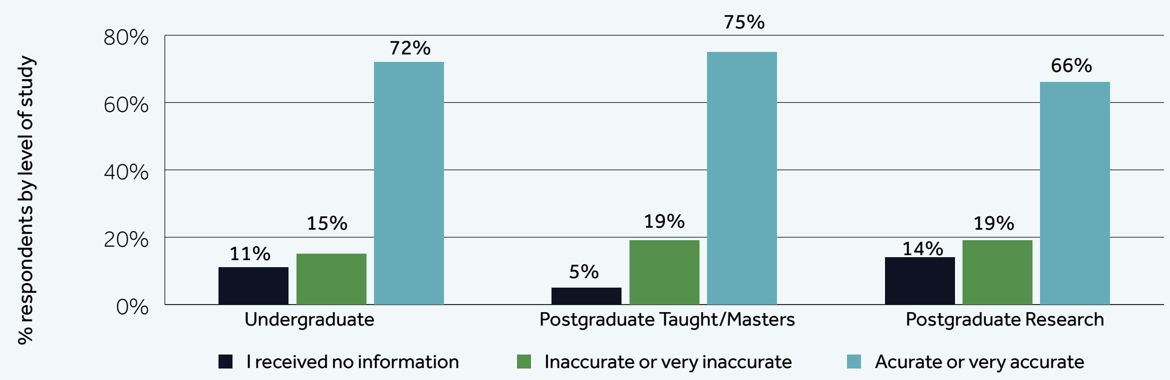
Accuracy of Accommodation Information

International students are making decisions at distance and therefore the accuracy of the information they are given during the search for accommodation is critical. Fortunately, 73% of respondents (2,156 students) stated that the information they had received on how to find accommodation, and the availability of properties, was accurate or very accurate. These students were most likely to have found their current (PBSA style) property through the university or a private student accommodation provider.

Of more concern are the 17% of respondents, or 513 of 2,964 students who said the information they received during the search for accommodation was either inaccurate or very inaccurate. 19 % of PGRs and PGTs respondents respectively stated that information given to them was either inaccurate or very inaccurate, compared to 15% of undergraduates. 23 % of respondents from non-Russell Group universities stated that the information they had received was inaccurate or very inaccurate, as compared to only 16% of students at Russell Group universities.

A further 262 respondents or 9% of respondents stated that they had received no information at all during the process of finding somewhere to live. The cohorts stating most that they had experienced this lack of information were PGR students (14%, 52 respondents) and, surprisingly, undergraduates (11%, 139 respondents), with only 5% of PGT student expressing this concern. Of these respondents who had no prior information, 64 had found their property through an estate/letting agents' website, a private student accommodation website (22) or through friends (19) or the University website (18).

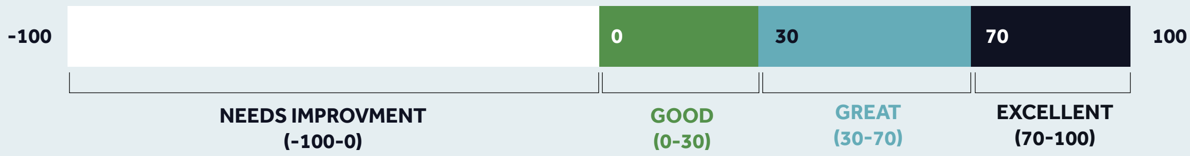
Fig 8: Before you arrived in the UK, how accurate was the information you received on how to find accommodation and the availability of properties? (2,901 respondents)



Satisfaction with Living Arrangements

Overall international students in this survey score their accommodation -25 on the NPS Scale of -100 to 100. This means they feel that the experience needs significant improvement.

What is a good NPS score?



By comparison, NPS scores for individual PBSA operators are published selectively, including iQ Student Living[ii] which achieve an NPS of +40 across is 31,000 bed portfolio in 2021/22, and Fresh student Living[iii] whose NPS in 2023 was +34. No published benchmarks have been found for international student experiences, nor for students accessing the housing market, which means no direct conclusions can be drawn. That said, a score of -25 indicates a cohort whose housing experiences have not been positive.

Fig 9: NPS Scores by Cohort

	Undergraduate	Postgraduate Taught/Masters	Postgraduate Research
Responses	1,139	1,340	366
NPS	-28	-21	-30

Marginal differences in NPS scores can be observed between students by level of study. PGT students are most positive at -21 and arguably the best served by universities, then a small gap to undergraduates at -28 and PGR students at -30. There is no difference in score between Russell Group or other types of university.

NPS scores drop the longer the commute, with those with a commute of more than 30 minutes scoring -44 and lower as distances grow (but sample is also smaller).

NPS scores would appear to be positively influenced by specific areas of satisfaction:

- Respondents state their accommodation is **definitely** value for money (NPS +43)
- Respondents **strongly agree** their property "feels like home" (NPS +24)
- Respondents state their accommodation is **definitely** affordable (NPS +7).

There is large variance by country in the NPS scores, with the lowest NPS scores of -39 from Hong Kong, the Unites States -38 and Nigeria -26.

Fig 10: NPS Scores by main country

Main Country	India	China	Malaysia	Nigeria	Hong Kong	United States
Responses	614	587	180	170	127	87
NPS	-17	-29	-19	-26	-39	-38

Looking at the NPS scores by city reveals that students in the Nottingham and Manchester markets were least likely to recommend their experience to others, each achieving an NPS score of -28, worse than the average score across all markets. Sheffield is more like the average, and Leeds is slightly more favourable at -21, and Bradford the best of all at -2. However the sample size is much smaller and no conclusions should be drawn.

Fig 11: NPS Scores by City

City	Leeds	Nottingham	Bradford	Manchester	Sheffield	ALL Cities
Responses	748	790	85	474	375	2,919
NPS	-21	-28	-2	-28	-24	-25

Opinions on Where Students are Living

The majority of respondents (70% or 2,067) are living relatively close to their universities and not commuting. Only 354 students (12%) reported living more than 30 minutes from their university, and 280 of these lived within a one-hour commute of university.

Respondents were also separately asked why they chose to live further away from the university. The main reasons were to find cheaper rents (403 responses, 14%) and as no properties were available (385 responses, 13%).

The impact of the commute is mixed, with around one third of commuters (255 respondents) experiencing no impact on their being part of the university student community in general, 46% of commuters stating the commute has a positive impact on their being in the student community, whilst 23% stated the commute was a negative in this respect.

Sharing a Room and Overcrowding

213 (7%) of respondents stated that they shared a room. Students living in PBSA from universities or the private sector were not asked this question, and so those living in twin accommodation in those settings are not picked up by the questionnaire. These 213 respondents are predominantly living in rented houses with just 43 staying in a shared room with families or friends.

When asked if the property was overcrowded, 23% of respondents agreed or strongly agreed that it was. On investigating which types of properties were most likely to be overcrowded a similar proportion of students (24%) state that university and private PSBA is overcrowded, similar to the proportions in rented houses (25%). This leads to the conclusion that the language used in this question has not been effective in rooting out any particular problems of overcrowding, and perhaps a perception of dense population rather than any wrongdoing has been captured by the survey.

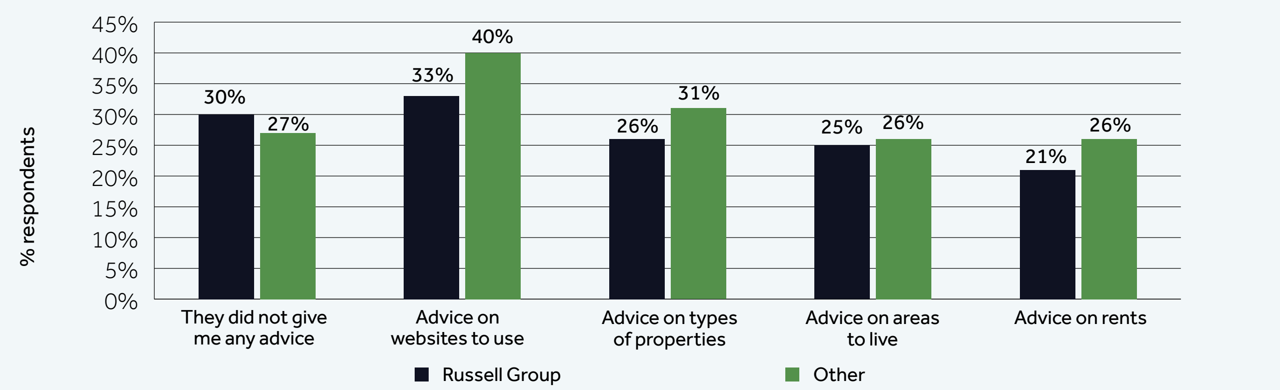
Perceptions of having enough space reveal marginal differences between property types. Those most likely to feel space poor were only 179 or 17% of respondents, with 22% of those in rented housing feeling confined, 18% in university accommodation and only 14% in private PBSA.

Again, the responses to whether there are more people living in the property than expected reveal that this is most regularly the case in private PBSA with 30% of respondents agreeing compared to the overall 25%. It is probable that the language in this area of the questionnaire is again picking up general perceptions of density of population rather than overcrowding issues.

University Advice on Non-University Property

Universities still have a way to go in advising students who do not wish – or are not able to – live in university owned or managed accommodation. The levels of advice given to who wanted non-university accommodation varied between university types, with non-Russell group universities most likely to provide some information.

Fig 12: What level of information or support did your university give you about non-university provided accommodation? (Base 2,136 students, 1,672 Russell Group, 464 non-Russell Group)



Respondents were most likely to be referred to other websites. There were only marginal differences in proportions of respondents by level of study, but PGR students were least likely to have been helped (36% not advised vs 29% overall).

Value for Money

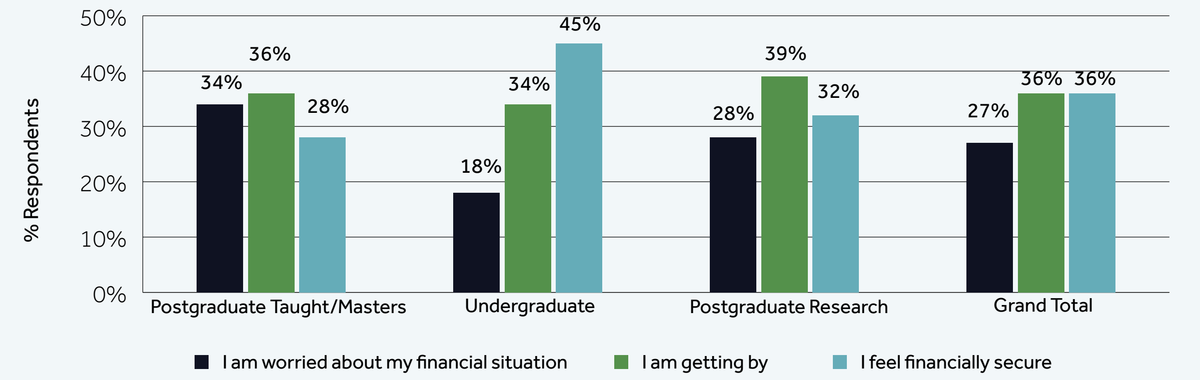
Overall, 63% of respondents stated that their accommodation represents value for money.

Compared to this 63% average, university accommodation was rated as value for money by 61% of respondents, private PBSA 65% and shared rented houses 62%. The small number of respondents who are living with friends and family rated value for money much higher (as might be expected), at 70% and 84% respectively.

Financial Security

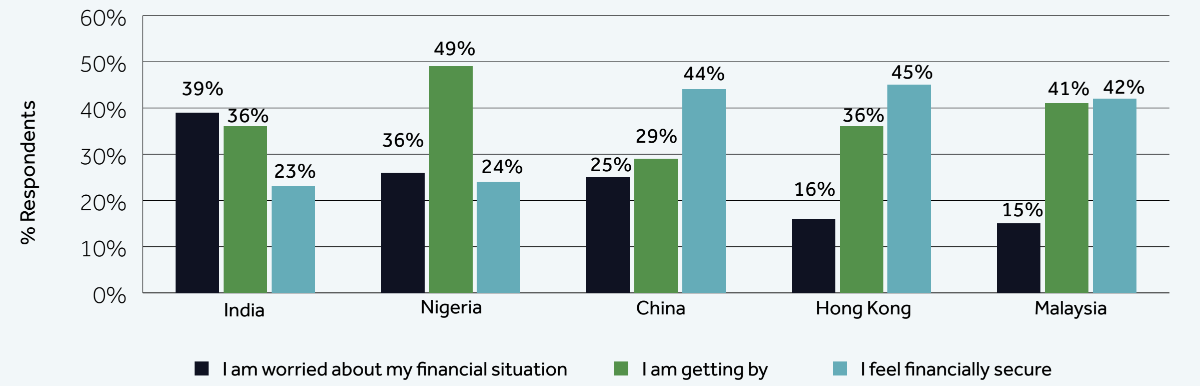
The respondents split into roughly three equal groups in terms of their opinions on their financial security. 27% or 790 respondents feel worried or very worried about their finances, 36 percent (1,062) feel financially secure, and the same number said they were "getting by". The most marked difference in financial security is being demonstrated by PGT students who are almost twice as likely as undergraduate students to be worried about their financial situation, 61% of respondents, private PBSA 65% and shared rented houses 62%. The small number of respondents who are living with friends and family rated value for money much higher (as might be expected), at 70% and 84% respectively.

Fig 13: How Would You Describe Your Financial Situation, Level of Study (2,911 responses, 2,964 total)



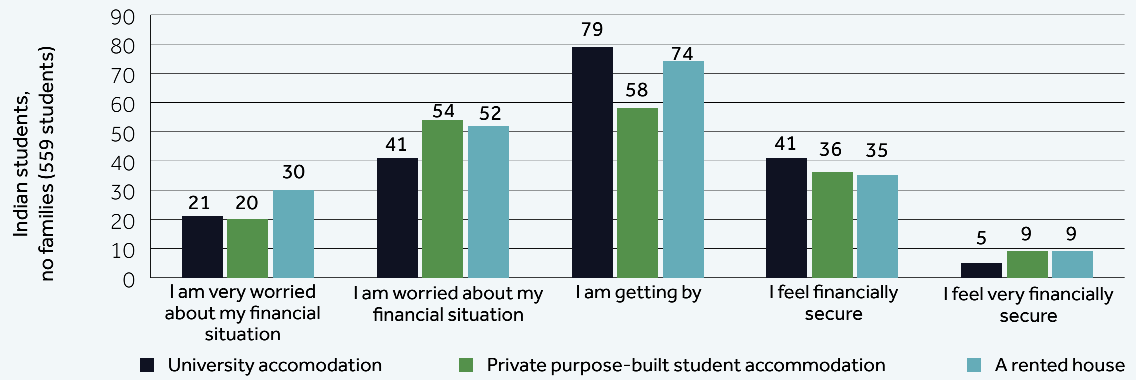
Students from India were significantly more likely to experience financial worries than from other source countries. However the research took place prior to the Nigerian currency destabilisation that occurred at the end of 2023.

Fig 14: How Would You Describe Your Financial Situation, Top Source Countries in the Study (1,704 students represented in the chart)



Looking specifically at Indian students by their type of accommodation can be seen in Fig 15. In most cases choosing to live in a shared house would be the more affordable option but students were still reporting high levels of financial worry. This may be related to fixed costs in houses, where bills were not included in the headline rent and students may not have factored this in when calculating their overall living costs.

Fig 15: Indian PG students and Financial Security by Accommodation Type (559 students)



Postgraduate Research Students with Families

Of the 3,689 respondents to the survey, 588 (or 16%) are postgraduate research students. Within this group, 215 (37% or PGR, or 6% of respondents) indicated that they travelled with family, have been joined by family or will be joined by their family later. Given the smaller size of this group the findings have been kept at a higher level than in the earlier section on those travelling without dependents. However, this group is one of the hardest to house and is experiencing some of the most acute issues in housing market terms.

It is recognised that the PGR students with Families is a small sample size but the answers do allow some interesting conclusions to be drawn.

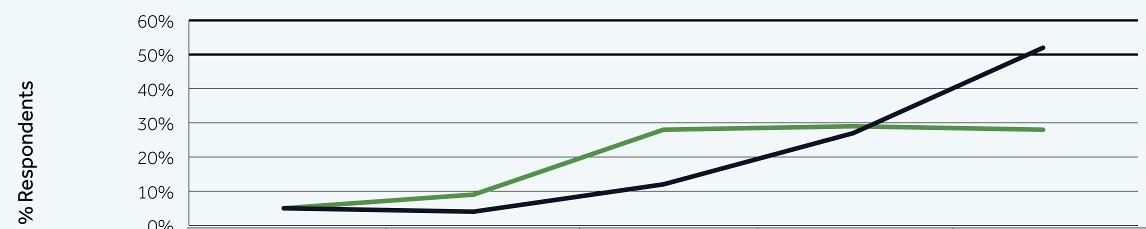
PGR students with families are much less likely to have received accurate information with just 49% of respondents stating this, as compared with 74% of students who arrived with no family ties (from the sections above).

This cohort were most likely to have found the place that they are living through an estate agent (34%) or friends (23%), with university websites being the source of current accommodation for just 14% of students, as compared with 24% for all students without families and 27% for undergraduates with no dependents.

This cohort is most likely to be studying at a Russell Group university, with key source countries being quite different to the norm. Saudi Arabia (25 respondents), Indonesia (23), Nigeria (16) and Turkey (15) are the most represented countries, but most interesting in this regard is that there are 46 countries represented by the 215 respondents.

Looking at the ease of finding somewhere to live, PGR students with families report more difficulties than PGR students travelling alone (who in the last section were highlighted as those who experienced the most difficulties). More than half of PGRs with families reported it to be much more difficult than expected to find somewhere to live, and overall 79% of found it more difficult to find somewhere to live as compared with 57% for PGRs with no family.

Fig 16: Finding Somewhere to Live versus Expectations? (215 PGR with families, 367 PGR travelling alone)



	Much easier than expected	Slightly easier than expected	As expected	Slightly more difficult than expected	Much more difficult than expected
PGR with Family	5%	4%	12%	27%	52%
PGR no dependents	5%	9%	28%	29%	28%

The open text responses on this subject are particularly interesting – highlighting both issues accessing the housing market and a myriad of NHS/health issues:

Comments from PGR Students with families

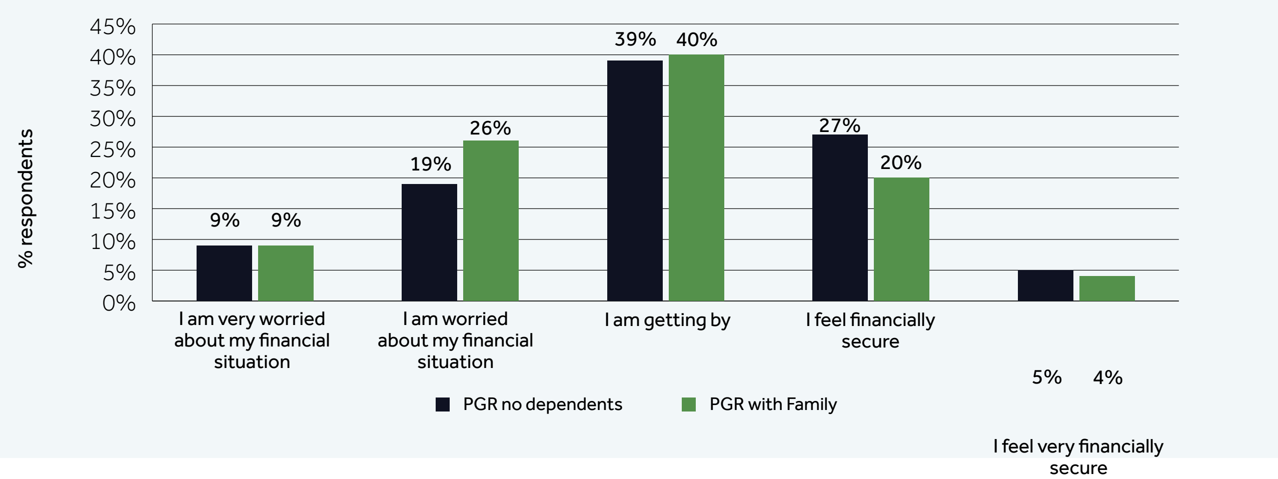
"My experience of arriving in the UK is amazing. Apart from the difficulty to finding housing in the private sector as university has very limited flats for PGR students with families!" Student from Bangladesh, Nottingham

"I wish I had been told that there is insufficient good-quality accommodation near the university area." Student from Saudi Arabia, Sheffield

"I am staying in the university house and that has been my best experience, having always received maximum support from the housing team." Nigerian student, Nottingham

Looking at financial security, PGRs with families feel similarly to PGRs without, feeling just slightly less financially secure.

Fig 17: How Would You Describe Your Financial Situation?
(215 PGR students with families, 367 PGR students travelling alone)



The NPS score for PGR students with families is -19, significantly better than PGR students without dependents (-30). This may suggest that the amount of careful planning required to move a family to the UK has resulted in better outcomes than for those entering the housing market alone.

Policy Implications

The research highlights that where students are living with the university or in private PBSA, overall experiences for international students are not positive, achieving an NPS score of -25.

Provision of information

International students are making decisions at distance and therefore the accuracy of the information they are given during the search for accommodation is critical. Although there are many organisations who represent international students and highlight the different needs of this group in terms of their experiences in the housing market, there is an ongoing need to provide support to international students.

Information should include:

- Setting expectations of what it is going to be like to live in the UK
- Sense-checking information provision to ensure that it can be understood by those who have no experience of the UK housing market
- Providing guidance on the housing market to all students, including
  - Signposting to landlords and letting agents who are more likely to house students, rather than allowing students to launch a search into the mainstream rented housing market
  - Given that those students who are living in houses are least likely to feel financially secure, providing simple information on what the housing market implies, including the hidden costs of the HMO rental market including bills and potentially travel costs, is essential.

By way of an example, in Leeds in 2024 Unipol has been working with HEI partners to deliver dedicated and targeted pre-arrival house hunting advice sessions to students in their home countries via webinars. Each webinar provides an opportunity for student feedback to enable further refinement of the content for future sessions and for one-2-one advice to be delivered where requested. Multiple sessions will be run from May to September.

Managing Expectations

The students whose experiences are worst are seemingly where expectations have not been managed prior to arriving in the UK. This is impacting most on the groups of students whose accommodation needs are least likely to be met directly by the university and/or there is no dedicated housing solution:

- January intake: Students arriving in January where there is unlikely to be dedicated housing provision found it much more difficult to find housing
- Postgraduates accessing the housing market, who were least likely to have been able to find information on their housing requirements and solutions
- Families: PGs with families, of which the PGR market will continue to exist even following the changes in the visa policy. PGR students with families relied much more on letting agents and friends than the university, much less so than other student groups
- Non-Russell group universities were least likely to have received accurate information before they arrived.

Many students do not ask for help, but utilise information they find independently online. However, preparing students for the difficulties/uncertainties rather than providing no information is the subject of many of the comments shared by students in the survey. Good practice would see a joined-up approach to information provision between universities accommodation offices, international officers, agents, private PBSA providers, letting agencies and other sources of information such as UKCISA.

In addition information should be tailored to the various cohorts of students, to cater for the different needs, options and choices that students have, and helping them to avoid the pitfalls of the UK housing market.

Specialist Support

Postgraduate students are perceived by most universities as the future source of recruitment and financial security. To improve the experience of certain student groups, which may include January intake and PGR students with families and given the diversity of countries attracted to the UK, universities must have access to accommodation expertise and ideally dedicated personalised support that recognises the differing needs of each student group.

Final Thoughts

Not all the issues raised in this survey will be possible to resolve, but the provision of information advice and guidance, even in the situations where the university does not have all the answers, must be an area of focus for all institutions who wish to continue to recruit significant numbers of international students.

Acknowledgement

Unipol would like to thank all those universities and students who took part in this research and those partner organisations working in the sector, who gave up time to help shape and focus the questions asked in the survey.

Survey Methodology

Between 12th June and 31st July M.E.L Research sent out an online survey asking international students, via their universities, students' unions and various international student societies, about their housing situation.

Aim: The aim of this survey was to understand the experiences of international students, so that Unipol and the universities it works with can help to improve living experiences for international students in future. In addition it was hoped that then findings would inform all those involved in providing advice or housing for international students.

The primary objectives of this research were:

- Understand where current students are living
- Identify the most common 'struggles' faced by international students
- Assess the main issues facing international students in accessing the UK housing market.

3,698 students from 30 universities took part in the research, with active participation from 15 universities.

Endnotes

i UK student recruitment numbers down, but is that the whole story?
ii iQ Overview - Factsheet 2022 (1).pdf (iqstudentaccommodation.com)
iii Fresh surpasses record positive NPS score (thisisfresh.com)

General Information

Unipol is a unique student housing charity, established in 1975. We are passionate about helping students find the best housing. We provide help and assistance to students renting in the private sector, provide direct housing to students in Leeds, Nottingham and Bradford, run a number of accreditation schemes and train and promote best practice in student housing.

Further details about Unipol can be found here www.unipol.org.uk