Future proof:

Meeting the diverse needs of international students.

Global Student Living | cubo

Contents.

Foreword.

CUBO and GSL have collaborated to produce this report using GSL's large data source to give a high-level overview of the PBSA and University Accommodation sector.

The report in many cases confirms the belief that demands for higher quality and better services and support are growing, but gives evidence across the country of real student feedback to support and provide detail of this: it also repeats the evidence from other sources that accommodation is one of the significant non-academic factors that affects choice of university.

One thing that CUBO particularly wanted a focus on was key international student markets and in particular China, India and Nigeria. These critical markets can be marginalised in terms of research and the insights here provide food for thought in these critical, but perhaps less studied areas.

This report represents our first venture in providing a cross sector, cross country report into student feedback on student accommodation. We hope that you find it useful and are keen to get your feedback and comments so that we can build upon this research.

Jo Hardman
Director of Commercial Services,
Lancaster University

cubo

Executive summary.

The Global Student Living Index (GSL Index) is a valuable insight and performance improvement tool for student accommodation providers.

Based on GSL Index 2023 Q2 data, this report looks at the overall student accommodation picture this Spring, including differences between university and private halls. It then explores the accommodation experience of the three largest international student cohorts studying in the UK and Ireland - those from China, India and Nigeria. Given the projected increase in the number of students from these countries, it is essential to better understand their needs to ensure a positive accommodation experience.

Key insights include:

— **The overall picture looks good this Spring**: student satisfaction levels are now higher than they were pre-COVID, and the gap between university and private halls is closing. More students than ever say that their accommodation offers good value for money. In particular, university halls have improved performance in some of the areas that we know drive overall satisfaction.

— **Accommodation is more important than ever, especially for international students.** When it comes to the decision of where to study, accommodation plays a more important role in the decision-making process for international students. This is particularly true for those from Nigeria and India.

— **A one size fits all approach is not going to shift the needle if we want to move students who are NPS[1] Passives and Detractors to NPS Promoters.** At first glance, our focus international student cohorts seem more satisfied than international students overall and those from the UK and Ireland. However, a deeper dive into the figures highlights distinct differences and needs across each nationality, underscoring the diversity of the international student community, and the importance of tailoring responses accordingly.

More students than ever say that their accommodation offers good value for money.

— **Students have increasingly high expectations and view their accommodation through a consumer lens.** While this may be a natural by-product of improved facilities and higher price tags, the fact that customer service-related aspects of accommodation increasingly drive satisfaction suggests students view themselves not only as residents but also as customers. In the early days of the GSL Index, physical features of accommodation mattered most, and then later came a focus on the overall experience. It seems likely that in future, customer service will be where the battle is won.

— **The data highlights a gap between student expectations and reality.** Analysis of the data suggests that there is a mismatch between what students are expecting in terms of the range and quality of facilities in their accommodation and actual provision. This highlights the importance of providing comprehensive information at the outset to support student decision-making and minimize the expectation-reality gap.

— **Importance of continuing to prioritise wellbeing.** While it is clear that efforts to support wellbeing and promote cohesion and a sense of community are gaining traction, challenges remain in this area. Tailored approaches are likely to be required given that different student groups struggle in different areas. As an example, Indian and Nigerian students are more likely to be funding their rent through part-time work, yet finding part-time work is the most significant struggle reported by these two student groups. Differing cultural perceptions of mental health may cause students to downplay mental health issues and be reluctant to seek support.

— **Social events are a key driver of satisfaction for many international students, yet these are not meeting expectations.** The data highlights that students across all cohorts want more social events, yet the reasons for this are unclear. It seems possible that international students may be connecting primarily with others from the same country, and so the desire for more social events may reflect a desire to connect with students from more diverse backgrounds. Or it may be that current events are just generally not meeting expectations. Gaining further insight into this issue should be a priority.

1. NPS or Net Promoter Score – Net Promoter Score is a commonly used index that organisations across many sectors use to track their overall performance and the likelihood of customers recommending their products or services. It is based on the question "On a scale of 0 - 10, how likely are you to recommend X to a friend or family member?" Scores are grouped into Detractors (0 - 6), Passives (7 - 8) and Promoters (9 - 10).

Introduction.

As students focus more than ever on their overall university 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.

With responses from over one million students since its inception, and more than 250 million data points, data from the Global Student Living Index (GSL Index) provides rich insight into what students expect from their accommodation and the factors that drive student satisfaction.

In part one of this report we summarise recent trends in the GSL Index data, to deepen our understanding of how the student experience has evolved, and continues to evolve. By highlighting areas where performance falls short of expectations, as well as areas where things are more positive, we aim to help both university and private accommodation providers deliver a better experience and identify issues that require particular focus.

In the second part of the report, we explore the ways in which the accommodation experience differs between international students and those from the UK and Ireland. In particular, we take a closer look at what the GSL Index data tells us about students from the UK's three largest sending countries; China, India and Nigeria. With the balance between these markets shifting, understanding how to meet the diverse needs of these different student cohorts will be critical to successfully meeting future demand.

In the third and final section we bring all this insight together with the latest data on inbound market trends to make both strategic and tactical recommendations about how to improve student experience now, and to successfully navigate the future.

Survey statistics:
Sample sizes vary across waves of the survey. The 2023 Q2 data in this report is based on responses from:

nearly **43,000** students across **336** university halls and **821** private halls in the UK & Ireland.

The sample comprises:

UK & Ireland:
27,730 students

China:
3,850 students

India:
2,333 students

Nigeria:
937 students

All International:
15,180 students

The national picture.

Accommodation plays an increasingly important role in the decision of where to study.

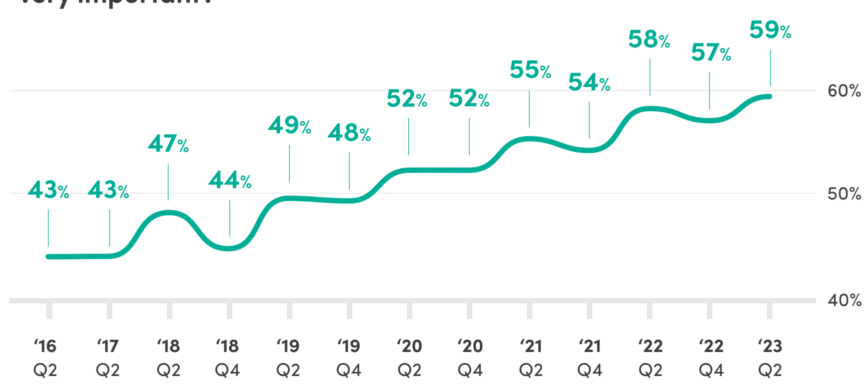
The importance of accommodation for students when considering where to go to university is growing and is more important than ever, with the number of students saying that accommodation is a 'very important' decision-making factor at record highs.

Students are placing a higher priority on budget and privacy than previously.

Proximity to place of study continues to be the top priority for students when deciding where to live, as do condition and quality of the accommodation and safety and security. However, this Spring, the impact of cost-of-living pressures is more apparent, with budget (a factor that has been steadily increasing in importance over time), moving up the list of priorities.

Students also appear to be placing a higher priority on privacy and having their own space. In 2022 Q4 the number of students who prioritised living on their own increased from 30% the previous year to 36%. This figure has been slowly increasing over the past few years and appears to be reflective of a changing market. Over the same period, we saw the proportion of students who prioritise availability of communal spaces drop to 35% from 40% in 2021 Q4. There has also been a decline in the number of students prioritising opportunities for social interaction (from 39% to 34%). This does not mean that students want to miss out on a social experience. The data highlights that the social experience is important for students, however, rightly or wrongly, it is something more students are prepared to compromise on when choosing where to live.

The importance of accommodation in the decision of where to study – 'Very important'.



Student priorities in their accommodation search.

2021 Q4	2022 Q4
Travel time to study	Travel time to study
Safety and security	Condition and quality
Condition and quality	Safety and security
Ensuite	Budget
Budget	Bedroom (new)
Kitchen size and facilities	Ensuite

Student satisfaction levels are now higher than they were pre-COVID.

Overall levels of satisfaction have increased from last Spring (77% up from 74%), to the point where 2022 Q4 and 2023 Q2 satisfaction levels both exceeded pre-COVID levels.

This increase is primarily due to university halls showing improvements across some of the specific factors that we know are strong drivers of overall satisfaction.

Students at GuildHE university halls are more likely to rate their overall level of satisfaction as good or very good this Spring, while those from Million+ university halls are significantly less likely to rate their satisfaction as good or very good. (See Performance by Mission Group). At a country level, students in university halls in Scotland are the least likely to be satisfied, while those in Wales are most likely to be satisfied.

Overall satisfaction by country (university halls):

Whole UK: 75%

Northern Ireland: 78%

Scotland: 66%

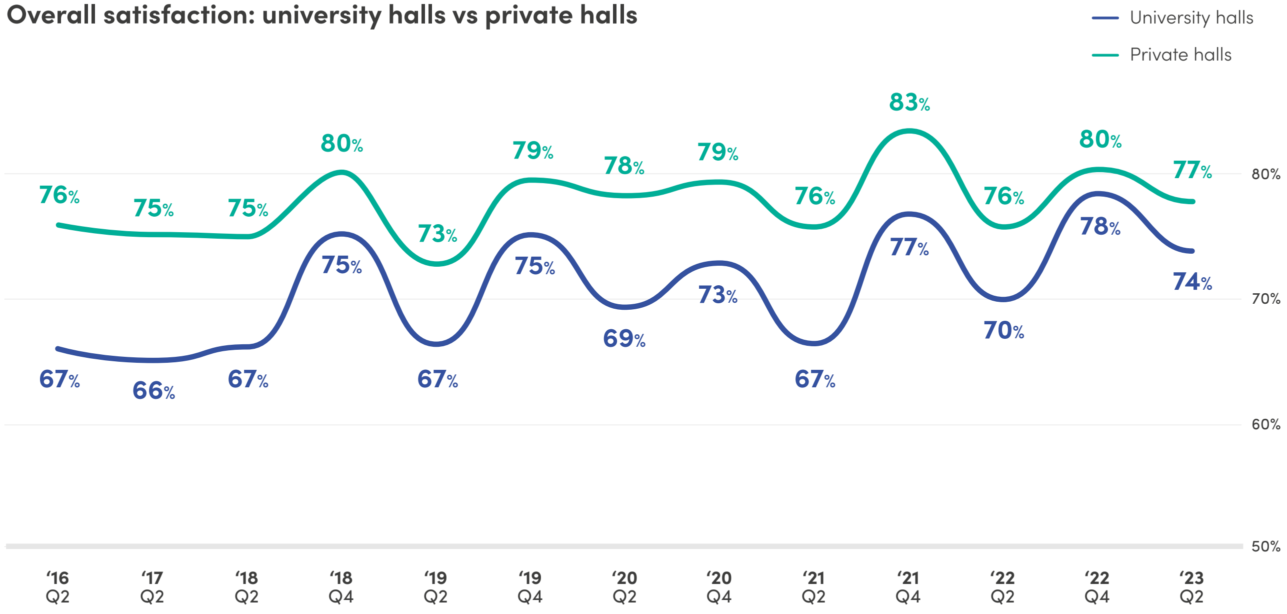
Wales: 81%

Although the gap between private and university halls is closing, private halls continue to outperform universities in key areas.

Over the past few years, the top key drivers of satisfaction have remained relatively unchanged. It's no surprise that students want attractive, well-managed and high-quality accommodation that provides good value for money!

However, over time we have seen that some factors impact satisfaction more prominently in Autumn than Spring and vice versa. As an example, each Spring we tend to see the more 'human' elements of accommodation such as student care and support and communication appear higher in the list of top drivers. This reflects a greater need for these features as the academic year progresses, exams set in and students need stability and support.

Overall satisfaction: university halls vs private halls



University halls vs private halls performance (percentage who rate positively).

	Uni halls		Private halls	
	2022 Q2	2023 Q2	2022 Q2	2023 Q2
Value for money	51%	58%	58%	63%
Condition and quality	66%	71%	74%	75%
Overall management	71%	75%	79%	77%
Design and visual appeal of building	61%	65%	72%	71%
Bathroom facilities	60%	60%	71%	68%
Kitchen facilities	60%	61%	66%	66%
Communication	71%	73%	76%	77%

Factors influencing value for money perceptions:
– Overall management
– Bedroom
– Condition and quality
– Laundry
– Kitchen size

Key drivers of satisfaction with overall management:
– Responsiveness
– Staff knowledge
– Ease of reporting
– Maintenance
– Staff friendliness

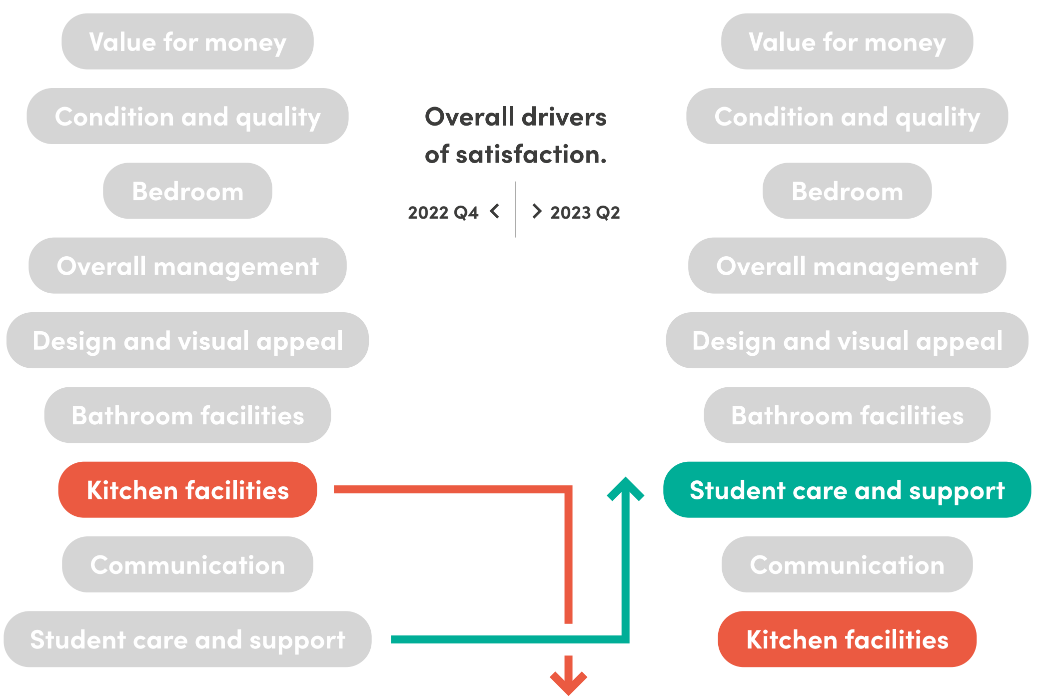
Key drivers of satisfaction with bedroom:
– Design
– Bedroom size
– Quality of furniture etc.
– Bed size
– Comfort of study area

Satisfaction with overall management has dropped slightly from 77% to 76% in the past year, however, there has been a shift in levels of satisfaction with overall management across different accommodation types (See page 9). Despite pressure on rents, satisfaction with overall value for money has actually increased from 57% last Spring to 62% this year.

While private hall satisfaction with overall management has dropped from 79% to 77% this Spring, levels of satisfaction with those aspects of management that matter most, particularly responsiveness, have largely remained steady or have even increased slightly since last Spring. This drop in overall satisfaction with the management of private halls may be further confirmation that higher rents come with increasingly higher expectations, particularly in times of increased financial pressure. During the same period, university hall satisfaction with overall management increased from 71% to 75%. This appears to have been driven primarily by improvements in staff friendliness (75% to 79%), maintenance (64% to 69%), and responsiveness (65% to 69%).

Satisfaction with overall management has remained steady at

77%



New GSL Index and Operational Delta scores hint at hidden university successes.

Comparing the overall performance of university vs privately managed student accommodation is fraught with difficulty. University operating teams often rightly point out that much of the private stock in their city is simply newer and shinier, and there's no doubt that the condition of a building has a 'radiating' effect on satisfaction scores across the survey. At the same time, there are private operators who work with (or even specialise in managing) older stock well and profitably.

This year GSL have introduced a new global KPI for student accommodation – the Index Score (0 – 100). Based on more than a decade's research, the Index Score is designed to provide a more broad-based KPI than overall satisfaction alone, and a more stable and fairer measure than NPS. Together this goes some way towards providing more robust and comparable benchmarking of performance between properties and portfolios.

The Index Score is also broken down into both 'structural' elements (building and infrastructure) and 'operational' elements (service). Using a regression model based on analysis of around half a million student survey responses, we have derived a measure to allow operating performance to be evaluated *independently from the underlying condition of the building*; the Operational Delta.

Put simply, the Operational Delta indicates whether the operational performance is higher (+ve) or lower (-ve) than *should be expected given the condition of the building(s)*. Encouragingly for universities, the very first analysis of this data for 2023 Q2 shows a private sector Operational Delta of -0.7, while universities achieve an Operational Delta of +2.1. The results suggest that, given similar stock condition, universities would significantly out-perform their private sector counterparts.

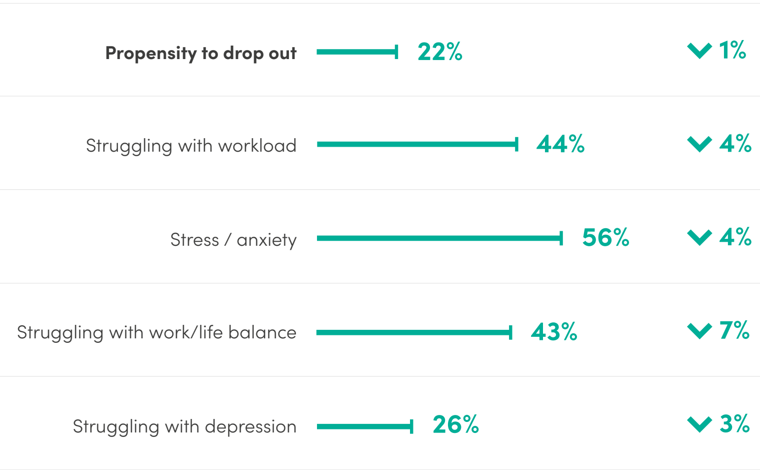
The Index Score (and Operational Delta) are exciting new tools for evaluating performance that will bring new insight into the analysis of different forms and modes of student accommodation, and we look forward to sharing further insights as we learn more in the coming years.

Key measures of wellbeing are better than they were last Spring.

Student wellbeing measures are always higher in Autumn, at the start of an academic year, compared to Spring, and this year is no different. However, there are marked improvements across all measures this Spring compared to last. In particular, it is encouraging to note that the number of students saying they are seriously considering dropping out has decreased by 1%, although this is still higher than prior to COVID (19% in Q2 2019).

Mental health concerns.

Q2 2023 data, comparison with percentage change from 2022.



The 'sense of community' in accommodation has increased slightly from Autumn to Spring.

While students in university halls are more likely to say that accommodation has a negative impact on their wellbeing, (21% vs 15%), university halls perform better across some social statements.

University halls vs. Private halls performance.

(2022-2023)

	Uni halls		Private halls	
	2022 Q2	2023 Q2	2022 Q2	2023 Q2
Formed close friendships	66%	68%	57%	63%
Enjoy socialising	61%	63%	52%	58%
Strong sense of community	47%	53%	43%	53%
Want more social events	53%	54%	48%	54%

Of particular note, is that the number of students who agree that there is a 'sense of community' in their accommodation generally drops from Autumn to Spring. However, this academic year, this figure has increased from 52% in Autumn to 53% this Spring. This appears to be primarily driven by an improvement in private hall performance. This may be an indication that the increased efforts made by residential teams to foster a sense of community throughout the academic year have gained traction. It will be interesting to see whether this carries forward into even higher scores at the start of the 2023/24 academic year.

Financial.

The 2023 Q2 GSL Index data reveals that despite strong value-for-money scores for accommodation, cost-of-living pressures **are** beginning to be felt by students. The number of students struggling with budgeting and those who say they struggle with having enough money to get by has increased. This Spring there are also fewer students who say they would improve aspects of their accommodation for increased rent, and more students who are happy to keep things the same. Finding part-time work is also more difficult. This year, 37% say they are struggling to find part-time work, whereas, in 2022 Q2, only 32% of students reported finding part-time work as a struggle. While these figures signal that day-to-day cost-of-living pressures are increasing, this does not appear to be impacting students' willingness to invest in the long-term benefits of a positive accommodation experience.

37%
say they are struggling to find part-time work this year.

Does building size make a difference to the student experience?

When it comes to the overall drivers of satisfaction, there are only slight differences of 1% or 2% between student ratings in different building sizes. For example, large buildings with more than 600 beds score 2% lower in satisfaction with value for money than small buildings (fewer than 300 beds), or mid-sized buildings (300-600 beds). However, while there are no single big differences, mid-sized buildings with 300-600 beds consistently rank slightly higher across most measures, suggesting that this sized building provides a more optimal experience for students overall.

Mid-sized buildings with between 300-600 beds also appear to have some advantages when it comes to the more human aspects of the accommodation experience. For example, student care and most aspects of management are rated slightly higher. Conversely, students living in large buildings with more than 600 beds rank overall management worse across every measure (except social activities), than those in other building sizes. Students living in the larger buildings with over 600 beds are more likely (19%) to say that their accommodation has a negative impact on their wellbeing than those in small or mid-sized buildings (15%).

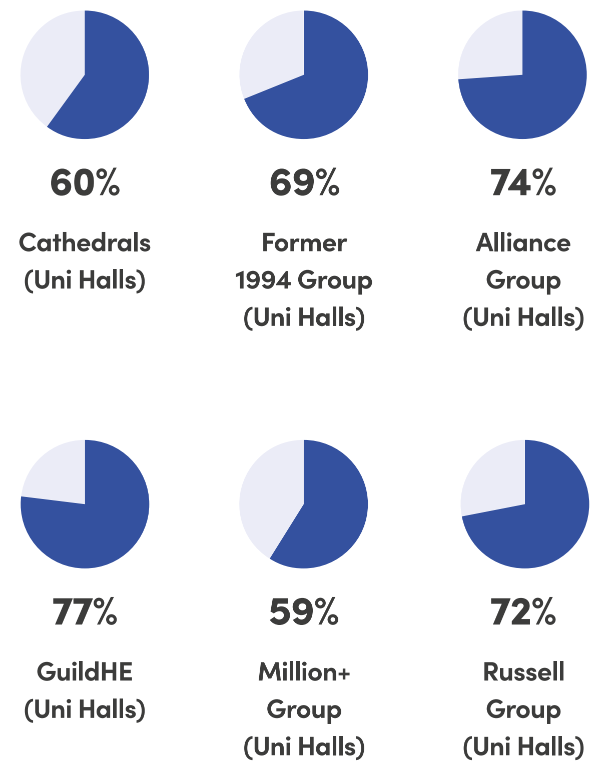
Smaller buildings slightly underperform others when it comes to student ratings against a range of social statements. For example, students are less likely to say they have formed close friendships, enjoy socialising or feel a strong sense of community when living in a building with less than 300 beds.

While looking at the overall picture definitely points towards mid-sized buildings being preferable, there are some cohorts for whom larger buildings offer a distinct advantage, as we'll see later in this report.

Performance by mission group.

Students from GuildHE university halls are the most satisfied overall with their student accommodation with Million+ and Cathedral Group generally trailing:

Overall satisfaction by mission group 2023 Q2 (Satisfaction 'good' or 'very good').



Looking at a breakdown of the specific factors driving overall satisfaction, Alliance Group and GuildHE university halls are leading the way on almost all, with the exception of student care and support where it's clear Russell Group institutions have invested significantly.

Drivers of satisfaction by Mission Group 2022 Q2	Cathedral (Uni Halls)	Former 1994 Group (Uni Halls)	Alliance Group (Uni Halls)	GuildHE (Uni Halls)	Million+ Group (Uni Halls)	Russell Group (Uni Halls)
Value for money	50%	51%	55%	53%	45%	49%
Condition and quality	57%	67%	70%	72%	60%	69%
Bedroom	71%	79%	80%	86%	69%	82%
Overall management	61%	72%	75%	72%	57%	69%
Design and visual appeal of building	50%	54%	67%	73%	51%	60%
Bathroom facilities	51%	49%	61%	71%	54%	58%
Student care and support	55%	61%	66%	59%	51%	67%
Communication	62%	68%	76%	61%	52%	75%
Kitchen facilities	43%	50%	65%	60%	54%	56%

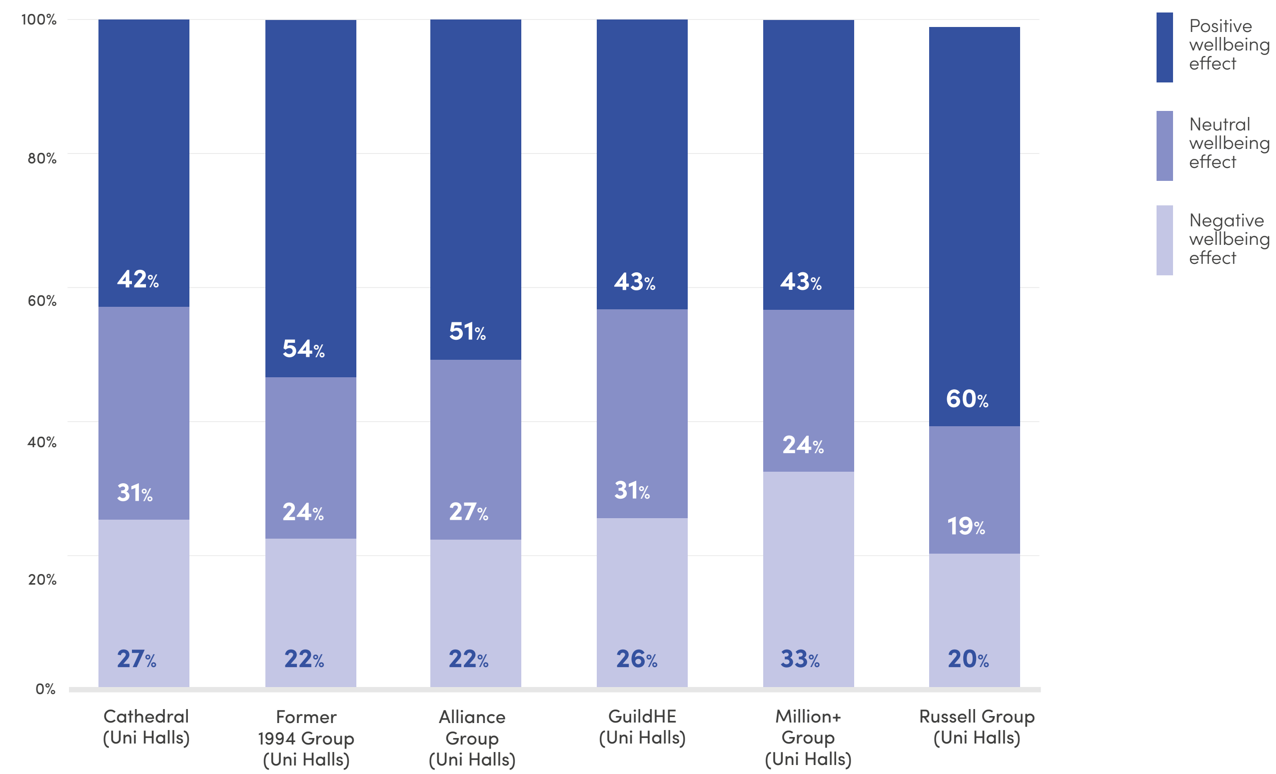
Alliance Group and GuildHE university halls also generally perform better on those factors that shape whether accommodation is perceived as offering good value for money:

Key drivers of value for money perceptions by Mission Group 2022 Q2	Cathedral (Uni Halls)	Former 1994 Group (Uni Halls)	Alliance Group (Uni Halls)	GuildHE (Uni Halls)	Million+ Group (Uni Halls)	Russell Group (Uni Halls)
Overall management	61%	72%	75%	72%	57%	69%
Bedroom	71%	79%	80%	86%	69%	82%
Condition and quality	57%	67%	70%	72%	60%	69%
Laundry	43%	45%	46%	44%	46%	47%
Kitchen size	43%	50%	65%	60%	54%	56%

Alliance Group university halls are consistently ranked more positively on those factors that drive satisfaction with overall management.

Key drivers of satisfaction for overall management by Mission Group 2022 Q2	Cathedral (Uni Halls)	Former 1994 Group (Uni Halls)	Alliance Group (Uni Halls)	GuildHE (Uni Halls)	Million+ Group (Uni Halls)	Russell Group (Uni Halls)
Responsiveness	62%	68%	70%	58%	59%	66%
Staff knowledge	67%	71%	76%	68%	66%	72%
Ease of reporting	63%	71%	73%	66%	60%	70%
Maintenance	63%	68%	70%	58%	64%	61%
Staff friendliness	73%	74%	80%	71%	71%	76%

Impact of accommodation on wellbeing by mission group. 2022 Q2



The international student accommodation experience.

151,690
International students **are from China**

96% live in private halls	4% live in university halls

UK/Ireland students

74% live in private halls	26% live in university halls

44,195
International students **are from Nigeria**

79% live in private halls	21% live in university halls

126,535
International students **are from India**

84% live in private halls	16% live in university halls

International students in the UK.

The latest available figures from HESA show that the UK welcomed a record-high number of international students in 2021/22, with a total of 679,970 students studying in the country. Of this number, 120,140 students were from the EU, while 559,825 students were non-EU.[2] Just over half (54.7%) of the international student population are postgraduate taught and research students.

UCAS predicts 60% increase in international undergraduate students by 2030.

In 2021/22, the largest proportion of international students came from China, comprising 22.3% of the total. India ranked second with 18.6%, while Nigeria followed in third place, with 6.5%. In the four years to 2021/22, the number of students from China increased from 107,215 to 151,690. India has witnessed the biggest increase in student numbers during the same period, rising by a massive 522% from 20,335 to 126,535 students. Though the total number of Nigerian students is lower than that of China and India, Nigerian enrolments in UK universities have increased by 313% in the same period, from 10,685 students in 2017/18 to 44,195 students in 2021/22.

UCAS predicts a 60% increase in international undergraduate students alone by 2030, and that China will continue to be the UK's largest sender of international students. UCAS also predicts that demand from students from India, a UK International Education Strategy (IES) priority country will continue to grow.[3] Nigeria, Indonesia, Saudi Arabia, and Vietnam are also priority countries under the IES.[4]

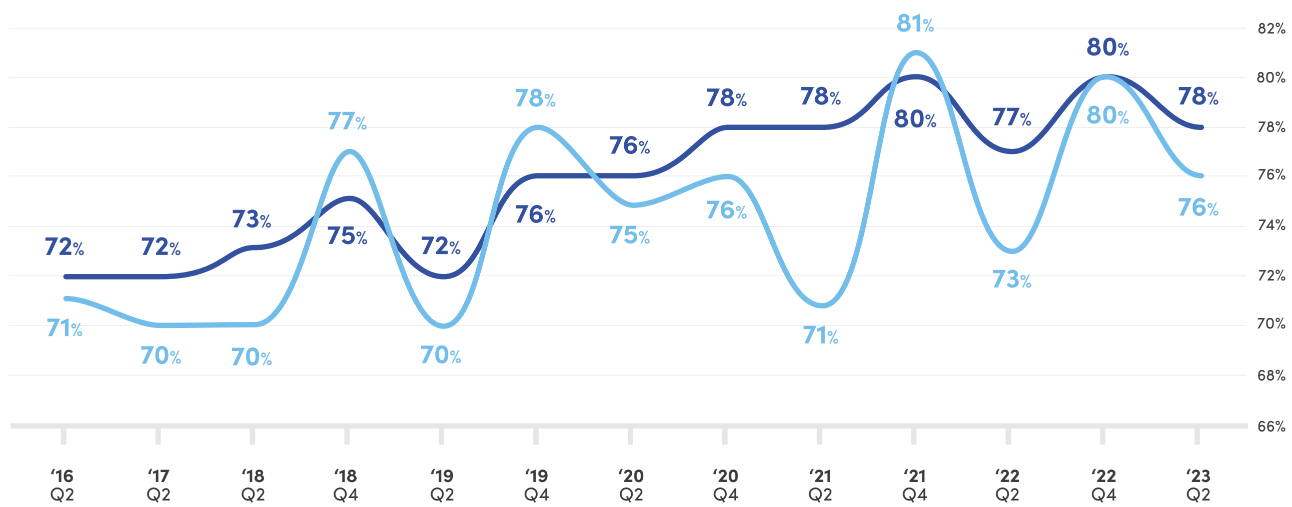
In 2019, the Government introduced a two-year post-study work visa for international students, which extends to three years for postgraduates, starting from the 2020/21 academic year. This has resulted in significant growth in demand from China, India, and Nigeria.[5] It should be noted however, that some predict that the growth of the Nigerian and Indian markets may slow due to a policy change which will restrict international postgraduate students from bringing dependents with them to study in the UK, due to take effect January 2024.[6]

In Ireland.

Ireland's international student population has increased from just over 13,000 students in 2007/08 to more than 25,000 international students in 2020/2021. Students from Non-EU countries are the largest group of international students in Ireland. The United States, China and India are Ireland's three largest source markets, with India the fastest-growing. In 2007/08, students from India represented just 3% of all international students studying in Ireland, however, this had grown to 14% by 2019/20.[7]

2. *HESA. Higher Education Student Statistics: UK, 2021/22 – Where do HE students come from? Accessed May 2023.*
3. *UCAS, What is the Journey to a Million Mean for International Admissions?, Accessed June 2023*
4. *Department for Education, International Education Strategy: 2022 progress update, (26 May 2022)*
5. *ICEF Monitor, Latest UK visa numbers indicate continuing strong growth in international HE enrolments this year, (15 March 2023)*
6. UK Home Office, Changes to student visa route will reduce net migration, (23 May 2023).
7. *Higher Education Authority, International Students, (July 2022)*

Student satisfaction between International and UK and Ireland students.



Accommodation is a more important factor in the decision of where to study for international students.

Accommodation is more important when making the decision of where to study for international students (59%) than students from the UK and Ireland (55%). However, its importance differs by nation – accommodation features far more prominently in the decision of where to study for students from Nigeria (77%) and India (74%) than those from China (61%), indicating that the importance of accommodation is only likely to continue to increase in the coming years.

When it comes to other factors that influence the decision of where to study, international students show higher levels of attention to most measured factors than students from the UK and Ireland. Interestingly, the course offered is significantly less important for Chinese students (82%) yet much more influential for UK and Ireland (90%), Indian (97%) and Nigerian students (95%). Chinese students prioritise the academic reputation of the university (86%) over the academic reputation of the course (81%), while Nigerian and Indian students place equal priority on both. These findings fit with other sector research which highlights that students from China prioritise destination and quality of education when deciding where to study abroad,[8] whereas students from India and Nigeria have a stronger focus on skills and employment.[9]

International students are more satisfied with their accommodation than those from the UK & Ireland.

International students are more likely (78%) to be satisfied with their accommodation experience than students from the UK and Ireland (76%). This may be partly due to the much larger number who live in private halls. It may also be that international students have different expectations, influenced by cultural experiences. Regardless, this tendency to be more satisfied is encouraging, given that international students are paying higher fees and living away from their families and their support networks.

However, it is interesting to note that Chinese (84%), Nigerian (83%) and Indian students (83%) have even higher levels of satisfaction than the broader international cohort. The reasons for this are unclear, however it is possible that because these are the three largest international student cohorts, services may have become better adapted to their needs over time, and there may be enough of a 'critical mass' of similar students in their accommodation for them to feel that a stronger support network is available than for other international students.

Although at a high level international students are more satisfied than their peers from the UK and Ireland, analysis of Net Promoter Scores (NPS)[10] for each group highlight that there are significant numbers of students from each cohort that are either NPS 'Passives' or 'Detractors', indicating opportunities to improve performance. Understanding the differences between, and the things that matter most to each cohort will be critical to this.

Chinese (84%), Nigerian (83%) and Indian students (83%) have even higher levels of satisfaction than the broader international cohort.

8. Chew, J., *Distinct Student Priorities and Preferences Set the Greater China Region Apart*, Navitas Insights, (21 December 2021)
9. Chew, J., *How regional variations play out for international students deciding on where to study*, Navitas Insights, (9 August, 2022)
10. *NPS or Net Promoter Score – Net Promoter Score is a commonly used index that organisations across many sectors use to track their overall performance and the likelihood of customers recommending their products or services. It is based on the question "On a scale of 0 - 10, how likely are you to recommend X to a friend or family member?" Scores are grouped into Detractors (0 - 6), Passives (7 - 8) and Promoters (9 - 10).*

International students place a higher priority on living alone, communal spaces and kitchen size and facilities than those from the UK and Ireland.

Travel time to study, condition/quality of accommodation, safety and security and budget all rank in the top five search criteria for students from the UK & Ireland and those from our focus international cohorts when deciding where to live. However, when it comes to other search criteria, there are areas where there are distinct differences between nationalities:

International students are twice as likely (51%) as students from the UK (25%) to prioritise living on their own.

Living on their own – international students are twice as likely (51%) as students from the UK (25%) to prioritise living on their own, but for Chinese students this figure is much higher (60%).

Kitchen size and facilities – while all students place a high priority on kitchen size and facilities in the accommodation search, this is significantly more important for students from India (70%) and Nigeria (64%) than those from China (61%) and the UK and Ireland (59%).

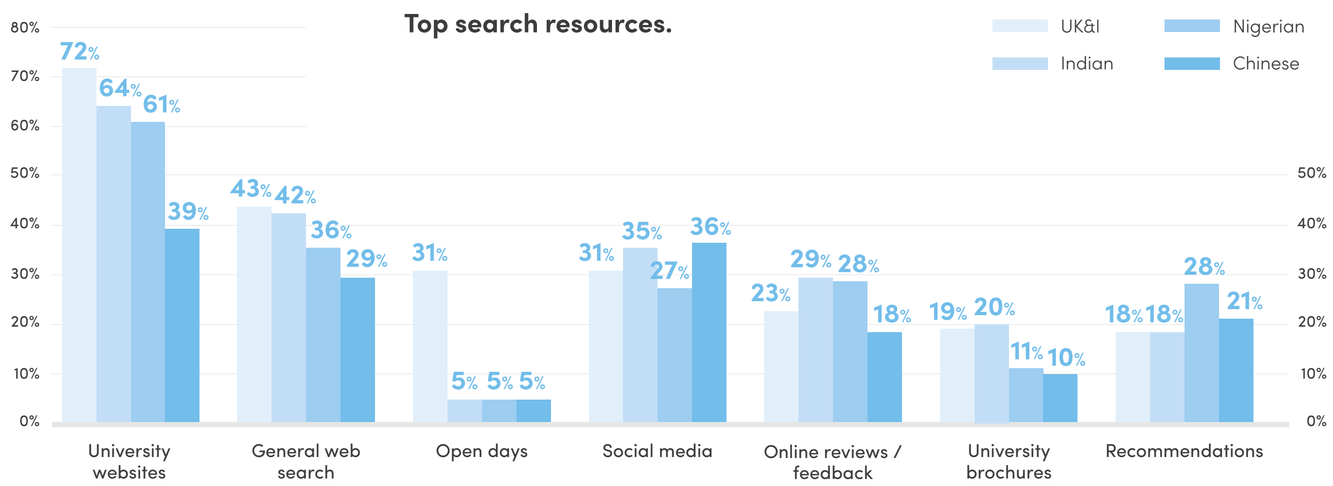
Communal spaces – are a much higher priority for Indian (48%) and Nigerian students (41%) than for those from China (35%) and the UK (34%). The reason Chinese students place a much lower priority on communal spaces is unclear, however, this appears to be linked to the strong focus of Chinese students on the academic aspects of their experience.

En-suite – Students from the UK (68%), India (70%) and Nigeria (70%) are significantly more likely than students from China (50%) to prioritise having an en-suite, however, this is presumably because Chinese students are more likely to prioritise living on their own entirely.

Flexible contracts – students from China (52%), India (48%) and Nigeria (56%) all value flexible contracts more than those from the UK and Ireland (26%). While the reasons for this are unclear, it seems likely to be a residual effect of the COVID-19 pandemic where many international students faced worries such as whether they could extend tenancies if unable to return to their home countries, or receive a refund for unused tenancies.[11]

Tech/Wi-Fi – is a priority factor much more for students from China (58%), India (66%) and Nigeria (64%) than those from the UK and Ireland (49%). It is not clear whether this reflects significantly different demands, or simply a higher level of uncertainty (and therefore concern) about the provision amongst international students.

11. Office for Students, Coronavirus Briefing Note: Student accommodation, (22 April 2020)



The type of resources used in the accommodation search differs by nationality.

There are distinct differences between each of our focus international cohorts in terms of the resources they use in their accommodation search. Students from China, for example, are much less likely to use university websites than others. This is likely to be related to the fact that agents play a more prominent role in the accommodation search, with almost one quarter of Chinese students using an agent. Agents are also used by students from India and Nigeria, although to a lesser extent.

Families play less of a role in the accommodation search for international students, although this differs by nation. Students from China and Nigeria are more likely to say that their family were not involved in their accommodation search than those from the UK and India.

International students are more likely to report a positive moving-in experience than those from the UK.

The moving-in experience plays a critical role in student retention. In particular, the welcome from staff and other students is key. It is therefore encouraging to see that improvements have been made in this area to the point where international students are now more broadly satisfied than those from the UK and Ireland.

This is a positive shift from previous years when international students rated their moving-in experience lower than those from the UK, and possibly a reflection of efforts made in this area by accommodation teams in recent years. The reason for lower levels of satisfaction in this area on the part of students from the UK and Ireland is unclear, however, it may simply reflect a greater willingness to be critical of an early experience in one's home country.

There are aspects of the moving-in experience that matter more to some nationalities than others and areas where the moving-in experience falls short of expectations. In particular, issues such as students not feeling welcomed by other students, and cleanliness not meeting expectations at move-in play a key role in whether students from our focus international cohorts become a Detractor or Promoter and highlight important early opportunities to improve overall performance. These are discussed further later in this report.

> *My room and the whole flat wasn't clean. Even found glass pieces on my bed. I complained about this to the management and they assured me that someone will come and clean it. The next day no one came so I had to clean everything. The management could have either ensured that the rooms were clean or offered some kind of compensation for the bad experience but they didn't do anything about it.*
>
> ~ Indian student

Student free-text responses also highlight that international students expect a certain level of staff support in terms of orientation to the building and local area. Students are disappointed when this type of support is not provided, or they are expected to move in without any support from staff at all.

> *Inform me about staff closing time. Got into town on a Friday due to a delayed bus at Heathrow and had to spend the weekend in a hotel.*
>
> ~ Nigerian student

> *On the first day of arrival it would be nice if someone from the staff could give a tour of the complex, explain how the various equipments work in the room (microwave/oven settings, induction, etc,). Inform us about the emergency exits and also safety hazards. It would be nice to also receive some kind of welcome package on the moving day (since this was promised but we never actually got anything).*
>
> ~ Indian student

> *When I moved in, it was the weekend. So there was no staff reception and I had to wait for about 4 hours. Maybe we can add an online reservation time slot. Provide a photo, phone number, and ID to move in directly.*
>
> ~ Chinese student

11. Frampton, N., Smith, J., & Smithies, D., Understanding Student Mental Health Inequalities: International Students, Student Minds, (2022).

Key drivers of satisfaction are different across nationalities.

While value for money, condition and quality and overall management are key drivers of overall satisfaction for all student cohorts, the individual aspects that shape the way that students view value for money and management performance differ by nationality. As an example, communication is a key driver of overall satisfaction for students from China and India but does not influence Nigerian student satisfaction as much. Rather, physical aspects of the accommodation matter more for Nigerian students. Communication does, however, play a role in whether Nigerian students view their accommodation as providing value for money.

As with other students, those aspects of the experience that have a customer-service component, particularly maintenance and communications, matter a lot to international students, although the extent to which they are a priority differs slightly. Free-text answers provide some further insight into international student expectations around responsiveness and service standards.

Differences between each international cohort are explored further later in this report, however, a key takeaway here is that there is diversity in the international student cohort, and taking the time to more deeply understand those factors that shape student perceptions is likely to support improved service delivery and contribute to higher levels of student satisfaction.

> *The efficiency should be raised. One time the water maintenance took place for over a week in my flat, and everyone in the flat either had not water supply at all or only had cold water.*
>
> *The repairman should come promptly when he sees the repair message. Instead of reporting the repair 5 times and not coming once.*
>
> *The reception only works from Monday to Friday, and 9am-6pm daily. 24h reception is what we expect.*
>
> ~ Chinese students

> *The bureaucracy in getting repairs or replacements done is not encouraging. I moved in here and complained to the manager on site that the chairs in my room were broken and I was directed to a website to make complaints.*
>
> ~ Nigerian student

> *Just do a quality job, the lift didn't work for at least two weeks.*
>
> *An overall and timely check of all rooms and resolving issues and repairs in advance of students move in would improve quality of living, especially considering the price.*
>
> ~ Indian students

International students report better mental health than those from the UK and Ireland, but are struggling with other aspects of wellbeing.

Students from the UK and Ireland are more likely (27%) to say they are strongly considering dropping out of university than those from China (10%), Nigeria (10%) or India (9%). However, there are areas where our focus international cohorts struggle more than those from the UK, and distinct differences between cohorts in terms of the extent to which they struggle with different types of issues.

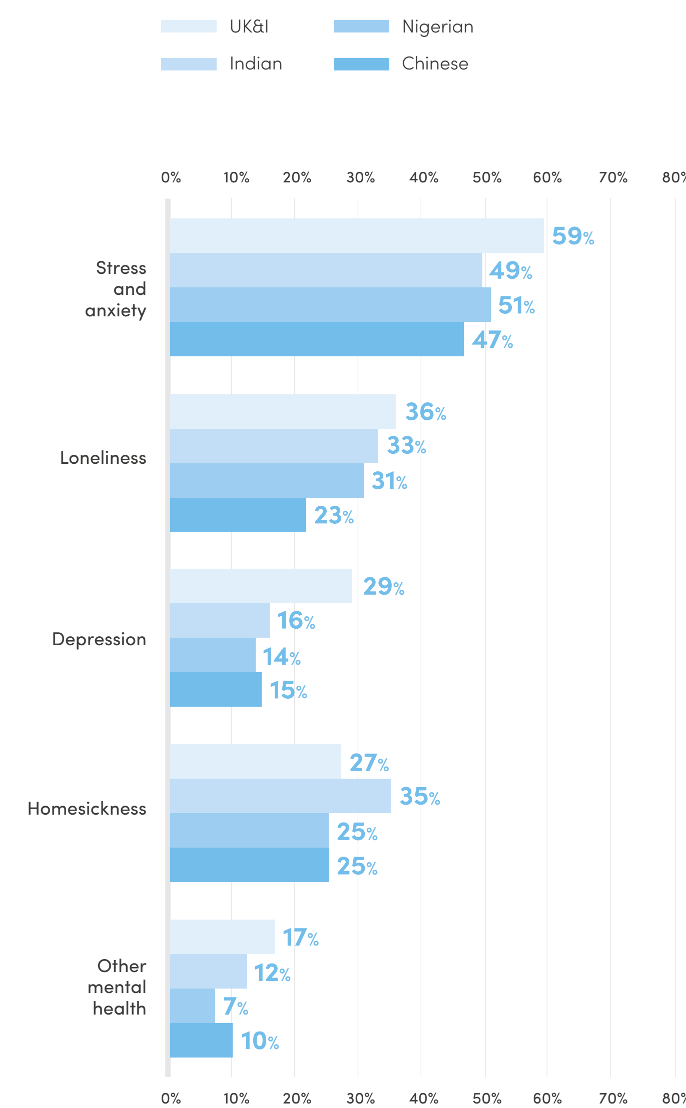
Mental health and loneliness.

Feelings of stress and anxiety are a significant issue for all nationalities - around half of all students say they struggle in these areas. However, this figure is significantly higher for those from the UK and Ireland (59%) than others. Students from the UK also report higher levels of loneliness, depression and other mental health issues than those from China, India and Nigeria. One exception is homesickness, which is reported by Indian students at much higher levels than other student groups.

Although it is positive to see lower reported levels of mental health issues among our focus international cohorts, it is possible that cultural norms surrounding the acknowledgement and discussion of such issues may lead some students to downplay their struggles or frame mental health issues differently.[12] Other Index data suggests that this could indeed be the case.

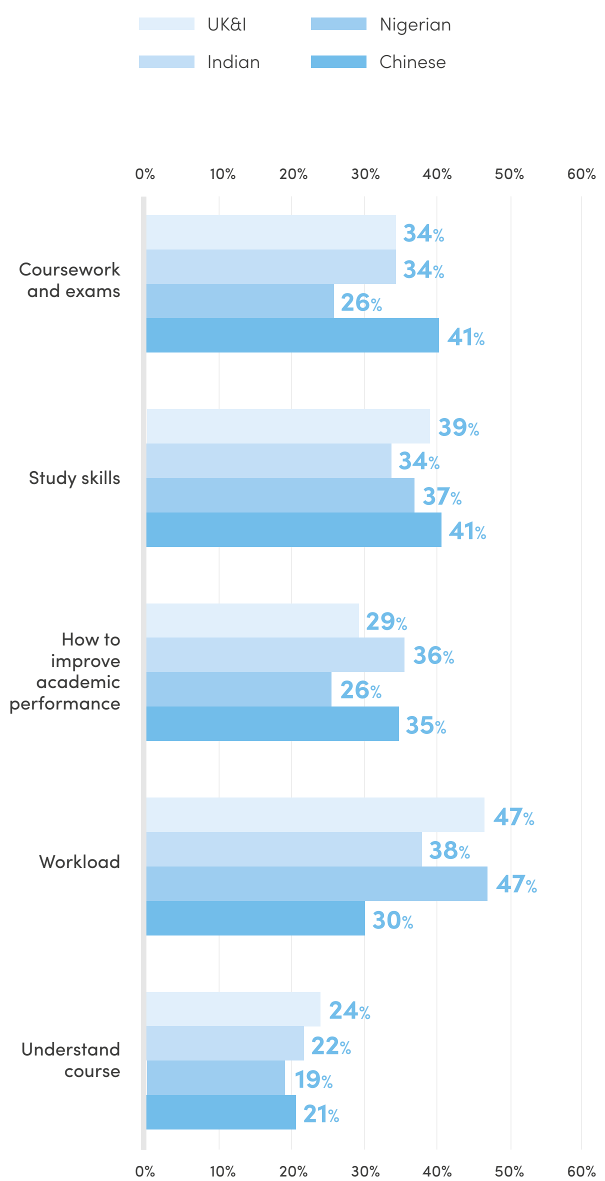
Homesickness is reported by Indian students at much higher levels than other student groups.

Mental health struggles for students.



12. Frampton, N., Smith, J., & Smithies, D., Understanding Student Mental Health Inequalities: International Students, Student Minds, (2022).

Academic struggles for students.



As an example, despite reporting lower levels of depression, Indian students are more likely than those from the UK and Ireland to say that they feel 'downhearted' all or most of the time and are also more likely than those from the UK to say they feel 'down in the dumps' all or most of the time.

Academic.

Digging deeper into the data, while students from China report that they are faring better in terms of their mental health, they are more likely to say they are struggling with issues connected to academic performance such as coursework and exams, gaining the right skills, study skills and understanding how to improve academic performance. Workload is significantly more of an issue for students from the UK (47%) and Nigeria (47%) than others.

Financial.

Students from the UK and Ireland are more likely to say they struggle to have enough money to get by and afford the lifestyle that they want. Chinese students are much less likely to report financial struggles. While all students say they struggle with budgeting, Indian students struggle most in this area.

Work and Career.

Indian and Nigerian students are more likely to report work and career-related struggles than those from the UK or China. This is likely to be partly related to the high value that Indian and Nigerian students place on working while studying and post-study work rights, and partly related to the fact that Nigerian (42%) and Indian students (20%) are more likely to fund their rent by working part-time.

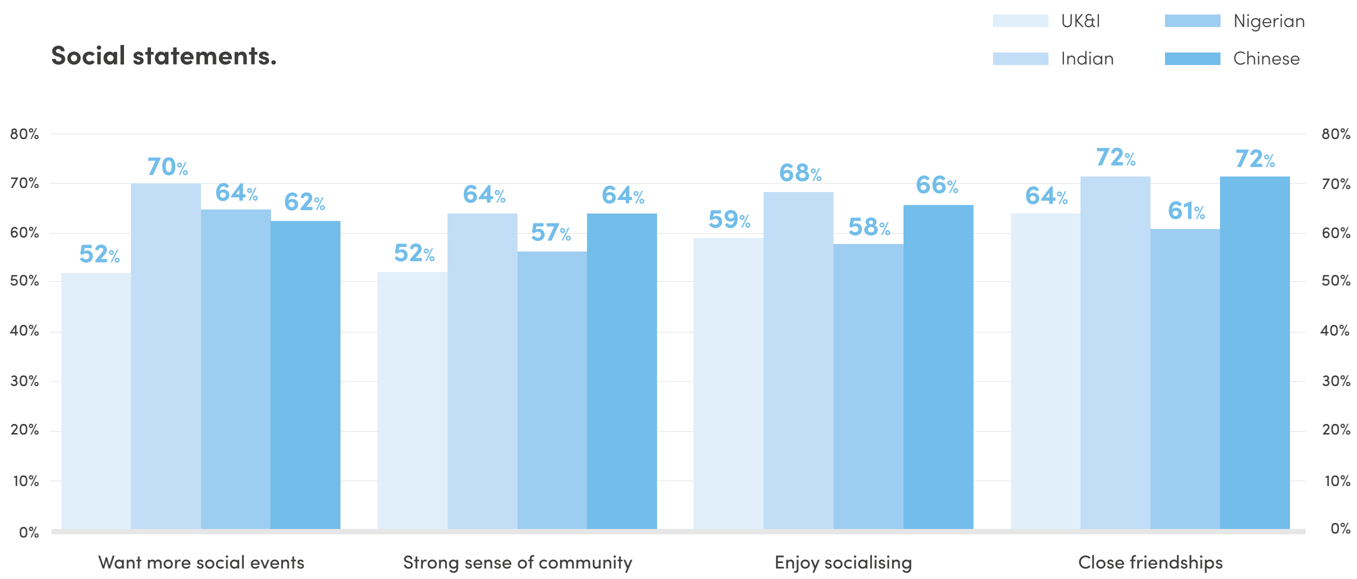
Chinese students are significantly more likely to say they are struggling with gaining the right skills rather than finding part-time work. This may be because Chinese students are far less likely to be funding their rent through part-time work than others. Other sector research suggests that this may change in future, as opportunities to work while studying and post study work-rights are growing in importance to Chinese students when choosing their study destination.[13]

Chinese and Indian students are faring better socially than those from Nigeria and the UK and Ireland.

In previous years, international students were far less likely than UK students to say they had formed close friendships with those in their accommodation or report a sense of community. However, this situation has shifted significantly.

13. Doshi, J., South Asia and Greater China: What matters to students & which destinations are winning?, Navitas, (10 January, 2023)

Social statements.



In fact, Chinese and Indian students are now significantly more likely to report that they feel a strong sense of community, that they have formed close friendships and enjoy socialising in their accommodation than those from the UK and Ireland and Nigerian students. It is possible that because the Chinese and Indian student cohorts are much larger than the Nigerian cohort, there is more of a 'critical mass' of these students in their accommodation, meaning that there are ready-made social networks of students from their home country to draw on. However, it's not clear why this shouldn't also be the case with domestic students – are expectations a factor?

One further piece of evidence supports the hypothesis that achieving a 'critical mass' for international students is important. This comes from the analysis of ratings for buildings of different size. Although mid-sized buildings of 300 – 600 beds generally score best for student satisfaction, Nigerian students consistently rank larger buildings (600+ beds) better on key social metrics including forming close friendships and enjoying socialising in the accommodation. They are much more likely to report a strong sense of community in large buildings (64%) than in mid-sized (56%) or small buildings (52%).

Gaining further insight into the reasons why Chinese and Indian students are faring better socially than those from Nigeria and the UK and Ireland will be important to ensure that residential life programming meets the needs of all students.

With more international students wanting to live alone, do social events and communal spaces really matter?

The short answer is yes. They matter a lot! When searching for accommodation, all international groups are twice as likely as those from the UK to prioritise living alone. However, this appears to be linked to a desire for privacy, rather than a lack of interest in connecting with others.

Communal spaces and opportunities to socialise are both important for all students when searching for accommodation, although more so for those from Nigeria and India than those from China and the UK. Communal spaces are also an area that approximately 1 in 10 students from India, Nigeria and the UK and Ireland, would pay more to improve. Similarly, when it comes to opportunities to socialise, it is of note that, although affordability issues are more of a concern, 15% of Nigerian students and 11% of Indian students say they would pay more for improved social events.

15% of Nigerian students and 11% of Indian students say they would pay more for improved social events.

1 in 10

of all students would pay more for improved communal spaces.

Each of our focus international cohorts is significantly more likely than students from the UK and Ireland, and the broader international student cohort, to say that they want more social events, although students from China are much less likely than those from India and Nigeria to say they would pay more to improve them. Social events are also the area where nearly all international cohorts, but particularly those from Nigeria, rank management the lowest.

The reasons behind the desire for more and improved social events and opportunities are unclear. It is possible that international students are connecting with others from the same country, and the desire for more social events may reflect a desire to connect with students from more diverse backgrounds, or it may be that current events are just generally not meeting expectations or are viewed as culturally inappropriate. What type of social events are our focus cohorts seeking? How are current events falling short? Are students seeking opportunities to socialise more with those from the same country? Or with the broader student population? Answering these questions and unpacking this issue further should be a priority moving forward.

Continued overleaf...

Free-text answers from students provide some insight into what students hope to see in terms of improved social events and suggest that our international focus groups hope for more events that incorporate food, music and traditions from all cultures. There is a definite sense that international students see social events as facilitating a two-way cultural exchange, however, there is also a desire to connect with those from the same country:

> *More activities about food share.*
> ~ Chinese student

> *There should be events arranged for people with different nationalities so there is a good cultural exchange and no one feels left out.*
> ~ Indian student

> *Nigerian party*
> ~ Nigerian student

> *The apartment can host more parties. The quickest way to hold a party is by country, and people from the same country might get to know each other more quickly. The apartment can also organize more entertainment programs in the common areas to enhance the neighbourhood.*
> ~ Chinese student

> *By organising social events in terms of music, culture, food etc as we have people from different countries staying in the accommodation.*
> ~ Nigerian student

> *Frequent weekend games (quizzes, board games, Play Station competition, etc.) within the organization.*
> ~ Nigerian student

> *Social activities such as sporting events could help to improve social activities in the accommodation.*
> ~ Nigerian student

Some students, particularly those from Nigeria, hope to see more games or competitive type social events:

> *I think we can play board games together, we can quickly get familiar with each other, and the relationship becomes better.*
> ~ Chinese student

Chinese students

At a glance...

Room type:	Studio 54%	Private bedroom 42%	Shared bedroom 5%
Rent is funded by:	Parents 91%	Savings 10%	Scholarships 3%
	Part-time work 3%	Student loans 1%	

The accommodation search.

Search resources.

Chinese students are more likely to use social media, education agents, and recommendations from others. They are less likely to use university websites and general web searches than other groups.

Top search criteria:

75% Travel time to study

73% Condition and quality

62% Bedroom

61% Budget

69% Safety and security

Search priorities.

Chinese students have similar priorities to other students, although the bedroom is more of a concern and budget less a concern than for other groups. Chinese students are much more likely than other groups to prioritise living alone or living with their friends. Kitchen size and facilities, technology/Wi-Fi and range and quality of amenities also rank highly.

Booking and moving in.

Chinese students are more likely to book via an education agent or a letting agency, and far less likely to book with a university housing office than other students.

During the moving-in experience, Chinese students are most satisfied with the staff welcome, ease of finding accommodation and arrival instructions, and least satisfied with cleanliness, parking, and the welcome from other students. The latter three are so important that these influence whether a Chinese student is likely to be an NPS Detractor or Promoter.

The accommodation experience.

Satisfaction.

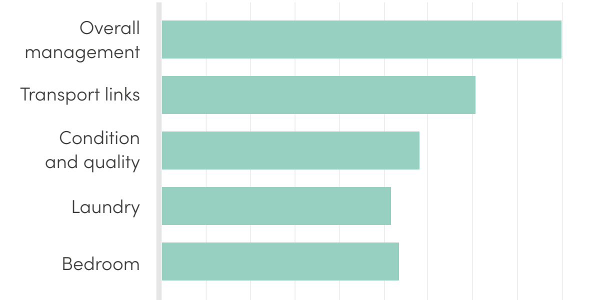
NPS	
	46% Promoters
	35% Passives
	20% Detractors

Value for money is the key driver of overall satisfaction for Chinese students yet 73% are neutral on this subject. Perceptions of overall management and transport links have the biggest influence on whether accommodation is viewed as value for money.

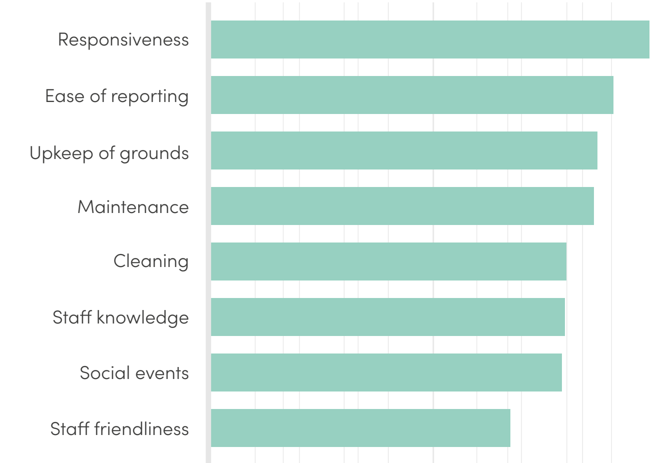
Overall drivers of satisfaction:

1. Value for money
2. Condition and quality
3. Overall management
4. Bedroom
5. Student care and support
6. Design
7. Communication
8. Bathroom facilities

Drivers of value for money perceptions:



Drivers of satisfaction with management:



Perceptions of management.

Responsiveness of staff, ease of reporting issues and maintenance have the biggest influence on whether Chinese students are satisfied with management, and their importance should not be underestimated. When compared to Chinese students who are NPS Promoters,

Detractors are:

- **14 times more likely to say that responsiveness could be better;**
- **12 times more likely to say that ease of reporting issues to management could be better; and**
- **16 times more likely to say maintenance could be better.**

Facilities.

Chinese students are less likely to say they want to improve features for increased rent and much more likely to say that they are content with the balance of price and amenities. This is most likely to be because a higher number live in studio apartments. Bathroom (13%), kitchen size (11%), and laundry (8%) are the facilities that Chinese students would be most likely to pay more to improve, although this is to a lesser extent than other students. When it comes to their bedroom, the design and bedroom size have the greatest influence on satisfaction. Detractors also report availability of communal spaces, bedroom, condition and quality, and range and quality of amenities, as much worse than expected.

Supporting Chinese students.

Keeping students updated.

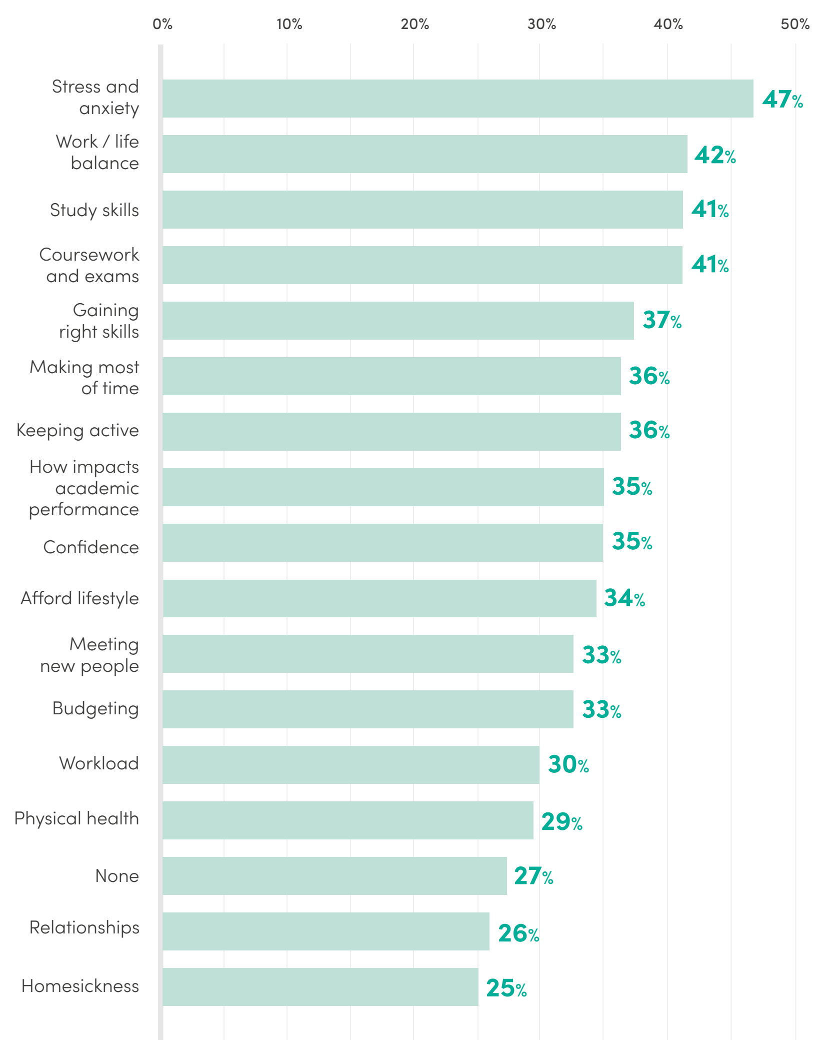
Although Chinese students are significantly less likely to use email than other groups (63%) this is still the major source of accommodation information.

Social media is also a major source of information (44%) followed by room-mates (27%) and Notices/Posters (24%). More than half of those Chinese students who engage with their accommodation community via social media do so via WeChat. Instagram is also popular. Facebook and WhatsApp are used, but to a lesser extent. Just over one third do not engage via social media at all.

Wellbeing.

Chinese students are most likely to say they struggle with issues connected with academic performance (coursework and exams, gaining the right skills, study skills, and understanding how to improve academic performance). They are also more likely than others to say they suffer with their physical health and where to find support if they do need it. While Chinese students report lower levels of mental health-related struggles than other students, those who are Detractors report significantly higher levels of depression and loneliness, highlighting the importance of ensuring all students know how to get the support they need, and that support is culturally appropriate.

Top struggles for Chinese students:



Indian students

At a glance...

Room type: Studio **21%** | Private bedroom **76%** | Shared bedroom **3%**

Rent is funded by: Parents **60%** | Student loans **29%** | Savings **22%** | Part-time work **20%** | Full-time work **2%**

79% more likely to be postgraduate students, than the total international cohort. **49%**

The accommodation search.

Search resources.

Indian students are more likely to use university websites and general web information in their search than students from China and Nigeria. Social media, online reviews and student listing sites are also important. Indian students also seek support from educational consultants/agents during the search process.

Search priorities.

Kitchen size and facilities, bedroom, and availability of communal spaces matter more to Indian students when looking for a place to live than those from China or Nigeria.

Booking and moving in.

Indian students are most likely to have booked with a letting agency or the university housing or accommodation office, followed by direct with a private halls provider or via an educational consultant/agent. Indian students who are NPS Detractors rate parking, welcome from other students, cleanliness, and welcome from staff, as the most negative aspects of the moving in experience.

The accommodation experience.

Satisfaction.

NPS

44% Promoters
36% Passives
20% Detractors

Value for money is a key driver of satisfaction, yet 65% are neutral on this subject, and NPS Detractors are three times more likely to say value for money was worse than expected. This represents a significant opportunity to improve performance.

Top search criteria:

80% Travel time to study

75% Condition and quality

77% Safety and security

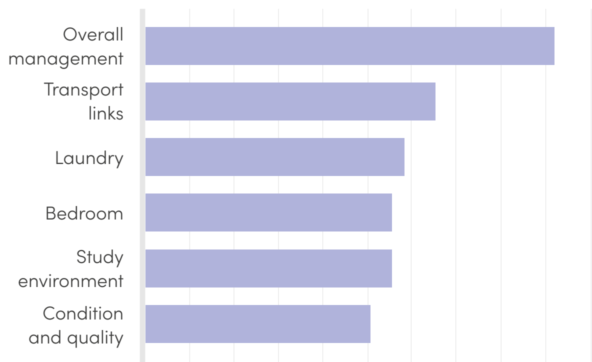
70% En-suite

73% Budget

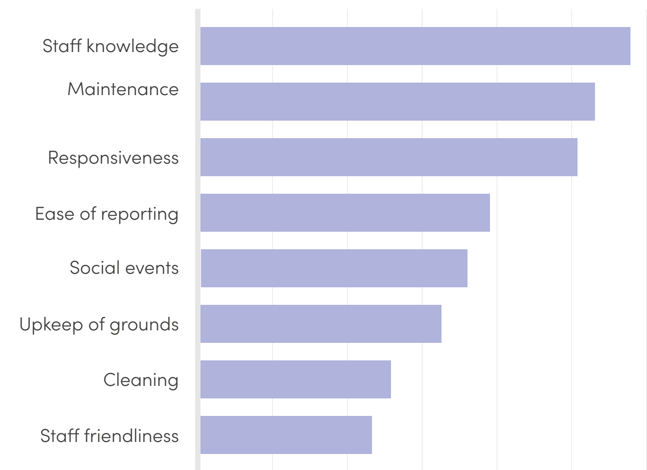
Overall drivers of satisfaction:

1. Value for money
2. Condition and quality
3. Overall management
4. Bedroom
5. Bathroom facilities
6. Design
7. Communication
8. Student care and support

Drivers of value for money perceptions:



Drivers of satisfaction with management:



Perceptions of management.

Staff knowledge, maintenance/repairs and responsiveness are the most important aspects of management for Indian students and knowledge and responsiveness are rated fairly well, even by those who are Detractors. Aspects of management that students who are NPS Detractors rank more negatively are social events and activities, maintenance, cleaning, and ease of reporting issues to management.

Facilities.

Bathroom facilities, kitchen size, catering and laundry are the three things that Indian students are most likely to want to trade up for, and strongly influence whether an Indian student is likely to be a Promoter or Detractor. When compared to Indian students who are NPS Promoters,

Detractors are:

- **5 times more likely to say that bathroom facilities are worse than expected.**
- **6 times more likely to say that kitchen size is worse than expected; and**
- **3 times more likely to say that laundry is worse than expected.**

Detractors also report availability of communal spaces, bedroom, condition and quality, and range and quality of amenities, as much worse than expected.

Supporting Indian students.

Keeping students updated.

Emails from the accommodation team (77%), social media (40%) and posters and notices around the accommodation (29%) are the major sources of information for accommodation updates. Two thirds of Indian students who engage with their accommodation community via social media use Instagram. WhatsApp and Facebook are also used. One in four do not engage via social media at all.

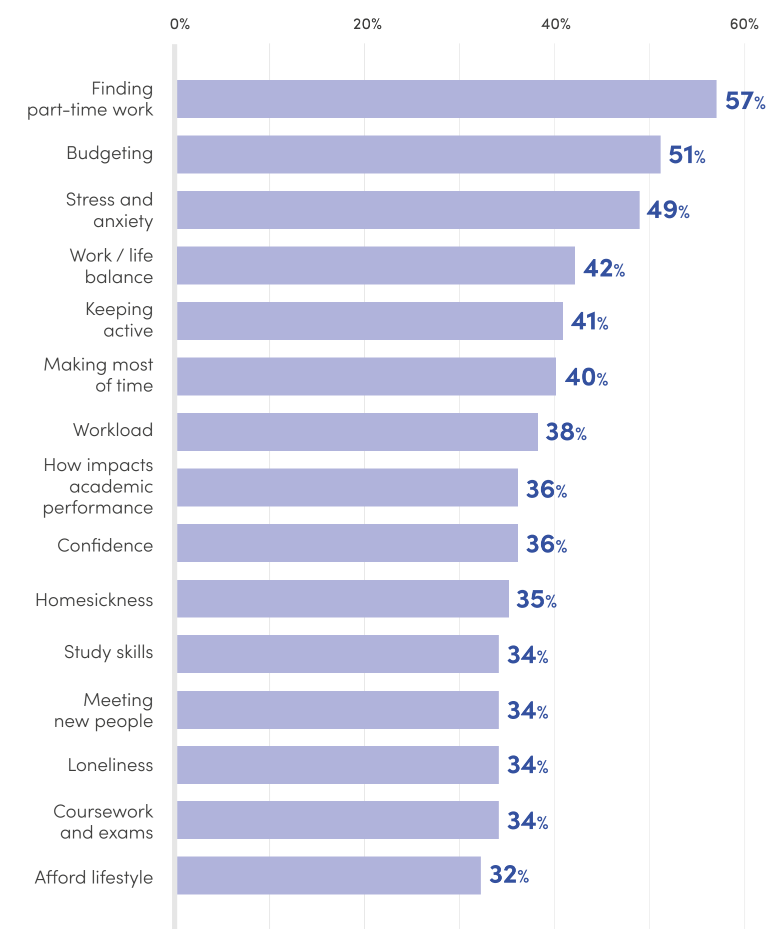
Community and socialising.

Indian students are more likely than students from the UK and all international students to say they have formed close friendships, enjoy socialising, and that they feel a strong sense of community in their accommodation. For Indian students who are NPS Detractors, it is clear that conflict has played a role – 16% report that besides generally get on well with others, there is some conflict. This is higher than for other groups. Social events are very important for Indian students. They are a key driver of satisfaction with management, and Indian students are also significantly more likely to say that they want more social events than other cohorts. Seven out of ten Indian students say they want more events, and 15% of Indian students who are Detractors would pay more for improved social events. Taking the time to understand why social events and activities are not meeting the expectations of Indian students is likely to pay dividends.

Wellbeing.

Finding part-time work is the most significant struggle faced by Indian students (57%), followed by budgeting, and stress and anxiety. This is likely due to the higher number of Indian students who fund their rent by working part-time, and the fact that nearly 30% of Indian students have debt from a student loan. Only 33% of Indian students say they have access to information about financial assistance. Indian students who are NPS Detractors are more likely to say they suffered from depression, loneliness and struggling to meet new people than those who are Promoters.

Top struggles for Indian students:



Nigerian students

At a glance...

Room type: Studio **26%** | Private bedroom **69%** | Shared bedroom **5%**

Rent is funded by: Parents **47%** | Part-time work **42%** | Savings **41%** | Student loans **6%** | Full-time work **3%**

68% more likely to be postgraduate students, than the total international cohort **49%**

The accommodation search.

Search resources.

Nigerian students are most likely to use university websites in their search, followed by general web searches. They are more likely than other groups to use online reviews and recommendations.

Top search criteria:

89% Travel time to study

76% Condition and quality

74% Safety and security

70% En-suite

67% Budget

Booking and moving in.

Nigerian students are most likely to book directly with the university accommodation office or halls provider or via a letting agency. A small number book via an educational consultant or agent.

Parking and cleanliness are the two most negatively rated aspects of moving-in for Nigerian students who are NPS Detractors. Welcome from staff and students are also rated negatively by Detractors, although to a much lesser extent.

The accommodation experience.

Satisfaction.

NPS:
- **45% Promoters**
- **37% Passives**
- **18% Petractors**

Value for money is the key driver of overall satisfaction. Overall management plays a major role for Nigerian students as this impacts their overall satisfaction as well as their perceptions of value for money. Communication is a key driver of value for money for students from Nigeria. NPS Promoters are almost five times as likely to say that communication was very good than those that are Detractors.

Perceptions of management.

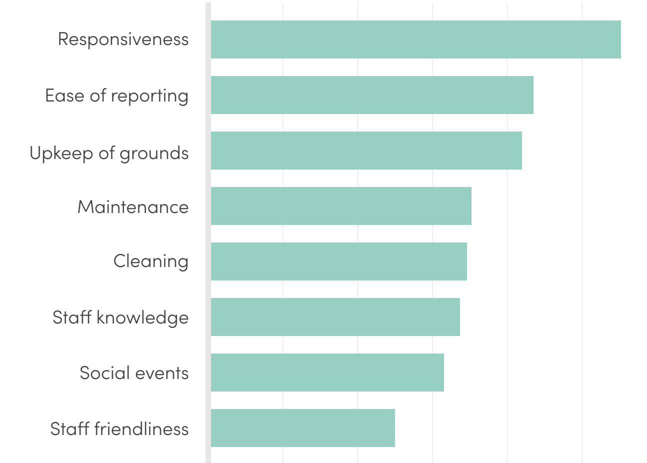
Nigerian students are more likely to say overall management is good or very good than other internationals. However, NPS Detractors are twice as likely as Promoters to feel neutral about management, and twice as likely to rate it negatively. Unlike other groups, maintenance and upkeep of grounds play a major role in Nigerian students' perception of management. Nigerian students who are NPS Detractors rate social events, cleaning and maintenance most negatively.

Overall drivers of satisfaction:

1. Value for money
2. Condition and quality
3. Bedroom
4. Overall management
5. Bathroom facilities
6. Communal spaces
7. Kitchen size

Drivers of value for money perceptions:

Drivers of satisfaction with management:



Facilities.

Bedroom space, range and quality of amenities, availability of communal spaces and design are all things that some Nigerian students would pay more rent to improve. Improved communal spaces are so important that they are a key driver of overall satisfaction for Nigerian students. Sports facilities is one area where Nigerian students are much less likely to be satisfied than other student groups.

When compared to Nigerian students who are NPS Promoters;

Detractors are:

- **3 times more likely to rate bathroom facilities negatively.**
- **14 times more likely to rate cycle storage negatively; and**
- **Nearly twice as likely to rate kitchen size and facilities negatively.**

Satisfaction with laundry and parking also influence whether a Nigerian student is likely to be a Detractor or a Promoter.

Supporting Nigerian students.

Keeping students updated.

Nigerian students are most likely to find out about accommodation updates via email (81%), posters and notices around the accommodation (30%) and talking to reception (24%). They are less likely to say they receive updates via social media (19%) than other international students (34%). Nigerian students engage with their accommodation community via Instagram, WhatsApp and Facebook. Almost six out of ten Nigerian students do not engage with their community via social media at all.

Sense of community and socialising.

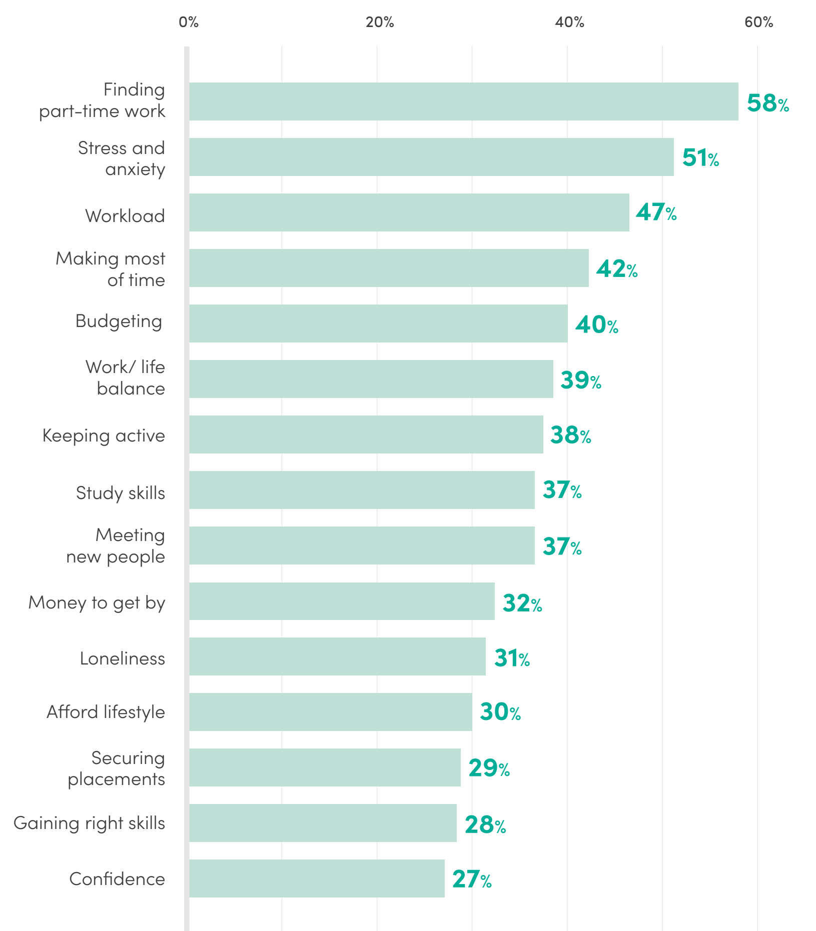
Nigerian students are less likely than others to say social events in their accommodation are good or very good, and much more likely to say they want more social events than other internationals and students from the UK.

Nigerian students also score lower than other international students across almost every social statement - 61% say they have formed close friendships (vs 63% of all international students), and they are much less likely to say they enjoy socialising in their accommodation (58%) than Indian (68%) or Chinese students (66%). NPS Detractors are 18 times more likely than Promoters to say that opportunities for socialising are bad or very bad.

Wellbeing.

Finding part-time work is the greatest struggle faced by Nigerian students (58%), followed by stress and anxiety (51%). However, there are a number of areas where there are significant differences between the extent that NPS Detractors and NPS Promoters struggle with particular issues. These include depression (22% Detractors vs 10% Promoters); loneliness (41% vs 28%); and money to get by (36% vs 29%).

Top struggles for Nigerian students:



Meeting future needs.

The overall picture emerging from the GSL Index 2023 Q2 data is a positive one, and it is encouraging to see the gap between university and private halls closing.

However, although satisfaction is improving, students have increasingly high expectations. This highlights that a focus on those aspects of the accommodation experience related to customer service will be required if providers are to transform students who are NPS Detractors, or Passives into Promoters of their accommodation. It is clear that setting service standards for maintenance and monitoring performance and student satisfaction will be key to this.

Global student mobility continues to rise and the UK and Ireland are both positioned well internationally to benefit from this. However, there are 2 important reasons to avoid complacency with respect to the flows of international students:

— **Data suggests that the mix of internationals is changing and will continue to change.** Chinese students will remain an important market, but other sending countries are gaining prominence and there will be challenges in addressing the needs of and even more diverse profile of international students.

— **The growing cohorts (India, Nigeria and others) tend to be significantly more price sensitive.** They are also much more dependent on casual work to supplement their studies, and these markets are particularly vulnerable to changes in government policy on family visas and post-study working rights, both of which are now under attack.

In the same way that we can confidently assert that there is "no such thing as an international student", there really is no such thing as a UK or Irish market when it comes to student accommodation – only multiple local markets dependent on the strategy and success of local institutions. However great the importance of accommodation to the decision-making of students, it will always be a 'secondary' purchase.

We can confidently assert that there is "no such thing as an international student".

Consequently, the most important recommendations of this report are to understand the institution's domestic and international recruitment strategies and their likely implications, maintain a diverse accommodation stock, and develop the agility to be able to respond and adapt service delivery to the student mix as it becomes more dynamic.

In addition to this overarching point, we make the following recommendations:

1.
Ensure that senior colleagues within institutions are fully aware of the increasing importance of the right accommodation mix to the successful recruitment of students, particularly as the demographics of international recruitment evolves.

2.
Map out your own institution's target recruitment profile and use data such as that from the GSL Index to project how this is likely to impact, in particular:
— The demand for different types of accommodation
— The future premium that may realistically be achieved for studios (especially if these are a second choice)
— The adaptation and reprioritisation of aspects of your accommodation 'experience' to the future student profile
— The need for student support services, help and advice around particular specific issues which will come to be more prominent in the future.

3.
There can be a tendency for student care & support and communication efforts to dwindle as the move-in phase passes and the academic year progresses. Resist this tendency and instead develop an approach that opens a range of comms channels and builds as the year progresses so that students feel they have the support they need into the summer term.

4.
In the ongoing drive to improve service standards, do not dismiss the importance of overall quality of accommodation stock. While condition and quality of accommodation has improved over the years, expectations are rising too, and students have become accustomed to a certain standard of living. The condition and quality of accommodation drives overall perceptions of value for money and overall performance and thus need to be an ongoing focus. This is particularly true for universities as this is where university halls lag behind private halls.

5.
Students continue to show willingness to invest in quality accommodation, but day-to-day financial stresses are growing. Laundry is one area that can have a big impact on how students feel about the value-for-money of their whole experience so it's important to get this right.

6.

Use the new GSL Index Score to get a more accurate view of the relative performance of your accommodation portfolio, and use the Operational Delta scores to identify and reward strong performance, even in older buildings.

7.

While wellbeing scores are generally up this year, a significant minority (21% in university halls, 15% in private) say their accommodation has had a negative impact on their wellbeing. Set aside time to the specific needs and experiences of this struggling group. They need your help.

8.

Employment and skills-related issues are major stressors for students, especially those from India and Nigeria. Finding part-time work is increasingly a struggle for students and is particularly important to these international cohorts. Improved support, including pre-departure advice, and better signposting of available support is likely to be highly beneficial. Consider ways you can better connect local casual employers (as well as long-term employers) to your talent pool of residents.

9.

When international students find a 'critical mass' of other students like them, it appears to have a strong positive effect. Given the increasing diversity of international markets from which the UK will be recruiting, consider what pro-active interventions could be put in place to replicate this effect for smaller international groups.

10.

The importance of shared facilities such as kitchens and communal spaces varies considerably between nationalities, but also between individuals. Consider how to develop more targeted or customized messaging (for example, mapping online behaviours to the structure of physical tours) to focus on the most important selling points for individuals.

11.

A shift in the balance of international students away from Chinese and towards Indian and Nigerian students would drive up the importance of communal spaces and shared facilities so it's a good idea to plan ahead for any additional investment required in these areas.

12.

International students all value more flexible contract structures, even if the flexibility is never invoked. It may well be worth exploring what options can be offered to reassure students, reduce anxiety and secure more bookings in competitive local markets.

13.

The ideal marketing and communications strategy would be fed by data gathered from pre-booking online behaviours, supplemented with individual stated preferences and then fine tuned by experience of individuals on the ground. In the absence of this, and understanding that 'international students' are not one thing, tailoring communication to nationality based on profiles such as those presented in this report is a reasonable halfway house and will be significantly more effective than a one-size-fits-all approach.

14.

The overall impact and importance of the moving-in experience on students is well documented. However, the analysis in this report shows specifically that cleanliness issues on moving in are particularly significant for some international cohorts and have a lasting effect on their perception of their treatment. Be sure to invest in getting this right.

15.

There are indications that some international students may be less inclined to engage in support framed around 'mental health and wellbeing' despite having significant struggles. Specific targeted support, particularly around homesickness, managing workload, budgeting and finding part-time work, may cut through to these groups more effectively. Working with international students to gain insight into how to best promote these is likely to be beneficial.

16.

Responsiveness in the management of issues when they arise, is a major influencer of overall satisfaction, particularly for Chinese students, so this may need to be a focus area for optimisation in some sites.

17.

Where there are significant cohorts of Indian and Nigerian students, extra emphasis should be placed on a larger number of appropriate social events, and on minimising any conflict with other residents, both of which are particularly important to these cohorts. Prioritise the need to gain further insight into issues around social events for these groups. Understanding why social events fall short of expectations and adjusting provision accordingly will improve the student experience and overall perceptions of management.

18.

Share this report and its evidence with accommodation colleagues at all levels – help them grow their cultural competence and challenge them to generate solutions based on their own experiences working closely with their residents.

The GSL Index data highlights that there are distinct differences between our focus international groups when it comes to their priorities, the things that drive satisfaction, and how they perceive value for money and overall management. Understanding this, and how it aligns to future institutional recruitment, will be vital to successful planning, and improving performance.

We hope that this report will serve as a useful resource for colleagues within the student accommodation sector, and these insights will help to improve practices and policies aimed at ensuring a high-quality accommodation experience for all students.

As the Index continues to grow, not just in the UK and Ireland, but globally, we look forward to continuing to work with our university and purpose-built student accommodation partners to monitor performance, share best practice and identify opportunities for improvement.

Get Involved

Throughout the year, the GSL Index surveys hundreds of thousands of students across four continents and in 15 different languages, on all aspects of their student accommodation experience.

The Index brings together a range of standardised local, regional and global KPIs, alongside bespoke insights from custom questions developed to meet specific needs of accommodation providers.