



National Student
Housing Survey

National Student Housing Survey

Executive Summary 2014

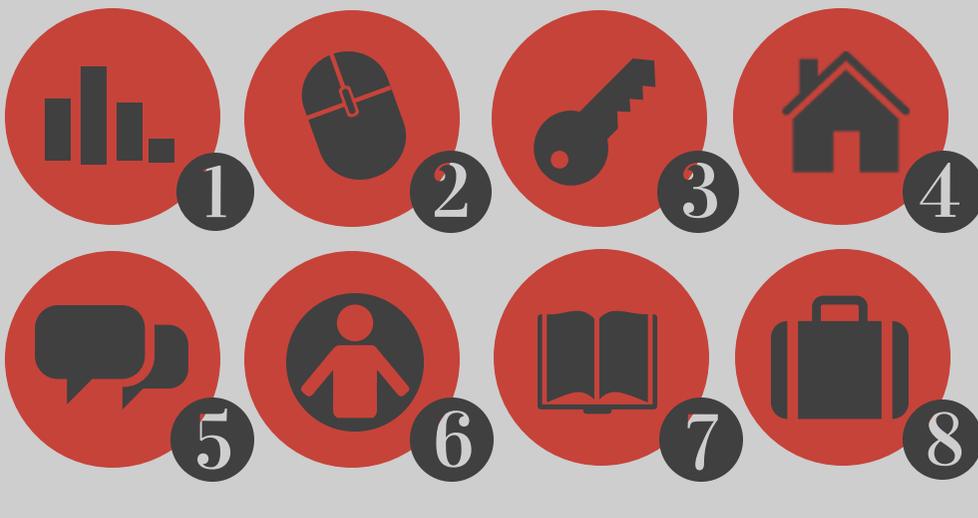
19,000 responses

Over 200 Institutions



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Question Areas:



- 1 KPIs
- 2 Finding accom
- 3 Moving in / rent
- 4 Features
- 5 Design / Comm
- 6 Social / Env
- 7 Learning Env
- 8 Moving on

£9,000
Generation



A re-cap on 2013...



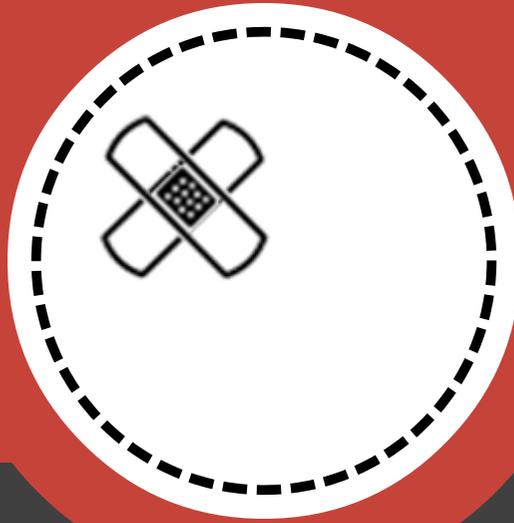
Significant
drop in overall
satisfaction
levels

But individual
ratings were
higher than in
2012

Increase in
student
expectations?

2013 also saw a dramatic reduction in the social
nature of student accommodation.

What's the story in 2014?



Slight recovery in satisfaction scores for uni halls

Strong bounce-back in satisfaction scores for private halls

Recovery in expectations



70%

As good or better across all aspects



TRAVEL TIMES



SAFETY/SECURITY



Exceed Expectations



Increase in perceptions

of value for money:

Better than expected for more than one in four

Private Halls are most likely to exceed expectations

Private rentals are the most likely to disappoint



1

Quality linked to age of stock.

Private Halls top for condition / quality

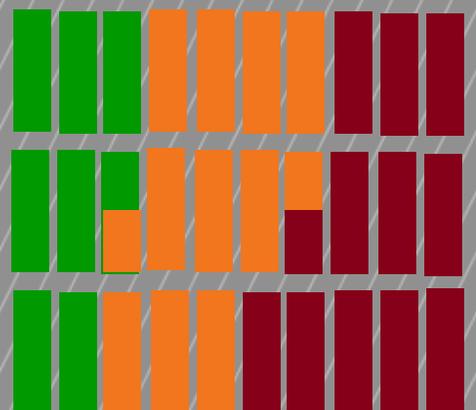
(Top selection factor)



Private Halls

University Halls

Private rentals



■ Promoters ■ Passives ■ Detractors

Digging deep...



Over 70% expressed a willingness to increase their rent for higher quality accommodation.



High-speed
WIFI

27%



Trade-ups
Students will pay more for...



Larger
kitchen

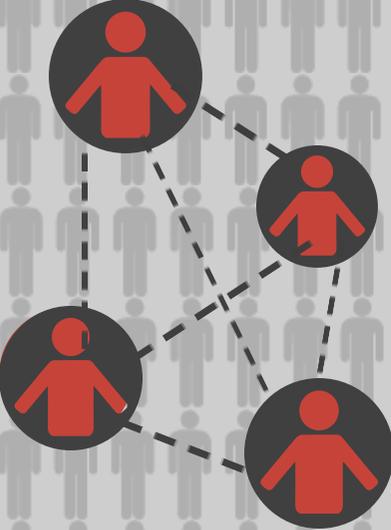
25%



Reduced
noise

22%

2013's social shift is here to stay



Less than 50% believe there is a strong sense of community in their halls

One in five actively dislike socialising within their private hall

Loss of social cohesion may lead to an increase in issues relating to isolation, stress and depression in the future.



The flip-side...

Decrease in complaints:



Noise levels



Anti-social behaviour

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