

STUDENT LIVING MONITOR



European Research Report 2023

A pan-European survey measuring the impact of students' living environment on their well-being and happiness

In collaboration with:

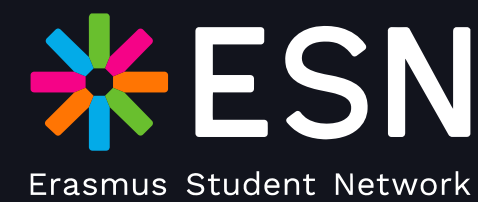
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Foreword



Frank Uffen
Co-Founder,
The Class Foundation

This survey demonstrates the unique role of accommodation environments in student mental health and well-being. Therefore, accommodation providers should design places that facilitate community, a sense of togetherness, and belonging, and accommodation teams should facilitate a sense of community. Taken together, cultivating environments and communities that are supportive of mental health and well-being is crucial in higher education housing.



Kelly-anne Watson
Managing Director,
The Class Foundation

With the Student Living Monitor, we aim to identify the fundamental components that impact the quality of student life, such as access to certain facilities, services, and amenities in their living environment. Through this pursuit, we aim to uncover the challenges that result in poor well-being and lower levels of happiness among students. With the statistical evidence gathered from the research, our ambition is to enhance student happiness, experience and elevate social impact.



Erasmus Student Network
SLM Research Partner

Erasmus Student Network (ESN) is a non-profit international student organisation. Their mission is to represent international students, thus providing opportunities for cultural understanding and self-development under the principle of Students Helping Students. They are present in more than 1000 Higher Education Institutions from over 40 countries. ESN involves around 40,000 young people offering its services to around 350,000 international students every year.

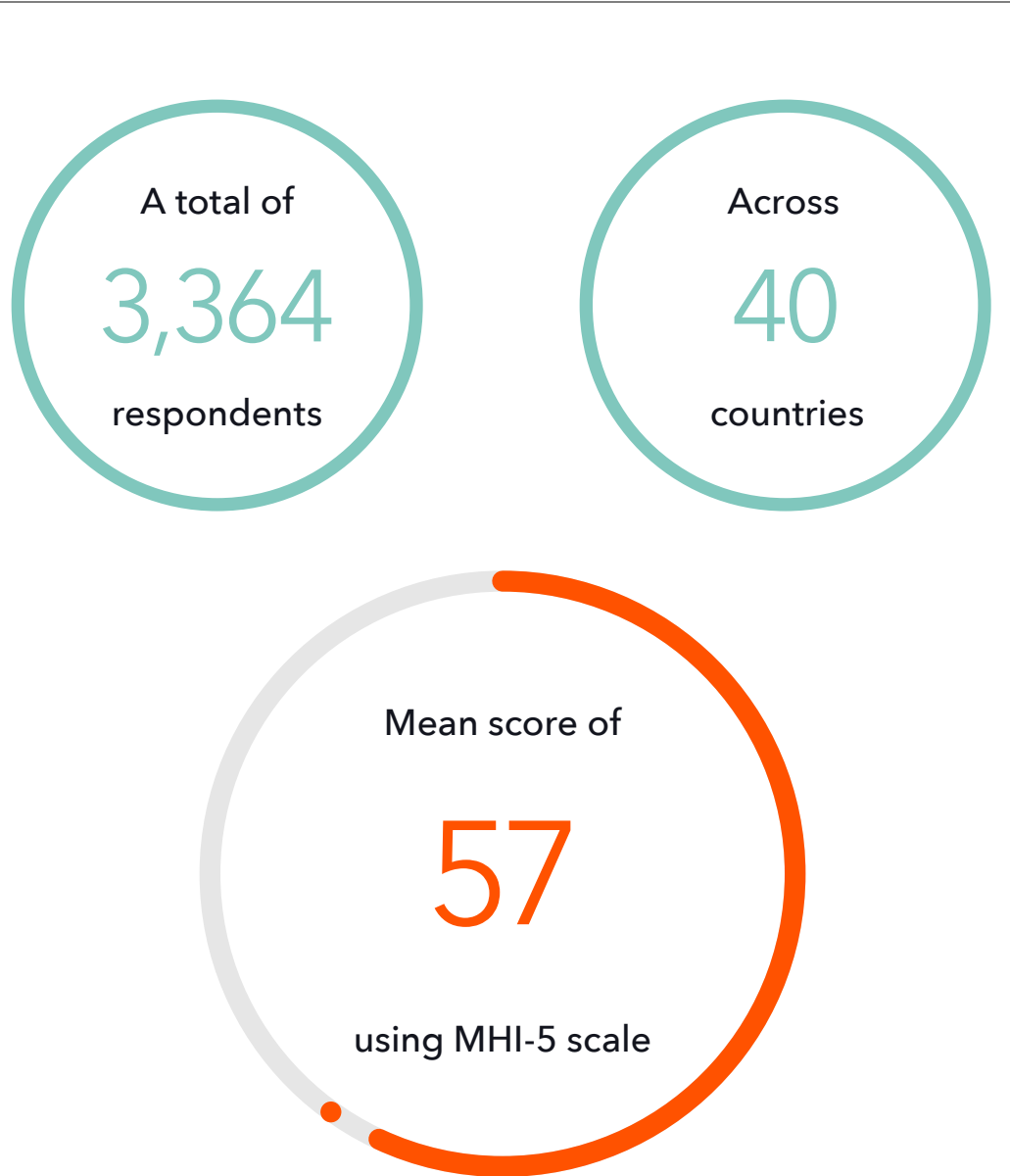
Every year, thousands of students embark on the journey of discovery through participation in mobility. Mobile learners have the chance to immerse themselves in new cultures, navigate unfamiliar education systems, and develop the skills necessary to confront challenges. Unfortunately, finding accommodation at the hosting destination has continuously become one of the biggest challenges international students face upon their arrival. In the search for better mobility, the Erasmus Student Network is committed to supporting international students' mobility, especially in pressing topics such as finding timely and appropriate accommodation.

Therefore, introducing initiatives such as the Student Living Monitor serves as a comprehensive mechanism for understanding the multifaceted problems confronting students' living conditions. We thank the Class Foundation for the collaboration in creating a pathway to support mobile learners and for partnering up with us for the future of mobility.

Executive Summary

The Student Living Monitor (SLM) is the only survey dedicated to understanding students’ happiness and the influence that the housing situation of students has on their well-being. This is the first year that the survey has been run across Europe, and we thank those organisations that reached out to their students to take part.

In total, **3,364 respondents** in **40 European countries** recorded a **mean mental health score** (using MHI-5 0-100 scale) **of 57**, compared to the MHI-5 benchmark score of 60. This indicates that the survey’s respondents have scores at the lower end of the spectrum of good mental health. The participation of these students has meant that we have started to gather an evidence base that will help to shape the future of the student residential sector. Thank you to all the students who took part, and the valuable insight that this has given us all.



Key Findings

We all know that someone’s living environment can have a significant impact upon their sense of happiness and well-being. The services and facilities that are provided to student communities are an integral part of the experience. The SLM results help us to see what measures of support have the most beneficial impact on student well-being.

Common Challenges

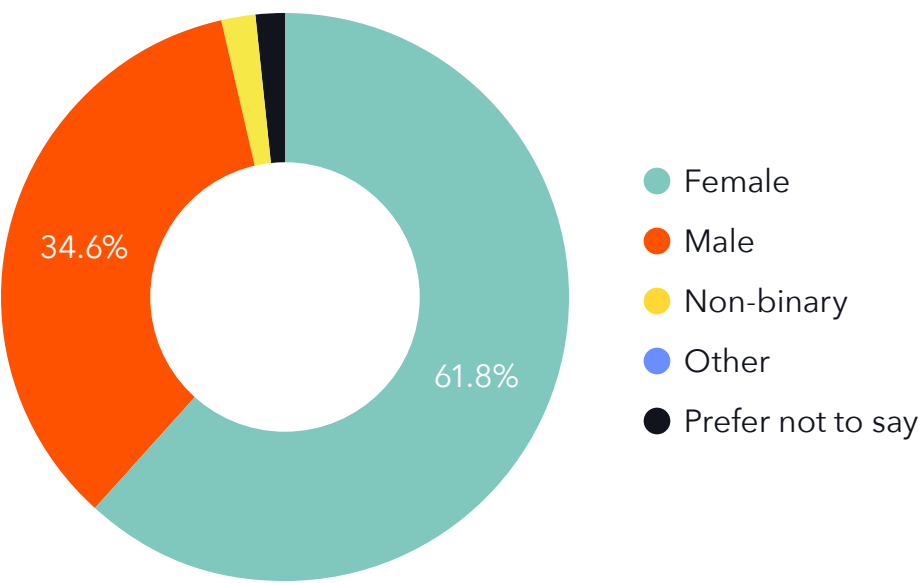
- Feeling lonely
- Feeling bullied or discriminated against
- Having fewer choices of where/how to live
- Did not get their first choice of accommodation
- Having financial worries
- Unaware of where to turn to for support

Key factors that improve well-being

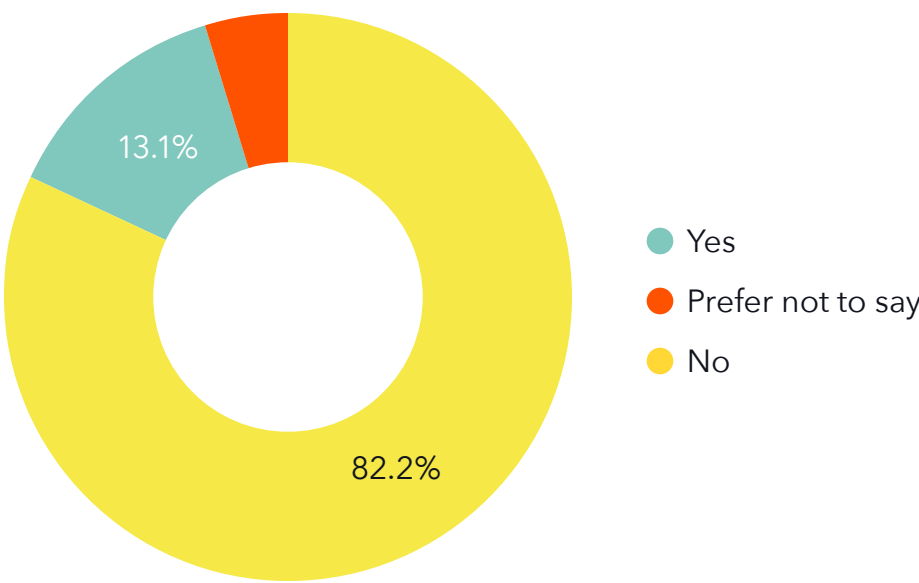
- Community events led by organisation and/or peers
- Clear and easy access to career/job support
- Clear and easy access to professional mental health services
- Access to social and health facilities
- Services and support around finances

Respondents

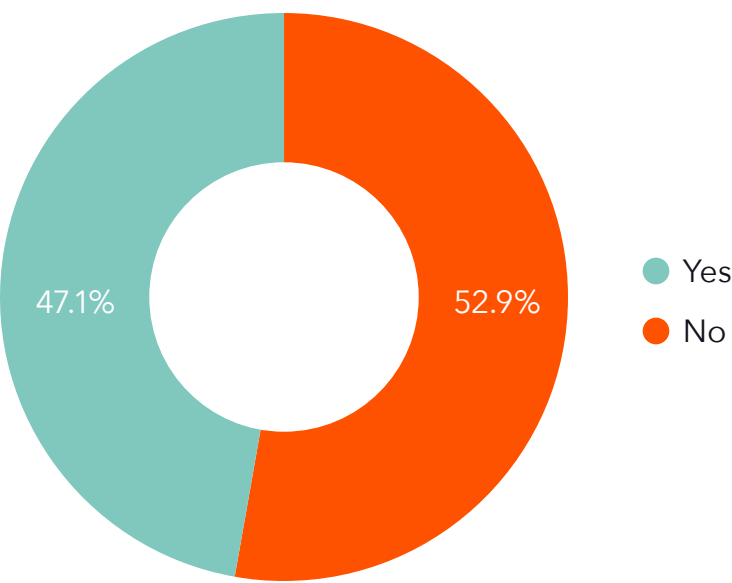
Respondents by **gender**



Respondents by **disability**



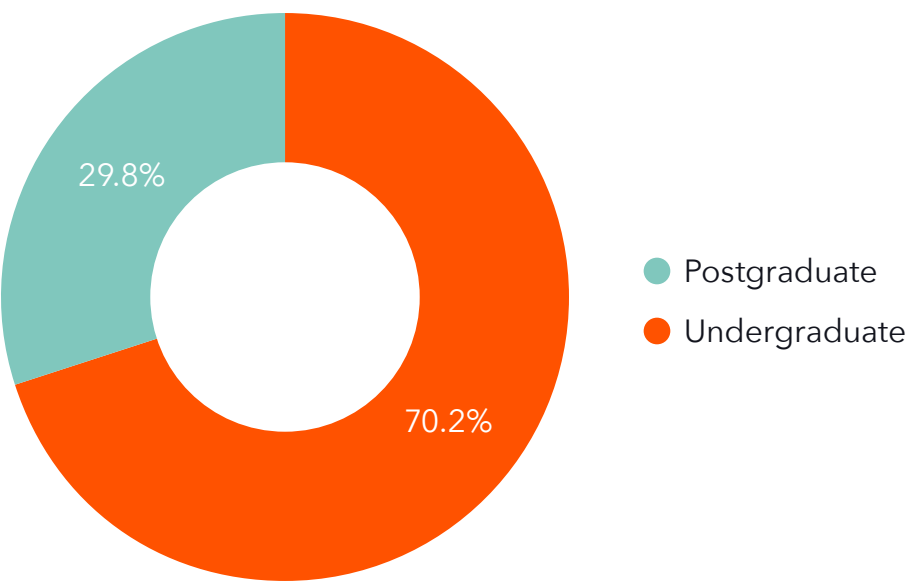
Respondents by **international status**



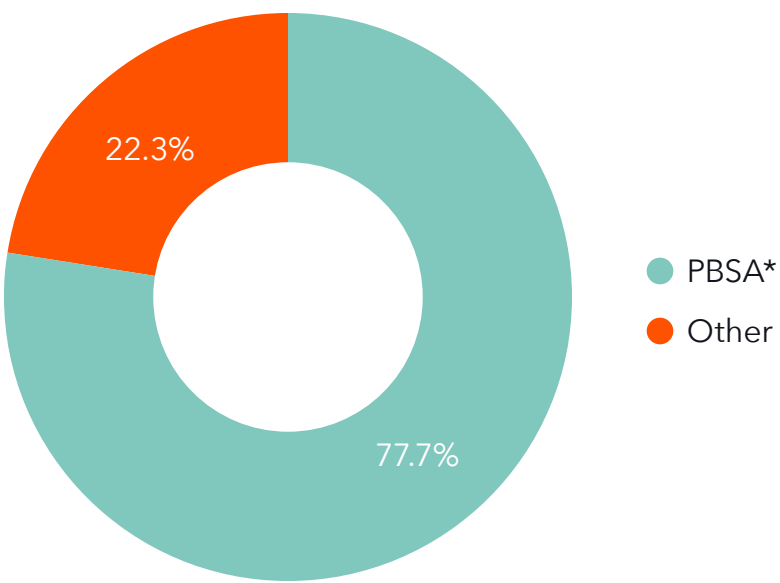
Respondents by **country of study**

Denmark	567
Iceland	323
Spain	297
Austria	282
France	265
United Kingdom	258
Belgium	235
Italy	234
Netherlands	183
Germany	165
Portugal	158
Other	397
Total	3,364

Respondents by **student type**

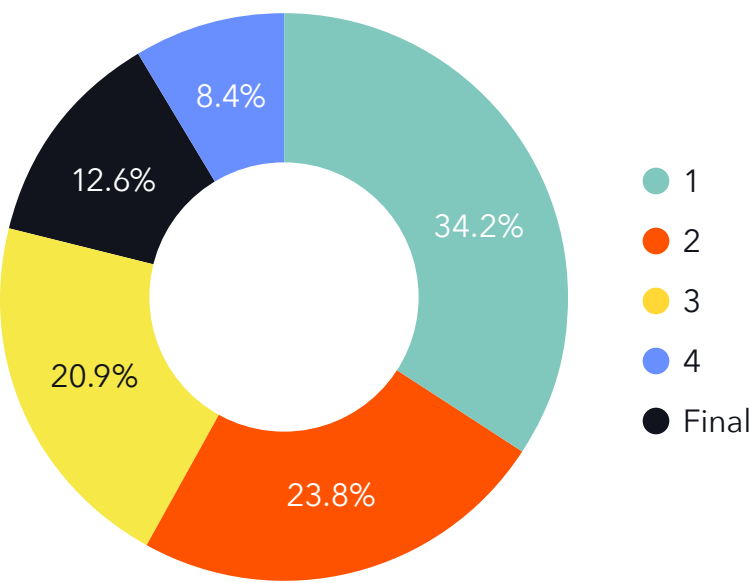


Respondents by **accommodation type**

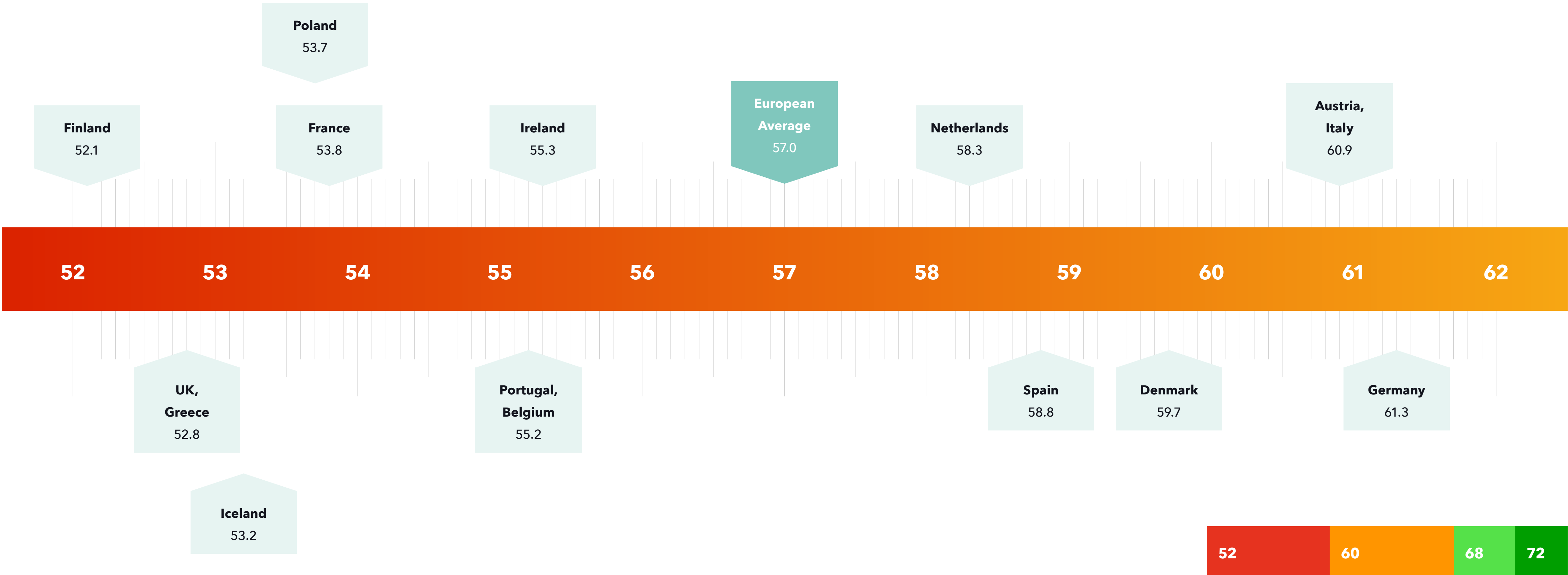


* PBSA (Purpose Built Student Accommodation) includes – private, not for profit/social student housing, and university halls.

Respondents by **undergraduate year of study**



Country Scores



This heatmap illustrates the range of MHI-5 values encompassing the lowest and highest-ranking countries, the metric is out of 100. The European average is calculated at 57* and the average figures for individual countries have been identified and visualised along the spectrum.

Policy Outcomes and Key Takeaways for the Sector

Overall, the policy implications point to the importance of community, engagement, belonging, identity, and choice being key drivers of student happiness. Efforts on behalf of stakeholders to improve access and – importantly – participation in facilities and services are therefore key to improving the student residential experience. Healthy environments impact happiness.

The Student Living Monitor adds to the bank of data that says students living in active communities benefit from community engagement. We are not presupposing all students will live in PBSA (Purpose Built Student Accommodation), but all the providers who took part in this survey care for students. Living in a student-based community, taking part in events and being surrounded by friends creates happiness. By being in a community, students' needs can be served, and we can improve their happiness and well-being.

If students who live in communities are happier, then a sector priority should be expanding supply so that many more students can take part in managed and supported communities. Students should also be able to access this supply, which means continuing work on affordability.

The areas of policy development, guidance to the sector can be segmented into four core areas of activity which are outlined on the next page.



Policy Development Areas: Key Recommendations

1

Availability and Choice

Planning to develop a sufficient volume of accommodation of the right type: More work could be done to understand student expectations of how they wish to live whilst studying, and being transparent about the availability of housing stock of different types. In some markets this knowledge is likely to be much more developed than in others.

Building real choice into housing design and portfolio offer: Allows students to feel that they are making proactive choices, putting them more in control of their situation.

Optimising and supporting new methods that can give agency to the students: Understanding among stakeholders that there is a need in the sector to be able to offer more autonomy and choice to students. This could be an opportunity for booking platforms or similar to provide a system where students can pick multiple housing options.

2

Engagement for Well-being

Engaging students in community is a key outcome of SLM. Building and nurturing community contributes to a sense of well-being for students.

It is not enough to provide an events programme, student participation is the important factor. The impact of living environment on happiness rises the more students engage. Students that attend events only “sometimes” report better well-being scores than those who do not and are more likely to recommend their accommodation to others. Respondents who take part the most in events and activities have the best mental health.

Fun and activity: When it comes to specific facilities, exercise and fun activities are seen in our results as having a particularly beneficial impact on student well-being. Facilities are about fun, exercise, sharing, and socialising. Being able to access shared spaces, bookable facilities and equipment is part of this.

3

Inclusive Community

Supporting students from non-traditional backgrounds and building an inclusive community and sense of belonging is a key finding in the survey. Some student groups, such as those with disabilities, non-binary individuals, and mixed ethnic backgrounds, exhibit in this research lower mental health scores for various reasons.

Combatting loneliness: Loneliness can be seen in the survey as having the most impactful negative effect. These results show just how important community and inclusivity are to students’ ability to thrive.

Signposting to those who can help: While it’s impossible to avoid all conflicts and social problems, a key finding is that respondents who lacked support resources were negatively affected.

An inclusive community takes diligent effort to curate, and much more work could be done to drive progress and student engagement in this area.

4

Targeted Support

Students with low mental health scores value and use mental health services. To enhance support, providers should collaborate with specialists’ organisations and universities for more professional and impactful assistance.

Services will be different in each country. Offering that support or signposting to those who can help is an area where all providers could do more to facilitate a positive living experience for the students.

Combatting hardship and its impacts on happiness and well-being: One in five students (21%) report that they are constantly worried about their finances. Students who are continuously worried about their financial situation have poorer mental health than those who do not. There is a correlation between poorer mental health and the impact of the living environment on well-being (Well-being_NPS). Where providers are able to offer a hardship fund, this needs to be actively promoted.

Introduction

The Student Living Monitor (SLM) is the only survey dedicated to understanding students’ happiness, and the influence that the housing environment of students has on their well-being. This research follows on from the pilot Well-being Monitor that was run by The Class Foundation in 2021, a survey where valuable work was done to understand the key drivers of happiness and well-being in student accommodation in the Netherlands. The results of that survey found that students were generally struggling, and that certain facilities and services boosted their well-being and living experience more than others. It also showed that there was more that can be done to support vulnerable groups with appropriate support services.

The report in 2023 examines patterns of student well-being and the relationship to their living situation and housing circumstances in Europe. The Class Foundation collaborated with key housing providers and research partners who have in total 700k+ students in their network. The data gathered allows us to develop an understanding of what can be done to improve student well-being from a housing perspective, in addition to engaging key stakeholders to tackle the issue collectively.

Three measures of impact

3,364 students from 40 European countries overall took part in the survey. In this report, we share the main findings and highlight some country-specific differences in the analysis. For countries with larger responses, country highlights and tables are also provided at the end of the report.

The report uses several measurements of well-being, mental health, and satisfaction in key drivers of happiness and well-being in student accommodation across the main markets in Europe. By looking across several measures, the SLM draws out conclusions on which elements of a student’s living experience have an impact on them – these can be positive or negative impacts, and areas where there is little discernible impact.



Name	Description	Scoring Method	Scale
MHI-5 Mental Health Index - 5	An internationally recognised scoring methodology to measure mental health	Scored based on aggregated response to five well-being questions	0-100 where 100 is optimum mental health and 0 is poorest ⁱ
Well-being_NPS Impact of accommodation on well-being	A score employed by the survey to determine the extent to which the respondents’ living environment is influencing their well-being	Respondents select a score 0-10. NPS rating method is set out on page 43	-100 to 100 where -100 is the worst score and 100 is the best
NPS Net Promoter Score	An internationally recognised measure of customer satisfaction and loyalty	Respondents select a score 0-10. NPS rating method is set out on page 43	-100 to 100 where -100 is the worst score and 100 is the best



The analysis takes care not to make direct 'cause and effect' links between MHI-5 and the other responses in the survey. It may be that a person has poor mental health overall and that their lack of engagement with facilities and services is because of their mental health situation. It may be that those reporting very good mental health are more confident in socialising. We cannot say that levels of engagement with social experiences in accommodation are leading to better mental health just by measuring MHI-5 alone.

The Well-being_NPS score adds depth to the analysis by making a direct link between the living environment of the respondent and their well-being. It has been used in tandem with other questions about living environment, facilities, and services to draw out areas where well-being is positively or negatively impacted. The NPS score is a proxy measure of satisfaction with accommodation. In this survey, we have analysed the questions using all three measures and explored the linkages, and the results reported in this analysis highlight the key findings. In general, the analysis shows there is a link between the two NPS Scores.

Where possible, external sources of data have been used to cross-examine the findings from this survey. Further information on the methodology can be found in the appendix, alongside a full pack of the European results.

Before launching into the findings, it is worth noting that respondents to the SLM survey had poorer mental health scores than expected in the general population. The respondents to this survey have recorded a mean mental health score (using MHI-5 0-100 scale) of 57, compared to the MHI-5 benchmark score of 60 which indicates the lower end of the spectrum of good mental health. We can see from other surveys that students suffer from mental health issues more than the typical population and that reporting of mental health issues within the student cohort is rapidly increasingⁱⁱ, with issues being particularly prevalent in the first year of study. The poorer sense of well-being in students is no doubt a contributing factor to the low scores in this survey, however, there may also be bias in the response towards students who wished to report their well-being issues.

The Class Foundation intends to run the Student Living Monitor each year and hopes that the volume of responses will increase over time. With a greater level of response in the future, with the continued support from The Class Foundation's partner organisations, the SLM will continue to develop, driving a greater depth of understanding into how housing providers can support students' happiness and well-being.

At the Country Level

The research at the country level suggests some powerful findings about accommodation types, services and facilities which have the most positive impact on students. The findings from Spain, Portugal and the Netherlands are of particular interest as these countries report the most positive impact of living environment on well-being. The size of the response rate by country holds us back from going further with the analysis. In future rounds of the SLM, there will be a continued emphasis on raising the number of respondents so that we can understand exemplar accommodation in greater detail.

The countries where mental health was reported as the best are Germany, Austria and Italy. The countries where respondents felt the greatest impact from their living environment are Spain, the Netherlands and Portugal. Spain, the Netherlands and Portugal are also the countries where respondents were most likely to recommend their accommodation - The Class Foundation suggests that the new (and fast-growing) supply of PBSA may be a reason - where levels of service and amenities are high (including swimming pools and mental health support). By contrast, in Belgium the market is largely comprised of private rented mainstream accommodation and small proportions of older accommodation/social housing.



Key Findings

Students with more control over where and how they live scored their well-being more highly than others.

There is a demographic difference between cohorts in terms of well-being scores. Supporting students from non-traditional backgrounds and building an inclusive community is important.

Relationships and social impacts appear to correlate with mental health scores in the survey. Building supportive communities and encouraging students to be good neighbours to each other can help.

The written comments section highlighted the importance of outdoor space, access to green spaces and nature, as well as large windows and natural light as particular benefits of their accommodation.

Even modest usage of in-house facilities and services by students bears a relationship to better well-being scores. There are two sides to this:

- 1. **Offering best-in-class facilities and services and encouraging participation.**
- 2. **Combatting isolation and loneliness, and improving access to specialist support services.**



AREA 1

Availability and Choice

The Student Living Monitor has highlighted factors that seemingly impact well-being scores:

Students with more control over where and how they live scored their well-being more highly than others. There is a stark differential in mental health (MHI-5) score between students who are living in their first-choice accommodation (MHI-5: 59) compared to those respondents who could not access their first-choice accommodation (MHI-5: 52), and in particular, those who could not *afford* to access their first-choice accommodation (MHI-5: 47).

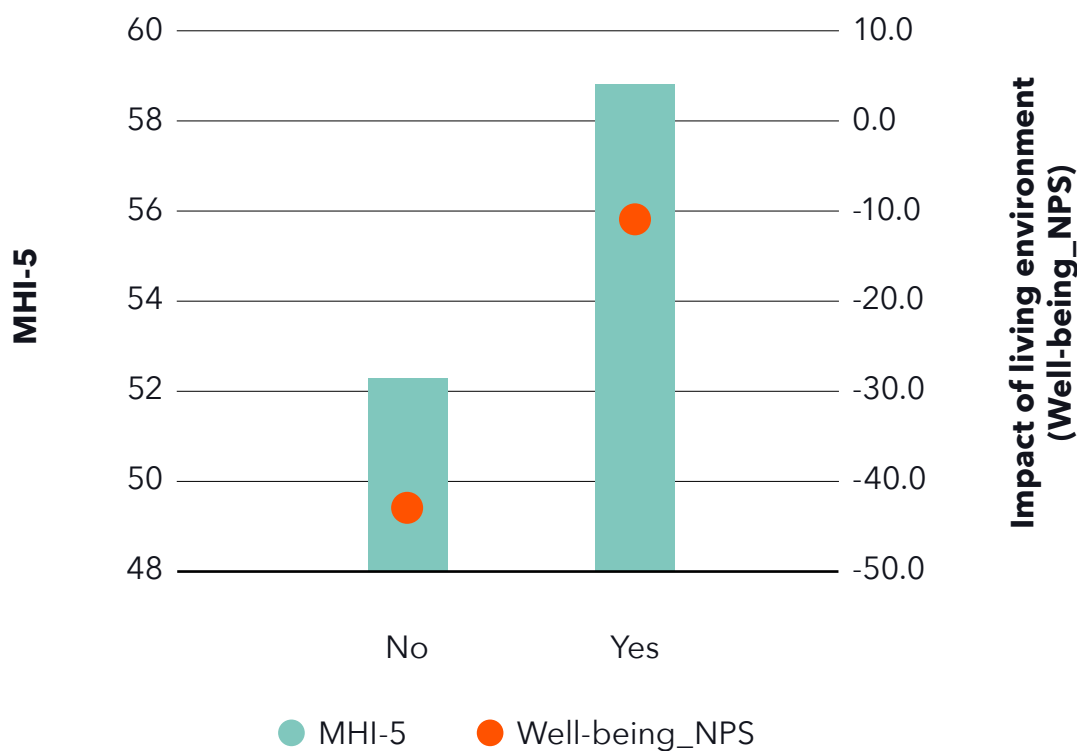
A smaller subset of results also revealed that respondents who ended up living at home when it was not their first choice correlated with low mental health scores (MHI-5: 45).

Students who did not get their first choice of accommodation report poorer mental health scores, and experience a less positive impact of accommodation upon their well-being.

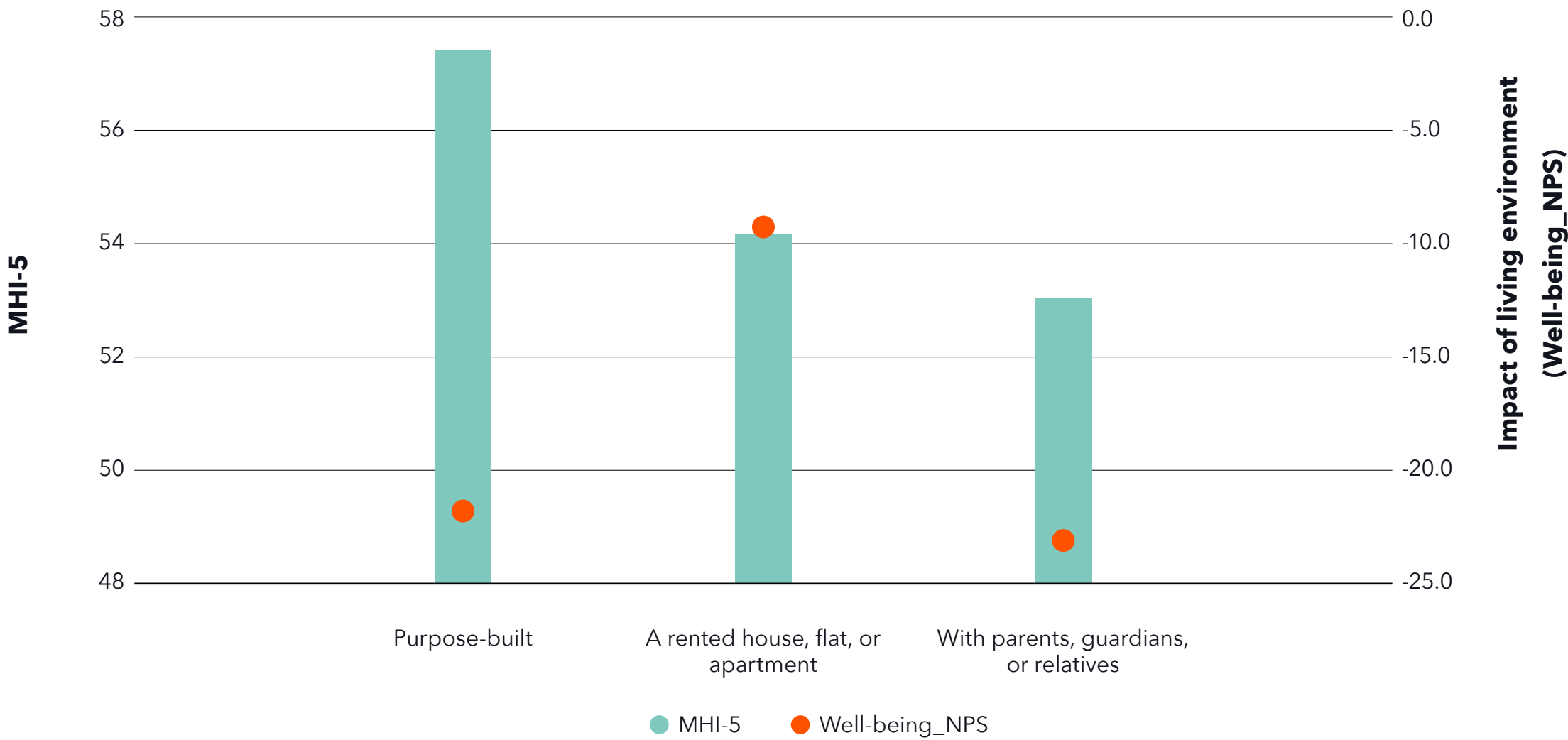
Students who did not get their first choice and this resulted in a commute of more than 40 minutes have more negative Well-being NPS scores (-48.0) than those that chose the commute (-7.3).

Respondents living in a rented house, flat or apartment were most likely to benefit from their house/flatmates' presence (perhaps they were able to choose who they lived with) and to say that their accommodation had a beneficial impact on them. The same is true within the small subset of respondents who were living in their own home.

Do you live in your first choice accommodation?



Accommodation Type and well-being scores (MHI-5) and Impact of living environment on well-being



“Accommodation is perfect. It is next to my classes so travelling is not a chore. Grocery stores are across the street which makes everything super convenient.”

Well-being Score: 9

Denmark, international student

“It’s given me an outlet for all possible needs in terms of my mental health by giving me my own space but also communal spaces to hangout with friends.” Well-being Score: 8

The Netherlands, international student

The average Well-being_NPS score for PBSA is 6.6, from 2,672 respondents. Students felt the most positive impact on their well-being from their student accommodation in Portugal (-1.3), Spain (1.7) and The Netherlands (2.2). Students in Iceland are most likely to live in university halls whilst in the majority of other countries, a student accommodation building owned by a private company is the most common form of accommodation among respondents.

Note that these results reflect those from the latest accreditation wave from Investor in Students (IIS), which surveyed 15,013 students across 316 PBSA properties in the United Kingdom. IIS saw an average NPS of 2.1 for the statement I feel that my accommodation experience supported my mental health’.

“Living with your parents in your hometown after 6 years of studying far away, it doesn’t help. I am doing my Master remotely because I couldn’t move to Nicosia” Well-being Score: 7

Greece, domestic student



“It wasn’t my first choice of home and I’m always late for school and so exhausted when I come home that I can’t really relax because I have homework.” Well-being Score: 5

Denmark, domestic student

Policy Recommendations

Planning to develop a sufficient volume of accommodation of the right type: More work could be done to understand student expectations of how they wish to live whilst studying, and being transparent about the availability of housing stock of different types. In some markets, this knowledge is likely to be much more developed than in others.

Building real choice into housing design and portfolio offer: Allows students to feel that they are making proactive choices, putting them more in control of their situation.

Optimising and supporting new methods that can give agency to the students: Understanding among stakeholders that there is a need in the sector to be able to offer more autonomy and choice to students. This could be an opportunity for booking platforms or similar, to provide a system where students can pick multiple housing options.

Recommendation for policy makers

- More student housing of the desired type, targeted to student needs, commuter patterns and amenities.

Student living community objective

- Building up housing choice.
- Giving more agency to students.

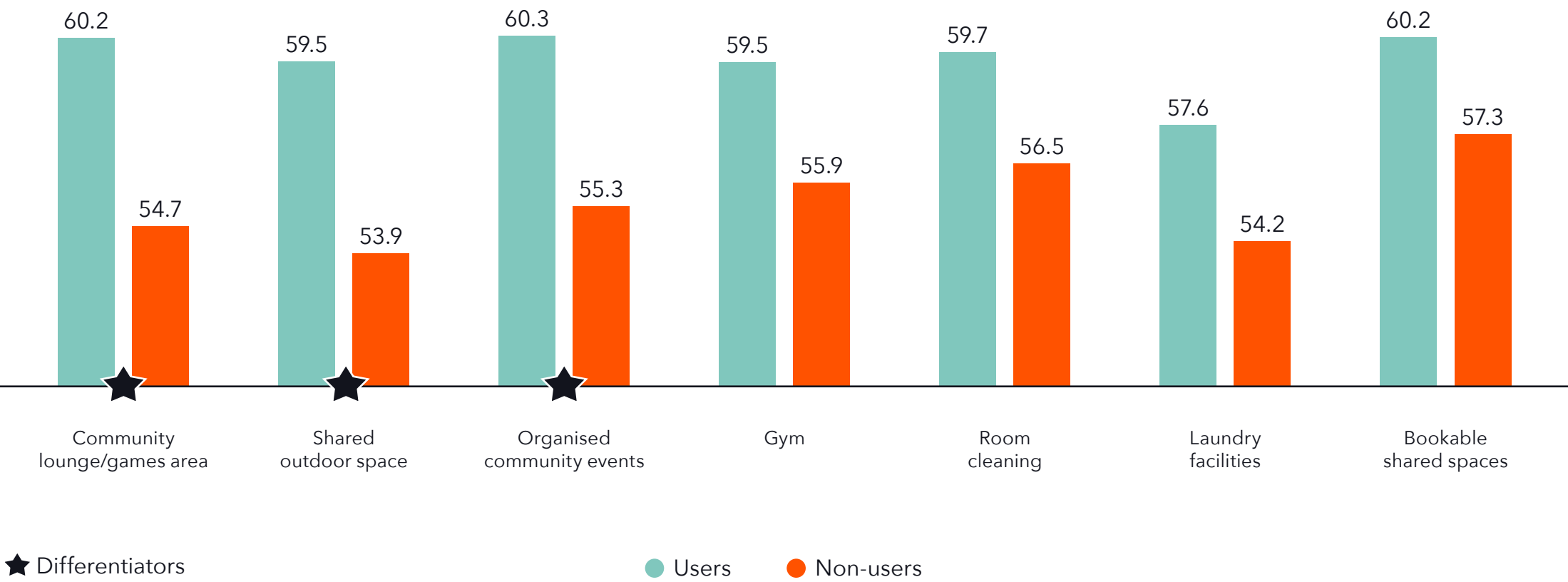


Engagement for Well-being

Even modest usage of in-house facilities and services by students bears a relationship to better well-being scores. Personal support and community events create a positive impact on student well-being. When it comes to facilities, community lounges, games areas, and shared outdoor spaces were amenities that when engaged with correlate to a population of students reporting better mental health. Students using facilities or accessing services offered within their accommodation were also most likely to recommend their accommodation to others (NPS score).

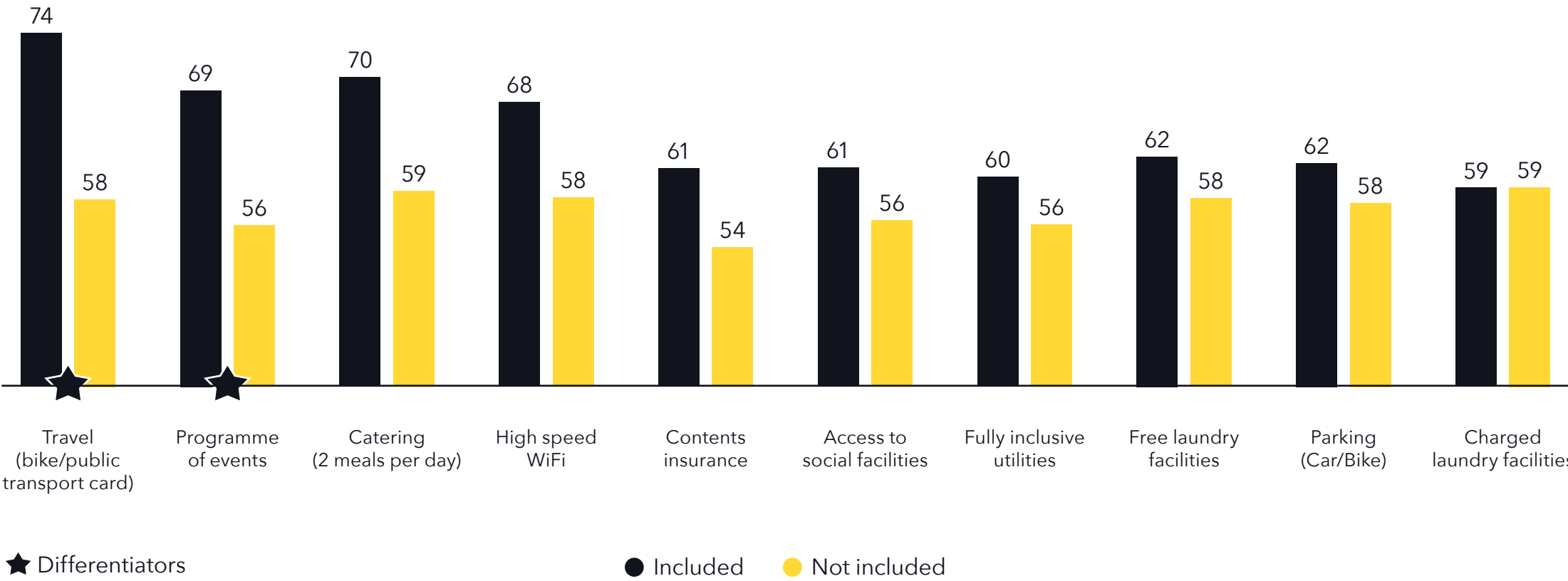
Services and Facilities usage with greatest differential in MHI5 reported

There were many other services such as parcel delivery, security and online apps which appear to be more hygiene factors than impactful services.



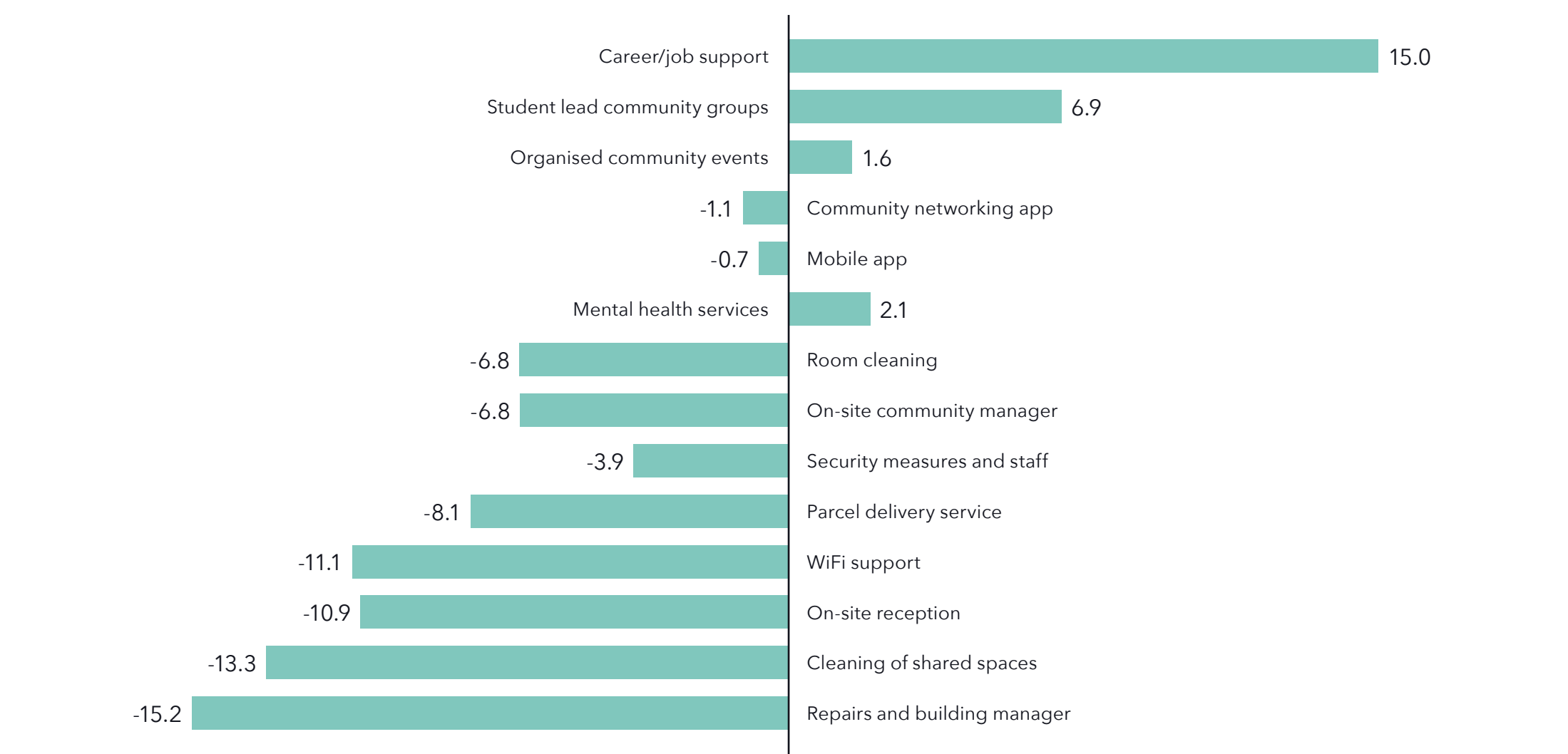
What's included in your rent? Impact of aspects of inclusive rents

Respondents who highlighted that a programme of events and travel (access to a bicycle or travel pass) scored their accommodation 1 point higher in the Well-being_NPS than those that did not.



Services: Impact of Living Environment on (“sometimes” and “often”) users

The services that appeared to have the most positive impact on respondents’ well-being can be seen in this chart.



“There are also a lot of events organised all the time which gives me even more options for meeting new people and socialising.”
Well-being Score: 8

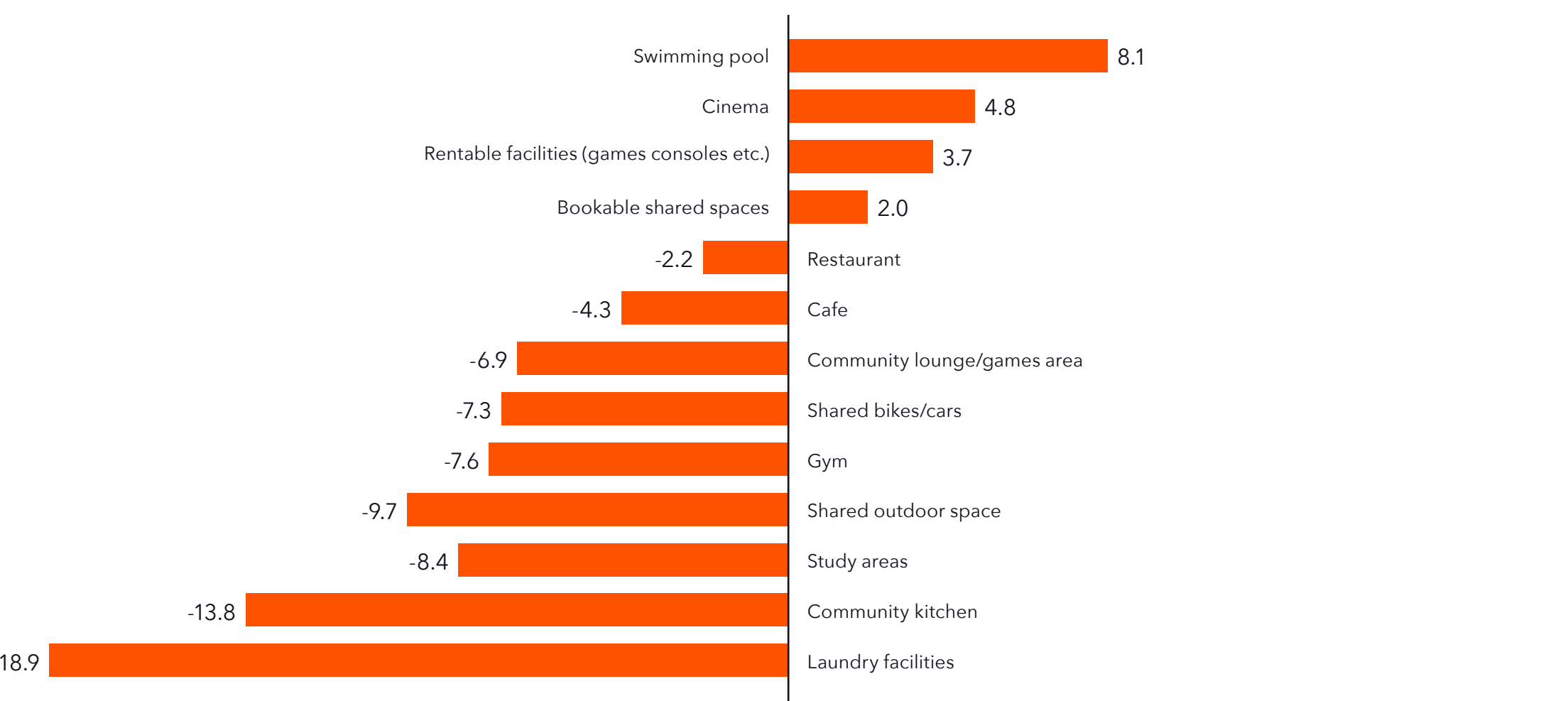
Austria, international student

“Having easily accessible food offered in the café, bookable cinema room (I love movies), staff at the reception and the gym where I go every weekend has a very positive impact on my mental health.” *Well-being Score: 7*

France, domestic student

Facilities: Impact of Living Environment (Well-being_NPS) on (“sometimes” and “often”) users

The facilities that appeared to have the most positive impact on respondents’ well-being can be seen in this chart. Although in many countries swimming pools are rare, they are cited often enough to be included in the analysis (356 counts of usage) and are particularly prevalent in Spain and Portugal.



“It is nice to live alone in my own flat, but still in a student accommodation with social events.” *Well-being Score: 7*

Denmark, domestic student

“It has no common or shared areas. Support is absent. It is too much expensive for what it offers. It has an events room but it is locked for the inhabitants.” *Well-being Score: 1*

Belgium, international student

Policy Recommendations

Policy perspective: Engaging students in community is a key outcome of SLM. Building and nurturing community is contributing to a sense of well-being for students.

It is not enough to provide an events programme; student participation is the most important factor. The impact of living environment on well-being rises the more students engage. Students that attend events only “sometimes” report better well-being scores than those who do not, and are more likely to recommend their accommodation to others. Respondents who take part the most in events and activities have the best mental health.

Fun and activity: When it comes to specific facilities, exercise and fun activities are seen in these results as having a particularly beneficial impact on student well-being. Facilities are about fun, exercise, sharing, and socialising. Being able to access shared spaces, bookable facilities and equipment is part of this.

Recommendation for policy makers

- More encouragement/incentivisation of new development/refurbishment that enhances community experience, facilities and amenities, focussing on services and facilities that have the greatest impact on happiness and positive well-being.

Student living community objective

- Effectively curating facilities, programmes and support to develop greater understanding of how to engage student communities.



AREA 3

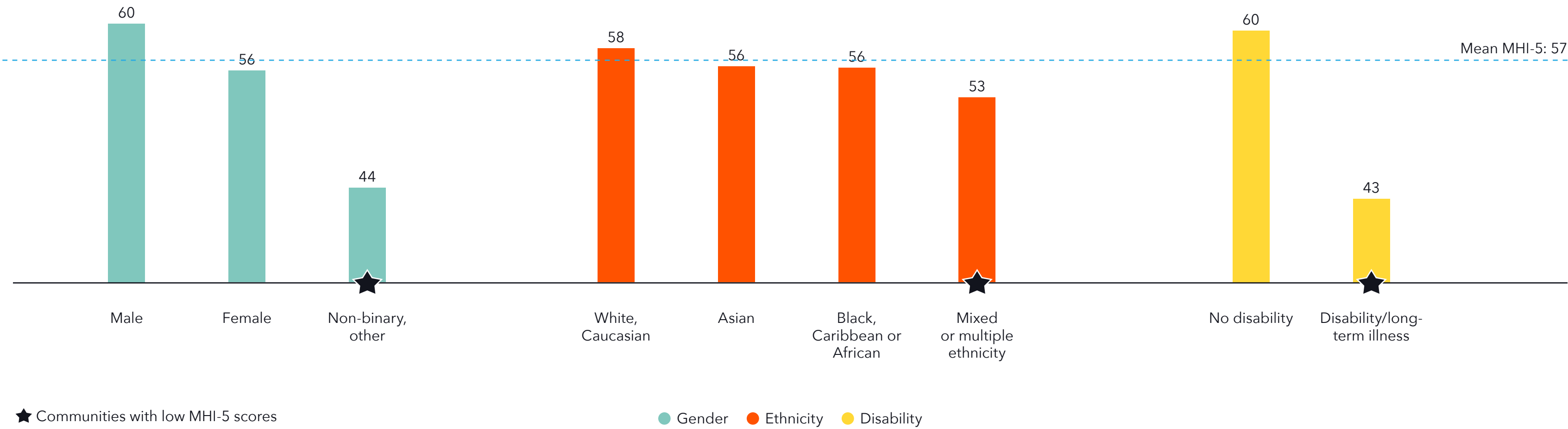
Inclusive Community

Impact by Demographic

There is a demographic difference between student groupings in terms of well-being scores. Students expressing themselves as non-binary represent a small proportion of respondents (2%), but this is a group whose mental health is very poor. In the group of students reporting their ethnicity as non-white, mental health was poorer, particularly in mixed-ethnicity respondents. There is a stark difference in well-being of people who have a disability and those who do not.

The lowest NPS and Well-being_NPS scores are reported by the student groups who report the poorest mental health. Those reporting a disability or long-term illness and those who report their gender as “other” or “non-binary” feel the least positive benefit from their living environment.

MHI-5 score by student demographic



Relationships and social impacts

Relationships and social impacts appear to correlate with mental health scores in the survey. The survey asked what aspects of the student experience had the most negative impacts on respondents’ personal well-being. The most common responses were academic issues such as keeping up with coursework and exams. However, it is the social aspects where the greatest differential in mental health is found. When comparing the mental health scores of students who are experiencing social issues to those who are not, there is a much greater differential in mental health score.

These trends are mirrored in the latest Investor in Students assessment of PBSA providers in the United Kingdom, where non-binary respondents (1.9% of population) reported significantly lower scores for ‘I feel part of a community here’ of -33.1. This is 29 points lower than the average IIS score of -4.6ⁱⁱⁱ.

Importantly, loneliness is the most cited issue and one where a large number of respondents cited a negative effect on their personal well-being. Bullying and discrimination are also cited as having a negative impact on well-being, thankfully by fewer respondents.

Loneliness is reported as a particularly bad issue in France (50% of respondents highlighted the issue), Portugal (48%), Denmark and the United Kingdom (46%). Respondents in Italy (38%), Spain (38%) and Belgium (39%) were least likely to report issues of loneliness.



“Last year I spend a month in a mental hospital. In this dorm everyone is super friendly and supportive and have become my best friends.” Well-being Score: 10

Italy, domestic student

“Without the activities at the dorm, I would probably be much more lonely.” Well-being Score: 9

Denmark, domestic student

“Would be better if there was more of a community emphasis / support services, but isn’t terrible.” Well-being Score: 6

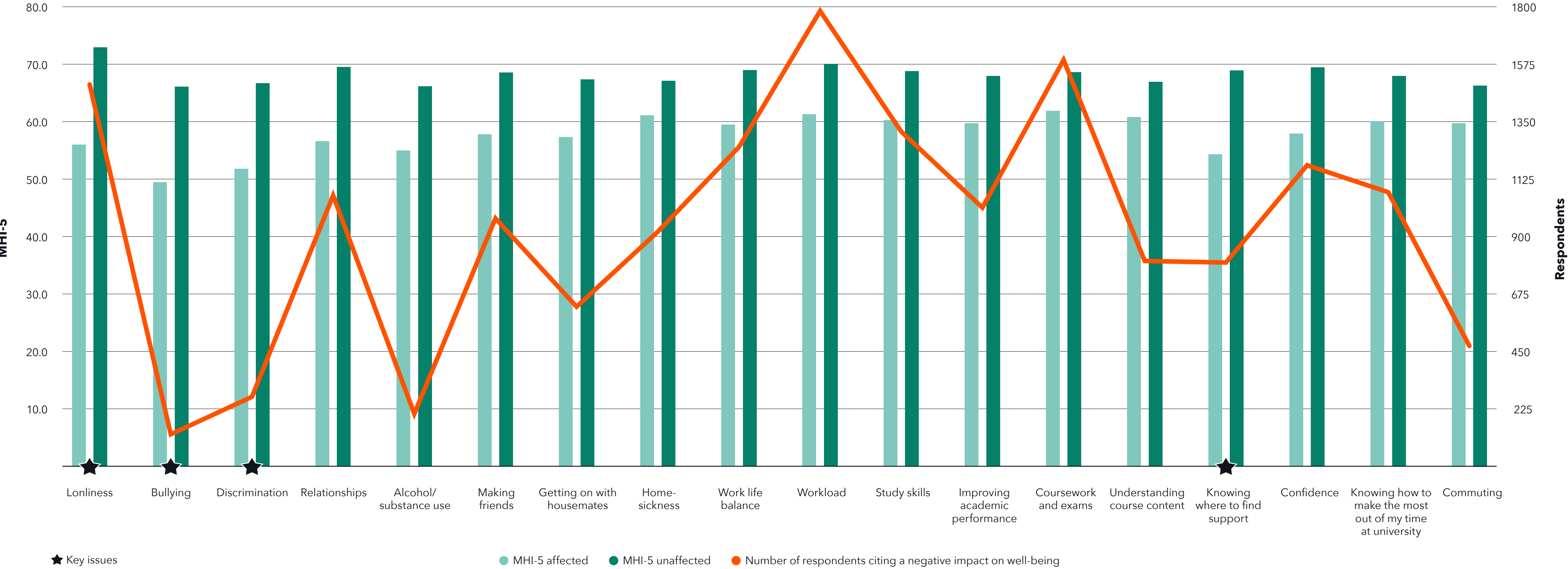
Belgium, international student

“I live in the half basement which makes me feel like I live in the box. Loneliness is making me depressed. ” Well-being Score: 0

Slovenia, international student

We'd like to know if anything about your student experience has had a negative impact on your personal well-being. Please review the options below and select any that are relevant.

Responses sorted in order of greatest differential in MHI5 between respondents citing an issue and not.



Policy Recommendations

Supporting students from non-traditional backgrounds and building an inclusive community and sense of belonging is a key finding in the survey. Certain elements of the student community appear to have poorer mental health scores than others for many different reasons. Groups, where the MHI-5 scores are poorer than average, include those reporting a disability or long-term illness, those reporting as non-binary, and those from mixed ethnic backgrounds.

Combatting loneliness: Loneliness can be seen in the survey has having the most impactful negative effect upon students. These results show just how important community and inclusivity is to students' ability to thrive.

Signposting to those who can help: Although it is impossible to prevent conflict and social issues from arising, one of the most important things highlighted in the results was the negative impact being experienced by respondents who didn't know where to find support.

Much more work can be done to drive progress and curating a happy and inclusive student community.

Recommendation for policy makers

- Improve community programmes by understanding the needs of non-traditional students – one size doesn't fit all

Student living community objective

- Increase well-being of non-traditional students



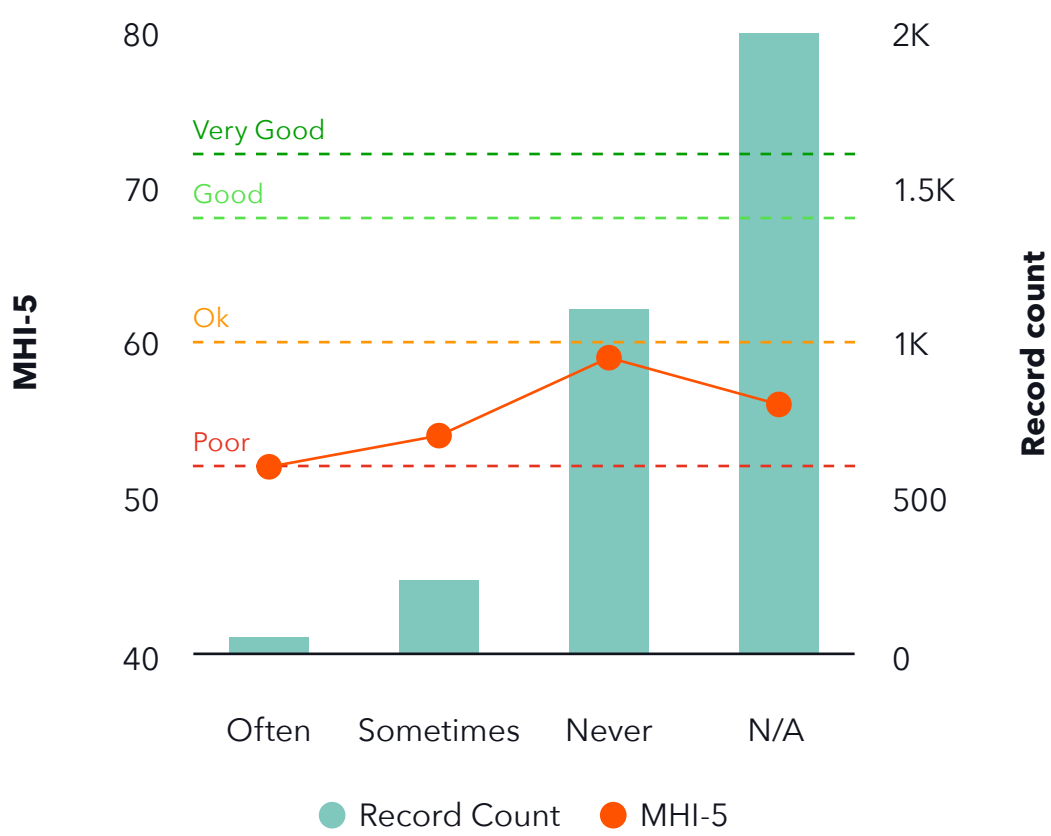
Targeted Support

Mental Health

The need for specialist support services is evident in these results. It is particularly interesting to see the usage of mental health services when and where available and accessible to students. There is a need for care in analysing these results in detail as they are a small sample, and importantly due to the needs of the student body. The Student Living Monitor highlights in this round that the usage of mental health services is most regular in those who report low MHI-5 scores.

Further work in this area is needed to understand how being able to access services within residential providers has impacted students’ happiness and well-being. The responses regarding mental health services raise many more questions on how providers can best help students.

Mental health services and their impact



“Because my living environment influences my mental health the most.” Well-being Score: 9

The Netherlands, international student using mental health services often

“I have a peaceful environment at my accommodation which allows me to ‘unplug’ the switch of my everyday worries.”

Well-being Score: 9

Portugal, domestic student using mental health services often

“I create the space I live in and with mental health struggles it can be hard to keep on top of everything however there is a lack of support here and that has had an impact upon my well-being” Well-being Score: 4

United Kingdom, domestic student

“I really don’t like living here, I don’t feel comfortable with the place, the environment and the people” Well-being Score: 1

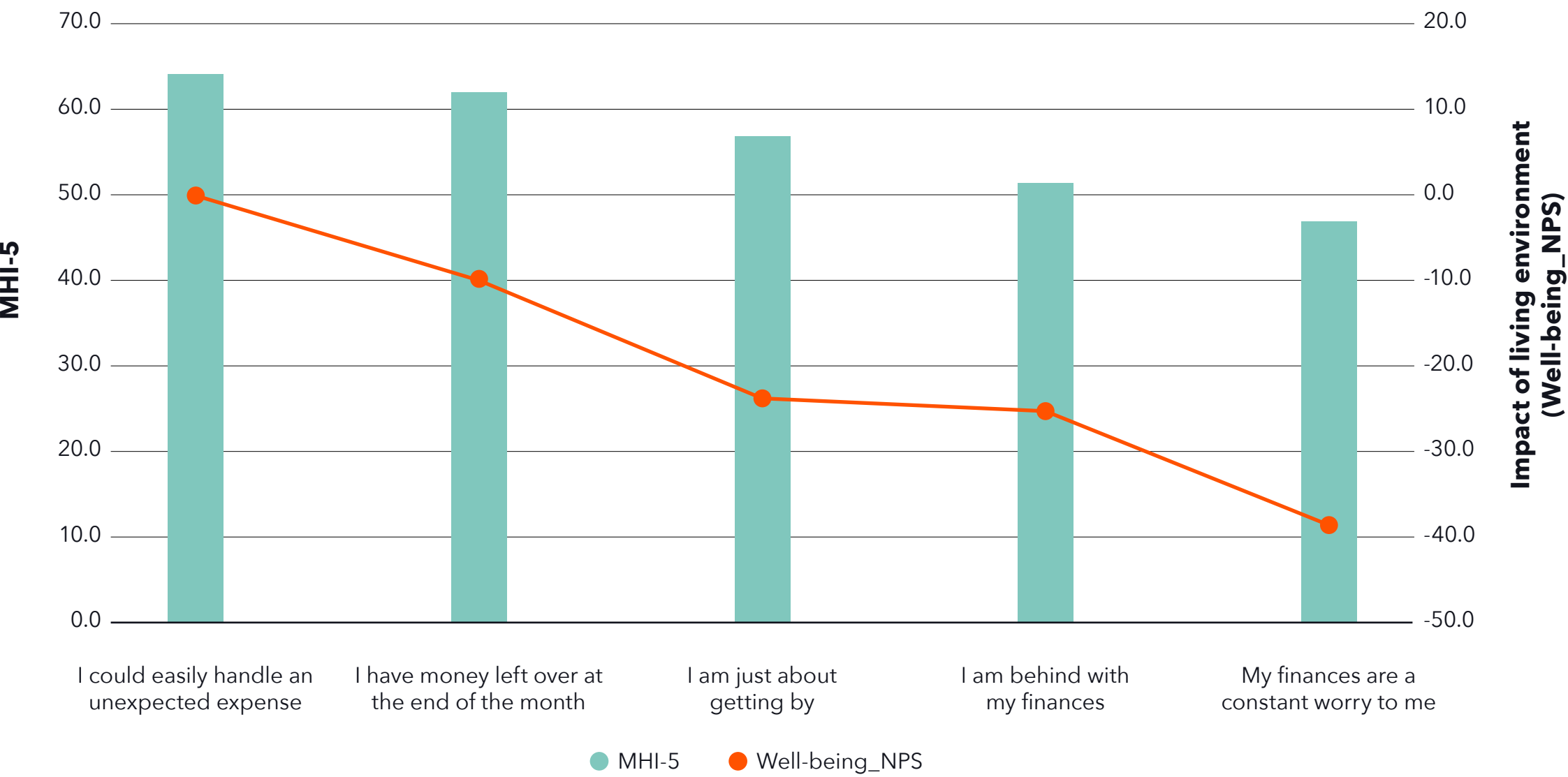
Denmark, international student using mental health services often

Cost vs Affordability

Although there is no discernible difference between the well-being scores of respondents according to the amount of rent they pay, this is not the case when looking at how respondents felt about their financial situation. Those who were at ease financially display much better MHI-5 scores than those whose finances were a constant worry. One in five students (21%) report that they are constantly worried about their finances.

Students who are continuously worried about their financial situation have poorer mental health than those who do not. There is a correlation between poorer mental health and the impact of the living environment on well-being (Well-being_NPS). Where providers are able to offer a hardship fund, this needs to be actively promoted.

Thinking about your finances, please select the statement that best describes your position during your studies



“Student housing is of great quality, affordable, perfectly located and helps students to save up some money for the future.” Well-being Score: 9

Iceland, international student

“My living environment is reasonably quiet, it is outside of the city center with a large amount of green space in the surrounding area, and it comes with helpful facilities.”

Well-being Score: 8

Denmark, international student

“Since finance is a constant worry to me, and rent is one of my biggest expenses, there is a constant question in my head whether where I live is worth the money or not.”

Well-being Score: 5

Belgium, international student

“It’s almost impossible to afford my rent so I have to work ALL THE TIME while I study more than 37 hours a week. How should it even be possible to survive? Like I don’t even have money to feed myself.” Well-being Score: 1

Denmark, domestic student

Policy Recommendations

The provision of mental health services appears to be both used and valued by students who report poor mental health scores. Providers should consider how they offer such services, networking into specialist organisations and university services to ensure that mental health support is offered and addressed in the most professional, consistent and impactful way.

Services will be different in each country. Offering that support or signposting to those who can help is an area where all providers could do more, and where “accommodation providers have a unique opportunity to help students make the most of their university experience”.^{iv}

Combatting hardship and its impacts on happiness and well-being: Students who are continuously worried about their financial situation have poorer mental health than those who do not. There is a correlation between poorer mental health and the impact of the living environment on well-being (Well-being_NPS). Where providers are able to offer a hardship fund, providers should actively promote it to their tenants.

Recommendation for policy makers

- More scholarships, focus groups that experience financial distress.
- More mental health support/more mental health services and easy access.

Student living community objective

- Inclusion support- which are often not available or accessible – seek partnerships with mental health providers, charities and specialist providers.
- More help, and offer of help to those suffering hardship due to their rent.



Other Findings

Respondents had the opportunity to type their own responses into the survey. By answering why they had scored their accommodation’s impact on their well-being, respondents told us a great deal about other reasons why they liked or disliked their accommodation.



“I have easy access to a lot of green space. There is a small forest and lake nearby. Access to nature is hugely important to me.”

Regarding access to green space



“There is a lot of green space around which helps a bit when I’m feeling down.”

Regarding access to green space



“I would like to have a nature view from my window while I’m on my desk. Also, there’s no proper ventilation so it gets hot inside during the summer, and no bug screen on the window, so I can’t keep them open either.”

Regarding access to green spaces



“I LOVE the green areas and the nature close by and my terrasse (good things), but the dorm is too far away (so no top grade for it).”

Regarding access to green spaces



“It’s nice and modern with big windows and high ceilings. I even have a view from one spot. Makes me feel better than I would elsewhere.”

Regarding bright light, windows



“Recently renovated and bright apartment, my plants.”

Regarding bright light, windows



“Zero fresh air. No windows to open at all.”

Regarding bright light, windows



“Windows don’t open - no airflow, sun shining directly in room all day making it unbearably hot - constantly gives me migraines and dizziness.”

Regarding bright light, windows



“I am very stressed because of studies but my friends help me a lot.”

Regarding friends



“University is stressful and there are very high expectations. But I’m lucky to have friends who are able to reassure me and with whom discussions are always positive.”

Regarding friends



“The University haven’t been welcoming at all, and it has been very hard to make friends with people my age.”

Regarding friends



“We are not really friends with my flatmates so it makes it a bit difficult sometimes.”

Regarding friends

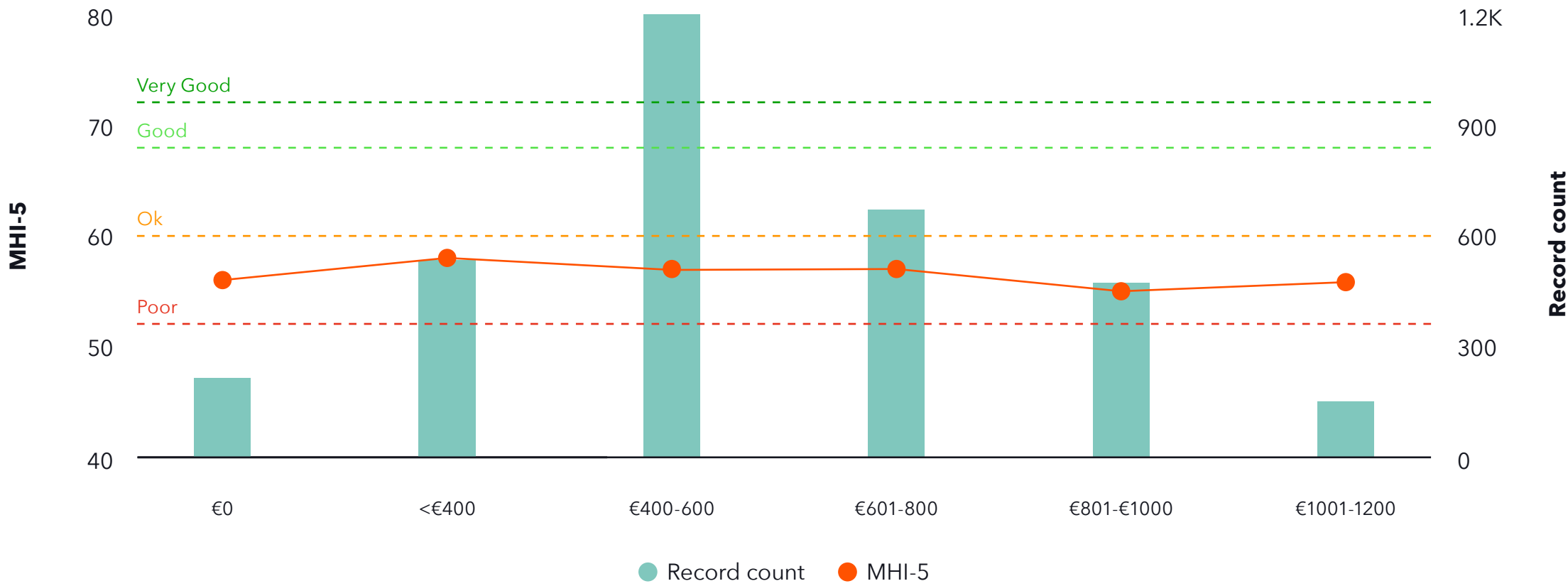
Areas of Little to No Impact

The survey has also highlighted areas where well-being and accommodation situation do not have a correlation.

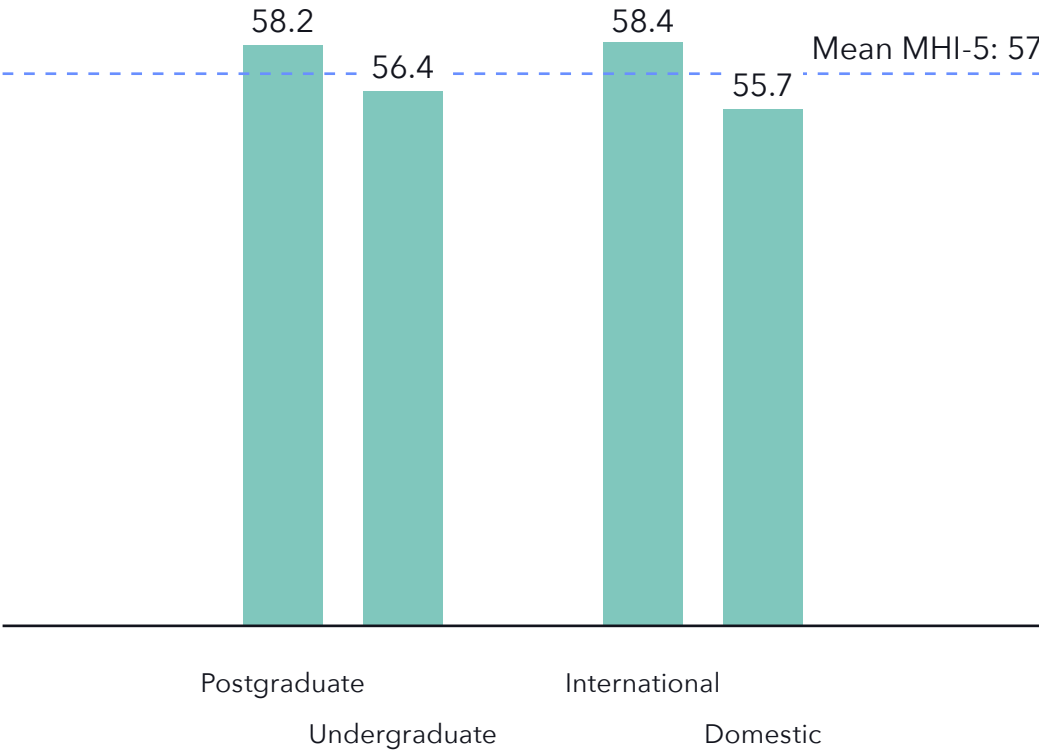
The amount of rent paid by respondents did not correlate with their sense of happiness and well-being, and there was only a modest increase in the likelihood to recommend accommodation – or feel a positive impact from the living environment as rent rises (suggestive of higher quality accommodation).

Whether a student had a job or not did not appear to affect any measure of well-being or satisfaction with their accommodation. Students in some countries were more likely to have a job (Iceland, Denmark and Germany) than others. In Portugal, Spain and Italy the prevalence of employment within respondents was particularly low.

Rent and MHI-5 score



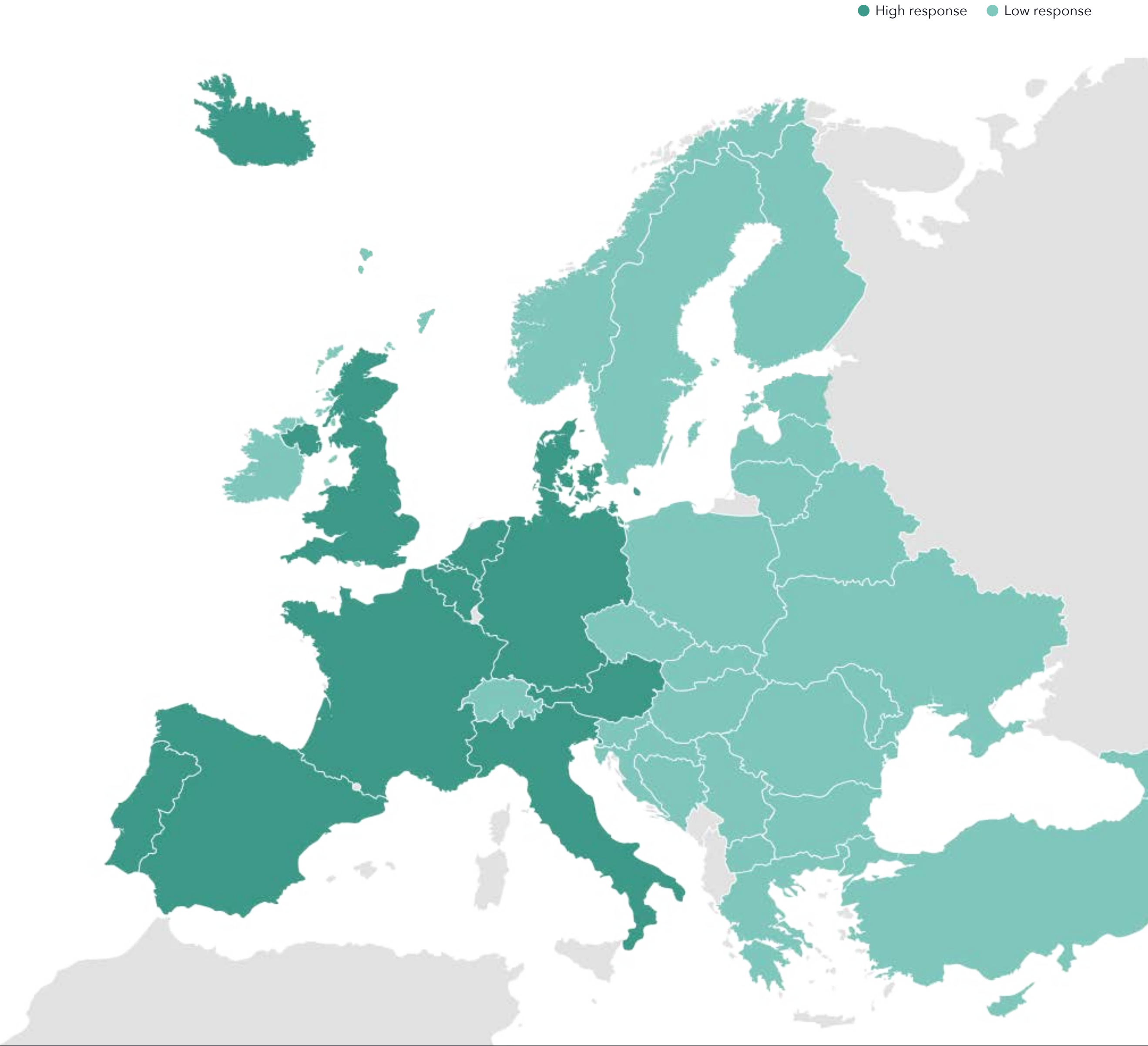
Level of study or international or domestic status had a negligible effect on mental health scores.



Country Highlights

Respondents by **country of study**

Denmark	567
Iceland	323
Spain	297
Austria	282
France	265
United Kingdom	258
Belgium	235
Italy	234
Netherlands	183
Germany	165
Portugal	158
Other	397
Total	3,364



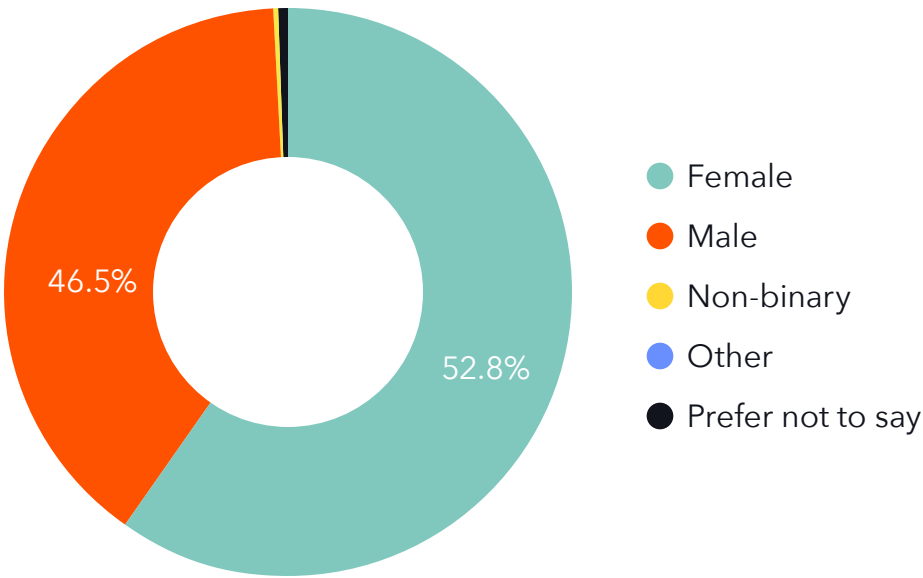
Austria



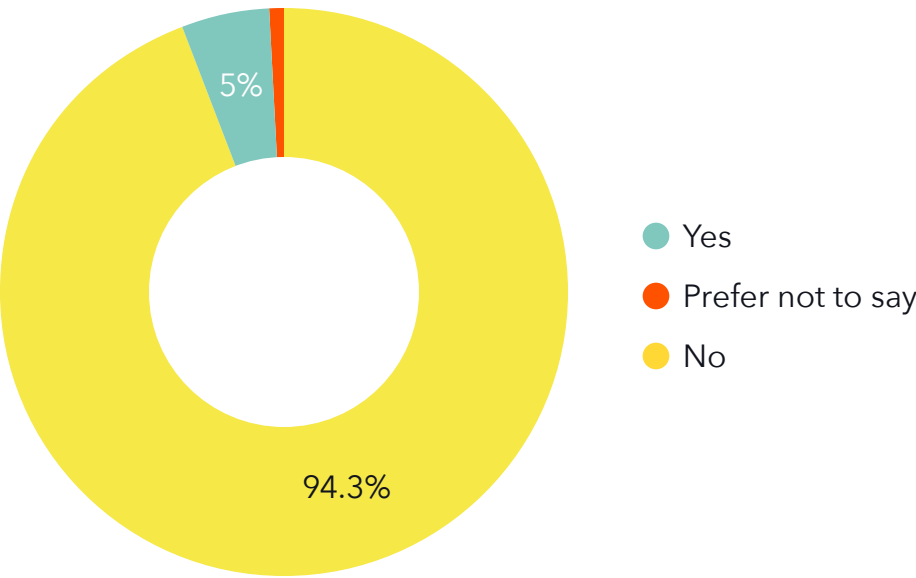
Austria combines affordable education with a high quality of life. The accommodation market is largely characterised by social and public housing, with a particular focus on meeting sustainability standards such as passive housing schemes.

Respondents: **282**
Modal monthly rent range: **€400 - €600**

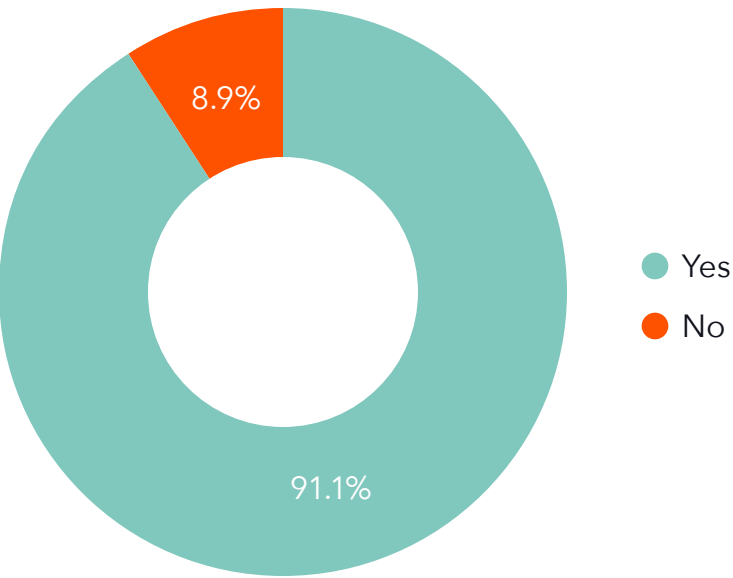
Respondents by **gender**



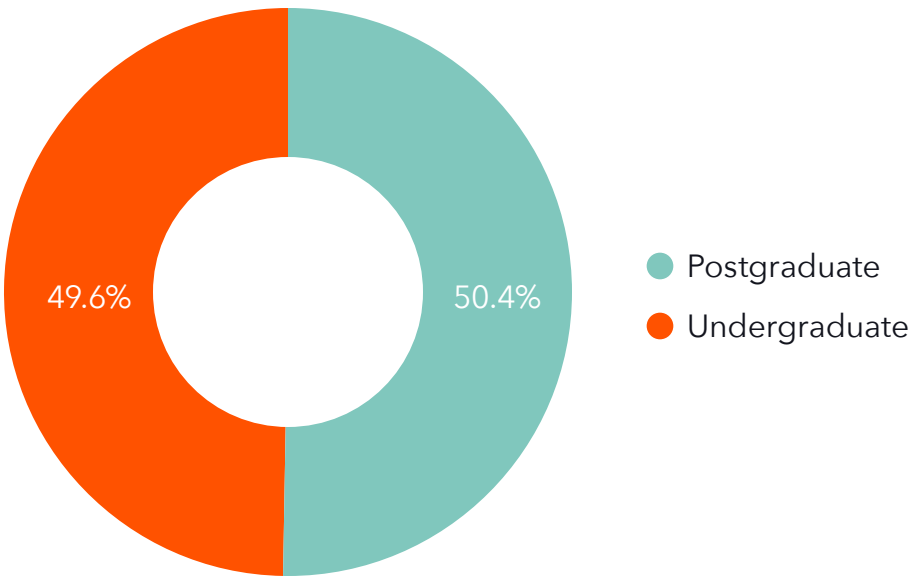
Respondents by **disability**



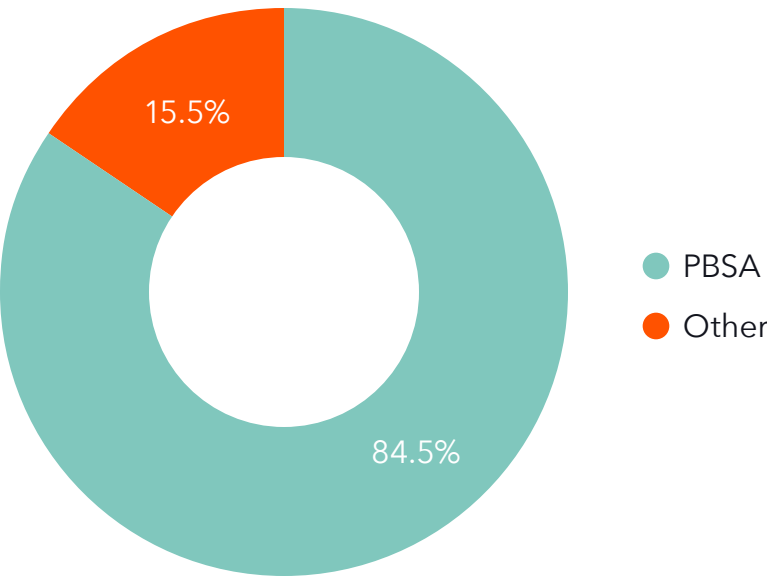
Respondents by **international status**



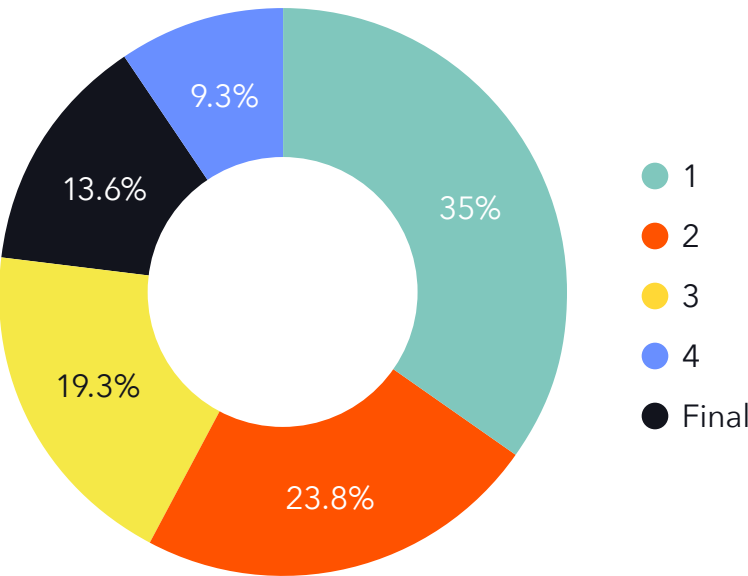
Respondents by **student type**



Respondents by **accommodation type**



Respondents by **undergraduate year of study**



Belgium



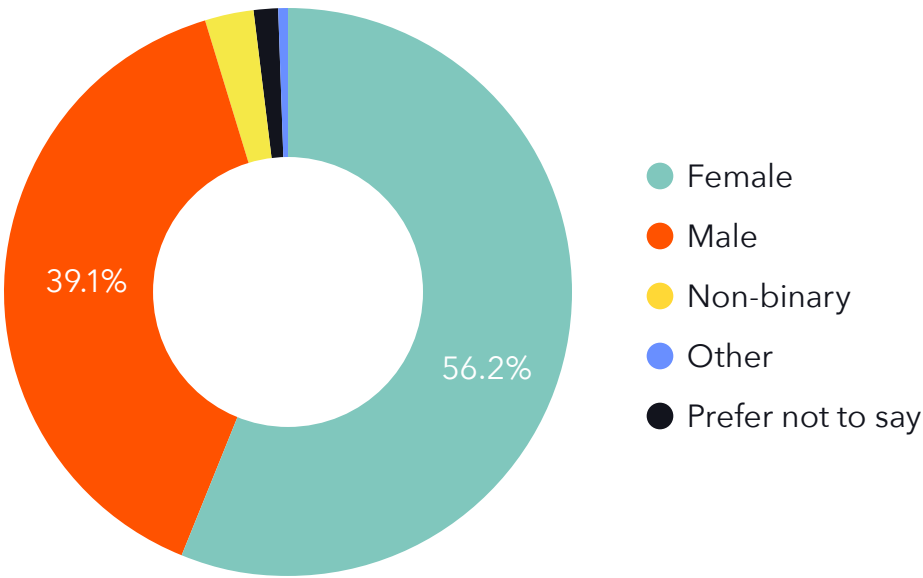
Belgium offers diverse cultural experiences, multilingual education options, and central European location, but navigating administrative processes can be intricate. The housing market also suffers from a shortage of available student beds, leading many to stay in rooms in the private rented sector.

Respondents: **235**

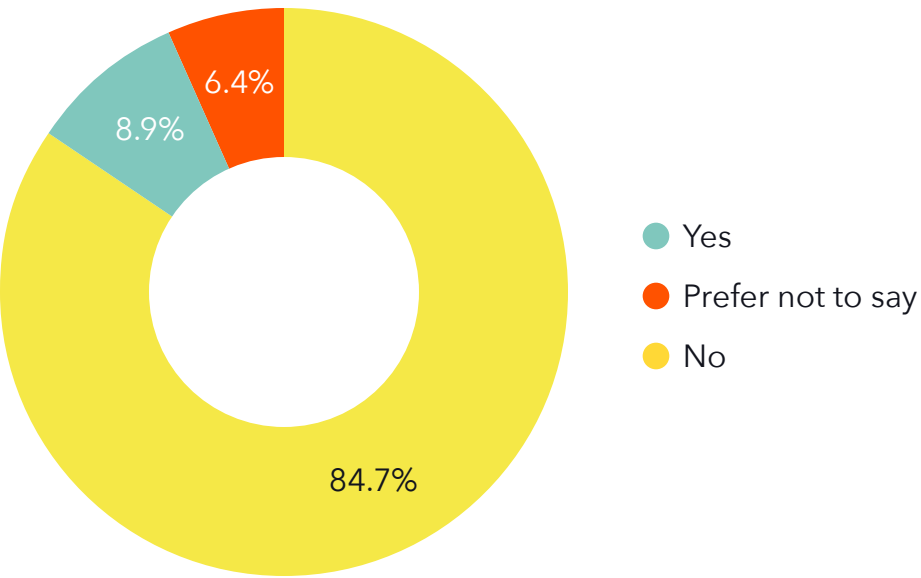
Modal monthly rent range: **€400 - €600**

Stand-out availability and use of facilities: **Community Kitchen**

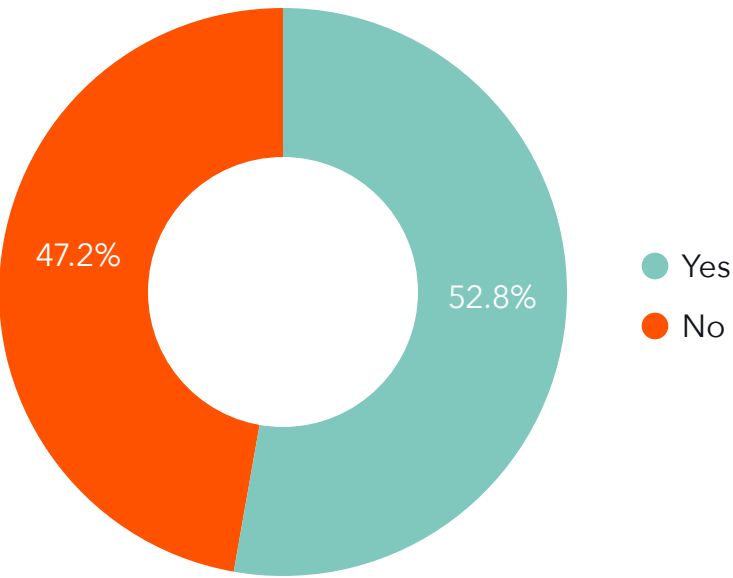
Respondents by **gender**



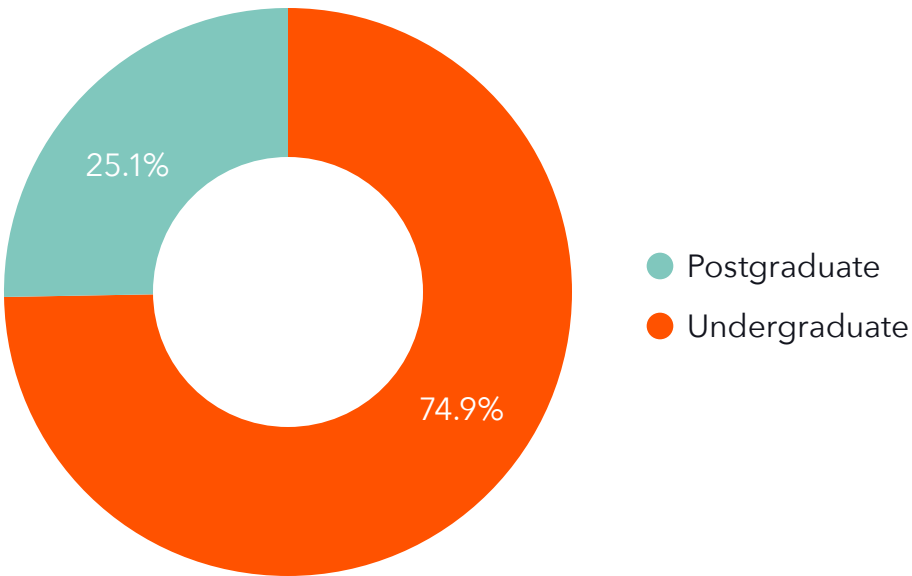
Respondents by **disability**



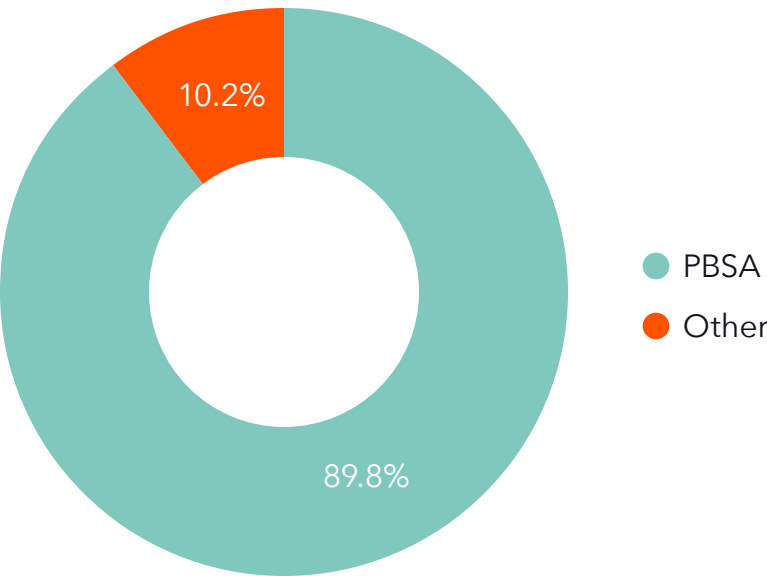
Respondents by **international status**



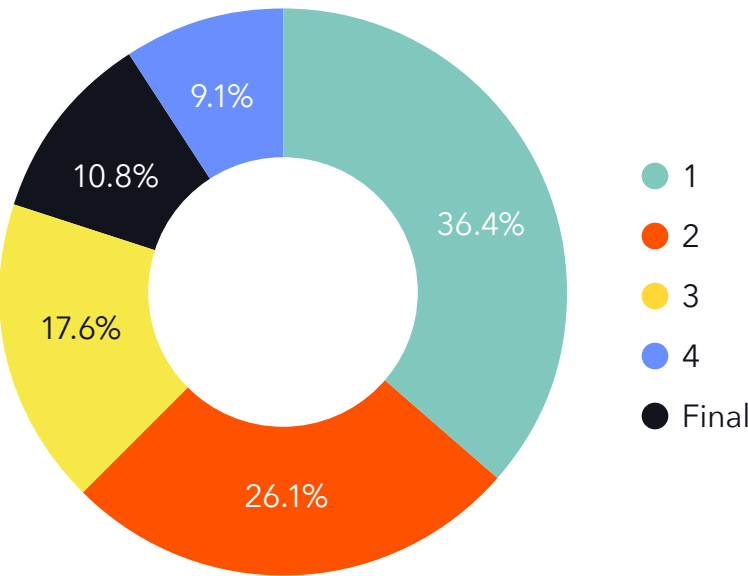
Respondents by **student type**



Respondents by **accommodation type**



Respondents by **undergraduate year of study**



Denmark



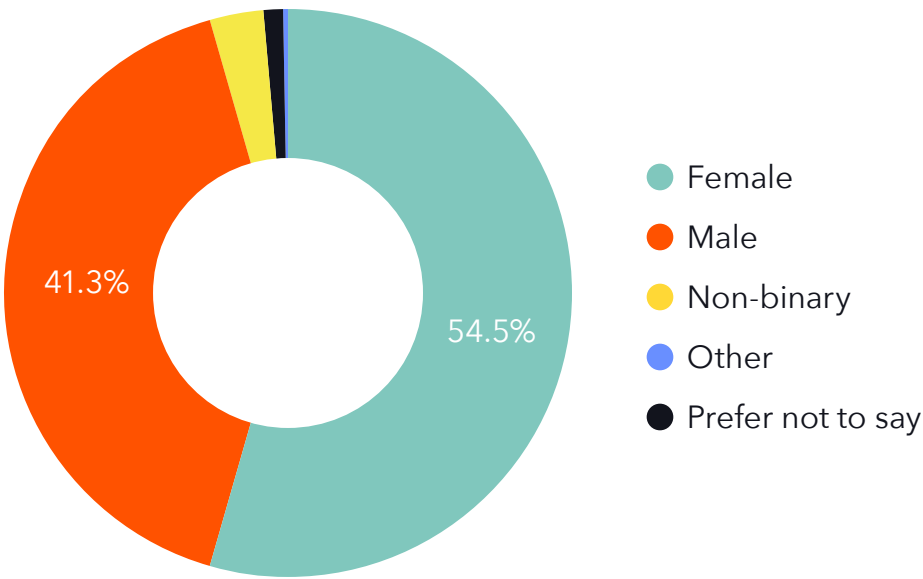
Denmark offers students access to high-quality English education, reputable universities, excellent infrastructure, and an open-minded atmosphere. Generally, students rely on older stock run by the social housing sector or look for accommodation in the private rented market.

Respondents: **567**

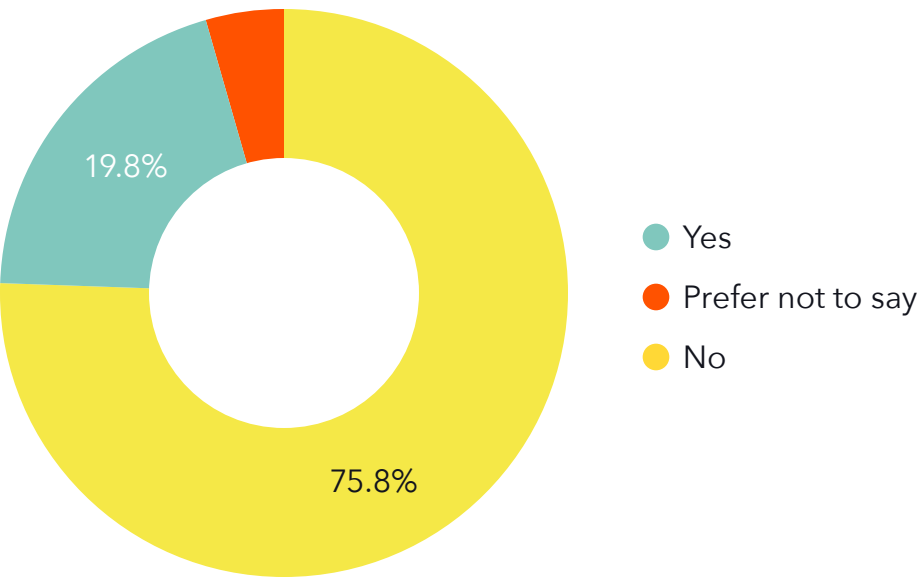
Modal monthly rent range: **€400 - €600**

Employment: **64% reported having a job**

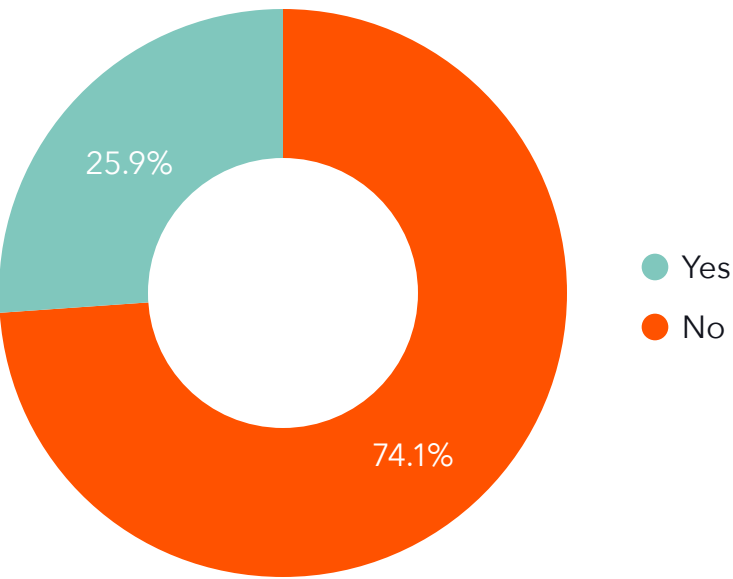
Respondents by **gender**



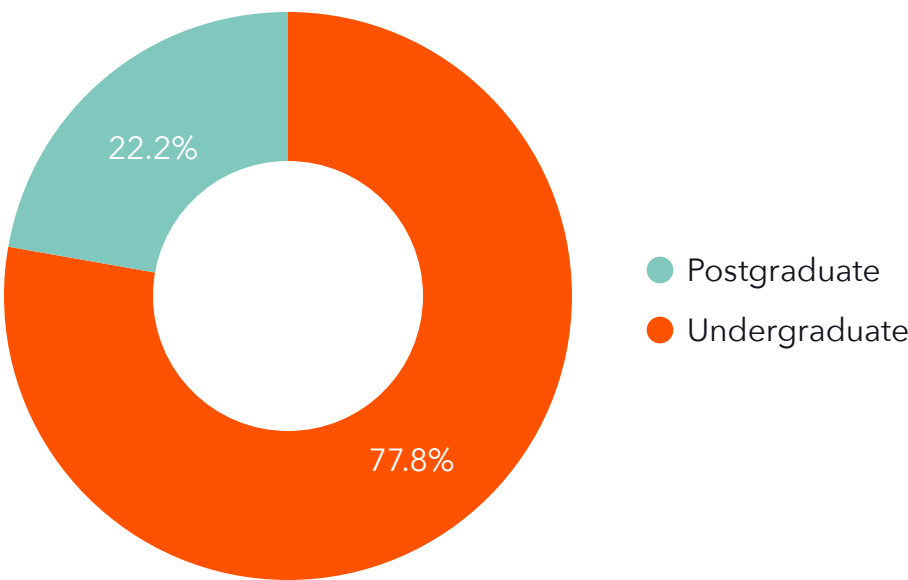
Respondents by **disability**



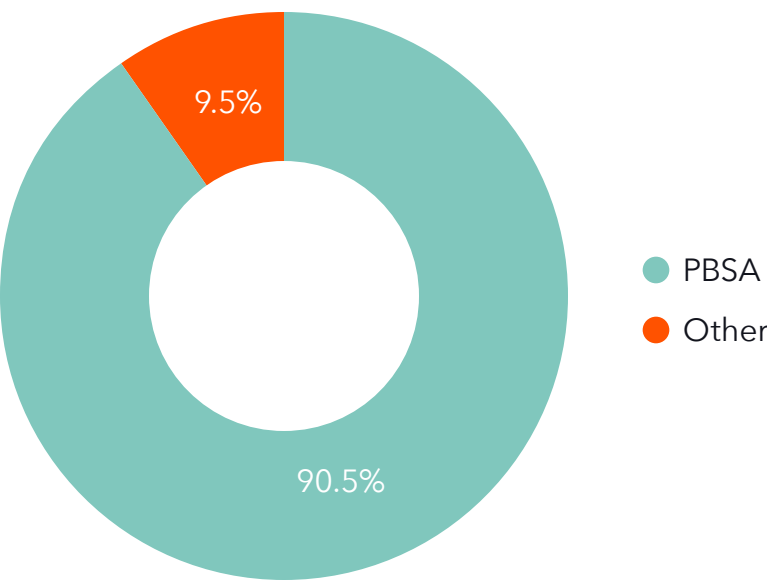
Respondents by **international status**



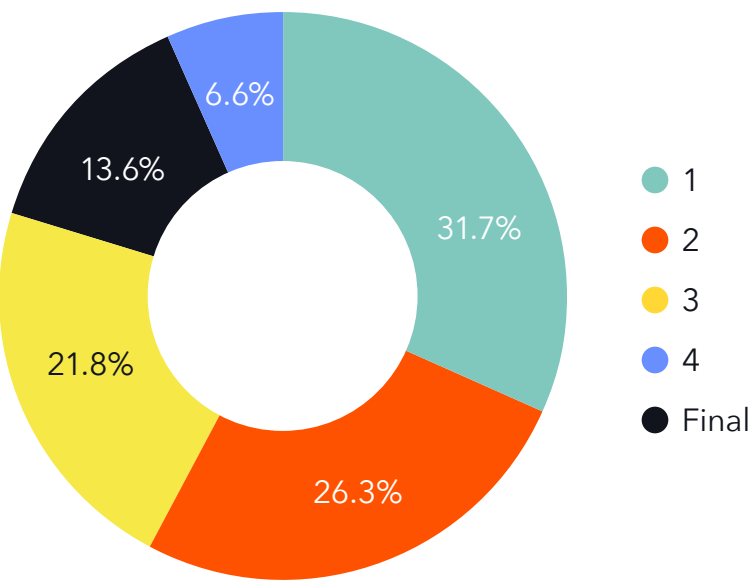
Respondents by **student type**



Respondents by **accommodation type**



Respondents by **undergraduate year of study**



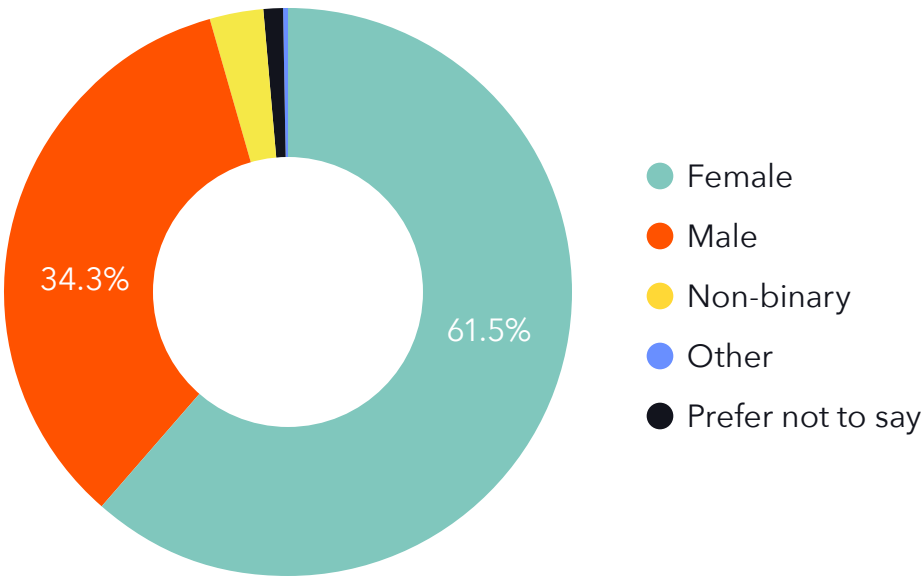
France



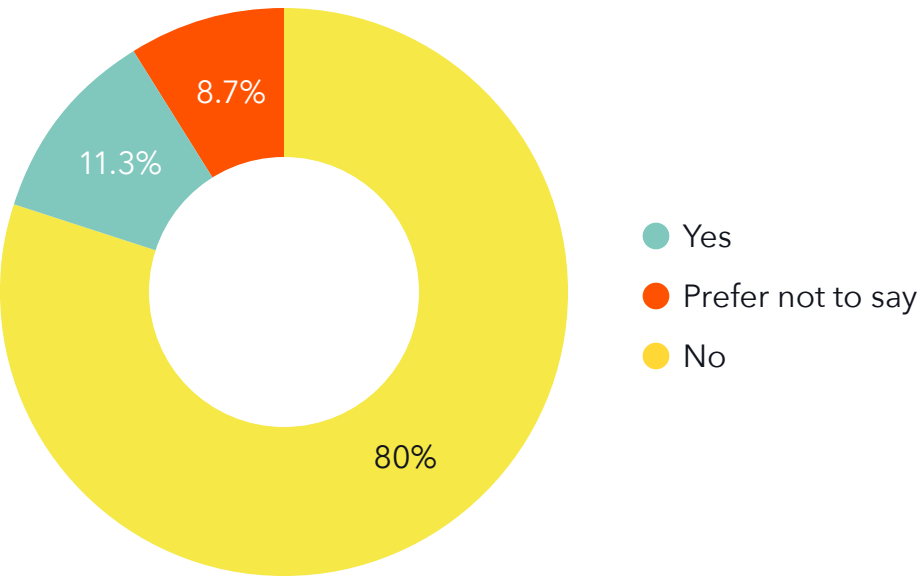
France is home to world-renowned institutions, affordable education, and a rich cultural heritage, enhancing the overall student experience. However, complex planning regulations present a challenge for prospective investors and developers looking to build more student housing.

Respondents: **265**
Modal monthly rent range: **€400 - €600**

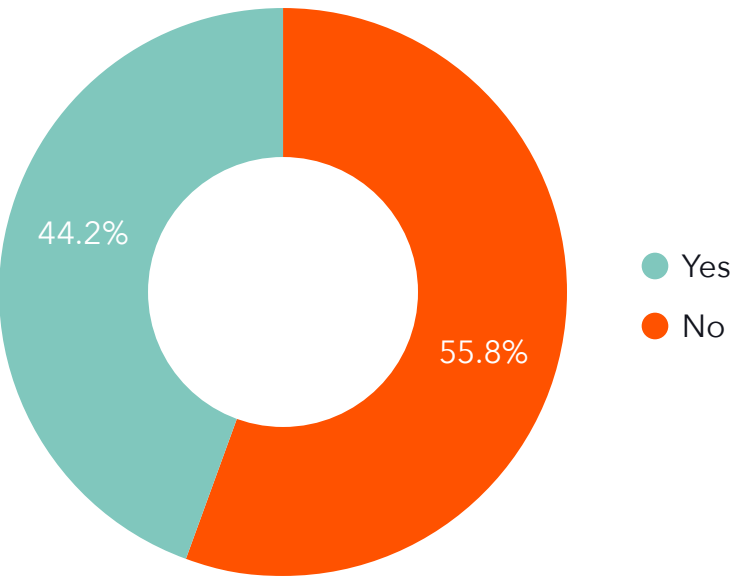
Respondents by **gender**



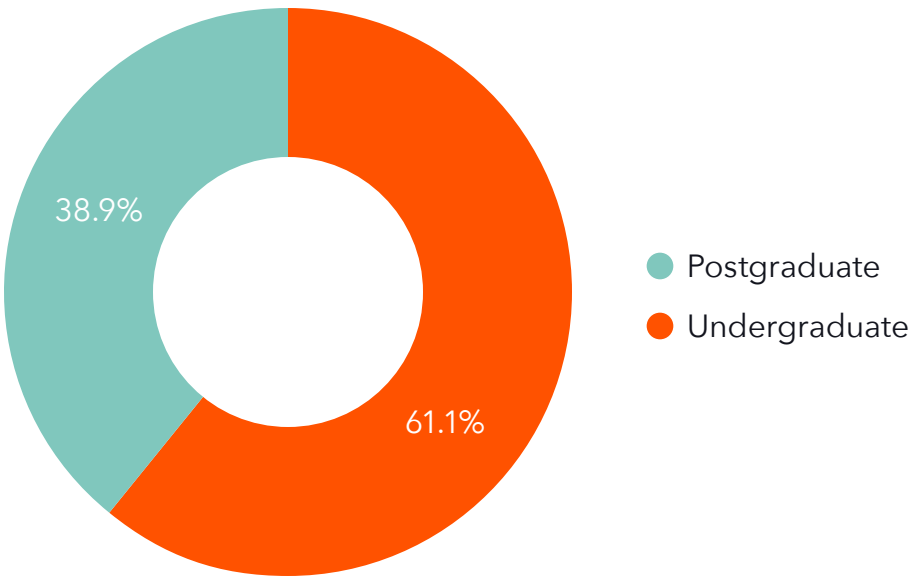
Respondents by **disability**



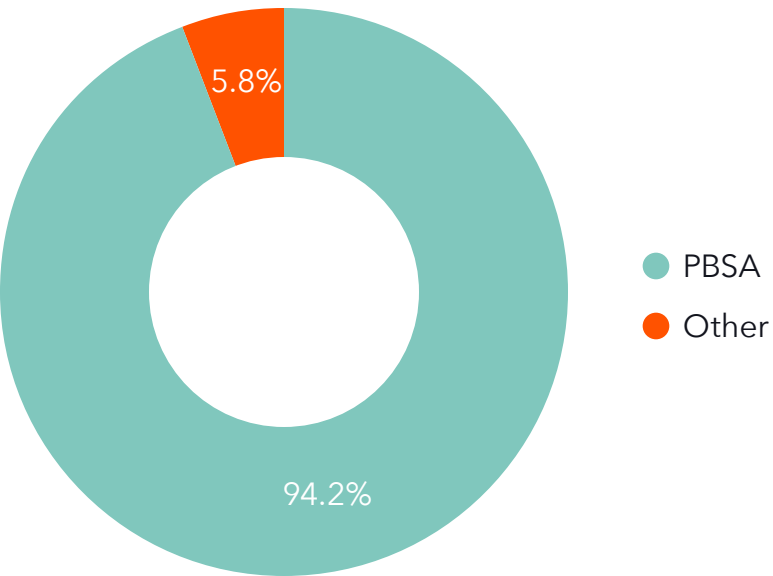
Respondents by **international status**



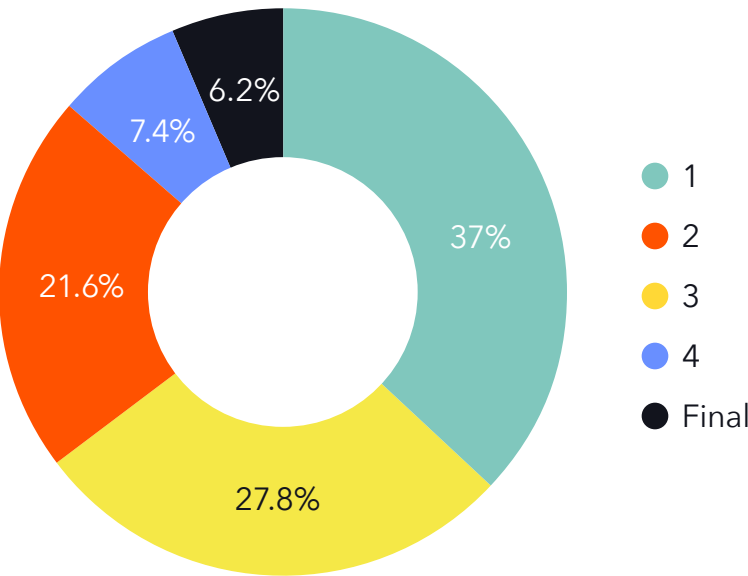
Respondents by **student type**



Respondents by **accommodation type**



Respondents by **undergraduate year of study**



Germany



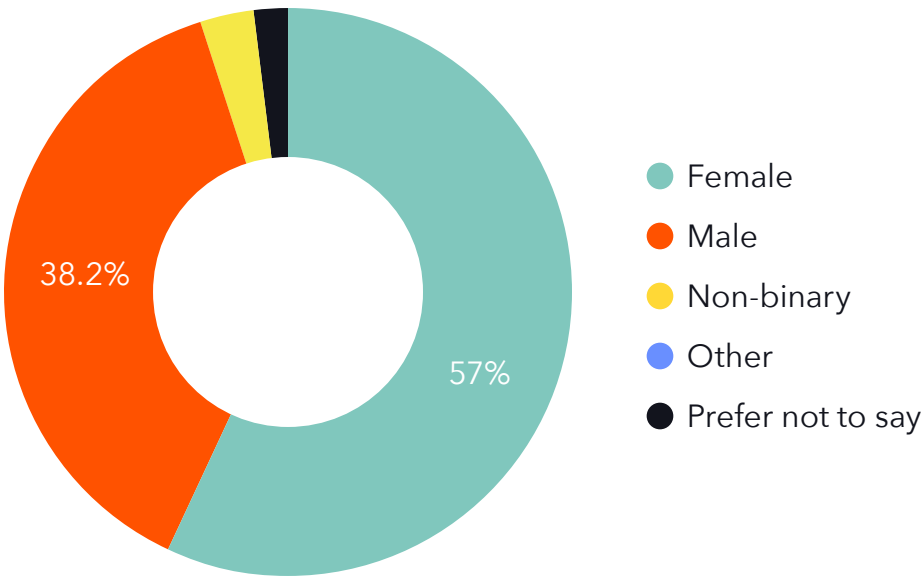
Germany provides tuition-free or low-cost education, excellent research opportunities, and a vibrant student community, but recent years, Tier -1 student cities are becoming less affordable. Nevertheless, Germany has the highest average MHI-5 score on this survey, indicating it to be an inviting country for student well-being.

Respondents: **165**

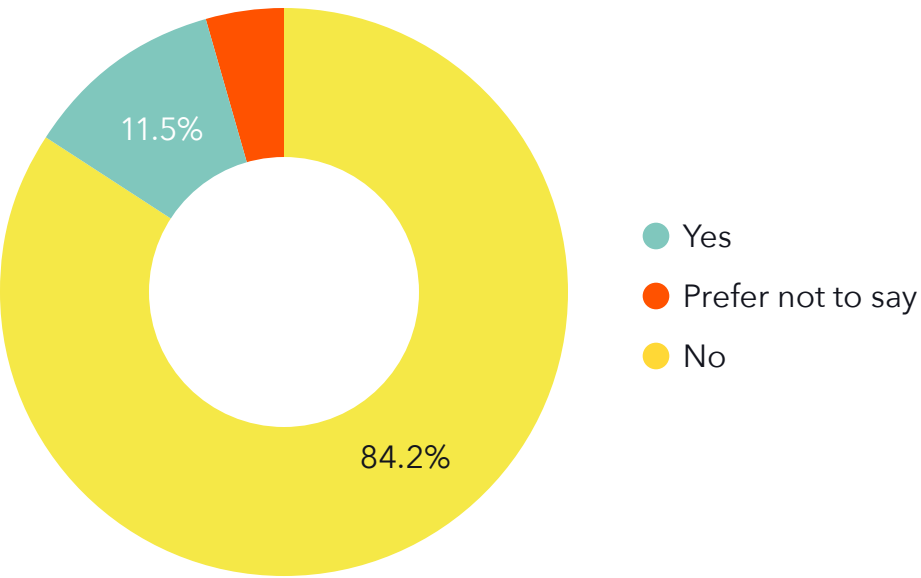
Modal monthly rent range: **€600 - €800**

Employment: **50% reported having a job**

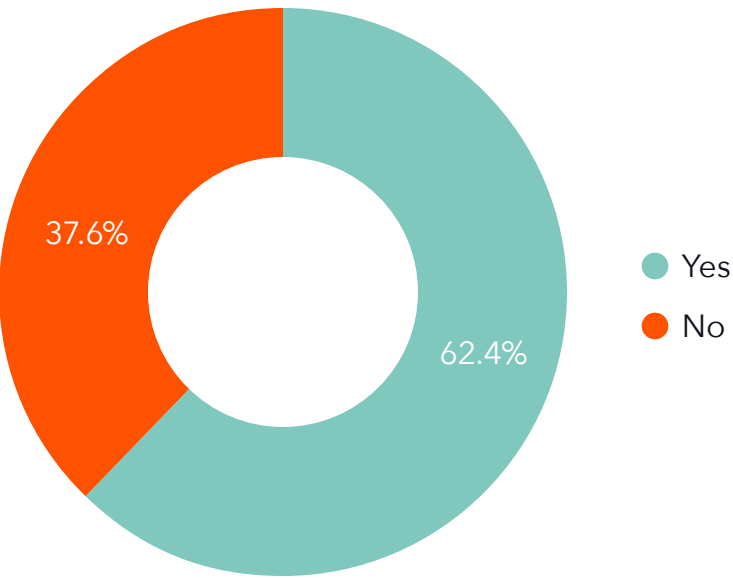
Respondents by **gender**



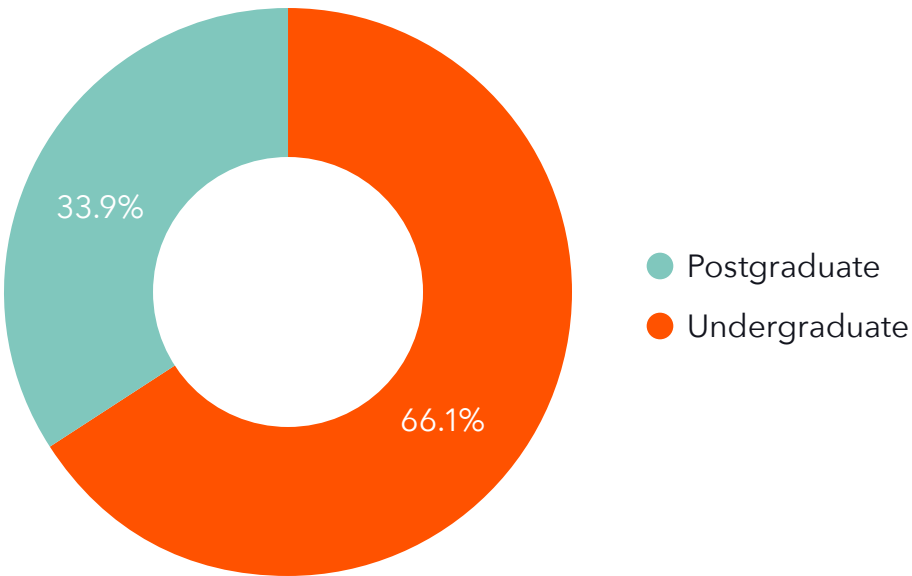
Respondents by **disability**



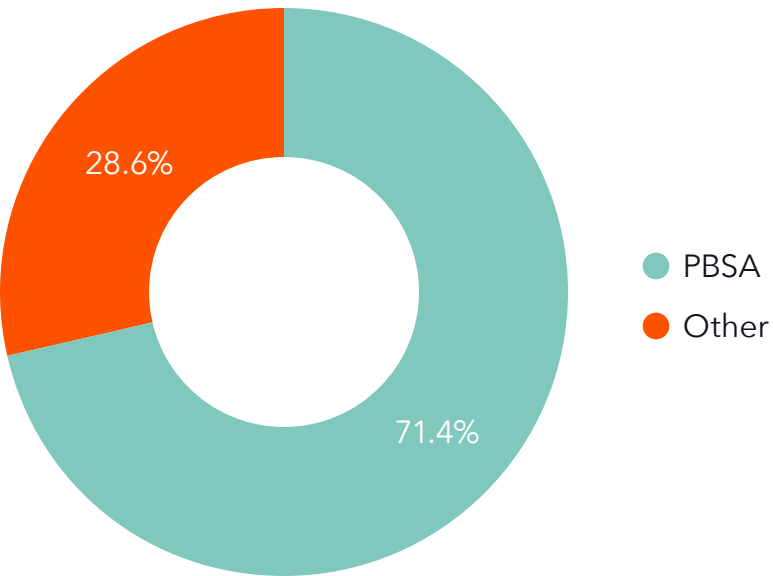
Respondents by **international status**



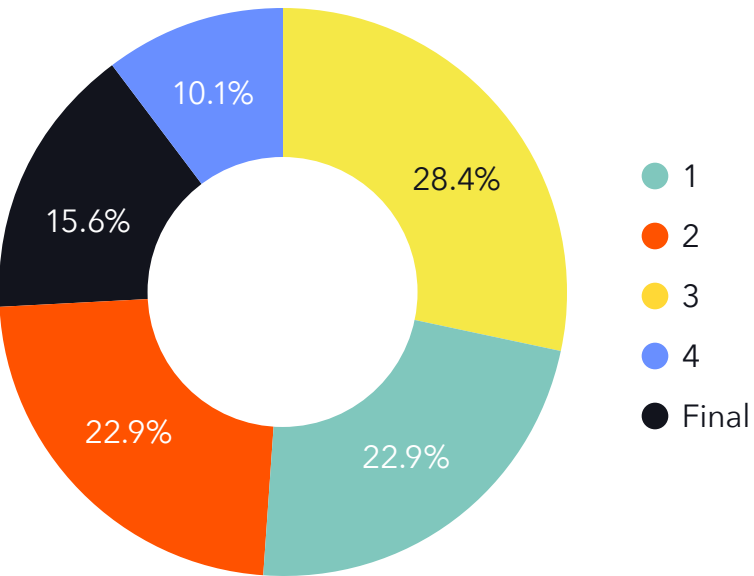
Respondents by **student type**



Respondents by **accommodation type**



Respondents by **undergraduate year of study**



Iceland



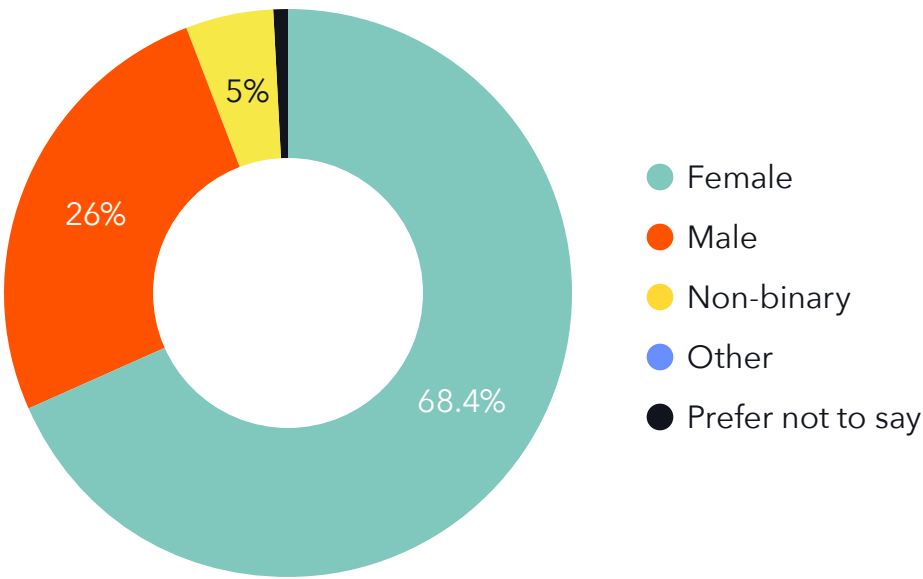
Iceland offers a unique study environment with a focus on sustainability and natural sciences. Students that are fortunate enough can secure accommodation in reputable university halls but housing provision outside of their 'family home' is limited to high-end stock.

Respondents: **323**

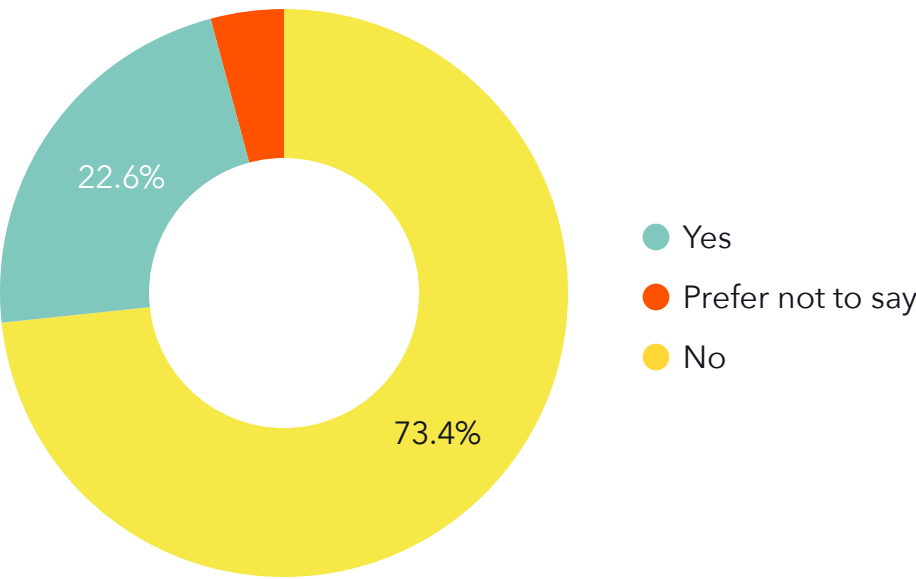
Modal monthly rent range: **€800 - €1000**

Employment: **64% reported having a job**

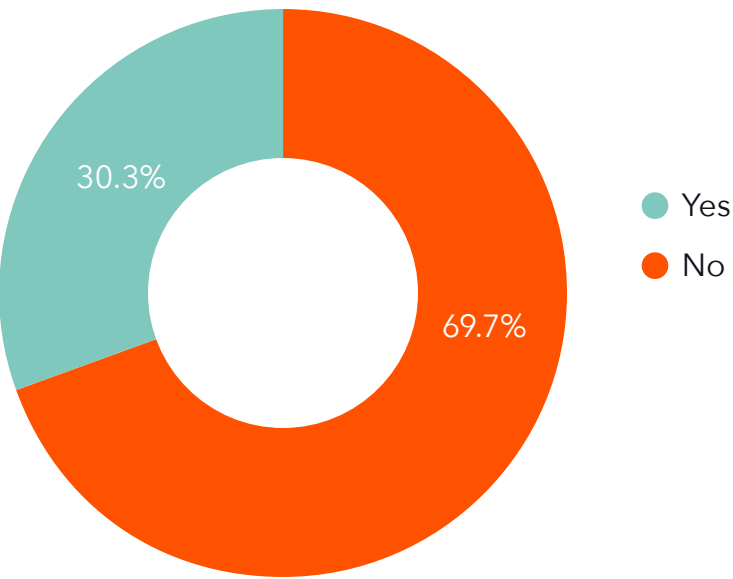
Respondents by **gender**



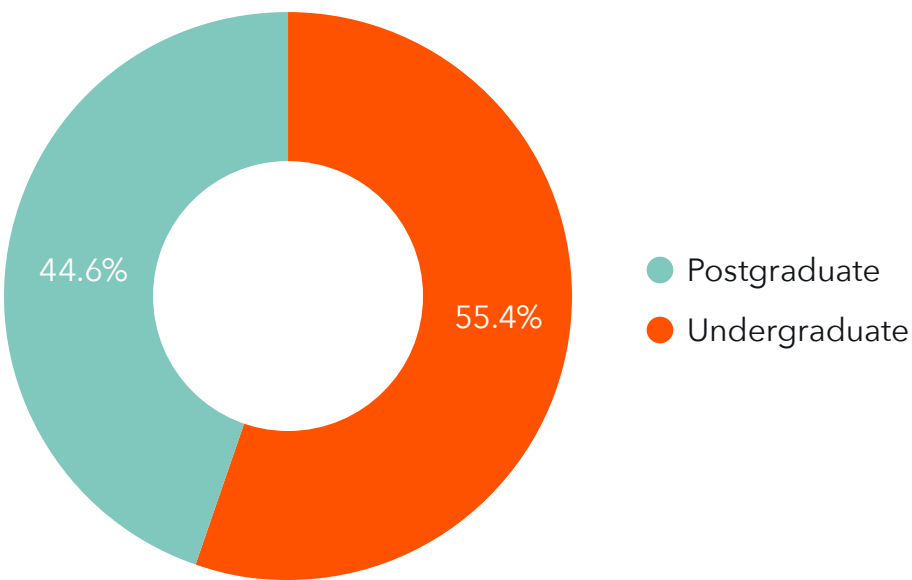
Respondents by **disability**



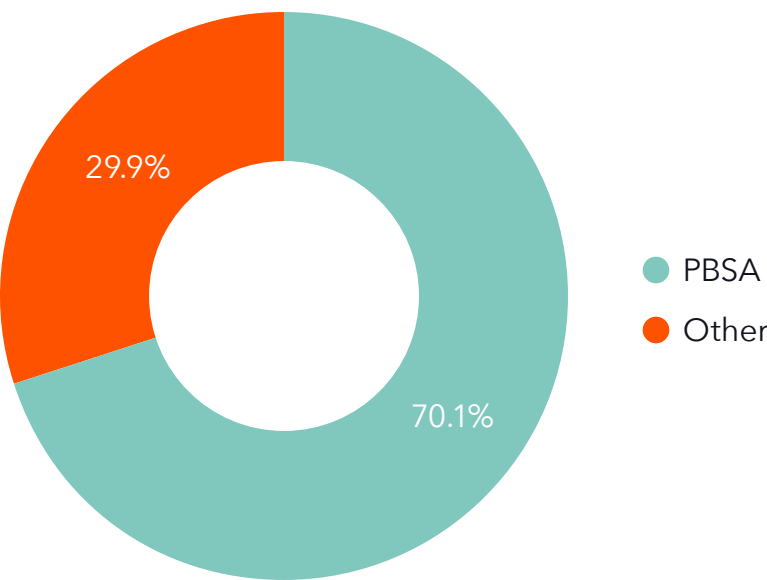
Respondents by **international status**



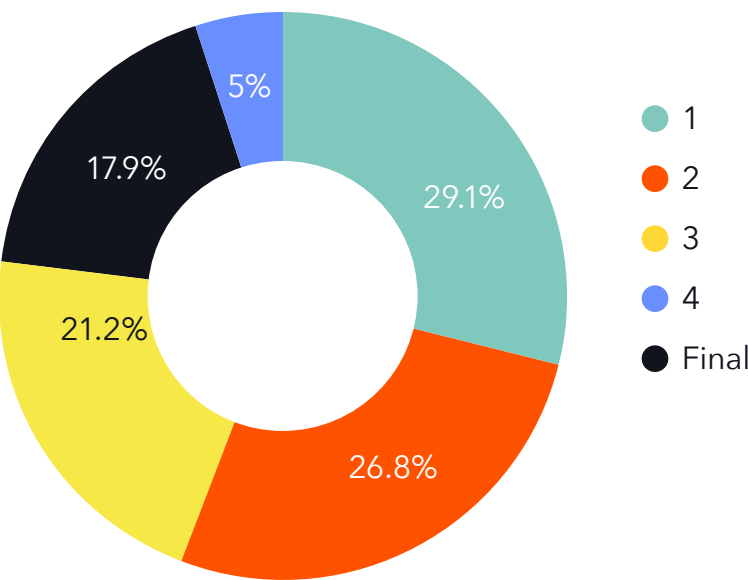
Respondents by **student type**



Respondents by **accommodation type**



Respondents by **undergraduate year of study**



Italy



Italy offers a unique blend of history, art, and academic excellence, but bureaucratic processes and language barriers can pose challenges for international students. Moreover, issues surrounding the cost-of-living in major cities such as Rome and Milan for the local students have led to nationwide protests.

Respondents: **234**

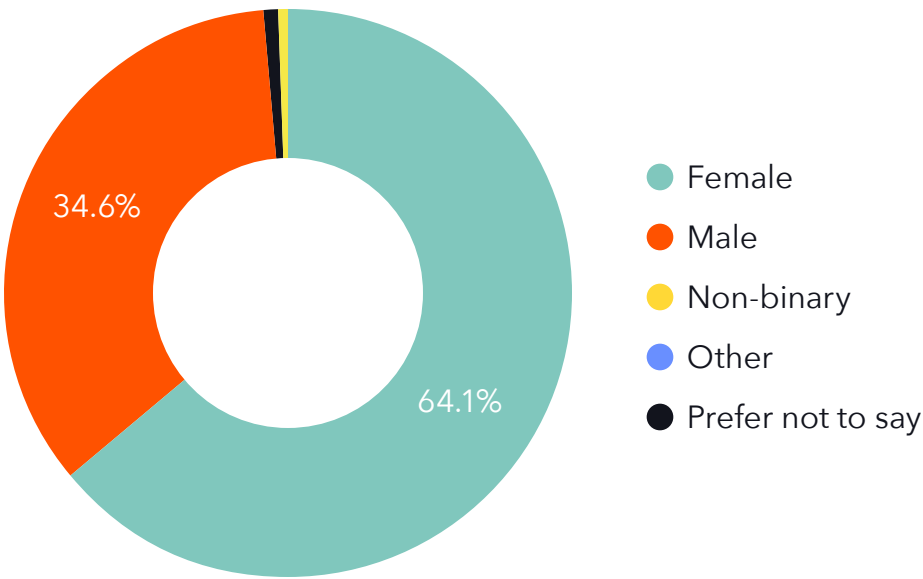
Modal monthly rent range: **€400 - €600**

Employment: **80% reported not having a job**

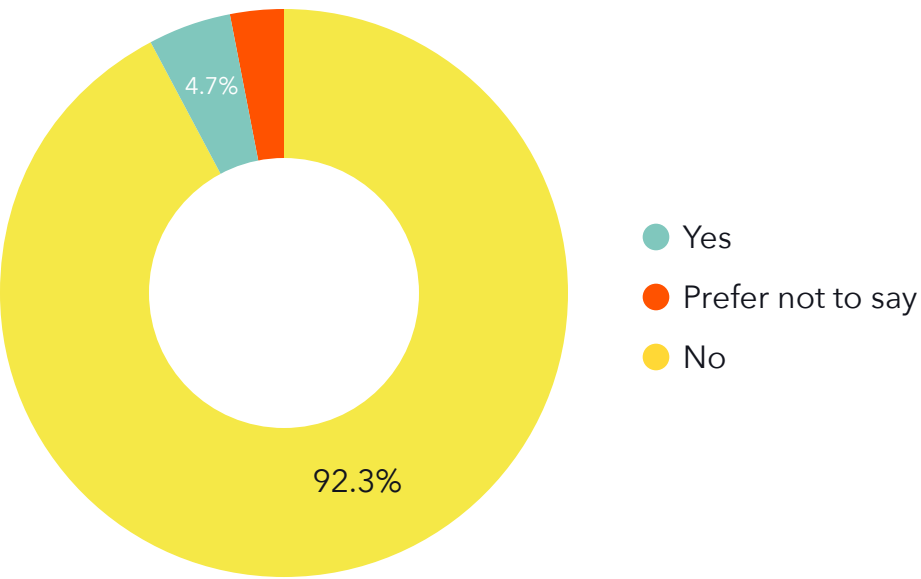
Stand-out availability and use of facilities: **Cafe, community kitchen, shared outdoor space, gym, study areas**

Stand-out availability and engagement with services: **Room cleaning, rentable facilities**

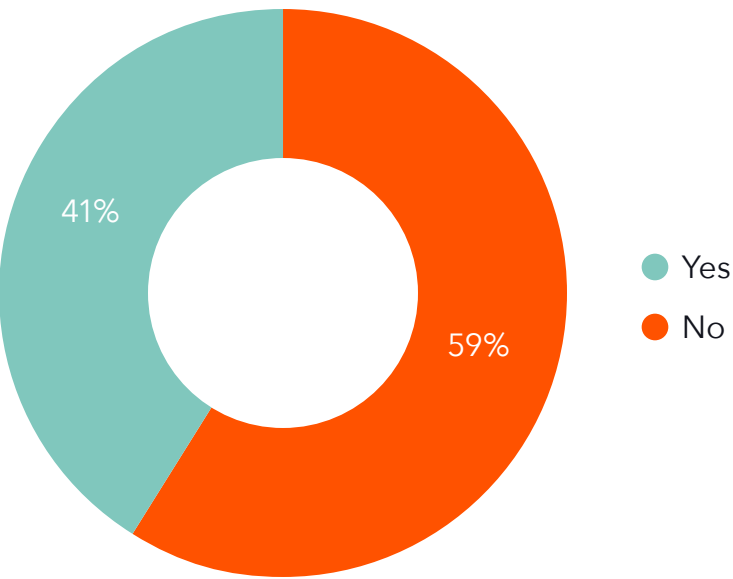
Respondents by **gender**



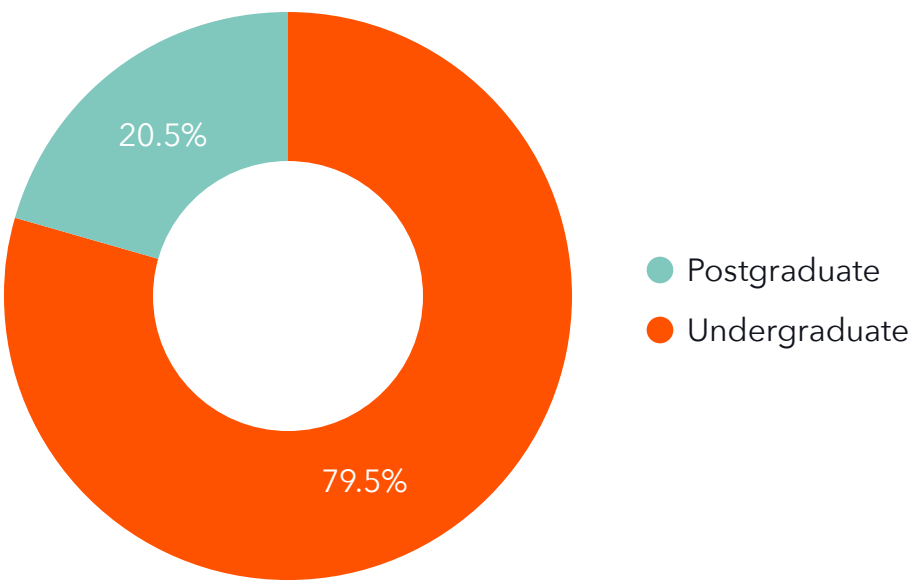
Respondents by **disability**



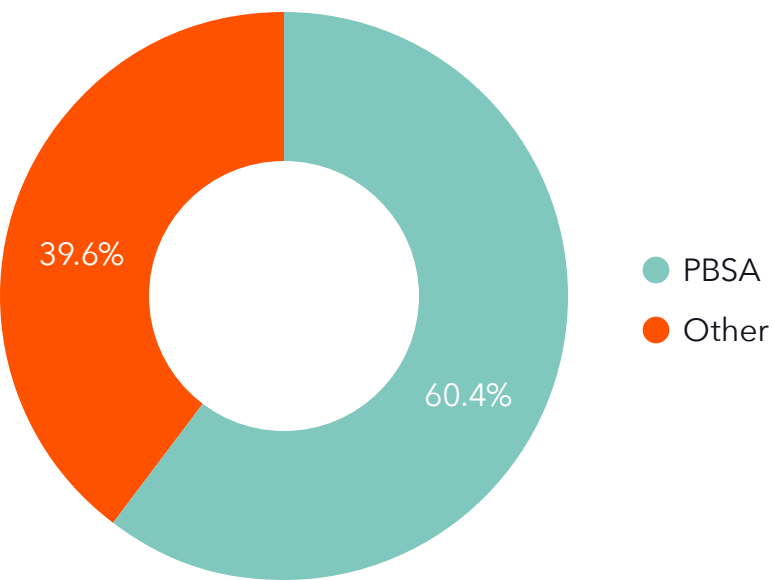
Respondents by **international status**



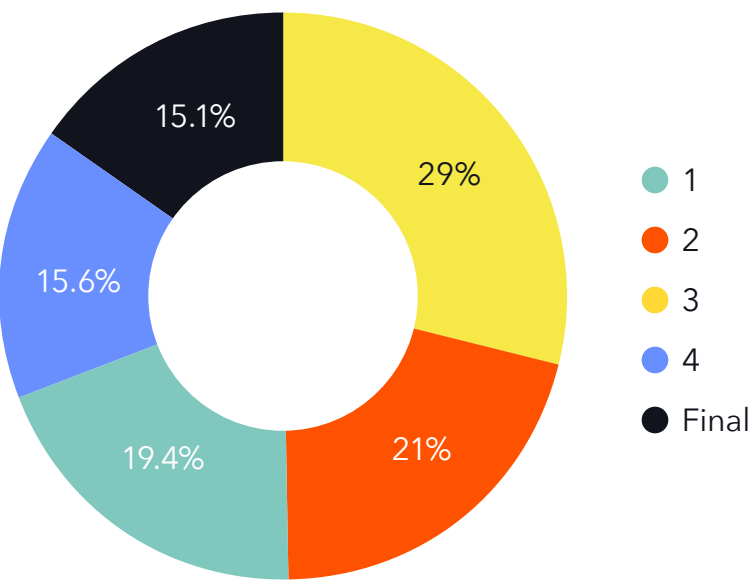
Respondents by **student type**



Respondents by **accommodation type**



Respondents by **undergraduate year of study**



Netherlands



The Netherlands offers a wide range of English-taught programs, a bike-friendly environment, and a multicultural society, but affordable housing can be a concern in popular cities. To combat the growing demand for housing, the government has pushed for limiting international student numbers.

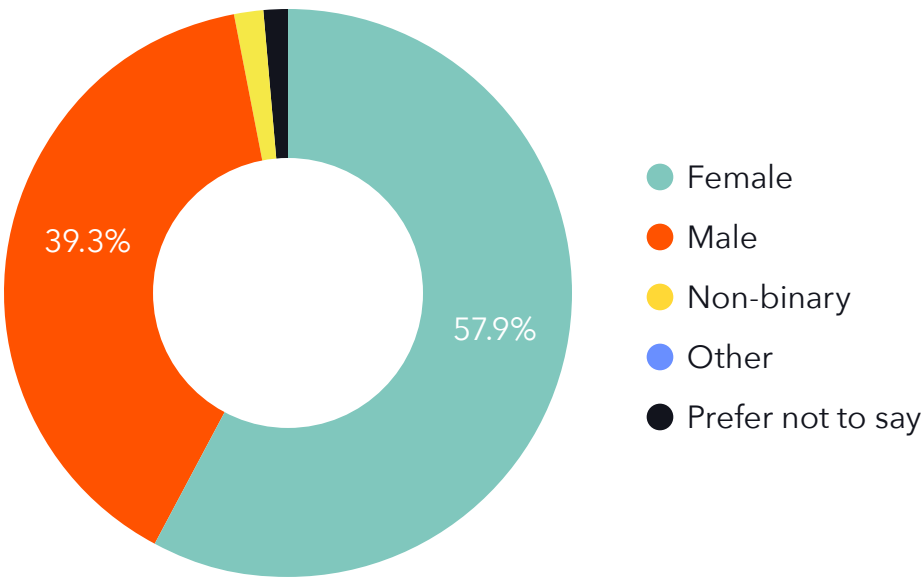
Respondents: **183**

Modal monthly rent range: **€800 - €1000**

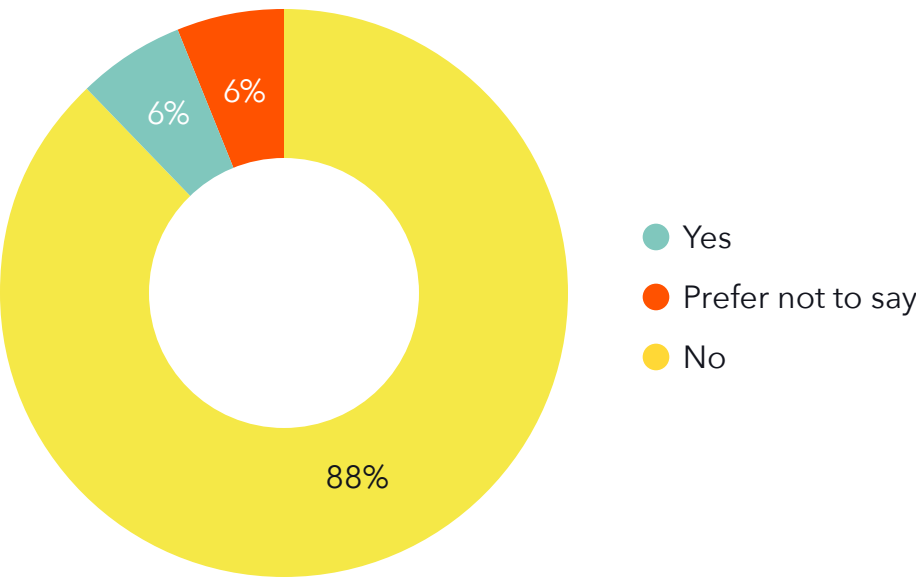
Stand-out availability and use of facilities:
Community kitchen, restaurant, shared bikes, cafe, community lounge/games, study areas, gym

Stand-out availability and engagement with services: **Organised community events, mental health services, room cleaning**

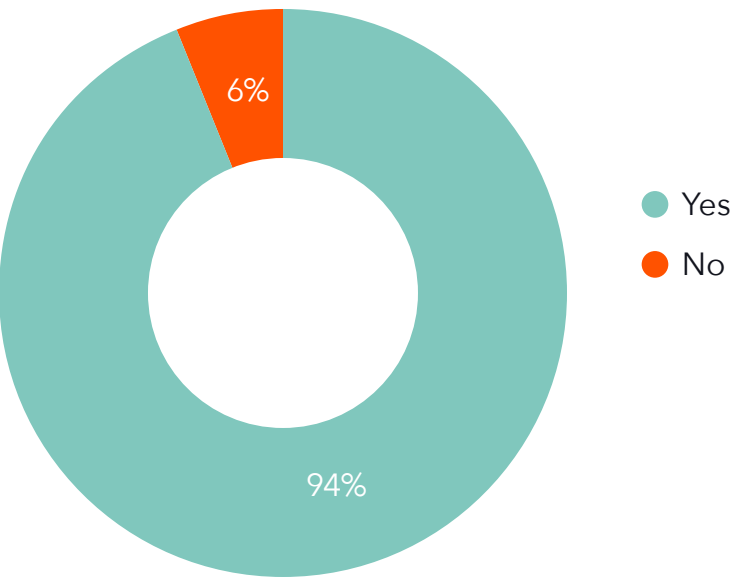
Respondents by **gender**



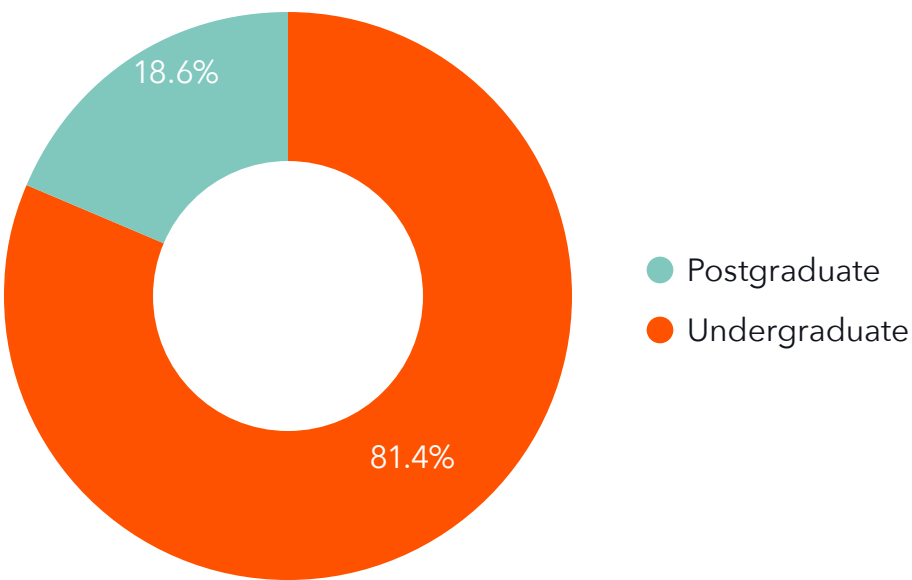
Respondents by **disability**



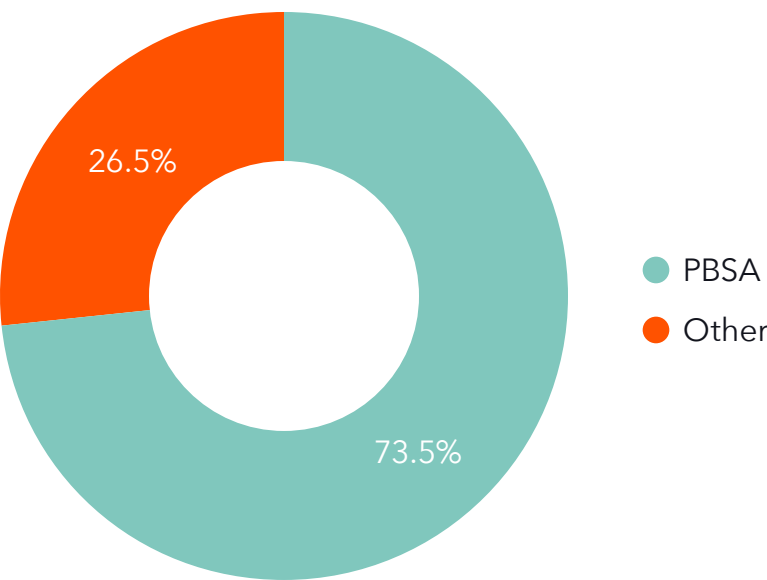
Respondents by **international status**



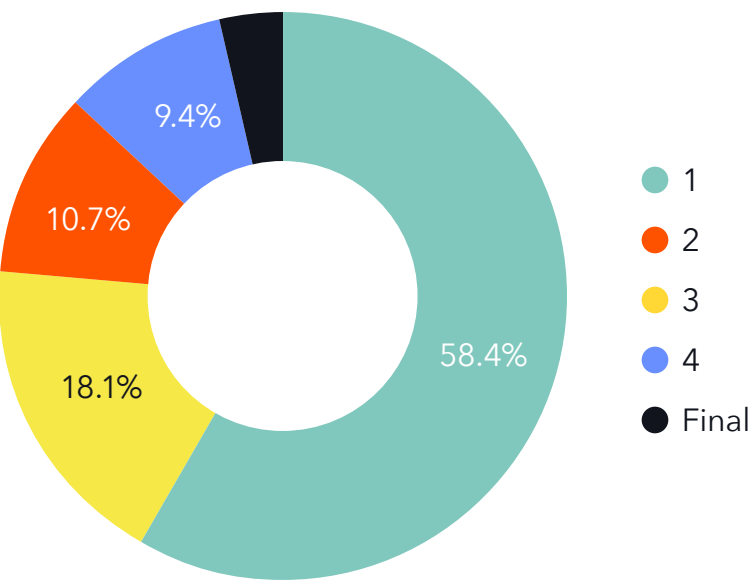
Respondents by **student type**



Respondents by **accommodation type**



Respondents by **undergraduate year of study**



Portugal



Portugal’s universities are gaining international recognition, coupled with a relatively lower cost of living. Recent housing pressures caused by the country’s increasing popularity as a study destination have started to push the market for private-rented accommodation up in major cities.

Respondents: **158**

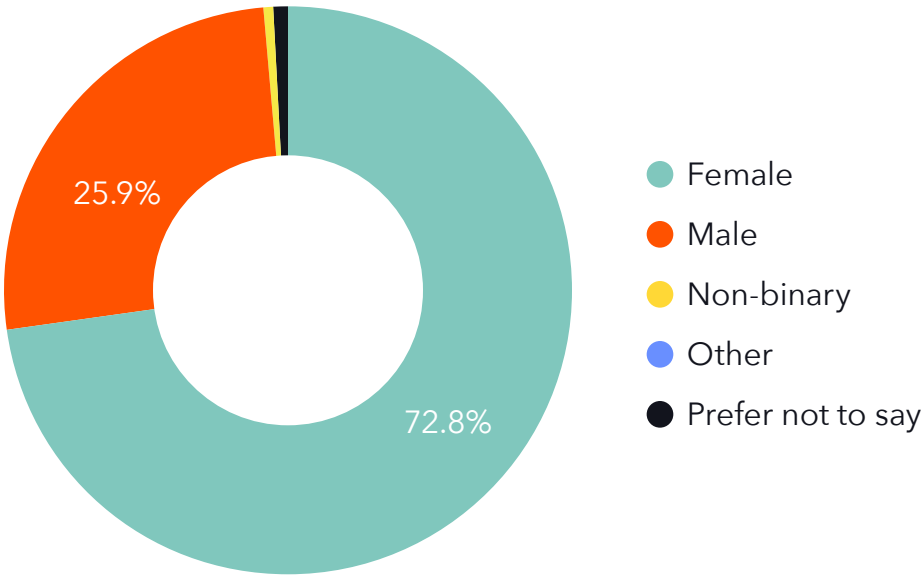
Modal monthly rent range: **€600 - €800**

Employment: **84% reported not having a job**

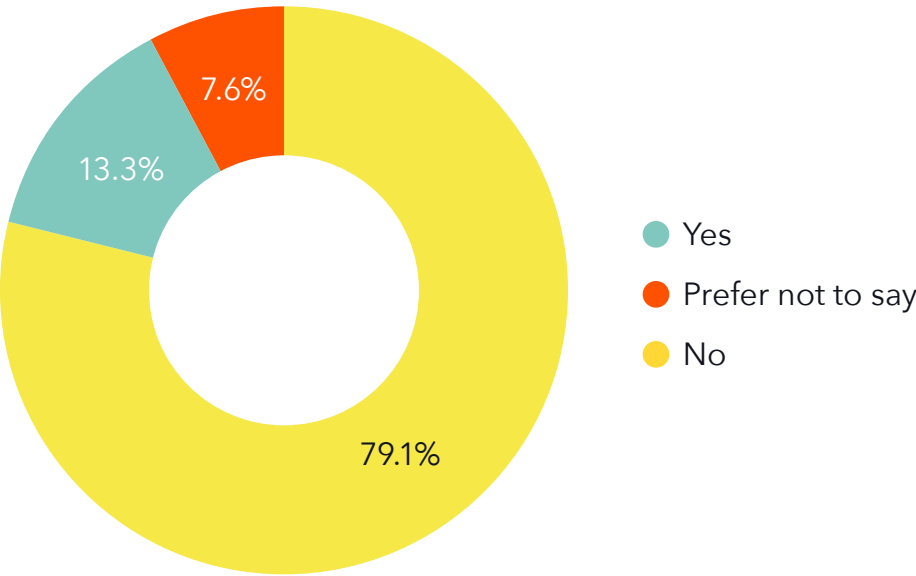
Stand-out availability and use of facilities: **Swimming pool, study areas, community lounge/games, shared outdoor space, gym, cinema, bookable shared spaces**

Stand-out availability and engagement with services: **Organised community events, mental health services**

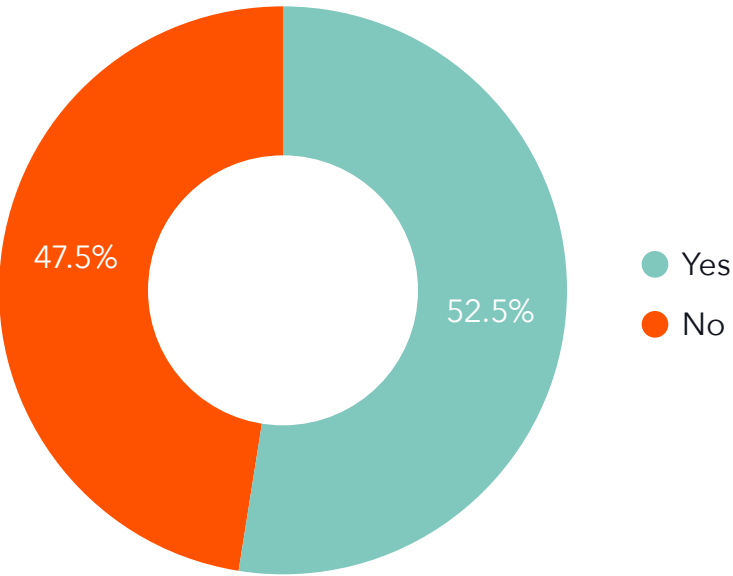
Respondents by **gender**



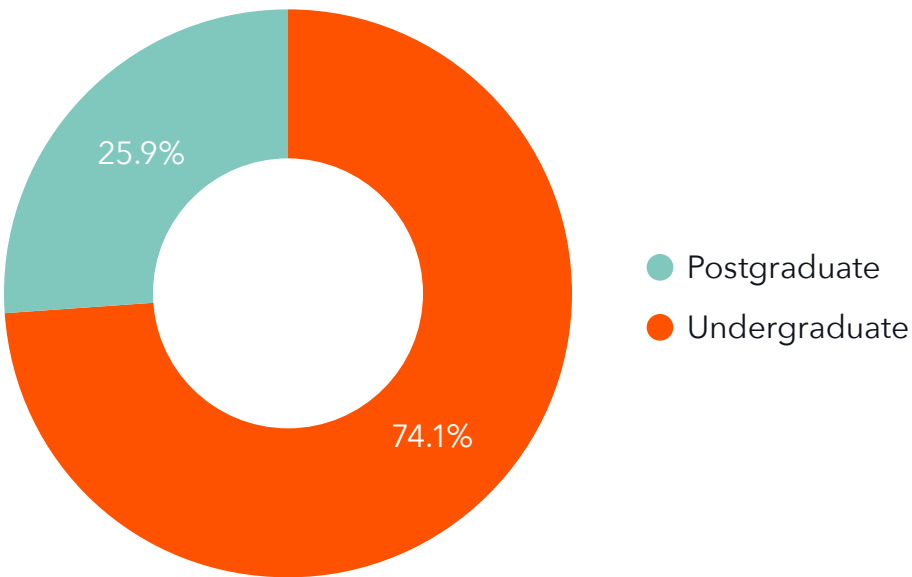
Respondents by **disability**



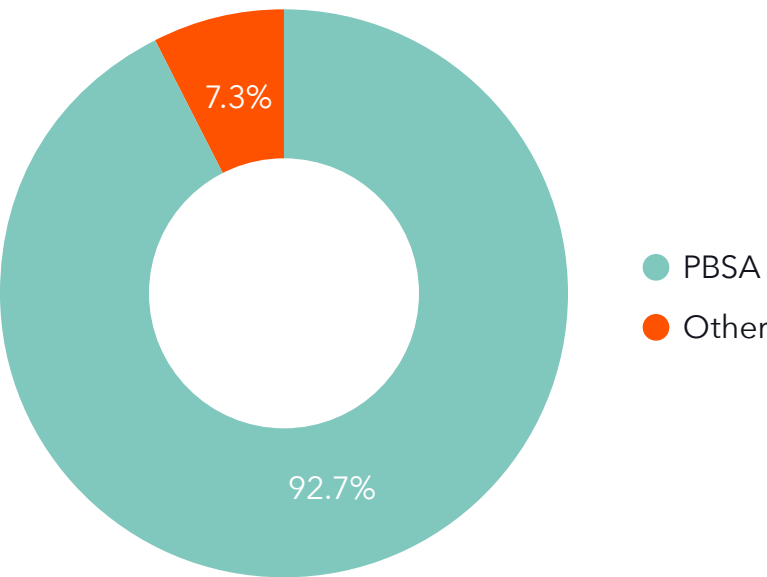
Respondents by **international status**



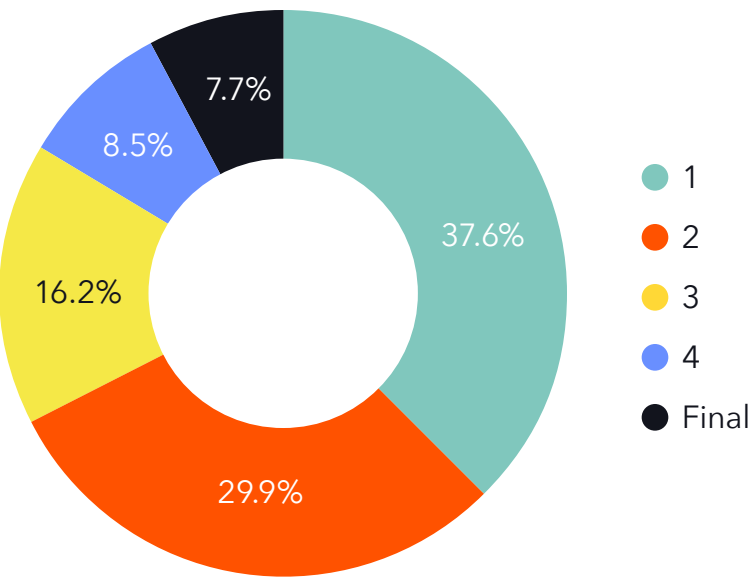
Respondents by **student type**



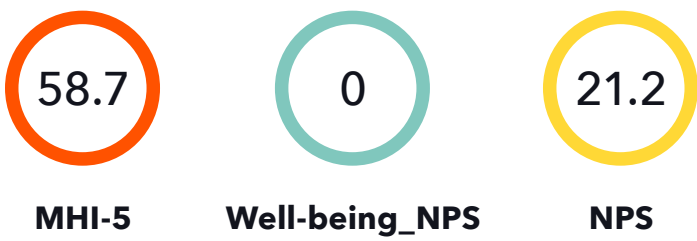
Respondents by **accommodation type**



Respondents by **undergraduate year of study**



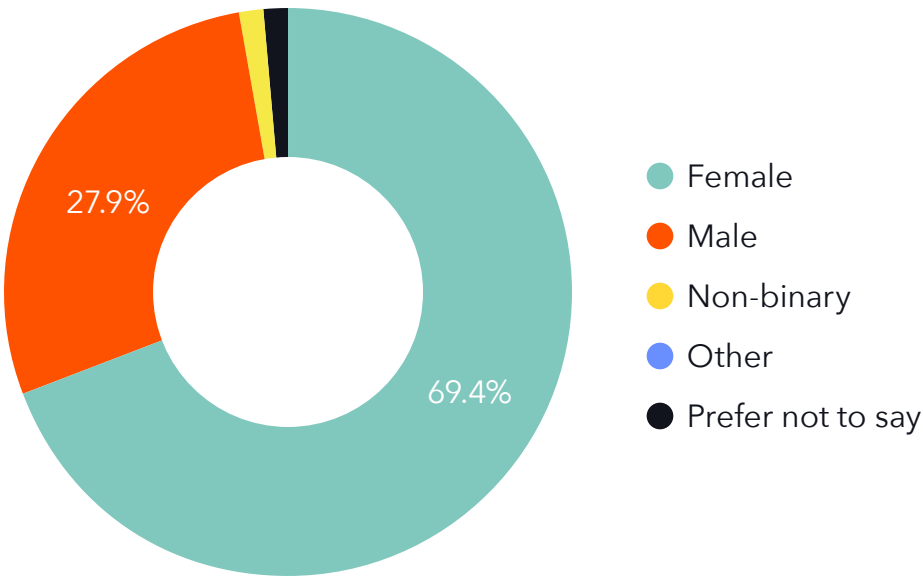
Spain



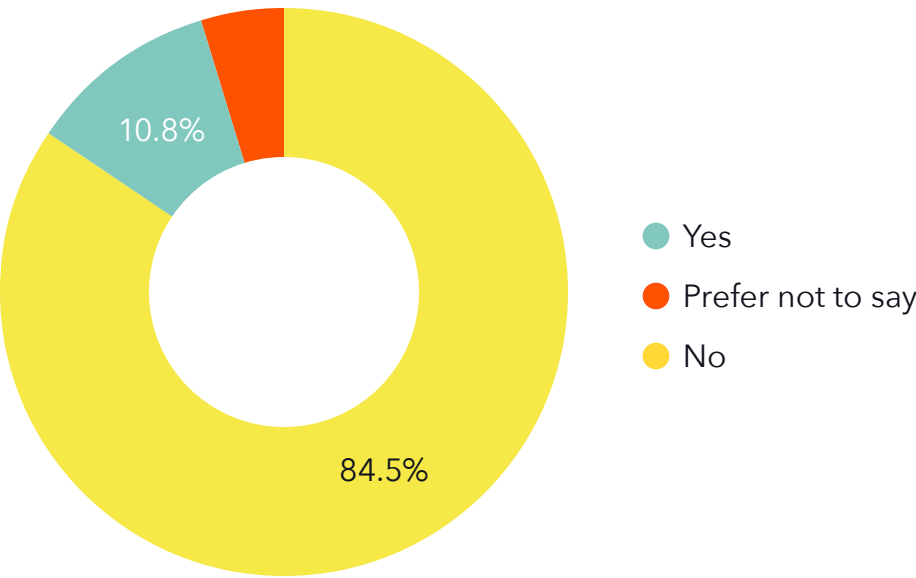
Spain provides a relaxed lifestyle, a Mediterranean climate, and a lively social scene. Recent years have seen a growth in private purpose-built student accommodation, but religious and educational institution-owned buildings remain the popular choice with their all-inclusive, catered services.

Respondents: **297**
Modal monthly rent range: **€600 - €800**
Employment: **84% reported not having a job**
Stand-out availability and use of facilities: **Swimming pool, study areas, community lounge/games, shared outdoor space, gym, cinema, bookable shared spaces**
Stand-out availability and engagement with services: **Organised community events, mental health services, room cleaning, career/job support**

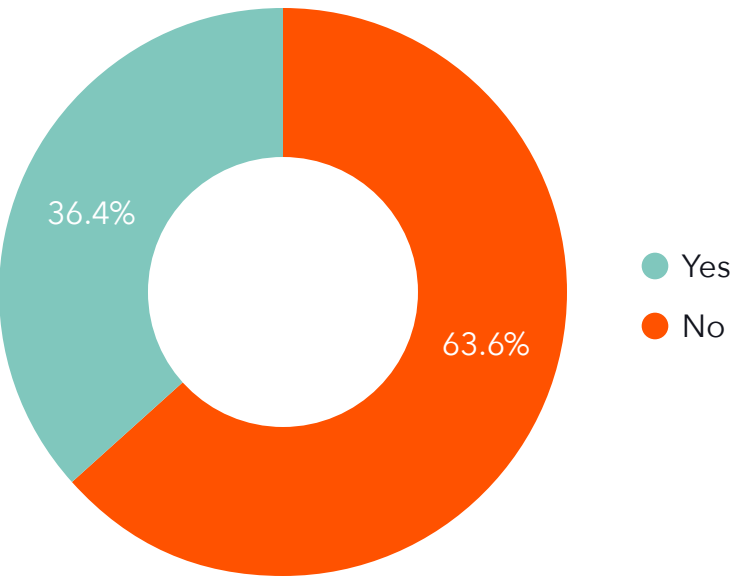
Respondents by **gender**



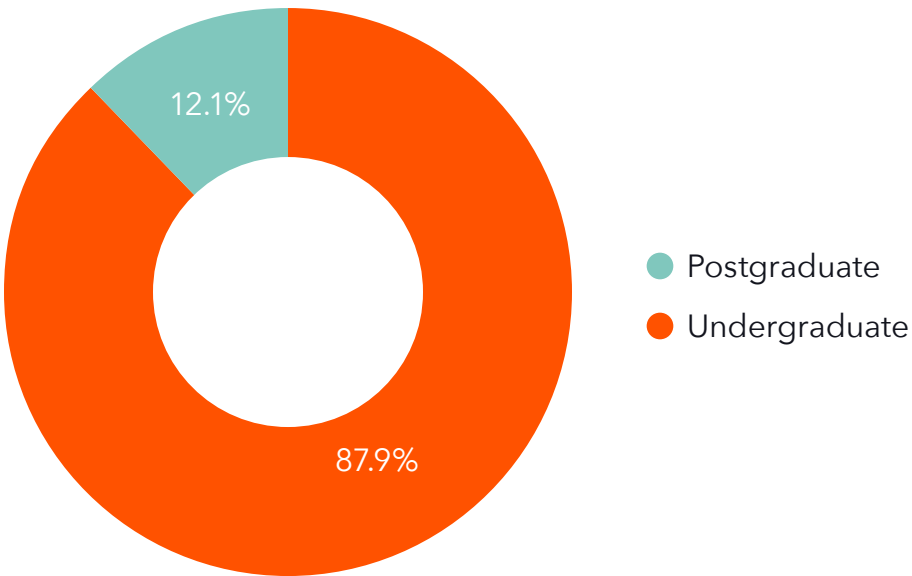
Respondents by **disability**



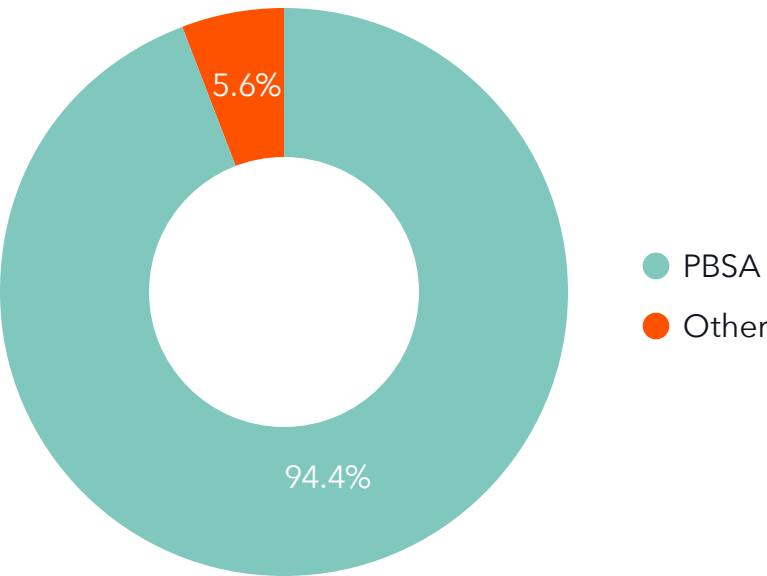
Respondents by **international status**



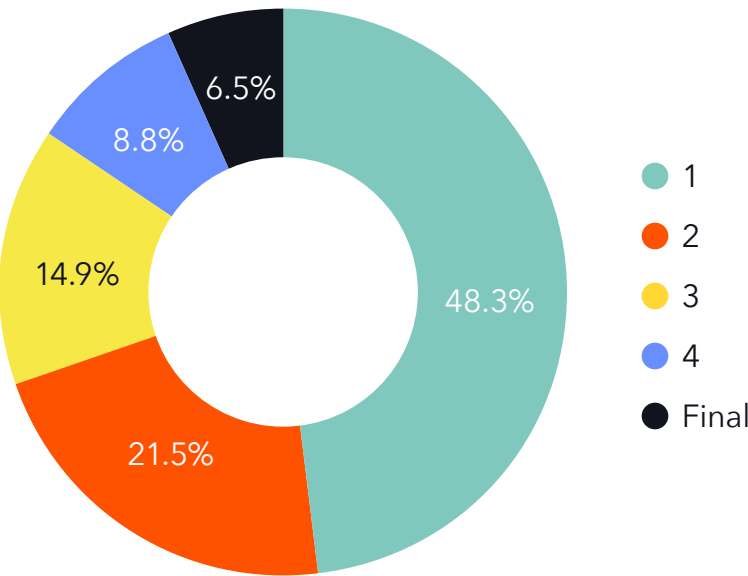
Respondents by **student type**



Respondents by **accommodation type**



Respondents by **undergraduate year of study**



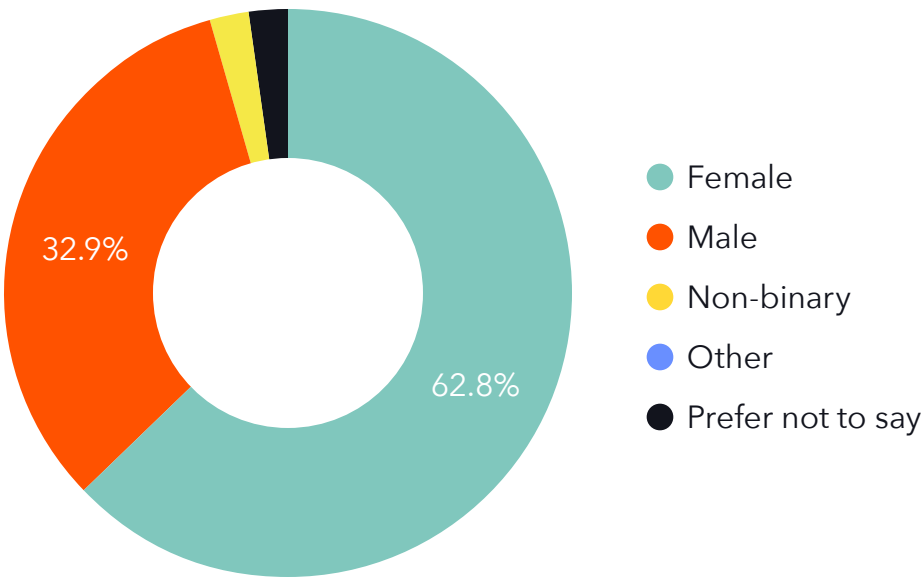
United Kingdom



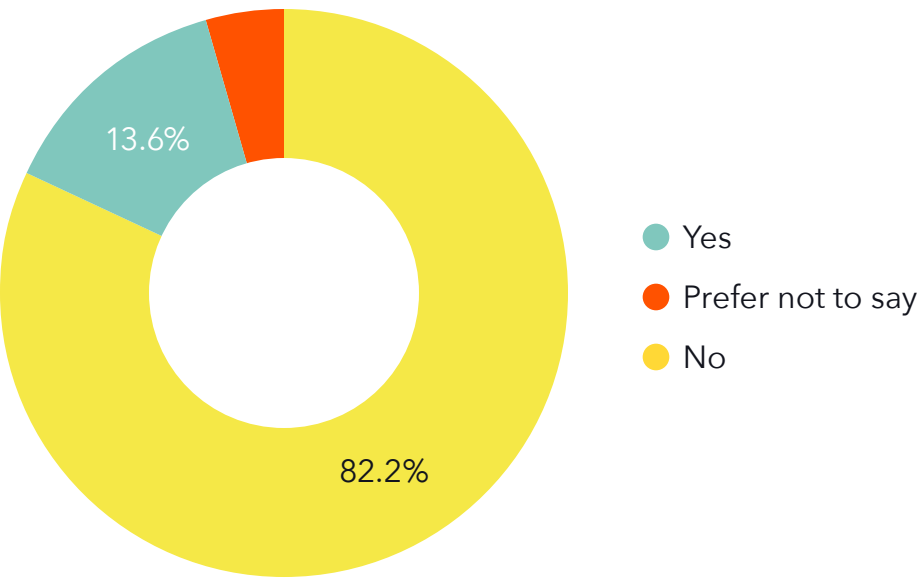
The UK offers a wide range of prestigious universities though tuition fees can be relatively higher than the rest of Europe. The housing supply continues to struggle with accommodating rising student numbers (both domestic and intentional) every year, which is estimated to hit 1 million by 2023.

Respondents: **258**
Modal monthly rent range: **€400 - €600**

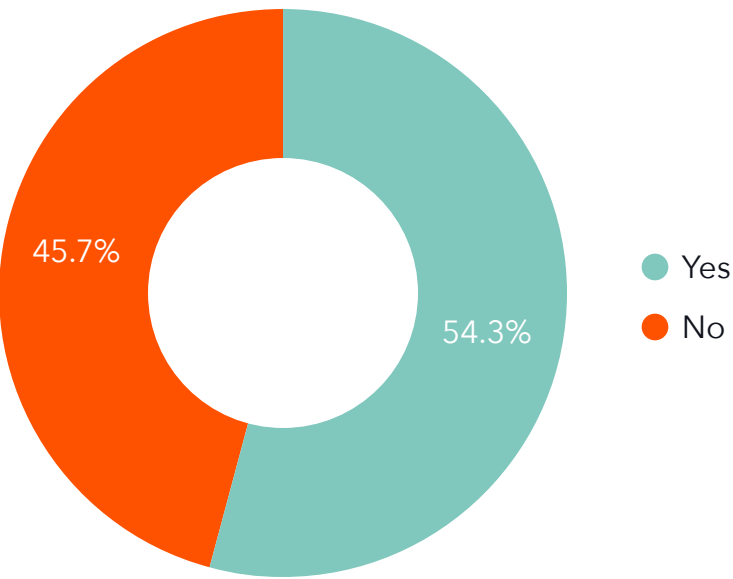
Respondents by **gender**



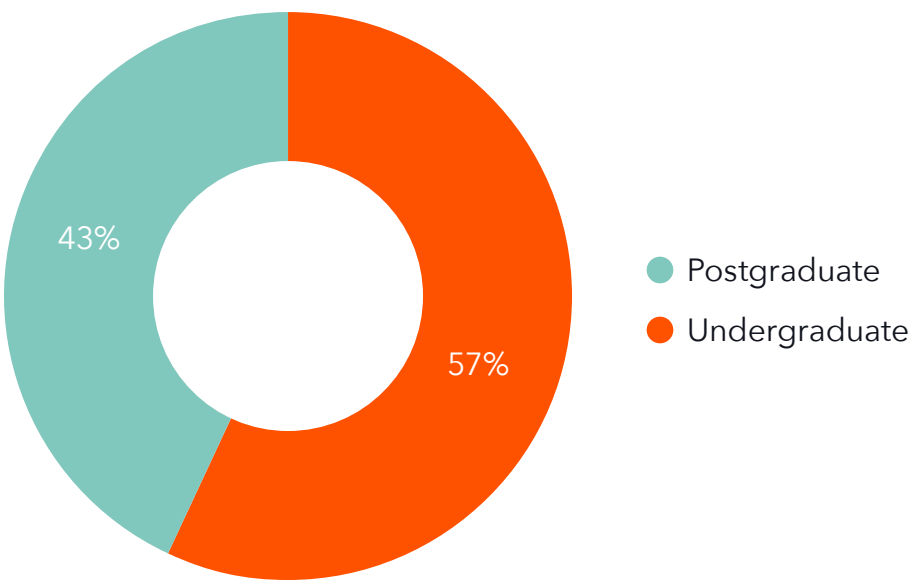
Respondents by **disability**



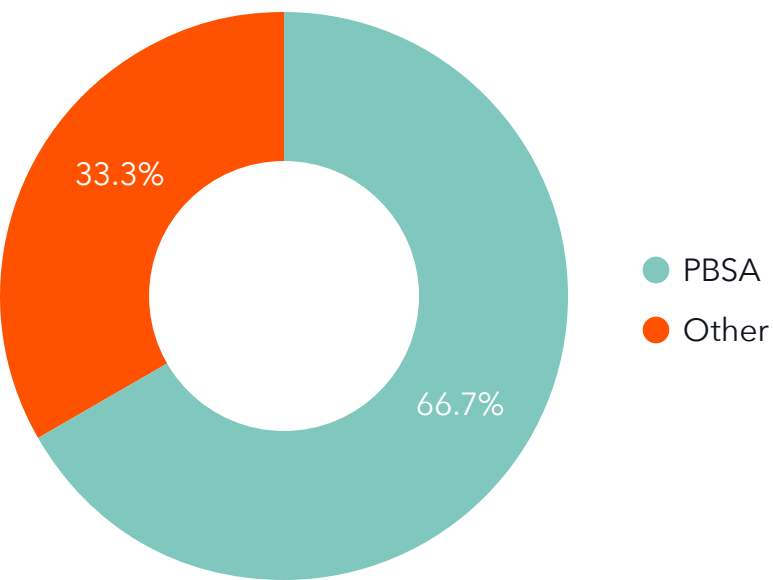
Respondents by **international status**



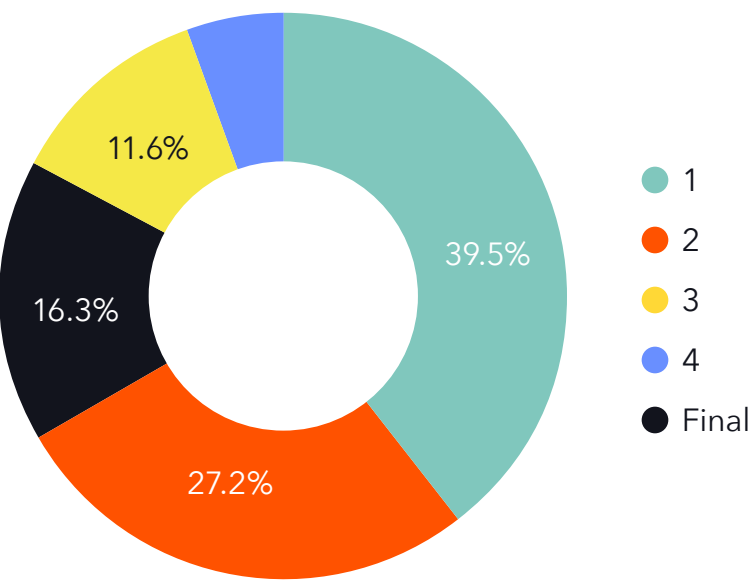
Respondents by **student type**



Respondents by **accommodation type**



Respondents by **undergraduate year of study**



Country Tables

Country scores by room type

	Respondents			Well-being_NPS			Average MHI-5			NPS		
	PBSA	Other	Total	PBSA	Other	Total	PBSA	Other	Total	PBSA	Other	Total
Denmark	502	65	567	-20.7	-35.4	-22.4	59.9	58.5	59.7	13.5	6.2	7.2
Iceland	223	100	323	-39.9	-17.0	-32.8	51.4	57.4	53.2	-4.9	4.0	6.6
Spain	268	-	-	0.4	-	-	59.0	-	-	28.4	-	-
Austria	239	-	-	-27.2	-	-	61.5	-	-	-12.1	-	-
France	248	-	-	-31.0	-	-	53.3	-	-	-13.3	-	-
UK	189	69	258	-27.0	-13.0	-23.3	51.7	55.9	52.8	-3.2	-13.0	-5.8
Belgium	213	-	-	-36.6	-	-	54.9	-	-	-27.2	-	-
Italy	170	64	234	-10.6	-17.2	-12.4	61.8	58.3	60.8	18.2	0.0	13.2
Netherlands	157	-	-	0.6	-	-	58.4	-	-	10.8	-	-
Germany	126	-	-	-12.7	-	-	61.5	-	-	0.8	-	-
Portugal	139	-	-	1.4	-	-	56.7	-	-	26.6	-	-
EU	2,662	702	3,364	-21.8	-13.5	-20.0	57.3	55.5	57.0	-1.3	-2.8	-1.6

Distribution of monthly rents

- I don't pay rent

Less than €400

€400 - €600

€601 - €800

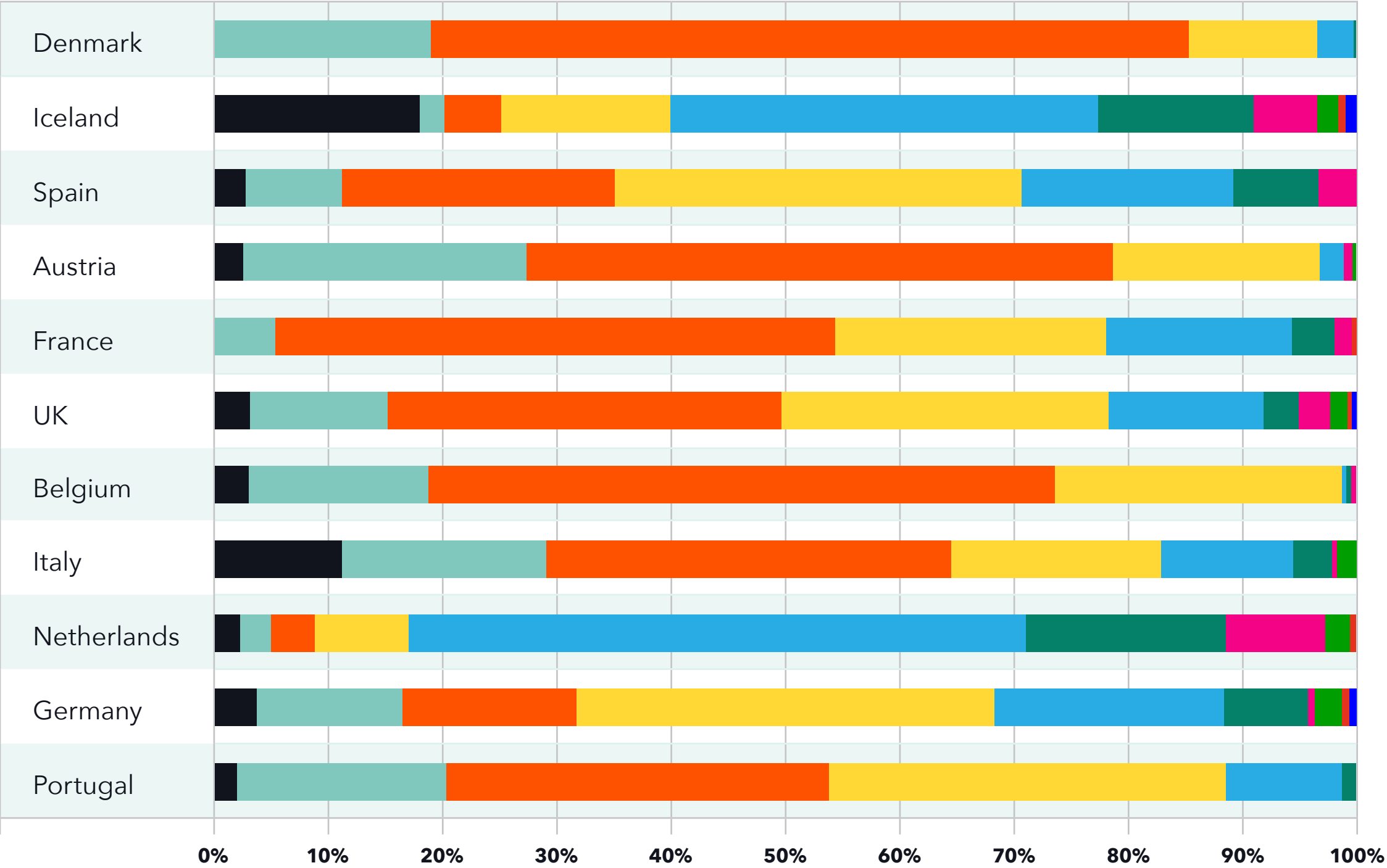
€801 - €1,000
- €1,001 - €1,200

€1,201 - €1,400

€1,401 - €1,600

€1,601 - €1800

€1,801 - €2,000



Research Methodology

The research was conducted between 22 March 2023 and 16 June 2023, working in collaboration with accommodation providers, operators, and partners across Europe. Participating organisations were able to start and end their own research efforts at their own discretion, during the time window.

The survey was facilitated by **WAU Agency**, in partnership with **The Class Foundation** and hosted on the online platform Typeform across five different languages (English, French, Spanish, Italian, German).

Where fewer than 50 responses were achieved to each element of a question, responses have been suppressed.

Sarah Jones of Mirus⁴² was responsible for analysis, and report creation.

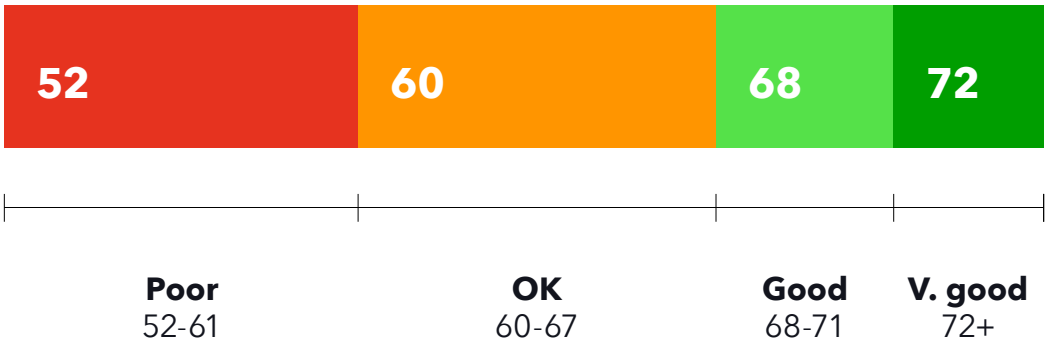
Scoring methodologies of MHI-5

The Mental Health Inventory is a five-question subscale of the general health measure SF-36. The MHI-5 includes questions referring to both positive and negative aspects of mental health, and questions referring to both depression and anxiety.

In the past month, how much of the time...

- were you a happy person?
- have you felt calm and peaceful?
- have you been a very nervous person?
- have you felt downhearted and blue?
- have you felt so down in the dumps that nothing could cheer you up?

MHI-5 = 100 * ((SUM OF ALL 5 SCORES) - 5) / 25

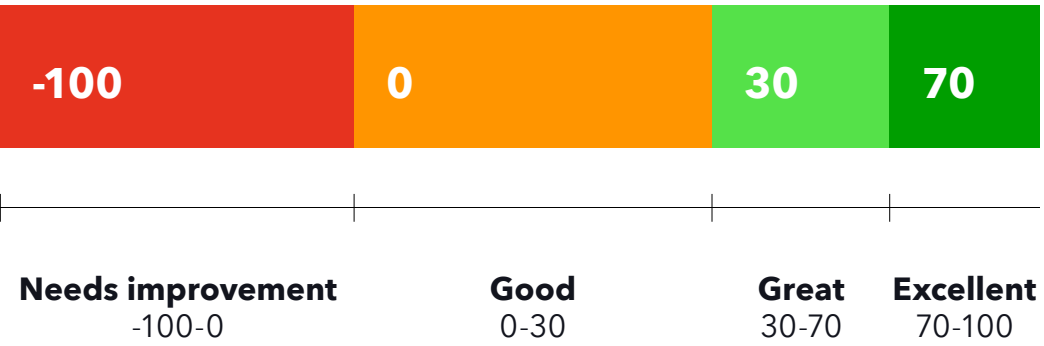


Scoring methodologies of NPS

Respondents are asked to rate impact of living environment on mental well-being and the likelihood of them recommending their accommodation to others.

- **Detractors**
Rate you 0-6, are not particularly satisfied by your service, require proactive outreach to mitigate brand damage.
- **Passive**
Rate you 7-8, are susceptible to competitive offerings, are left out of NPS calculation.
- **Promoters**
Rate you 9-10, are loyal customers, fuel viral growth through word of mouth.

NPS = %PROMOTERS - %DETRACTORS



Acknowledgements

Survey Practitioners

WU for the survey question development, hosting scripting, analysing and creating a dashboard for reviewing results scores.

Mirus⁴² for survey question development, further analysis and reporting.

Participant Organisations

All the operators and research partners, **Erasmus Student Network**, **Student.com** and **University Living**, who sent the survey out to their students, thank you for your support and your efforts.

Internal Team

Arunima Dey for project management and drive.

Kelly-anne Watson and **Frank Uffen** for insight, guidance and vision.

Sponsors

Thank you for supporting the project aim and purpose.

Technogym SpA

Consortio Security

Zig Prop Tech B.V.

Eagle Eye Networks

Collaborators

John Appiah for PR strategy.

Craig Cox for branding, website, and report design.

The students

Thank you most of all – without your engagement with this survey, we would not have gained an understanding of what the key issues and impacts are, and how you are feeling. We hope that the findings and policy direction set out in this report gives you hope that the sector is listening.



Endnotes on Mental Health and Well-being

i Measuring Student Well-being using MHI-5

MHI-5 is an international and well-documented measurement of well-being, with good mental health being observed at scores above 60, on a scale between 0 and 100 (optimal mental health).

ii In the Netherlands, the Second Dutch National Survey of General Practice that took place across 104 doctors’ surgeries (with 400,000 registered patients) showed results that were recorded from 9,687 patients, within which the 18-24-year-old population attained a mean MHI-5 score of 80.

Hoeymans, N., Garssen, A.A., Westert, G.P. et al. Measuring mental health of the Dutch population: A comparison of the GHQ-12 and the MHI-5. Health Qual Life Outcomes 2, 23 (2004). <https://doi.org/10.1186/1477-7525-2-23>

Evidence from the UK highlights the increase in mental health issues being reported by students. The UCAS report “Starting the conversation” highlights a number of facts that are significant for our research. 3.7% of all UK applicants declared a mental health condition in 2021, up from 0.7% in 2011.

In the UK, the Office for National Statistics (ONS) conducted a study of first year higher education students in 2021 under the Coronavirus pandemic. Coronavirus and first year higher education students, England - Office for National Statistics. In this study, average life satisfaction for first year students is 6.6 (out of 10), which is similar to the general population of students in England (6.5) (Figure 1). However, average scores are lower than those for 16 to 29-year-olds as a whole (6.9), and statistically significantly lower than the adult population in Great Britain (7.1).

iii Investor in Students™ provides a 360° assessment of students’ experience of living in student accommodation. The accreditation delves far deeper than the performance of the basic bricks and mortar by measuring sentiment across student customers, front-line staff, and senior management to gain an in-depth insight into how operators deliver positive student outcomes. Since inception, the accreditation administrators, WAU Agency, have surveyed 190,697 students and 1,963 employees across all its UK-based members, with ten more universities and accommodation providers due to join for the 2023/24 academic cycle.

iv The BPF Guide on Well-being highlights that it is often student residential practitioners that spot the signs of mental ill-health and distress. The Guide offers practitioners a range of practical measures to support students and staff from a UK PBSA perspective.

British Property Federation (BPF), STUDENT WELL-BEING In Purpose-Built Student Accommodation, June 2019



