amberRadar

UK PBSA PRICING INTEL REPORT

(AY 2026-27)



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Amber's UK PBSA Pricing Report UK (AY 2026-27)

This report is an initiative by ***amber*** to deliver pricing intelligence for the UK's Purpose Built Student Accommodation (PBSA) sector for the academic year 2026–27. It presents a compilation of data-driven insights and real-time market analyses, designed to support PBSA operators in optimizing pricing strategies and maintaining a competitive edge in a dynamic market.

This report decodes analysis of top 10 UK cities by Demand & Supply: **London, Leeds, Liverpool, Nottingham, Birmingham, Sheffield, Manchester, Newcastle, Coventry and Cardiff.**

Notes on Data Analysis & Research Methodology:

For analysis, we have considered the following points -

- Data across 95% of the UK PBSA market, analyzing price and demand shifts & occupancy
- Insights based on 40–52 week tenancy lengths and AY 2025-26 occupancy levels across the top 10 cities.
- Pricing recommendations based on current supply, new beds in the 2026-27 pipeline, and international student demand.
- Room type analysis includes Studios and Ensuites, segmented into Budget, Mid, and Premium categories.
- The pricing insights are derived amber's booking platform. Occupancy and demand trends are analyzed based on PBSA market data.

amber Radar is the umbrella brand for amber's student housing market data intelligence — combining insights derived from amber's proprietary booking platform data and industry analysis, based on 95% of UK PBSA's market coverage. It represents the central source of student housing intelligence, covering topics such as occupancy trends, pricing insights, room-type preferences, visa data demand trends, and overall market performance. This helps operators & partners to steer their business strategies and optimize occupancy levels year-round.

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UK Market Overview 2025-26

The UK market experienced significant shifts in AY 2025-26. UCAS clearances observed a 6% increase in international student numbers, increasing from 60,160 to 63,770, while UK Domestic students increased by 2.4%, from 437,310 to 447,760 as compared to last year.

Sep '25 saw a 10.42% increase as compared to Sep '24 in sponsored study visa clearances for main applicants, up by 7.61% in YTD September 2025 as compared to YTD September 2024.

The UK booking occupancy has been around 96-97% for the past 2 years. However, this year, the overall UK PBSA occupancy was observed at 92.12% as of September 2025, approximately down by 4% as compared to last year's levels.

On the demand side, For AY 2026-27 UK domestic applicants are expected to remain stable. US H-1B restrictions is likely to impact international applicants to UK positively, but the levy on international students may adversely affect numbers. Overall demand is expected to be similar in upcoming academic year as seen in AY 2025-26.

UK Study Visa Clearance Data 2025

YoY% Change UK Sponsored Visa Clearance (as of Sept '25)

Month	2023	2024	2025	2024 vs 2025
January	26,900	25,500	28,700	▲ 12.55%
February	5,200	3,700	6,500	▲ 75.68%
March	7,800	4,800	7,900	▲ 64.58%
April	9,500	9,600	14,800	▲ 54.17%
May	16,900	15,500	18,500	▲ 19.35%
June	38,900	28,200	27,900	▼ -1.06%
July	81,900	69,500	73,500	▲ 5.76%
August	147,100	121,900	120,100	▼ -1.48%
September	83,500	72,000	79,500	▲ 10.42%
Grand Total	**417,700**	**350,700**	**377,400**	**▲ 7.61%**

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Source: GOV.UK, amber Insights

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Google Trends: Keyword Search Volumes (Demand)

Google Keyword Search Volumes: MoM % Change (as of August '25)

City	Jul'25 vs Aug'25 (% Change)	Jul'24 vs Jul'25 (% Change)	Aug'24 vs Aug'25 (% Change)	Apr to Aug'24 vs Apr to Aug'25 % Change
London	▲ 0.20%	▲ 10.41%	▲ 6.00%	▲ 3.33%
Leeds	▲ 31.41%	▼ 20.04%	▼ 0.38%	▼ 1.66%
Liverpool	▲ 44.05%	▲ 1.56%	▲ 5.73%	▲ 3.61%
Nottingham	▲ 59.96%	▼ 4.36%	▲ 7.33%	▲ 4.03%
Birmingham	▲ 21.12%	▼ 17.32%	▼ 26.48%	▼ 19.70%
Sheffield	▼ 3.08%	▼ 3.08%	▲ 3.43%	▼ 1.95%
Manchester	▲ 64.04%	▲ 13.12%	▲ 41.16%	▲ 13.68%
Newcastle	▲ 30.71%	▲ 13.63%	▼ 14.70%	▼ 5.08%
Coventry	▲ 31.24%	▲ 4.85%	▲ 12.26%	▲ 4.16%
Cardiff	▲ 50.42%	▼ 20.17%	▼ 19.22%	▼ 14.48%

Source: Google Keyword Search Trends (2024-25), amber Insights

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Google Search Trends UK Top 10 Cities:

This analysis highlights Google Keyword Search Trends and interest in student accommodations across the top 10 UK cities. The data offers insights into student sentiments and decision-making factors, helping operators understand the key considerations students weigh when choosing accommodation, including value, lifestyle, location convenience, and university rankings.

Key Highlights:

- **Strong Growth Cities:** Manchester leads with highest demand (64.04% in July–Aug, 41.16% in Aug 24–25). Nottingham (59.96%) and Liverpool (44.05%) also show significant increases in search volumes.
- **Demand Shifts:** Birmingham (-26.48% in Aug 24–25; -19.70% in Apr–Aug), Cardiff (-19.22% in Aug 24-25), and Leeds (-20.04% in July 24–25) show softening demand.
- **Stable Markets:** London (0.20%, 3.33%) and Sheffield (-3.08%, -1.95%) remain relatively stable, indicating mature markets with steady demand.

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UK PBSA Beds & Occupancy by Top 10 Cities (2025)

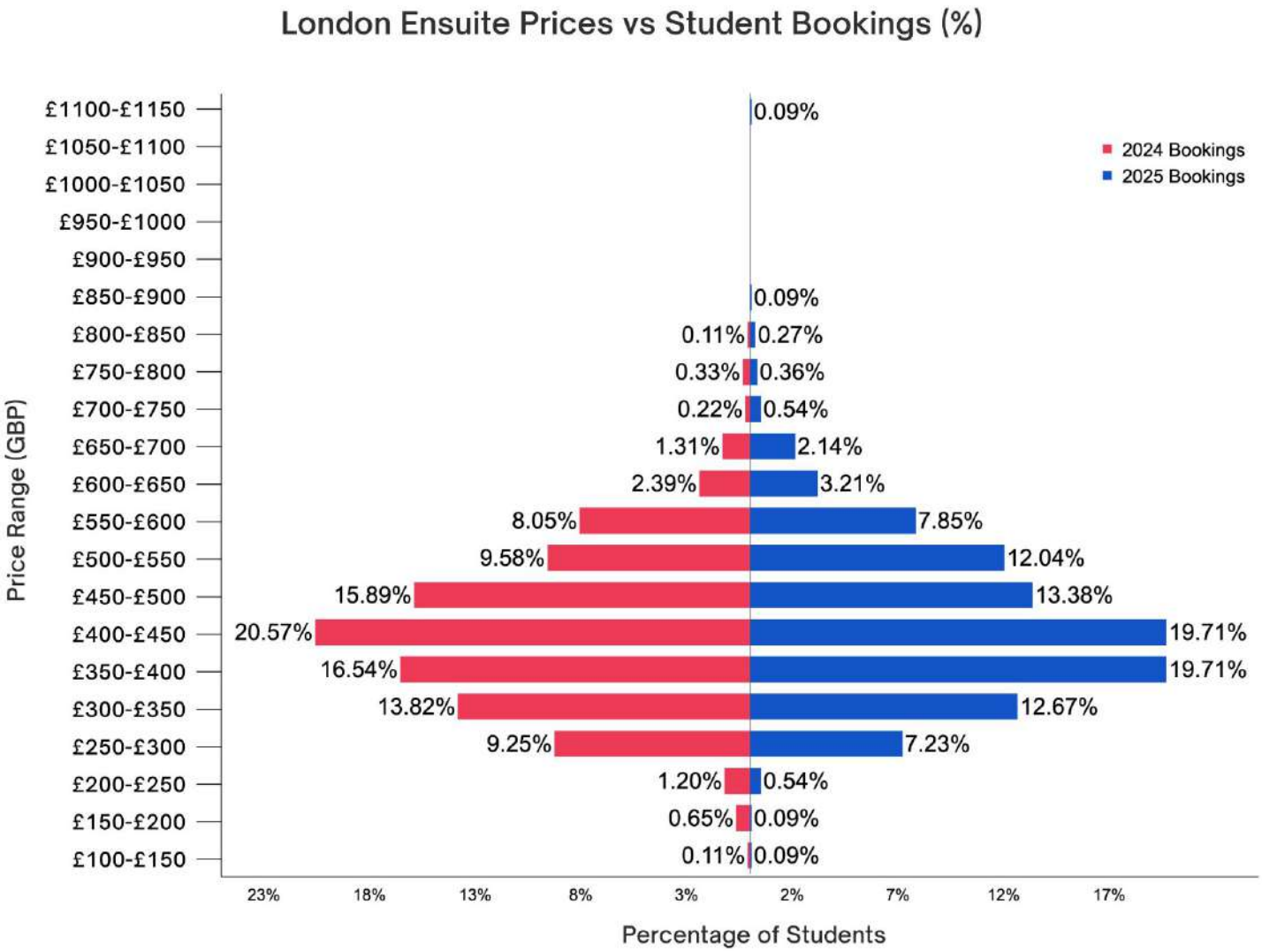
City	Concluding Occupancy (AY24-25)	Current Occupancy (AY25-26)	Total Beds 2024-25 vs 2025-26 (% Change)
Overall-UK	**94.00%**	**92.00%**	**▲ 2.60%**
London	97.00%	91.00%	▲ 2.50%
Leeds	90.00%	91.50%	▲ 3.10%
Liverpool	94.00%	90.00%	▲ 2.20%
Nottingham	83.00%	82.00%	▲ 8.90%
Birmingham	97.00%	92.55%	▲ 7.00%
Sheffield	84%	83%	▲ 1.80%
Manchester	98%	96.50%	▲ 1.80%
Newcastle	93%	91%	▲ 2.10%
Coventry	88%	90%	▲ 0.90%
Cardiff	91%	94%	▲ 4.60%

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- UK overall booking occupancy stands at **92.12%** as of September 2025 as compared to the closing occupancy in AY2024-25 at 94%, with a 2.6% increase in number of beds in current academic year.
- London, Leeds, Liverpool, Birmingham, Manchester, Newcastle and Cardiff cross **90% occupancy mark**.
- Manchester is the **closest to full occupancy** at **96.50%**.

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London: Student Bookings by Room Type



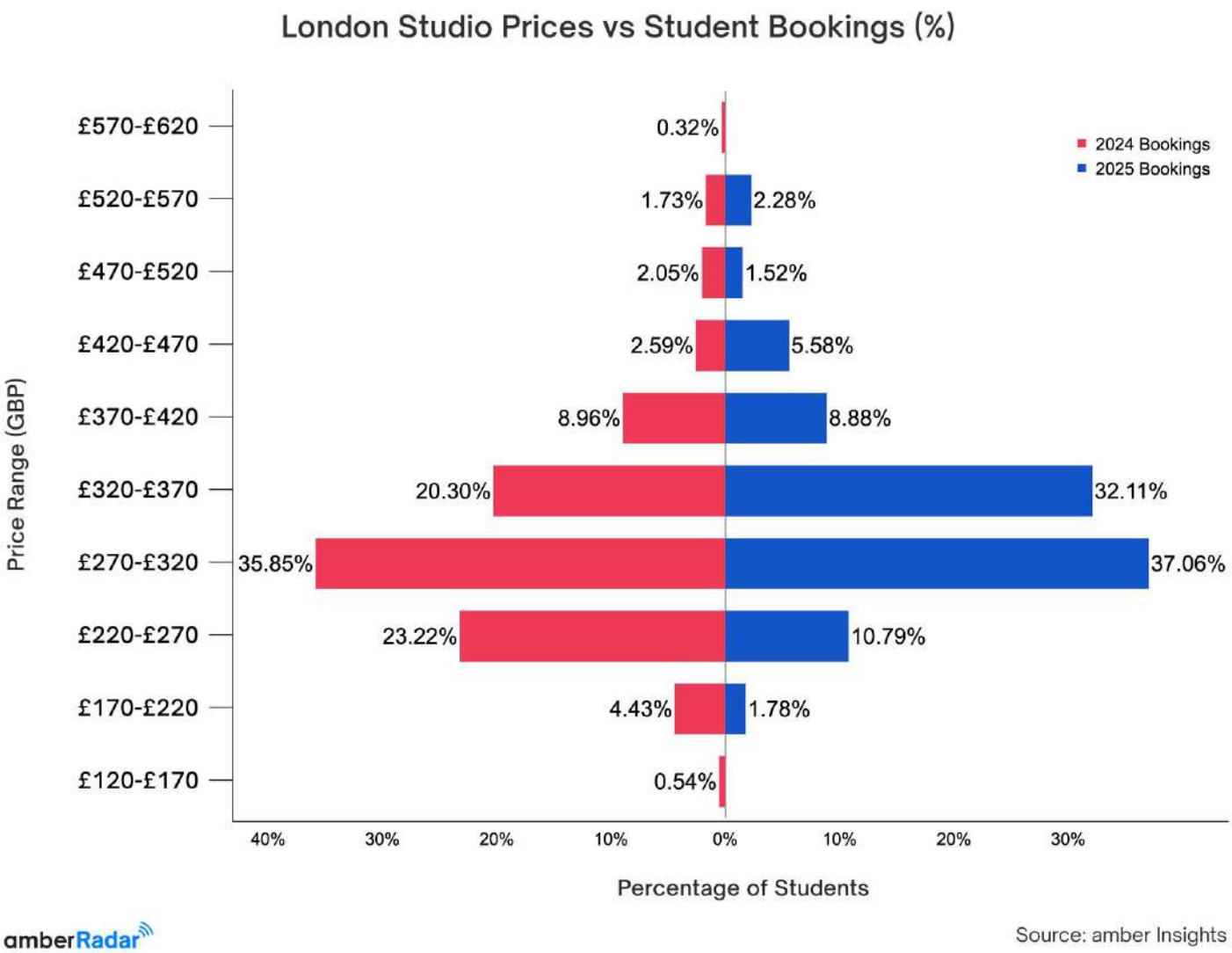
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Source: amber Insights

- London sees stronger concentration in the **£350–£400, £500–£550 and £600–£700** ranges compared to 2024, signaling higher willingness to pay.
- Both years show the highest booking share in **£400–£500**, but 2025 has also expanded in the **£500–£700** band, highlighting mid-to-high range interest.
- **£500–£550** bracket has seen a higher concentration of bookings as compared to 2024.

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London: Student Bookings by Room Type



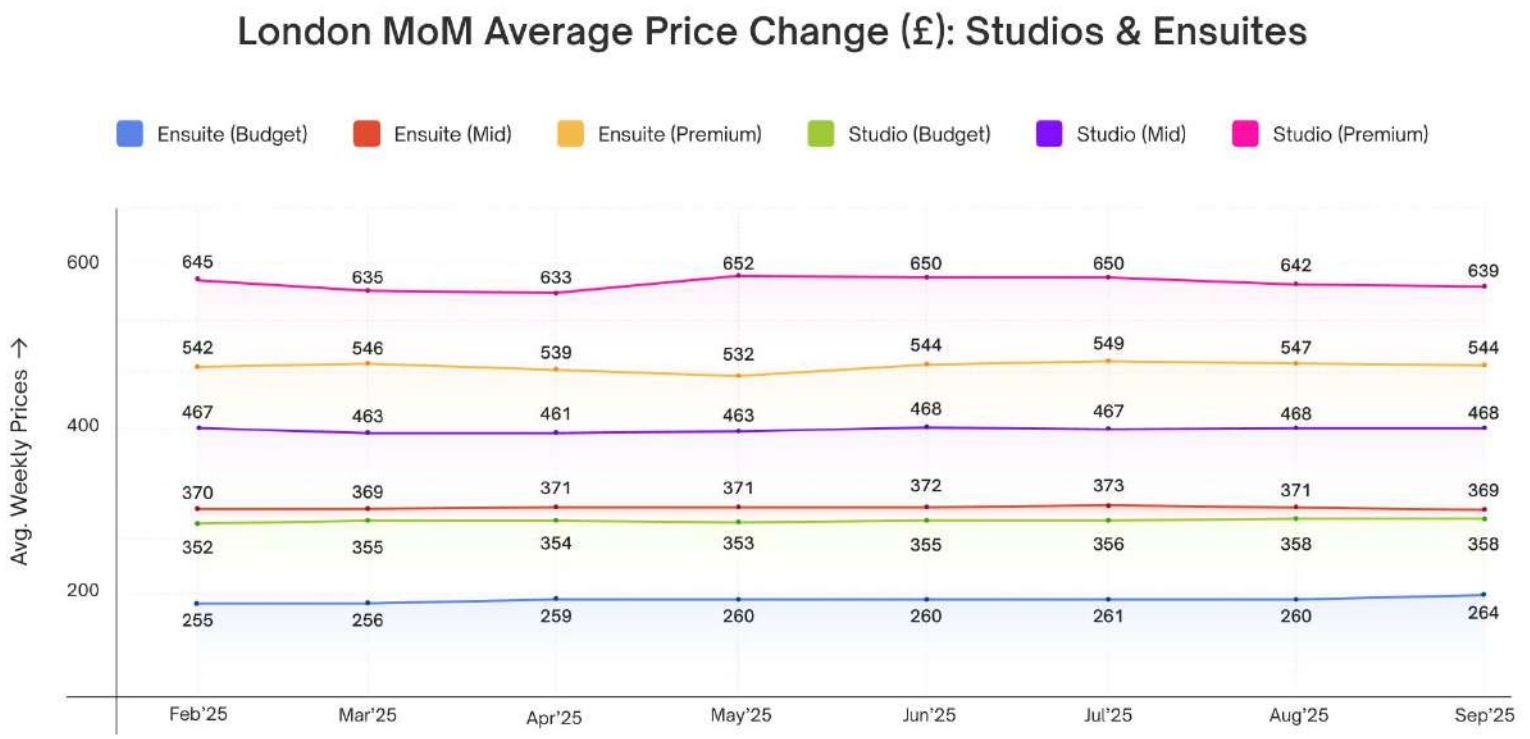
amberRadar

Source: amber Insights

- 2025 demand is concentrated in **£270–£370**, especially **£270–£320**.
- Bookings below **£270** have dropped sharply in 2025 as compared to 2024.
- Price bands above **£420** remain a niche, with **<10% overall share**, showing an increase in 2025 as compared to 2024.

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London Prices by Room Type: Studios & Ensuites



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Source: amber Insights

Pricing Insights: London

- The prices depicted above in the graph are average weekly prices for each month.
- Studio **(Premium)** category prices in London reduced by **an average 1.08%** in AY2025-26 as compared to last year.
- Room prices in London **increased on an average** across all categories except Ensuite (Mid) and Studio (Premium).
- Mid-tier prices are almost flat for both **Ensuites & Studios (0-0.2% YoY),** indicating limited willingness to pay more without added value.

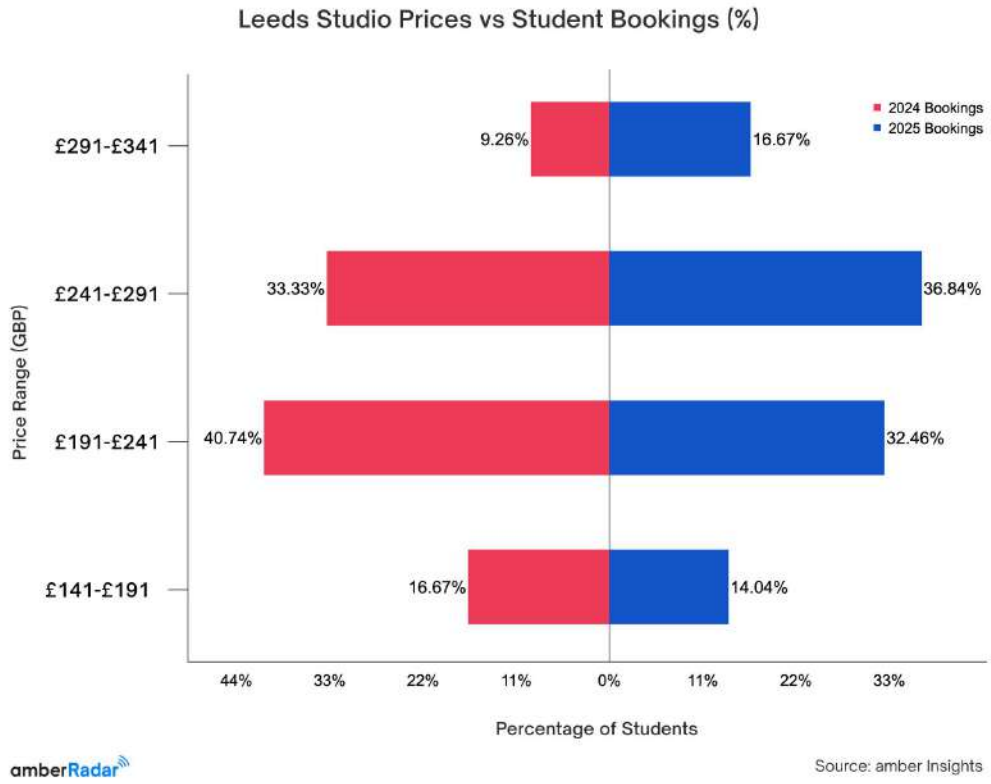
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Pricing Considerations: London

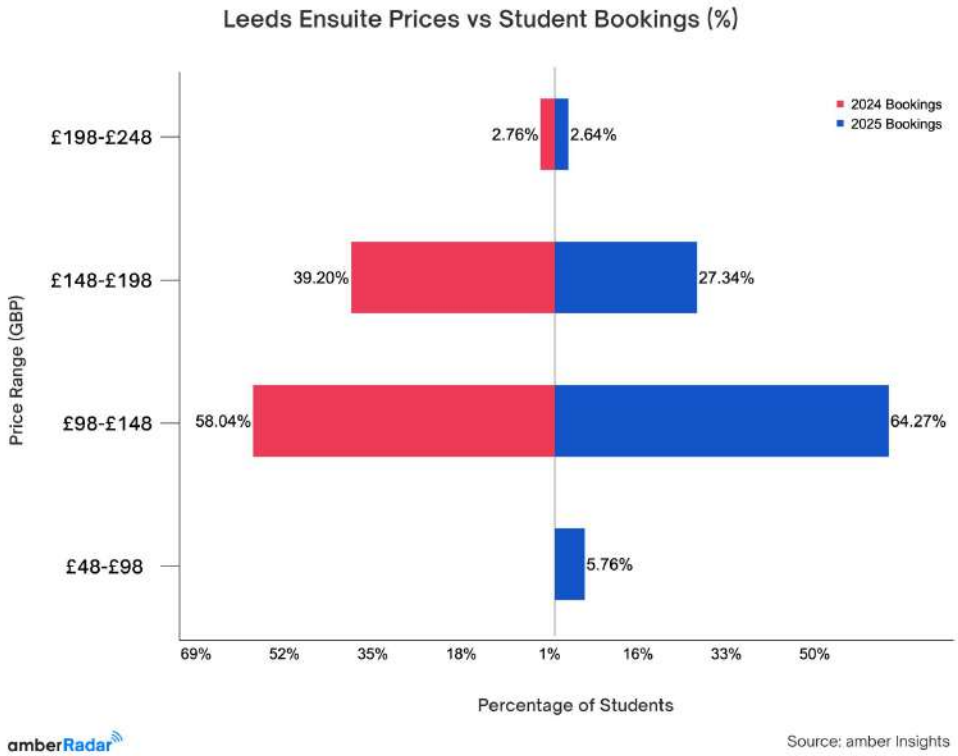
- If your property occupancy is **at par with the market occupancy** (as seen on page 6), it is suggested that you **decrease the launch prices by an average 2.18%** as compared to the current prices.
- If your property occupancy is **higher than the market numbers,** you may keep the current prices consistent or **increase slightly** with discounting later for occupancy optimization.
- If your property occupancy is lower than the market, consider lowering your prices further than **2.18%** as compared to the concluding prices of current AY.
- London's bed count increased by **~2.52% in AY 2025-26** from previous academic year, with current booking occupancy at **91%** in AY 2025-26 as compared to the concluding occupancy of 97% last year.



Leeds: Student Bookings by Room Type



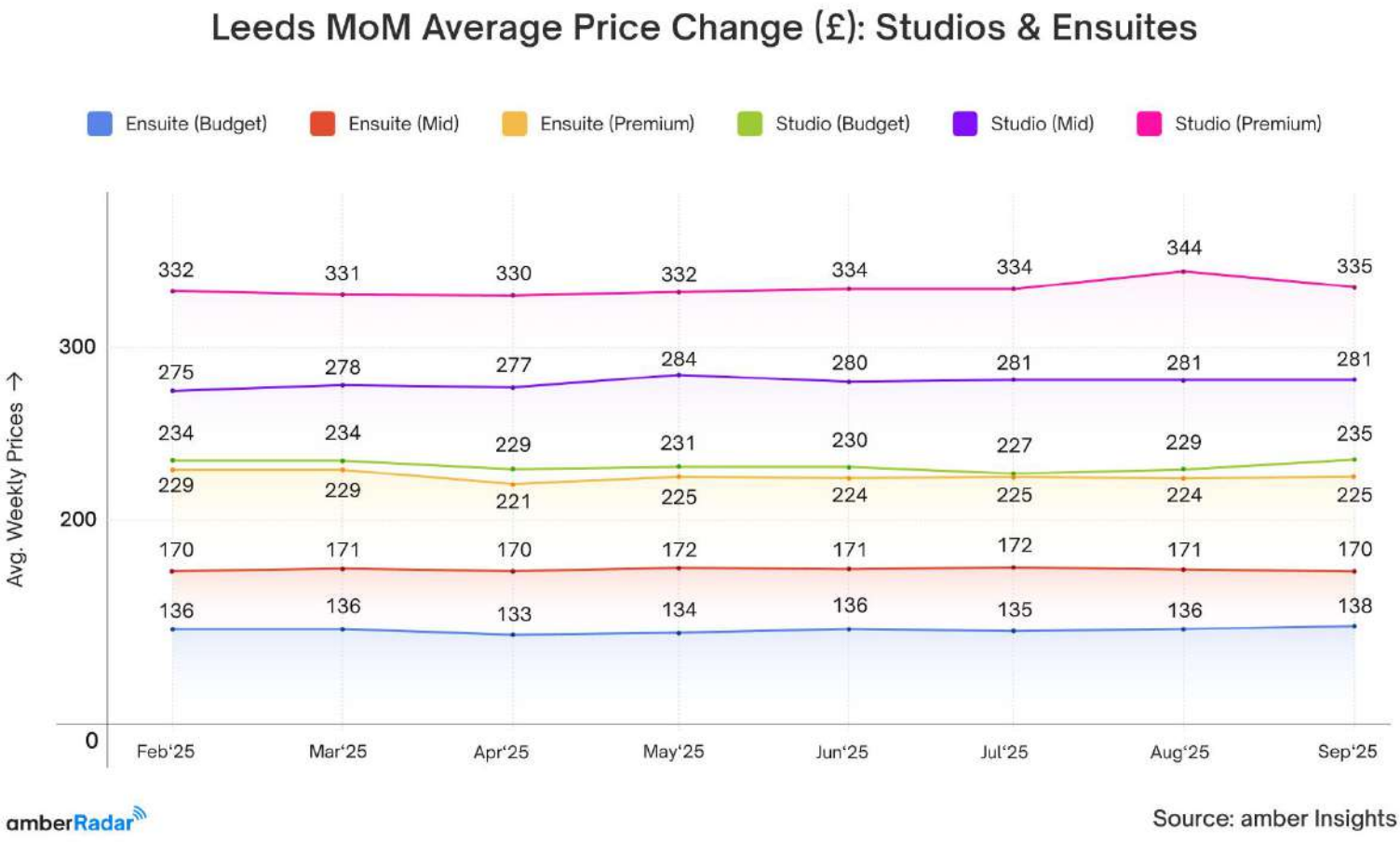
- **36.84%** of students booked Studios in the **£241–£291** range in 2025, an increase from 33% since last year, indicating steady demand in this bracket.
- The share of bookings in the **£191–£241** range declined from 40.74% in 2024 to **32.46%** in 2025.



- **44.36%** of students booked Ensuites in the **£75–£125** range in 2025, up from **15%** since last year, showing an increase in demand for lower-priced Ensuite options.
- The number of bookings in **£125–£175** range dropped from 75.13% in 2024 to **44.36%** in 2025.

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Leeds Prices by Room Type: Studios & Ensuites



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Source: amber Insights

Pricing Insights: Leeds

- The prices depicted above in the graph are average weekly prices for each month.
- **Studio Premium** prices dropped **4.83% YoY**, the steepest decline across categories, as operators reduced rates to boost occupancy amid softer demand.
- **Ensuite Budget (+0.73%)** and **Studio Budget (+0.43%)** rose YoY, reflecting steady demand for affordable options.
- **Ensuite (Mid)** prices fell **0.58%**, while **Studio Mid-tier** grew **1.44%**, indicating stronger preference for Studios in the mid-range due to privacy and value.
- **Studios** remain segmented with Budget and Mid-tier performing well, while Premium declined, showing growing value-consciousness among students.

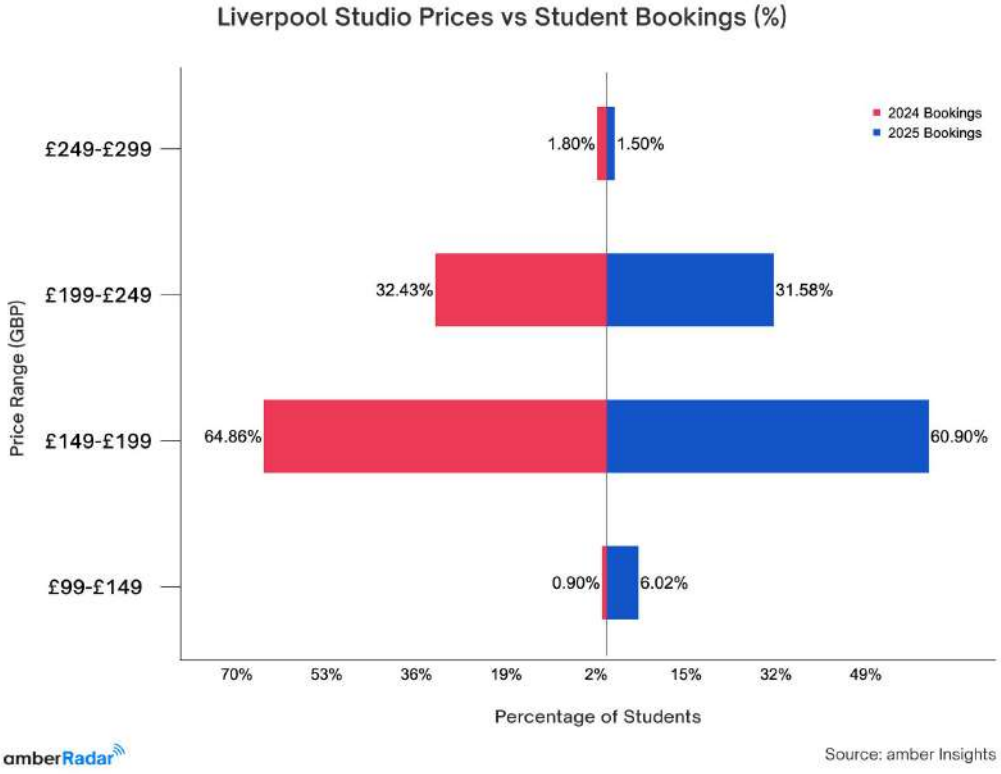
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Pricing Considerations: Leeds

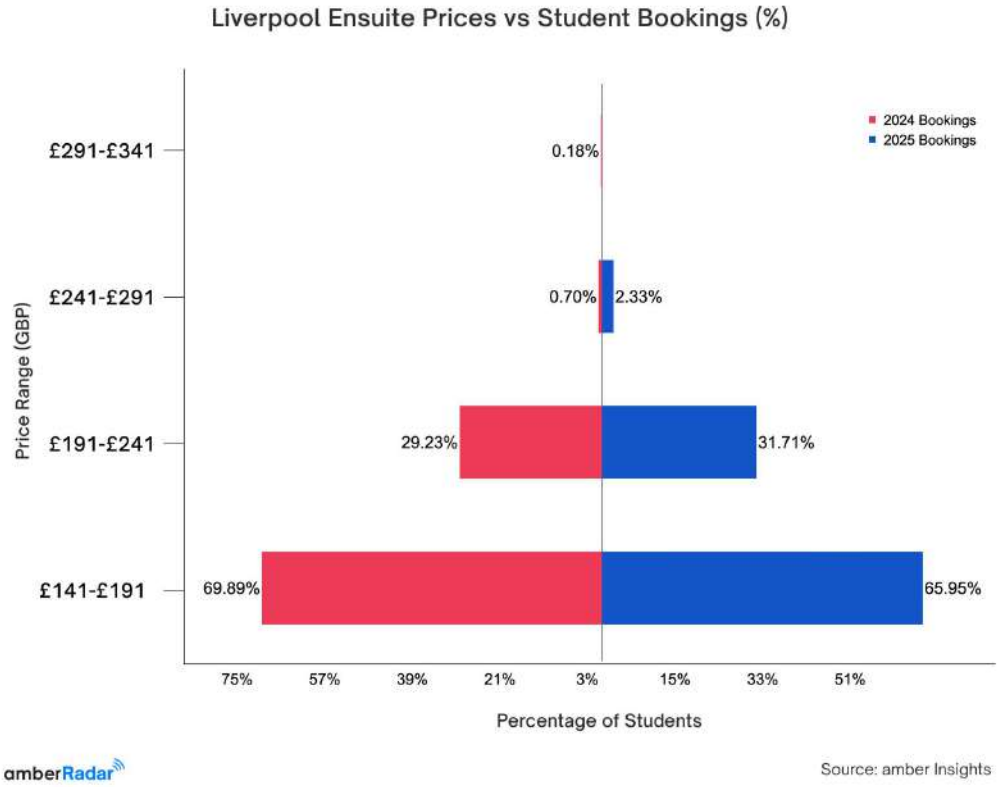
- If your property occupancy is **at par with market levels** (as seen in slide 6)**,** consider **reducing launch prices by an average of 0.35%** from current rates.
- If your Leeds portfolio is **performing above the market occupancy**, maintain current pricing or apply a modest increase, allowing flexibility for future discounting to optimize performance.
- If occupancy is **lower than market levels,** reduce prices by more than **0.35%** compared to the current AY's closing rates.
- **Leeds'** bed count increased by **3.09% in AY 2025-26** from previous academic year, with current booking occupancy at **91.50%** in AY 2025-26, as compared to the concluding occupancy of 90% last year.



Liverpool: Student Bookings by Room Type



60.90% of students booked Studios in the **£149–£199** range in 2025, a slight dip from 64% last year, indicating a shift in demand for low-to-mid priced Studio options.



65.95% of students booked Ensuites in the **£85–£135** range in 2025, a decline from 69%, while £191–£241 range observed an increase to **31.17%** in 2025 as compared to 29.23% in 2024.

Liverpool Prices by Room Type: Studios & Ensuites



amberRadar

Source: amber Insights

Pricing Insights: Liverpool

- The prices depicted above in the graph are average weekly prices for each month.
- Both **Ensuite (Mid)** and **Studio (Mid)** categories saw modest price increases at **+1.36%** and **+1.49% respectively**, indicating steady demand for low or mid-range accommodations and preference for balanced value over premium categories.
- **Premium (Ensuite)** prices rose +**2.82% YoY**, showing lesser bookings despite enhanced amenities or upgraded facilities.
- **Budget (Ensuite)** prices remained unchanged **(0%)**, while Studio Budget declined slightly **(-1.23%)**, reflecting minor flexibility in entry-level pricing.
- **Studio (Premium)** prices declined **19.09% YoY**, the steepest drop across all categories, indicating operators reduced prices to improve occupancy amid oversupply or lower demand.

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Pricing Considerations: Liverpool

- If your property occupancy is **at par with the market occupancy levels** (as seen on page 6), it is suggested that you **decrease the launch prices by an average 1.59%** as compared to the current prices.

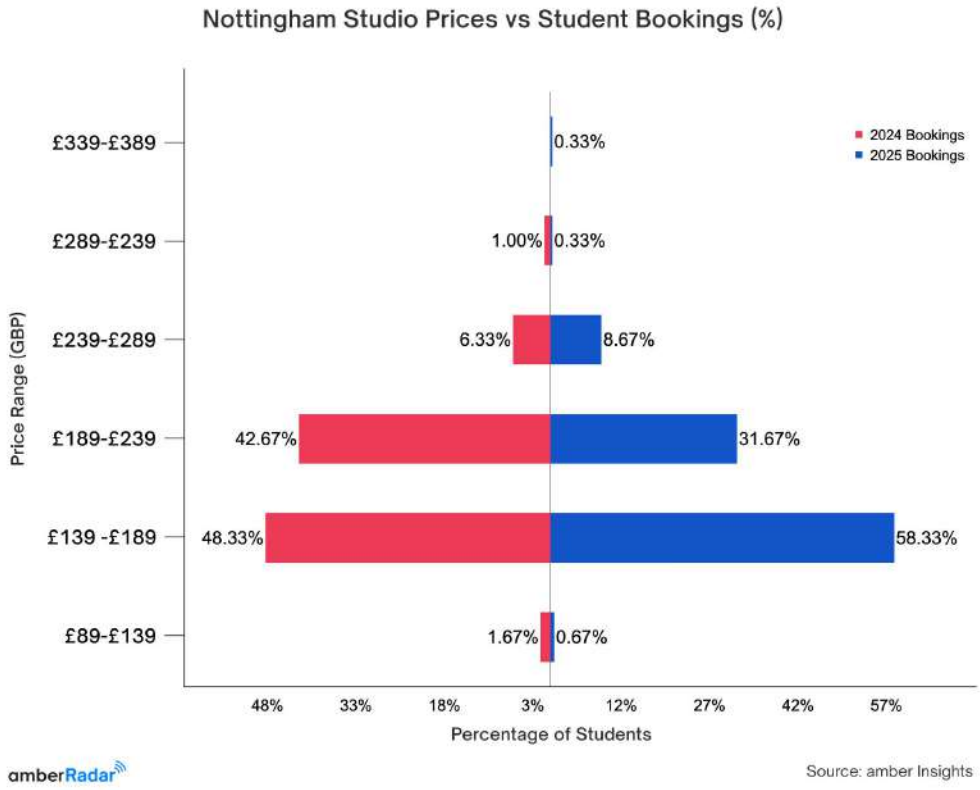
- If your property occupancy is **higher than the market levels**, you may keep the current prices consistent or **increase slightly** with discounting later for occupancy optimization.

- If your property occupancy is **lower than the market**, consider lowering your prices further than **1.59%** as compared to the concluding prices of current AY.

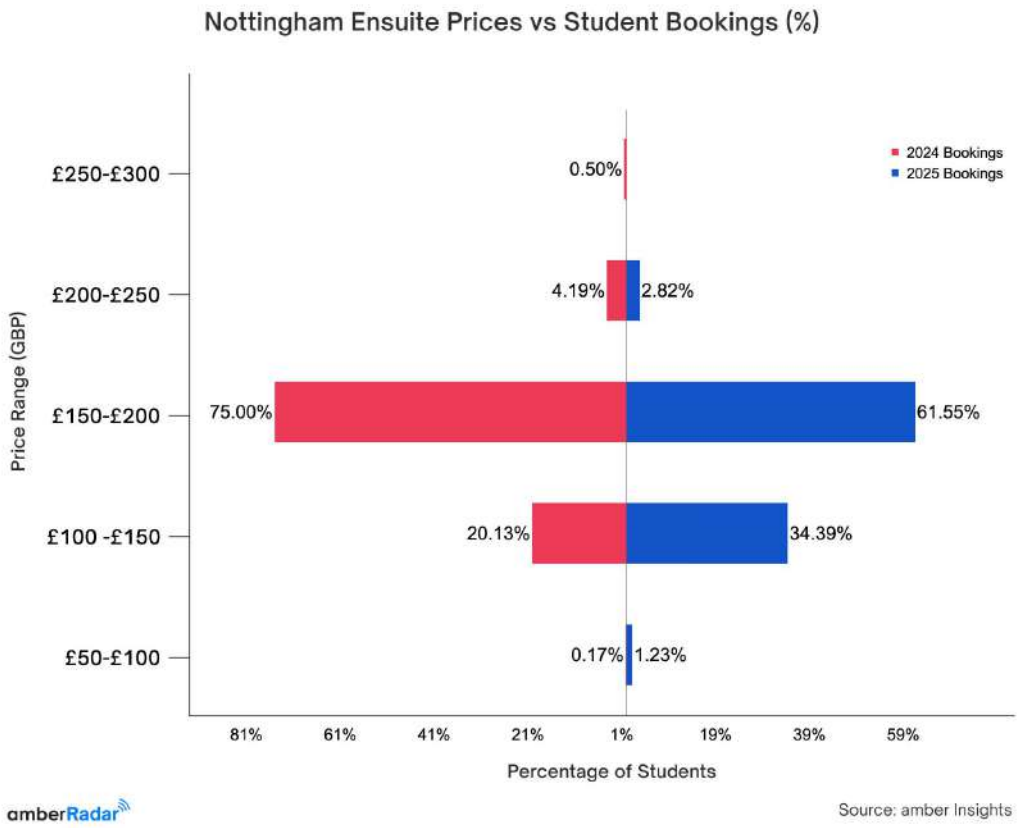
- Liverpool's bed count increased by **2.16% in AY 2025-26** from previous academic year, with current booking occupancy at **90%** in AY 2025-26 as compared to the concluding occupancy of 94% last year.



Nottingham: Student Bookings by Room Type

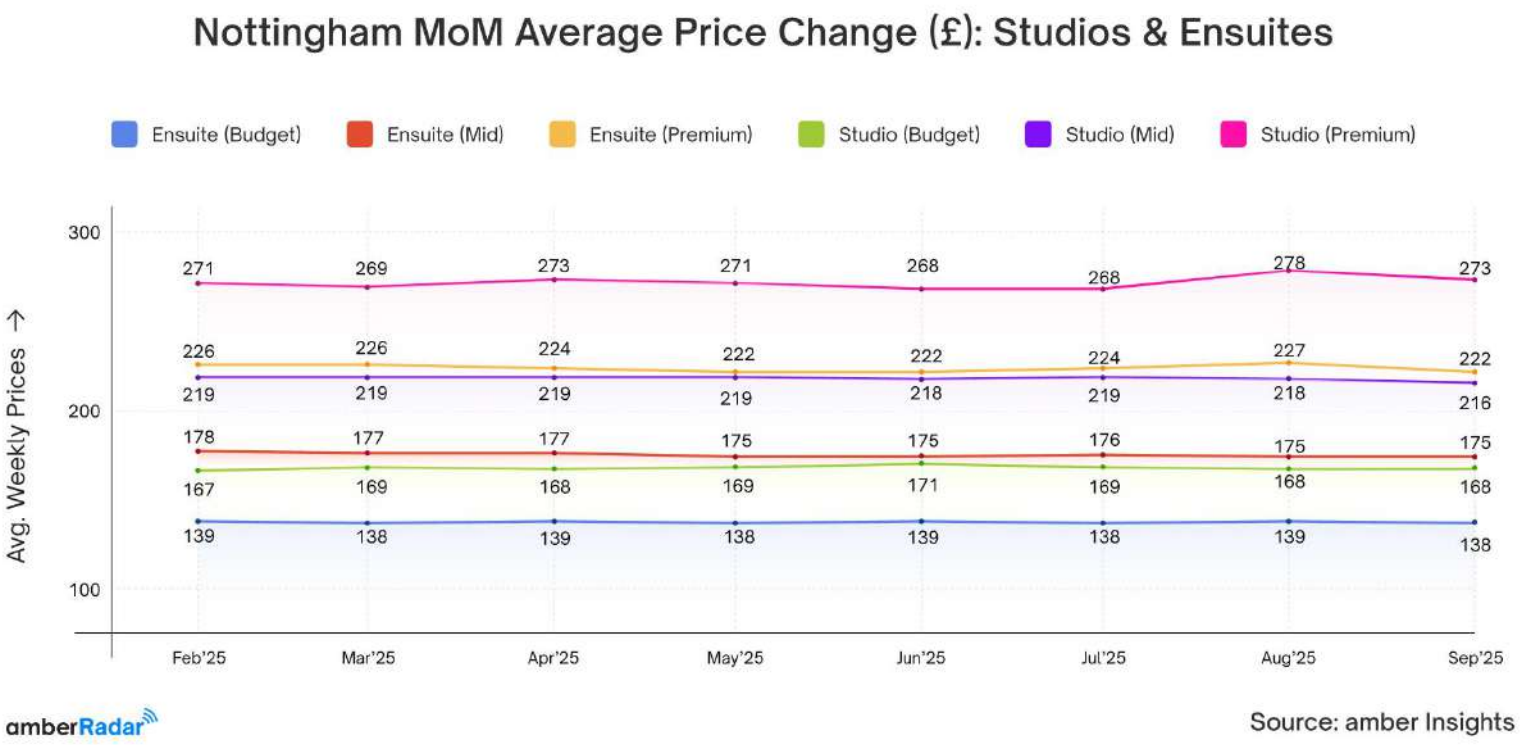


58.33% of students booked Studios in the **£139–£189** range in 2025, an increase from 48.33% last year, indicating a shift in demand towards low-to-mid priced Studio options.



34.39% of students booked Ensuites in the **£110–£150** range in 2025, an uptick from 20% last year, indicating an upward shift in demand towards low-to-mid priced Ensuites options.

Nottingham Prices by Room Type: Studios & Ensuites



amberRadar

Source: amber Insights

Pricing Insights: Nottingham

- The prices depicted above in the graph are average weekly prices for each month.
- **Ensuite categories Budget (-1.43%)**, **Mid (-1.69%)**, and **Premium (-3.48%)** observed price declines YoY in 2025-26, indicating operators reduced prices in response to softer demand.
- **Studio (Budget)** prices fell **-7.18%**, and Studio Mid-tier **-0.92%**, highlighting challenges in attracting students at these price points amid oversupply and shifting preferences.
- **Studio (Premium)** prices increased **+3.41% YoY in 2025-26**, indicating growing demand and successful value positioning for higher-spec Studio options driven by premium amenities and desirable locations.
- The overall trend shows **Studio (Premium)** units gaining traction. However, **Studio (Budgets)** continue to bolster high booking demand from students while facing pricing pressure.

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Pricing Considerations: Nottingham

- If your property occupancy is **at par with the market occupancy levels** (as seen on page 6), it is suggested that you **decrease the launch prices by an average 2.53%** as compared to the current prices.

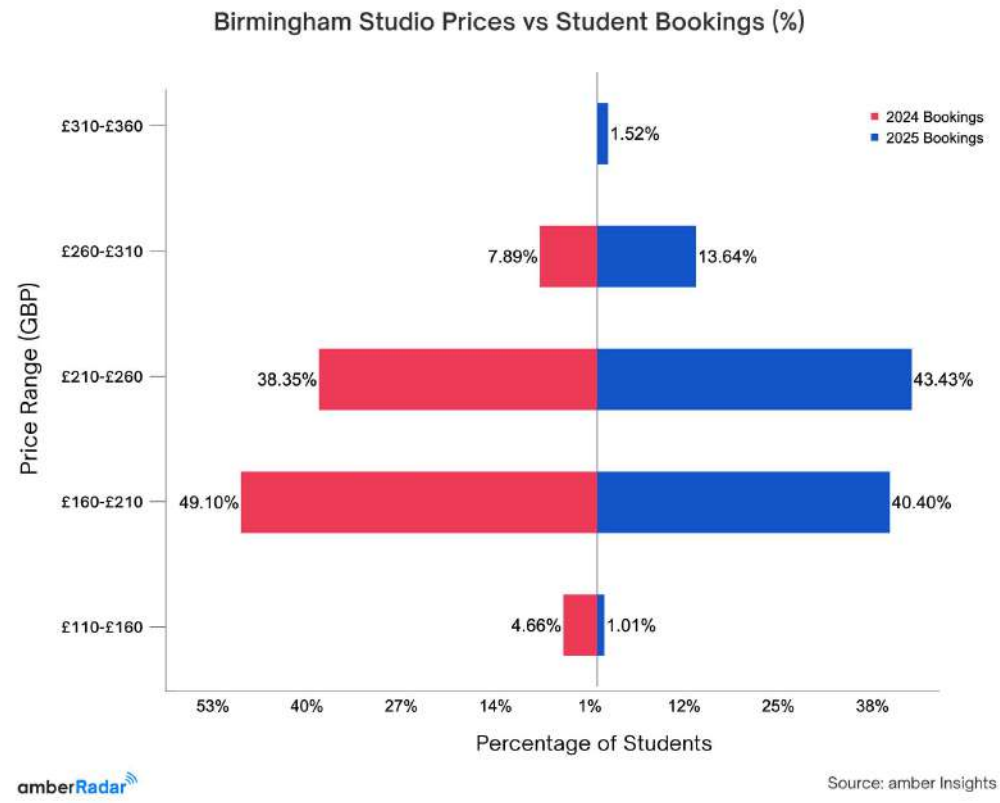
- If your property occupancy is **higher than the market numbers,** you may keep the current prices consistent or **increase slightly** with discounting later for occupancy optimization.

- If your property occupancy is **lower than the market**, consider lowering your prices further than **2.53%** as compared to the concluding prices of current AY.

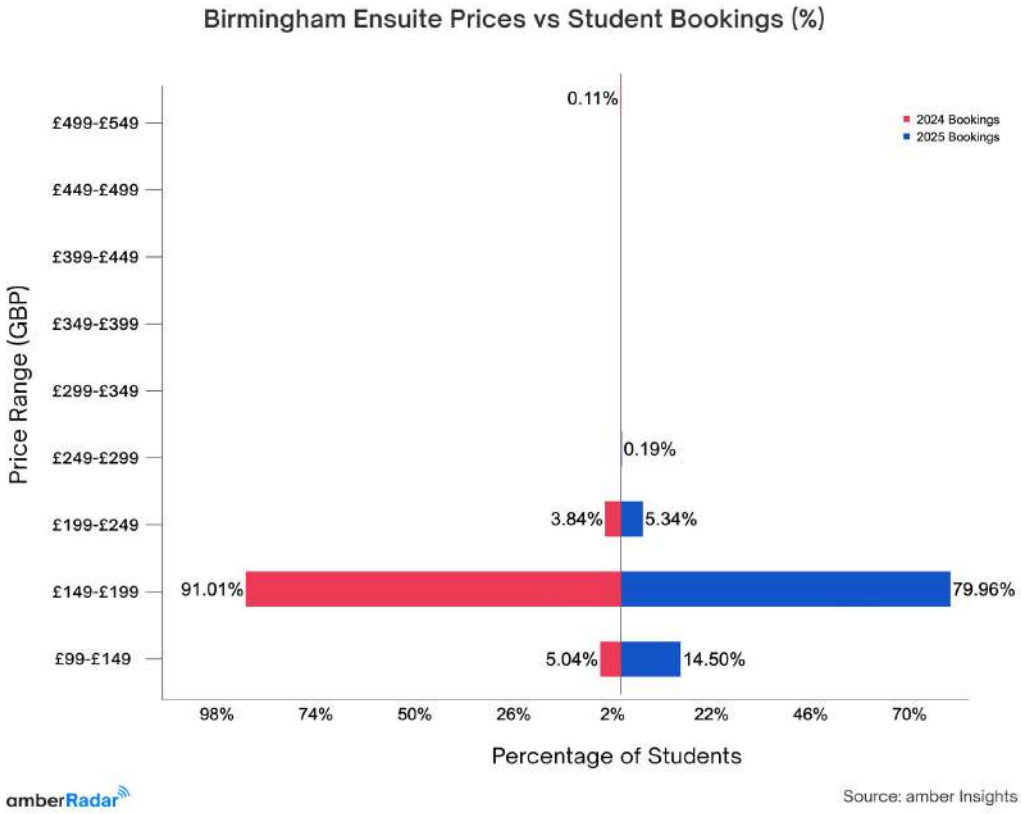
- Nottingham's bed count increased by **~8.94% in AY 2025-26** from previous academic year, with current booking occupancy at **82%** in AY 2025-26 as compared to the concluding occupancy of 83% last year.



Birmingham: Student Bookings by Room Type

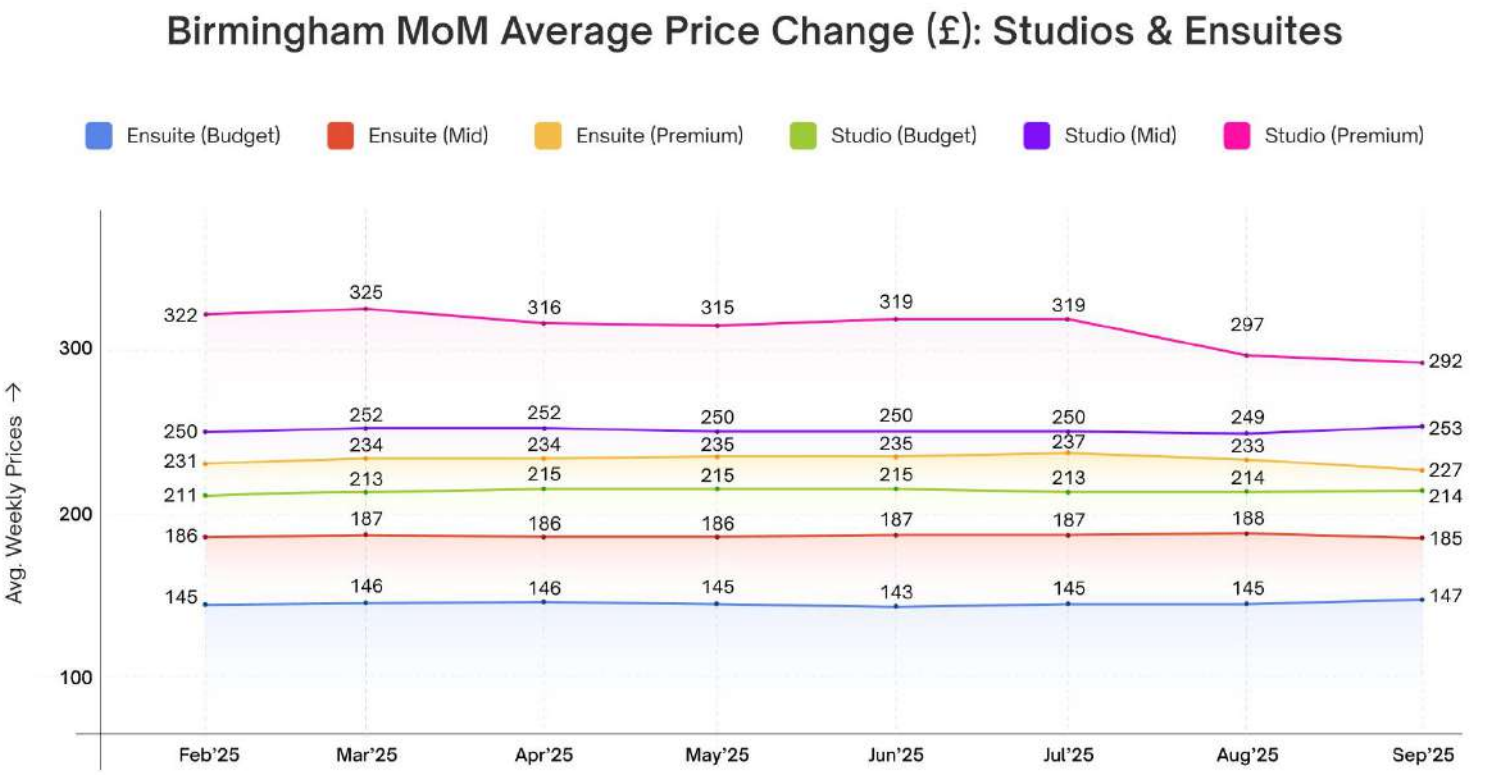


43.43% of students booked Studios in the **£210–£260** range in 2025, an increase from 38% last year, indicating a shift toward mid-priced Studio options.



14.50% of students booked Ensuites in the **£99–£149** range in 2025, indicating interest for low-priced Ensuite options. **£149–£199** mid-range Ensuite options continue to be in high demand.

Birmingham Prices by Room Type: Studios & Ensuites



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Source: amber Insights

Pricing Insights: Birmingham

- The prices depicted above in the graph are average weekly prices for each month.
- **Studio (Premium)** prices declined **-10.98% YoY in 2025-26**, reflecting a major price shift. Operators likely responded to persistent vacancies or weaker demand for top-tier Studio units, indicating oversupply and value perception challenges among students.
- **Ensuite (Budget)** prices remained flat with no price change, while Studio (Budget) increased slightly at **+0.47%**, highlighting steady demand and limited pricing flexibility in affordable accommodation options.
- Ensuite (Mid) prices fell moderately **-0.54%**, while Ensuite (Premium) declined by **-5.81%**, pointing to increased competition and reduced willingness among students to pay for premium options compared to cheaper alternatives.
- **Studio (Mid)** prices showed marginal growth at **+0.40%**, suggesting a balanced market in this segment with slight shifts in demand and supply dynamics.

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Pricing Considerations: Birmingham

- If your property occupancy is **at par with the market occupancy levels** (as seen on page 6)**,** it is suggested that you **decrease the launch prices by an average 2.87%** as compared to the current prices.

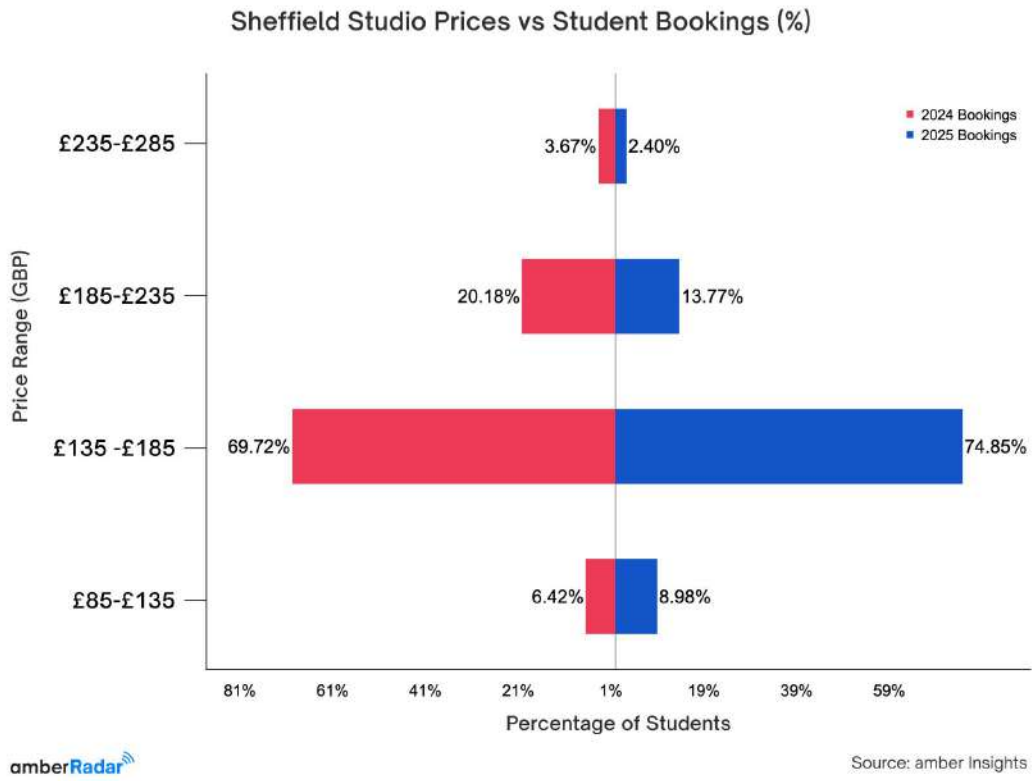
- If your property occupancy is **higher than the market levels,** you may keep the current prices consistent or increase slightly with discounting later for occupancy optimization.

- If your property occupancy is **lower than the market,** consider lowering your prices further than **2.87%** as compared to the concluding prices of current AY.

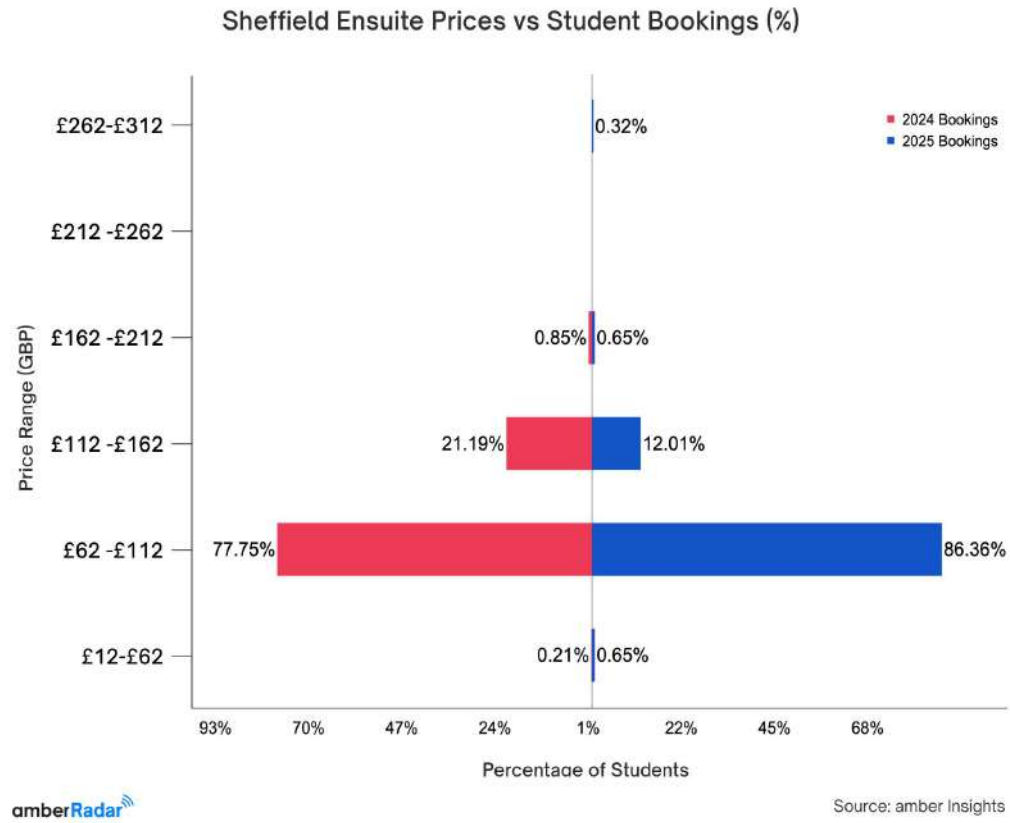
- Birmingham's bed count increased by **~6.95% in AY 2025-26** from previous academic year, with current booking occupancy at **92.55%** in AY 2025-26 as compared to the concluding occupancy of 97% last year.



Sheffield: Student Bookings by Room Type

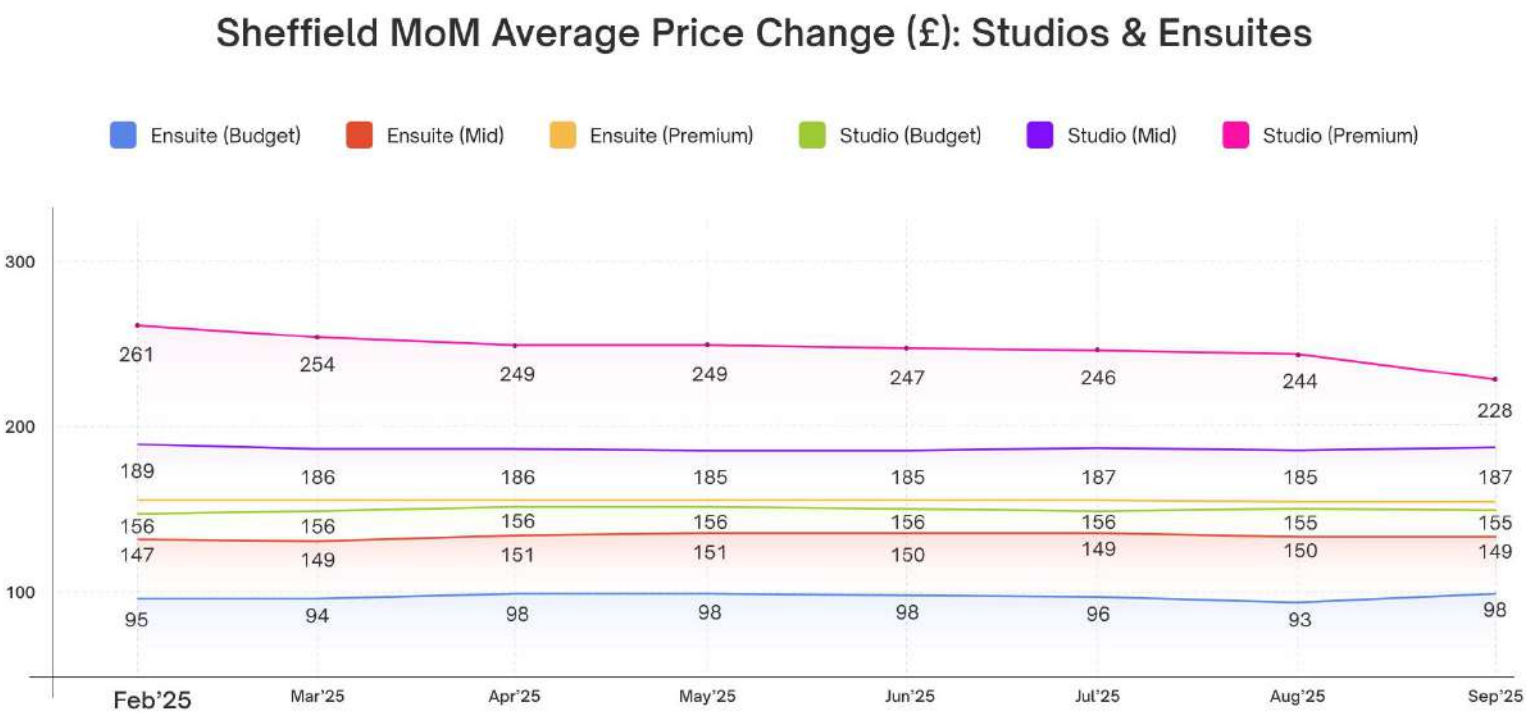


74.85% of students booked Studios in the **£135–£185** range in 2025, an increase from 69.72% last year, indicating growing demand for mid-priced Studio options.



86.36% of students preferred Ensuites in the **£62–£112** range in 2025, an increase from 77.75% since last year, indicating growing demand for low-priced Studio options.

Sheffield Prices by Room Type: Studios & Ensuites



amberRadar

Source: amber Insights

Pricing Insights: Sheffield

- The prices depicted above in the graph are average weekly prices for each month.
- **Ensuite (Budget)** prices increased **+2.08% YoY in 2025-26**, the highest among all categories, indicating strong demand for affordable private rooms and operator confidence in maintaining competitive pricing.
- **Ensuite (Mid)** prices rose **+0.76%**, reflecting steady performance in the mid-range segment, supported by value-conscious students seeking comfort at reasonable cost.
- **Premium (Ensuite)** prices declined **-0.64%**, highlighting greater price sensitivity at higher-priced Ensuite offerings.
- All Studio categories recorded year-over-year declines with **Budget** at **-1.32%**, **Mid** at **-2.60%**, and **Premium** at **-11.63%** (highest price drop).

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Pricing Considerations: Sheffield

- If your property occupancy is **at par with the market occupancy levels** (as seen on page 6)**,** it is suggested that you **decrease the launch prices by an average 0.75%** as compared to the current prices.

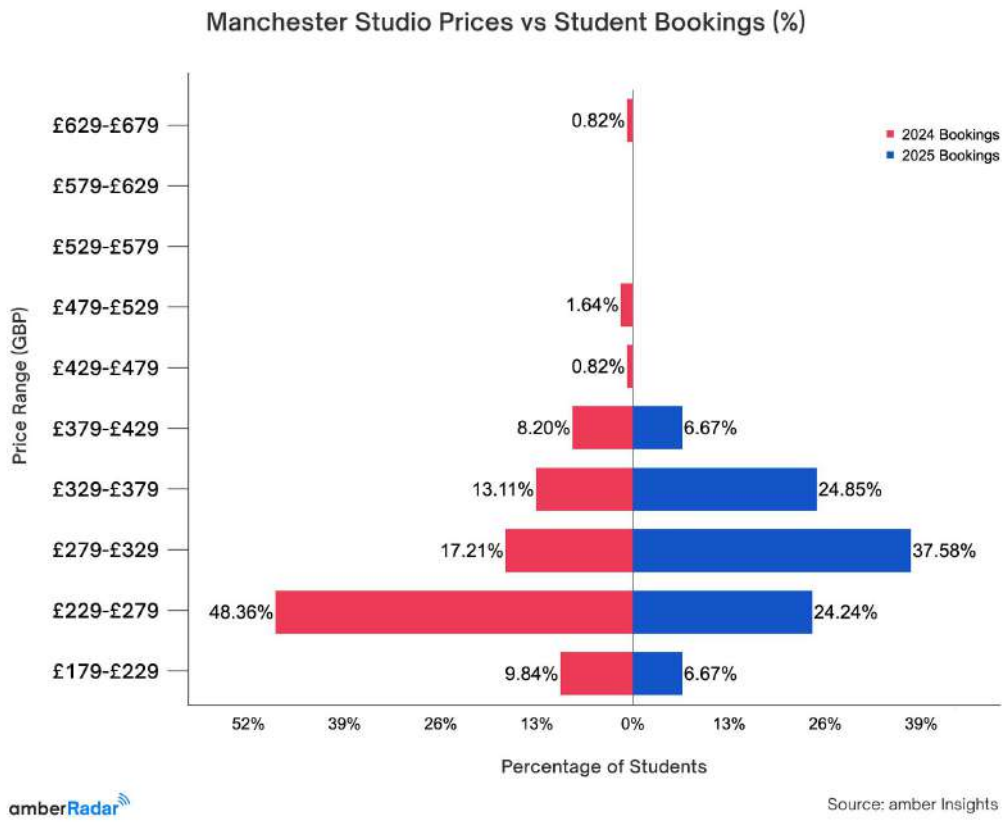
- If your property occupancy is **higher than the market numbers**, you may keep the current prices consistent or **increase slightly** with discounting later for occupancy optimization.

- If your property occupancy is **lower than the market,** consider lowering your prices further than **0.75%** as compared to the concluding prices of current AY.

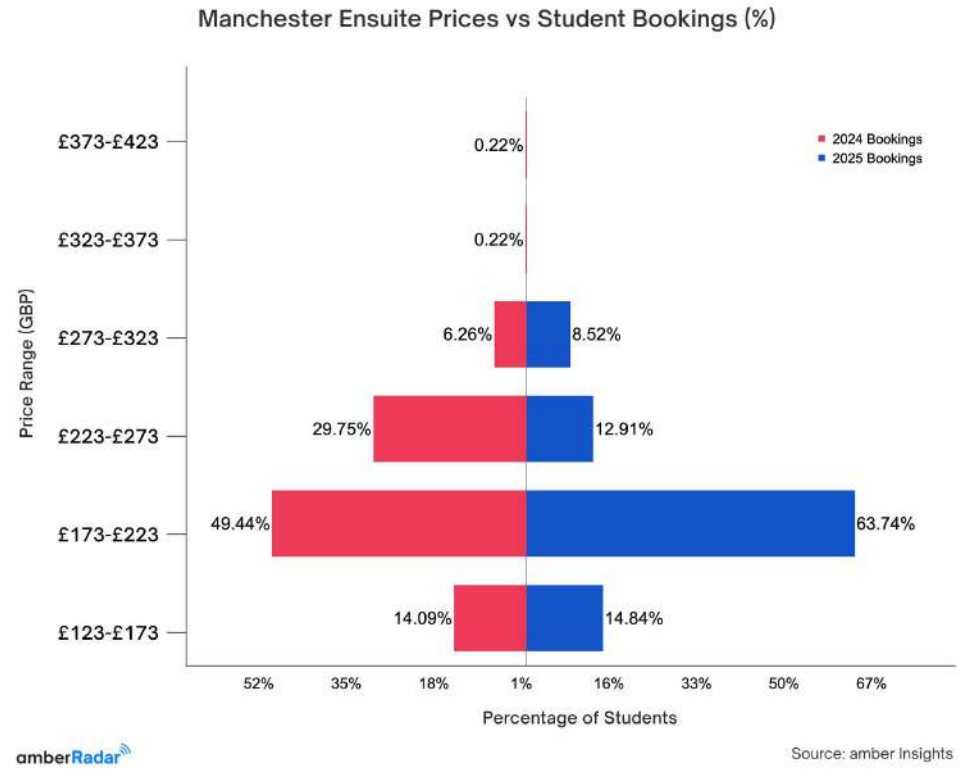
- Sheffield's bed count increased by **~1.84% in AY 2025-26** from previous academic year, with current booking occupancy at **83%** in AY 2025-26 as compared to the concluding occupancy of **84%** last year.



Manchester: Student Bookings by Room Type

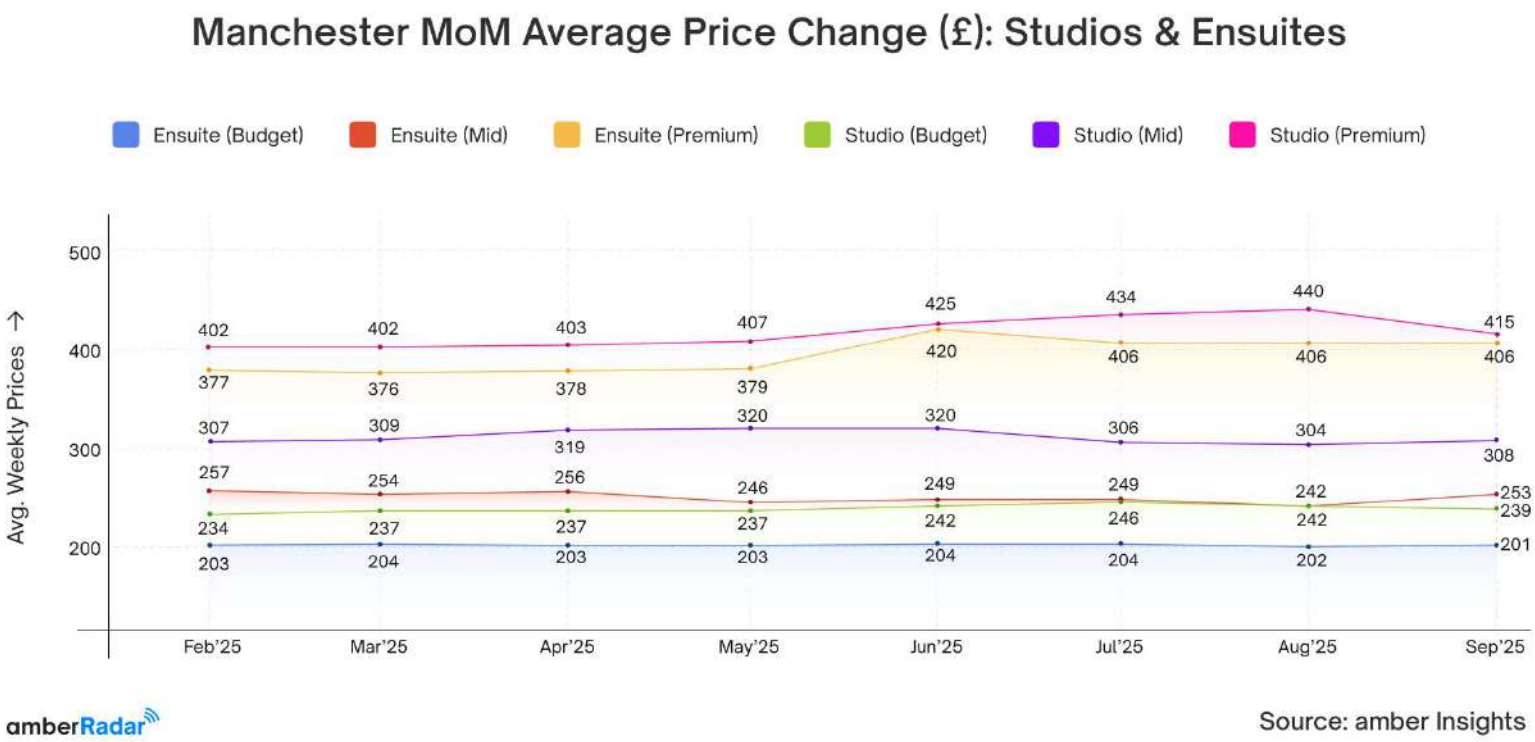


37.58% of students booked Studios in the **£279–£329** range in 2025, an increase from 17.21% last year, indicating shift in demand towards high-to-mid priced Studio options.



63.74% of students booked Ensuites in the **£173–£223** range in 2025, an increase from 49.44% last year, indicating a growing demand for low-to-mid priced Ensuite options.

Manchester Prices by Room Type: Studios & Ensuites



amberRadar

Source: amber Insights

Pricing Insights: Manchester

- The prices depicted above in the graph are average weekly prices for each month.
- **Ensuite (Mid)** prices rose **+0.80%**, reflecting stable demand for mid-priced Ensuite rooms as students continue to seek a balance between comfort and affordability.
- **Ensuite (Budget)** prices declined by **-1.47%**, while **Ensuite (Premium)** fell **-0.49%**, indicating price drops across Ensuite categories. The Ensuite (Budget) dip may also reflect increased competition from alternative options.
- **Studio (Budget)** prices increased **+3.91% YoY in 2025-26**, indicating rising demand for affordable private studio accommodations. Operators have effectively capitalized on value-driven tenants in this segment.
- **Studio (Mid)** prices declined by **-2.53%**, and **Studio (Premium)** by **-5.03%**, highlighting reduced willingness among students to opt for higher-priced studio options, urging operators to make price adjustments.

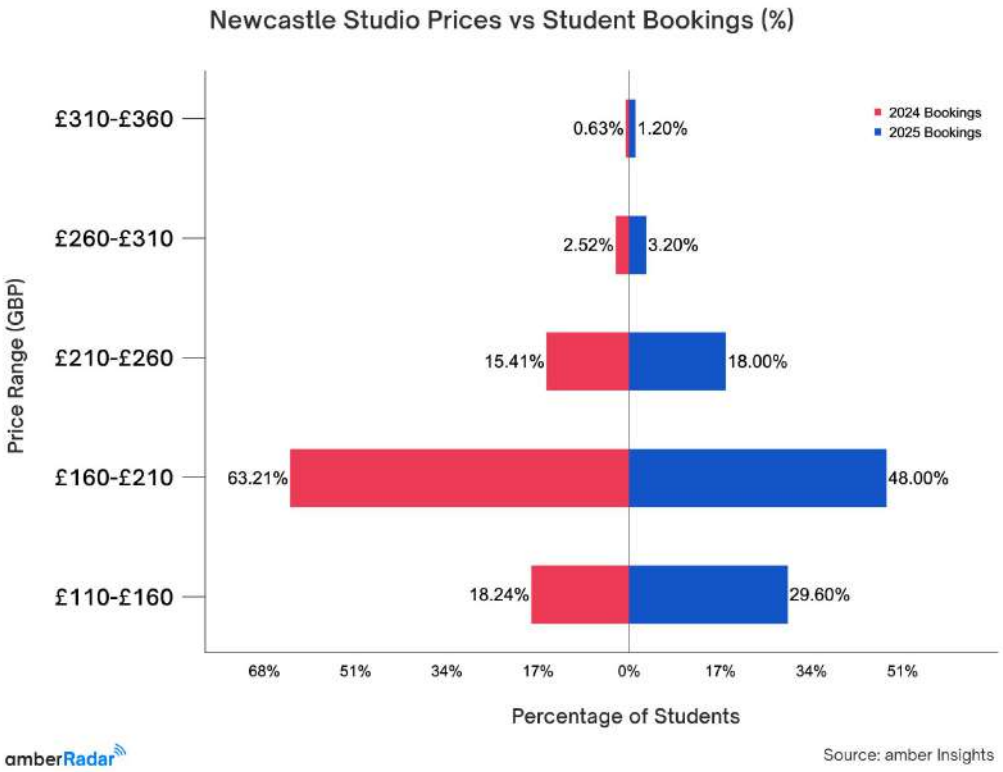
*Insights & Analysis are proprietary to amber; please write to us for Insight usage, publishing permissions.

Pricing Considerations: Manchester

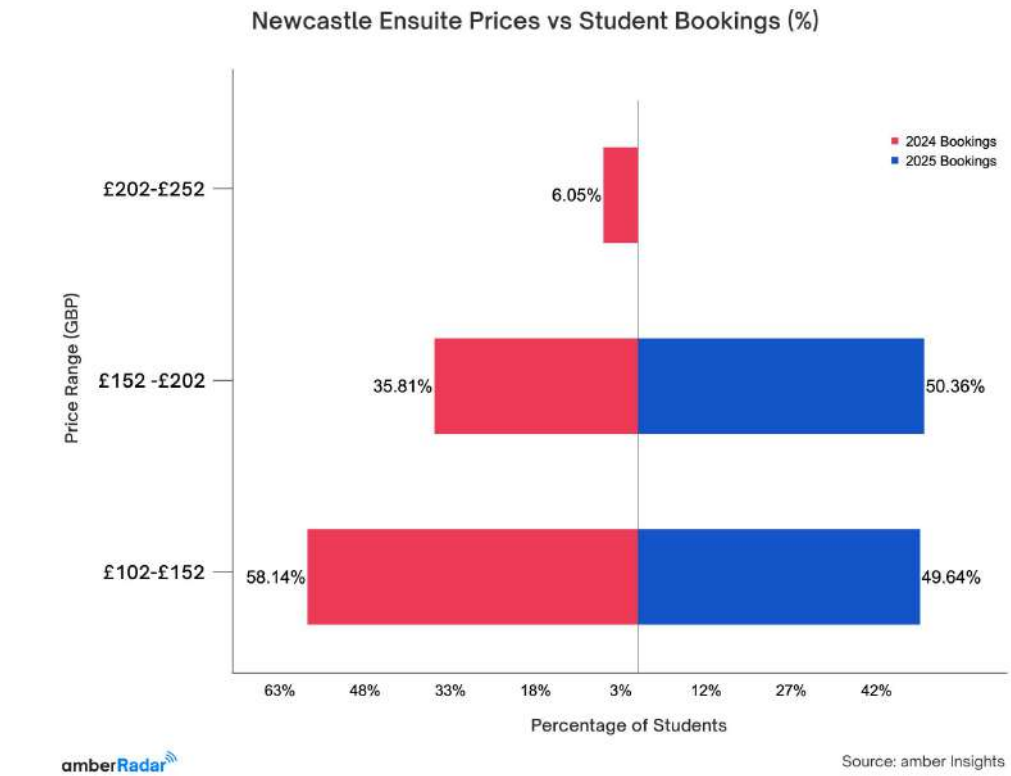
- If your property occupancy is **at par with the market occupancy levels** (as seen on page 6), it is suggested that you **decrease the launch prices by an average 1.51%** as compared to the current prices.
- If your property occupancy is **higher than the market numbers,** you may keep the current prices consistent or **increase slightly** with discounting later for occupancy optimization.
- If your property occupancy is **lower than the market,** consider lowering your prices further than **1.51%** as compared to the concluding prices of current AY.
- Manchester's bed count increased by **4.48% in AY 2025-26** from previous academic year, with current booking occupancy at **96.50%** in AY 2025-26 as compared to the concluding occupancy of 98% last year.



Newcastle Upon Tyne: Student Bookings by Room Type



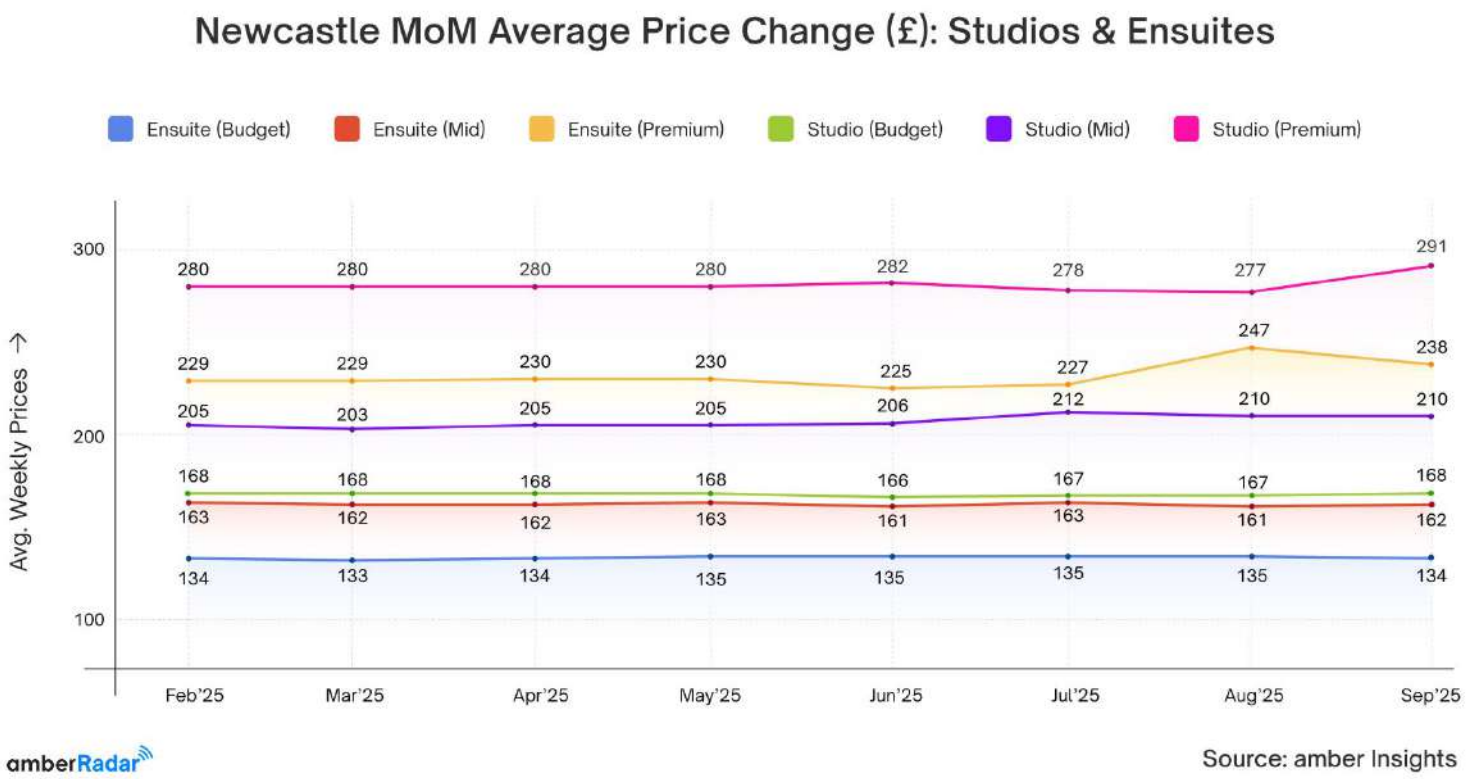
29.60% of students booked Studios in the **£110–£160** range in 2025, indicating strong demand for low-priced Studio options. **£160–£210** range remains top choice among students with 48% bookings.



50.36% of students booked Ensuites in the **£152–£202** range while **49.64%** students also booked within **£102–£152** range in 2025, indicating a growing demand for low-to-mid priced Ensuite options.

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Newcastle Upon Tyne by Room Type: Studios & Ensuites



amberRadar

Source: amber Insights

Pricing Insights: Newcastle Upon Tyne

- The prices depicted above in the graph are average weekly prices for each month.
- **Ensuite (Budget)** and **Ensuite (Mid)** prices remained **unchanged**, reflecting balanced market dynamics, with operators maintaining price points aligned to student expectations.
- **Ensuite (Premium)** prices rose slightly by **+0.85%**, suggesting limited but positive growth in demand and perceived value for upscale Ensuite offerings.
- **Studio (Premium)** prices increased **+4.68% YoY in 2025-26**, reflecting healthy demand for high-spec Studio units. This also suggests successful value positioning and potentially limited competition in the high-end Studio market.
- **Studio (Budget)** and **Studio (Mid)** prices increased by **+0.60%** and **+1.94%** respectively, indicating a stable market with steady demand for both entry-level and mid-priced Studio options.

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Pricing Considerations: Newcastle Upon Tyne

- If your property occupancy is **at par with the market occupancy levels** (as seen on page 6), it is suggested that you **decrease the launch prices by an average 1.07%** as compared to the current prices.

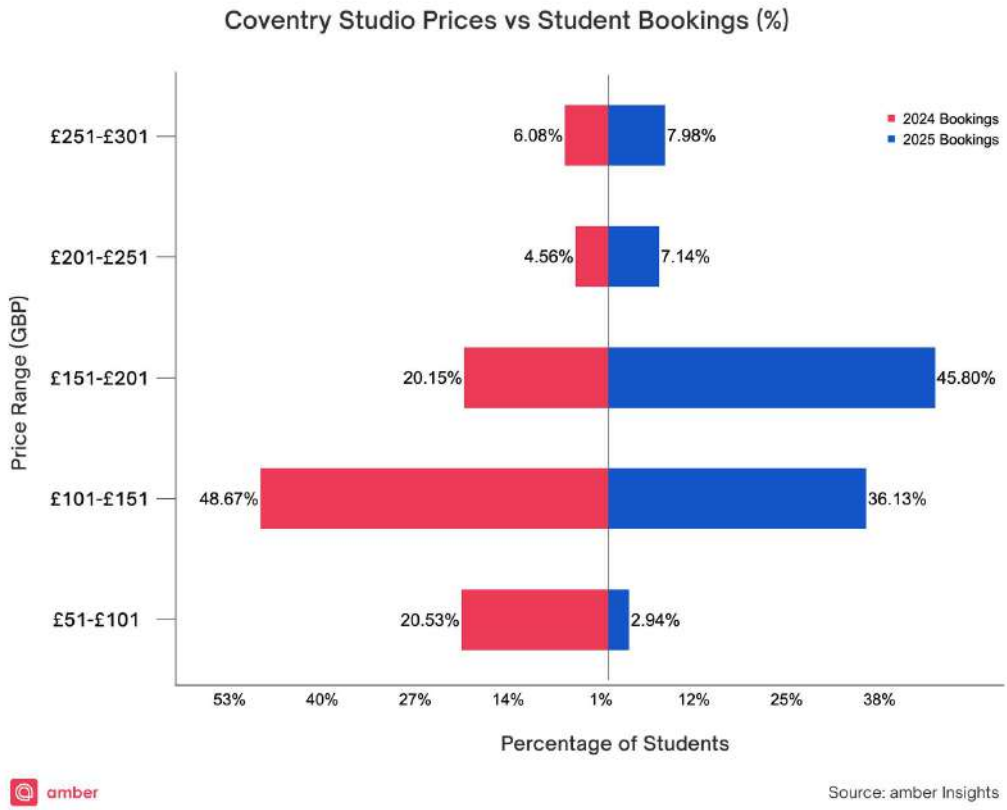
- If your Newcastle Upon Tyne portfolio is performing **above the market occupancy,** maintain current pricing or apply a modest increase, allowing flexibility for future discounting to optimize performance.

- If your property occupancy is **lower than the market,** consider lowering your prices further than 1.07% as compared to the concluding prices of current AY.

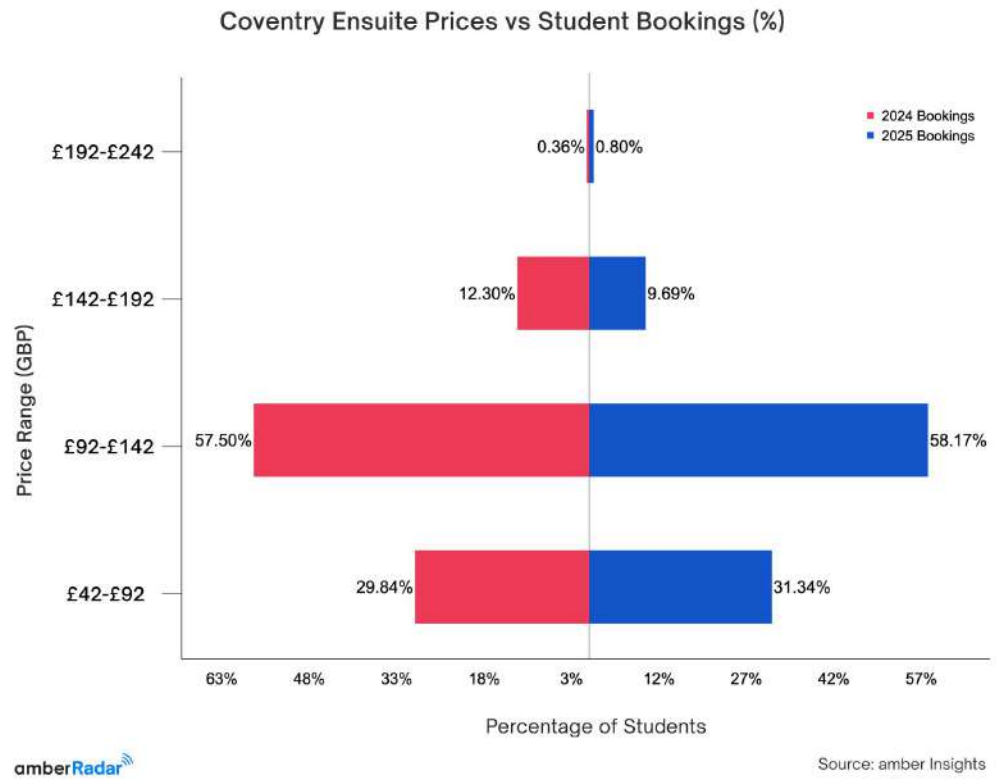
- Newcastle's bed supply increased by **2.12%** in AY 2025–26 compared to the previous academic year. However, **current** occupancy stands at **91%,** slightly below last year's closing occupancy of 93%.



Coventry: Student Bookings by Room Type



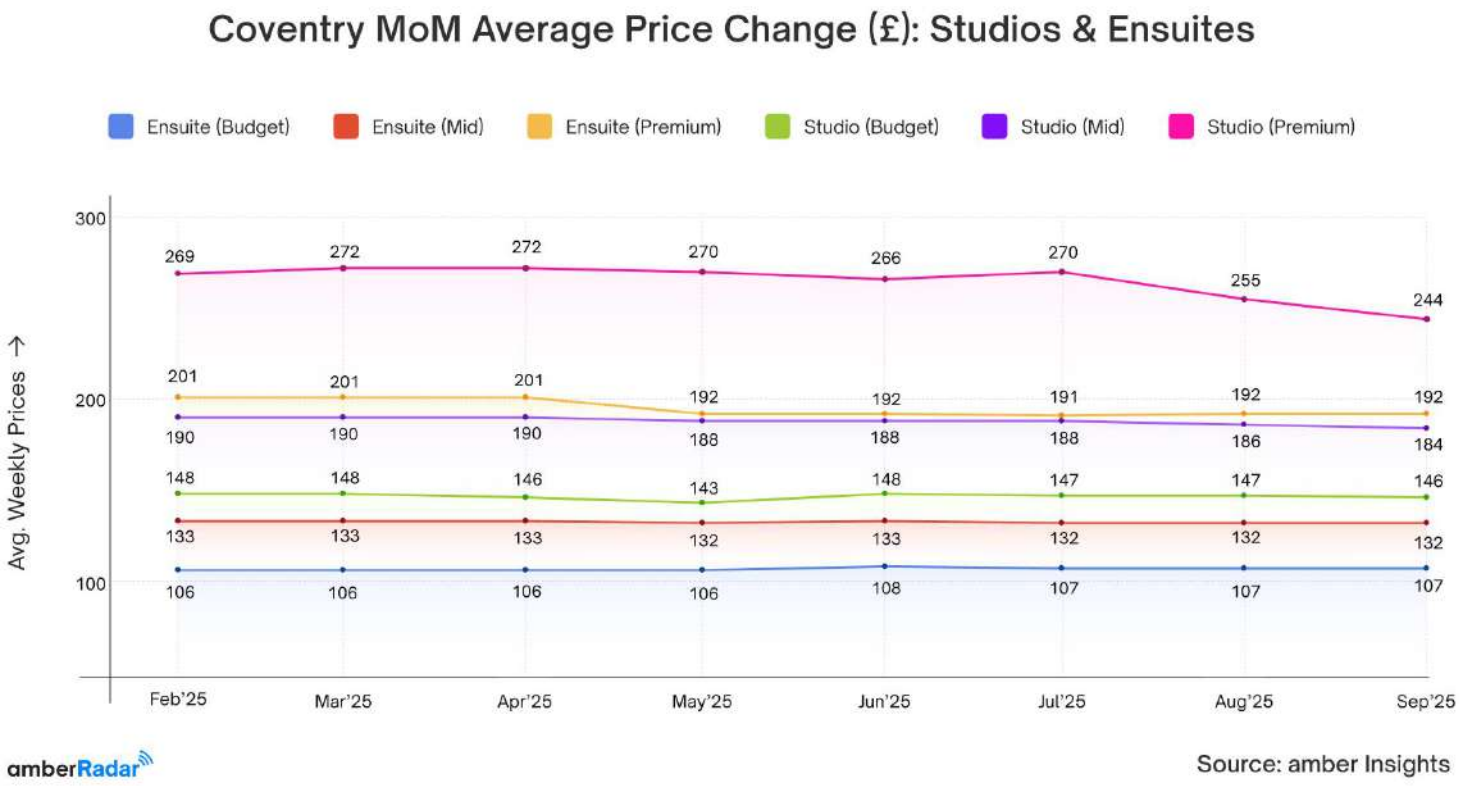
45.80% of students booked Studios in the **£151–£201** range in 2025, an increase from 20.15% last year, indicating a growing demand for **mid-priced Studio options**.



58.17% of students booked Ensuites in the **£92–£142** range in 2025, an increase from 57.50% last year, indicating a slight increase in demand for low-priced Ensuite options.

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Coventry Prices by Room Type: Studios & Ensuites



amberRadar

Source: amber Insights

Pricing Insights: Coventry

- The prices depicted above in the graph are average weekly prices for each month.
- **Ensuite (Budget)** and **Studio (Budget)** prices increased by **+5.94%** and **+3.55% YoY** respectively in 2025-26**,** representing the highest price increase among all categories. This highlights strong demand for affordable accommodation and greater price sensitivity among students.
- **Ensuite (Mid)** and **Studio (Mid)** prices declined slightly at **+0.76%** and **-0.54%** respectively, indicating balanced supply and demand dynamics among comfort-conscious students.
- In contrast, **Ensuite (Premium)** and saw significant price drops at **-7.69%** and respectively, signaling reduced premium value perception and a shift away from higher-priced offerings.
- **Studio (Budget)** prices increased by **+3.55%**, while **Studio (Premium)** declined by **-11.91%**, indicating a narrowing gap between the two segments. A decline in premium prices reflects operators' efforts to reposition and attract demand amid heightened cost sensitivity.

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Pricing Considerations: Coventry

- If your property occupancy is **at par with the market occupancy levels** (as seen on page 6)**,** it is suggested that you **increase the launch prices by an avg 0.36%** as compared to the current prices.

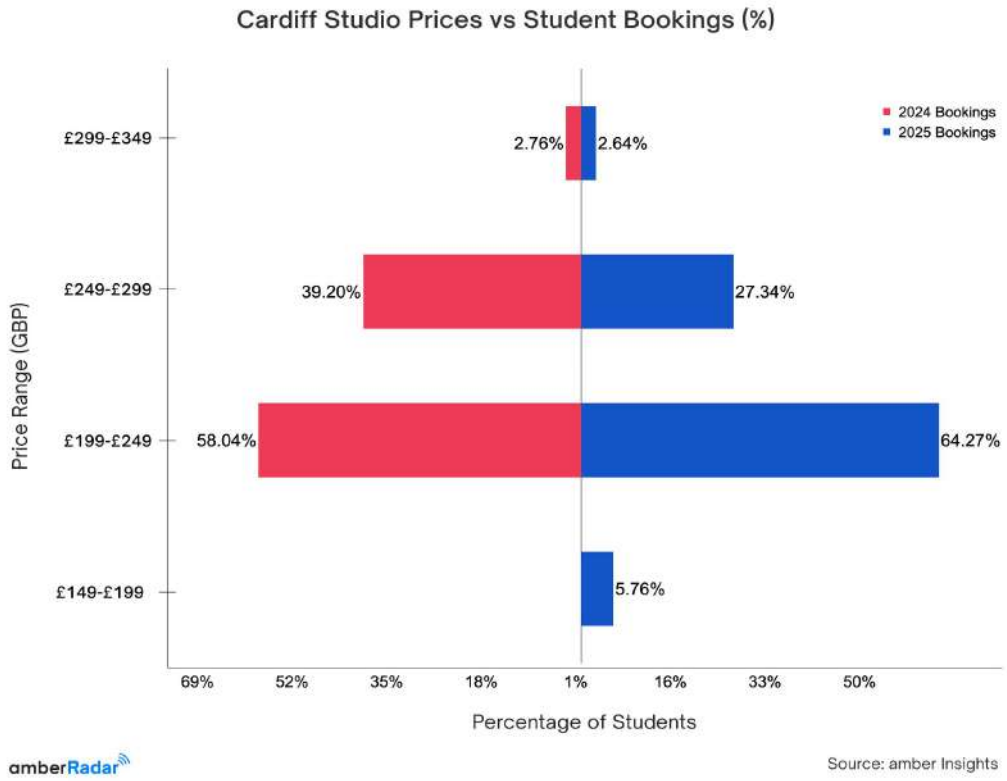
- If your property occupancy is **higher than the market numbers**, you may keep the current prices consistent or **increase slightly** with discounting later for occupancy optimization.

- If your property occupancy is **lower than the market,** consider raising your prices further than 0.36% as compared to the concluding prices of current AY.

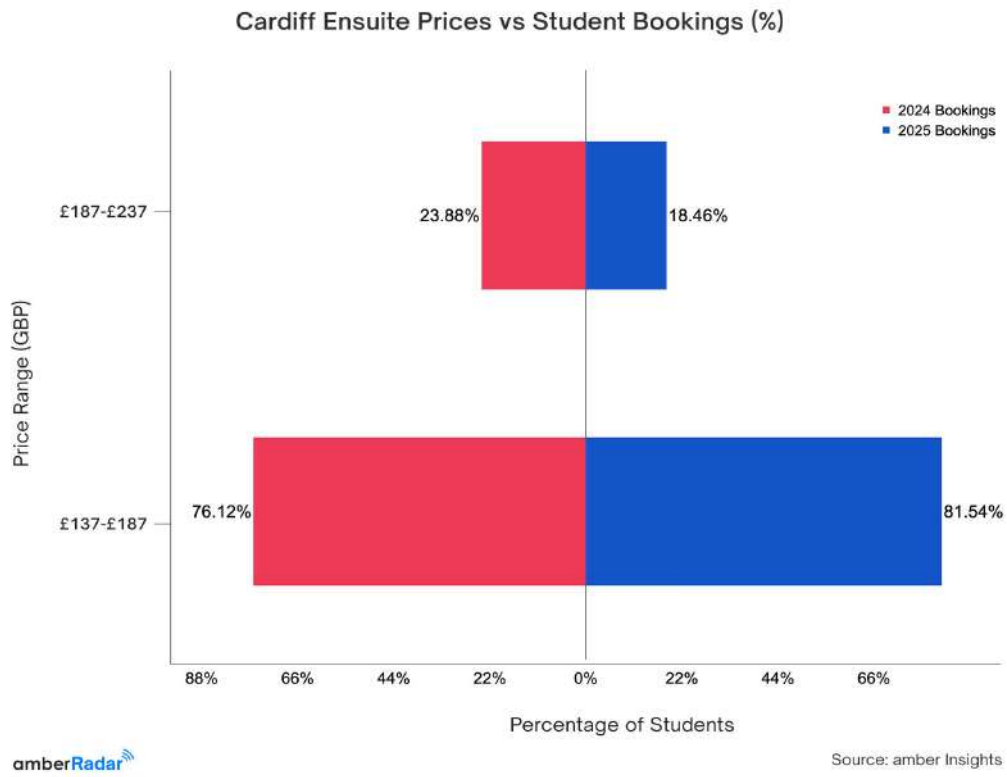
- Coventry saw a modest **0.87%** increase in bed supply for AY 2025–26, accompanied by a **rise in occupancy to 90%** this year, compared with 88% last year.



Cardiff: Student Bookings by Room Type

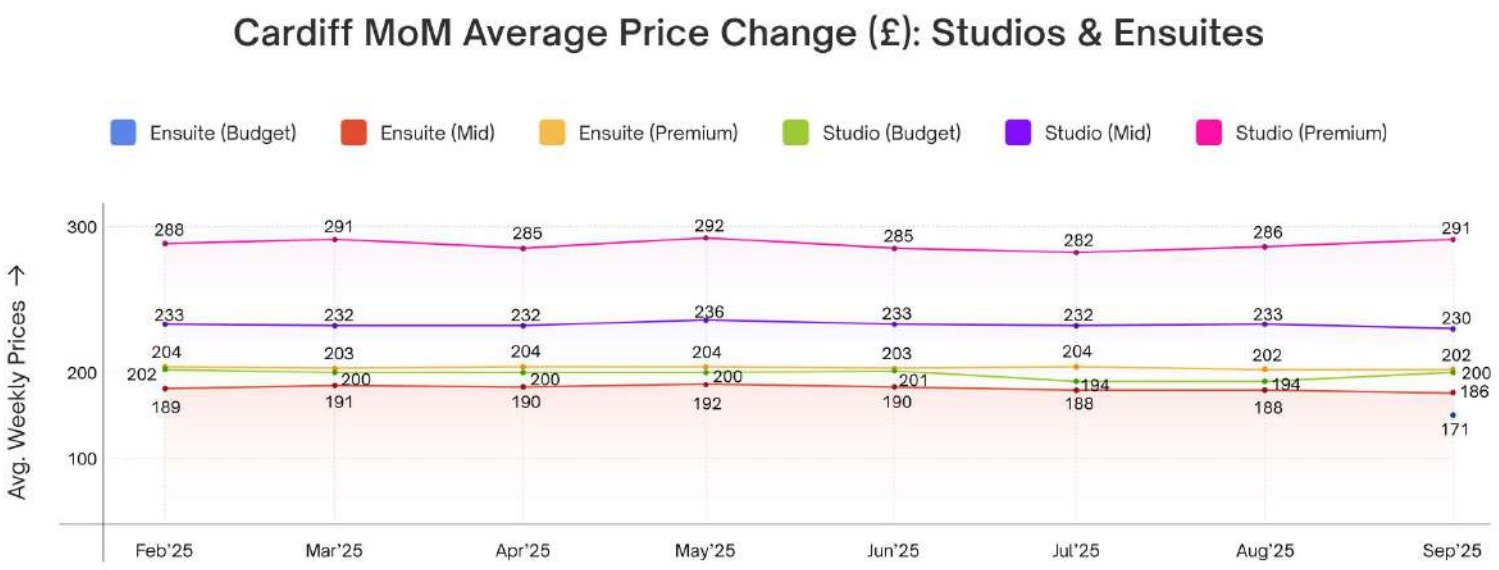


64.27% of students preferred Studios in the **£249-£299** range in 2025, an increase from 58.04% from last year, indicating a growing demand for **low-priced Studio options**.



81.54% of students preferred Ensuites in the **£137-£187** range in 2025, an increase from 76.12% as compared to last year, indicating a increasing demand for **low-priced Ensuite options**.

Cardiff Prices by Room Type: Studios & Ensuites



amberRadar

Source: amber Insights

Pricing Insights: Cardiff

- The prices depicted above in the graph are average weekly prices for each month.
- **Ensuite (Mid)** prices increased by **+2.20% YoY in 2025-26**, indicating strong demand for mid-range Ensuite options, which is also the best-performing segment in Cardiff.
- **Ensuite (Premium)** pricing dropped by **0.98%**, signaling slight decline in prices to meet shifting student preferences.
- **Studio (Budget)**, **Studio (Mid)** and **Studio (Premium)** all declined by **-0.50%, -3.77%, and -3.32%** YoY respectively in 2025-26, demonstrating demand shifts in this category driven by interest for Ensuites.
- **-3.77%** decline in **Studio (Mid)** pricing indicates a shift in student preference toward other accommodation options, highlighting an opportunity for operators to reassess and optimize pricing strategies within this segment.

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Pricing Considerations: Cardiff

- If your property occupancy is **at par with the market occupancy levels** (as seen on page 6), it is suggested that you **decrease the launch prices by an average 0.32%** as compared to the current prices.

- If your property occupancy is **higher than the market levels**, you may keep the current prices consistent or **increase slightly** with discounting options offered later if needed, for occupancy optimization.

- If your property occupancy is **lower than the market**, consider lowering your prices further than **0.32%** as compared to the concluding prices of current AY.

- Cardiff recorded a **4.6% increase in bed supply** for AY 2025–26, accompanied by a **rise in occupancy to 94%,** compared with 91% last year.



UK Student Housing Market Outlook (AY 2026-27)

The UK PBSA market continues to bolster strong growth, with overall **booking occupancy currently at 92.12%**, reflecting healthy demand across key UK cities. While it's slightly below 2024 levels, student demand remains robust, supported by sponsored study **visa clearances ~7% higher** as of (YTD) September 2025.

The UK remains a top choice for international students, even as other European and Asian destinations grow their appeal. With 2026 around the corner, operators will need to closely track shifting demand closely, in this price-sensitive market, delivering value to students through data-driven pricing strategies and tailored offerings that meet evolving expectations.

About amber

Amber is a technology and data-driven student housing platform, partnered with over 500+ property management groups and operators across the UK, Australia, the US, Canada, Europe, and other global education hubs since 2016.

At its core, amber is a strategic revenue and growth partner, simplifying student housing operations for both property operators and tenants. With a focus on domestic & international student markets spanning across 150+ student source countries, ascertaining 9M+ annual website visits, amber helps partners expand footprints globally and secure guaranteed, zero-risk bookings, without additional cost.

Today, amber stands as a leading global student housing platform – partnering with PBSAs, student housing operators, universities, and education consultancies worldwide. The platform hosts over 2 million verified student housing listings across 7+ global regions.



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Global Student Housing Solutions Company

For any questions or further information, reach out to us at **supply-operations@amberstudent.com**