accommodation for students

September 2026 Edition

London student housing rent report

Overview

This report provides an overview of student housing rental trends, based on live listings on Accommodation for Students (AFS). It compares private student housing with purpose built student accommodation (PBSA) to help landlords and letting agents benchmark their properties. This September 2026 edition includes:

- **Average room rents** (monthly and yearly change, by segment)
- **Rent trend** (13 months of average advertised rents)
- **Year-to-date comparison** (2026 vs 2025)
- **City comparison** (how the city sits against the UK market)

Throughout, student housing means the widest range of privately rented student accommodation, including shared houses and flats marketed to students, rather than solely the legal definition of a house in multiple occupation (HMO).

£288	£385	308	170
Average room rent (£/week) ↓ 3%	PBSA average (£/week)	Rooms analysed	Properties advertised

Average room rents

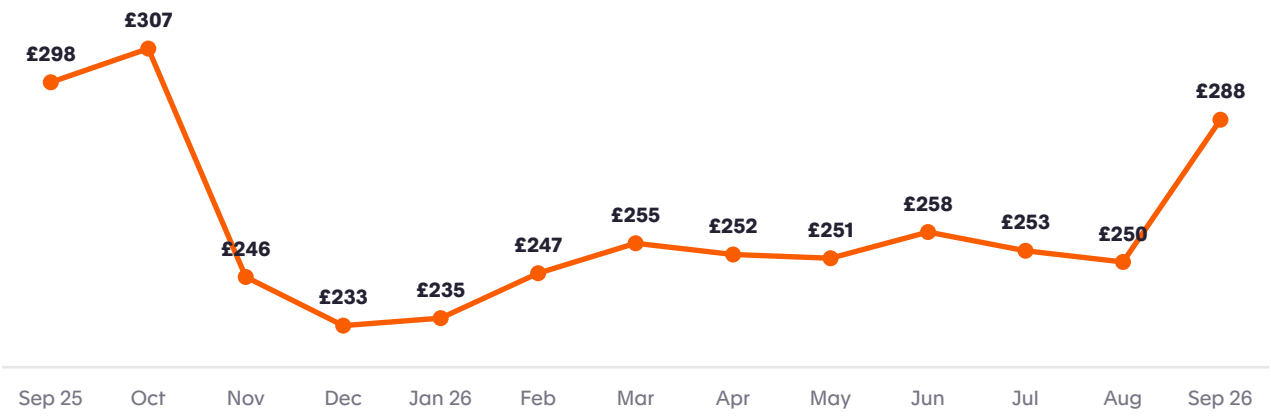
London / September 2026

Segment	Average rent (£/week)	Rooms (n)	Monthly change (vs Aug 2026)	Yearly change (vs Sep 2025)
All student housing	£288	308	↑ 15%	↓ 3%
Bills included	£351	115	↑ 6%	—
Bills excluded	£248	182	↑ 7%	↓ 22%
1-3 bedrooms	£340	180	↑ 4%	↑ 3%
4+ bedrooms	£215	128	↓ 1%	↑ 4%
PBSA room benchmark	£385	657	↓ 1%	↓ 5%

Source: AFS live listings snapshot 2026-09-30 | averages of advertised weekly room rents

Rent trend

London / 13 months to Sep 2026



Source: Average advertised room rent at each month-end snapshot | late-summer months carry a smaller, dearer advertised mix as let stock delists

Market insight

Student housing in London currently rents around 25% below PBSA on an average room basis. Compared with September 2025, the average advertised room rent eased 3%; month on month it was 15% higher, although like-for-like rents moved the other way, so the move reflects a change in the advertised mix. Even among comparable 1-3 bedroom properties, bills-inclusive rooms carry a 21% premium. Rooms in larger houses (4+ bedrooms) list at £125 a week less than rooms in 1-3 bedroom properties.

Year-to-date comparison

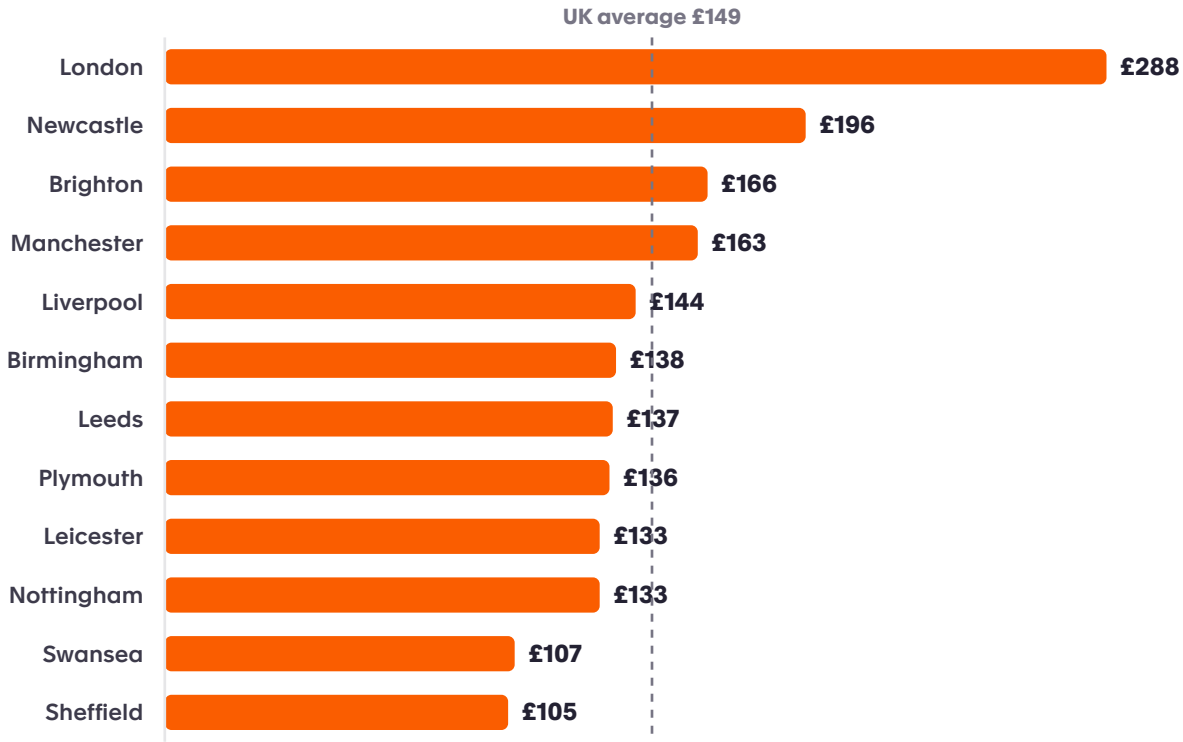
Jan–Sep 2026 vs Jan–Sep 2025

Segment	2025 avg (£/week)	2026 avg (£/week)	% change
All student housing	£247	£254	↑ 3%
Bills included	£262	£321	↑ 22%
Bills excluded	£244	£237	↓ 3%
1-3 bedrooms	£294	£311	↑ 6%
4+ bedrooms	£221	£226	↑ 2%

Source: Average of monthly averages over months with 30+ advertised rooms in both years

How London compares

average room rent / September 2026



Source: Largest markets by advertised rooms, of 27 cities with 100+ rooms | highest Edinburgh £317 and lowest Middlesbrough £99 among cities with 25+ properties | UK average £149

Bills and the advertised rent

Bills-included rooms in London list at an average **£351** a week against **£248** bills-excluded, a headline gap of £103 (+42%). That gap mostly reflects the stock, not the bills. 88% of bills-inclusive rooms are in studios or 1-3 bedroom properties, which price differently. Within comparable 1-3 bedroom properties, bills-included rooms list at £366 against £304 bills-excluded (101 and 73 rooms).

Methodology

- **Where the data comes from.** Live listings on AFS, captured in a daily snapshot. This edition uses 30 September 2026, compared with 31 August 2026 and 30 September 2025.
- **What we measure.** The average advertised weekly room rent. Obvious pricing errors (below £30 or above £1,000 a week) and purpose built student rooms cross-listed as shared housing are removed first, so the figures reflect genuine student houses and flats.
- **Small numbers.** Any figure based on fewer than 30 advertised rooms is shown as a dash. The city chart covers cities with at least 100 advertised rooms.
- **Bills and bedrooms.** Bills included means all bills are included; bills excluded means none are; listings with partial or optional bills packages (11 rooms this month) sit in neither segment. Bedroom bands use the advertised bedroom count.
- **Prices or mix?** Monthly and yearly changes are checked against properties advertised in both periods wherever enough of them overlap. The commentary says so when a change mostly reflects a different mix of advertised properties rather than price changes, and says so too when too few properties overlap for that check to be made.
- **PBSA benchmark.** The average weekly rate for full-year (40+ week) PBSA rooms advertised during the month. The level and its changes are calculated with the same method as the monthly PBSA pricing report, so the two reports agree.
- **Year to date.** The average of the monthly figures, using months with enough data in both years.

Source: AFS live listings | data extracted 27 October 2026 | 308 rooms across 170 properties in London

Need further insights or bespoke data analysis? Contact Sales