

COLIVING REPORT 2021



COLIVING: A MARKET THAT HIDES DIFFERENT PRODUCTS

Let's recap a little bit... What is Coliving? Coliving is a **residential community living model**, which is **part of the BTR (Build to rent) segment**. Generally coliving is a type of intentional community that **provides shared housing for people with similar values or interests**.

Coliving **industry standards have not yet been defined**. The coliving operator model groups different types of products addressing a variety of targets (students, professionals, singles or couples).

DIFFERENT COLIVING MODELS:



The diversity of products on offer has led to an **incorrect perception of what coliving really is**.

Coliving industry standards have not yet been defined.

Product diversity has led to an incorrect perception of what coliving really is.



THE URBAN CAMPUS COLIVING MODEL: A LONG TERM HOUSING SOLUTION

Urban Campus residential buildings are **designed based on the needs and expectations** of its residents, providing a **mid-long term solution for urban professionals**.

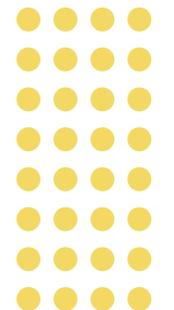
URBAN CAMPUS COLIVING MODEL

- Full buildings between 2,000m² and 8,000 m²
- In primary or secondary European cities
- High-quality housing options, with strong communities
- Centrally located or in emerging well connected neighbourhoods
- All inclusive offer
- Mix of Private (70%) and shared areas (30%)

Urban
Campus resi-
dential buildings,
long term housing
solutions for ur-
ban profes-
sionals.

OUR STORY

- 
- 2016 ● Urban Campus was **founded** in Paris.
The purpose?
Redefining the way we live together in cities
 - 2018 ● **First Coliving opened** in Madrid, 1st Coliving operator in Spain
 - 2019 ● **Second Coliving opened** in Madrid
 - 2021 ● **Global Coliving Awards Finalist**
 - 2022 ● **+ 30 Projects in Development** in Europe



A GROWING MARKET

Nr. of applications

2000

1500

1000

500

0

2018 Q1

Q2

Q3

Q4

2019 Q1

Q2

Q3

Q4

2020 Q1

Q2

Q3

Q4

2021 Q1

Q2

Q3

Q4

560

First lockdown

670

2nd lockdown

1700

The demand for Coliving is growing, with an upward tendency

How big is the Coliving demand? The demand for Coliving is **growing**, with an **upward tendency**.

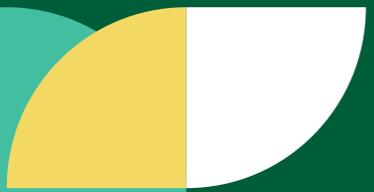
In PWC's 2020 Emerging Trends in Real Estate, coliving was ranked the third-highest prospect sector for Investment and Development in Europe.

We have seen an **increasing number of leads applying to join our spaces since our opening in 2018**.

In 2021, in Madrid, we have received on average, **1150 leads per quarter**, with peaks of almost **1700 leads in Q3**.

Did Covid have an impact on the demand? While we experienced a small dip in the growing tendency, demand quickly increased, **proving the model's stability and resilience over other alternatives**.

Covid has made coliving an even more attractive model



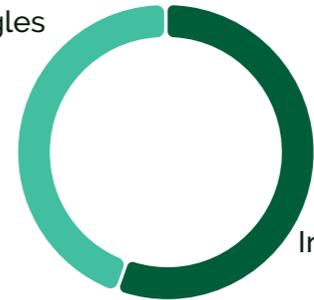


DEBUNKING THE MYTH

Is coliving really only for students who are single?

Definitely not!

46%
Singles



54%
In a relationship

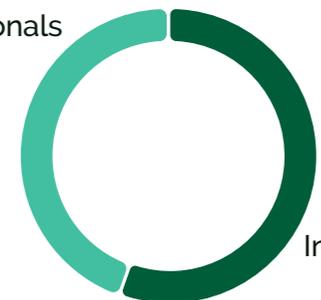
92%
Professionals



33
years old



45%
Nationals



55%
Internationals

We mainly host **international professionals** from over **35 countries** aged between **25 to 45**, with **54%** identifying as in a relationship.

A LONG TERM RESIDENTIAL SOLUTION

There are an array of operators and products on the Coliving scene. Here at Urban Campus we believe that coliving is a long-term residential solution.

12 months

Average **duration of stay**
(growing year by year)

46%

Residents **extend**
their stay at Urban Campus

3,4 years

Longest duration of stay
(and still going)



RESIDENT SINCE THE OPENING IN 2018

Diana Loaiza



I've been **living in Urban Campus for about 3 years**. The first 2 in the Mellado Coliving and the 3rd one in the Malasaña one.

The **facilities are great everything is very modern and new, you can have the private space you choose**, either a comfortable room with private bathroom or a complete studio just for yourself. (I've lived in both)

The **common areas include a coworking area with chill out zones perfect to work or spend time with others**.

The Mellado one has a gym which is great because you won't even need to leave home to workout.

But the **best part for me as a foreigner living in Madrid, is the community you build, you get to meet and become friends with so many amazing people from all over the world**. It is a great space to network, to get to know interesting people with different stories and different projects.

In my experience **so many great friendships have emerged in this 3 years as well as so many good memories**.

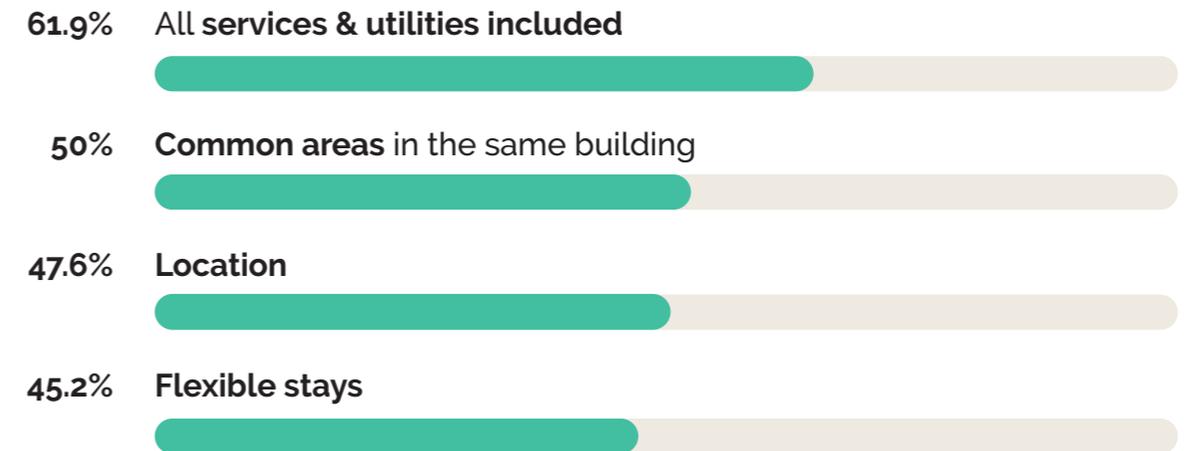


CONVENIENCE: #1 REASON TO CHOOSE COLIVING

Convenience is the number one reason to choose Urban Campus Colivings over other housing alternatives:

- 1** An all inclusive offer of services and utilities like Wifi, electricity and even regular cleaning are the TOP reasons to choose our coliving spaces.
- 2** 76% of our tenants save time in their day thanks to our all inclusive services.
- 3** The second reason is our common areas. **Tenants have even prioritised high quality common areas and inclusive services, over location.**

WHY OUR RESIDENTS CHOOSE COLIVING?



High quality
common areas
and services are
more important
than location

COMMUNITY: THE #1 REASON TO STAY

Convenience is the #1 reason to move-in. But **Community is the #1 reason to stay.**

Why? **95% of our residents feel happier and 85% feel less lonely since living at Urban Campus**

How did we achieve these results?

1 activity per day
(That's 365 a year!)

People participating in 1.5 activities per week

45% of people feel at home after 1-2 weeks

Our residents have met an average of 44 people and have made 4.6 close friends

1 activity per day in our spaces

95% of our residents feel happier

45% Feel at home after 1-2 weeks

SOCIAL IMPACT OF OUR COMMUNITY

7
NGOS SUPPORTED

22
LOCAL BUSINESSES SUPPORTED



IMPACT OF COLIVING ON QUALITY OF LIFE

Our coliving spaces have a direct impact on the daily life of our tenants.

The overall experience at Urban Campus has an **average rating of 8,5 out of 10 vs. an average of 5.5 in other accommodation options in Madrid***.



The overall experience at Urban Campus is rated 8,5 / 10



Noemi Marelli



Urban Campus is my home I've been living here for almost a year, and will stay for sure longer. I love living here because they **make life so much easier (all included in 1 bill) + the beautiful community you join when you choose to live here!**

We are people from all over the world! Young professionals, entrepreneurs, masters/PhD students... a **very enriching community**. UC organize great activities for us to stay connected, learn and enjoy together! (Biweekly community dinners, sports, yoga, interesting seminars, BBQs at our gorgeous terraces, and much more!)

I also appreciated very much the access to the communal areas: coworking space! The big living room-kitchen, music instruments (including a piano!), TV and video games room... **just perfect**

If you are looking to **meet new people in Madrid and want to come living in a great comfortable place, Urban Campus is your place! As it's mine**



Harringer



First year in Madrid I lived thursday till friday **in a hotel. Very depressing.** Then I was accepted in **UC Malasaña. A really life changing event. Very pleasant.** Nice people, nice flat, nice ammendities. The community and member engagement is worthy any extra cent you have to pay. **Very recommendable.**





Sources:

- Interviews conducted in November and December 2021.
- Residents data was gathered from Dunbar, our CRM and booking platform.
- Reviews were gathered from Google reviews.

The interviews gathered answers from 51% of our members, with responses being anonymous.