

REPORT

COLIVING & LONGSTAY



THE
REMOTE
LAB

ABOUT DESTINATION ÖSTERSUND

Destination Östersund is wholly owned by the business community. We market Östersund nationally and internationally to visitors and to attract meetings and major events to Östersund. The tourist center inspires and informs visitors before and during their stay. We work to create an attractive and welcoming city center, where we carry out events and activities all year round. Since Östersund is the only city in Jämtland, we also work actively with site development in the larger Storsjö area.

During 2021-2022, Destination Östersund will implement the project "New target groups for the Östersund region" - a project with funding from Region Jämtland Härjedalen, Destination Östersund, Östersund Municipality and Mid Sweden University. The project's goal is to strengthen the three travel reasons Long stay, outdoor and test environments. The report has been produced as a knowledge base for the development work for Long stay as a new target group.

<https://destinationostersund.se>

ABOUT THE REMOTE LAB

The Remote Lab is a knowledge and development node for the future of remote work. distance-independent working life of the future. We work to make it easier for society, organizations and people in the transformation from the norm around the physical workplace, to a distance-independent approach in both societal development and organizational development. We believe the foundation of this is knowledge, and The Remote Lab works actively to stimulate more studies and more research in the field of remote work. Through accumulated knowledge, The Remote Lab offers services such as external monitoring, strategic management support or Attitude Scans as well as training and shorter sessions for companies and organizations.

<https://remotelab.io>

BACKGROUND

The idea of sharing amenities and building a community to live with has existed for millenia. From hunter-gatherer communities to the Israeli kibbutz and the start of the cohousing movement in 1980s Denmark, the idea of shared living is not new. However, interest in modern coliving is emerging from a resurgence in interest in the sharing economy (alongside services such as Airbnb and Uber - putting idle assets are put to use). This sharing economy interest is coupled with increases in: focus on sustainable living; the cost of living; and digital nomadism (enabled by the surge in remote working). The new coliving format takes the form of businesses offering community-based spaces with people determined to grow with each other. Residents live, socialise, eat, and sometimes even work together in spaces with private and shared rooms, communal spaces and occasionally coworking spaces.

Coliving is a relatively new concept where visitors are offered accommodation in hotel-room-sized rooms, with or without bathrooms, and access to a shared kitchen, living room and community activities. In larger cities such as London, this has grown strongly as a result of the current housing crisis, or where people have joined the global movement of digital nomadism, which encourages a flexible lifestyle. The rent is often cheaper than renting an own apartment, and there is often also access to common workspaces so that the residents can have a desk, meeting room and internet connection to be able to work remotely. The target group for co-living often has few possessions, living in an international context with the opportunity and willingness to live in many different areas.

Coliving is also emerging as an increasingly popular form of shared housing. This housing can come in the form of shared dorms (student-focused or not), buildings, or even private flats - but are usually based around sharing of some form. This may include shared interests, values and intentions or even just spaces and furniture. The most common form of coliving is based around a single building, where residents share amenities or interests. The benefits of coliving revolve principally around reduced living costs, and easy access to amenities such as furniture, wifi, electricity, kitchens etc. - under a single living charge.

Google trends and news show a constant increase in coliving since 2015, with 95% of news articles are written post-2019. Furthermore, investment into coliving is increasing: Deutsche Bank have recently invested into The Collective, and COLIV have established the first publicly traded coliving fund.

Since the outbreak of the pandemic, interest in co-living and long stay concepts has increased, especially among city dwellers who want to get away from isolation.

It is widespread today in many cities and communities, ranging from capitals such as London and Stockholm, to smaller cities in the Canary Islands. In Sweden, we find it in Åre, in the concept Stay by House Be among other places. During the pandemic, a new phenomenon of "covid refugees" emerged.



Covid refugees are people who move to countries like Sweden, where the restrictions are easier than in their home country, or who move to warmer climates and nature to escape lockdown. The trend may be temporary, but there are many indications that it may continue in the longer term, as the infrastructure is improved and the focus on the target group becomes stronger - their lifestyle (remote working, traveling) is the same as that of the ever-increasing digital nomad group. These individuals often choose to own fewer things, which opens up for other emerging sharing services, such as car- or bicycle- pools that contribute to a stronger local economy.

This environmental report addresses the latest interesting signals regarding the development in coliving and longstay, as well as different types of concepts, the most important target groups and external influences linked to the development of coliving. According to a recent report from the real estate company Cushman & Wakefield, the number of units offered by large coliving companies in the US will triple in the next few years and we can see a similar development in many other parts of the world.

This report addresses the most recent signals of interest in developing coliving, as well as the different types of existing coliving, the key target demographics, and the outside signals tied to the development of coliving. According to a recent report by the real estate firm Cushman & Wakefield, the number of units offered by major co-living companies in the US alone is going to triple over the next few years.

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<https://www.theguardian.com/cities/2019/sep/03/co-living-slutet-av-urban-ensamhet-eller-cynisk-foretags-sovsalar>
<https://www.tf1.fr/tf1/sept-a-huit/videos/confinement-ces-francais-qui-font-du-teletravail-depuis-les-iles-kanarieoarna-03256659.html>
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<https://techcrunch.com/2020/09/08/9-proptech-investors-talk-co-living-home-offices-and-other-pandemic-trends/>





DRIVERS OF CHANGE

To understand how the future could look, we identify "Drivers of change" - big influences and trends that are reshaping today's society. Drivers of change are comprehensive, long-term, underlying directions of change which shape the future. They should extend over several areas to be as diverse and comprehensive as possible. Together with "Signals of change" they are indicators and building blocks for creating realistic predictions.

IDENTIFIED DRIVERS OF CHANGE

- Globalisation (an online world)
- Digitalisation (from analog to digital)
- Developments within Telecommunication, 5G, Automation and AI
- An increased acceptance of remote work and flexible working hours
- Climate change
- Pandemics
- Decentralisation
- Sharing economy
- Digital nomadism
- Sustainability and circular economy



SIGNALS OF CHANGE

Working with "Signals of change", or signal scanning, is a method developed by the Institute for the Future, which is a research and educational organisation in futures research. The IFTF's mission is to build more foresight capacity in the world by providing tools and resources to help people anticipate the future in order to make better decisions today. Collecting and scanning for "Signals of Change" is one of the most commonly used tools for sketching likely future scenarios.

A "Signal of change" is defined as a new small or local innovation, such as a new product, service, behavior, initiative, policy, data point or technology, with the potential to scale up and influence other places, people or markets. Specific events or innovations that we see today and instinctively feel will take us in a new direction. The signals visualize phenomena earlier than traditional social science methods and are used as indicators to show that a forecast or scenario is probable.

Continuously searching for signals helps us to develop the habit of collecting observations when we read news, research or absorb information in everyday life. For research purposes, signals are documented with both a description of phenomena ("What") and interpretation of possible consequences ("So what").

IDENTIFIED SIGNAL CLUSTERS

- Concepts within Coliving and Longstay
- Coliving and local development
- New Demographics
- New Development Patterns

CONCEPTS WITHIN COLIVING & LONGSTAY

Coliving is any building in which unrelated people live together. But this can encompass many things: from smaller or larger collectives, all the way to long stay hotels. Each is tailored at a different type of audience, but all are increasing in popularity: the future of living is in coliving, especially in bigger cities.

EXTENDED STAY HOTELS

WHAT: Extended stay hotels are being argued by some as “the future of coliving spaces”. The focus on shorter-term residents than the major coliving spaces, but offer many of the same advantages, although at around \$60-130 per night, prices are more similar to that of a hotel than a long-term coliving space. Sometimes seen as “aparthotels”, these hotels will often offer minimalist kitchen facilities (sometimes better-equipped and shared), as well as laundry facilities, parking, the ability to bring pets, and other added services: breakfast, lunch, valet services, gyms, or deals on car/bicycle hire. New emerging aparthotels such as StayApt have already expanded from one to 4 establishments under 2020, with 8 under construction and 25 in planning before the end of 2022. These hotel services exist in all formats, from basic hostel-style accommodation, to airbnb style services and luxury “boutique hotel” accommodation. The Forenom company has successfully expanded in the Nordics, managing both buildings and private apartments, to address the need for longer-term accommodation and serviced apartments, especially in the case of business travel and large company displacements. The aparthotels/extended stay hotels provide everything of a longstay concept, but often do not provide the communal spaces of coliving, thereby missing out on the community-building and networking opportunities of coliving. The service is similar, but caters to a different demographic.

SO WHAT: Throughout the first quarter of 2021, hotel demand decreased 11.9 percent, but the extended-stay portion of the hotel industry rose in demand by 8.6%. Throughout 2020 and 2021, the extended-stay segment of the hotel industry has proved to be both pandemic and recession-proof. Extended-stay occupancy has been lower in 2021 than any first quarter since 2009, but average extended-stay occupancy is still higher than all other segments, so this can likely be put down to the pandemic. Economy extended-stay hotels continue to fare better than mid priced and upscale brands. An extended stay hotel is even under development in Östersund, as Hotel Zäta expects to welcome mid-term visitors from later this year. Longstays require less management than other types of coliving spaces, since residents do not interact or share many spaces, and stays are often comparatively short in duration.

<https://www.op.se/2021-06-11/hotell-zata-byggs-om-ska-bli-ostersunds-forsta-langtidshotell>
<https://affordablecorporatesuites.net/why-extended-stay-hotels-are-the-new-co-living-spaces/>
<https://www.hotelmanagement.net/operate/extended-stay-leverages-strengths-continued-staying-power>
<https://www.stayapt.com/>
<https://www.kasahotels.com/>
<https://www.forenom.com/about/>



COLLECTIVES

WHAT: Collectives have been around for a long time - more or less self-organised, these can be anything from houses shared by 3 individuals, to privately-owned buildings housing 20+ people. The key difference between businesses running coliving/long stay concepts and collectives is that collectives are closer to a normal rental, with fewer added amenities, usually cheaper costs, and a larger focus around the community members. Collectives often share kitchens and bathrooms, and are formed around key lifestyle clusters: e.g students, vegetarians, creatives, LGBTQ+ friendly environments, or hobbies and interests. Members often have to be approved by the community before they can join. In larger cities, collectives are increasingly attracting young professionals, new arrivals and students, as well as those looking to live with like-minded people and make friends. The focus on relationship-building among residents is usually quite strong.

When asked, respondents to a survey on “the shared house of 2030” responded that their main interest in sharing a house would be the social life - more interesting than the saving on rent, common facilities, or access to otherwise unaffordable neighbourhoods.

SO WHAT: As a complete contrast to long stay places, collectives focus on meeting the need for community and making friends in new places. However, both cater to the need for cheap and easily available accommodation in a new town. The demand for living in collectives is high, indicating the need for community and social connection are something people are interested in. In the development of a long stay concept, the need for social interaction should be accounted for.





RURAL COLIVING

WHAT: SocialBookers.co (amongst other platforms) offer a summary of rural coliving spaces available, for example, in Europe. A quick search on this platform will propose many options in Spain, Serbia, or Estonia, amongst others. The spaces here may be referred to as “destinational” coliving, characterised often by shorter stays, or attracting nomads. People looking for a change of lifestyle, or being closer to nature would benefit highly from coliving spaces in places even as rural as remote Jämtland. These coliving spaces often offer services which allow the residents to explore the local nature and take advantage of local produce and lifestyle. Very often, there will be a focus on building community within these spaces, with group activities or meal nights for residents.

SO WHAT: With increasing opportunities for remote work, people are wanting to get closer to nature. This has been noticed through permanent relocation patterns since the pandemic, but also through the emergence and popularity of rural coliving and coworking spaces, particularly within nomad communities. Websites such as NomadList.com list the best global cities for nomads to live in, ranking them based on factors such as internet connectivity and availability of workplaces. In this global ranking, a smaller city such as Ericeira in Portugal can be ranked 4th - principally attracting nomads for the surf opportunities. Capitalising on what your region can offer will attract people to the coliving and longstay spaces. There is a good opportunity for rural development, and visible interest in this.

<https://socialbookers.co/rural-colivings-in-europe/>
www.Nomadlist.com
<http://sun-and-co.com/>
<http://coconat-space.com/>
[http://restation.co /](http://restation.co/)
<https://www.roam.co/places/ubud>
<http://swissescape.co/>
<http://limelivingspaces.com/>
<https://www.sende.co/>
<https://ruralco.live/>

LARGER BRANDS

WHAT: The most common type of coliving - and what people often think about when referring to coliving - is “residential” coliving. These places are associated with longer stays (a few months to a few years), are often in urban areas, and can house many more residents than the rural/destinational coliving spaces. Residents are attracted to these residences by their flexible offerings, their ease of access (the “plug and play life”, where one bill covers most needs), and the opportunity to meet people from an environment other than work or hobbies. Many of the larger coliving organisations cater to young professionals, looking to live affordably in big cities.

These spaces can often feel more depersonalised than the rural coliving hubs: an apartment block with 100 rooms and shared kitchens will not provide the same social environment as a small house where residents regularly share meals.

SO WHAT: Following increasing costs of living, there is an increased need for affordable housing, as well as an increased interest in living sustainably, and not feeling alone in big cities. The demand for such coliving spaces is projected to increase, but the biggest challenge faced in the industry at the moment is the difficulty of scaling-up internationally. Many chains have become well established and opened multiple residences within one country, but not many have become real global organisations.

However the sector has grown enormously in the last few years. There are already around 9,000 co-living beds available in Europe, with 30,000 either being built or in the development pipeline. 79% of co-living buildings in the pipeline have 200 bedrooms or more - and many investors are interested and investing in the growth of this sector - projected to see major growth in the coming years. Research has also established that co-living is a valuable addition to real estate portfolios, generating manyl economic, societal and environmental benefits.



COLIVING & LOCAL DEVELOPMENT

The establishment of a coliving space in a city or region can attract a new demographic of visitors, and boost local business if these are adapted to the new circumstances, either in partnership with, or alongside the coliving service. Coliving provides the convenience of shared spaces with integrated public services, transportation services, etc. Smaller living spaces become practical, rentals and commute are more affordable, and money saved goes back into the pockets of residents, who use it to support businesses.

VALUE-ADDED SERVICES

WHAT: One of the key benefits of longstays and coliving spaces are the easy-to-access amenities provided by the space. This could be as simple as a furnished room, kitchen and wifi, but often also extends to local partnerships with e.g. restaurants, coworking spaces, bicycle rental etc. Hello Alfred have developed a service for coliving space owners to add services for their residents: an easy platform for organising events and booking laundry, all the way to a concierge service, dog-walking, buying flowers for the rooms, home cleaning, snacks services and more. Hello Alfred have partnered with local service suppliers and national providers in each location they are in, allowing an easy way for coliving spaces to provide residents with local service benefits.

Certain coliving spaces, such as Mokrin in Serbia, even offer 3 homemade meals a day, 24/7 workspace and ensuite bedroom, movie nights, bike rides, pools and a gym. More rural spaces often offer discounts on local restaurant meals, or activities in the area. Often suggested as useful value added services are: basic food supply, transport partnerships (bikes, cars), and discounts on local activities or coworking spaces, etc. Larger coliving spaces often organise resident events or parties, or regular communal meals. The nature of the value-added services is often very dependent on the location and target demographic of the long stay space.

SO WHAT: Most coliving and longstay services offer some form of partnership with local or national businesses, to add to their convenient offering for residents. There is desire for added services, and ways for this to be integrated easily into coliving, clearly adds value to the local community as well as to the coliving business. The services offered can also be used to attract customers: if the main attraction of the coliving location is based on the local lifestyle, then adding services such as ski or bike rental (or discounts/partnerships with providers) can be a factor to attract clients to the longstay rather than a hotel. Whether or not meals and transport are easily accessible is another factor which could make a coliving space stand out from other local hotel offerings, and is relatively easy to incorporate.



COMMUNITY BUILDING

WHAT: Træna is a small island with 500 inhabitants, 60 km from the mainland of North Norway. The island stimulates its local development by inviting international actors to live there temporarily, for a shorter or longer period of time, and helps them to develop projects in various categories such as art, gastronomy, business, anthropology or photography. The goal is to develop the island community in an innovative, creative and sustainable way, with contributions from both residents and visitors.

Similar places have been established on Lofoten, with the Arctic coworking lodge (to attract surfers, skiers, climbers and hikers), with a cafe for teleworkers to exchange and network. Mokrin House, in Serbia, has established itself as a space for people to stay from a few weeks to a few years, with the aim of building a living coworking community. Residents are offered a large coworking space, courses and development events, networking events, as well as social events (film nights, pool nights etc.) and fully catered meals, to create a feeling of community within the residents, and encourage them to stay. Bansko in Bulgaria has become a city recognised for its digital nomad skiing community, with long stay tourists coming and contributing to the local ski community industry during their residences, even returning to Bansko to later settle - they have even managed to establish an annual "Bansko Nomad Fest" to exchange knowledge and among the digital nomad community, and develop the local area.

SO WHAT: Small communities actively benefit from the distance work and the trend around digital nomads, or long stay visitors by finding their own ways to attract and benefit from temporary residents who can participate in the development of society. In this way, they get both economic development and attractiveness as well as a creative and versatile "brain gain". All individuals who come there can contribute to local development through innovations or development for the benefit of the local community, while appreciating the lifestyle and activities of the various places. Through this grassroots-driven development, the places also get attention that benefits their marketing and they are often out and about around the world talking about how they have built up their community around the development of the place.

<https://airtraena.wordpress.com/english/>
<https://svenskanomader.se/arbetsliv/arctic-co-working-lodge-lockar-aventyrliga-digitala-nomader-till-lofoten/>
<https://www.mokrinhouse.com/about-us/>
<https://banskonomadfest.com/>
<https://www.coworkingbansko.com/>





TOURISM

WHAT: Through a government initiative, the Portuguese island of Madeira has built a community entirely focused on digital nomads. This program has partnered with hotels and local longstay companies, offering residents: no deposits (for reservations under 6 months); online lease signing, in their language; flexible cancellation policy; all utilities inclusive.

There, they offer 100 places to incoming temporary residents. 5,000 people have already submitted applications for the initiative, which aims to bridge the seasons of the tourism industry and reduce the region's dependence on short-term visitors. The project has also partnered with car rental companies to create a package for visitors and offers them free workspace in the local cultural centre, as well as access to a Slack community and free WIFI from 8:00 to 22:00. The success of the longstays has led to the successful merger of Flatio and Nomad X - two nomad-focused longstay concepts in Madeira, who have benefited from increased interest even during the pandemic, and are continuing to grow.

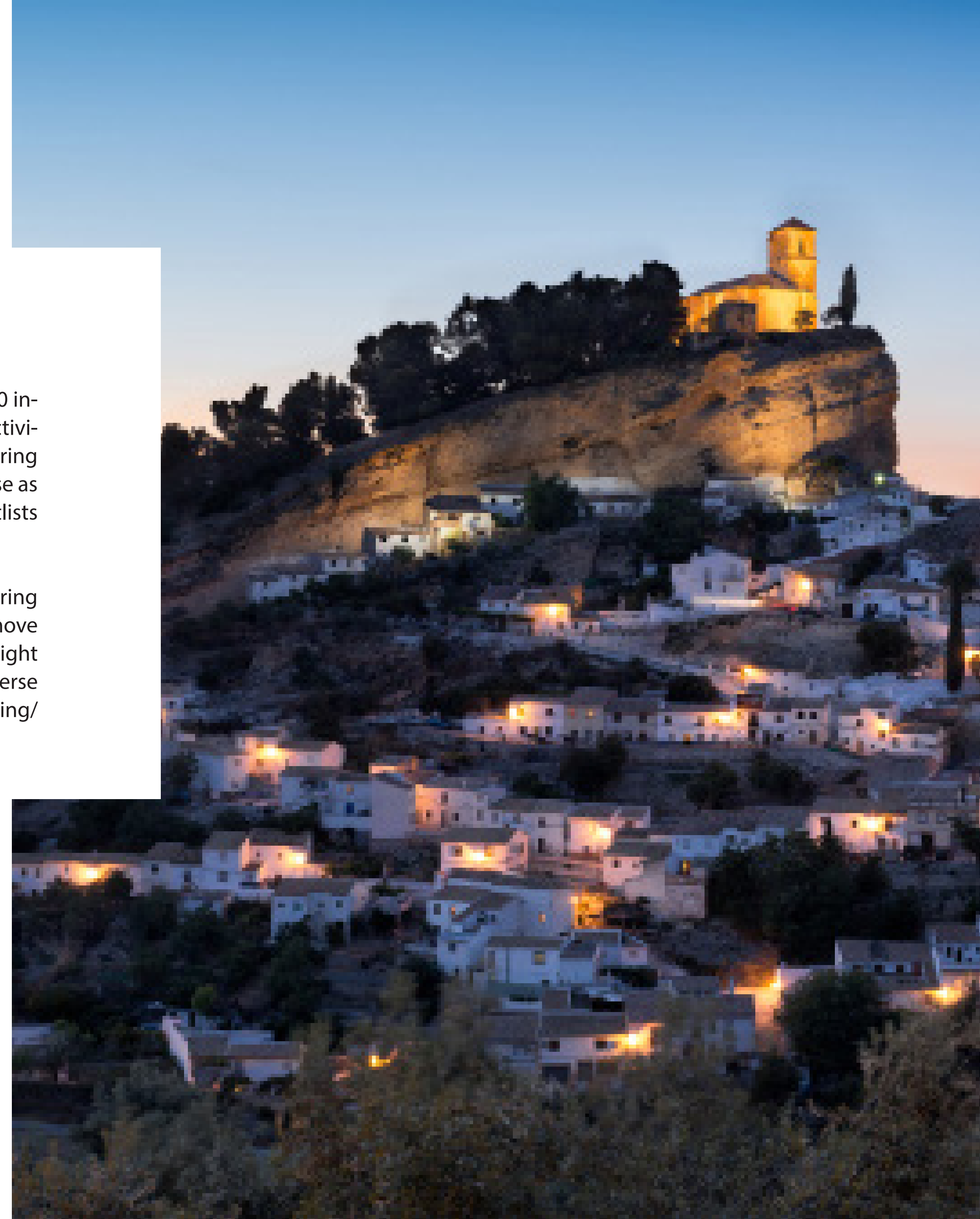
SO WHAT: Public Investments are being made to ensure that regions that have been completely dependent on incoming tourists can receive visitors who generate income for longer periods and even during the low season. Regions and cities have understood that a restructuring of the tourism industry is necessary to be able to diversify sources of income, as many have been hit hard by the reduced travel during the pandemic. To cater to this new tourism industry relies on hotel and real estate companies adapting to longstay offerings, coupled with local community partnerships for extra services.

<https://www.euronews.com/travel/2021/01/29/europe-s-first-digital-nomad-village-is-opening-on-a-tiny-volcanic-island>
<https://www.flatio.com/>
<https://digitalnomads.startupmadeira.eu/long-stay-madeira-islands/>
<https://nomadx.com/>

RURAL DEVELOPMENT

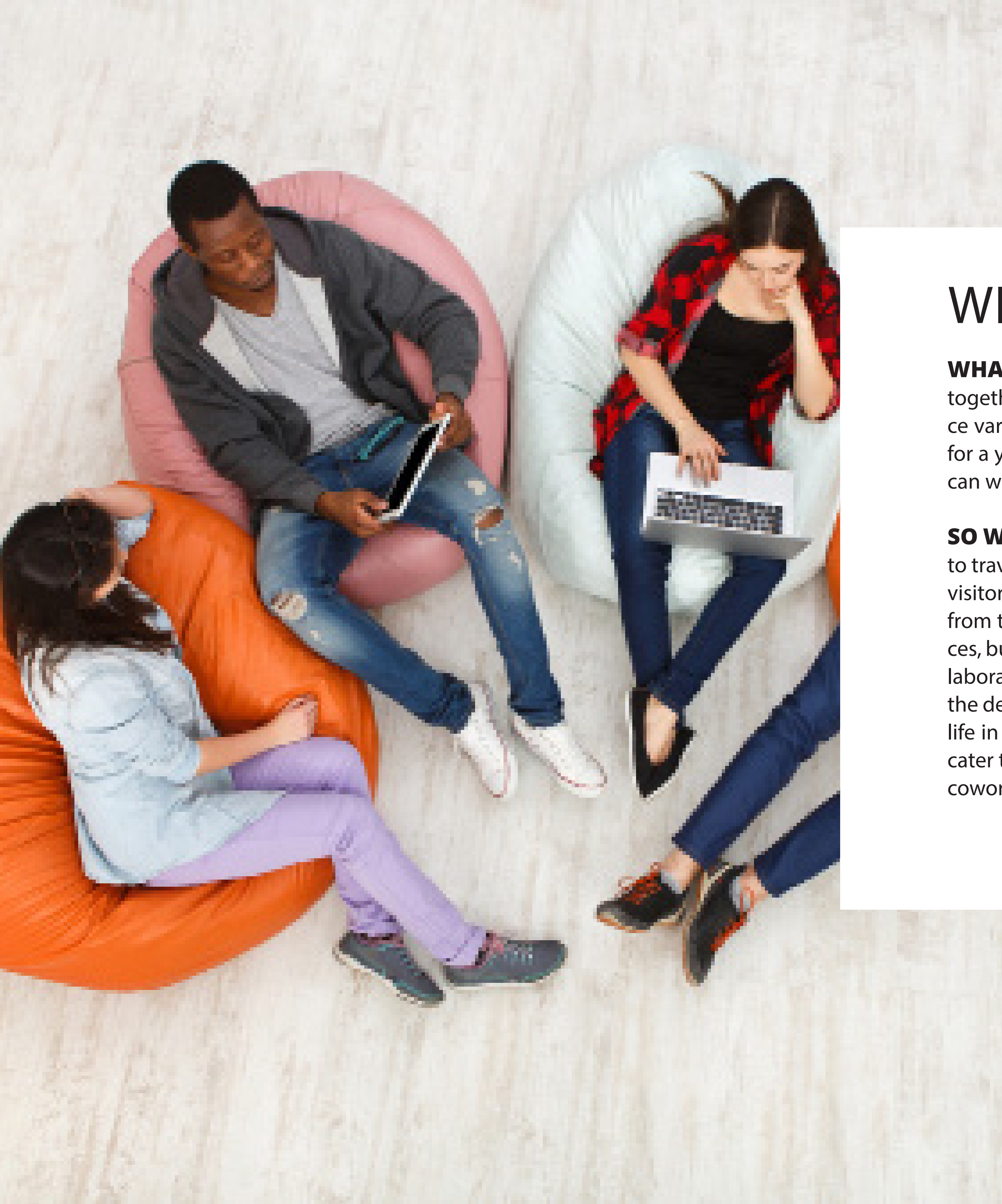
WHAT: Coliving spaces such as RuralCo, in northern Spain, have established themselves in areas with only 500 inhabitants. These spaces offer services such as partnerships with local restaurants, local produce, and guided activities (climbing, hiking, etc.). Sende coliving space, in a village of 20 inhabitants, encourages activities like exploring other local villages, providing food from local markets, and organising international meetings in topics as diverse as graphic arts, video game design and peacebuilding. These coliving spaces are very often fully-booked, with waitlists for interested residents.

SO WHAT: Building a coliving space in a village with around 500 residents and not much tourist influx can bring new development and investment in the local community. There is much interest from individuals wanting to move to more remote locations, and places such as RuralCo and Sende demonstrate that a coliving space, with the right coworking setup, will attract people to regions which may otherwise be underdeveloped, and boost trade in diverse aspects of the local economy. An increase in remote working possibility is driving up the interest in rural coliving/coworking spaces, making this an up and coming market for coliving.



NEW DEMOGRAPHICS

Most coliving will cater for people wanting to stay somewhere between a few weeks and a few months. Some spaces also cater for longer-term residents, looking for somewhere to live for a few years while in an expensive city, for example. This section addresses the different growing demographics, increasingly interested in coliving catered to their needs.



WIFI TRIBE

WHAT: The "Wifi-tribe" is a group of digital nomads who travel around the world together, share a home and work together. Participants pay a membership to belong to a group when they travel and to cover housing costs. The price varies depending on the continent and accommodation, and the group chooses which cities they want to visit for a year. "The Tribe" builds the sense of community by dividing the participants into groups of 12-25 so that they can work and venture together in the different countries.

SO WHAT: Communities that are independent of physical places are built up in several places by people who want to travel and experience different parts of the world. The tourism industry has been hit by a sharp decline in holiday visitors due to the corona pandemic, but the potential for teleworkers is growing. The cities that will benefit most from the new target group of long-term visitors are those that invest in collective housing and collective workspaces, but which also have the ability to see and create collaborations with existing communities on the site. These collaborations can be with, for example, local associations, activities, food producers and cultural workers and enable the development of new local initiatives to meet the needs of visiting teleworkers who want to experience the daily life in the city they visit. Creating coliving environments and local service partnerships is a perfect opportunity to cater to these new groups, and partnerships with associations such as the Wifi Tribe can hugely benefit a particular coworking space looking to attract nomadic residents.

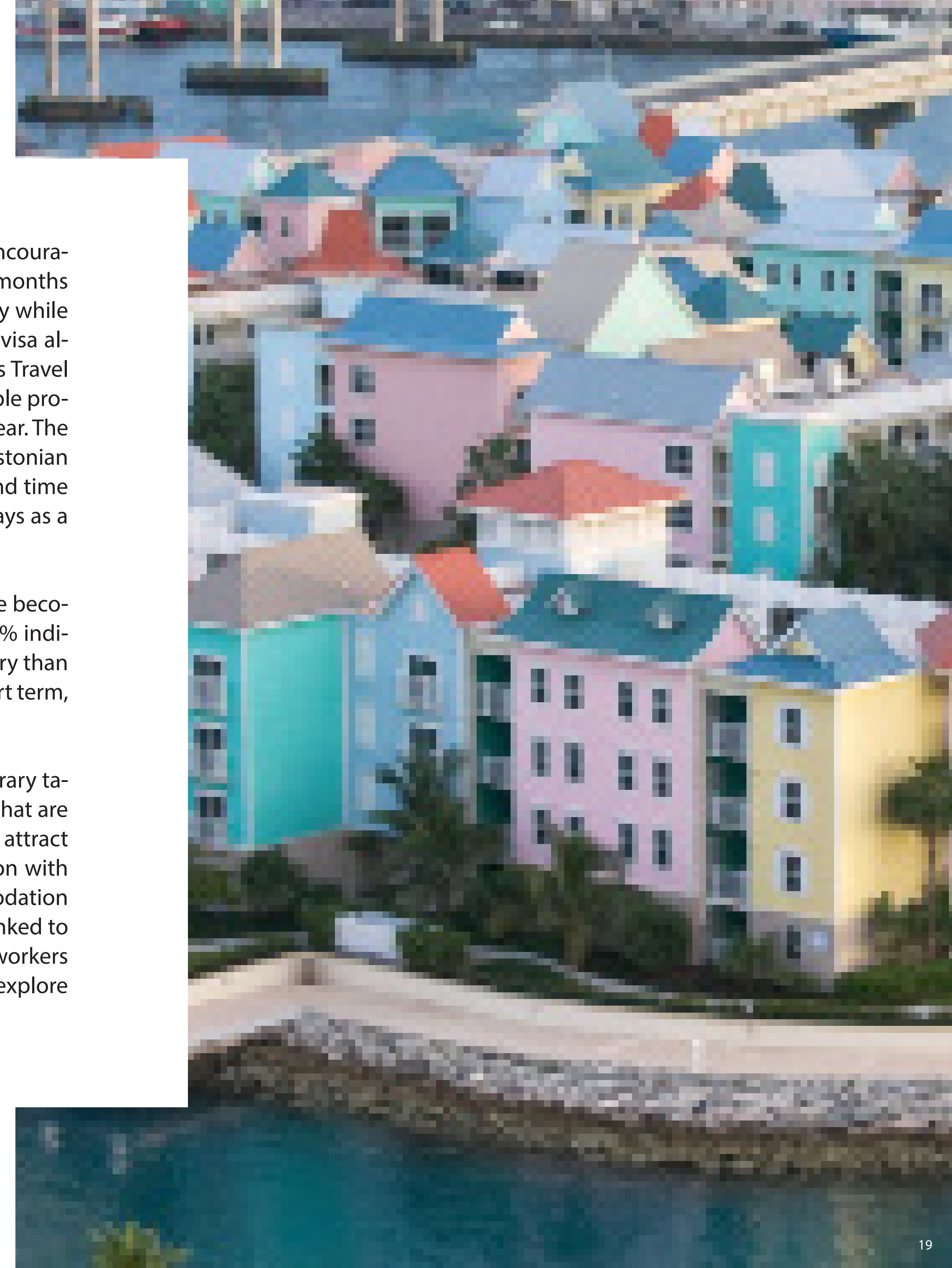
VISA UPDATES

WHAT: The fact that a large proportion of knowledge workers during the corona pandemic worked remotely has encouraged certain countries to adapt visa requirements for long stay visitors wishing to work from the country for a few months or up to a year. The Bahamas is ideally suited to accommodate “long term” visitors who wish to work or study remotely while simultaneously enjoying and exploring a new destination and culture. The country has created an easy-to-apply-for visa allowing workers or students to live and work remotely from the island for up to a year. The “Bahamas Extended Access Travel Stay” program also recommends living areas to participants, according to their budget. Estonia has also created a simple process for applying for and obtaining visas for teleworkers outside the EU who want to live in the country for up to one year. The requirement is that the employee is officially employed by a company outside Estonia, or works mainly with non-Estonian customers. Iceland have also recently established a visa track for remote workers and their families to be able to spend time in the country, whilst still working for a foreign company. The aim is for people to experience Iceland for up to 180 days as a remote working tourist.

Workcations - where people add a few extra weeks to their holidays in which they work from the holiday location - are becoming increasingly popular, especially following the pandemic. Of 7000 respondents from across the world, nearly 80% indicated they would add a few weeks of workcation to the end of their holidays. This demographic can be more temporary than Nomads, or new residents to an area, but they would equally be looking for opportunities to live somewhere in the short term, and not necessarily in a hotel.

SO WHAT: Many countries and cities have begun to see teleworking as an opportunity to take advantage of temporary talent influx that can also spill over into local development, by letting teleworkers take part in the local lifestyle. Places that are considered primarily lifestyle-related tourist destinations are now being changed to destinations for longer stays to attract mainly qualified officials and knowledge workers. Longstay concepts would be particularly beneficial in collaboration with programs such as these - the BEATS program has partnered with different hotels and resorts to offer long stay accommodation at a reduced price to programme participants. They can also create financial benefits through new service offerings linked to that particular target group. On a larger scale, entire countries can attract talent and develop better conditions for teleworkers who want to live there for a limited period through strategic positions and by creating incentives for local actors to explore ways to make longer stays possible.

<https://www.forbes.com/sites/kaeliconforti/2020/12/19/how-to-work-remotely-in-the-bahamas-for-up-to-a-year/>
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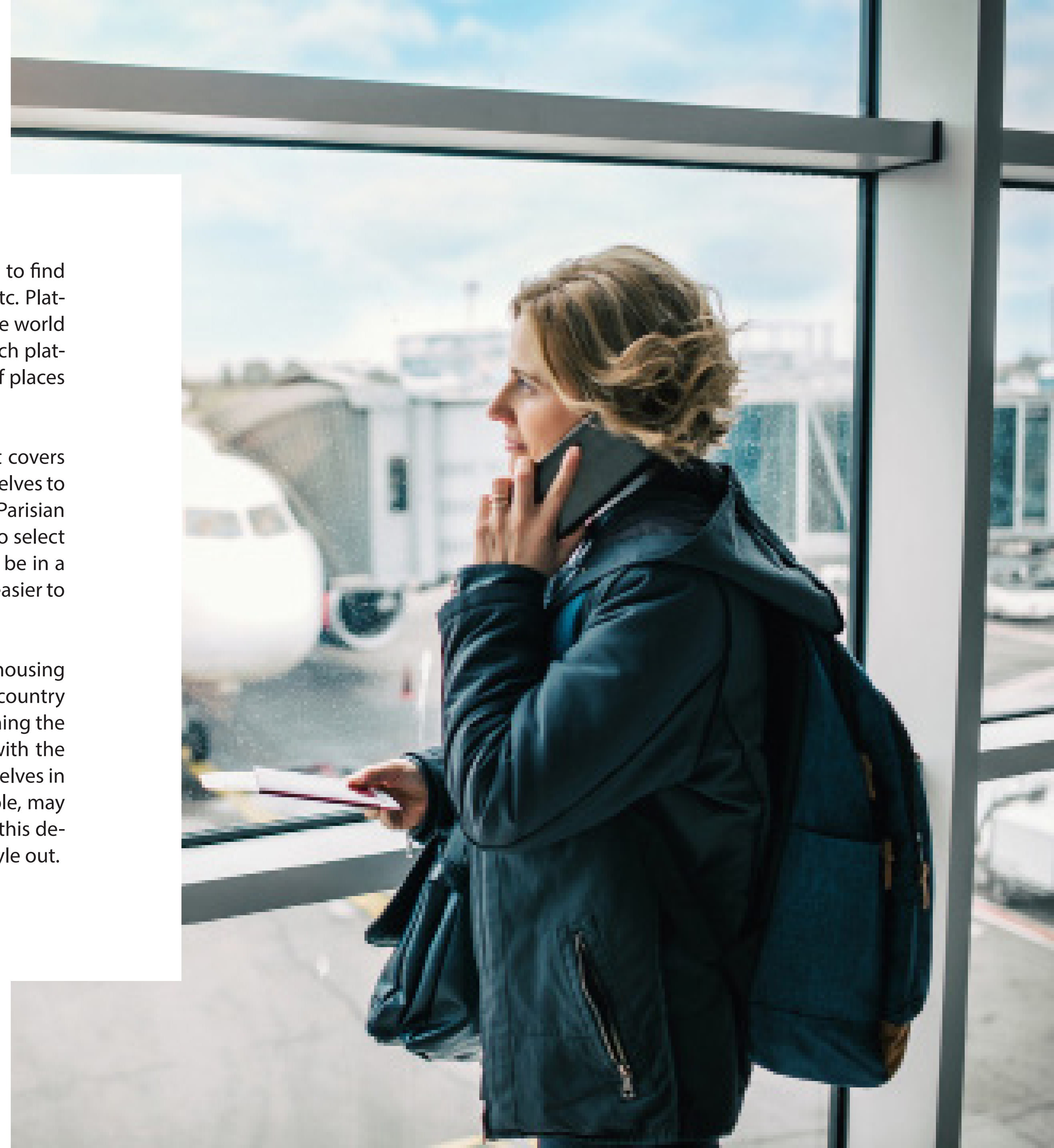


NEW ARRIVALS

WHAT: People have realised that when moving to a new country, it can be incredibly difficult to find housing initially, while you wait for social security paperwork, understand how rental works, etc. Platforms have emerged for those looking to do just this, such as NomadList.com, where cities in the world are ranked according to how good they are for digital nomads. Svenska Nomader is another such platform, where digital nomads from Sweden can ask each other for advice, but also can find lists of places around the world where they can easily live and work.

Whilst all coliving spaces are built around some form of package offering (one rental payment covers many different services and amenities - a “plug and play” concept), some spaces have built themselves to meet the needs of people who have recently arrived in a completely new country. Flatmates is a Parisian startup which focuses on providing housing opportunities for new arrivals. They allow people to select preferences, and aim to group people in their housing based on this - e.g. if they would rather be in a single-sex space, or what their hobbies are. They offer affordable coliving premises, quicker and easier to access than a rental in the city.

SO WHAT: In countries or regions where people move for lifestyle reasons in particular, finding housing before having a job can be incredibly difficult. The same applies to remote workers arriving in a country just for the experience, but working from elsewhere. Establishing yourself can take a while, opening the market to housing associations offering fuss-free, fully furnished accommodation, especially with the inclusion of community-building so that new arrivals can share experiences and establish themselves in an area, beginning to network or make friends. People wanting to move to Sweden, for example, may struggle to find a place to rent before they have a personnummer. A coliving space catering to this demographic would certainly attract nomads, and encourage hesitant new arrivals to try the lifestyle out.



WHAT RESIDENTS WANT

WHAT: IKEA's Space10 "one shared house" research project examined what residents would want from a sustainable shared house of the future. They surveyed more than 14,000 people in 147 countries, and learned the following:

People do not want to share bathrooms or bedrooms (3% and 0% of those surveyed would approve of sharing these, respectively), but are happy sharing kitchens, workspaces, gardens, and the internet. 67% would like clear boundaries between communal and private spaces.

They would prefer to live with single women and childless couples, without having to worry about dealing with young children and teenagers. Privacy is the biggest concern for those under 65, those over 65 seek to avoid conflict and mess. 47% of people wanted to live in spaces with 4-10 co-residents. Large city coliving spaces, such as WeWork, Colive or apart-hotels can be just as isolating as living alone, unless social life is appropriately catered for. The desire for co-sharing stems mainly from the desire to be social (39% of those surveyed see this as the greatest benefit, followed by 20% seeing cost-saving as the benefit).

Further findings also suggested that people wanted to live with diverse groups, to extend their knowledge horizons beyond the bubbles they find themselves in with work or hobbies. 70% would pay extra for a service layer to manage all household items. Residents in this kind of long-term shared housing would want furnished common spaces, with the opportunity to furnish their rooms themselves. 70% of those surveyed responded that they would want to be nomadic if the community had spaces around the world.

SO WHAT: Most coliving companies cater for large numbers of residents, sometimes upwards of 500. Residents are often of a similar background to be able to live in these spaces, and private rooms are often furnished. This IKEA survey shows that it is important to ask potential residents what is important to them, to be able to develop the best coliving spaces for a particular target demographic. Nomads, for example, may prefer a furnished room. However, those looking to live in a community for the longer-term may not. Similarly, community size and conflict resolution is important to consider - building a space for a particular demographic requires knowing their needs and desires, to ensure they will be attracted by the offering: if people moving to a new area want a community-feeling, the number of residents should not be too high.



FORGOTTEN DEMOGRAPHICS

WHAT: Coliving opportunities are quite diverse in their offerings, but are mainly accessible to individuals within a certain age and socioeconomic profile - it has often been associated with millennial freelancers and digital nomads in particular, which leaves room on the market for the development of spaces catering to new demographics.

The above report mainly discusses the main targeted demographics within coliving space development: usually young professionals, living alone or as a couple. But there is interest in coliving from many different demographics - a 2021 article on future trends discusses the underserved groups interested in coliving: baby boomers, monoparental families, multigenerational, low-income earners, startup accelerator programs and company employees.

The Amsterdam coliving meetup: "Coliving in 2030" also discussed how new living models need to develop to address the desires of groups equally affected by the loneliness epidemic and problems of affordability, but underserved by coliving. Hybridisation (gathering coliving residents across different age groups) should be more widespread, shaping communities only around interests and common needs, rather than age limits.

SO WHAT: There is a large market potential for serving new targeted communities. They may have different needs in terms of spatial design and added services, but a simple change of demographic focus could have a large payoff, and is being discussed as the coliving trends of the future. Understanding the unmet needs of people interested in coming to, or living in, a particular town or region can allow new coliving developments to capitalise on these and increase their chances of success.



NEW DEVELOPMENT PATTERNS

As mentioned throughout this report, coliving is often combined with an interest in living more sustainably, as well as community building. Coliving communities and company owners have invested in technologies which allow easier scale-up of spaces, and focus on how to flexibly design spaces to optimise community-building, and repurpose spaces to match the needs of current residents. The use of proptech and design solutions are also integral to reducing CO2 emissions, encouraging sustainable behaviours (e.g. recycling, or food-sharing to avoid waste). Sustainable living is integral to the future development of coliving spaces.

PROPTech

WHAT: Proptech (a mix of “property” and “technology”) is an innovative approach to real estate technology, allowing landlords/owners to manage a property more easily from a distance. The technology has been argued as a “must-have” within coliving space management, and investment in Proptech companies has recently started increasing again. Venture capitalists and other investors poured \$9.5 billion into proptech through mid-November 2021 - This is the most ever raised, beating the previous record of \$9 billion invested in the sector for all of 2019.

The use of Proptech enables the creation of better relationships between residents, as well as between the owners and the residents. It is used to optimise access to rooms, logistics and communication, however can also be used for continued research and optimisation of the coworking spaces. Companies such as Zoku and The Student Hotel are investing in sensors to understand how spaces can better be used, e.g. what the ratio of private/public spaces should be. Tech can also be used to ease booking, property access management, event planning, camera surveillance and community building.

SO WHAT: Increased talk about the use of proptech amongst coliving owners, and increased investment in Proptech suggests that commercial coliving spaces will continue to grow. The 2021 Amsterdam Coliving Meetup highlighted this as one of the key factors spaces should invest on to create the coliving space of 2030. The continued development of proptech is also making the creation and management of coliving spaces easier, potentially contributing to a continued increase in the number of emerging coliving spaces. The coliving space Common is also developing their own proprietary proptech - further highlighting that this technology is closely tied to the future of coliving.

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INTERIOR DESIGN

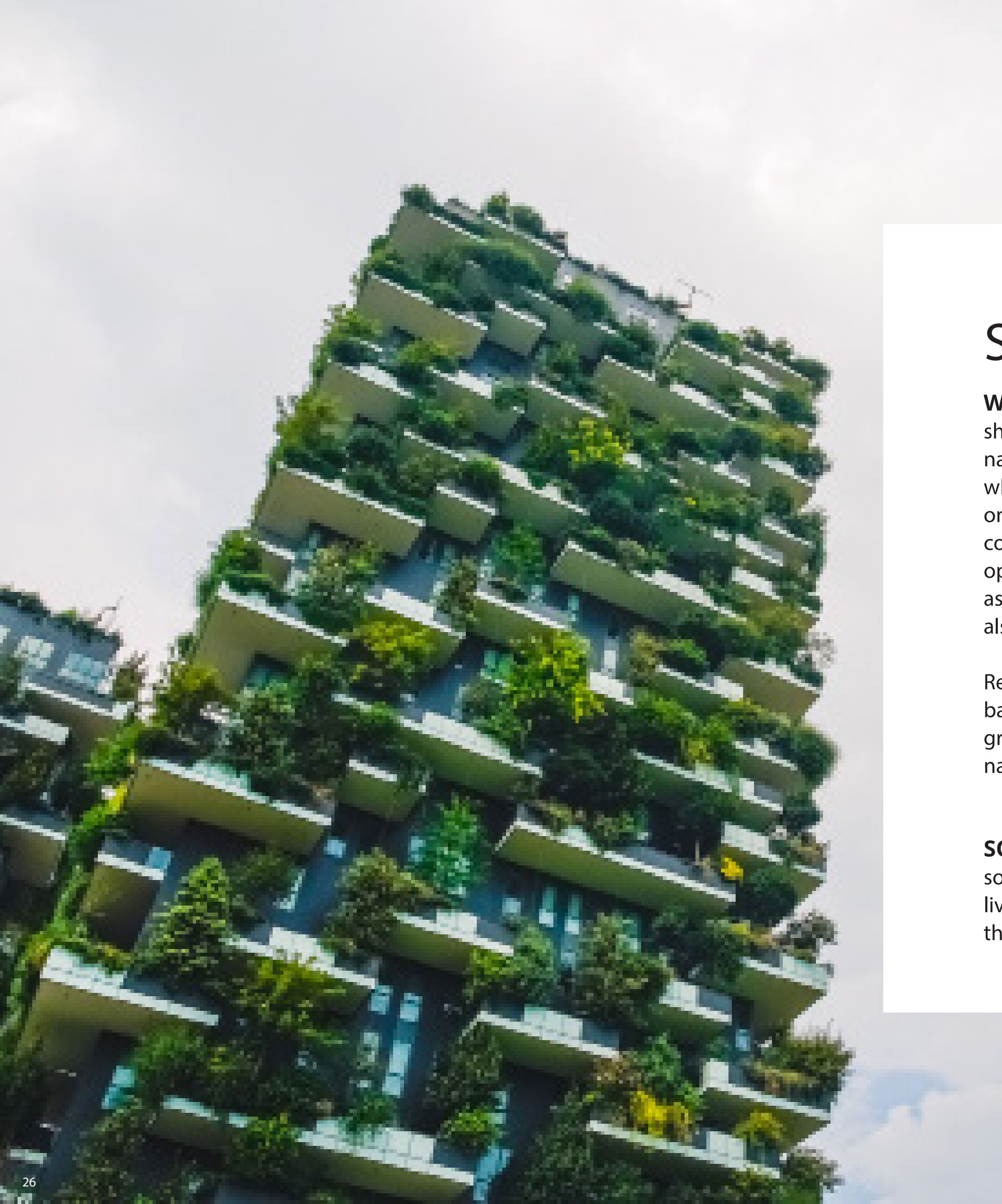
WHAT: When starting the development of a coliving space, interior design is an extremely important element to consider in order to encourage community-building. Respondents to IKEA's Space 10 research into the shared housing of the future, indicated that they thought designers would be best suited to create a shared housing space. The design of a space will have to match its purpose, and easily indicate which areas are common vs. private, as well as encourage organic social interaction between residents. The design of a coworking space is also integral to its sustainability - flexible, modular and retractable solutions have been discussed as most advantageous to allow optimal space-usage, as well as to allow onsite production of spaces if coliving plans are spread across the world. Flexible and reconfigurable spaces will also adapt better as coliving evolves in the future, with less material wastage.

Research into current urban coliving spaces has found that "design for diverse use, creation of opportunity for informal meetings, and integration of environmental heritage" were critical elements of shared living design and that this ultimately "increases interpersonal bonds and individual and collective well-being". The presence of different rooms or furniture can have a great impact on the success of a space.

A study conducted by KTH followed tenants in a "live lab" coliving space found that predetermined rules create structure and order and were very much appreciated by the residents. Although these were adjusted based on what the tenants jointly felt they needed, the foundation was still something that everyone considered necessary and they were perceived as more satisfied with the situation.

SO WHAT: Coliving spaces are evolving, and being designed to be future-proof, sustainable and community-building. Similar research is going into coliving spaces as into coworking spaces - and now the two may also combine: the idea of interaction among different people, creativity and inspiration are all being encouraged by the existence of these spaces. Discussing design and whether a space should be designed for residents, by residents, or a combination, is a hot topic at the moment, and should be taken into consideration when establishing any new coliving space.





SUSTAINABILITY

WHAT: The modern coliving movement has emerged in strong combination with a desire to shift to more sustainable living. Most coliving spaces have a specific focus on increasing sustainability in their offering, since investors and tenants are not interested in offering without this: whether that be through electricity provided by solar panels, shared meals, car-sharing, offering only locally-sourced foods or even having their own allotments - the need to live sustainably is accounted for. Coliving has also emerged from the rising interest in the sharing economy - ensuring optimal use of resources and spaces - which lends itself to environmentally-friendly living, as well as making sustainable economic choices, both of which coliving caters to. Most coliving spaces also have a sustainability manager.

Research into coliving in Stockholm has also suggested that coliving affects sustainability in urban environments by encouraging reduced consumption through sharing and access to a social group - this social group provides a sense of belonging and indicators of how to behave - (sustainable behaviours are more likely to be maintained if instigated and upheld within a group).

SO WHAT: With rising house prices and climate concern, coliving lends itself to be the logical solution for those looking to live affordably and sustainably, especially in more urban areas. Coliving and cohousing are being argued as a step towards post-carbon cities, more evidence that they are here to stay.

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