

Bidwells 2025 Co-living survey

What?

A survey to inform the industry and uncover emerging trends and preferences for co-living in the UK in 2025.

Who?

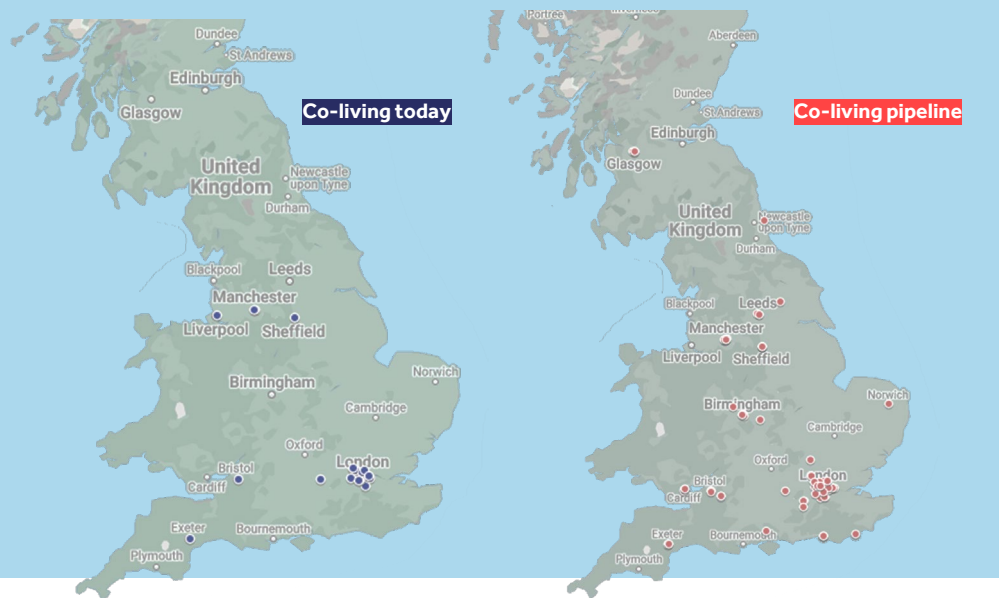
We asked over 2,000 people living in London and the 'big six' cities: Birmingham, Bristol, Edinburgh, Glasgow, Leeds, Manchester.

When?

The data was collected between 28th April and 6th May 2025.

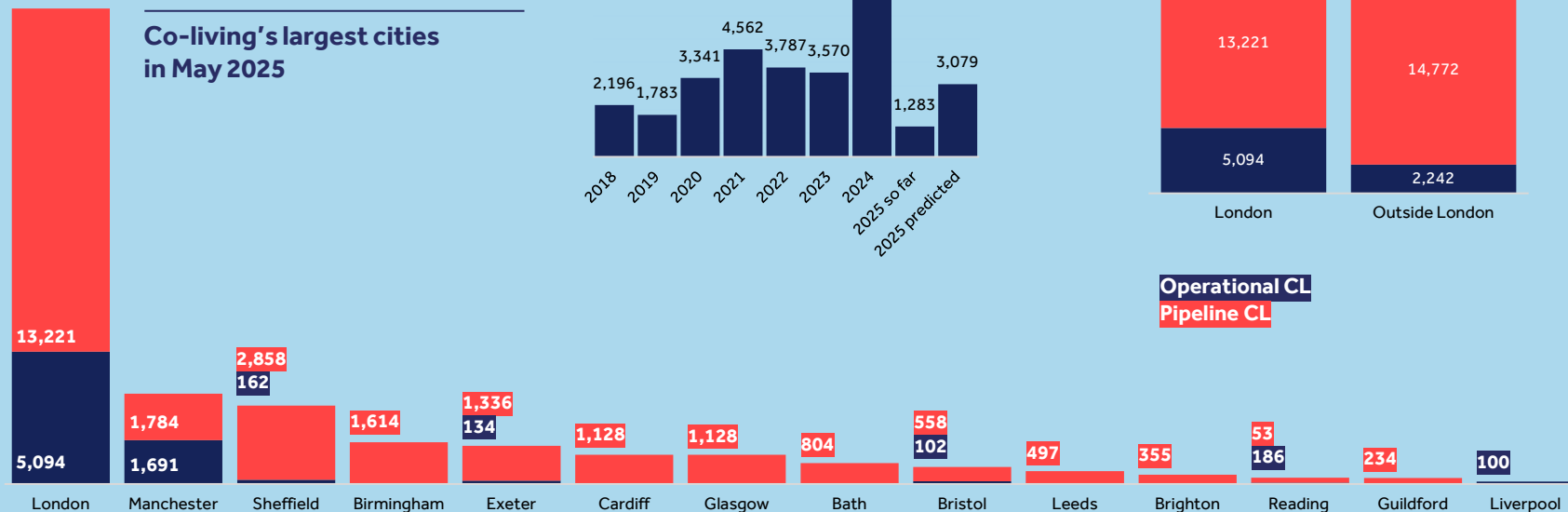
Why?

Co-living is in the same embryonic stage that MF-BTR was 10-15 years ago (see maps below). It's a rapidly-growing BTR sector, with £1bn invested since 2020, but data and information remains very limited – especially regards consumer sentiment.

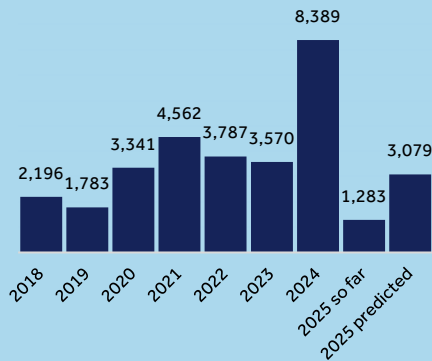


Bidwells 2025 Co-living survey

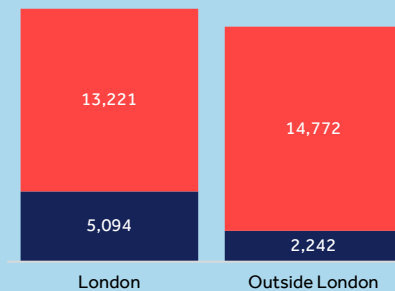
Co-living's largest cities
in May 2025



New co-living planning applications
peak in 2024



Remains London-centric, but
rapidly changing



Operational CL
Pipeline CL

Summary of key trends

Preference for personal space

- Respondents of all age groups across all cities preferred own space/own en-suite.
- Studio vs cluster-based co-living?

A growing trend towards urban living

- Respondents of all age groups across all cities tender to prefer city living
- Short commutes, proximity to local amenities and social networks all supported.
- Respondents even said they'd trade square footage for being in city centres and closer to friends/social networks

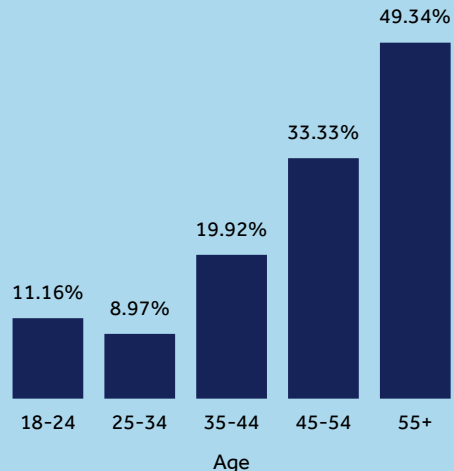
Importance of community

- The survey revealed a strong desire for social connectivity where we live, particularly among younger groups.
- We know that people stay longer and are willing to pay more to live in communities where they have friends.

Tangible vs intangible amenities

- There's a preference for 'intangible amenities' like Wi-fi and security over co-working space, parking, or gyms.

"I don't live in co-living, and I wouldn't consider it"



Why would you not consider living in a co-living community?

Overall

- 1) Prefer my own space **(59.8%)**
- 2) Uncomfortable sharing amenities **(52.4%)**
- 3) Noise or disturbances **(40.97%)**

People aged 18-24

- 1) Concerns about cleanliness **(28.8%)**
- 2) Prefer my own space **(28.52%)**
- 3) Noise or disturbances **(28.24%)**

People aged 25-34

- 1) Uncomfortable sharing amenities **(66.67%)**
- 2) Prefer my own space **(59.72%)**
- 3) Concerns about cleanliness **(41.67%)**

People aged 35-44

- 1) Prefer my own space **(54.64%)**
- 2) Uncomfortable sharing amenities **(52.58%)**
- 3) Not suitable for families/children **(47.42%)**

People aged 45-54

- 1) Prefer my own space **(65.52%)**
- 2) Uncomfortable sharing amenities **(50.57%)**
- 3) Security concerns **(44.83%)**

People aged 55+

- 1) Prefer my own space **(66.96%)**
- 2) Don't like communal living **(50.89%)**
- 3) Uncomfortable sharing amenities **(50.78%)**

Statement 1

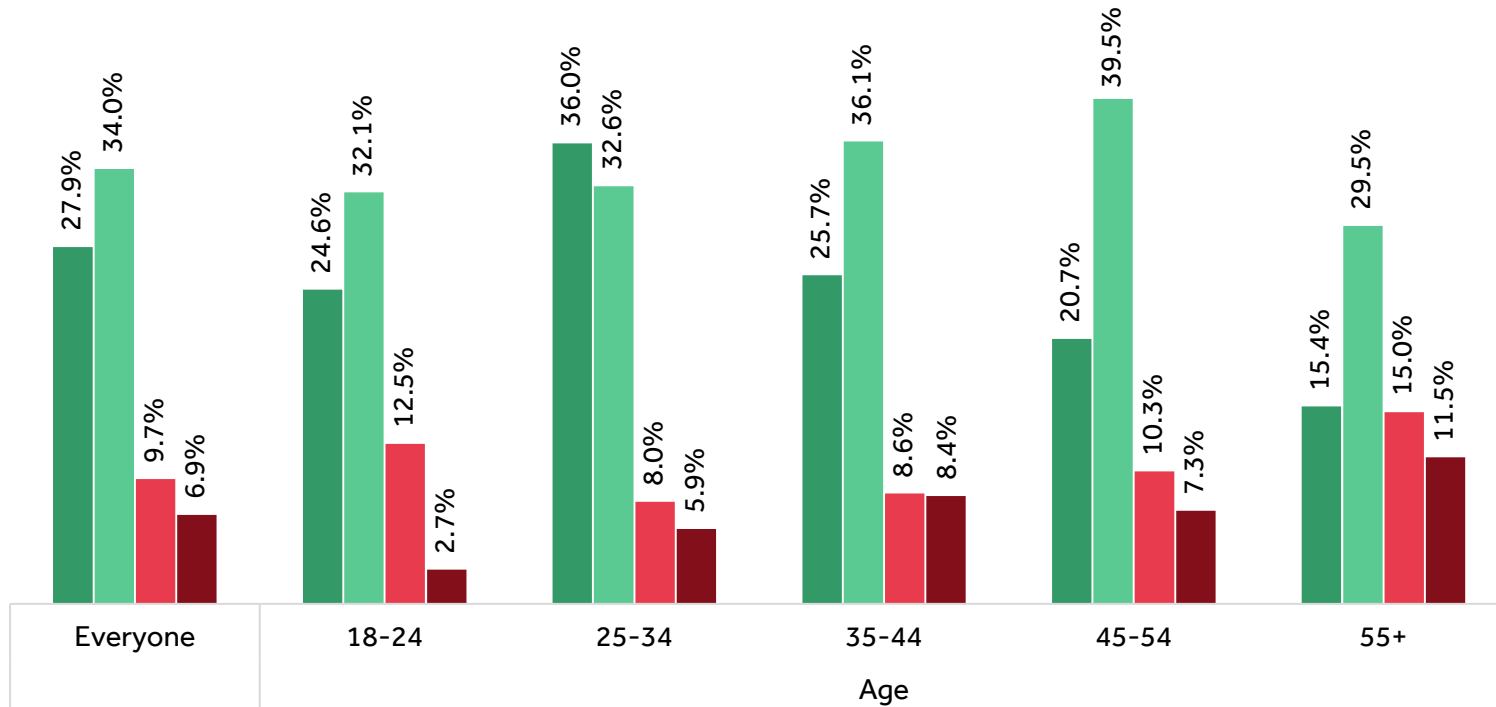
"I'd rather have a shorter commute and less living space than a larger home far from work or city life for the same rent cost"

Strongly agree

Somewhat agree

Somewhat disagree

Strongly disagree



Statement 1

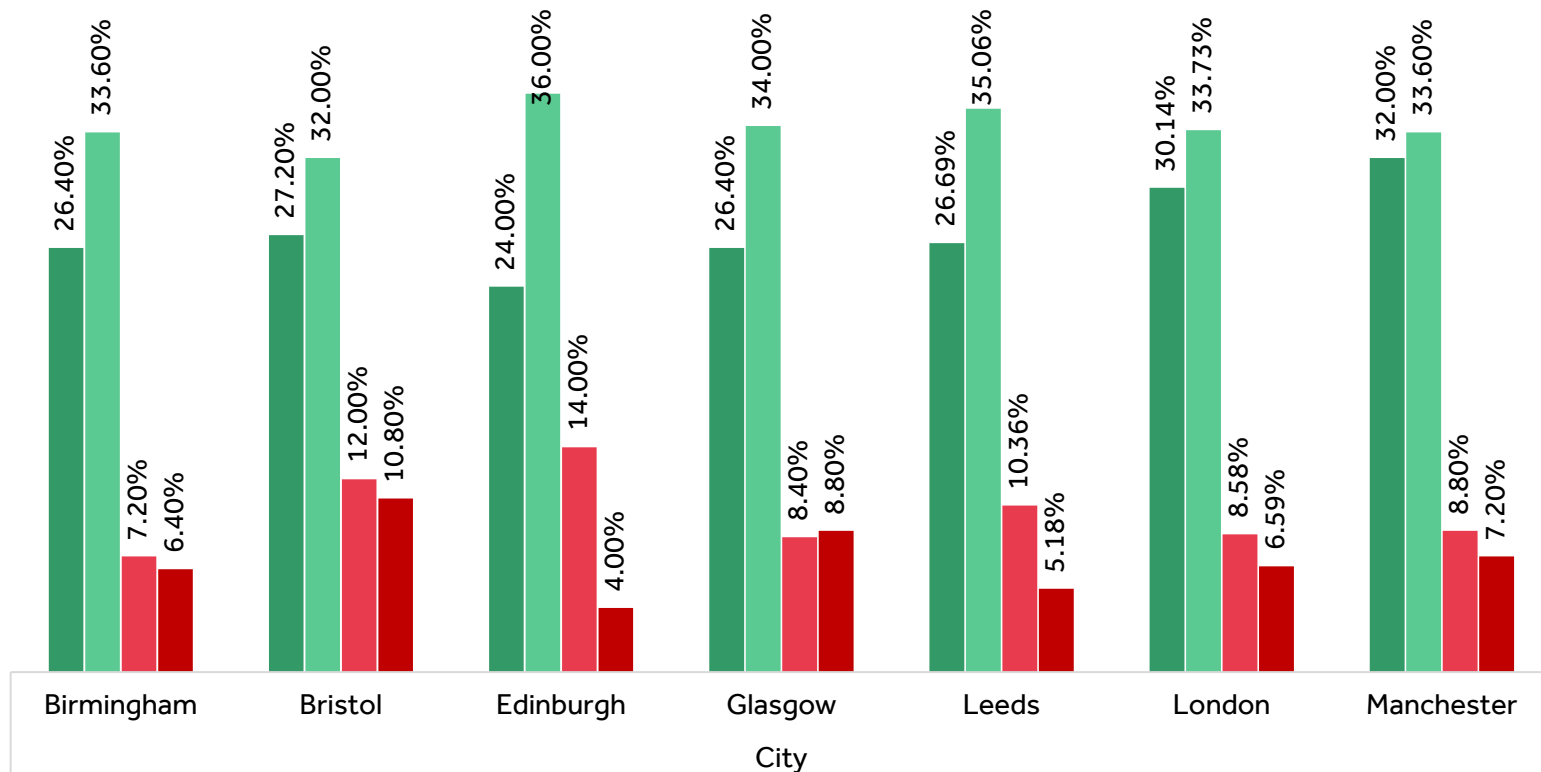
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Somewhat agree

Somewhat disagree

Strongly disagree



Statement 2

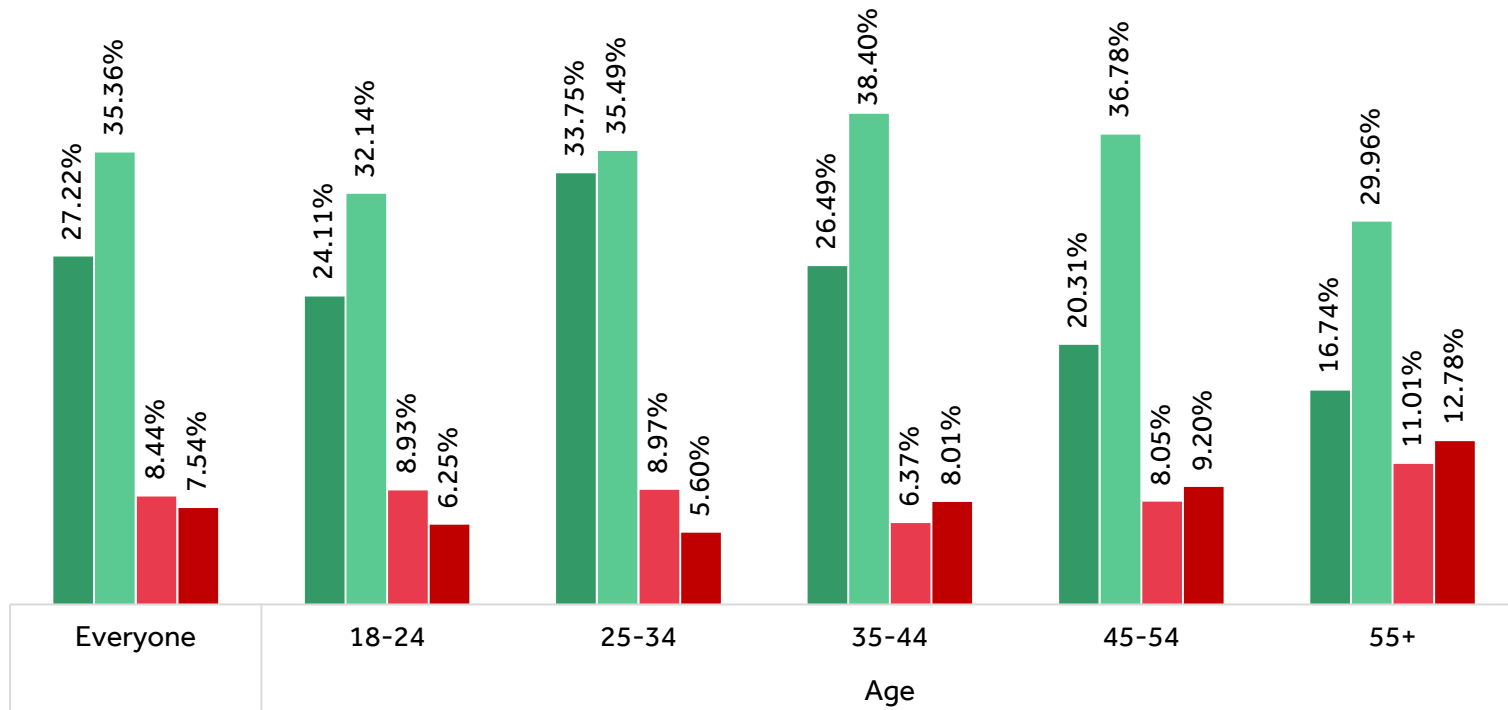
"I'm happy to live in a smaller home for the same cost as a larger home if it means I can be closer to city centre amenities and opportunities for socialising"

Strongly agree

Somewhat agree

Somewhat disagree

Strongly disagree



Statement 2

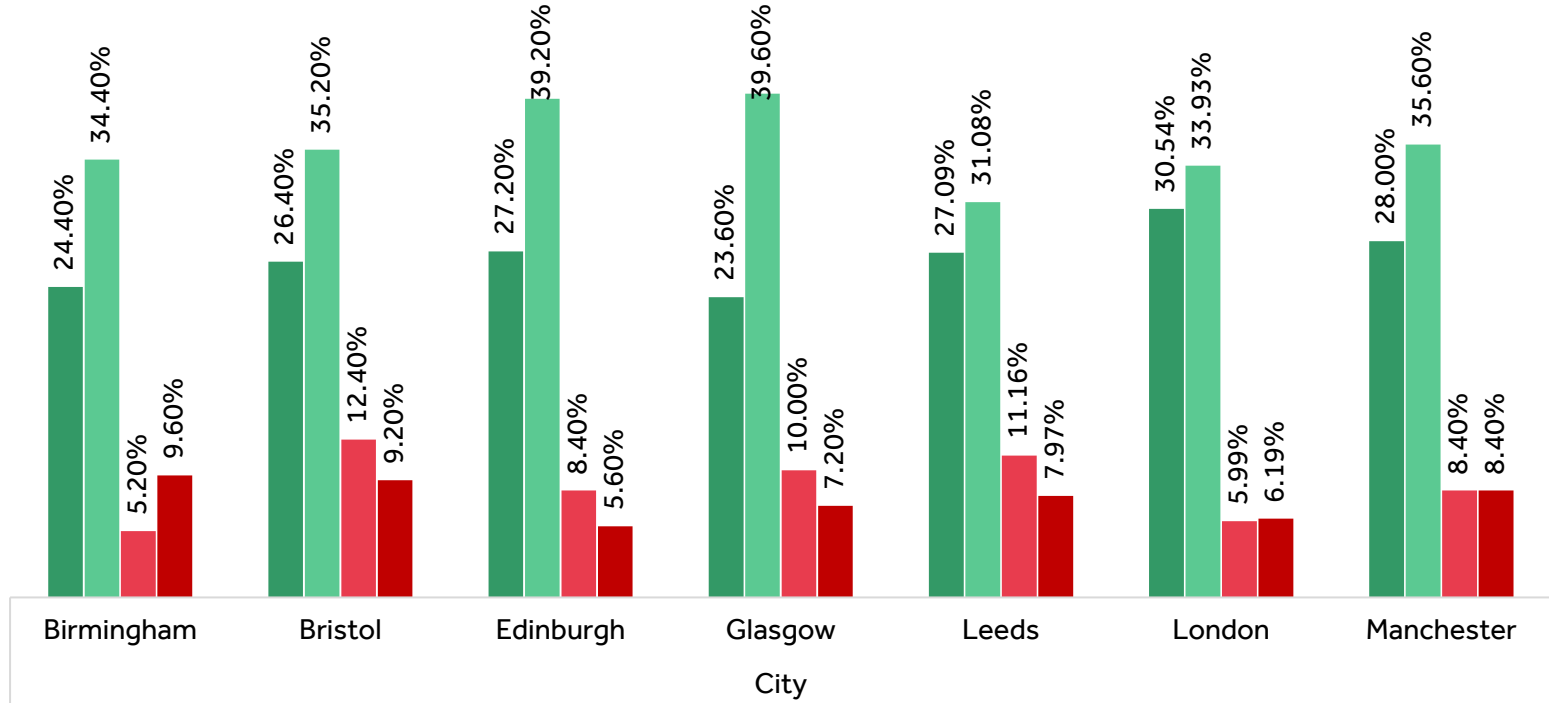
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Statement 3

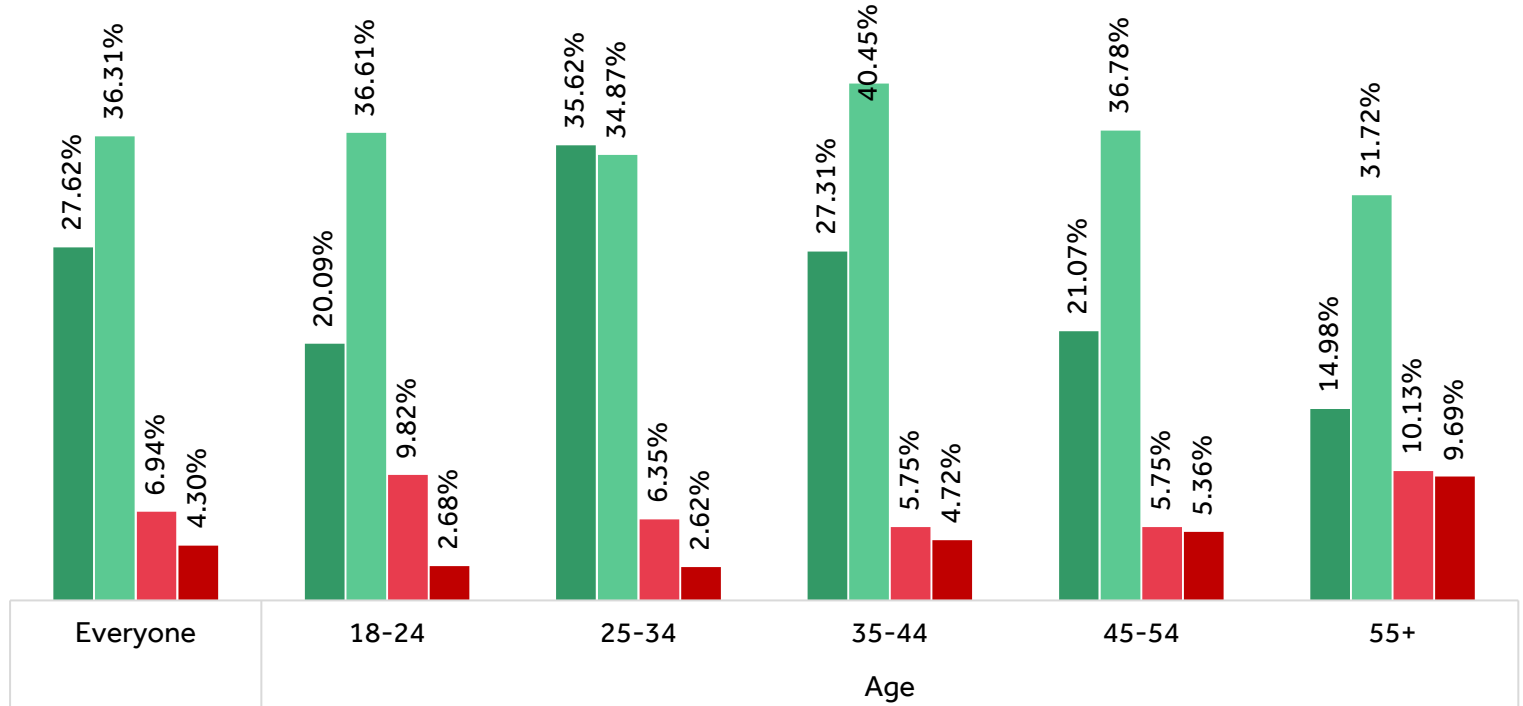
"I'd trade square footage for being in a walkable area with good amenities"

Strongly agree

Somewhat agree

Somewhat disagree

Strongly disagree



Statement 3

"I'd trade square footage for being in a walkable area with good amenities"

Strongly agree

Somewhat agree

Somewhat disagree

Strongly disagree



Statement 4

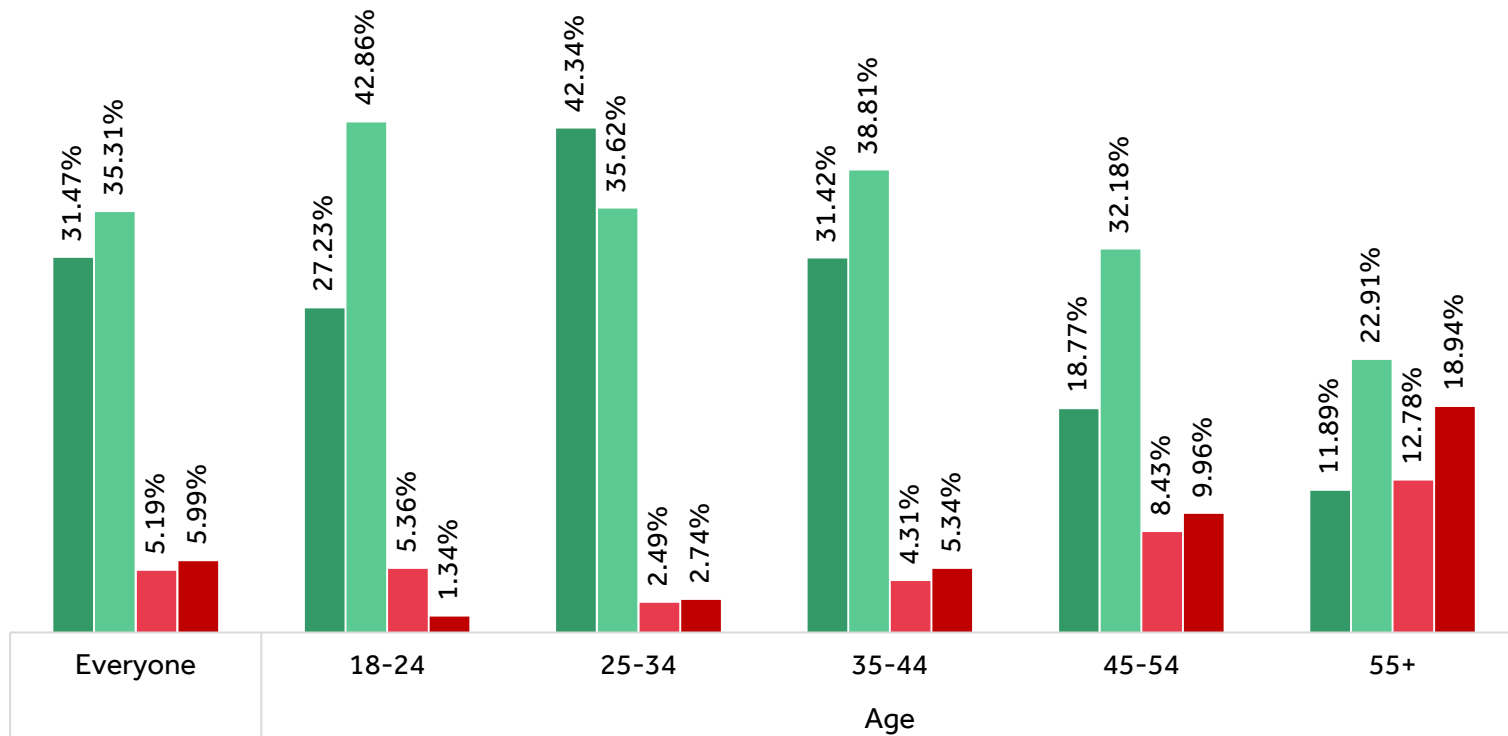
"I enjoy the idea of having built-in community and social opportunities where I live"

Strongly agree

Somewhat agree

Somewhat disagree

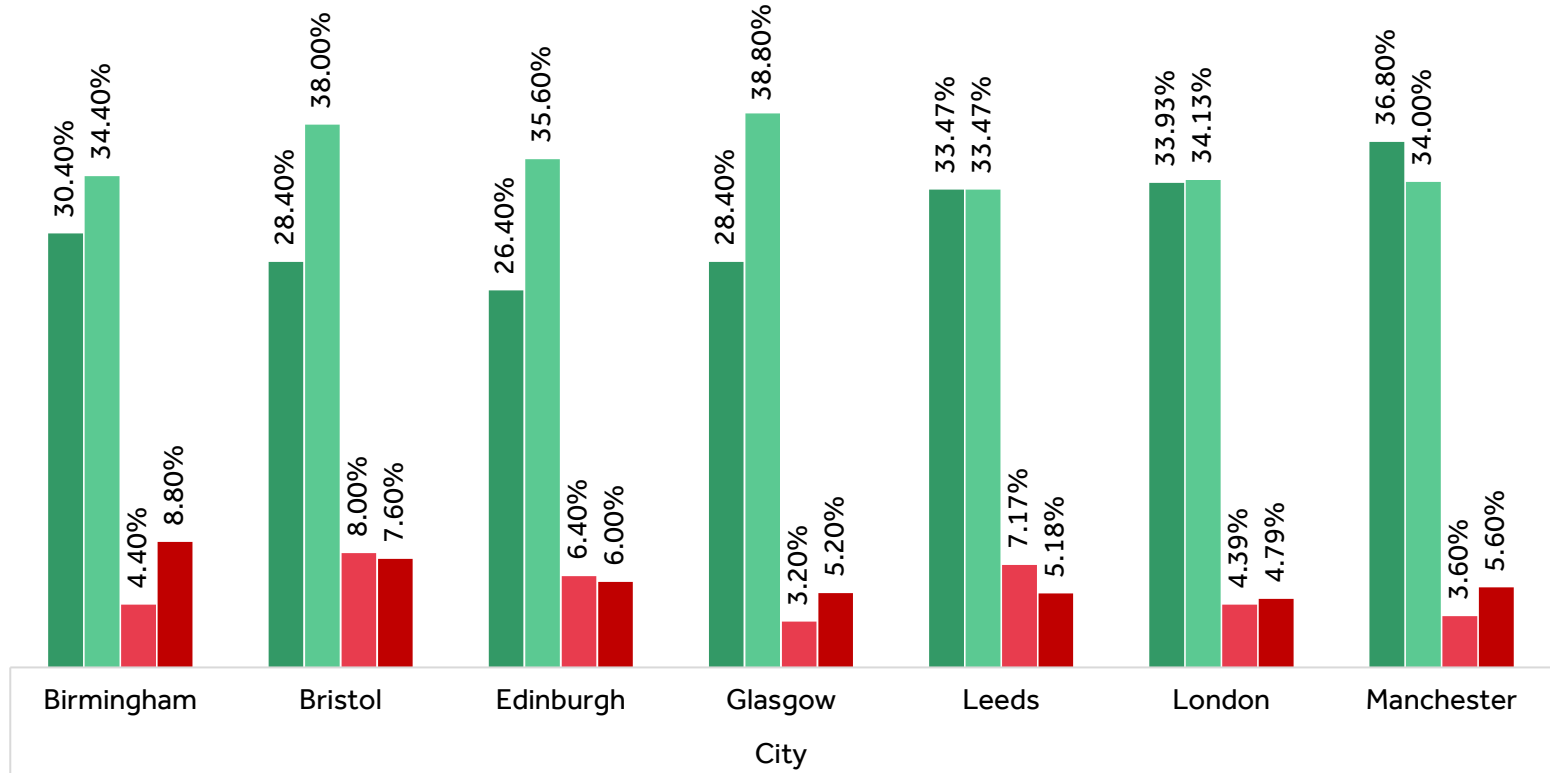
Strongly disagree



Statement 4

"I enjoy the idea of having built-in community and social opportunities where I live"

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree



Statement 5

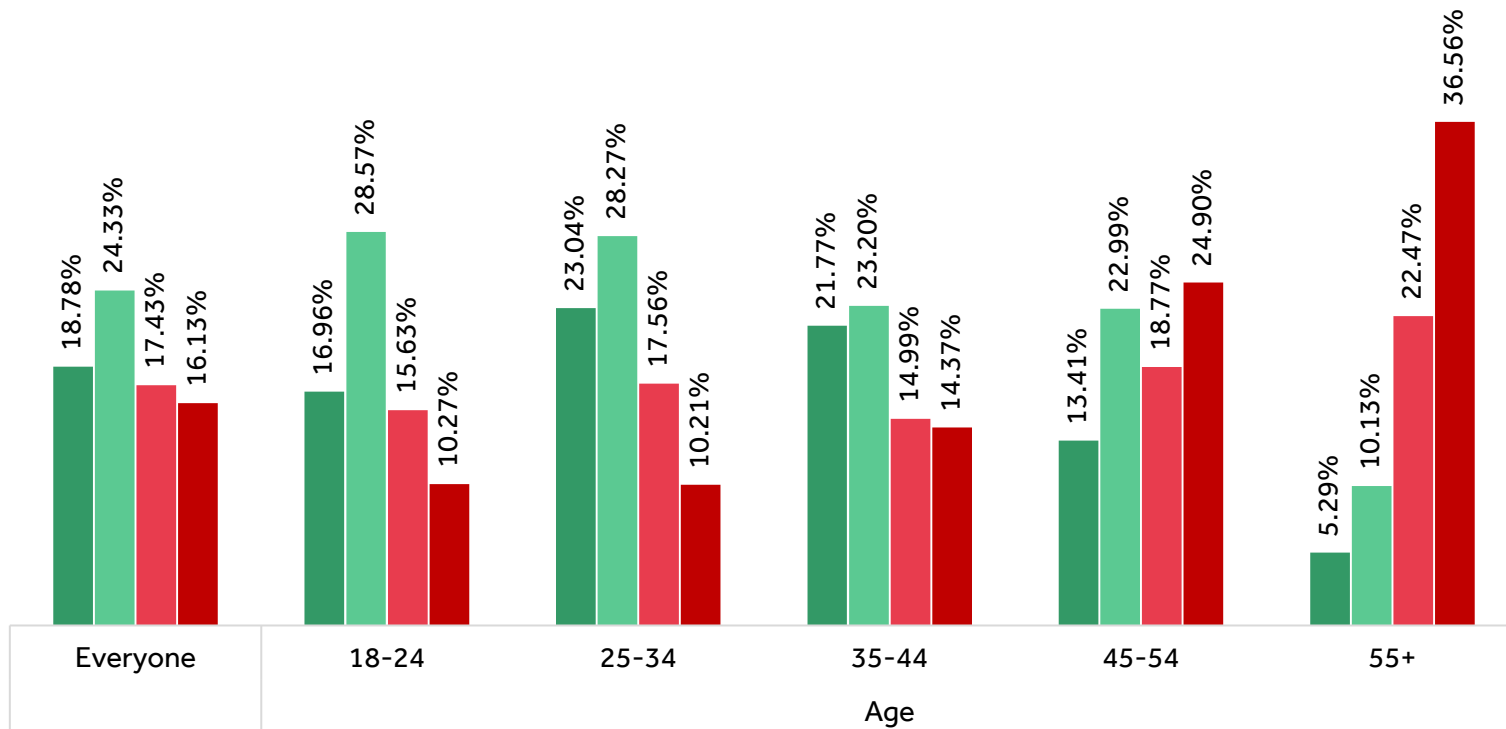
"Having shared amenities (e.g. co-working, gym, lounge) is more important to me than having extra space in my own home"

Strongly agree

Somewhat agree

Somewhat disagree

Strongly disagree



Statement 5

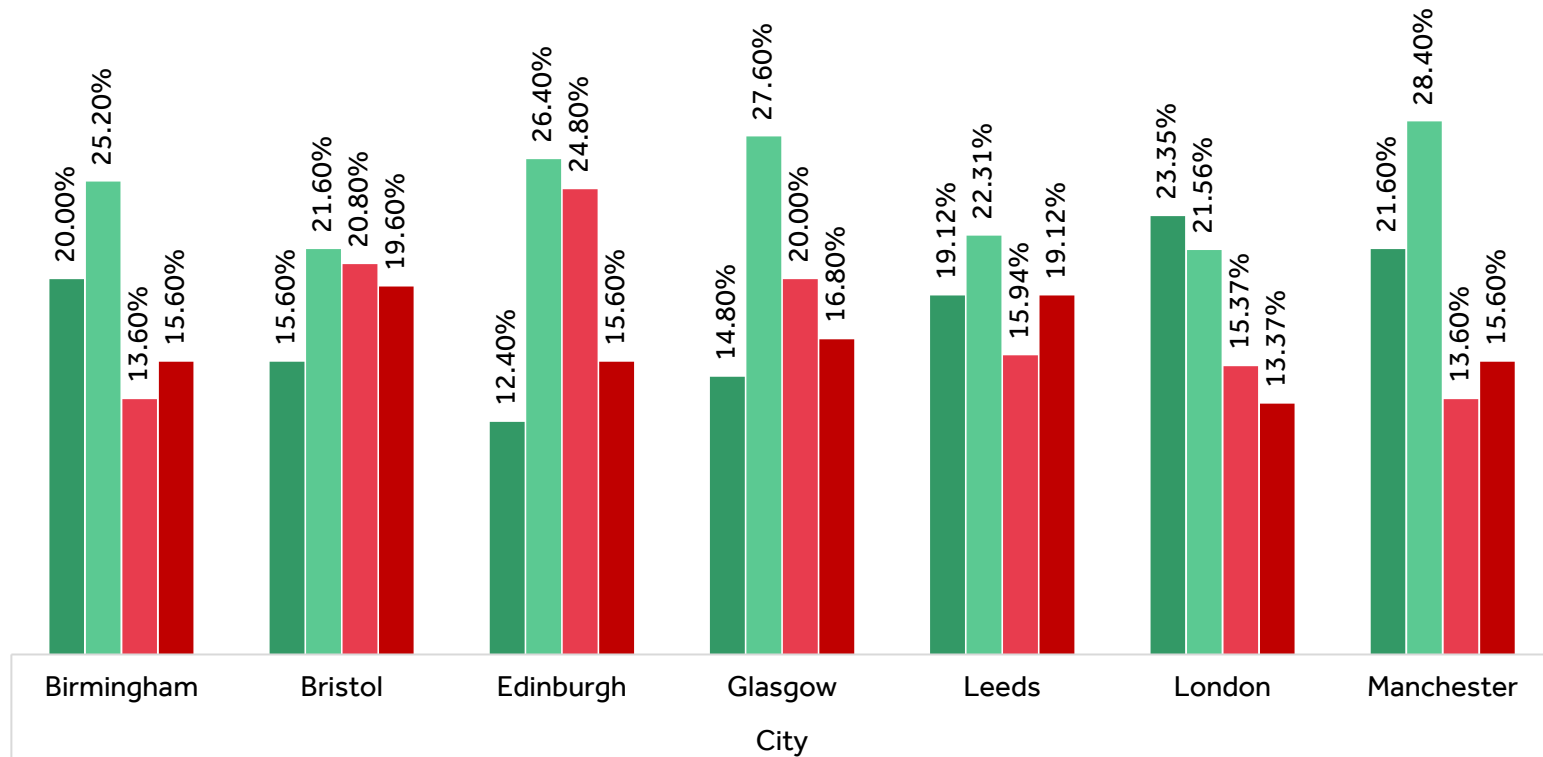
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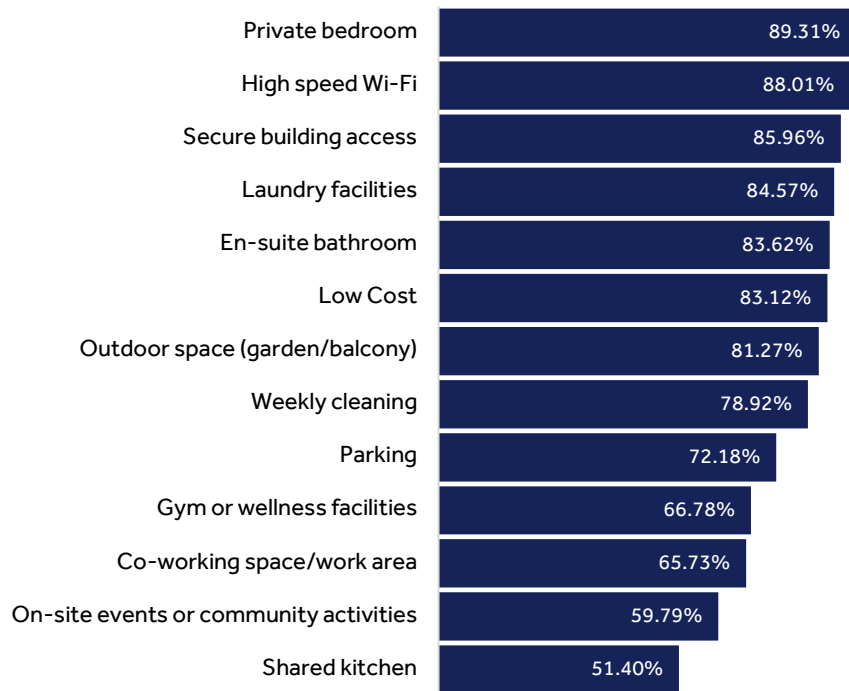
Somewhat agree

Somewhat disagree

Strongly disagree



Which of the following features would be essential for you in a co-living community?



Birmingham

- 1) High Speed Wi-fi **(84.4%)**
- 2) Private bedroom **(83.6%)**
- 3) Low Cost **(82.4%)**

London

- 1) High Speed Wi-fi **(86.6%)**
- 2) Private bedroom **(86.4%)**
- 3) Secure building access **(85.0%)**

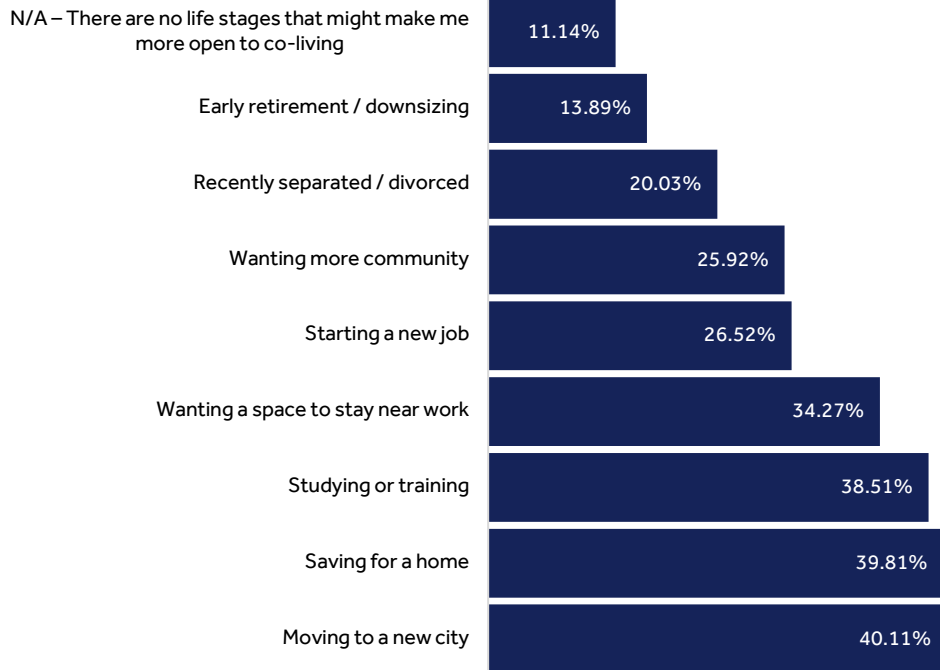
Manchester

- 1) Private bedroom **(91.6%)**
- 2) High speed wi-fi **(91.2%)**
- 3) Secure building access **(85.0%)**

Of all co-living residents

- 1) High speed wi-fi **(88.00%)**
- 2) Private bedroom **(87.00%)**
- 3) Laundry facilities **(85.57%)**

Which life stages, if any, might make you more open to co-living?



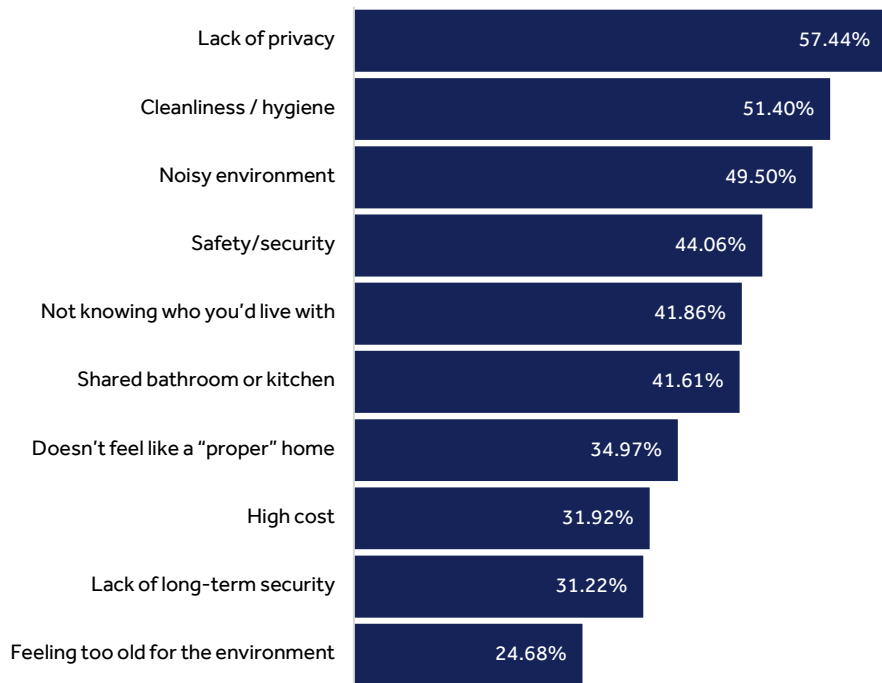
18 to 54 YOs

- 1) Moving to a new city
- 2) Studying or training
- 3) Saving for a home

Over 55s

- 1) Nothing **(32.16%)**
- 2) Moving to a new city **(25.11%)**
- 3) Recently separated/divorced **(22.47%)**

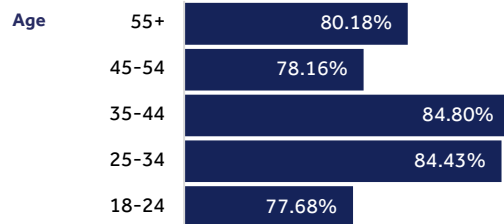
What concerns, if any, might put you off considering co-living?



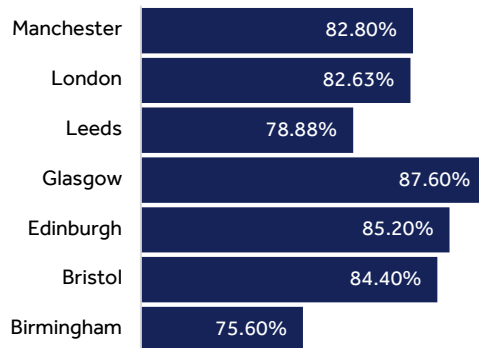
How important is proximity to the following when choosing where to live?



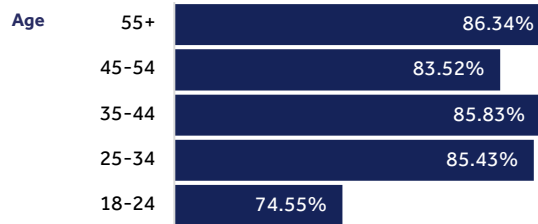
Public transport (82.5%)



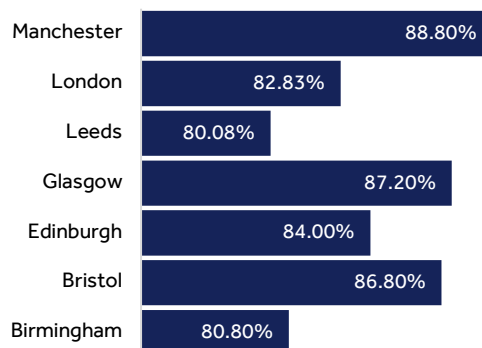
City



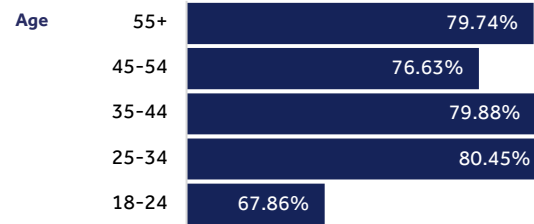
Shops and restaurants (84.2%)



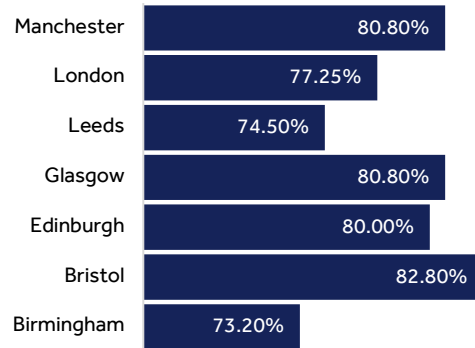
City



Parks or green space (78.3%)



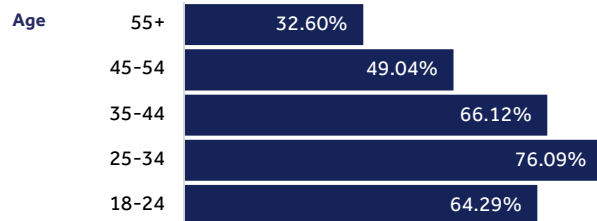
City



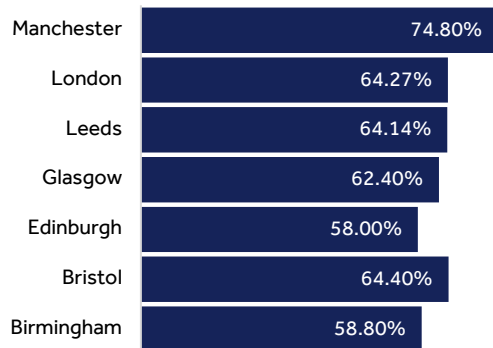
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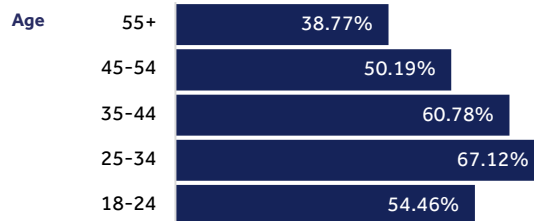
Gyms/wellness facilities (63.9%)



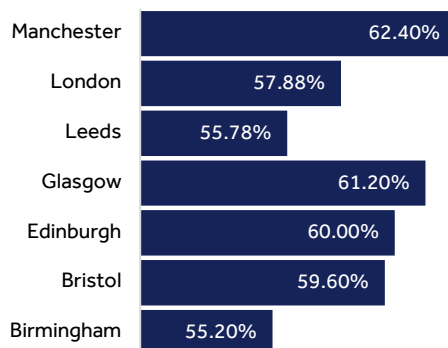
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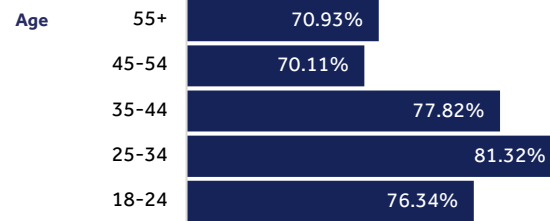
Culture & nightlife (58.7%)



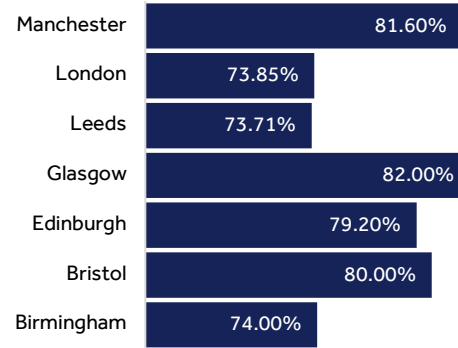
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Friends & social networks (77.3%)



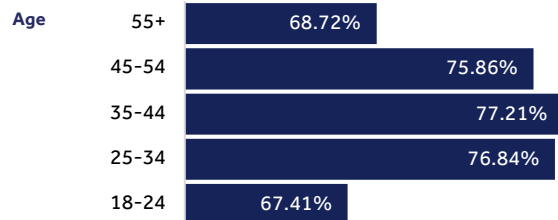
City



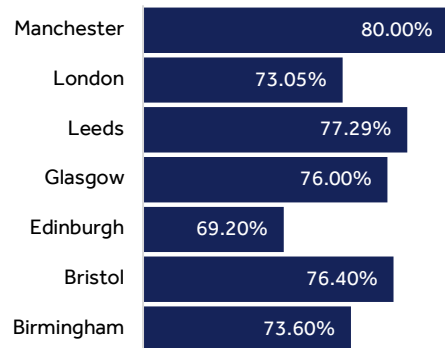
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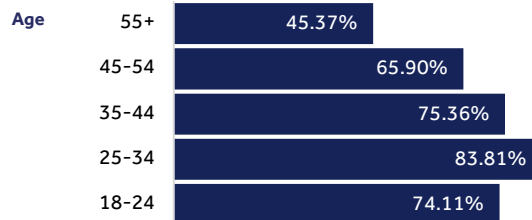
Family (74.8%)



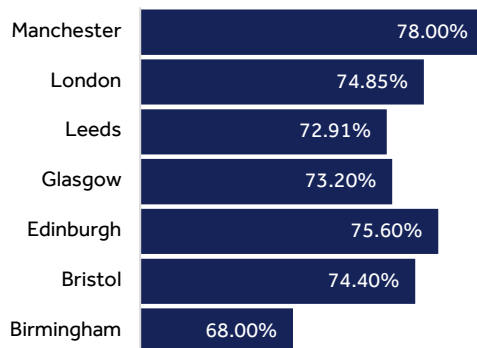
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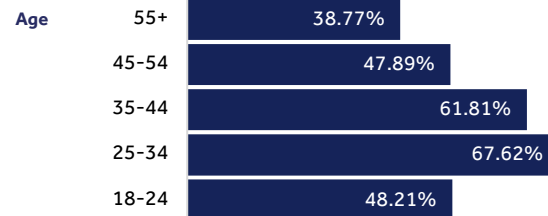
Work/office (74%)



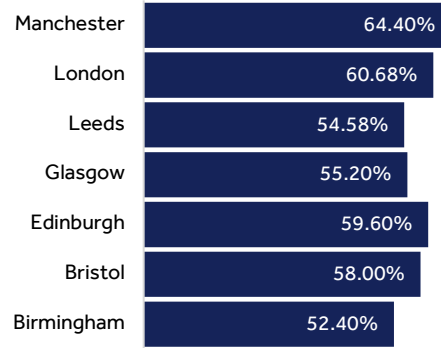
City



Airport or travel hubs (58.2%)



City





Bidwells
Bidwell House
Trumpington Road
Cambridge CB2 9LD

01223 841 841
info@bidwells.co.uk
www.bidwells.co.uk

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