



What's Driving the Future of Rented Living ?

What will I be covering today ?

- Design shift
- BTR
- Co-living
- In practice
- Lessons learnt
- Rightsizer



Design

shift

A shift in design focus over the last 10 years

SAFETY 

 **Culture**



 **Beauty**



Wellbeing

Community focus

 **Local**

Flexibility 

NATURE AND GREENING 

Affordability   

 **Designing for density**

 **Sustainability**

 **Co-location of uses**

Social value 

Single family housing 

 **Net Zero**

 **MMC**

Coliving

BIG BRANDS 

A shift in design focus over the last 10 years

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Affordability  **£££**

Designing for density 

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Net Zero 

MMC 

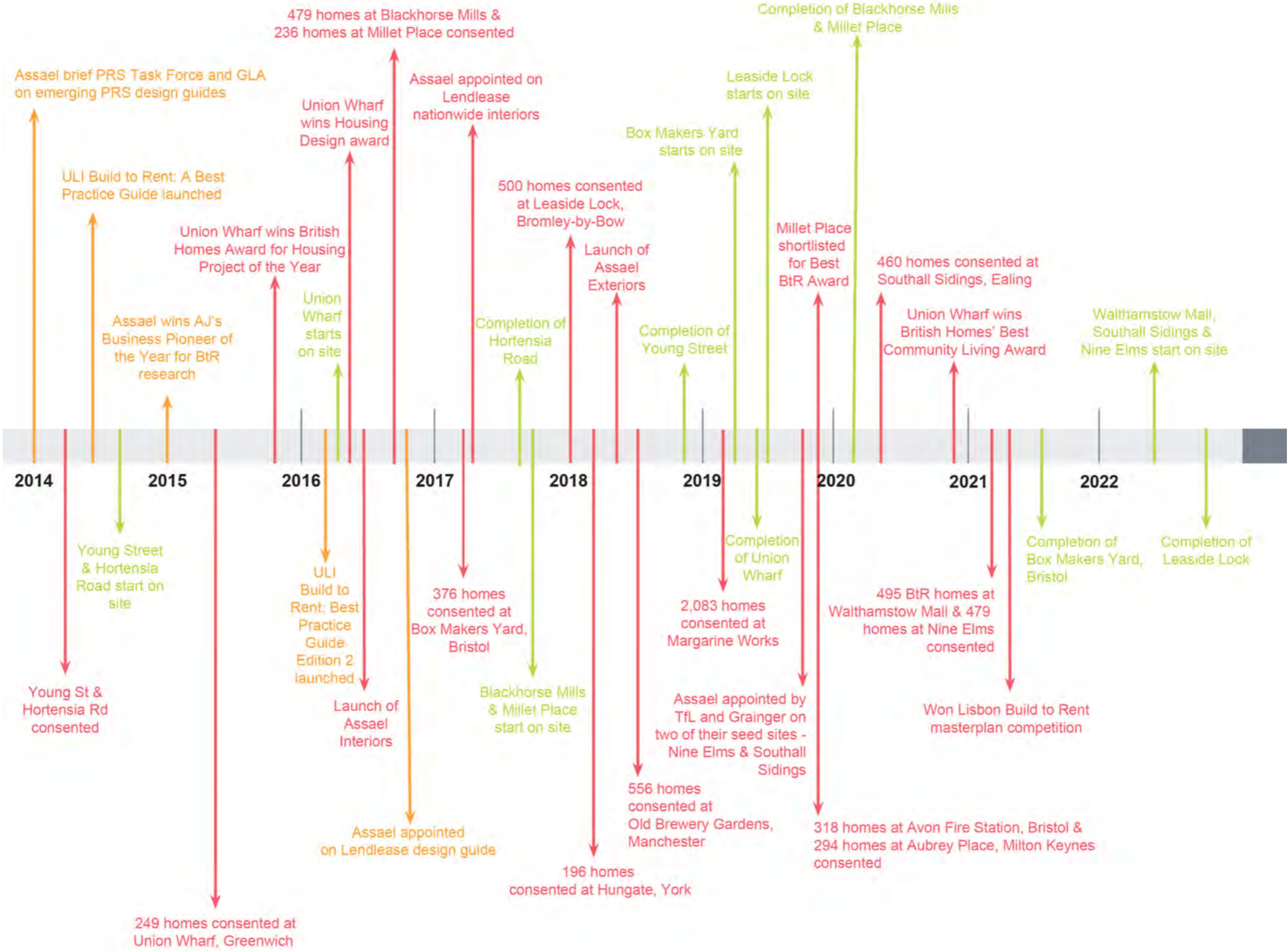
Co-location of uses 

Single family housing 

Coliving **BIG BRANDS** 

BTR

Strategy
Design
Implementation



Blackhorse Mills

Client: Legal & General
Location: Waltham Forest / London
Site area: 1.6 ha
Homes: 479
GIA: 45,340 sq m
Status: In use

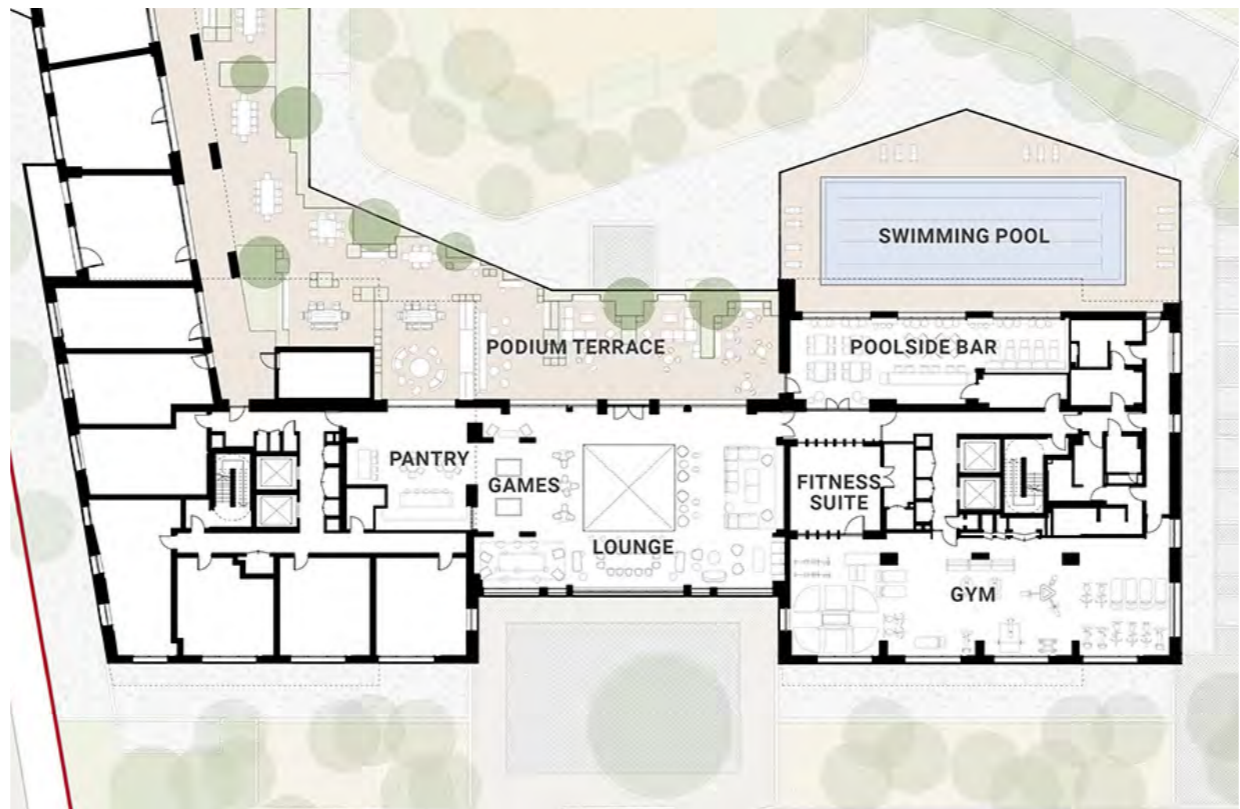
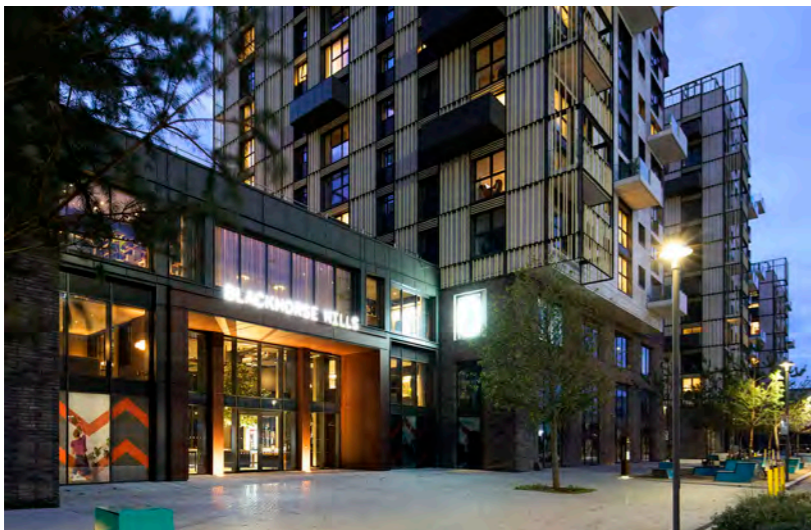
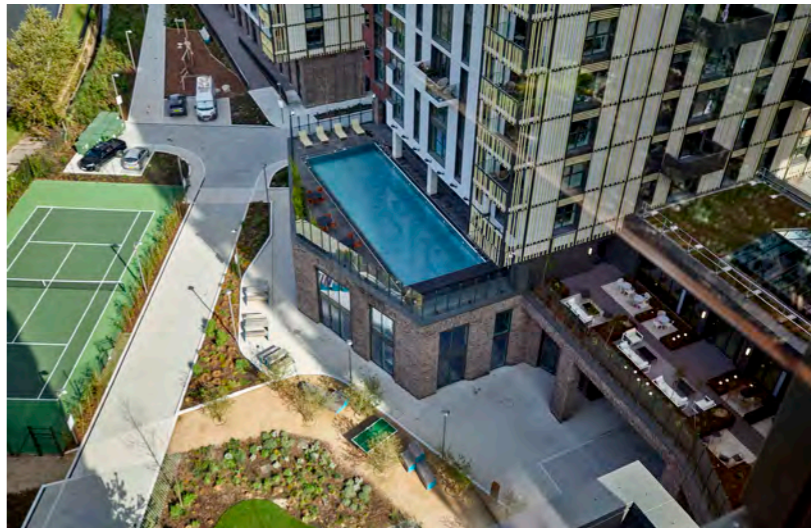
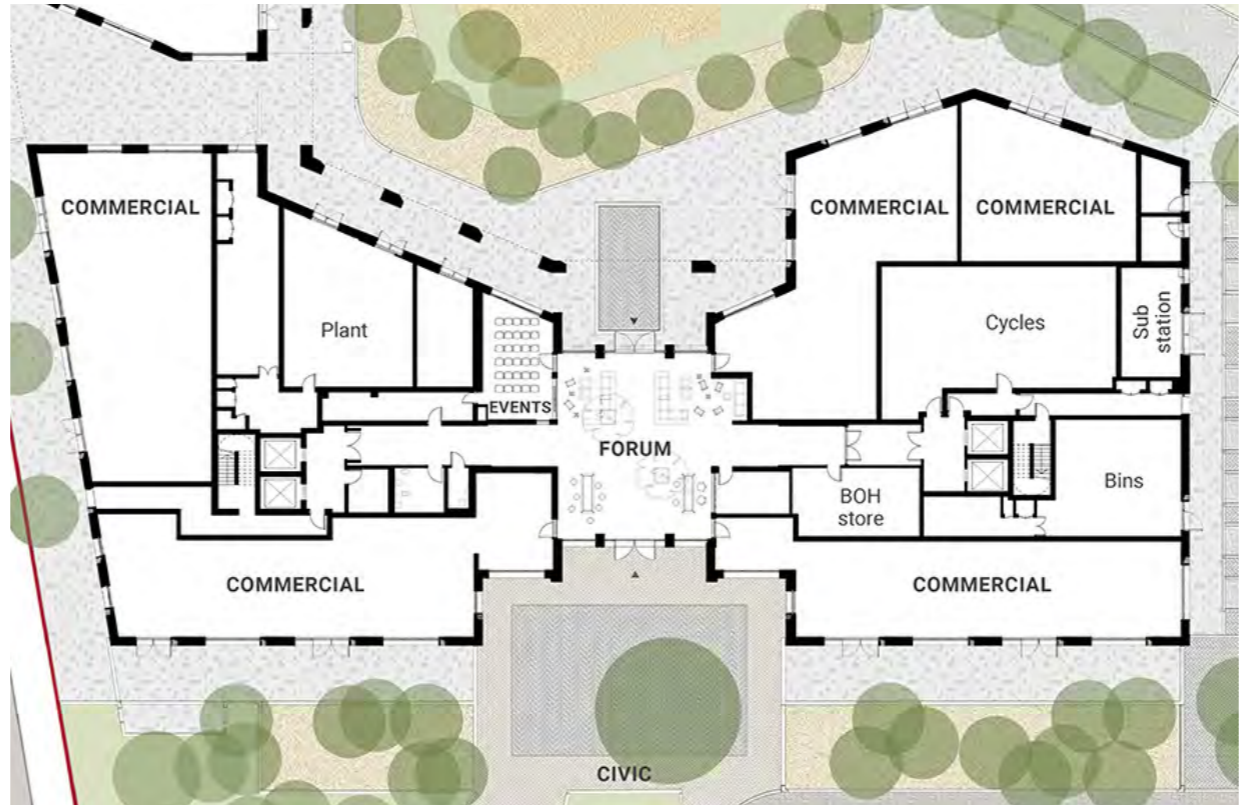


- L&G's flagship BTR development along the edge of Walthamstow Reservoirs
- Appointed to redesign a for-sale scheme for Build to Rent, resulting in an uplift from 311 to 479 homes
- Layout focuses around the site's environmental context with an ecological corridor that protects local wildlife
- 479 Build to Rent homes across five buildings, connected by an elevated podium with views across the water and residents' amenities, including a heated outdoor pool, extensive gym area, BBQ and dining areas
- 'Forum' open to the public for community use alongside commercial hub with local foodstore and SME start-ups
- DfMA led to efficient layouts and management



Awards

2020 WhatHouse? Awards - Silver for Best Build to Rent Development



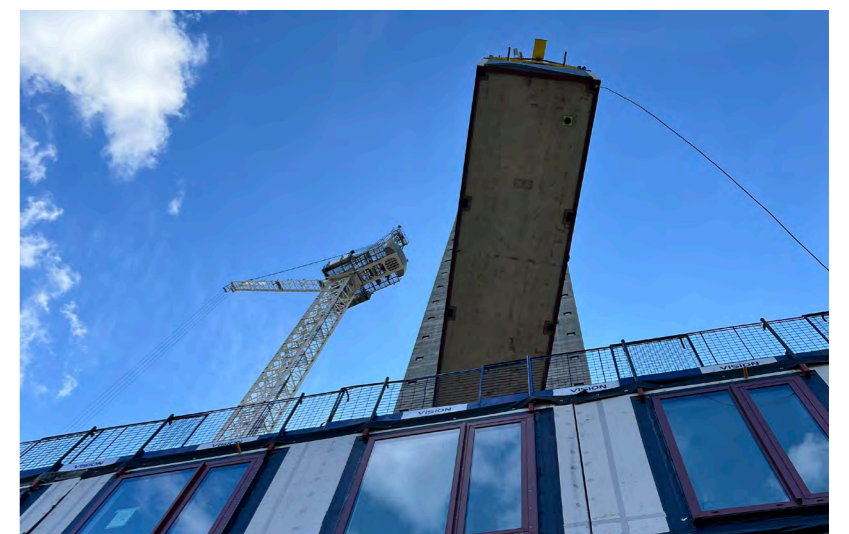
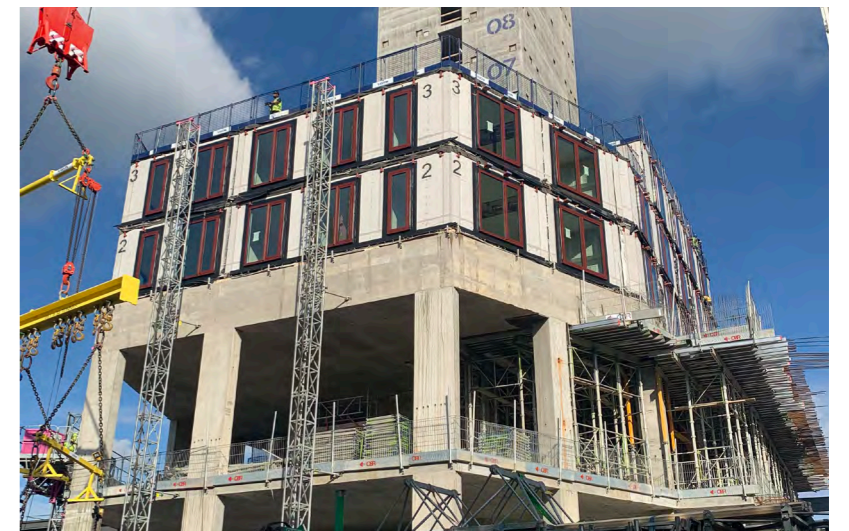
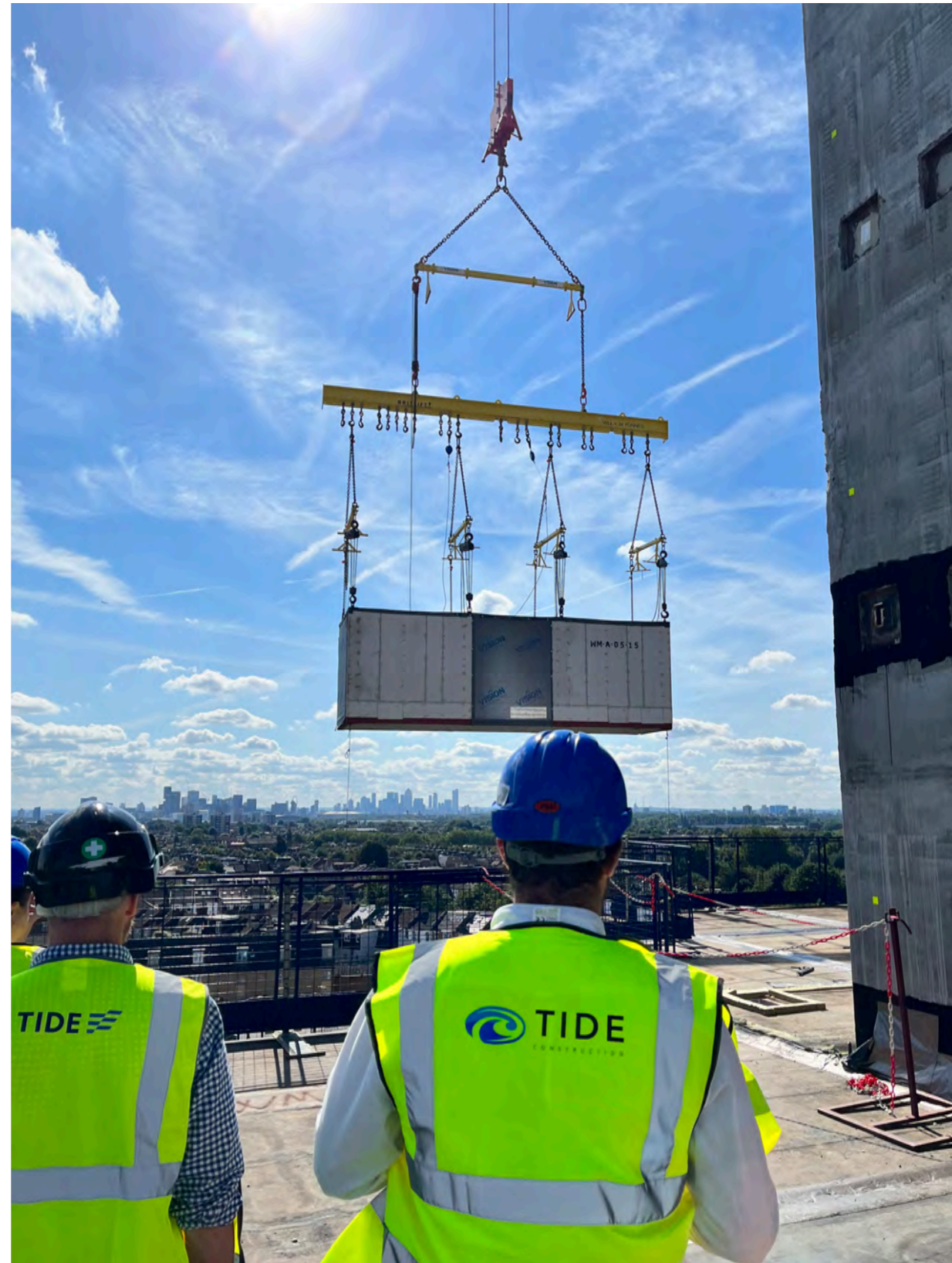
Walthamstow Mall

Client: Capital & Regional /Longharbour /Tide
Location: Waltham Forest / London
Site area: 0.27 ha
No of homes: 495
GIA: 46,350 sq m
Status: Construction



- Forming part of the wider regeneration of Walthamstow Mall, Assael is working on the design and delivery of 495 Build to Rent homes across two tall buildings.
- As a whole, Walthamstow Mall's regeneration for Capital & Regional includes a new tube entrance and retail, town square improvements and 538 new homes. Assael has been developing the Build to Rent element comprising 495 apartments and 2,200 sq m of shared amenity and commercial space across two dynamic point buildings of 34 and 27 storeys, which were designed to respond to, and be recognisable from, the wider context.
- The buildings will be operated by Long Harbour's Way of Life, and, with a DfMA approach deployed from the early stages of design, Assael has been working with Tide Construction to deliver the scheme using their Vision modular system.





Leaside Lock

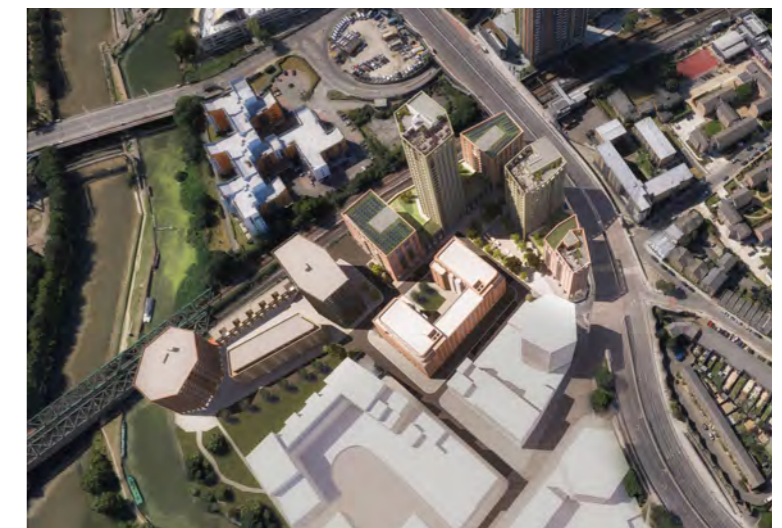
Client: Guinness Partnership
Location: Tower Hamlets (LLDC) / London
Site area: 0.99 ha
Homes: 500
GIA: 50,000 sq m
Status: Under construction

- Forms the southwest corner and first phase of the collaborative Bromley-by-Bow South masterplan located within the administrative area of the LLDC
- 500 new homes across a range of tenures, including Build to Rent and 50% affordable, alongside generous internal and external amenity space
- Five buildings surround a new urban square, activated and lined by a mix of flexible work, community and retail space at the lower levels
- Other uses provide a buffer between the residential and square from the bounding railway and A12 busy road
- Architectural design takes inspiration from its locality with red brick referencing the former industrial use and pale green large pre-cast concrete reflecting the tideline
- Architecture commended by Quality Review Panel as “outstanding”



Awards

- 2019 Housing Design Awards - Shortlisted for Project Award
- 2018 New London (NLA) Awards - Shortlisted for Mixed-use



JLP Waitrose Bromley

Client: John Lewis Partnership
Location: Bromley / London
Site area: 1.5 ha
Homes: 353
GIA: 35,000 sq m
Status: Planning Submitted RIBA 3

- Working with the John Lewis Partnership (JLP) to redevelop a key site in Bromley South as the first Build to Rent development in their portfolio
- Vision is to improve the existing Waitrose store, public realm and pedestrian experience and deliver 353 high-quality, energy-efficient Build to Rent homes in a sustainable and well-connected location
- Three residential buildings, positioned around and above the improved Waitrose store and car park
- Surrounding a new active public square with children's playspace and spill-out seating from the ground floor café

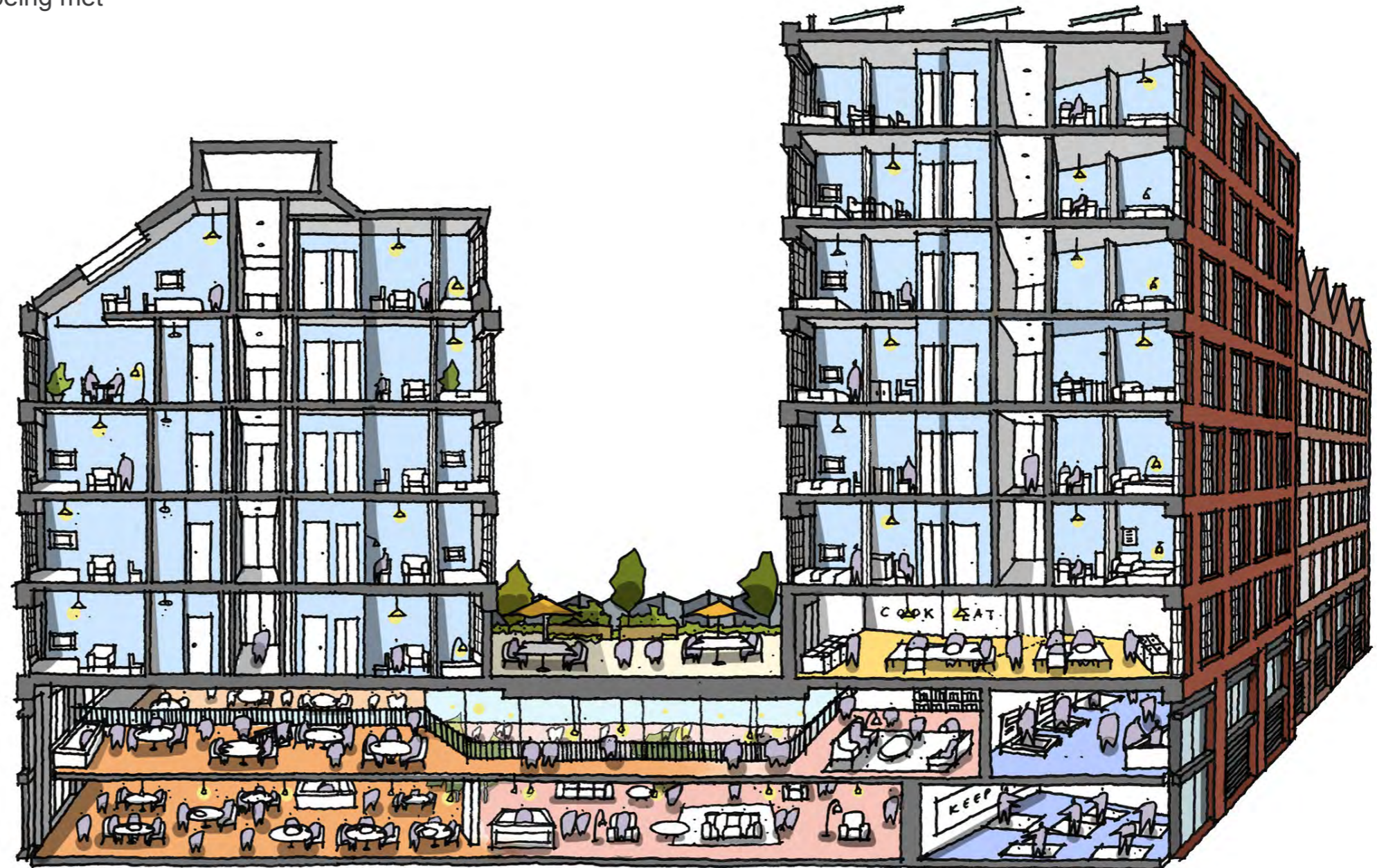




Co-living

What is co-living?

Co-living is an innovative form of living and solution for urban renters whose needs aren't currently being met by the general housing market.

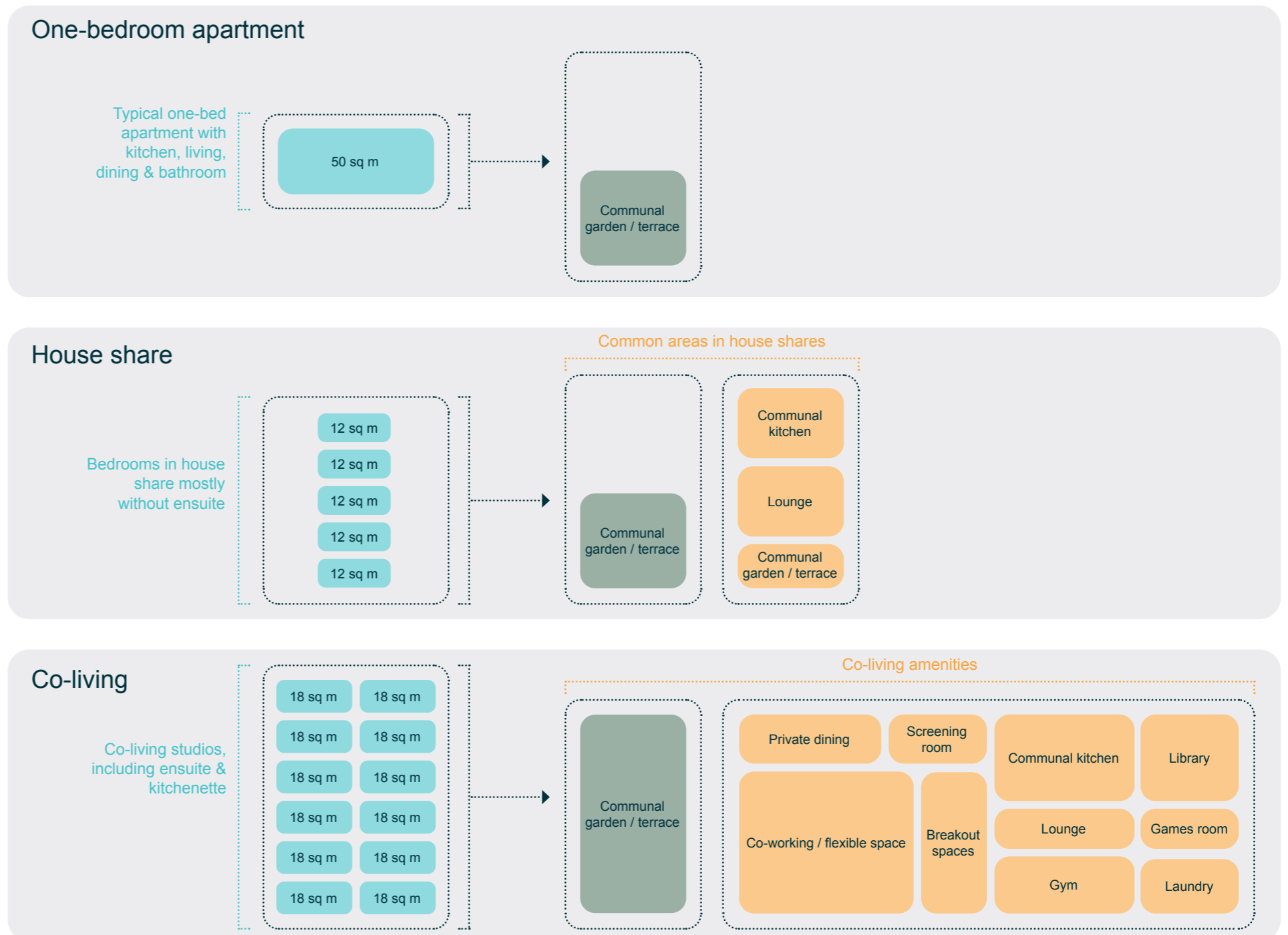


Co-living vs HMOs

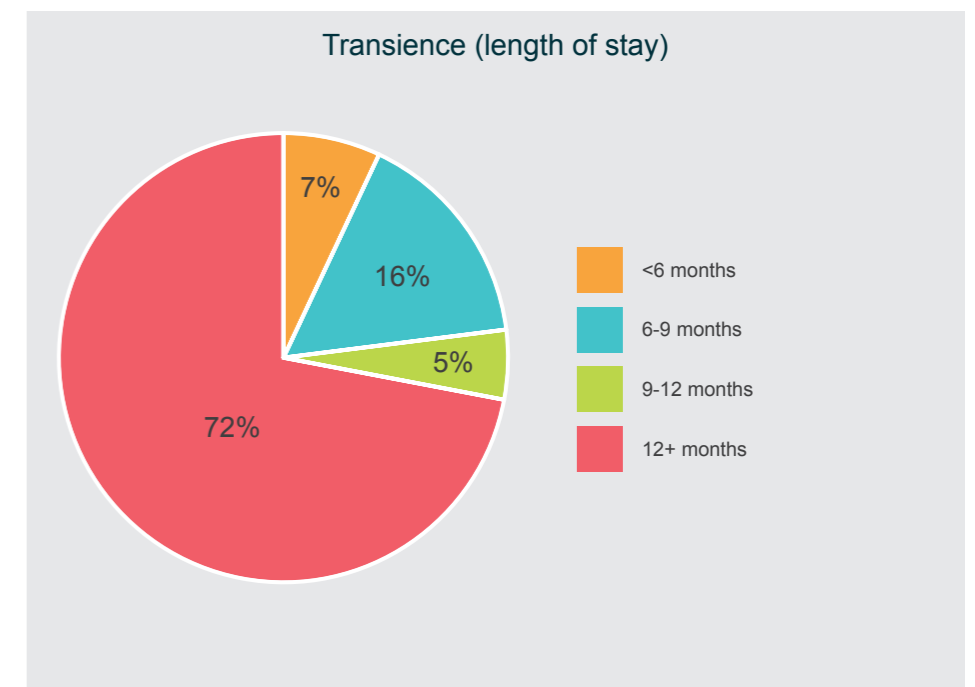
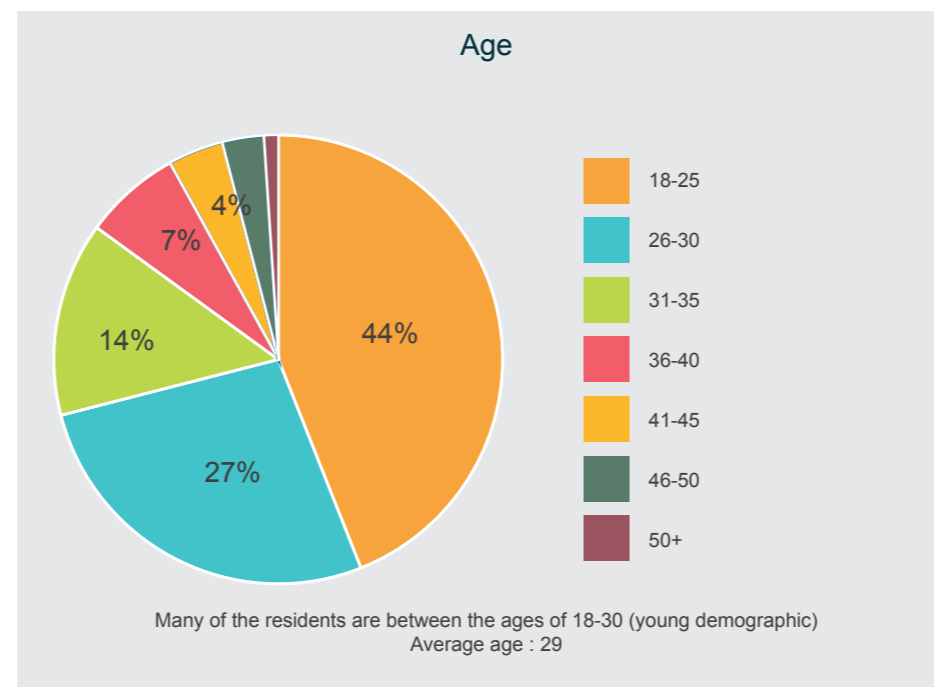
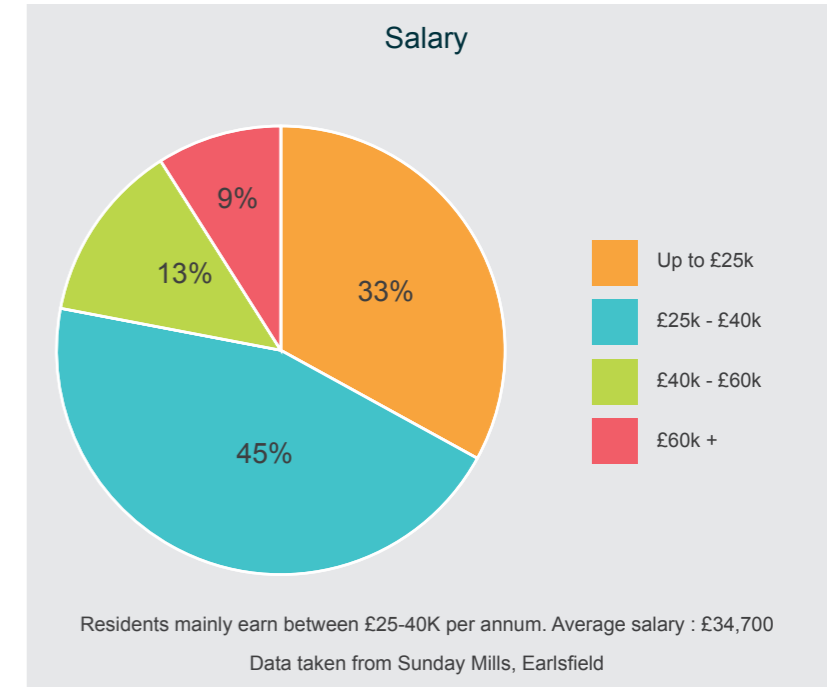
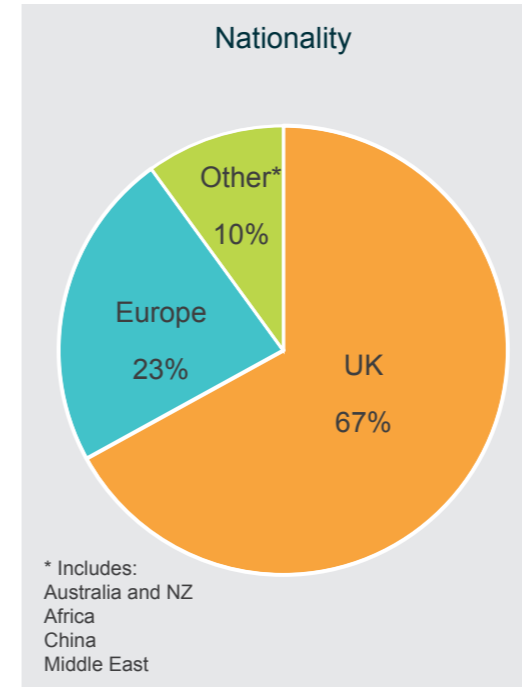
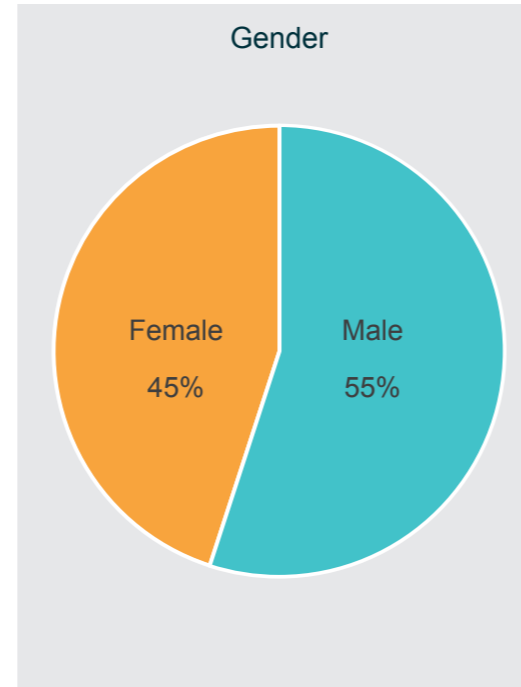
Co-living takes the components of multiple house shares (HMOs) and consolidates them into one building, making the space more efficient and increasing the amount of shared space that each person has access to.

The benefits of co-living developments include:

- Highly specified and convenient private dwellings
- A diverse range of high-quality communal spaces
- A safe, accessible and community-focused environment
- Flexible lease lengths (3-12 months) with no deposits required
- All-inclusive billing (utilities, gym, etc)
- 24-hour community with on-site maintenance and security
- On-site events programme
- Strong engagement with the local community



Who lives in co-living developments?



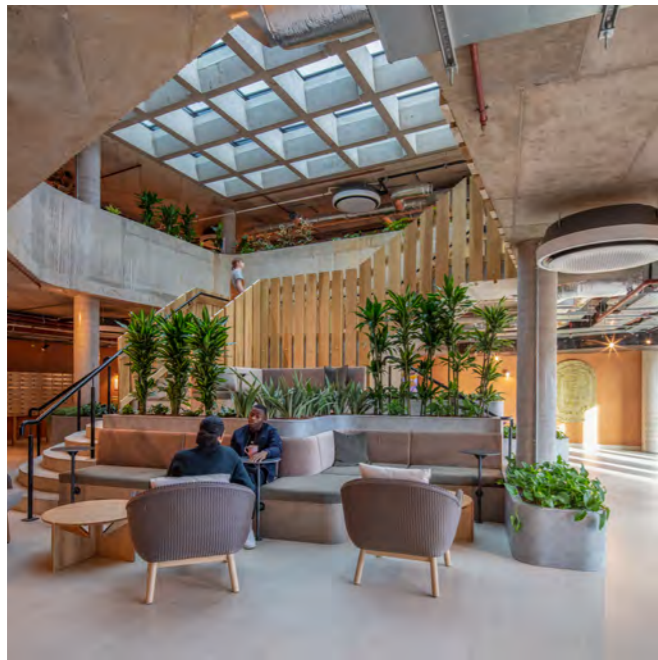
Figures based on analysis of existing co-living schemes in London

Co-living building arrangement - Shared ethos

The design and operation of a shared living development is structured into four clearly defined zones interlinked with circulation spaces and cores.

Zone 1 - Front of House

- Managed developments; include a 24-hour reception concierge
- Ground floor is often completely permeable and open to the public



Zone 2 - Residents' shared areas

- Areas for all residents to use, including roof terraces, kitchens, gyms, cinema rooms etc
- Larger and more variety than those found in a house share
- Procured events to encourage a community and combat loneliness



Zone 3 - Co-living studios

- All rooms include an ensuite, kitchenette and bedroom space, and integrated smart storage
- At least the same size as, but normally larger than, private bedrooms of a house share



Zone 4 - Back of House













- Servicing areas where residents do not have access
- Include staff offices, delivery storage, and servicing and plant rooms












Co-living - Features

All residents / members pay an all-inclusive monthly charge, which includes access to all amenities, fully furnished studio apartment, cleaning, bills, WiFi, linen changes etc.





Shared spaces

 GYM	 YOGA STUDIO	 COMMUNAL KITCHEN
 GAMES	 LOUNGE	 DINING ROOM
 SCREENING ROOM	 LAUNDRY	 LIBRARY
 EXTERNAL TERRACES	 ROOF TERRACES	 BBQ







Convenient rooms

 DOUBLE BED	 ENSUITE	 WARDROBE
 STORAGE	 UTENSILS	 WORK DESK
 KITCHENETTE	 FLAT SCREEN TV	 CENTRAL HEATING

Community support

 24-HOUR STAFF	 DAILY EVENTS	 COMMUNITY MANAGERS
 RESIDENTS' APP	 CAFÉ / RESTAURANT	 CO-WORKING SPACE

All inclusive

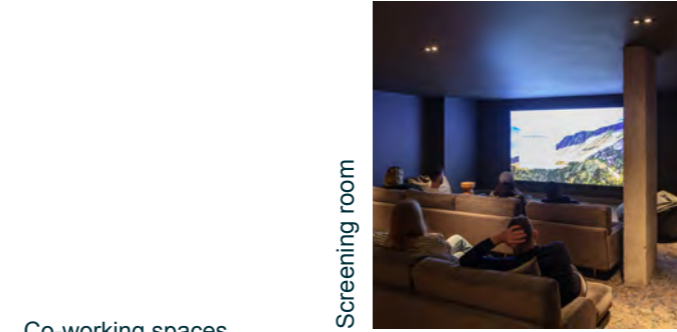
 CONCIERGE	 CLEANING	 LINEN CHANGES
 SECURITY	 FAST WIFI	 ALL-IN UTILITIES

Shared facilities

- Include all of the typical spaces you would have in a house share, such as shared kitchen and living areas, but these are greatly enhanced and offer greater variety of sizes, types and facilities
- Foster human connection and enable people to lead more fulfilling lives
- Often used to host a series of procured events run by management and members to help combat loneliness for residents and the local community
- Co-living buildings benefit from an active and public-focused ground floor that connects the building to the wider community.
- Many shared spaces are accessible to the public, local businesses and community groups
- ‘Masterchef’ style kitchens are often part of the offering; large communal kitchens for the entire building rather than multiple small kitchens. Reasons for this include:
 - Less security and management issues than individual kitchens
 - Avoids cliques forming on floors
 - Can double as a teaching and event space for residents
 - Can open out onto an outdoor eating and growing terrace



Lounge



Screening room



Co-working spaces



Masterchef kitchen



Laundry



Bookable private dining room



Terraces



Residents' gym



In practice

Our co-living journey

Sunday Mills
Appointed



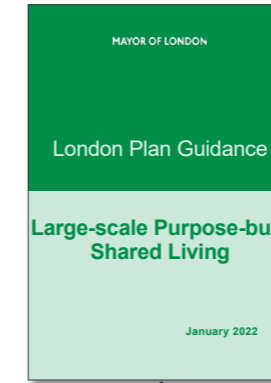
Sunday Mills
Planning consented



Sunday Mills
Start on site



London Plan guidance
on large-scale purpose-
built shared living
Published by GLA in
January 2022



Sunday Mills
Completion



European Co-Living
Best Practice Guide
Published by Urban
Land Institute & JLL in
October 2022



2018

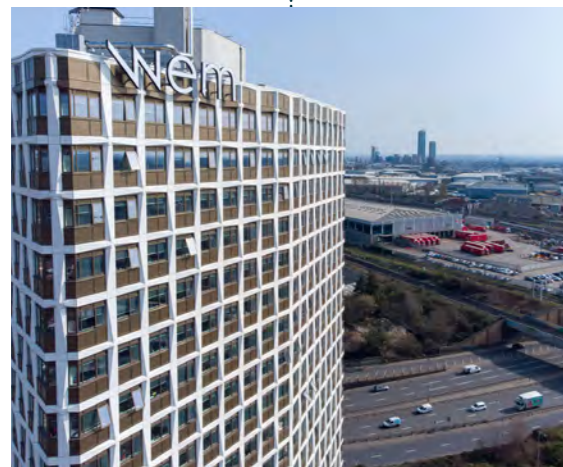
2019

2020

2021

2022

2023



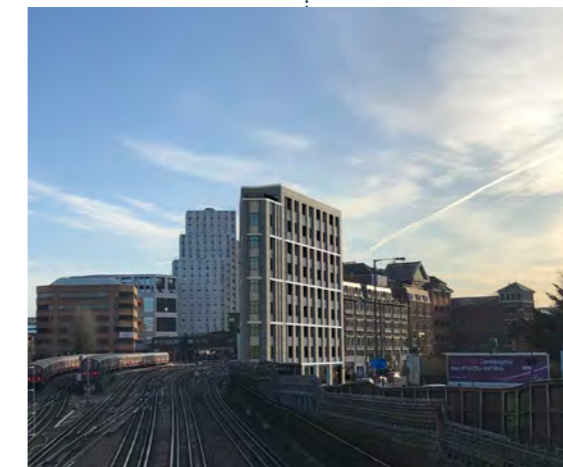
WEM Tower
Approval (PD)



Florence Dock, Battersea
Planning consented



Nineyards, Kingston
Planning consented



Lowlands Road, Harrow -
Planning consented



Florence Dock, Battersea
Completion

Sunday Mills

Client: DTZi + Halcyon Development Partners
Location: Wandsworth / London
Site area: 0.54 ha
Rooms: 315
GIA: 11,200 sq m
Status: In use

- Pioneering 315-studio co-living development offering Londoners an alternative form of living with extensive shared amenities that encourage social interaction
- Amenities include a gym, yoga studio, library / lounge, multi-station 'Masterchef' kitchen, and rooftop terraces
- Nestled along the River Wandle, the contextual design harnesses its riverside setting with extensive landscaping, enhanced biodiversity, a new pedestrian bridge, and publicly-accessible ground floor spaces that open up the site to neighbours and local businesses
- Architectural design inspired by industrial heritage of the site with robust materials, varied roof forms and brick colours, emulating a collection of buildings emerged through time, like historic mills

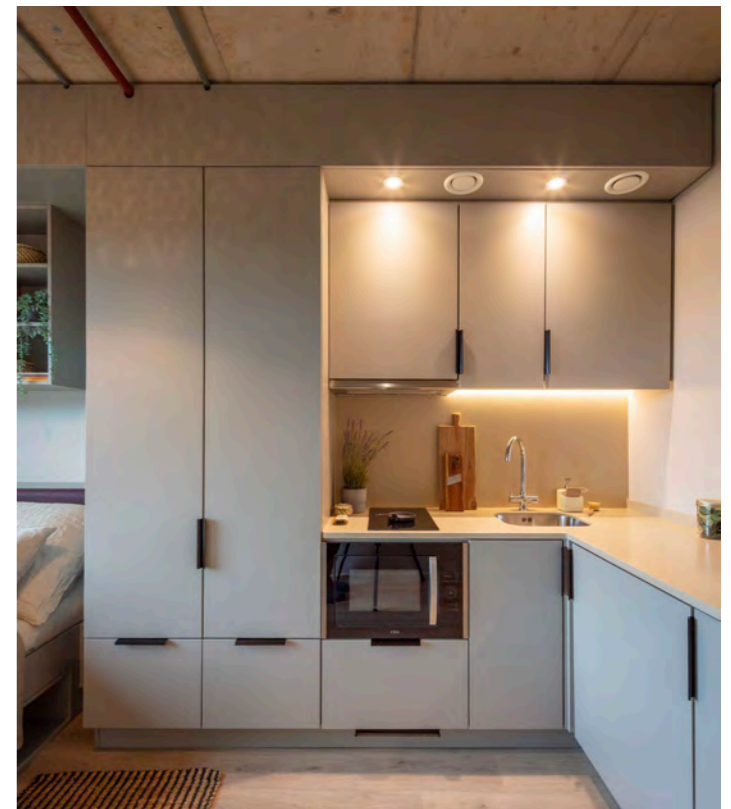


Awards

- 2023 AJ Architecture Awards - Shortlisted for Housing Project
- Building Awards - Shortlisted for Housing Project of the Year
- Coliving Awards - Shortlisted for Building & Architecture
- British Homes Awards - Shortlisted for Best Community Living
- British Homes Awards - Shortlisted for Development of the Year
- 2021 New London (NLA) Awards - Shortlisted for Unbuilt Award
- 2020 Housing Design Awards - Shortlisted for Project Award



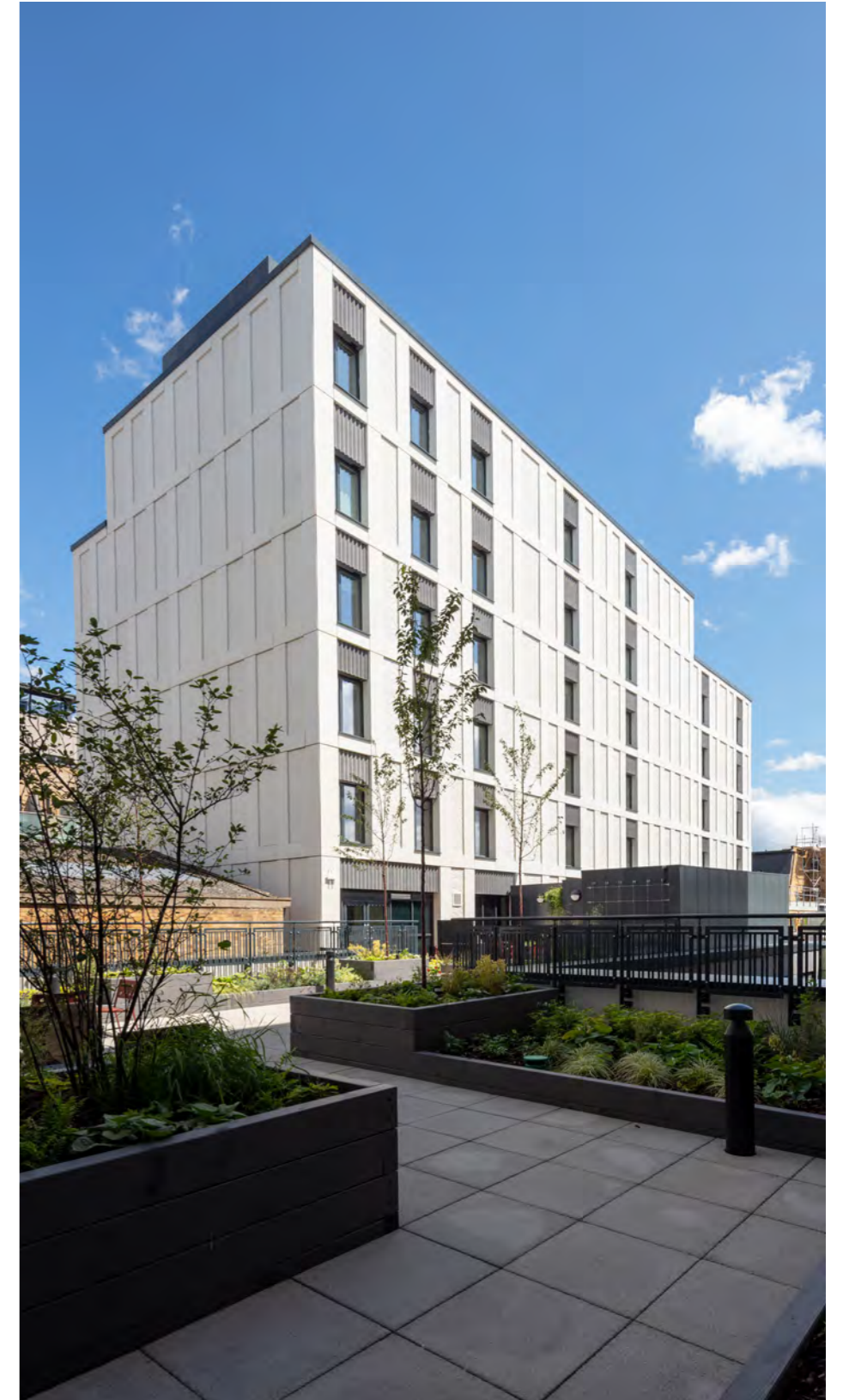




Florence Dock, Battersea

Client: DTZ Investors & Halcyon DP
Location: Wandsworth / London
Site area: 0.17 ha
Rooms: 270
GIA: 10,280 sq m
Status: Construction

- Mixed-use development delivers a flexible co-living and hotel offer across two buildings
- 239 long-stay co-living rooms and 31 short-stay hotel rooms alongside a variety of amenity spaces throughout the development, including cinema, wellness suite and Masterchef-style kitchen
- Variety of podium gardens and rooftop terraces, designed by Assael Exteriors, with views over the Thames
- Two buildings connected by a publicly-accessible ground floor, including areas for co-working, community use and events
- Clean and simple monochromatic palette utilises depth and texture of a precast concrete design to give variety and detail to the façade





Florence Dock, Battersea

Layout

- Co-living studios
- Short-stay hotel rooms
- Residents' amenity
- Community spaces





Nineyards Kingston

Client: Viewranks Estates
Location: Kingston / London
Site area: 0.12 ha
Rooms: 200
GIA: 8,000 sq m
Status: Technical design

- Replacing a run-down town centre retail store, the vision is to create a flagship co-living concept for Kingston to provide high-quality and innovative shared living
- Provides an offer to help retain university-leavers and young people in the borough
- 200 co-living studios sit alongside generous residents' shared spaces
- The design responds to the site's history as a cinema and public forum by creating a new community hub; a publicly-accessible 'field-to-fork' restaurant and flexible co-working space at ground floor activates the corner and brings footfall to the town centre
- The architecture references the site's art deco heritage as well as the current and emerging townscape, stepping up in height towards the Bentall Centre
- Staggered heights create a series of external gardens and roof terraces



High Street, Woking

Client: Halcyon & JRL Group
Location: Woking / Surrey
Site area: 0.19 ha
Rooms: 315
GIA: 12,850 sq m
Status: Planning

- Regeneration of a key town centre site along the High Street in Woking
- 329 co-living studios with a range of shared amenities, including a 'Masterchef' kitchen, bookable dining room, co-working space, gym, bar and lounge
- Several external landscaped terraces and public realm, designed by Assael Exteriors, improves biodiversity and enhances urban greening
- Ground floor activated by by a new purpose-designed, vibrant community hub for The Lighthouse - a charity that currently occupies part of the site
- Design retains and refurbishes the locally listed façades and introduces new forms, ranging in height from two to 17 storeys, that respond to and respect the scale, urban grain and appearance of the Conservation Area
- Design has been developed to be constructed using modular construction



Lessons learnt

The people

In use - data

Demand: 95% occupied within 3 months, exceeding the lease up target by 3 months

(40% pre-let before the formal opening date on 5 November with marketing starting on 1 October 2022)

Discount market rent studios leased quicker, underlining the need and popularity of this type of affordable accommodation

Average age: 31

Age range: 18 – 66

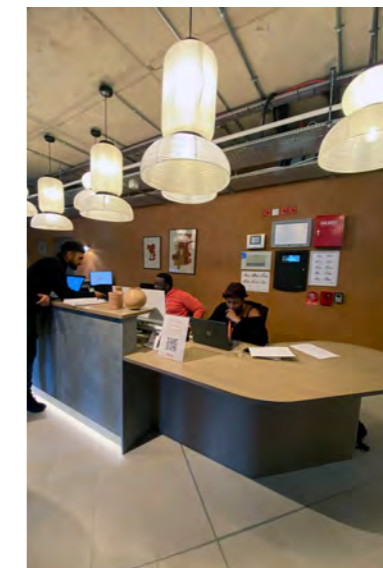
Average salary: £34,700

Occupations of residents: Vary from baristas to florists to pilots to lecturers. High levels of entrepreneurs and those engaged with local causes

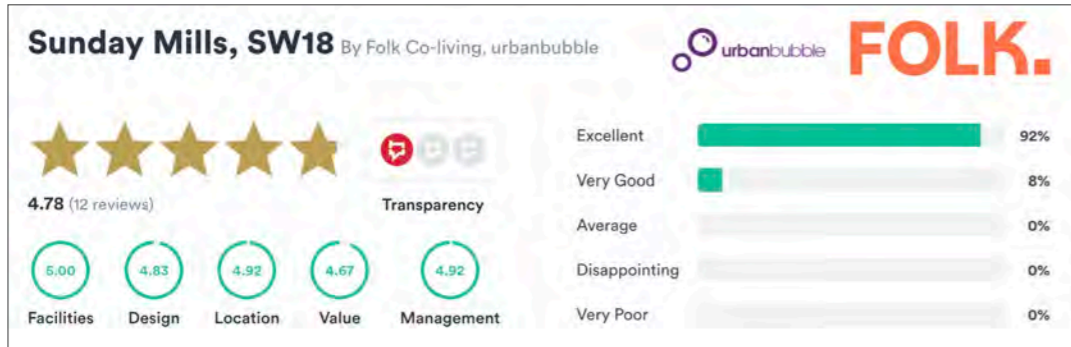
Contracts: 3-12 months (in monthly intervals)

Take up of 12 month contracts: 65%

Sunday Mills uses a management app to record a range of data, including maintenance issues and use of spaces, which will be used to analyse efficiencies and improvements over time



The people



“A Second Home”

★★★★★ Serena (Private Tenant) Review Date Jun 2023

Living at Sunday Mills has been an amazing experience, characterised by a blend of comfort and opulence. The establishment exemplifies the concept of luxury co-living in London, and I couldn't be happier with my decision to reside here.

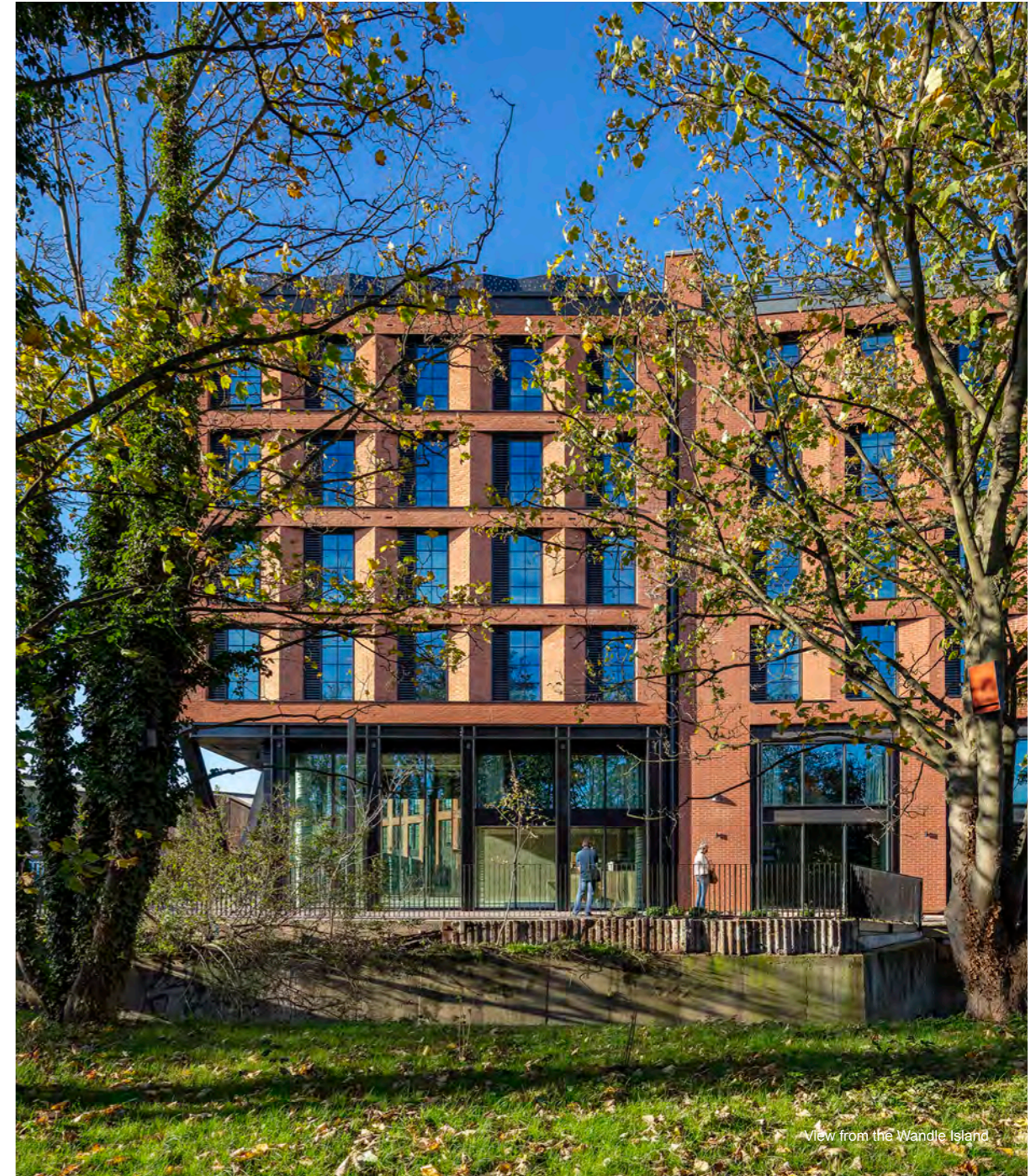
“Outstanding overall experience”

★★★★★ Octavian (Private Tenant) Review Date Jun 2023

The design is very fluid and elegant, with a very good choice of color pallet. The facilities are top quality, with a gym, cinema and working space on site, the rooms are very nicely finished and decorated. The staff is extremely friendly, being a core part of the building's community. The management is appropriate, the building being kept clean and supplies being provided. The events are fun and provide a good opportunity to bond with the community. Overall an outstanding option for residents.

“Perfect Studio for singles/young couple”

★★★★★ ✓ Verified Resident Aleena S (Private Tenant) Review Date Jun 2023



View from the Wandle Island

Co-living Best Practice Guide

- Collaboration with a steering group of industry specialists
- Assael helped to produce the Urban Land Institute and JLL's European Co-living Best Practice Guide.
- Assael's contribution includes our lessons learned from many years of researching, designing and delivering co-living developments
- With the rapid growth of the co-living sector in Europe, the guide explores co-living as a new housing sub-sector that aligns with changing socioeconomic conditions, housing affordability and evolving lifestyle preferences
- The report outlines key recommendations that industry players, both in the public and private domain, should adopt to promote the success of the sector

THE EUROPEAN COLIVING BEST PRACTICE GUIDE

EXECUTIVE SUMMARY

The ULI and JLL European Co-living Best Practice Guide has been formulated to provide greater insight into the rapidly evolving co-living sector across Europe—and to provide an expert view on market-leading examples of best practice in the sector.

As more and more cities struggle to provide appropriate, affordable housing for a rapidly growing urban population, co-living offers a powerful opportunity for tailored community-centric living catered to smaller and single households, often new to the city and looking to build up a network. The existing housing stock in many cities is often not tailored to these groups and generally does little to address the social challenges that they face related to loneliness and an absence of a strong network. On an all-cost basis (including rent, bills, subscriptions, etc), co-living is often competitive with other forms of living, especially when considering the lack of upfront required investments for furnishing and deposits.

These shared living arrangements can also contribute to the wider environmental, social, and governance (ESG) agenda, as there are considerable efficiency gains to be achieved via resource and amenity-sharing models. The reuse and repurposing of disused buildings and existing assets can push these environmental achievements further. It is important to acknowledge some of the challenges the sector faces, partly related to its longstanding history with the informal co-living structures, which have not always

CASE STUDY: SUNDAY MILLS, LONDON, UK

Sunday Mills is a co-living development under construction in Earlsfield, Wandsworth, South London, designed by architecture firm Assael Architecture for Halyon Development Partners and DTZ Investors, to be operated by FOLK Co-Living. It stands out as an example of how biophilic design can be embedded in a development's external architecture and interior design, to promote resident and neighbourhood wellbeing.

Borrowing from the industrial nature of its surroundings and the River Wandle, which once powered tobacco, paper, and textile mills, Sunday Mills blends into its setting. Its exterior is set with red brick, metal frames, escape staircases, criss-cross windows (black metal grid-framed windows), and exposed structures. The landscaping references the site's industrial past, whilst incorporating biodiverse planting along the riverbank enhancing the riverside location. Through this, the development establishes a material connection to nature whilst giving it a clear identity and sense of place synonymous with the River Wandle as a working river. The scheme includes a new footbridge and facilitates the extension of a key pedestrian route "The Wandle Trail".

The interior design (by Assael Interiors) follows the concept "wabi-sabi" - a traditional Japanese world view centred on the acceptance of transience and imperfection. In this case the earthy and industrial River Wandle. This manifests itself in the paired back material palette which utilises natural finishes such as exposed concrete ceilings, internal brickwork, and Macramé room dividers.

Architectural cues are used to stimulate interaction. A feature staircase and rooflights link both buildings and all assembly spaces, so these are visible to residents and visitors. The scheme features a wide variety of room types including duplex style rooms located within the pitched roof. Natural light at the end of all corridors and into stair cores or lift lobbies create places to pause and interact, whilst the roof terrace features vegetable growing areas and adaptable spaces that can be transformed according to residents' evolving needs.

A café and coworking space are located at the ground floor so they are accessible to both residents and the external neighbourhood, thus promoting wider engagement. These are visually connected with nature, surrounded by riverside views, to promote physical and mental wellbeing.

Sunday Mills, FOLK Co-living, London, UK

THE EUROPEAN COLIVING BEST PRACTICE GUIDE

RightsSizer

What is RightSizer?

- RightSizer is our collaborative response to the climate crisis. This hybrid MMC system, designed for 2030 and deliverable now, creates high-performance, regenerative and adaptive buildings.
- The system comprises a large span, triple height concrete superframe acting as the 100+ year 'Support' layer with an 'Infill' layer of reconfigurable components made from timber and remanufactured materials, made locally, and aiming for ultra low embodied carbon of 300kgCO₂e/m².
- RightSizer is an adaptive framework conceived to accommodate multiple use cases over its long life, from Student to Co-Living through to Build to Rent and Later Living, with vertically integrated urban amenities, serving people and communities through all stages of life.





Assael

www.assael.co.uk