



Student

Who we are

What we do

How we do it

NIDO

INSIGHTS

2020

WELCOME TO OUR BRAND NEW NIDO INSIGHTS REPORT.



From here on out, every year, we will be putting together this report to keep you up to date on our performance within our brand focuses.

The report looks at a number of key items and metrics from electricity usage, to the number of events we have run, to where we look to next with our newest residences.

We're hoping that by sharing our results with you, we can also look to monitor our year on year progress, setting and achieving not only goals for the business, but a healthier planet, a healthier set of students, and a community for one and all to enjoy.

WE HOPE YOU ENJOY IT.

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THE NIDO DIFFERENCE

Most student property brands are as good as each other. Great rooms, fast wi-fi, comparable pricing, easy locations. We offer security, prompt service and cool common areas... and we deliver. You've got lots of choice.

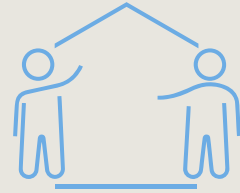
Now, the Nido difference. Our eyes are on the future. Not of our business, but of the planet and its people. We know that those who live with us will shape tomorrow. You're going to make the world kinder, more sustainable, healthier, smarter.

It begins in Nido. We listen to what students want in the places they live, and then we deliver it to them.

Our actions as a business are guided by your hope and vision.

You lead us into a better world.

NIDO.



Community



**WE CELEBRATE THE
MANY DIFFERENT
CULTURES AND
PEOPLE WHO LIVE
WITH US. WE THINK
A LOT ABOUT HOW
TO BRING PEOPLE
TOGETHER IN SAFE
AND HAPPY WAYS.**



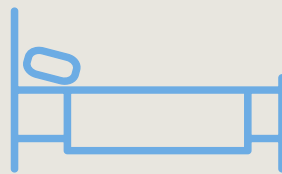
26

Buildings



182

Staff



7,630

Rooms



4

Operating countries



30

Partners



27

Nationalities across
all staff & students



128

Events

Our community grew in 2020 with the openings of Cork, Wembley, Walthamstow, Coventry, Groningen, Utrecht, and 12 buildings across Germany.

OUR SURVEY SAYS...



Nido outperforms average benchmarks for overall satisfaction including the average for university and private halls.

We see a positive NPS score of +31, which is excellent news and is some way above the benchmark for all private halls (+13) as well as being much higher than the -1 NPS score achieved for all university halls and a notable increase from Nido's Spring '19 score of +12.

Particularly impressive is that a third of students score Nido a 10 out of 10! Such a positive NPS score highlights that Nido provides students with a memorable accommodation experience.

In terms of individual residences, we see strong scores across the portfolio with Boyce House and Castle Hill performing very well. These residences also both have high NPS scores.

83%

**'very good/
good' rating**

● 83% of Nido students rate their accommodation positively 'very good/ good', not only this but levels of excellence are also particularly high with 45% rating their accommodation as 'very good'.

HELPING THE HOMELESS

Being a positive part of our local communities is one of the most important things on our agenda. With the help of Centrepoint and our not for profit partners, 4BYSIX each year around October time we take to the streets to hand out emergency blankets to those that need it most. As we approach the Winter period, keeping warm and protected is a huge challenge for the homeless, and one we and our students want to continue tackling.

Our voluntary efforts continue deep into the Winter, last year we partnered with Patch Plants and Centrepoint to decorate a local service to bring that much loved Christmas spirit to young people who need it. Here you can see Connor, Theresa, Melissa and Dominika with the finished product.





Centrepoint helps homeless young people. Their charity support homeless young adults aged 16-25, and they aim to end youth homelessness in the UK. Centrepoint are a fantastic charity getting young people off the streets, providing them a safe space within their many shelters, and the opportunity for quality education in order to offer a chance at a better life.

Our donation will pay for 15 group sessions supporting homeless young people in areas such as cooking, sport or art. These sessions help to build rapport, trust and self-esteem in young people while also serving as a platform to informally introduce them to other professionals who can help them achieve their goals of health, home and a job.



Our donation will also look to help answer 35 calls to their Centrepoint helpline, providing support and assistance to those that need it most.



Sustainability



WE'RE STRIVING TO MAKE EACH OF OUR BUILDINGS AS ENVIRONMENTALLY SUSTAINABLE AS POSSIBLE.

WE TALK WITH THE STUDENTS WHO LIVE WITH US ABOUT WHAT SUSTAINABLE ACTION IS IMPORTANT TO THEM, AND WE TRY TO ACHIEVE THIS.

The UK's per-capita CO₂ emissions in 2019 were 5.3t CO₂.

This is above the global average (4.8 in 2018), but below the EU average (7.0).

Meaning we are currently 4.55t CO₂ below the UK average per person.



4,438,814 kwh

Electric



7,274,223 kwh

Gas



2,378 t CO₂e

Emissions

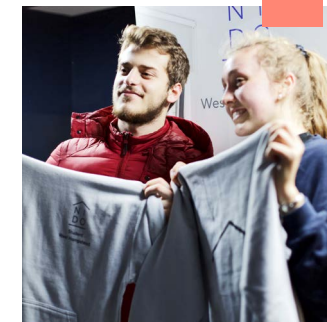


0.75

Emissions per bed

One of the reasons for our insights report is to monitor our carbon emissions performance. We want you to be able to follow our progress year in year out.

NIDO BLACKOUT



Introducing the Nido Blackout X Hoodie Handout, an exciting event designed to push the importance of sustainability in our residences and demonstrate how a small change can make a huge difference. In February, Nido Student house teams across the UK handed out Nido branded hoodies to our students to say thanks for living with us. But the fun didn't stop there.

After the handout, we invited our residents to turn off their heating, electrical appliances and lights and asked them to meet our residence teams outside the residence and celebrate saving electricity with their very own sparkler light display. Overall, we handed out over 571 hoodies!

We partnered up with our energy management consultants, Amber Energy, in order to track the effectiveness of the event. By gathering the statistics from the same hour in the previous week and building a comparison we are able to celebrate the efforts made by our residents.

We also invited Electric Pedals to supply our West Hampstead Blackout with super cool user-generated power pedal bikes. If our residents wanted to hear the DJ play, they had to pedal for it, so not only did we save energy, we created our own.

Overall, the Nido Student Blackout achieved an average drop of 2% in energy per residence, with our top performers being Cambridge Castle Hill with a drop of 15%, Glasgow St James with a drop of 11% and a 3% drop across all three of our Newcastle buildings; The Bridge, Stepney Yard and Union Square.

Nido's are constructed and designed to encourage sustainability in our customers.

PBSA

FEATURES

We asked our students and they value sustainability just as much as we do. One thing in particular our Nido students wanted to see less of was single use plastics.

So every new Nido features a Nido water re-fill station which our students use with their reusable bottles. We also use locally sourced and long-lasting materials. In particular we use materials that are 100% recycled, like Forbo's zerowaste energetic floor and Smile Plastic's tabletops made from plastic bottles, yoghurt pots and food packaging.

These features have gone in across our residences in Coventry, Wembley, Walthamstow, Cork, Groningen and Utrecht this year and are planned for all 2021 deliveries too.

FEATURES



Water refill stations



Table tops made of recycled yoghurt pots



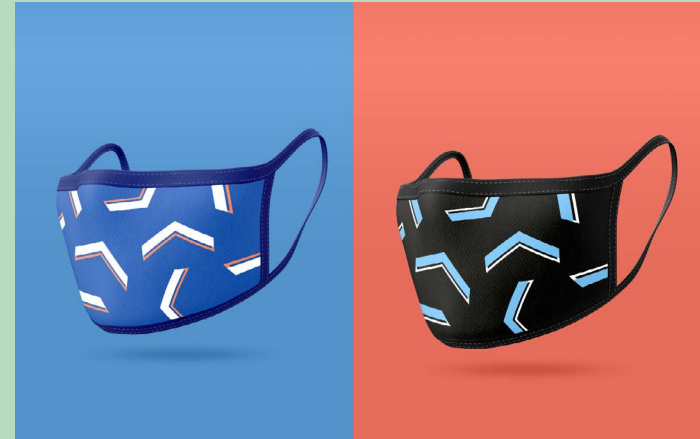
Sustainable giveaways at each residence

BRAND GIVEAWAYS

Our branded giveaways have had a refresh in the past couple of years. It's important that our giveaways now reflect our current Nido focuses, so we've done just that.

Our giveaways include branded eco-straws (sustainability), phone wallets (design & tech), pop sockets (design & tech), tote bags (sustainability), reusable bottles (sustainability) and recycled PET bottles (sustainability) to name just a few.

We pride ourselves on having the most unique giveaways in comparison to other accommodation providers, not only at our fair stalls but also as gifts for our students when they check in. This has definitely been an area that we've come out on top, in comparison to our competitors so we don't plan to stop any time soon!





Young People's Trust for the Environment is a British charity founded in 1982, to encourage young people's understanding of the environment. The charity's main goal is to give young people a real awareness of environmental issues such as climate change, pollution, deforestation and endangered flora & fauna.

YPTE have recently upgraded their website infrastructure with our donation. The site is now running on the latest version of its platform and they have made many other significant changes to their online donation facilities, which now enable donors to give recurring monthly donations as well as one-off payments.

The site upgrades were particularly important, because they were completed pre-lockdown period and saw a massive increase in traffic during lockdown. Almost 52% more visits from April to June 2020 when compared to the same period in 2019 (428,183 vs 282,116) and 71% more page views (1,027,405 vs 600,832). Lockdown has helped make YPTE even more of a resource for not only teachers and their students, but also parents too.



Our donation has helped YPTE in the production of some of their Home Learning Packs and Home Learning Activities that were produced from the start of June onwards. Providing students with extra resources for sustainable learning whilst studying from home.



Wellbeing



WE'RE COMMITTED TO THE WELLBEING OF INDIVIDUAL STUDENTS. WE THINK ABOUT THEIR QUALITY OF LIFE, AND THEIR PHYSICAL AND MENTAL HEALTH.

STUDENT WELLBEING

Wellbeing always has been, and always will be of the up most importance to Nido Student.

We've introduced mental health training for our General Managers in order to spot potential signs, and symptoms in our residents.

We donated £5,000.00 to mental health charity Mind UK to support the great work they and Time to Change are doing to help break the stigma of mental health.

Our virtual event programme is predominantly made up of wellbeing events, this accounts for over 60% of events run or planned for the future.

Over the course of our upcoming developments, we have designed and included wellbeing-based rooms and amenities, to give students the ultimate opportunity to relax in their home from home.

NSHS Insights

70%

■ of students feel their house team cares about their wellbeing

66%

■ believe their accommodation has had a positive impact on their wellbeing

● Above the national average for both scores.
Nido St James & Nido West Hampstead
outperform the industry in wellbeing

STAFF WELLBEING

We're continuing to work with Hero Wellbeing to provide online platform containing useful content that informs employees about the importance and impact of health and nutrition on wellbeing, how to maintain mental health and mechanisms to measure sleep and activity.

The webinars we held on various topics are posted on the platform and include Positive Mindset, Managing Anxiety, Boosting Immune System, Better Sleep to name a few. Aside from the platform, we have an Employee Assistance Programme that provides counselling and advice 24/7.



Nido's now include spaces like zen areas, yoga studios, running tracks, tranquil study spaces & roof gardens

PBSA

FEATURES

Wellbeing is on the agenda for young people, and it's firmly on ours. Our Nido team offer 24-hour service and support 7 days a week and we work with local charities and organisations to keep our communities happy and healthy. We also know that environment has a direct impact on mental health, particularly in young people. So new Nidos now include spaces like zen areas, yoga studios, running tracks, tranquil study spaces and roof gardens.

We're also striving to increase our biodiversity by 15% in the next year as we know that plants reduce stress levels, sharpen our mental focus, and purify our air. Natural light and colour choices are also important for promoting positive mental health. A recent study into the enduring popularity of millennial pink found that millennials link this colour directly to markers of childhood nostalgia (toys, milkshakes, cartoons) so its use in a space can subconsciously boost a student's mood.

TECHNOGYM

After surveying our students to find out how they felt about our current gym equipment in our residences, we found that they felt like our equipment was outdated. With our commitment to their wellbeing and the brand's design and technology capabilities, there was only one thing to do. Partner with the best tech gym provider out there, Technogym.

We implemented Technogym gyms at Coventry, Wembley, Walthamstow, Groningen and Utrecht this year.



Technogym is a manufacturer of high-tech gym equipment, designed to give you the most accurate readings and representations of your workouts.

time to change

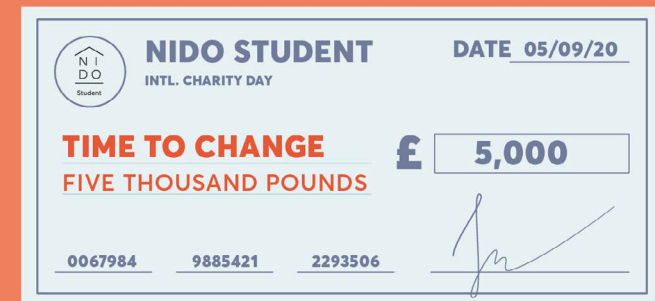
let's end mental health discrimination

Time to Change is a growing social movement working to change the way we all think and act about mental health problems. They've already reached millions of people and have begun to improve attitudes and behaviour towards mental health.

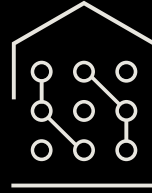
Despite the progress they've made, they know that many people still don't consider mental health relevant to them. They don't believe mental health problems are likely to affect them or people they know.

But the reality is that mental health can affect anyone. Statistically, 1 in 4 of us will experience a mental health problem in any given year. That's why their work is so important. No one should have to fear being treated differently because of a mental health problem.

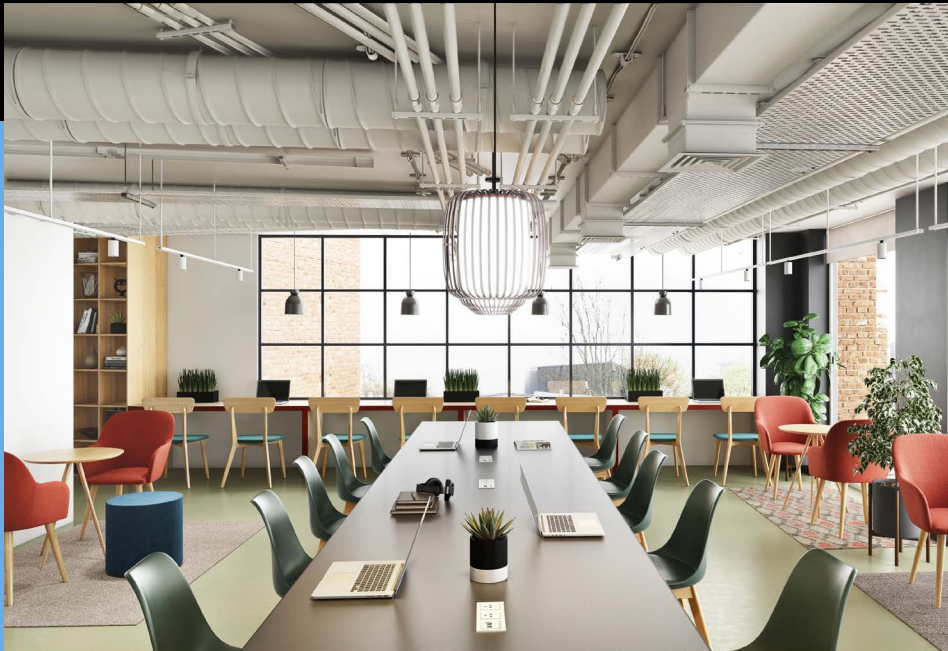
INTERNATIONAL DAY OF CHARITY



Our donation will help many of the services Time to Change and Mind offer, such as providing vital information and support to those in need via their infoline.



Design & Technology



**WE REMEMBER
THAT DESIGN, AND
TECHNOLOGY, IS
ESSENTIAL TO EMPOWER
LEARNING AND SELF-
DEVELOPMENT. WE
CREATE OUR BUILDINGS
AND ENVIRONMENT
WITH THIS IN MIND.**

NEW DEVELOPMENTS

Nido has had an extraordinary year, not just in figures, but in overseas expansion, investment in technology, its resilience in the face of Covid-19 and, importantly, in the services and experience provided to students.

This year saw unprecedented growth, with 2,255 operational UK beds rising to 7,824 internationally — with 3,000+ beds to complete in 2021. This rapid expansion means Nido has reached a truly global audience of 100 different nationalities. 2020 has been the year that Nido has truly gone global and, despite the challenges of Covid-19, its community is now closer than ever.

CGIS

CGIs have been an integral part of Nido's ability to launch new buildings quickly and start selling even before some features of the rooms or buildings have been developed.

They add such value to the offer and we've launched an exclusive relationship with a company called Upcircle to enable us to produce CGIs consistently and quickly moving forward. We have produced over 80 CGIs this year, which especially in tricky times like these have enabled us to work without photography or even show flats where we've needed to.

We always try to incorporate our values into the features of the building and rooms and in turn these are reflected in the CGIs.

NETHERLANDS

Nido mobilised two buildings, delivering 1,380 beds in Utrecht and Groningen and reached 100 percent occupancy in Groningen before opening. Our early market research meant we shifted from traditional year-round contracts to a short-stay model, a new audience segment in young professionals and we incorporated new features into the fabric of the buildings.



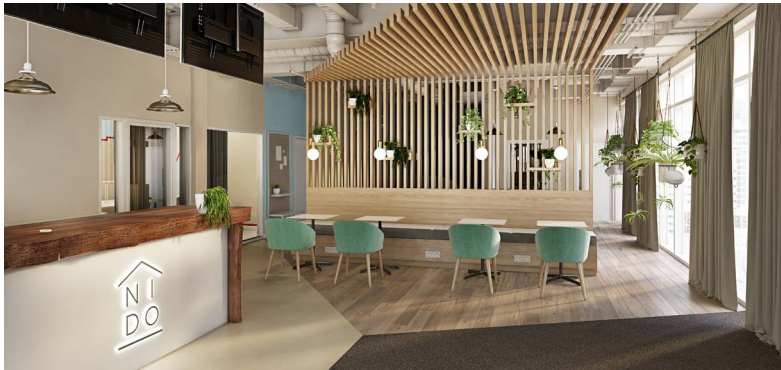
UK

Nido acquired new-builds in Coventry, Walthamstow and Wembley this year. We worked to ensure the design, differentiation and market positioning were as centred around the character of the areas as possible. Each building is truly unique, from tabletops made from recycled yoghurt pots to dedicated Zen spaces.



IRELAND

Nido successfully opened its Cork flagship residence. Ireland's PBSA market is unique with a focus on localism and parents being decision makers. We adapted our service and offering, including the layout of the building centred around a landscaped courtyard, shorter term lengths and promotions to react to the challenging market this year.



GERMANY

Nido now has 1,709 beds in Germany following the acquisition of a national operational portfolio and an additional asset in Dresden. The portfolio has been transformed through refurbishment, new facilities, and a full virtual events programme — the first of its kind in this market. We diversified our offering in terms of the room types and contact lengths and even audience as we look to attract the 'young professional' market as well as students. This portfolio has been really challenging but hugely satisfying as we push through some of the great spaces and features above on a more limited budget.



New types of spaces like TED talk areas, gaming rooms and projectors in reception spaces

PBSA FEATURES

Technology is evolving faster than ever, students are tech-savvy and a generation of digital natives who quickly adapt to shifts in the way technology is used and consumed. A key focus is the integration of tech within the fabric of our buildings to better enable our communities to live, study and interact.

Features like built in LED lighting and speaker systems controlled via voice or apps allow students to personalise and adapt spaces for a variety of uses or moods. New types of spaces like TED talk areas, gaming rooms and projectors in reception spaces provide new forms of tech integration. We've partnered with Technogym to shake up our gym areas and introduce some of the most high-tech gym equipment on the market.



PRINT TO DIGITAL

From print to digital, we always make sure that our brand and tone of voice is consistent throughout.

The Nido brand has come a long way over the past couple of years, so we're very excited to showcase our brand-new approach from our use of colours to fonts to imagery. We hope that this really sets us apart from the competition and shows our customers visually who we are as a brand.

We have also reduced the amount of print collateral that goes out to ensure that we're acting on our sustainability focus as a brand as much as possible. So we've adjusted our approach slightly so that we're producing the same amount of branded collateral but acting in a much smarter and efficient way. To adapt to the 'new normal' we'll also be utilising our digital channels and using QR codes a lot more to ensure our students are getting all the information they need, but in the safest way possible.



Did you know... Out of the 17 billion cubic feet of trees deforested each year, over 60% are used to make paper. This deforestation is responsible for nearly a fifth of the world's annual greenhouse gas emissions.

NEW WEBSITE

A brand that advocates technology needs a state of the art website. With our rebrand and chosen values, our former website no longer depicted who we really are as a brand, and what we truly believe in, so, it was time for a refresh.

Over the past 12-18 months, we've been working night and day on our new website.

The website will have a number of features truly setting it apart from the rest from individual floor plans so you can see the layout of your potential room prior to booking; to price sliders so that you can find a room that matches your budget; to our Instagram account live feeding directly into our socials page meaning everyone can see all the exciting things we're getting up to whilst students are making their decision to stay with us.

Our new website also allows us to continuously develop, improve and adapt, meaning we're forever with the times when it comes to website development. With a tech savvy audience such as ours, this is vitally important, as we know a student values the consumer experience when browsing for their new home from home.

Finally, its because we're launching more than one website. We're not just a big fish in a small pond anymore. When we started off, we were just one building in North West London... well, not anymore, now we're operating in Germany, The Netherlands, Ireland, the UK and some exciting new places coming very soon. Each of these locations need their own websites in order to personalise the booking process experience, and ensure that our students love us from the minute they first lay eyes on us.

Why not keep an eye on our social platforms for the exciting announcement of our new website launch? You can find our social handles on the last page of this report.

<CODE> YOUR FUTURE

CodeYourFuture (CYF) is a UK based non-profit organisation that trains refugees and other disadvantaged people to become web developers and helps them to find work in the tech industry.

CYF students are trained in full-stack web development by professional volunteer developers from the industry, putting a strong emphasis on collaboration and product development through tech projects.

CYF graduates work in companies like FT, BBC, STV, Ticketmaster and startups like Adzuna, Sensible Object, tlr and WeGotPop.



This money has enabled Code Your Future to continue their excellent work both in supporting volunteers and students involved with the current class as well as preparing and planning for a new cohort of 30



NIDO

2.0

At Nido, we don't believe in standing still. Our eyes are on the future, of the planet and it's people. We know that those who live and work with us will shape tomorrow and make the world kinder, more sustainable, healthier and smarter. We want to focus on them, which will in turn enable our business to grow and deliver experiences for our students they won't easily forget.

Our **Nido 2.0** Strategy allows us to pivot, review and create new processes to communicate more efficiently with our students, grow as a team and business, and learn throughout the process. We don't have a crystal ball or a magic wand but change is in the pipeline and we're excited to tell you about it.

Our activity focuses on three pillars;
Resilience, Bravery, and Reform.

WHAT WE'RE IMPLEMENTING NOW

The first stage of **Nido 2.0** focuses on us adapting to the new world we live in. Nobody has a manual on how to handle COVID-19 and we've evolved to keep up with the needs of our customers including:

- Digitising all of our communications
- Activating agile marketing initiatives to be visible in the right places to our audiences
- Adjusting our tone of voice to be honest, authentic and transparent. We know that people want to hear facts and details about how we can support them, not fluff
- Increasing our support to our charity and community led partners
- Making all our events virtual, which allows friends, family, and partners to join the Nido fun and community.

LET'S STAY SAFE

What to do if you're experiencing COVID-19 symptoms



LOOK OUT FOR THESE SYMPTOMS



A HIGH TEMPERATURE

This means you feel hot to touch on your chest or back (you do not need to measure your temperature)



A NEW, CONTINUOUS COUGH

This means coughing a lot for more than an hour, or 3 or more coughing episodes in 24 hours (if you usually have a cough, it may be worse than usual)



A LOSS OR CHANGE TO YOUR SENSE OF SMELL OR TASTE

This means you've noticed you cannot smell or taste anything, or things smell or taste different to normal

IF YOU HAVE ANY OF THE MAIN SYMPTOMS OF CORONAVIRUS TAKE THE BELOW ACTIONS:



GET A TEST TO CHECK IF YOU HAVE CORONAVIRUS AS SOON AS POSSIBLE.



STAY AT HOME AND DO NOT HAVE VISITORS UNTIL YOU GET YOUR TEST RESULT - ONLY LEAVE YOUR HOME TO HAVE A TEST.



ANYONE YOU LIVE WITH, AND ANYONE IN YOUR SUPPORT BUBBLE, MUST ALSO STAY AT HOME UNTIL YOU GET YOUR RESULT.

Please alert a member of our team as soon as possible if you have received a positive test, so we can best support you.

WHAT WE'RE IMPLEMENTING NEXT

As we move into the next phase of **Nido 2.0, change will continue. We constantly stop, evaluate and adjust as we continue to roll out our Nido 2.0 plan.**

The next phase of our Bravery and Reform pillars is very exciting, here's what you can expect:

- We will be more research and insight led.
- We are launching new and improved listening tools, allowing you to share your voice with us. We will use this information to inform future decisions.
- We are revisiting our product offering to ensure it remains relevant to our customers and offer products that meet the wants of our students.
- As part of our on-going digital strategy, we will be reviewing our digital platforms and looking at new ones to make accessing your Nido and information about Nido much easier.
- Wellbeing will be our focus, we will continue to invest in and implement new wellbeing initiatives to support our community. We will live and stand by this value across everything we do.



This is the start of the list and we will continue to add to it as we move forward and adapt to the 'new normal'. If there is something you'd like to see here that isn't, we're all ears.

Drop us a line at marketing@nidostudent.com.



CONTACT US

If you have any further questions about our Insights Report, or if you even just want to know a little more about Nido Student, you can contact us on the below:

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