

Roommate DP Ecosystem



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REPORT #3
DSO 556
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Roommate DP Ecosystem

The Roommate DP Ecosystem is a niche ecosystem within the larger Real Estate Ecosystem. There are various different players including social networking platforms, real estate platforms, and roommate matching platforms that provide value to consumers in different ways including a large audience on social networking platforms, the ability to find both roommates and places to live in real estate platforms, and more security and focus on niches in roommate matching platforms.

Key Strategic Moves

Big players: Big players have capitalized on the utilization of large user bases, offering powerful platform design, platform envelopment, and taking advantage of brand recognition to gain market share.

Minion players: Minion players take advantage of being able to target niche audiences, enhanced filtering and customization, and the ability to integrate technological innovations in order to increase market share for their platform.

Proposed Strategic Moves

Big players: Strategic moves that big players could implement include digitizing the roommate experience, leveraging historical data collected, enhancing user trust and taking steps to improve safety, and entering niche ecosystems through partnerships.

Minion players: Considerations minion players should take for increased success are creating apps for users to access the platforms, providing a quicker onboarding process, notifications that provide value to users, and the ability for users to connect to mutual friends.

01

Roommate DP Ecosystem Overview



Roommate DP Ecosystem

The roommate digital platform ecosystem is an ever-growing niche ecosystem within the greater real estate ecosystem. In the past, individuals have relied on personal connections to find roommates but, the emergence of digital platforms have made finding roommates much simpler and helps to expand an individual's network of potential roommates. This capability is important because individuals move an average of 12 times in their lives and half of US citizens live with non-romantic or non-dependent (under the age of 18) roommates so, a majority of US citizens will have to find at least one roommate in their lifetime.

The ecosystem has a wide range of players including social networking platforms, real estate platforms, and dedicated roommate platforms. Not all of these platforms have dedicated roommate matching capabilities but their platform enables individuals to advertise or search for potential roommates through their current capabilities.

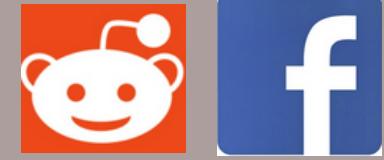


Ecosystem Map

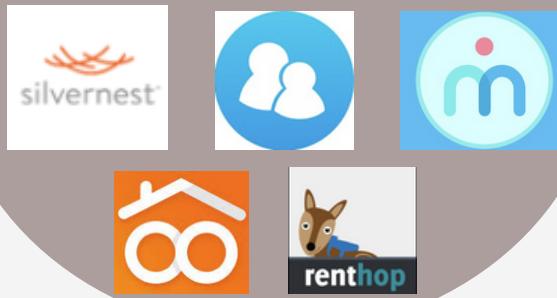
Real
Estate
Ecosystem

Roommate DP
Ecosystem

Social
Networking Platforms



Roommate
Matching Platforms



Dominant Players

Dominant players carry a large market share and revenue due to less focus on niche solutions.

These players have been around for a while, have a sizable revenue stream, and have advantages that allow them to own a large portion of the market share. Some of the players are not roommate matching platforms (Zillow and Apartments.com) or even within the real estate ecosystem at all (Facebook and Reddit) and may even lack specific roommate matching capabilities but their large user base generates roommate matching capabilities effectively. Other players carry advantages like owning the domain name which helps gain market share effortlessly (Roommates.com).

Examples: Facebook, Reddit, Zillow, Apartments.com, Roommates.com

Minion Players

Minions have lower market share but are specifically dedicated to roommate matching and offering niche solutions.

These players are newer to the market that focus entirely on roommate matching services and some offer roommate solutions for niche groups (RoomSurf and Silvernest). They do not necessarily carry inherent advantages of having large user bases due to other platform offerings or owning key domain names but they offer value to consumers because of their sharp focus on successful roommate matching. Similarly, some platforms find success because they bridge the gap between the larger real estate ecosystem and the roommate DP ecosystem (Roommatch).

Examples: RoomSurf, Roommatch, RentHop, Silvernest

Types of Players and Their Roles

Social Networking Platforms

Social Networking platforms, like Facebook and Reddit, do not offer specific roommate matching capabilities but the nature of social networking creates spaces for potential roommates to connect like Facebook groups or subreddits dedicated to finding housing or roommates. Many social networking sites have a large user base and greatly expands the potential roommate network which is why they are successful for roommate matching.

Real Estate & Rental Platforms

Real Estate and Rental Platforms, like Zillow and Apartments.com, do not offer specific roommate matching capabilities but allow for landlords or property owners to post apartment or rental listings. These listings can include co-living spaces or openings for rooms which allows potential roommates to find both a place to live and roommates to live with all on one platform.

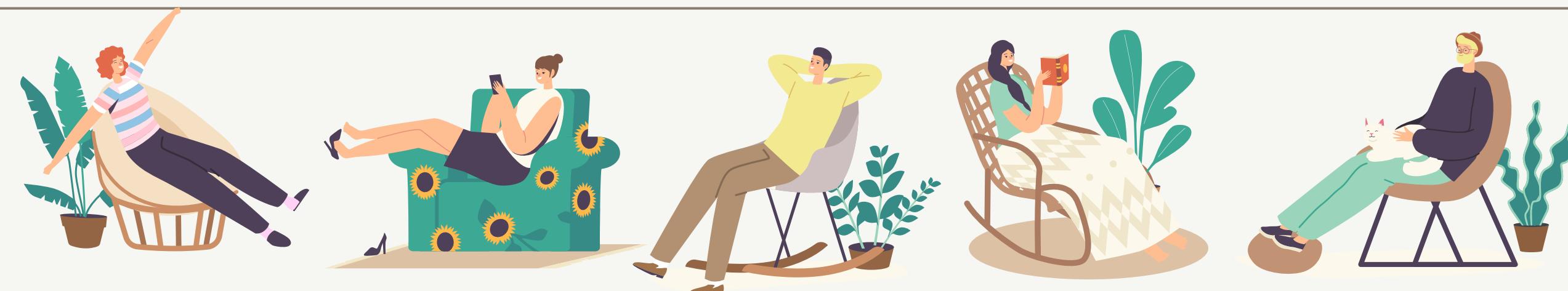
Roommate Matching Platforms

Roommate Matching Platforms offer roommate matching capabilities and sometimes focus on specific niches within roommate matching like silvernest which focuses on senior homesharing or RoomSurf which focuses on college students. These platforms generally offer more emphasis on security like verifying identities and focuses on finding successful roommate matches.

Types of Players and Their Core Interactions

Social Networking Platforms

In Social Networking platforms, the core interactions are between two consumers. One person would post their need for a roommate to the platform and another roommate would view and reply to the post themselves.



Real Estate & Rental Platforms

Real Estate and Rental platform core interactions are between leasing companies or property owners/managers and a consumer. The leasing company or property owner/manager posts their open space and consumers view and apply to live in that space.

Roommate Matching Platforms

Roommate Matching Platforms facilitate interactions between two consumers. Each consumer creates a profile on the platform and browses other profiles. Consumers then communicate with each other if they believe they are a good fit.

Ecosystem Health

As housing costs increase and people continue to rely on roommates to afford housing, many consumers turn to digital platform to identify potential roommates. Because of this, the Roommate DP ecosystem continues to grow and thrive.

Productivity

The apartment rental market in the US in 2021 was approximately \$193.9 billion and with nearly half of US citizens living with non-romantic and non-dependent roommates, there is a huge market for roommate matching services. The apartment rental industry has grown nearly 3% in the past 5 years and is continuing to grow so the demand for roommate matching services will only increase.

Robustness

With social networking platforms, real estate platforms, and domain name owning platforms holding the majority of the market share for the ecosystem, platforms focused on roommate matching must either offer shared value with the larger real estate ecosystem or meet a niche market's demand in order to thrive.

There are many platforms that have accomplished this, but the survival rate is still low for platforms that fail to stand out or create successful roommate matches.

Niche Creation

There is a multitude of potential niche markets for roommate matching platforms as people identify with various demographics that they may want to have in common with a roommate. Already in the ecosystem are platforms for seniors and college students, to name a few. But, there are endless opportunities for future niches, especially as society continues to evolve.

02

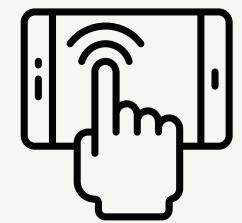
Key Strategic Moves Taken by Dominant Players & Minions



Dominant Players



Captured Value from Large User Bases



Enhanced Platform Design from User Experience and Product Oriented Cultures



Platform Envelopment



Creating Strong Brand Recognition

Captured Value from Large User Bases

Examples

Facebook's Platform

- Early example of network effect success, with massive reach of users
- Prioritize focus on new products that keep users engaged on the platform
- By setting up groups that allow individuals to directly find roommates on their own, Facebook acts as an adjacent platform that continues to drive value from these users through ads.

Explanation

The large players have advantages from being some of the first movers in their own ecosystems and can utilize their network effects to transition their large active user-based to the roommate ecosystem.

Assessment

The success of any platform ecosystem relies on the ability to create a wide interconnected network of users. Within the roommate ecosystem, a key challenge becomes maintaining the users within the site, as once roommates are matched, they can quickly leave, preventing a platform from maintaining value. These social media sites and real estate players overlap with the roommates ecosystem, allowing them to absorb its functions and capture new value. Each of our large players' unique strategies for driving users to their site has created a massive competitive advantage and creates opportunities for this roommate ecosystem as well as for many others.

Enhanced Platform Design from User Experience and Product Oriented Cultures

Examples

Appartments.com:

- UI instantly connects users to hundreds of apartments with all needed information
- For the user, Apartments.com creates clear value as you can easily find your next, verified apartment
- As a property owner, you get access to a wide range of potential customers to improve occupancy

Explanation

Despite overlapping user bases from a large suite of various competitors, each platform offers a unique set of services and key core platform interactions that focus on delivering the best product generating a strong value proposition for each participant.

Assessment

An enhanced platform design that can connect potential roommates with easy-to-use tools and functions can deliver a stress-free experience. By offering structure, organization, and many filters, users will quickly navigate through options that meet their own criteria. Although many of these companies don't offer a specific roommate product, their existing innovations and tools give users the ability to repurpose the core interaction to meet their roommate search. A product-oriented, customer-focused culture has become an integral part of the success of any platform ecosystem, and the companies that champion this approach are often rewarded with the most dedicated users.

Platform Envelopment

Examples

Facebook Roommate Groups:

- By creating the group functionality, strangers could comfortably connect by seeing mutual friends
- Users on the platform created dedicated housing groups and would leverage these groups as ways of finding roommates

Reddit Roommate Subreddits Groups:

- Roommate subreddits align with the company's core goals without the need to design a dedicated business strategy.

Explanation

By observing activities from other platforms, these large players identified an overlapping user base to capture entirely new value for their own platform.

Assessment

These large player platforms have become the leading example of the success that platform envelopment has on increasing the value of an underlying platform. By designing a robust, adaptable business model and giving the users freedom to repurpose the platform, these large players can easily navigate between different niche ecosystems and service overlapping user bases. This creates a growing cycle that starts with users being attracted to the niche before eventually becoming integrated into the original platform's core ecosystem. Although most of these companies' core function isn't in the roommate ecosystem, a multifunctional platform creates opportunities where they can offer adjacent tools to absorb the user value.

Creating Strong Brand Recognition

Examples

Apartments.com Renter-verse:

- By establishing this one-stop-shop users can quickly begin to associate renting with Apartments.com which will naturally attract new users as they begin looking to rent

Roommates.com Domain Address:

- One of the key competitive advantages for roommates.com comes from owning the best domain name for searching for a roommate, lowering customer acquisition costs and offers free marketing

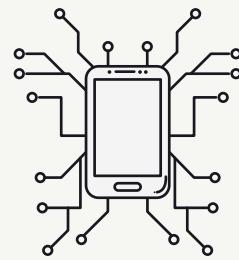
Explanation

Each of these large players have become the most recognizable brands within their own ecosystems: social media (Facebook/Reddit), real estate (Zillow/Apartments.com), and roommate-specific (Roommate.com). This branding creates a reliable reputation that keeps users constantly returning to the platform.

Assessment

While first-movers have the advantage of innovating and creating an ecosystem, it is generally the companies with the strongest brands that remain as the large players. Outside of potentially roommates.com, the roommate ecosystem lacks a defining brand, opening opportunities for adjacent large players to absorb this niche of the platform. By establishing their brands in a larger ecosystem, these companies have the initial reputation that will attract users leading to value creation as they enter different niche markets.

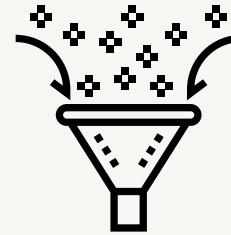
Minions



Integrated Technology Innovations



Target Niche Audiences



Filters and Customization



Broad High-Quality Platform Design for
Enhanced User Experience

Integrated Technology Innovations

Examples

Roommatch's integrated widget

- Specialized widget that allows consumers who are looking at housing options to be instantly directed to Roommatch in order to find a roommate as well
- Acts as a defensibility mechanism as it is patented by Roommatch

Explanation

Platforms must make strategic moves in order to differentiate themselves from the other platforms. Having technology integrations that are unique to each platform will set them apart from the other players and create a differentiating environment where they can excel among the competition.

Assessment

By offering integrated technologies within each platform, there has to be thought put into the short term as well as long term attractions to the platform. Thinking of long-term differentiations builds a moat around each platform's business model and places them in a competitive position. A short-term integration also offers defense in a high pain point period of time in order for a platform to stay afloat. Roommatch developed a widget that can be implemented on various real estate platforms. While searching for an ideal living space, many are discouraged due to the lack of a roommate. However, this widget allows customers to be directly connected to the Roommatch platform and find someone who has the same preferences in a living space.

Target Niche Audiences

Examples

Roomsurf

- A roommate matching platform specifically designed for college students

Silvernest

- A roommate matching platform that targets the senior home-sharing market and targets baby boomers and empty nesters

Explanation

Smaller platforms often focus on a niche customer segment. This specific segmentation differentiates the platform from the other platforms, small and large, by catering to a specific audience's needs.

Assessment

Each of these platforms has identified a niche target audience and provided a holistic solution for the needs of their consumers. In the case of Roomsurf, it provides a viable platform for college students to find each other and take out the discomfort of not knowing who is going to be your residence hall roommate would be. It takes the power out of the college roommate assignment system and leaves it in the hands of the students. They have deployed a viable application that is both desktop and mobile-friendly for this younger generation and has met the needs of college students. In the case of Silvernest, they have targeted baby boomers who are looking for a way to supplement more income without going into their savings as well as housing new empty nesters. This platform allows for a baby boomer to not be alone, and have company while gaining income as well as empty nesters to not be homeless and still feel "at home" in their new environments. The Silvernest platform also allows for consumers to "meet" online versus just messaging, again a need that is met for pairing baby boomers with empty nesters. The reason that this "meeting" option is not needed for Roomsurf is that college students are similar in age and have compatible interests. Again, each of these platforms has identified a niche target audience, deployed a solution for that audience, and in the end still contribute to the roommate matching ecosystem in their own unique ways.

Filters and Customization

Examples

Roommatch:

- Large amounts of filters that can include general information to specific personality type questions
- Allows for the users to quickly and easily search through people that align with their interests

Explanation

Smaller platforms must uniquely customize their filters in order to quickly find the most qualified matches for their uses. If a consumer is thrown into a sea of roommates, they will most likely feel overwhelmed and it will take more time to find a roommate and achieve success within the platform.

Assessment

The strategy of unique filters and customization is a fighting mechanism from the minions to the larger players. Allowing a unique customer experience for each consumer, making them feel like each of their needs are met, is an extremely important win for the minions. The way that Roommatch has implemented their filters is a perfect balance of not too many and not too little. Each of these filters has been well thought out and executed, allowing for a consumer to reach their goal of finding the most compatible living solution and roommate.

Roommatch also offers a custom “match” rate that displays the probability of a good match between roommates. This match ratch is custom for every user that uses the platform and is unique to Roommatch.

Broad High-Quality Platform Design for Enhanced User Experience

Explanation

Creating a platform that has a simple and engaging interface for all targeted audiences. A platform with well-thought-out and flushed-out ideas will create a positive user experience by helping users achieve their goals in the most efficient manner.

Examples

RentHoop

- This application is meant for college students off-campus living; however, it also offers a page for college administrators to use as their official housing system.
- Mobile-friendly site
- Dealbreaker features
- Swipe Model

Assessment

This unique swiping approach allows for users with short attention spans to have a fun interactive experience while searching for a roommate. Renthoop also utilizes features such as current location, mutual Facebook friends, work history as well as common interests. This allows users to use a basic and navigable app while completing their ultimate goal of finding a roommate.



03

Proposed Strategic Moves for Dominant Players & Minions

Proposed Strategic Moves: Dominant Players

- Digitization of the Experience
- Leveraging Data Stores for Improved Matching
- Enhance User Trust and Safety Initiatives
- Developing Partner Relationships to Join Niche Ecosystem



Digitization of the Experience

The innovation of new technologies and the interconnectedness over the web opens the opportunity to digitize the roommate experience and transform online relationships into lasting friendships.

Why?

One of the challenges of maintaining value from users is that once roommates are found, there is little incentive to return to the platform. By digitizing the experience and the creation of more online relationships, users will continuously return to the platform by maintaining connections and offering new data streams. This creates new value streams that can become enticing for these companies as they begin to innovate the ecosystem and develop more robust business models.

How?

Facebook, Roblox, Niantic, and many other platforms have introduced the idea of the metaverse, a virtual 3D environment.

The metaverse concept allows for new opportunities in the roommate ecosystem. Users can begin adding digital roommates that can become the basis for real-life relationships and allows users the ability to see lifestyle compatibility. Instead of the roommate search becoming reactive, the metaverse creates a proactive experience, where roommate matches are decided long before they are needed. Other digitization strategies can revolve around creating profiles and uploading lifestyle content that gives a glimpse into someone's personality.

Leveraging Data Stores for Improved Matching

Why?

Larger players' key points of differentiation from the smaller players are their overall size and ability to collect copious amounts of data on their users. If the larger players can utilize this competitive advantage in developing data-driven tools, it will leave the smaller players to be infeasible. Larger players will maintain a clear advantage over smaller players, and offer an improved experience to potential new users. Since many of these larger players exist in overlapping ecosystems, the strategic use of this data can help them reposition their approach in capturing value in the roommate ecosystem.

Tactical use of the data can have these large players using their platforms to continuously test and improve features leading to a better user experience. Strategic use of the data involves determining how users are gaining value from the platform in order to develop new services to capture these opportunities and retain the users within the platform ecosystem.

How?

Tactical Use: Similar to dating platforms, compatibility is key to a positive co-living experience. If the large players can lead the market in their recommended roommates, then they will attract a larger user base. A recommendation system could be developed using a combination of their existing user base and data stores. With such a substantial pool of candidates, the system would be able to be very specific in matching people together based on attributes and preferences that would improve the overall user experience.

Strategic Use: Real Estate companies have the advantage of determining the trends of the renters market prior to when other companies may be able to pick up on such trends. Using this data, these companies can determine occupancy needs and leverage relationships with adjacent roommate platforms as a way to begin supplying solutions to these issues. This can occur prior to when roommate-specific platforms may be able to react, allowing these companies to capture new potential revenue streams alongside their core business model.

Enhance User Trust and Safety Initiatives

Why?

There are high levels of uncertainty when looking for roommates online that discourage many users, as they opt to simply ask friends because it is viewed as a safer option. By eliminating some of the fears that come from roommate matching, through improved user safety initiatives, users are more likely to leave with a positive experience. These eliminations and initiatives subsequently improves the reputation of the platform. Additionally, new data privacy laws have led to many users taking more ownership of their data and what is seen by the public.

The digitization of the roommate experience brings new threats and challenges from potential bad actors. Combined with existing safety concerns in finding random roommates, the dominant players will need to develop customer empathy. This will allow larger players to build the reputation of the platform that demonstrates prioritizing the user's best interests at heart.

How?

Safety initiatives would have to be put in place to act as a filter for fraudulent postings. Many of these large players already have software that can detect spam accounts. Building off these applications, players can create a vetting system that ensures the roommate posting is in fact real and has good intentions. Once determined to be a real person genuinely looking for an apartment, the next risk is the lack of information provided outside of the first-person perspective. An additional feature could be added that would allow the user to search for any connections to the possible candidate. This then creates a quick survey that can be sent to the mutual connection, evaluating the candidate. Based on the responses, a recommendation score would be returned giving the person searching a tangible metric to base their decision off of. Finally, transparency in how data is used, collected, and verified will give users an extra sense of trust as they continuously use the platform.

Developing Partner Relationships to Join Niche Ecosystem

Why?

A partnership between a large player and a smaller roommate-specific platform presents the quickest path to success and large-scale use. Large players do not currently have any in-house developed roommate finding tools, but do have the data and larger user bases. The smaller players have the industry knowledge, UI & UX, and backend relationships within real estate companies. However, the smaller players lack the exposure and existing users. A partnership between the two can leverage the core strengths of each platform, and elevate the ecosystem as a whole.

Many of these large platforms currently exist in an overlapping market with a shared set of users. This makes a transition to the roommate space both an opportunity to capture more value and a threat to the existing core functions for these large platforms. Partner relationships with smaller, roommate-specific platform players can create a mutually beneficial experience that strengthens the overall niche ecosystem.

How?

By having the advantages of network effects, these large players can easily leverage their user bases to attract new partners dedicated to the roommate ecosystem. These partnerships would give the large platforms the ability to focus on other platform envelopment moves while finding a strategic new way to directly capture value. This integration can be as simple as logging in, using a pre-existing profile when using this roommate app or offering rental property partners an option to quickly fill occupancy. These partnerships will greatly enhance the experience for the users and can offer the adjacent platforms a foothold in this ecosystem. Another opportunity is through a merger and acquisition strategy of the smaller players, as they can directly enter this roommate landscape without having to integrate their own platform into a more niche ecosystem.

A photograph of a modern bedroom. A double bed with white linens is positioned against a light-colored wall. To the left of the bed is a small wooden nightstand holding a small potted tree and a vase with pink flowers. To the right stands a tall, tripod-style floor lamp with a wide, light-colored shade. The floor is made of light-colored wood planks. Sunlight streams in from a window on the far left, casting long shadows across the room.

Proposed Strategic Moves: Minions

- App Creation
- Quicker onBoarding Process
- Savvy Notifications
- Connection to Mutual Friends

App Creation

Why?

With this generation and the niche target audiences that these platforms are targeting, a mobile app is essential. Most users are on the go and would like the ease of searching for a roommate at any time and anywhere. Our phones are constantly on us, and for quicker and easier access a mobile application is ideal.

Some of the platforms lack mobile applications. This becomes a quick disadvantage when adhering to consumer needs.

How?

The mobile application can be built and deployed on the app store. Using different integrations that have a similar user interface as that for the website.

Quicker onBoarding Process

Platforms should present a simple and quick onBoarding Process to secure a new customer. Rather than providing a lengthy questionnaire with an in-depth interrogation, consumers can finish their profile after onboarding.

Why?

Although a longer onBoarding process thoroughly demonstrates to users the app's benefits, educates them about the functions, and gathers profile information to deliver personalized content and notifications, if the process is too long, users will lose attention and potentially refrain from using the platform. Creating a quick onBoarding process will keep users engaged and facilitate a positive user experience.

How?

Platforms can create an onboarding experience that consists of the few most important questions to keep the process quick yet efficient. After onboarding, users should have the option to finish completing their profile. In order to complete their profile, there will be more in-depth questions such as budget, personality type, and social preferences. Therefore, users will instantly sign up for the platform and will fill in their specific preferences in order to find a roommate quickly and effectively.

Savvy Notifications

Why?

Users may not be on the platform 24/7 and could potentially miss out on an opportunity for finding a roommate. As housing is an important and time-sensitive issue, there needs to be a notifications system in place that adheres to consumers' sense of urgency.

Platforms should allow users to have filtered notifications that are built to help them succeed in their goal of finding a roommate.

How?

Text notifications and push notifications would be useful to users who are interested in meeting their housing needs as soon as possible. More traditional notifications such as email and in-app notifications should be an option for people who are not in a hurry to find a roommate.

Connection to Mutual Friends

Why?

Users may prefer living with someone within their social network. For some, living with a mutual friend is a priority. Therefore, it is important to offer a feature where users can explore roommates based on their social network. This will allow users to feel more comfortable in finding connections.

Displaying users' mutual friends will increase the likelihood of finding an ideal roommate.

How?

Social media should be integrated within each platform to display users' followers, connections, and mutual friends. This way, users can feel comfortable and find a roommate within their social network.

Integrated Summary



Ecosystem Future

The roommate dp ecosystem's future will be primarily made up of a race between the large and small players. The large players will begin to develop a centralized roommate finding service that leverages their existing userbase and data stores. The small players will continue innovating their platform and developing new features. Their goal is to continually capture new customers through the enhancement of their user experience.

Ecosystem Sustainability

The digitization of the roommate dp ecosystem presents a plethora of new dangers such as safety and data privacy. Existing threats in the trust in finding a roommate can suddenly become amplified with unknown digital personas that can misrepresent users. These risks must be mitigated through constant innovation and dedicated User Trust & Safety initiatives in order to build towards the success of the ecosystem.

Ecosystem Future



Dominant Players

The primary path to finding a roommate online is unstructured and sparse in today's ecosystem. The large existing platforms like Facebook and Reddit are positioned to develop a centralized roommate finding network that connects their existing user bases. Through this innovation, a new set of capabilities and features could be developed on the foundation of the massive stores of data. It also enables them to become first movers in the digital roommate space melding their influence on the real and digital worlds.

Minion Players

The minion side of the ecosystem's foremost strategic initiative is the capture of new users on both sides of their platforms. Adding features and tools that remove friction from the user signup and core functions will persuade users onto their platform. Improving accessibility by creating more points of access, like mobile apps, will be necessary for maximizing the conversion of potential customers. Minion players will begin to integrate existing social networks bettering the quality of interactions between customers.

Roommate Ecosystem Future

In the near future, we will see a few niche players succeed while the majority shut down. The major players will take notice and either acquire one or build their own in-house. This will start the race towards defining who will be the go-to source for all roommate finding. As the world digitizes, players that crossover in both spaces will launch the digital roommate space.



Ecosystem Sustainability

The Roommate Ecosystem will best thrive by determining how to best approach users' trust and safety



- Users' primary path to finding roommates are filled with concerns centered around compatibility and trust
- Growing digital trends brings new threats that makes it difficult to identify potential bad actors
- Trust & Safety Initiatives centered around profile moderation and privacy can establish trust in the relationship between users and platforms
- Prioritizing user match safety and ensuring data privacy will create long-term sustainability that will maintain value creation for the ecosystem



Thank You !

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