

deskmag

FIRST RESULTS OF THE

2017 Global Coworking Survey

BRUSSELS, NOVEMBER 28, 2016

— COWORKING EUROPE CONFERENCE —

IN COLLABORATION WITH

S()CIAL
WORKPLACES.com

THE INDEPENDENT ANALYSIS OF THE SURVEY IS SUPPORTED BY

NEXUDUS

essensys

communitas^{co}

NUMBER OF COWORKING SPACES WORLDWIDE

AS OF OCTOBER 31, EACH YEAR



*PROJECTION – ALL 2016/17 RESULTS ARE :FIRST RESULTS - ALL OTHER YEARS ARE BASED ON FINAL RESULTS

IN COLLABORATION WITH

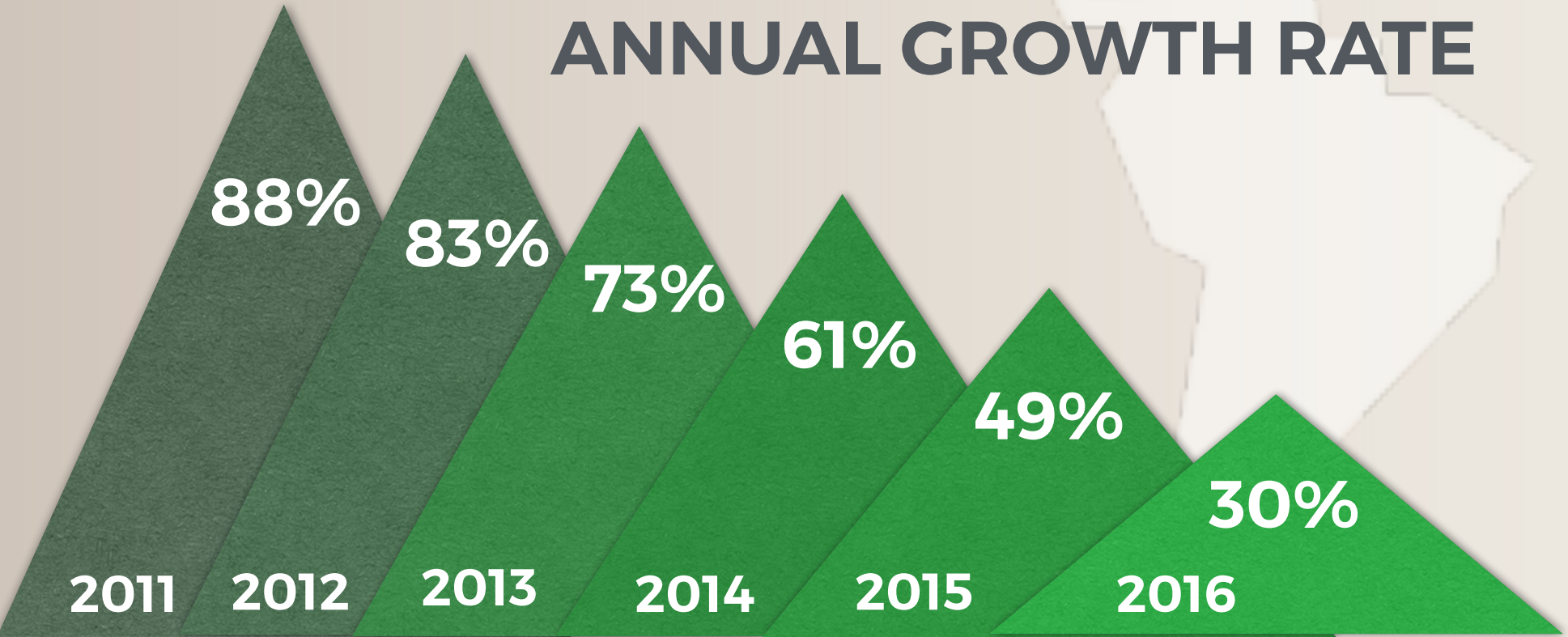
S()CIAL
WORKPLACES.com

NUMBER OF COWORKING SPACES WORLDWIDE

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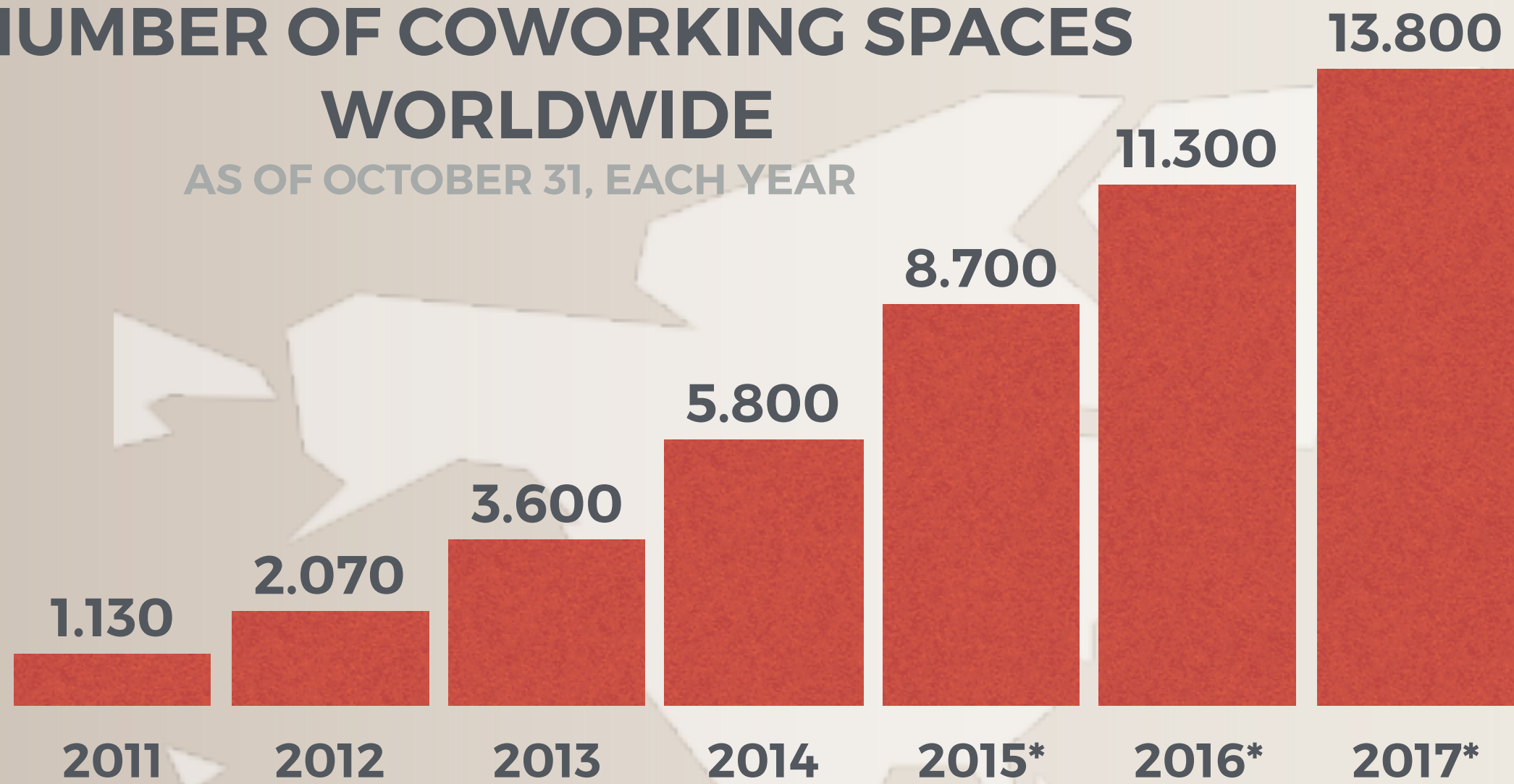
ANNUAL GROWTH RATE



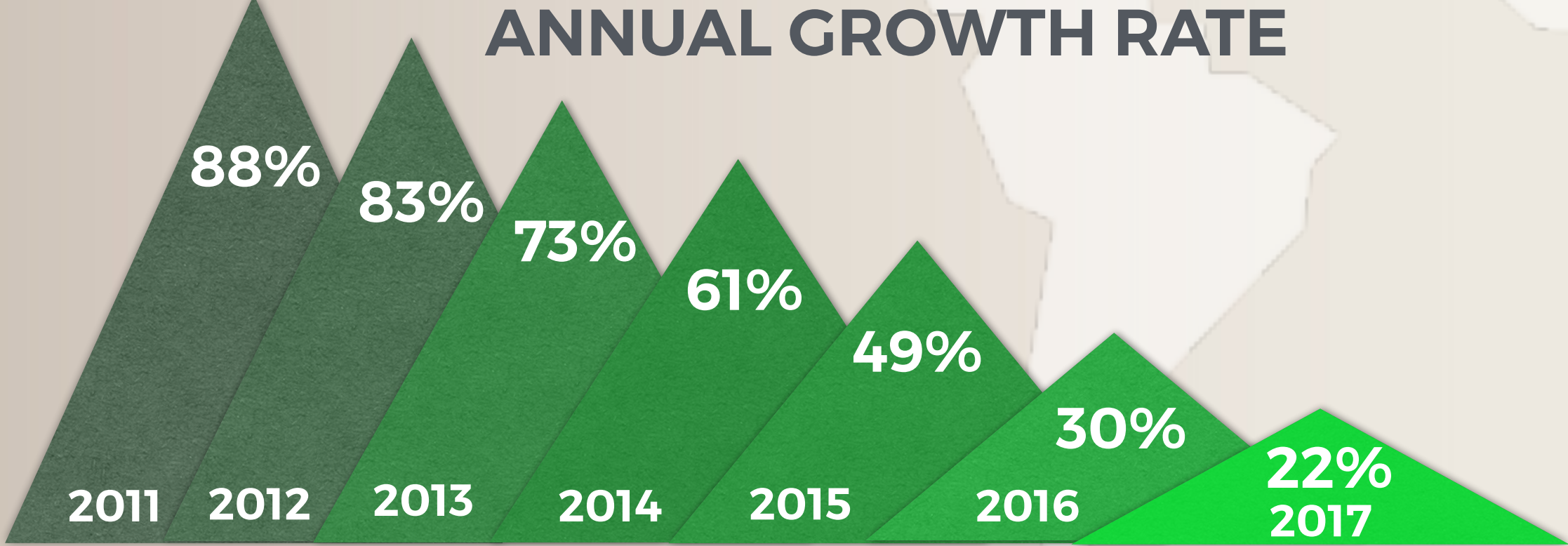
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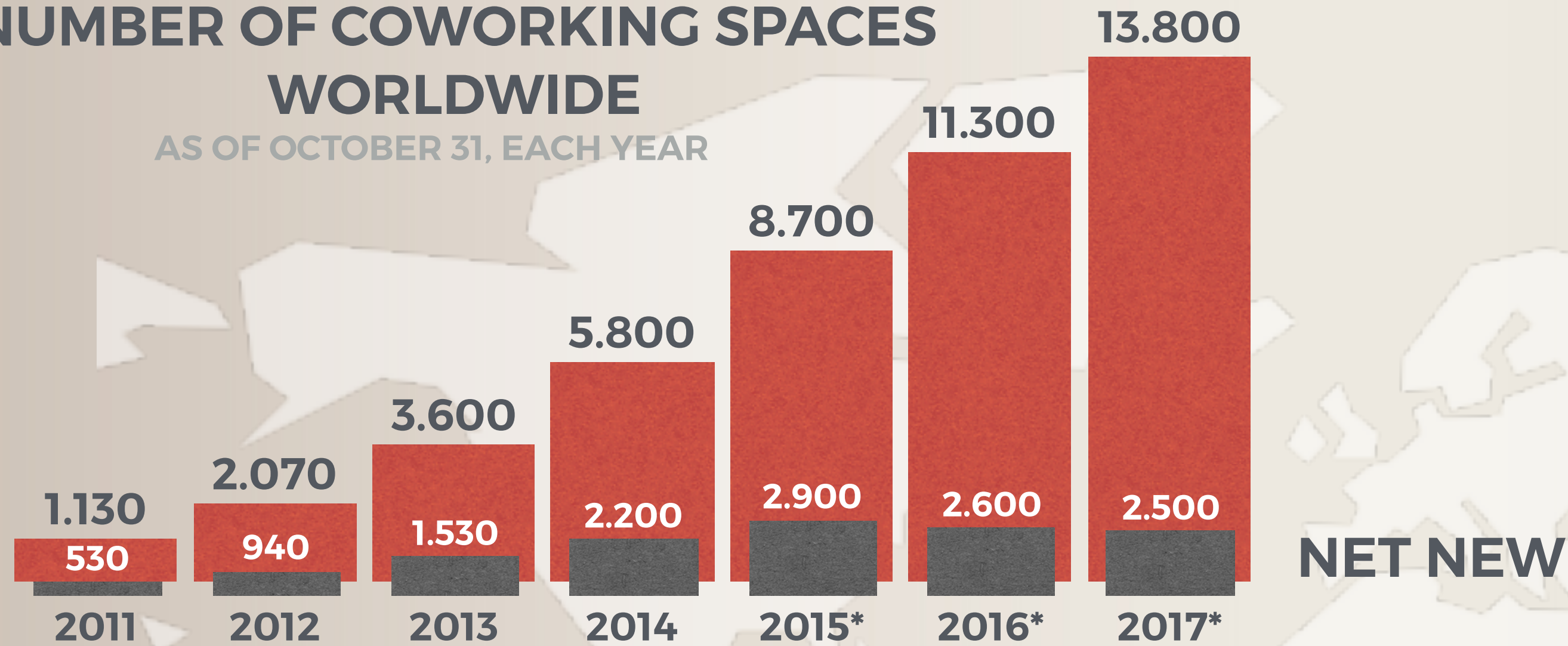
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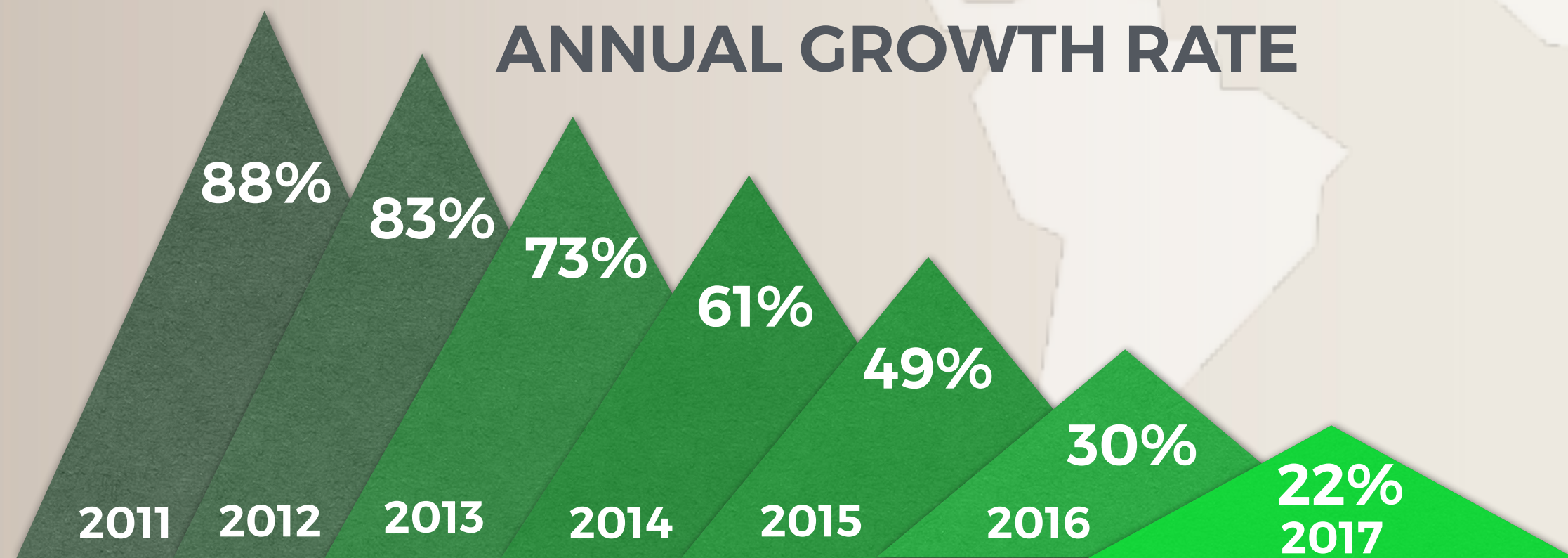
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NET NEW

ANNUAL GROWTH RATE



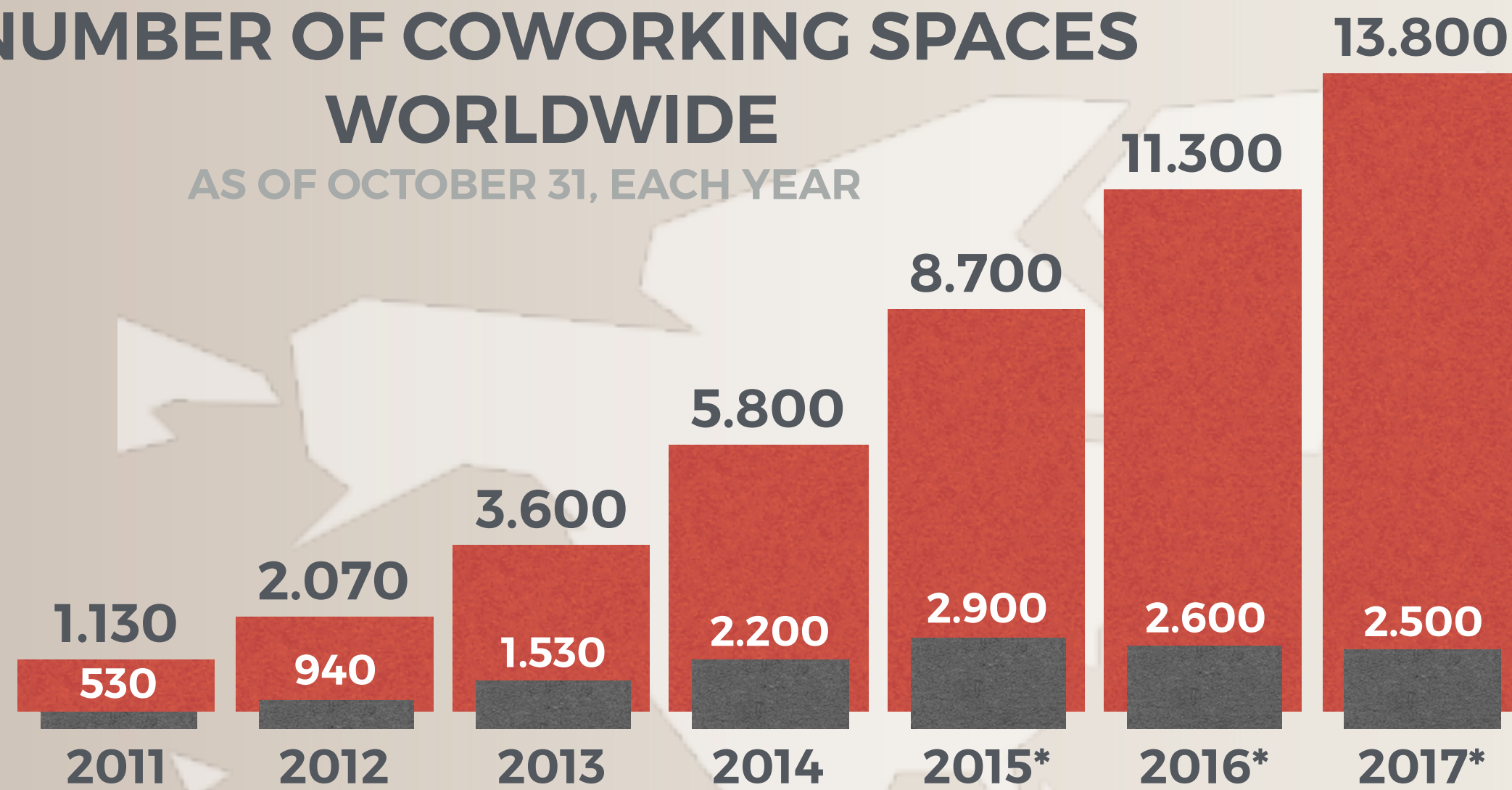
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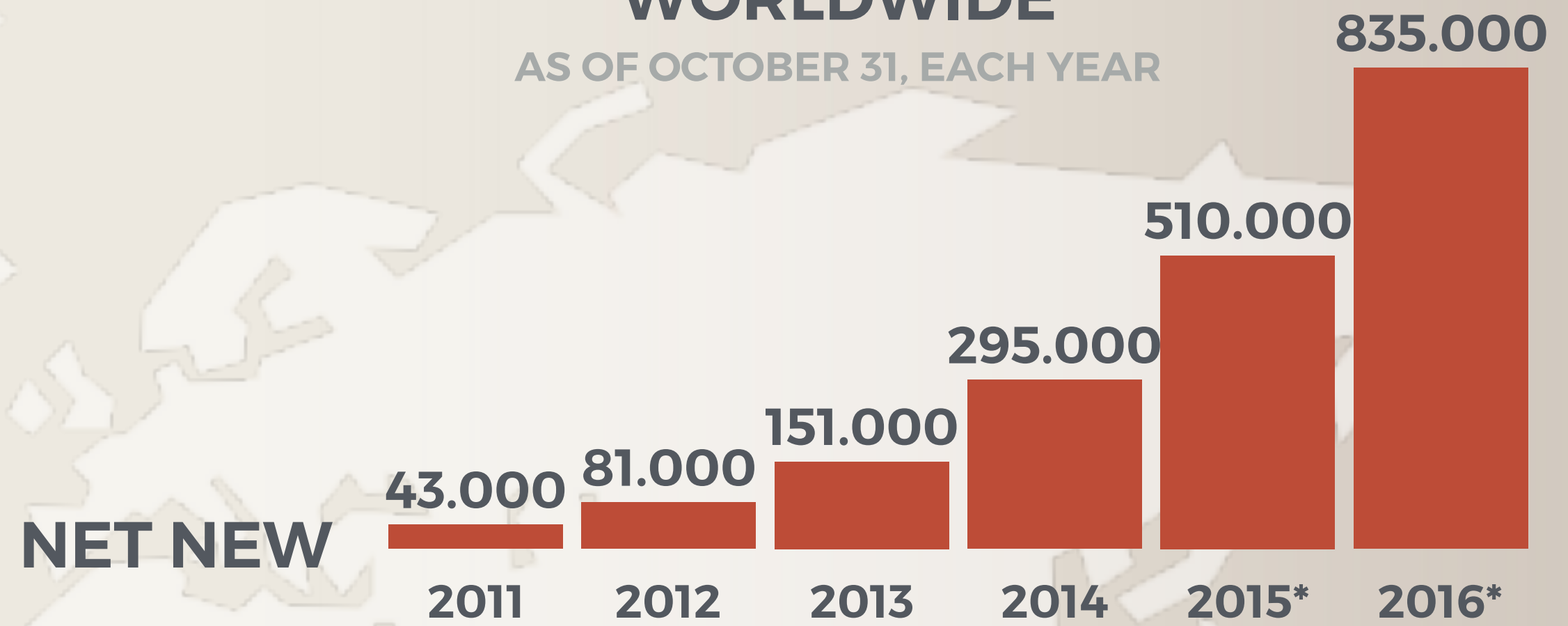
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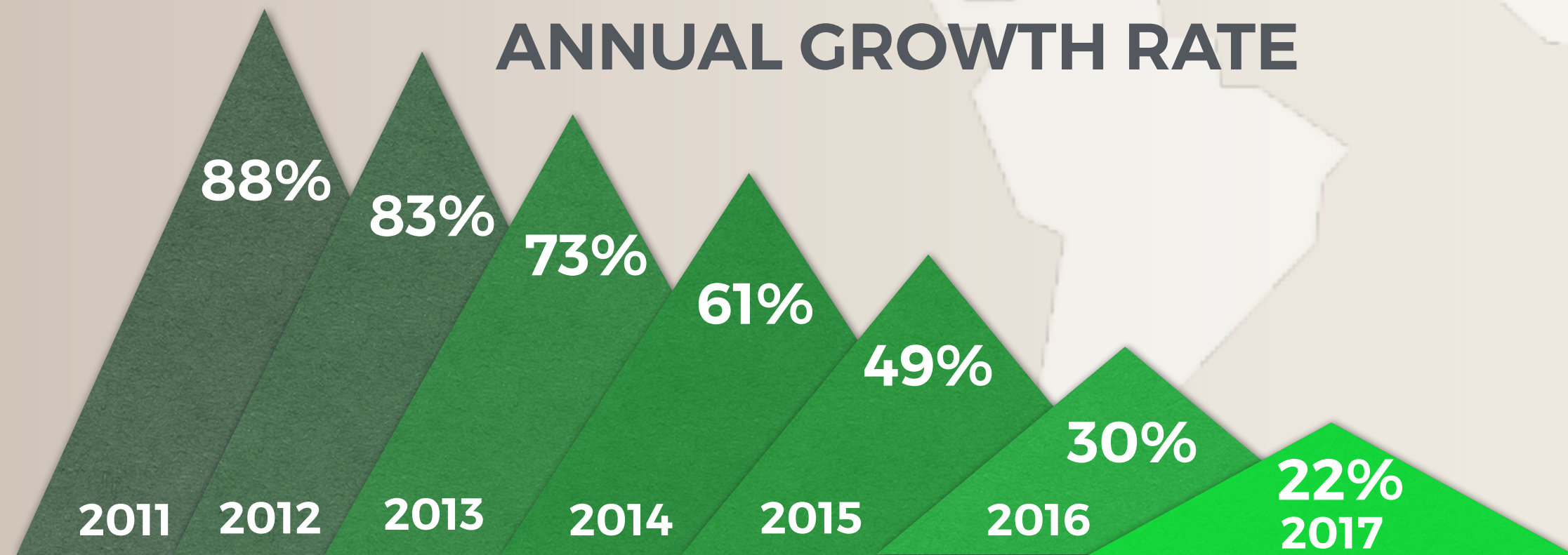


NUMBER OF MEMBERS WORLDWIDE

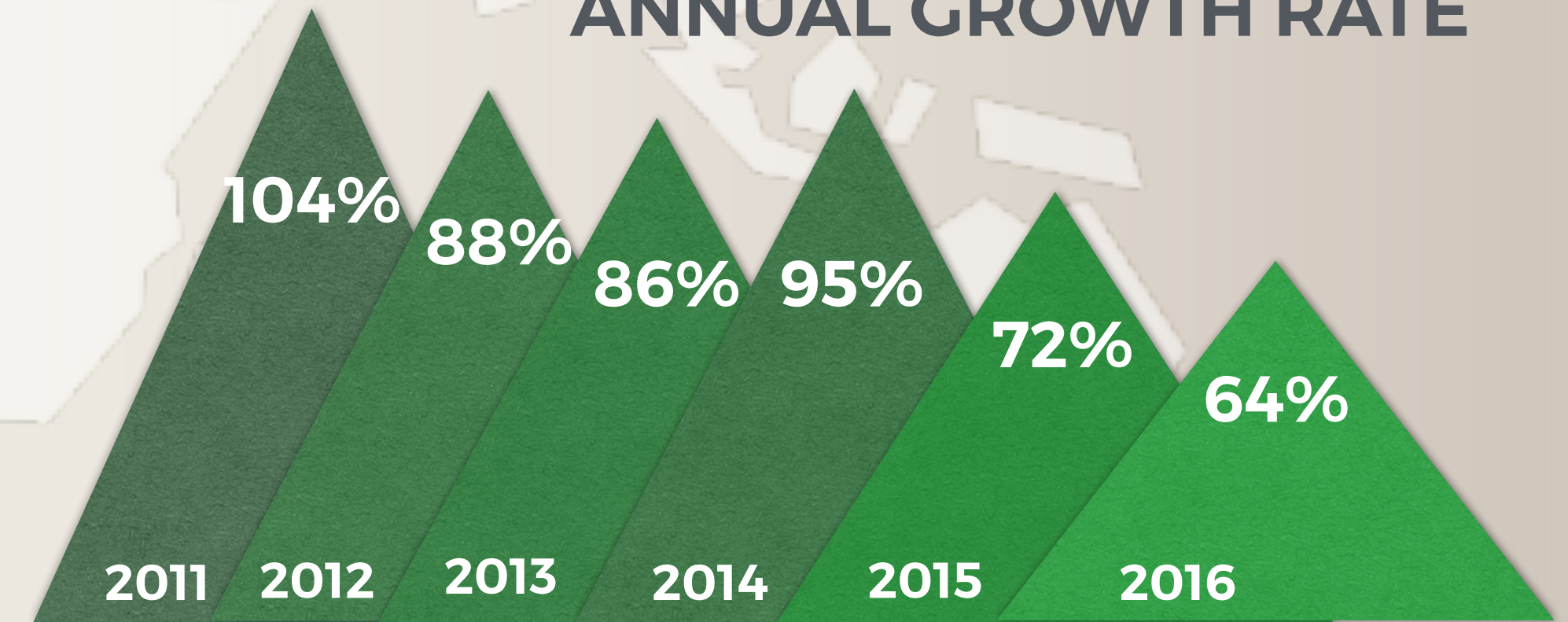
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ANNUAL GROWTH RATE



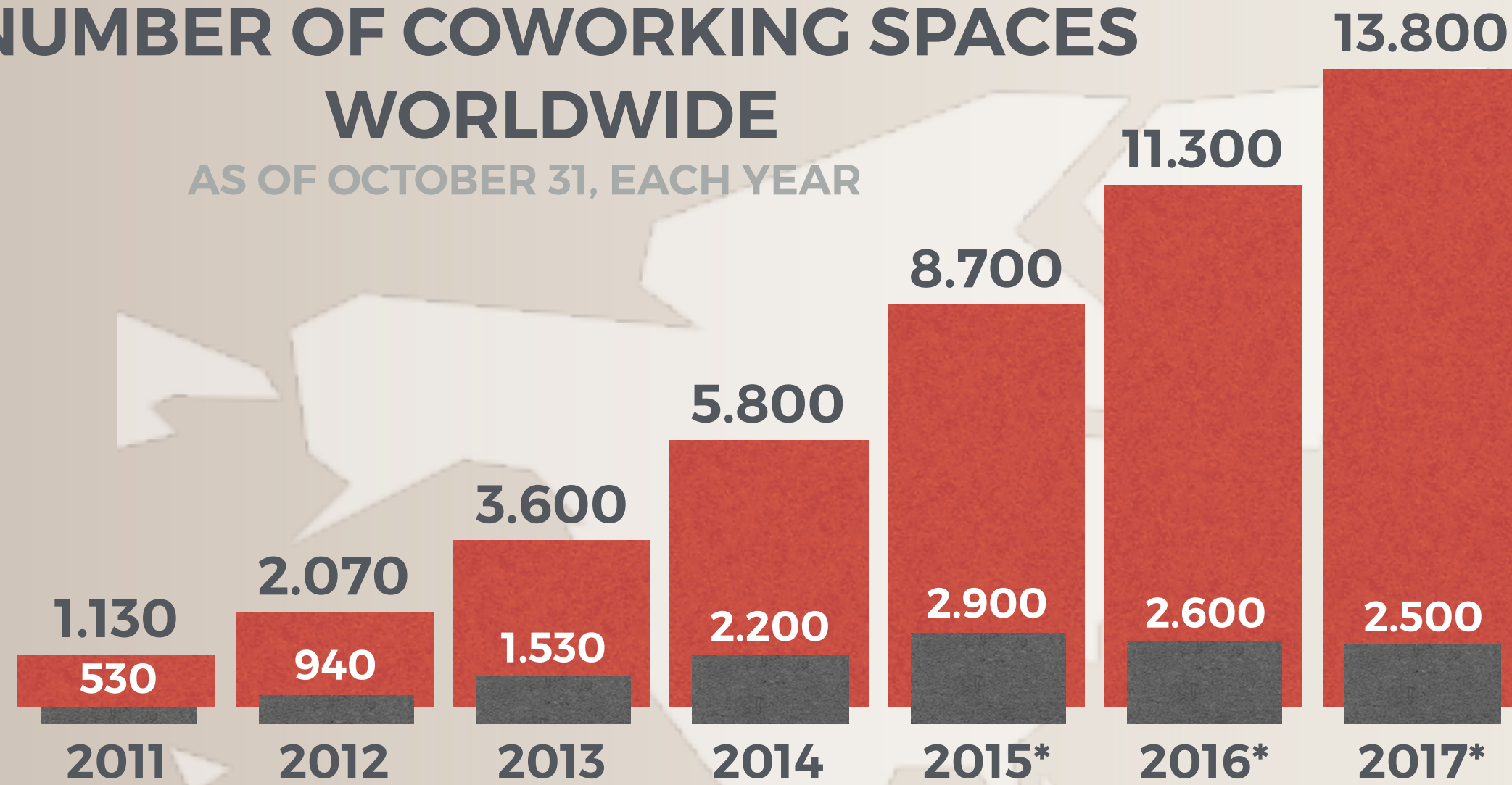
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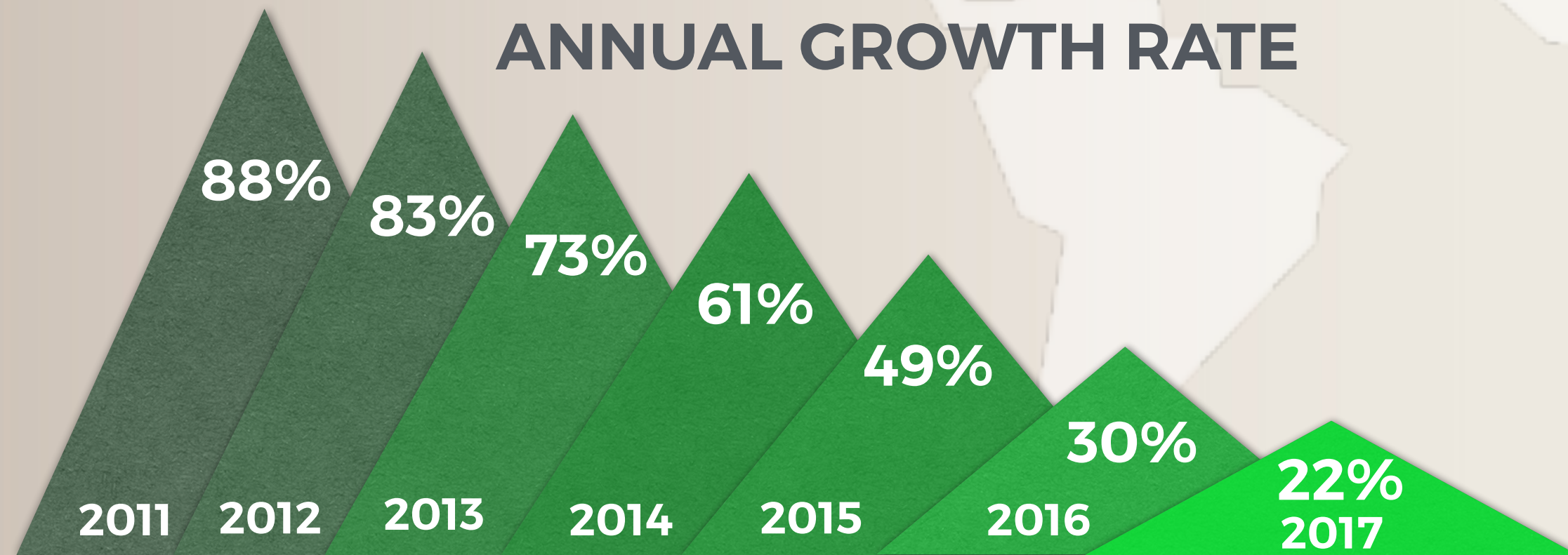


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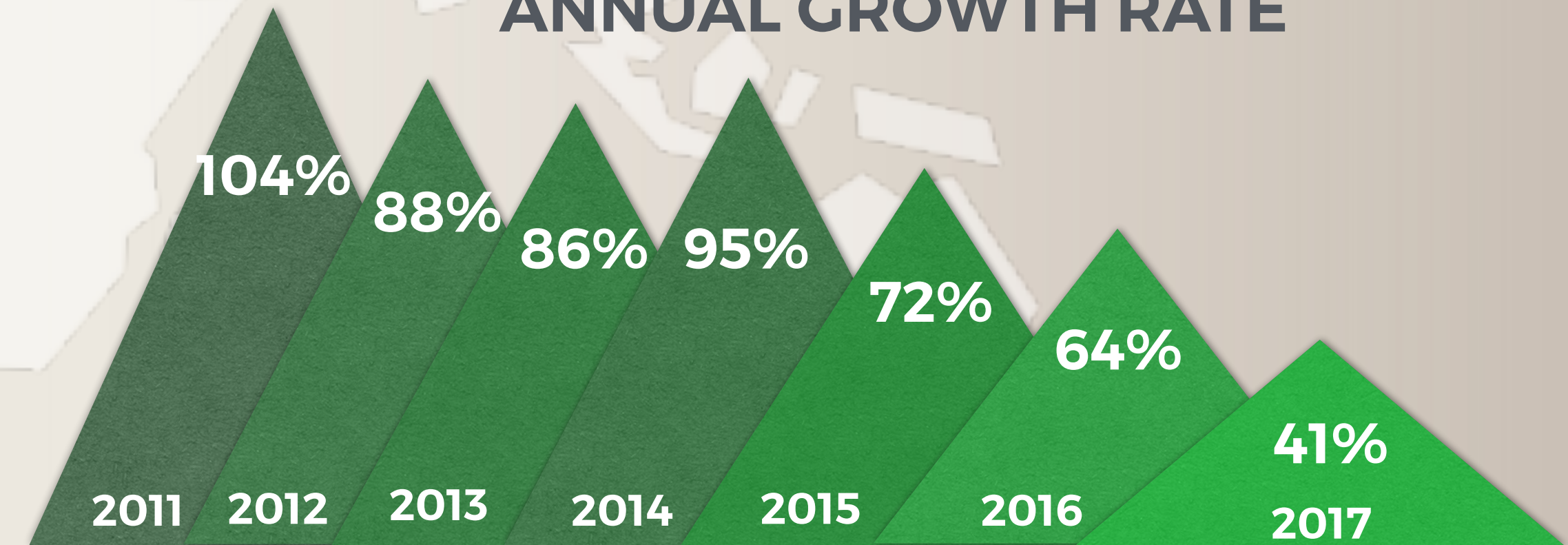
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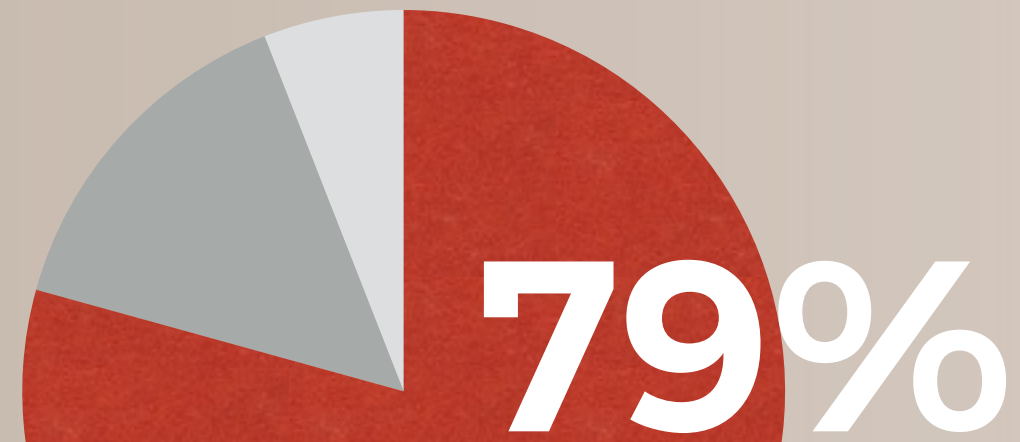
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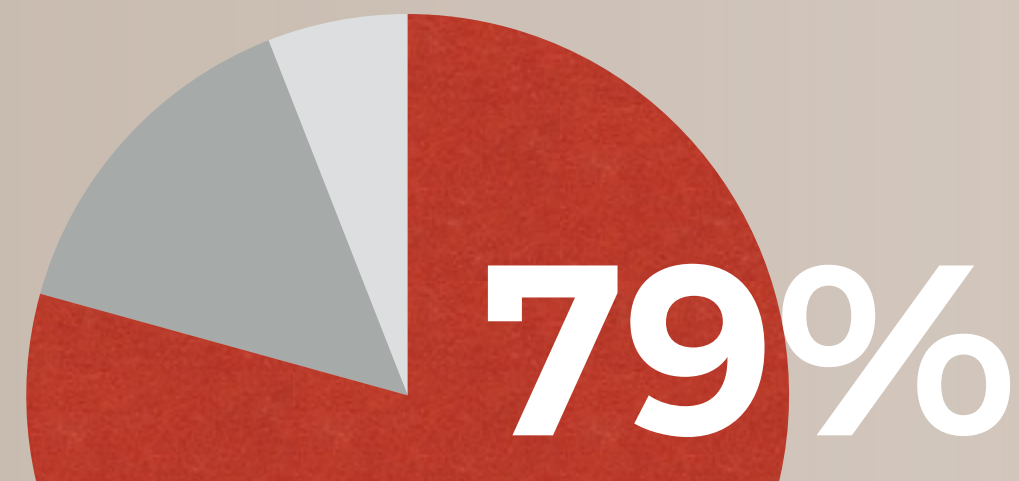
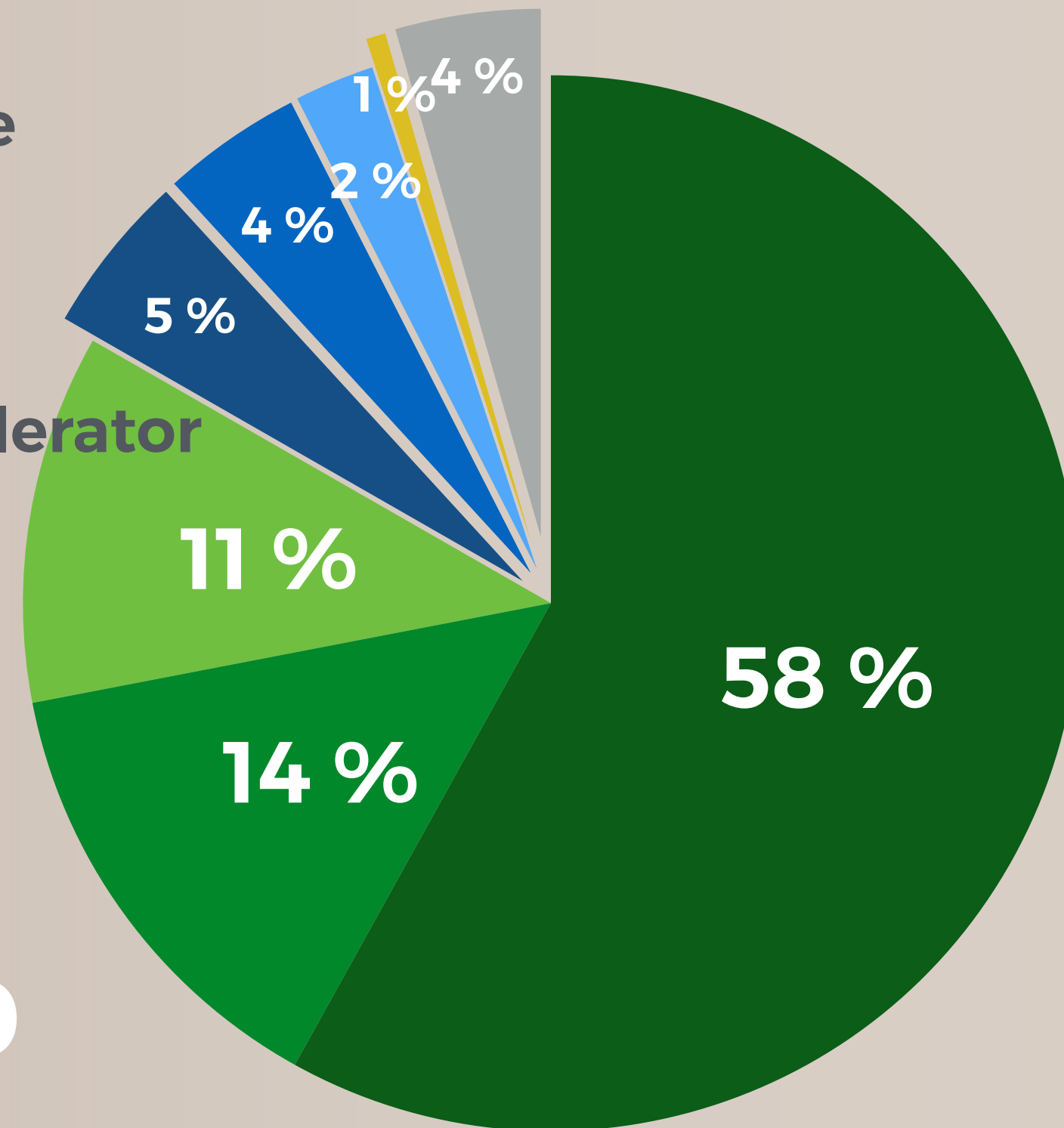
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of coworking spaces say,
they are “more than
just a coworking space”.
15% are fine with this
description, and 6% can’t
make a decision

The location is mainly a...

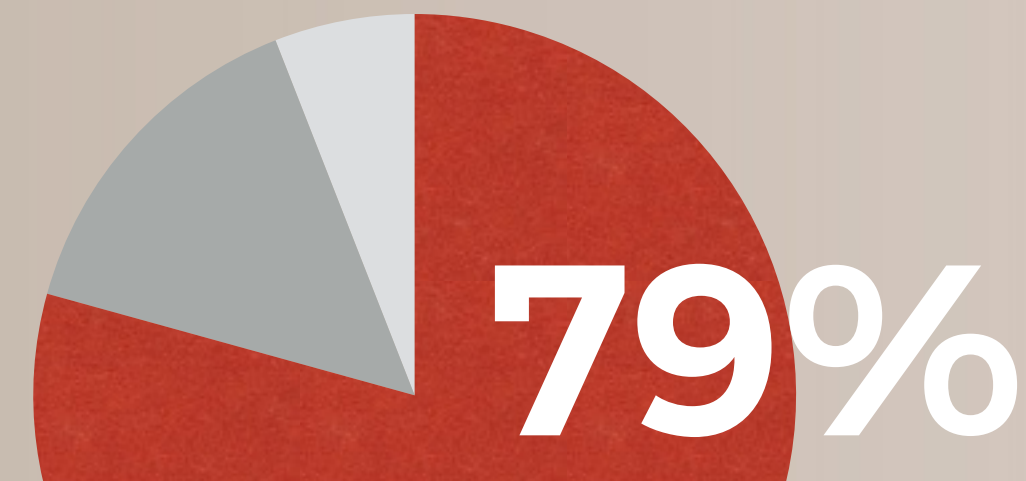
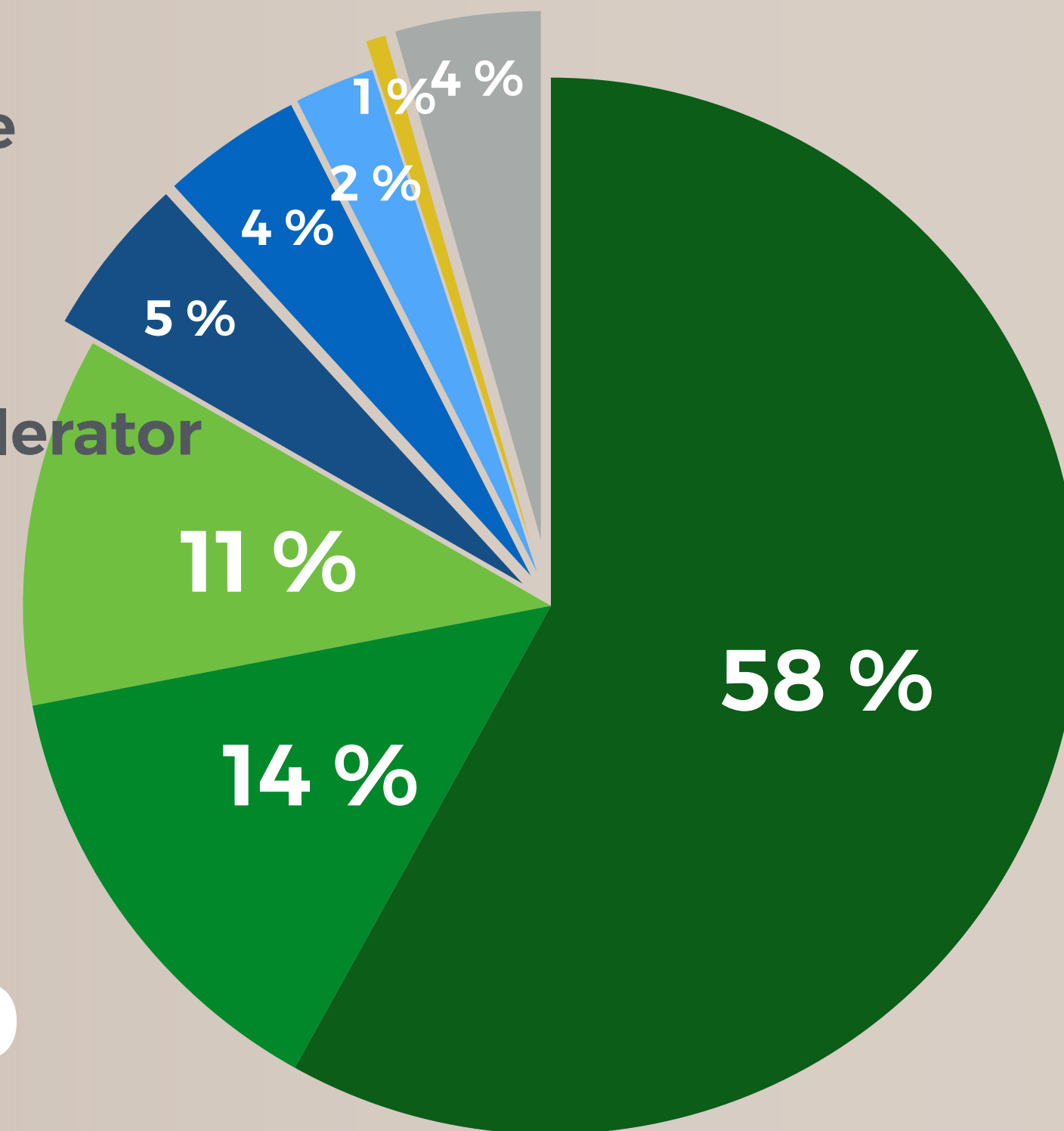
- Coworking Space
- Community Space
- Mixed Space
- Shared Office
- Business Center
- Incubator or Accelerator
- Artist Space
- Other



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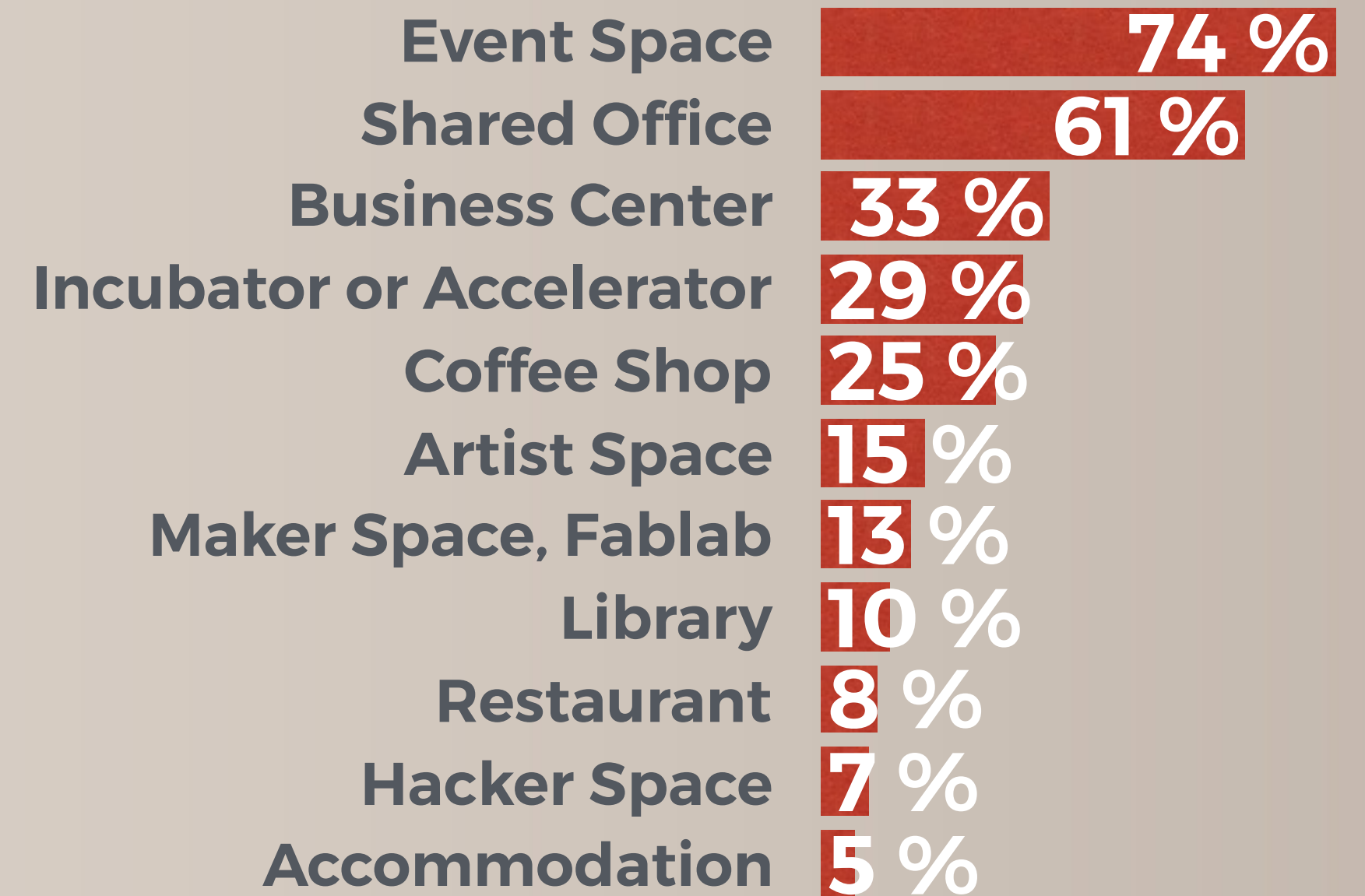
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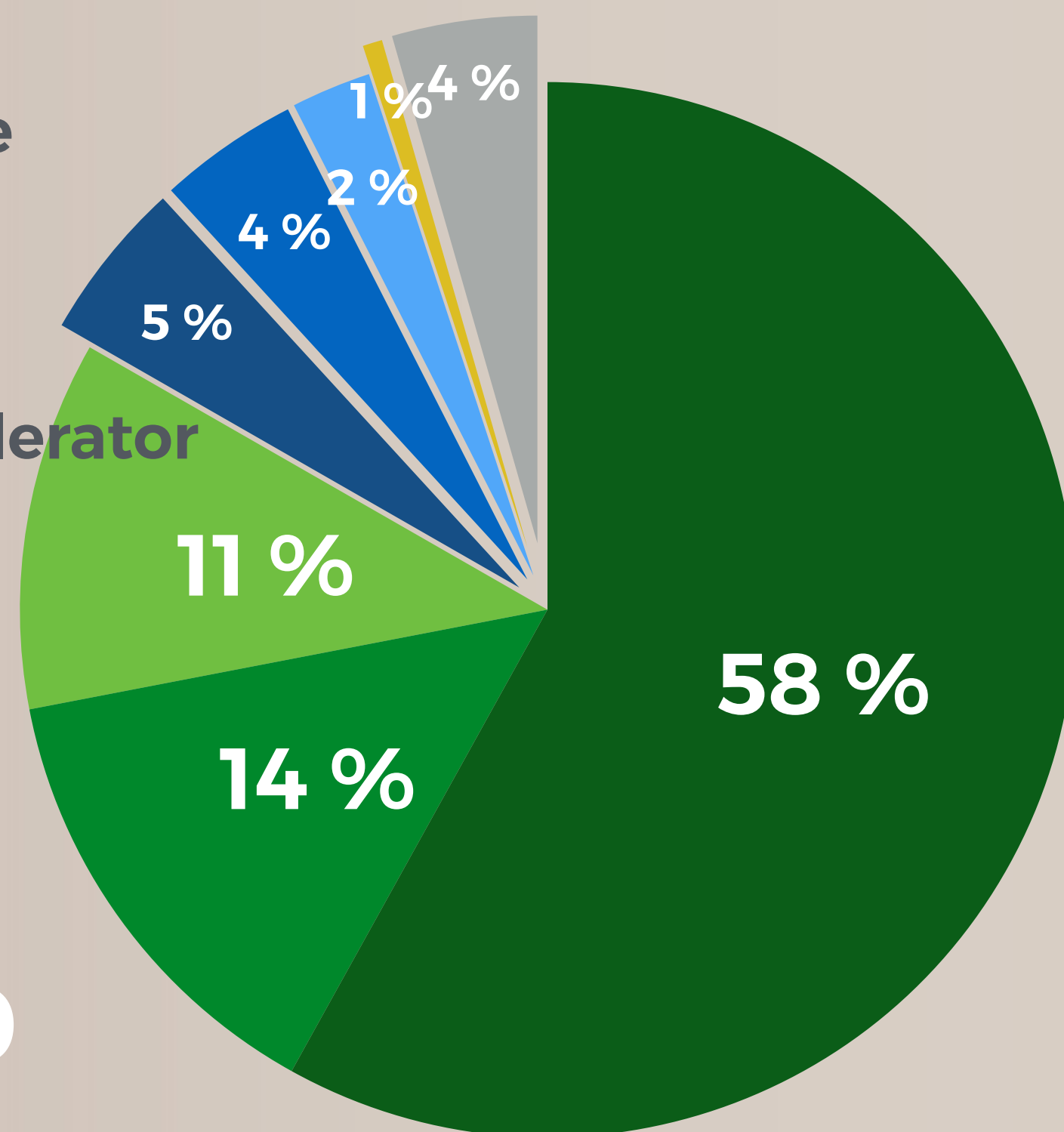
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with elements of a...



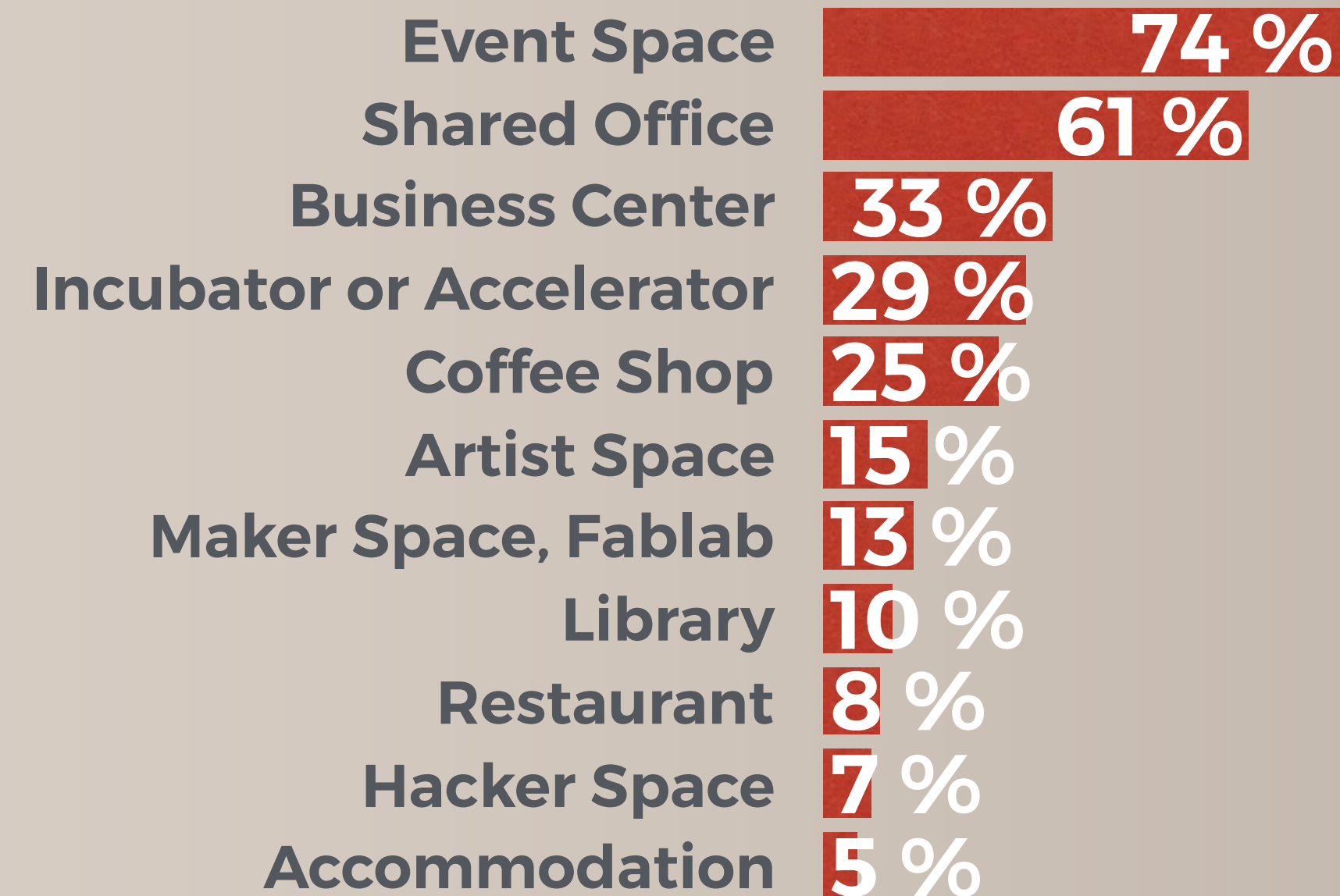
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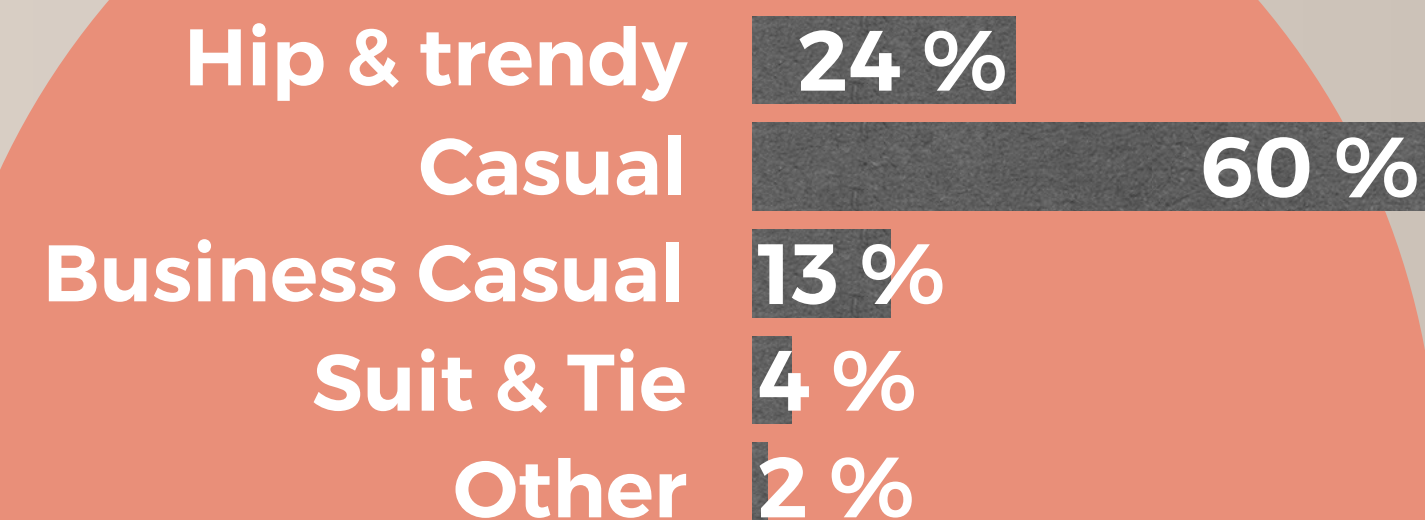


79%
of coworking spaces say, they are “more than just a coworking space”.
15% are fine with this description, and 6% can’t make a decision

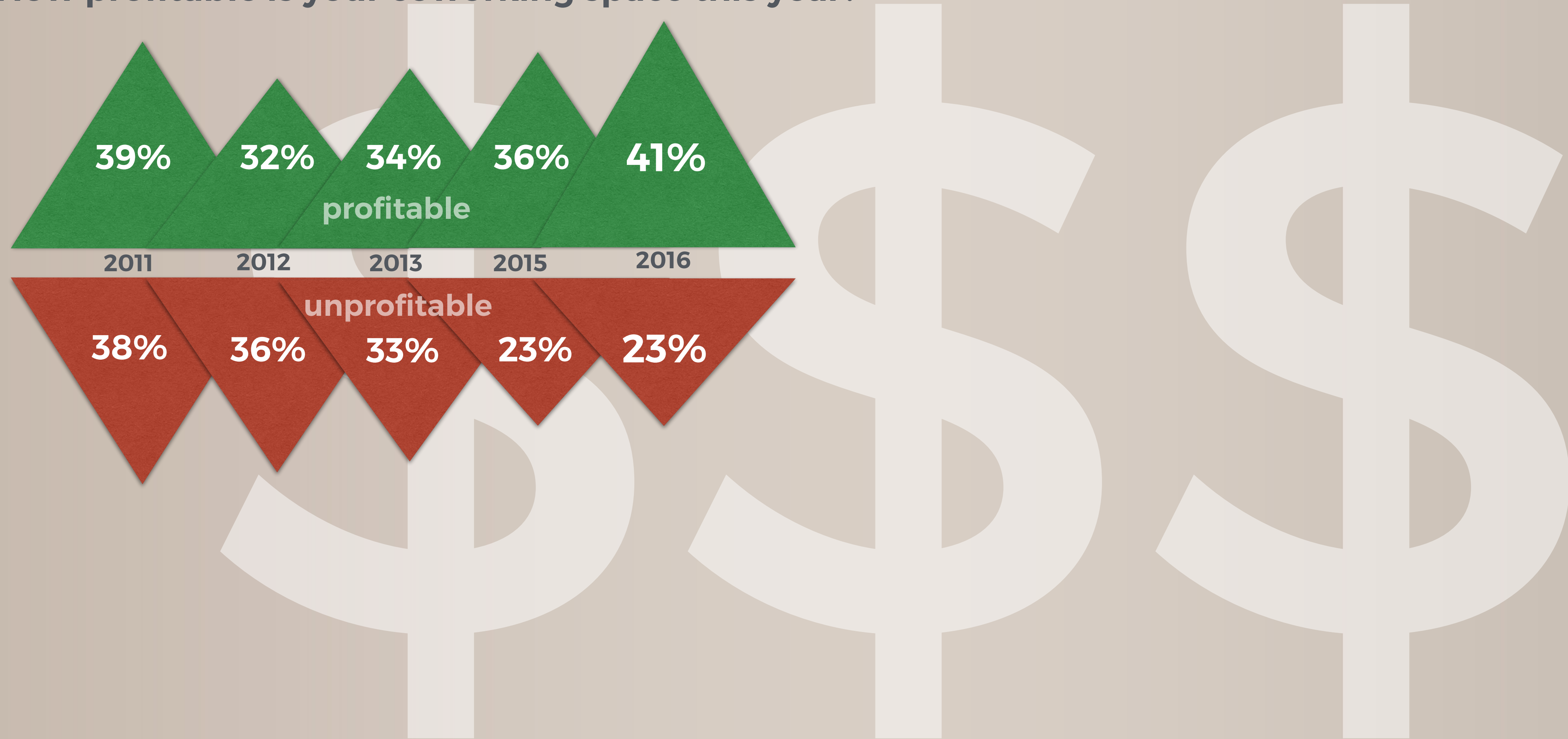
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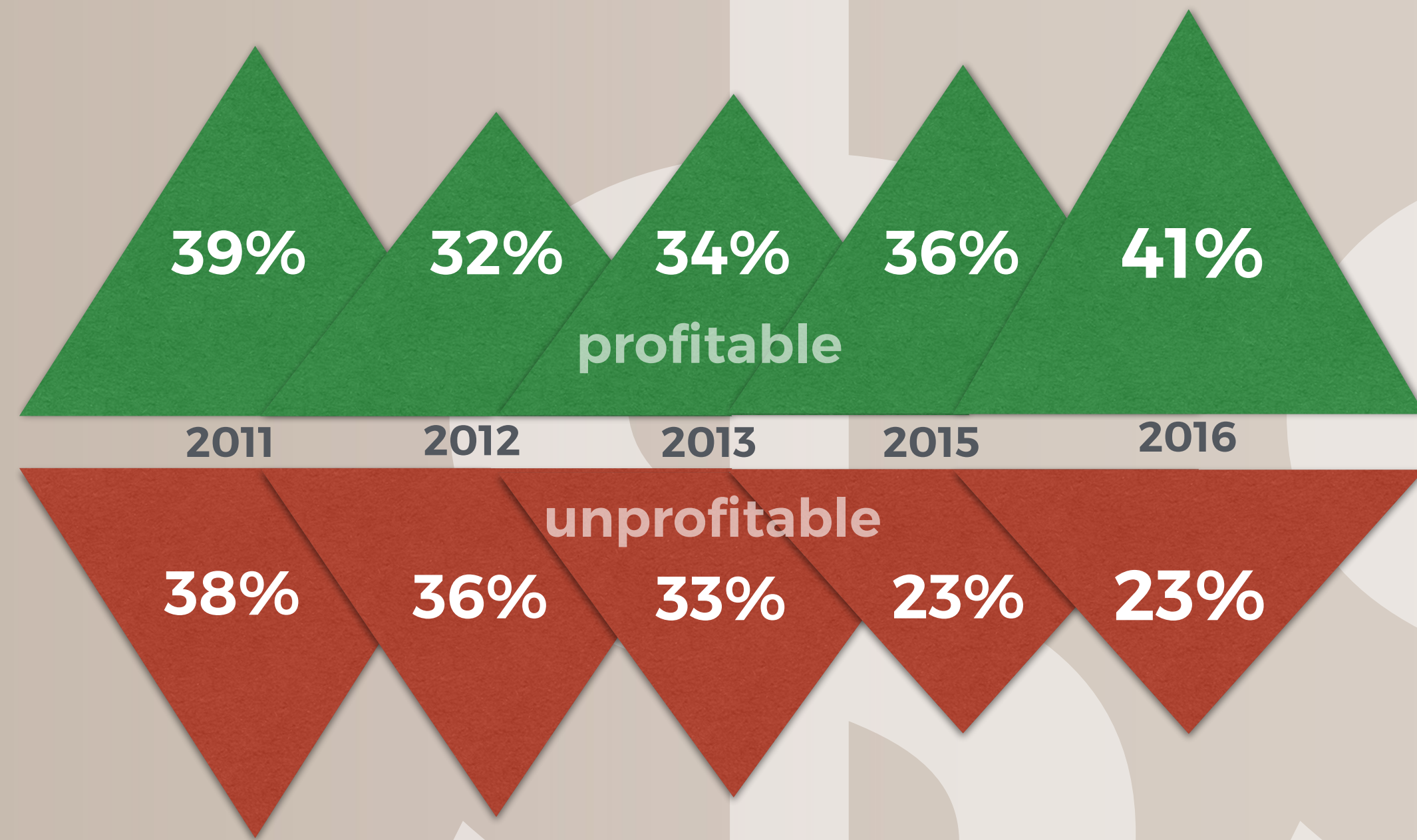
How members describe the atmosphere of their coworking space



How profitable is your coworking space this year?

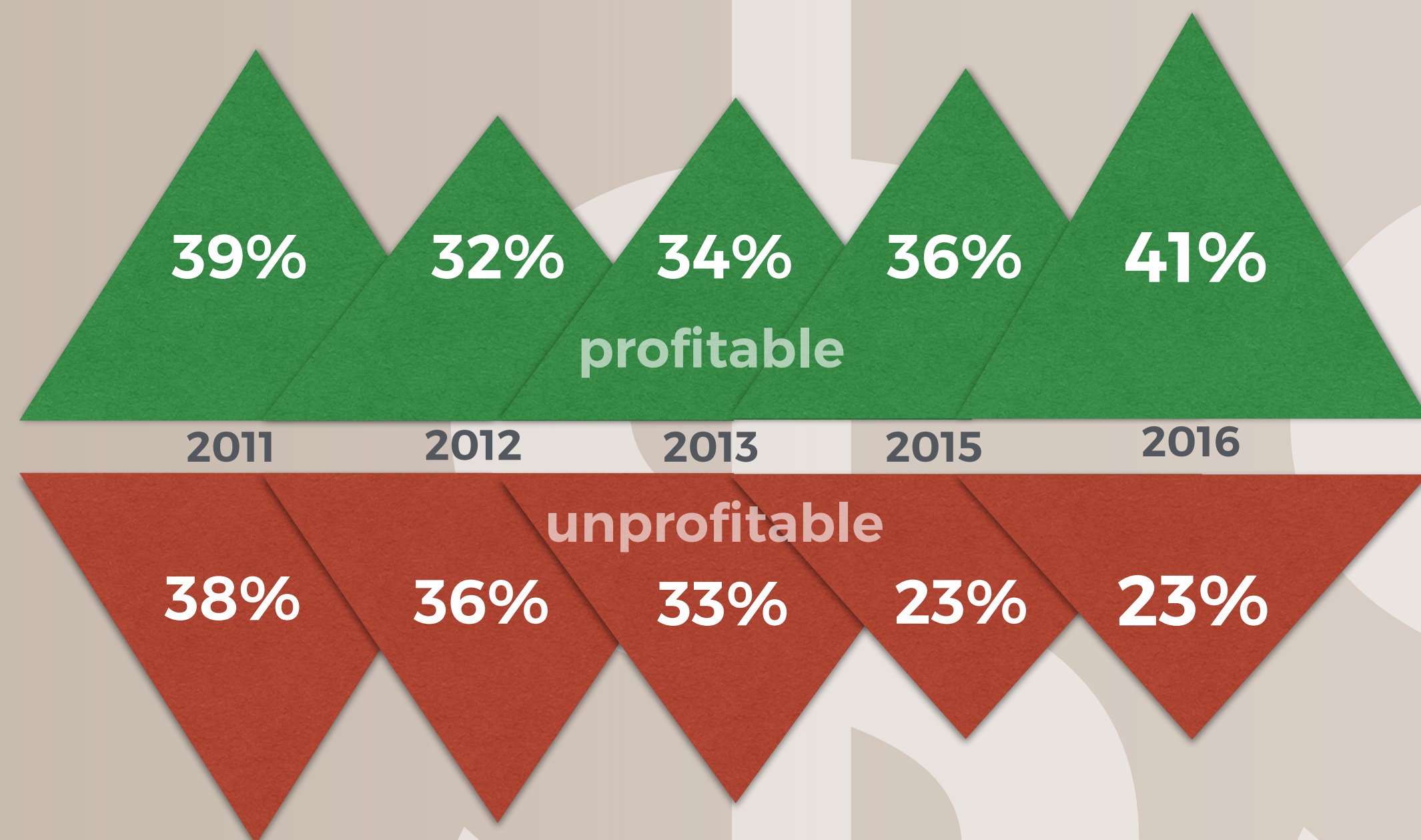


How profitable is your coworking space this year?



29%
of coworking spaces
don't need to be
profitable on their own
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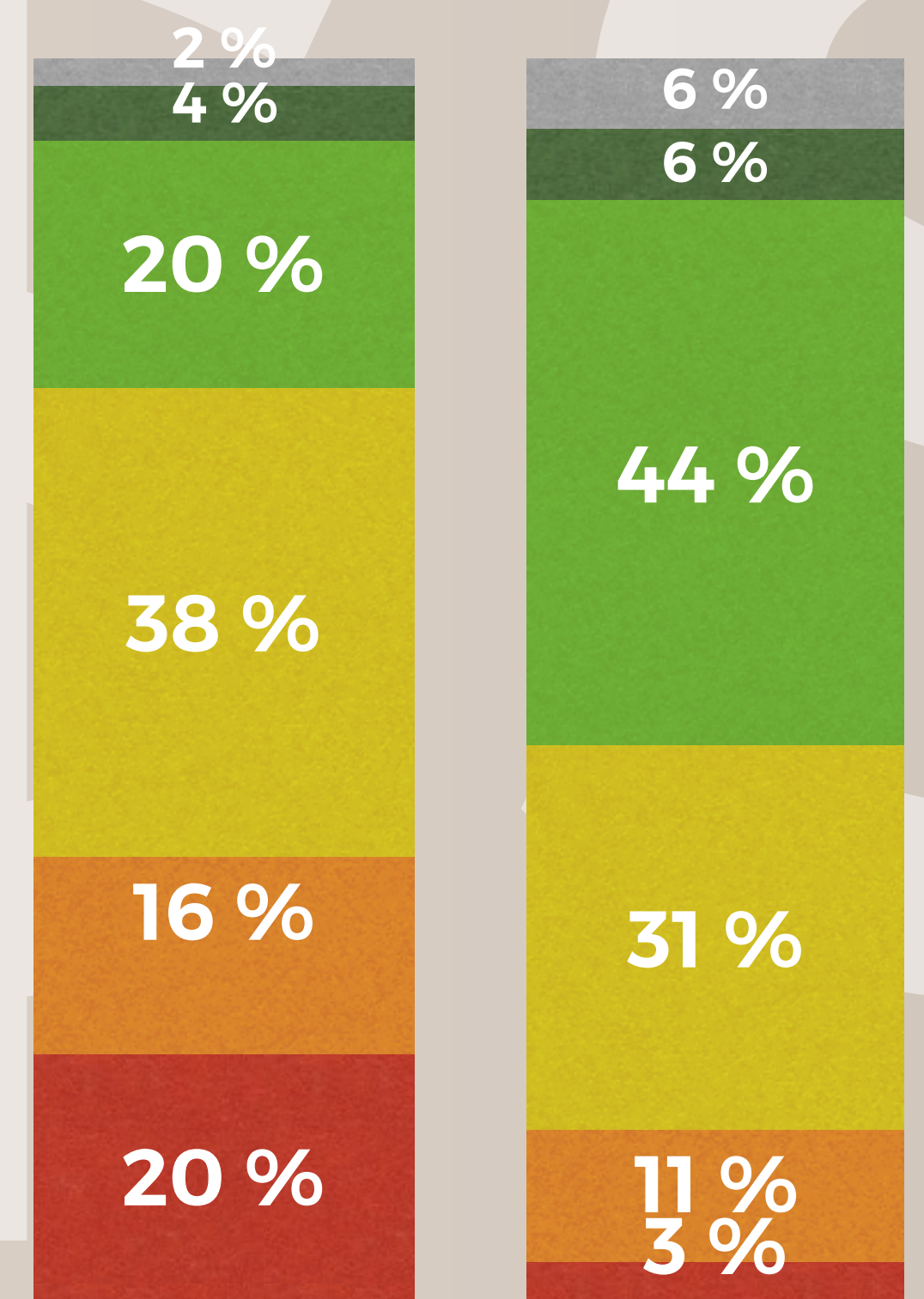
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- n.a.
- Very good
- Rather good
- Somewhat
- Rather bad
- Very bad

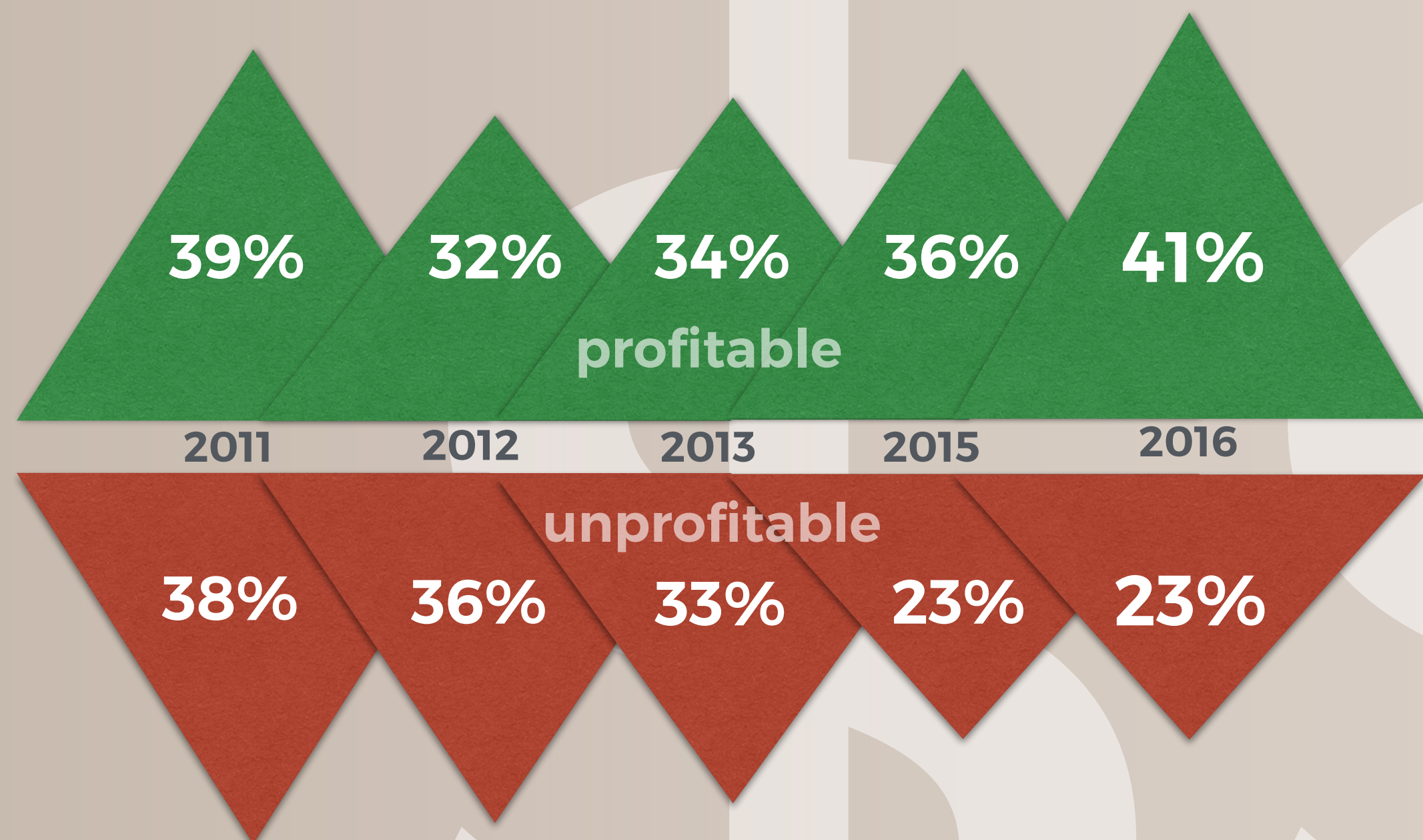
How do you rate your salary or compensation which you receive from your coworking space?



Owner, Founder

Staff

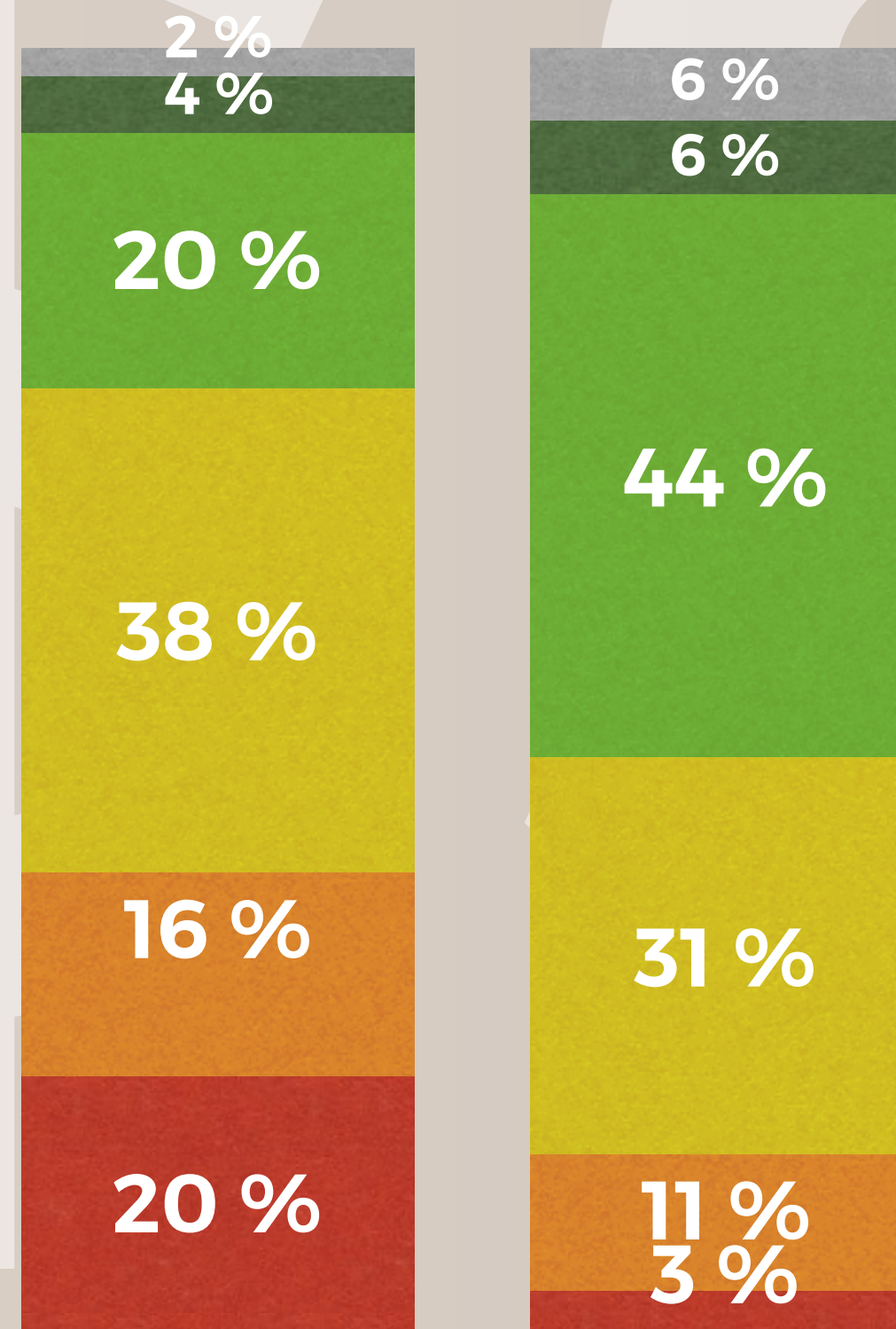
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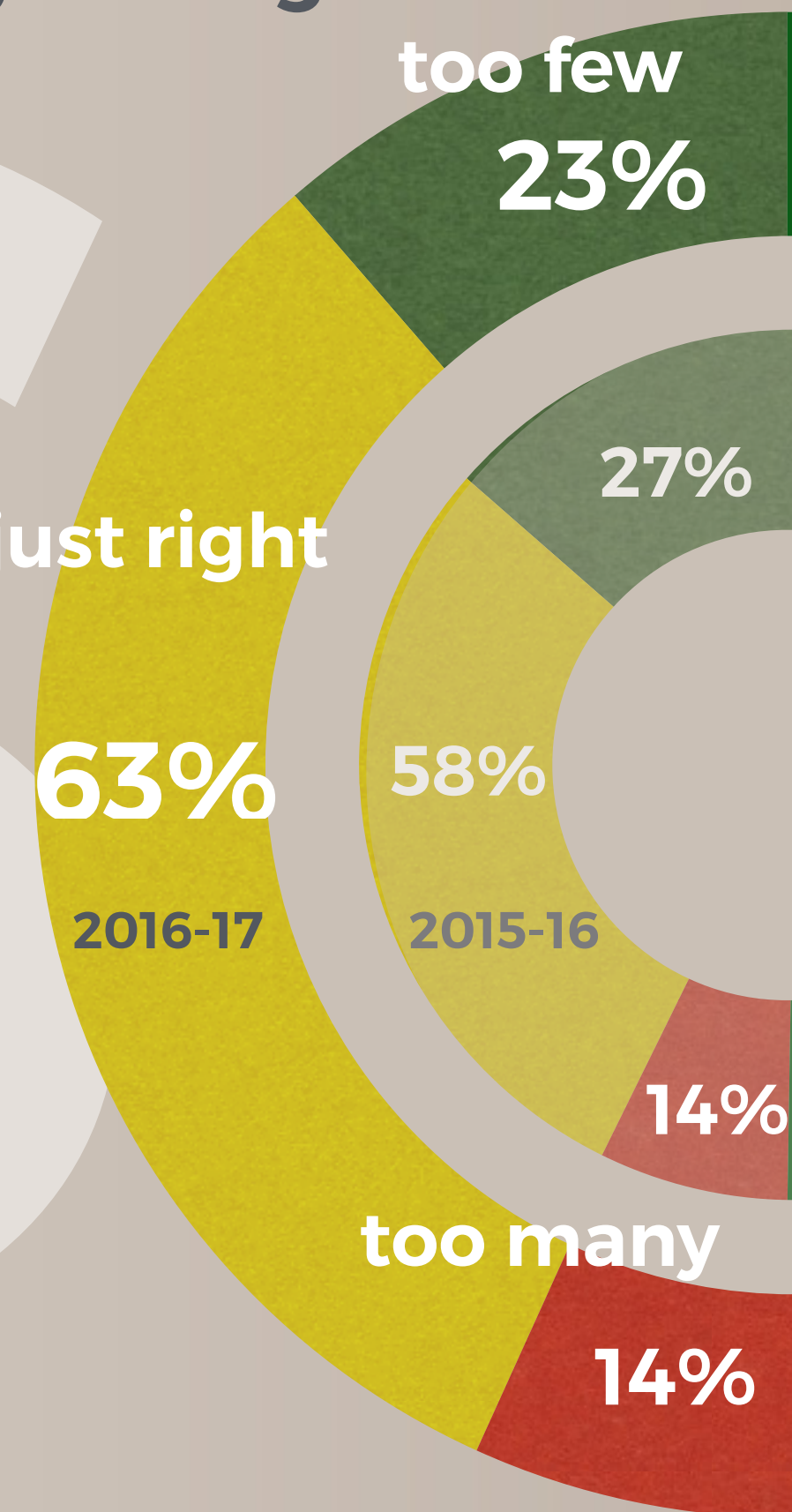
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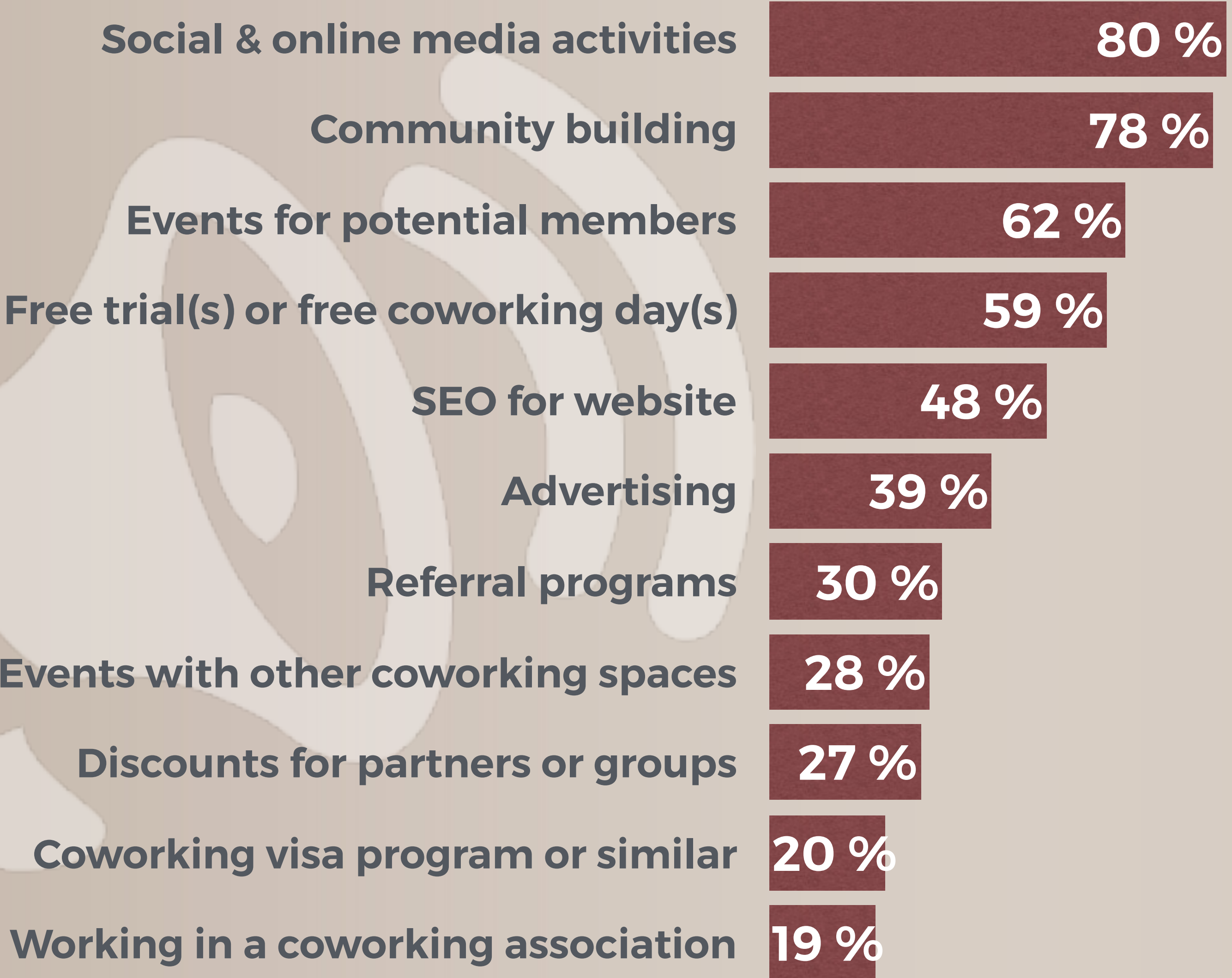
Owner, Founder

Staff

Too many or too few coworking spaces in your region?

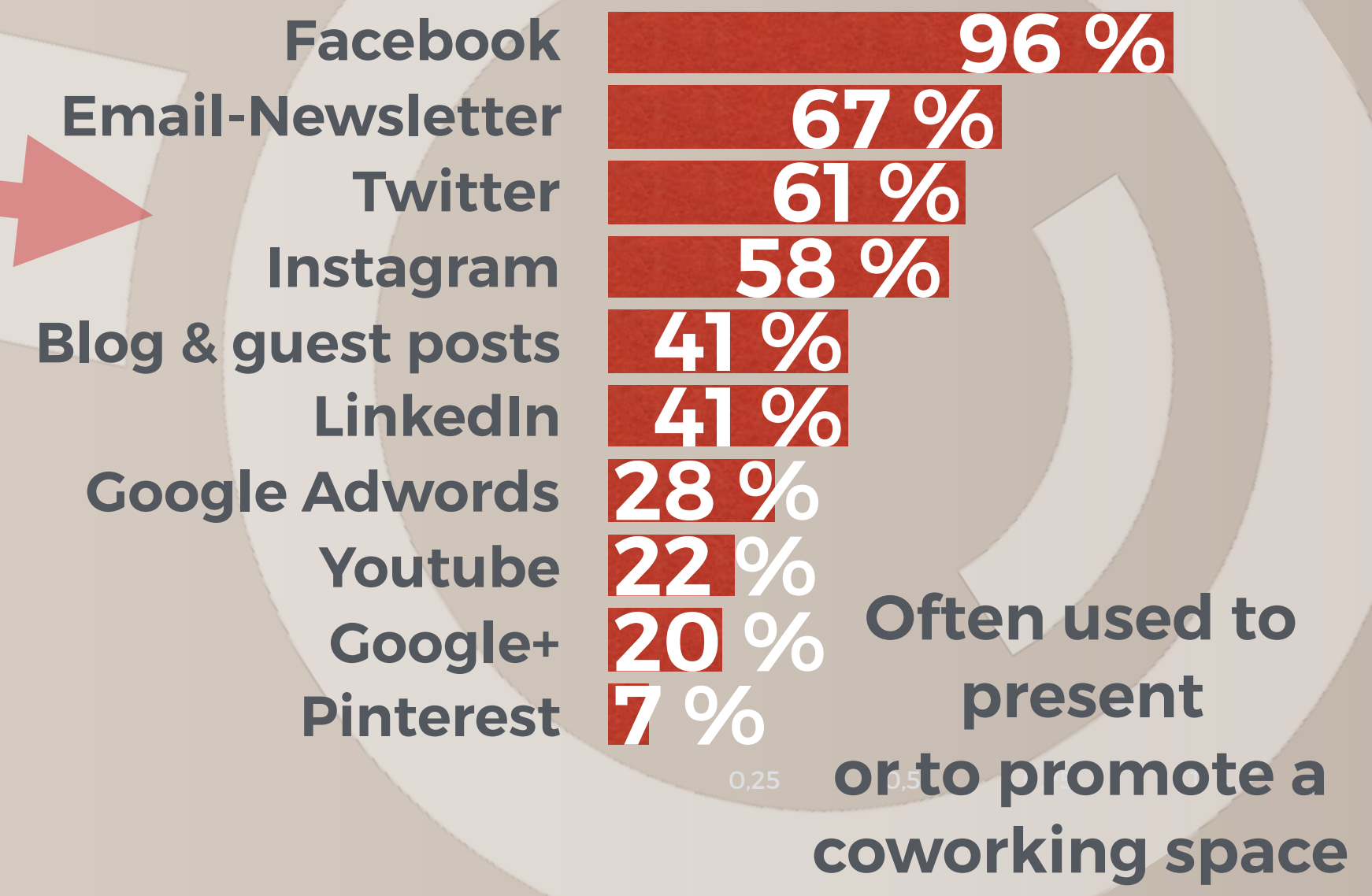
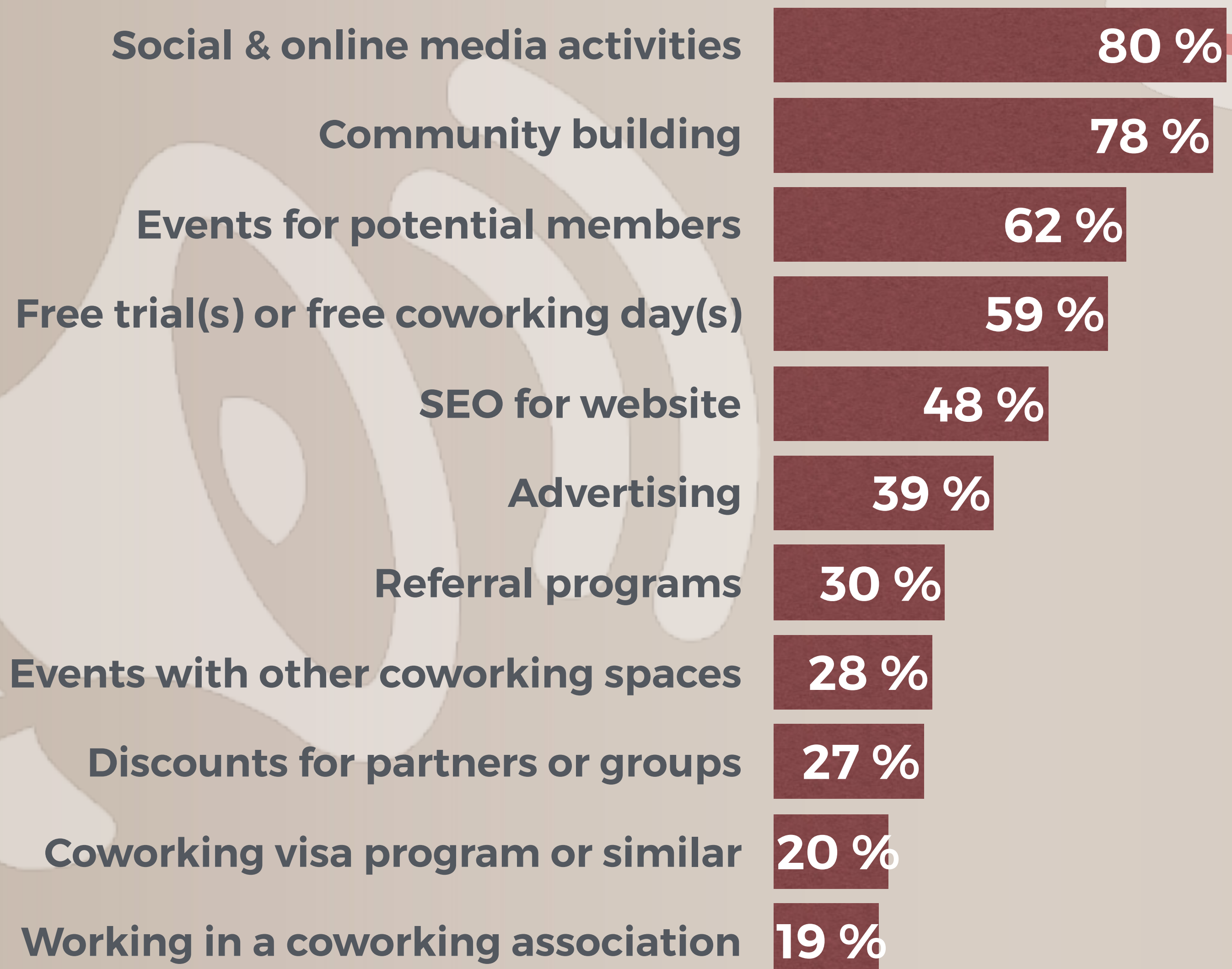


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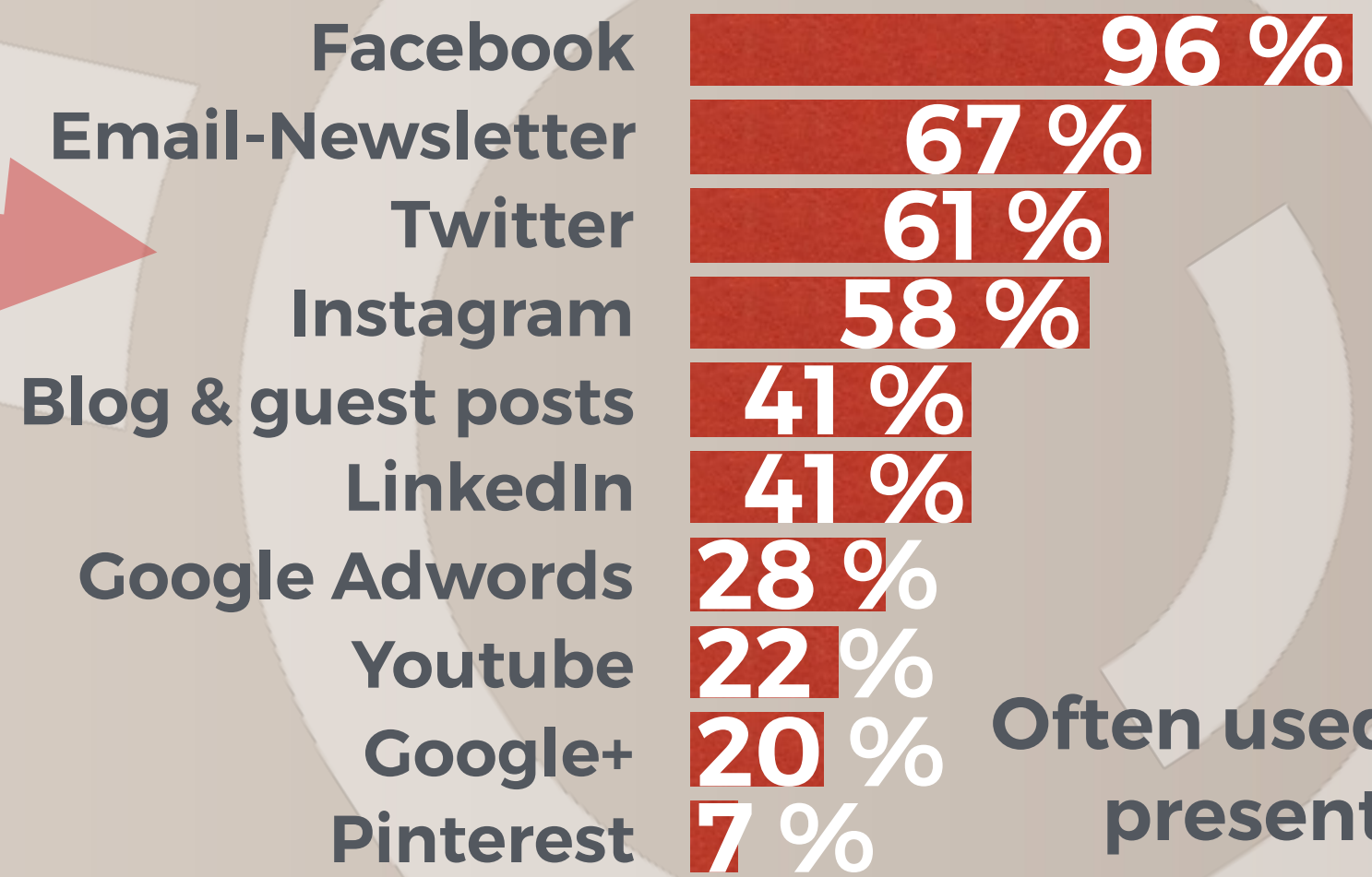
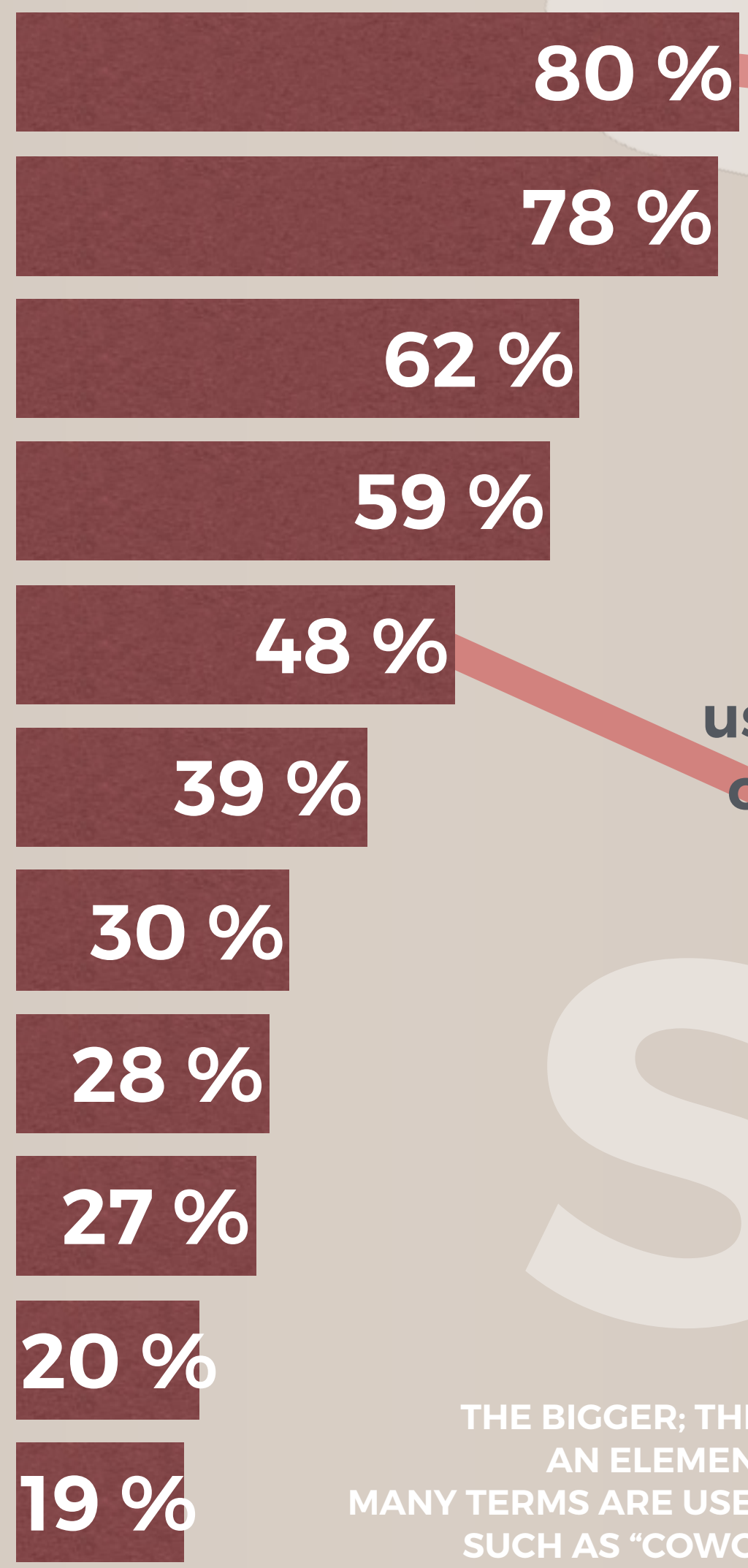
0.2 0.4 0.6 0.8

THE COWORKING SPACES: MAIN ACTIVITIES TO ATTRACT NEW MEMBERS



THE COWORKING SPACES: MAIN ACTIVITIES TO ATTRACT NEW MEMBERS

- Social & online media activities
- Community building
- Events for potential members
- Free trial(s) or free coworking day(s)
- SEO for website
- Advertising
- Referral programs
- Events with other coworking spaces
- Discounts for partners or groups
- Coworking visa program or similar
- Working in a coworking association



Often used to present or to promote a coworking space

Most often used elements of SEO terms

SEO

THE BIGGER; THE MORE OFTEN AN ELEMENT IS USED MANY TERMS ARE USED IN COMBINATIONS, SUCH AS "COWORKING SPACE" "SHARED OFFICE SPACE" OR "MEETING SPACE"

SPACE
 ENTREPRENEURS
 CENTER
 COLLABORATIVE **OFFICE**
 AFFORDABLE TEMPORARY
 REMOTE RENT CO-WORKING
 SPACES FURNISHED COWORK
 FLEXIBLE FREELANCERS ROOM STARTUP
 SERVICES "CO WORKING" VIRTUAL
COWORKING
 MEETING AGILE BUSINESS EVENTS
 CREATIVE EVENT WORKSPACE
 COMMUNITY SHARED
"CITY NAME"
"LOCATION NAME"
 PRIVATE OFFICES

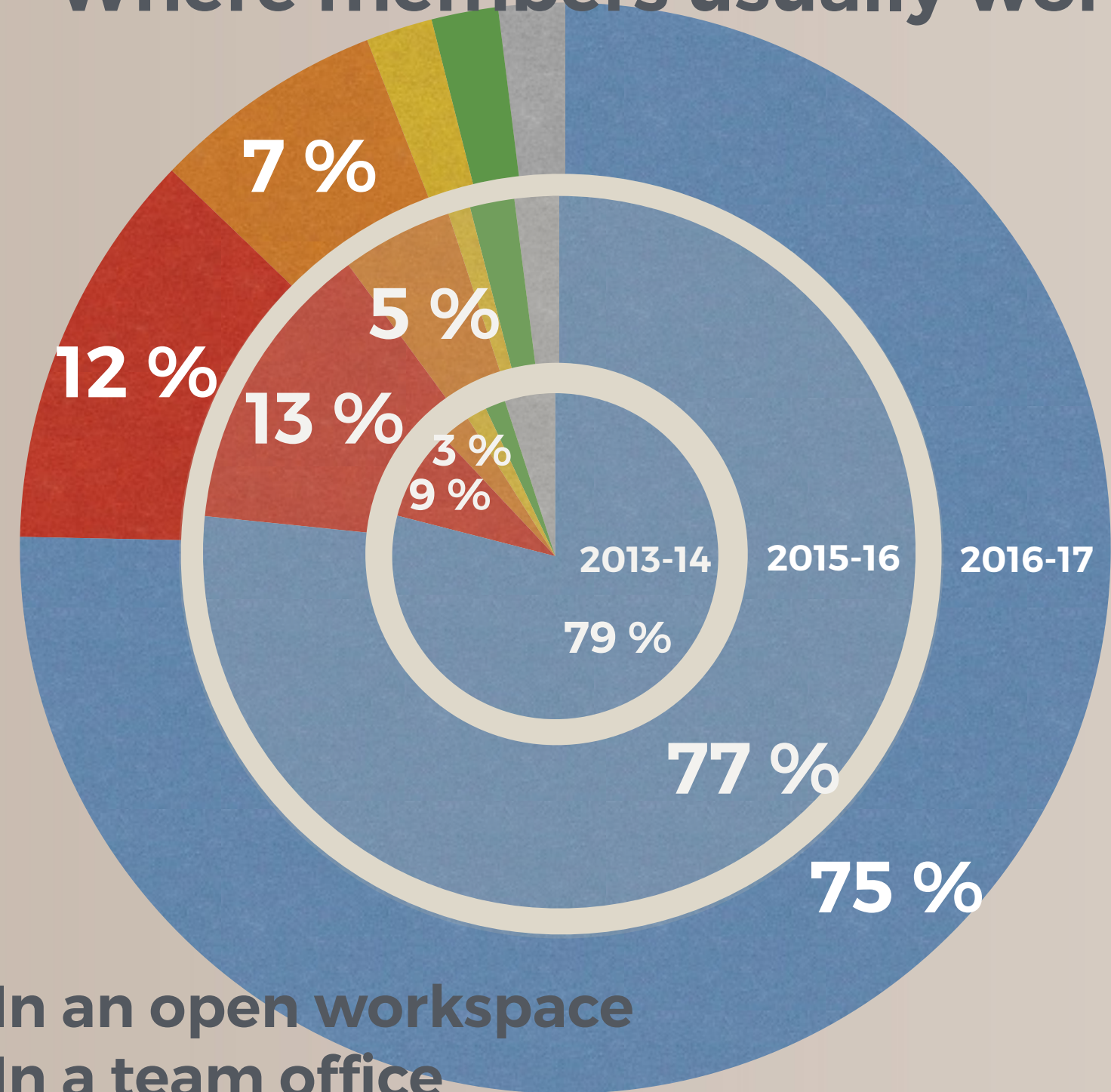
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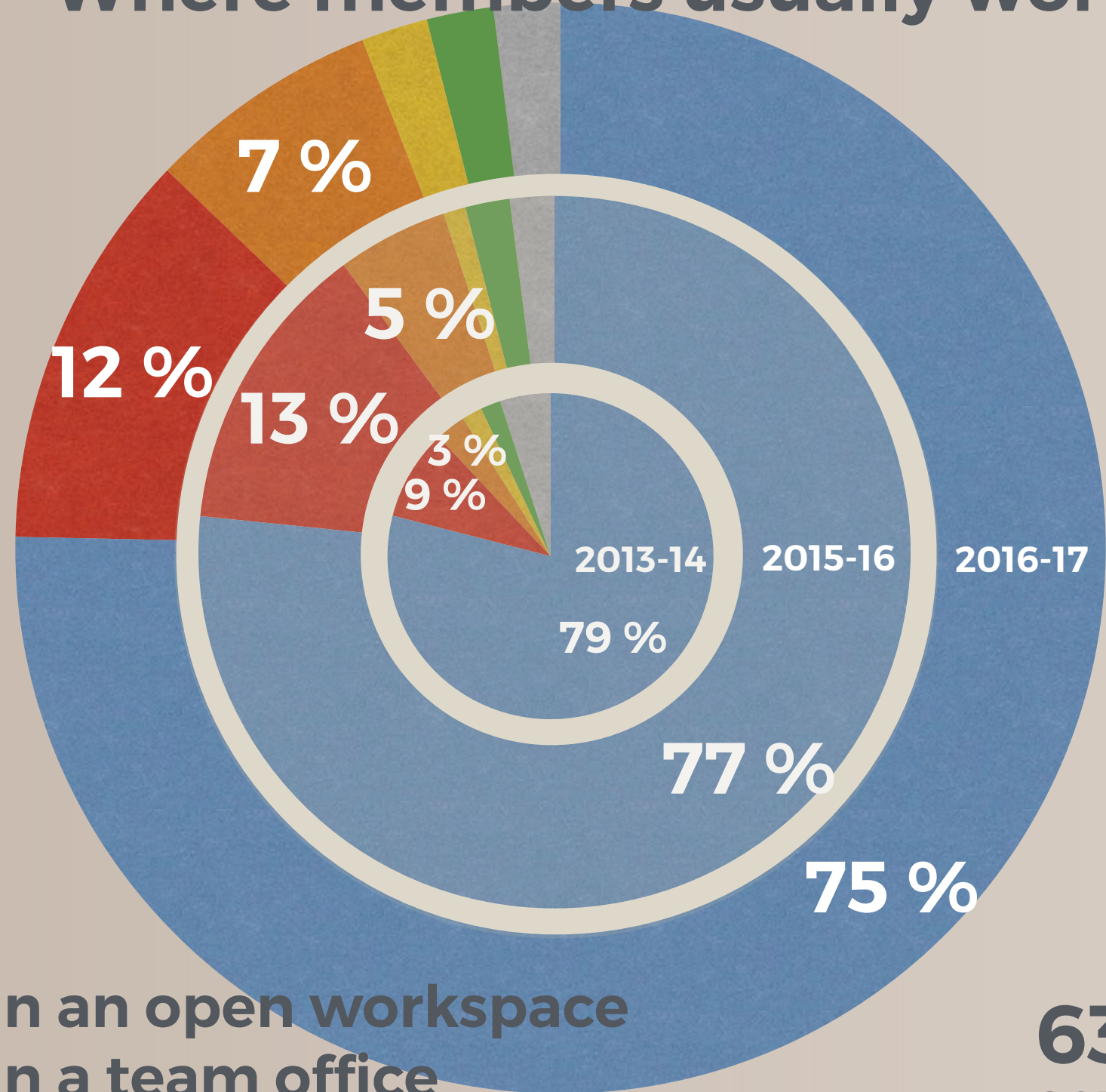
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COMMUNITY SHARED
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Where members usually work



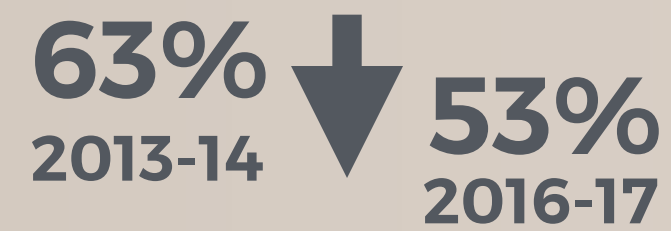
- In an open workspace
- In a team office
- In an individual office
- In a coffee area
- In a meeting room
- Other

Where members usually work

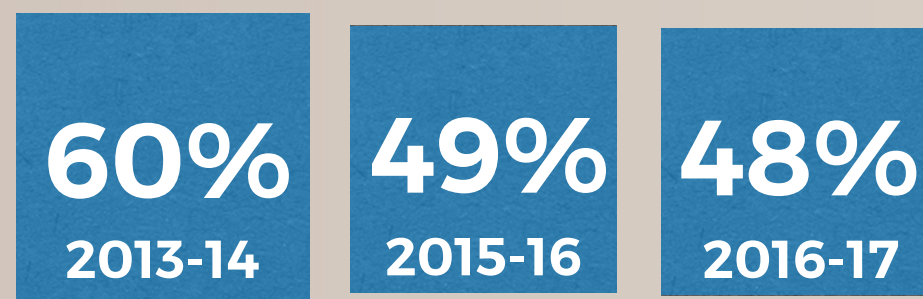


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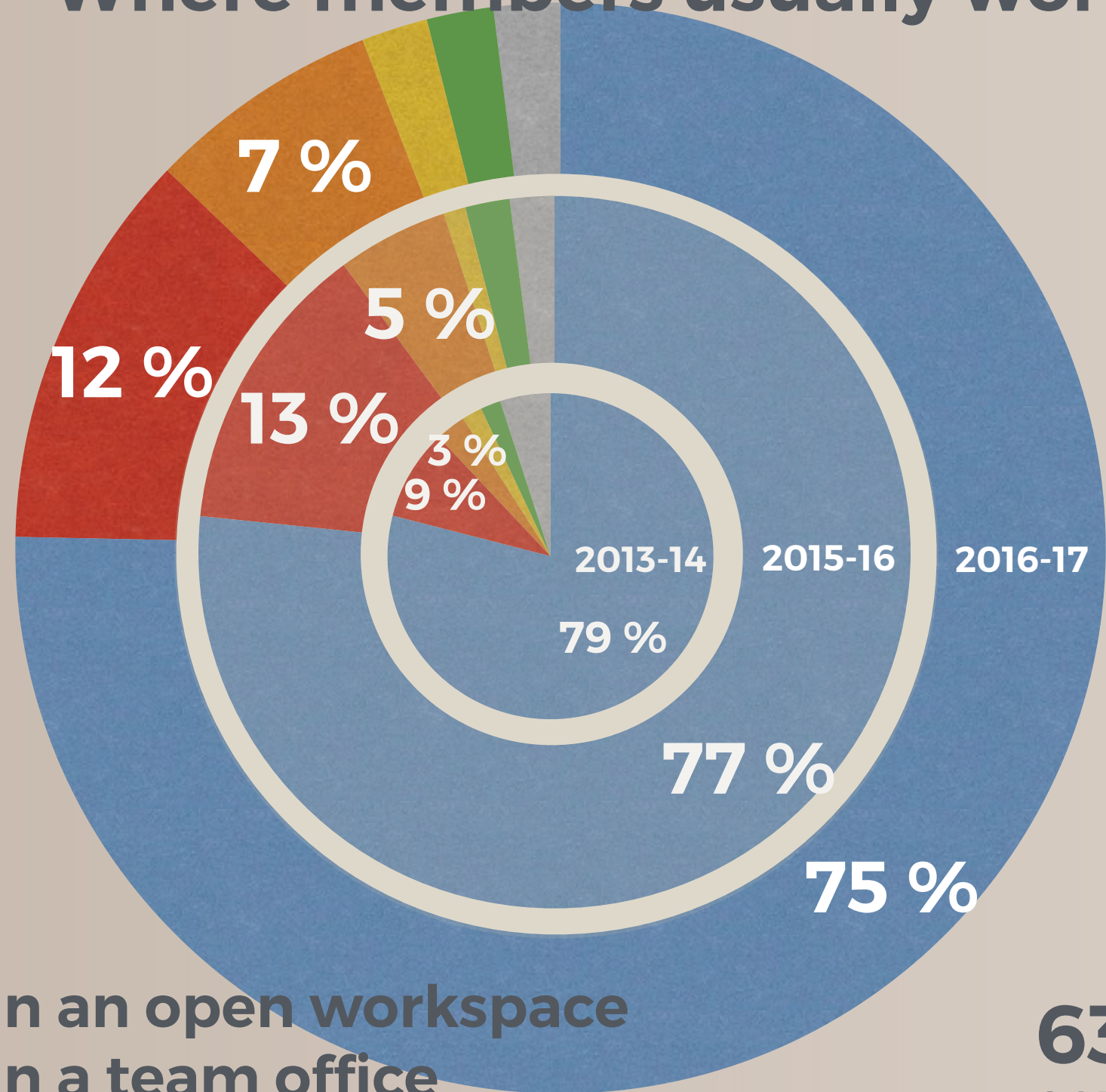
Flex desk



Percentage of open space reported by coworking spaces

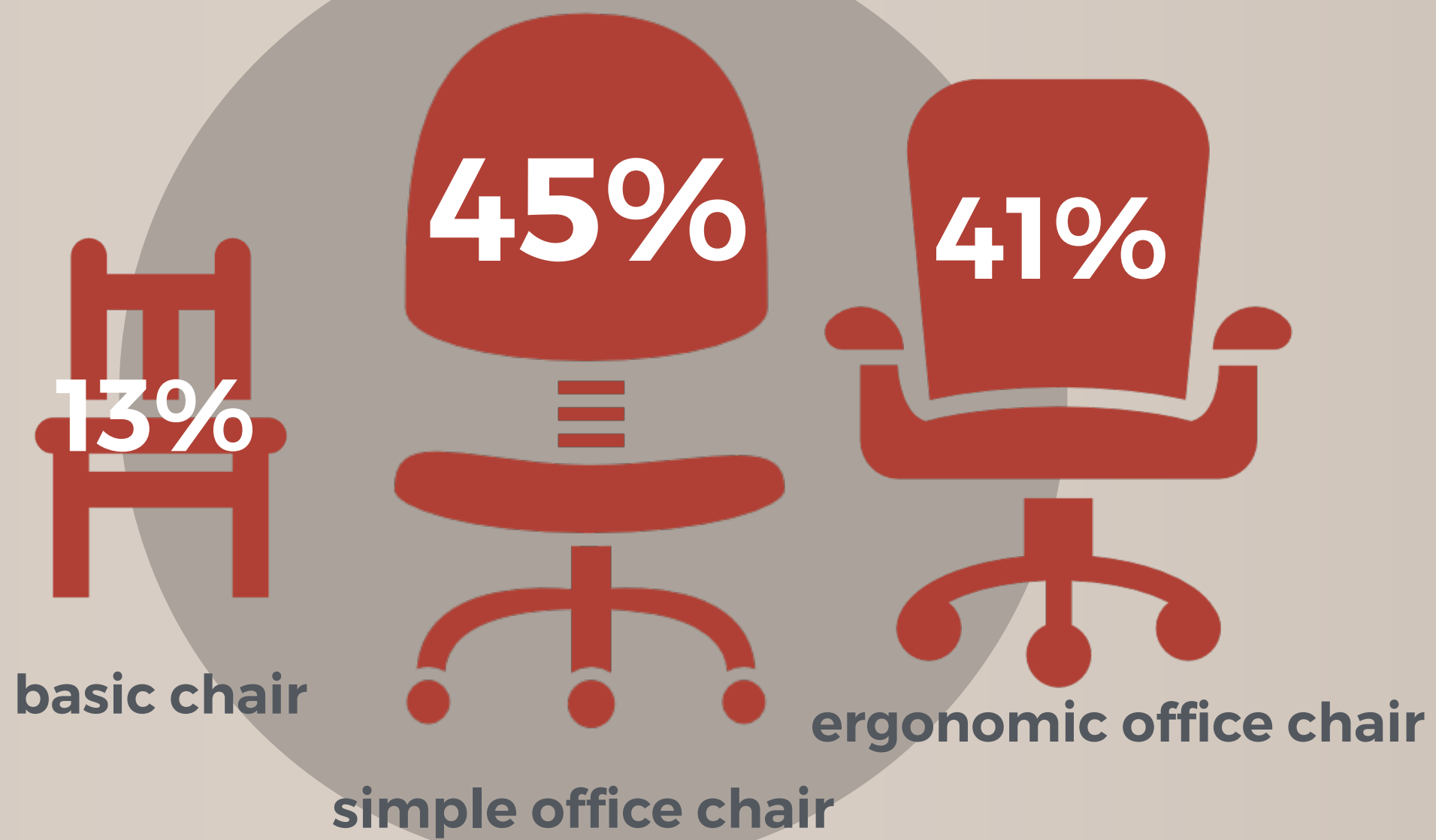


Where members usually work



- In an open workspace
- In a team office
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- In a meeting room
- Other

Type of chair when sitting



Flex desk

63% ↓ 53%

2013-14 2016-17

4%

WORK ALWAYS
AT A STANDING
DESK.
11% OFTEN.

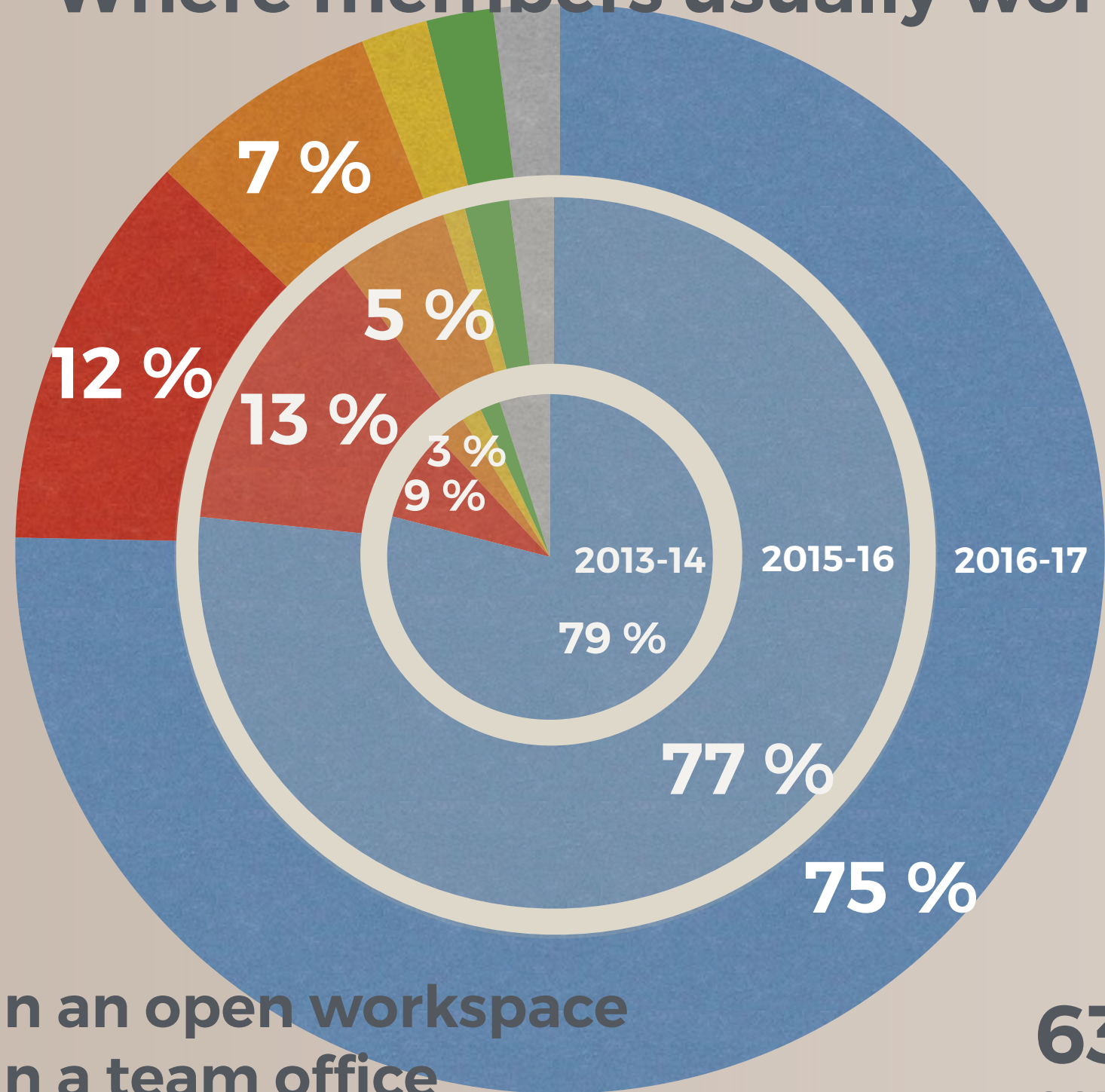
Percentage of open space reported by coworking spaces

60%
2013-14

49%
2015-16

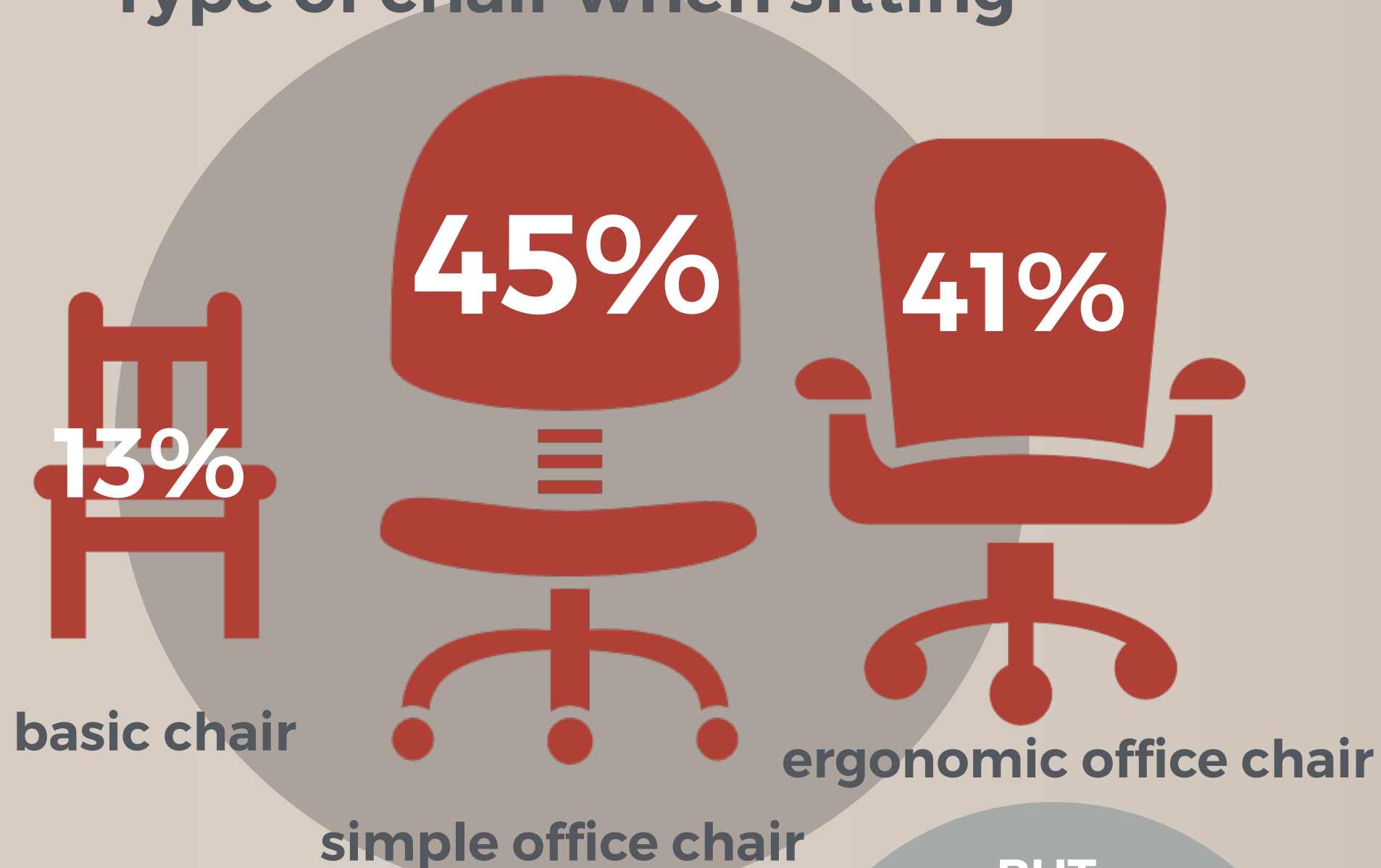
48%
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BUT

76%!

WOULD
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CHAIR

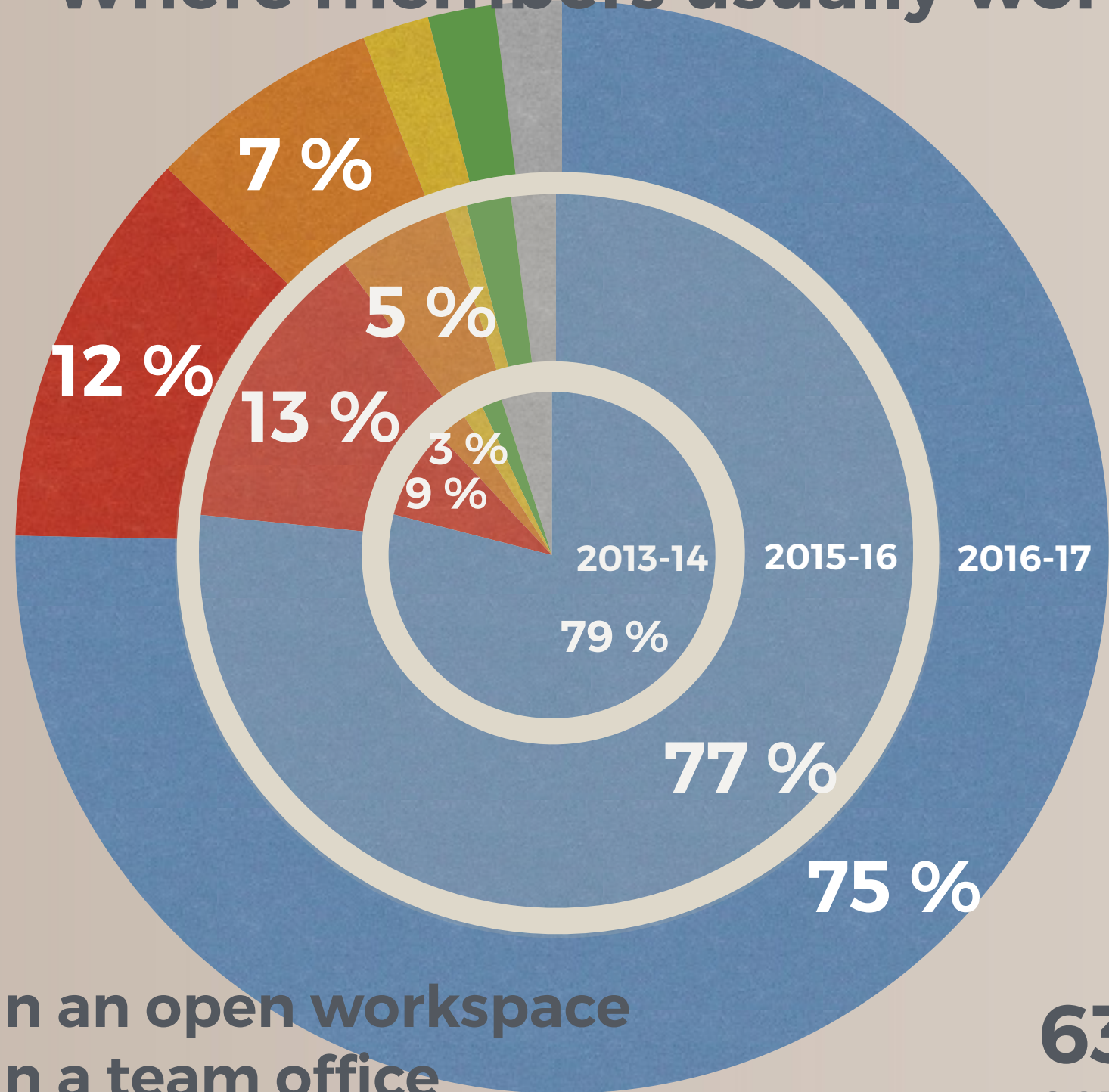
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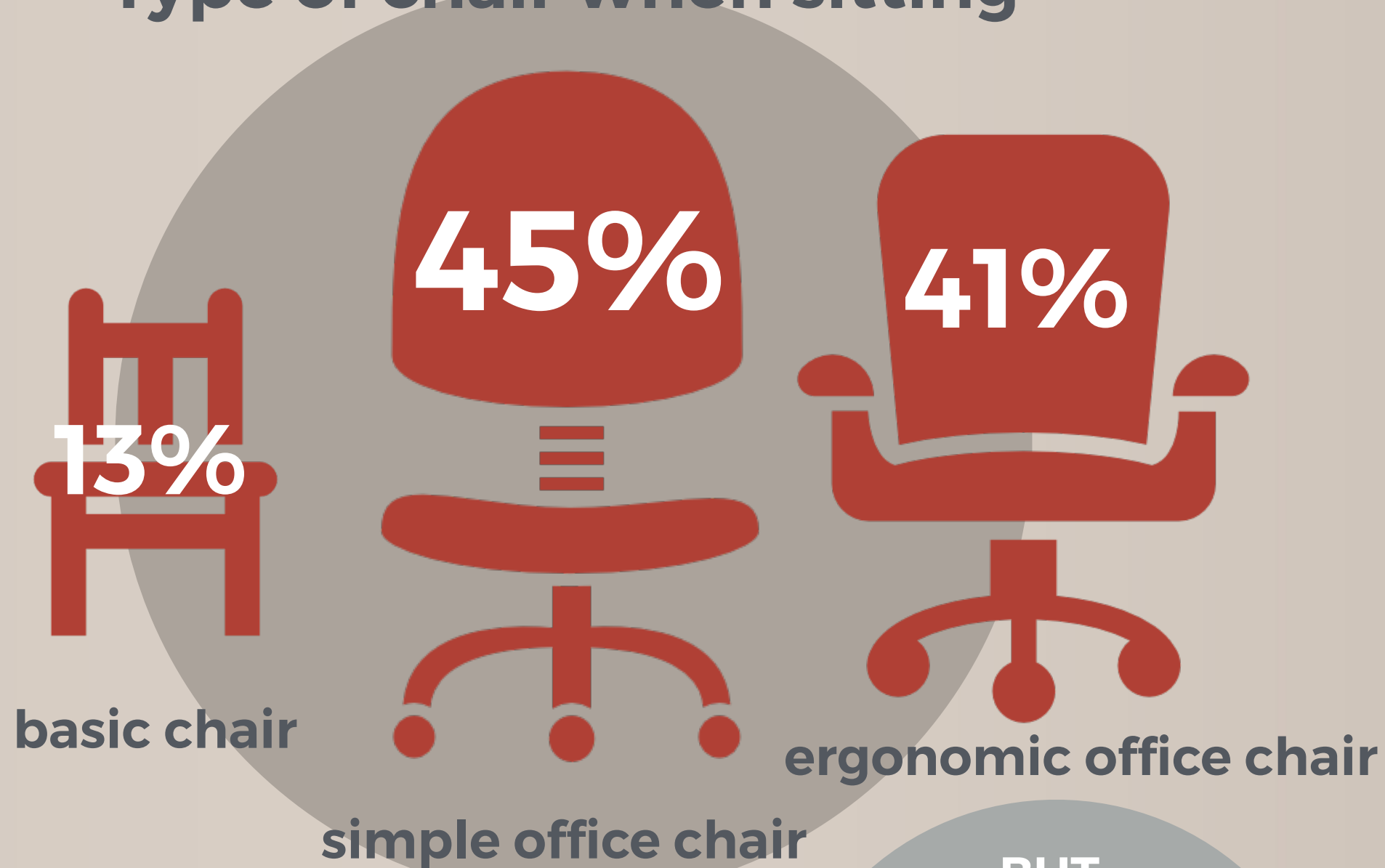
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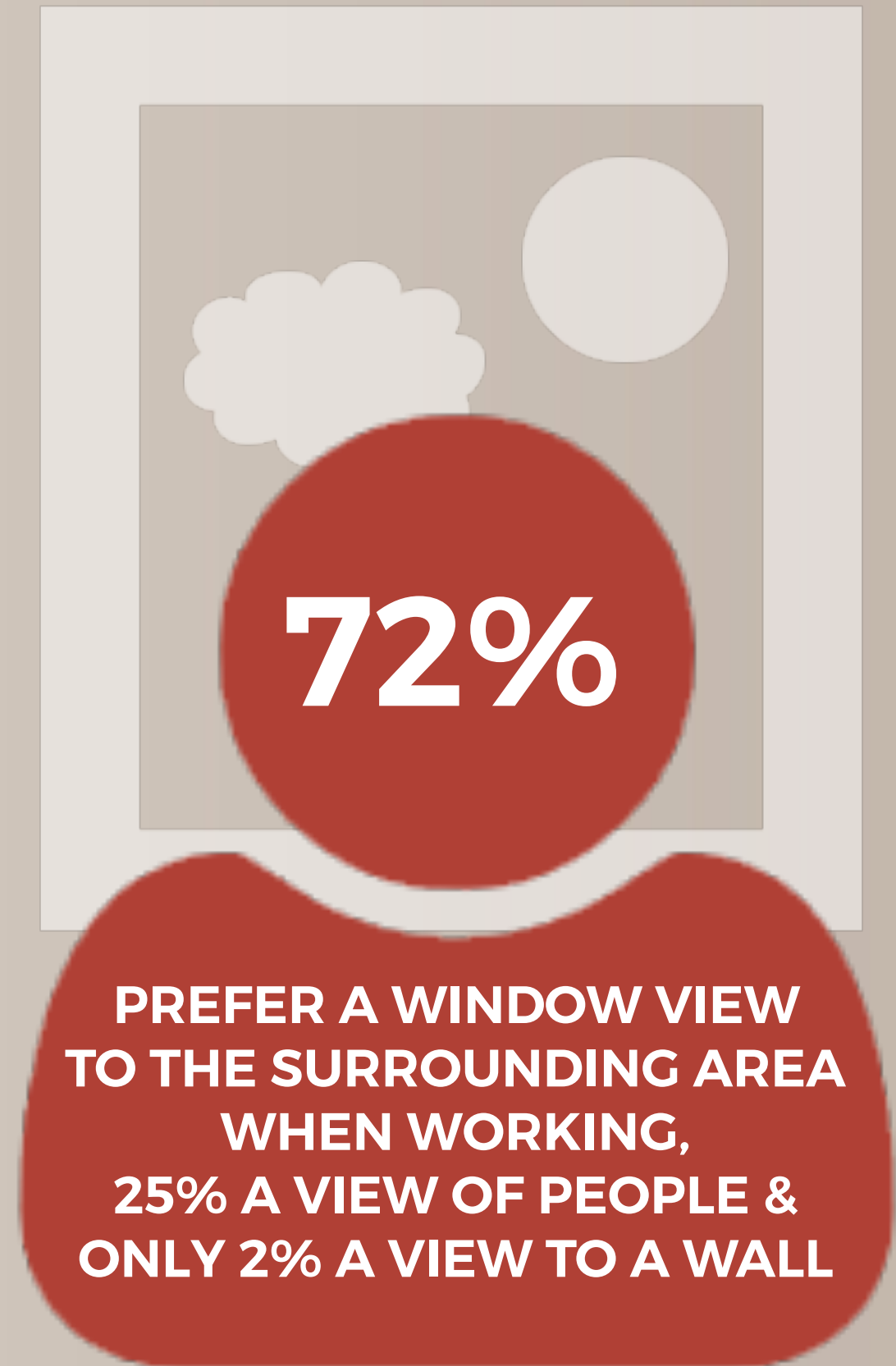
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48%
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work on their own,
not in teams

55%
2016-17

56%
2015-16

61%
2013-14

“Almost all or many members
know my first name”

On average,
a member talks
with
5.2
other members
per day
2015/16: 5.3

66 %

56 %

2015-16

2016-17

55%
2016-17

work on their own,
not in teams

56%
2015-16

61%
2013-14

71%
of members
collaborated
with other
members
within the last
twelve months

29%
did not

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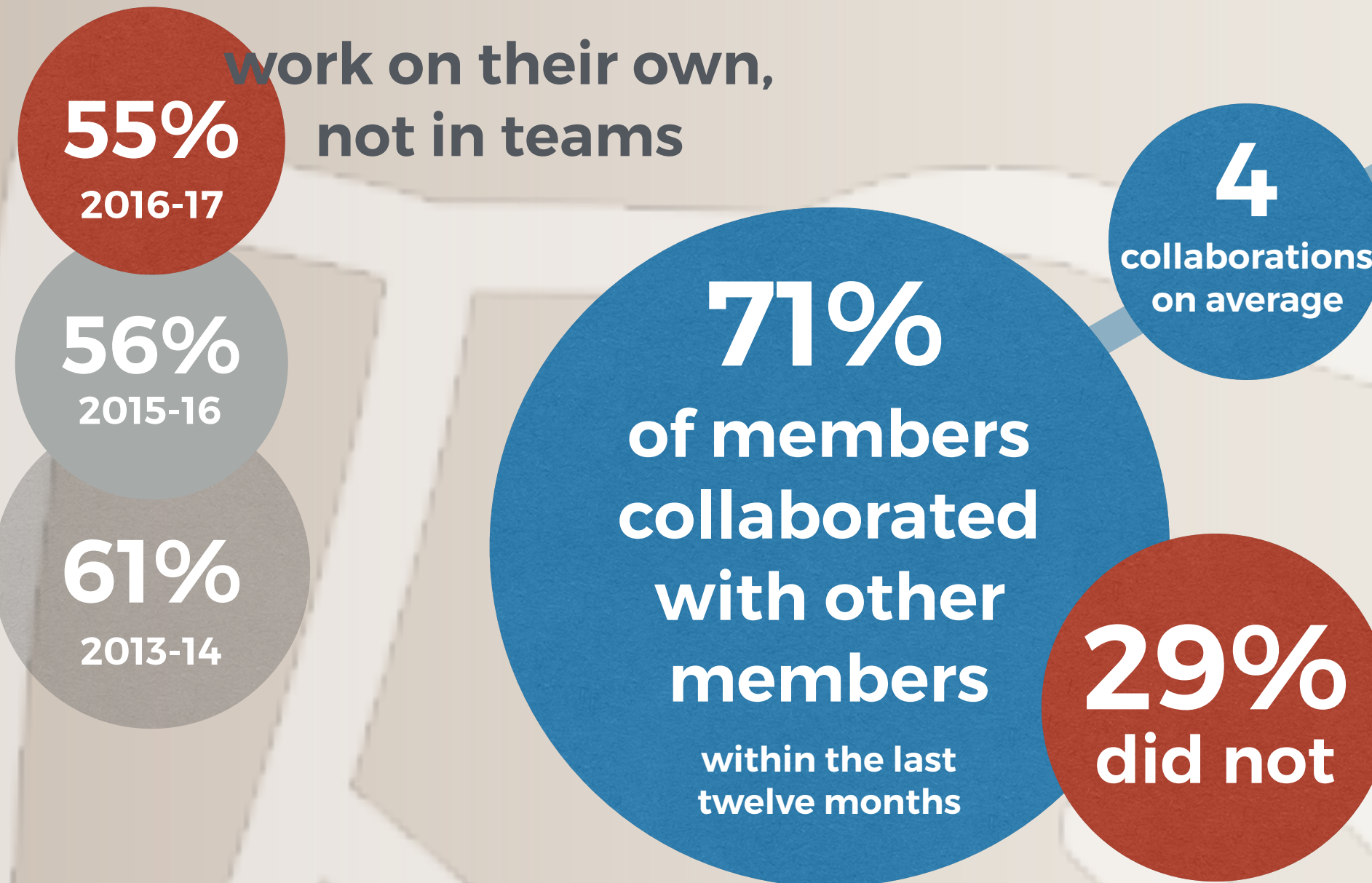
66 %

2015-16

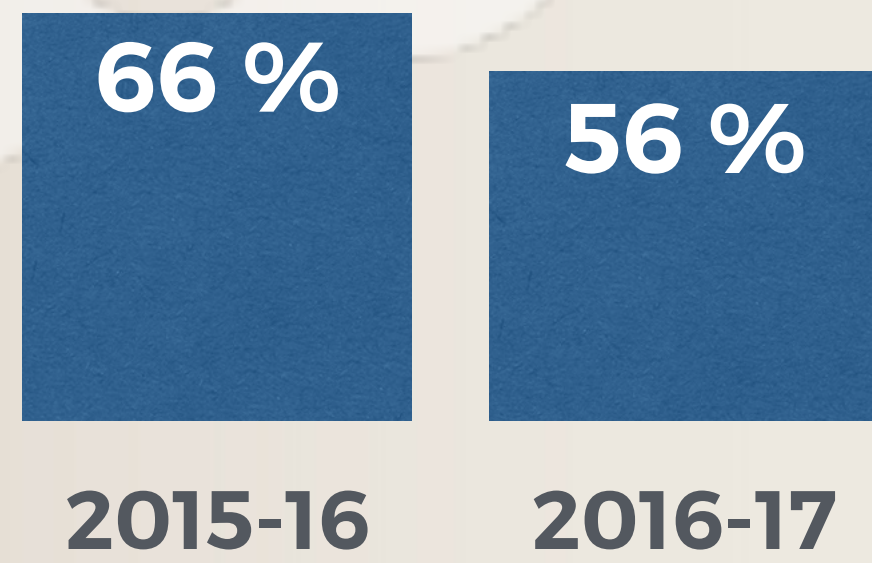
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2016-17

Type of collaboration within the last twelve months



“Almost all or many members know my first name”



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2016-17

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within the last
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29%
did not

4

collaborations
on average

Partnering on a project without contracts

Contracting a project

Hiring an employee

Forming a company or new business

Small task

76 %

42 %

27 %

5 %

11 %

“Almost all or many members
know my first name”

66 %

56 %

2015-16

2016-17

On average,
a member talks
with
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Coworking
Spaces receive

11

job requests for
their members from
non-members
per month
on average

but...

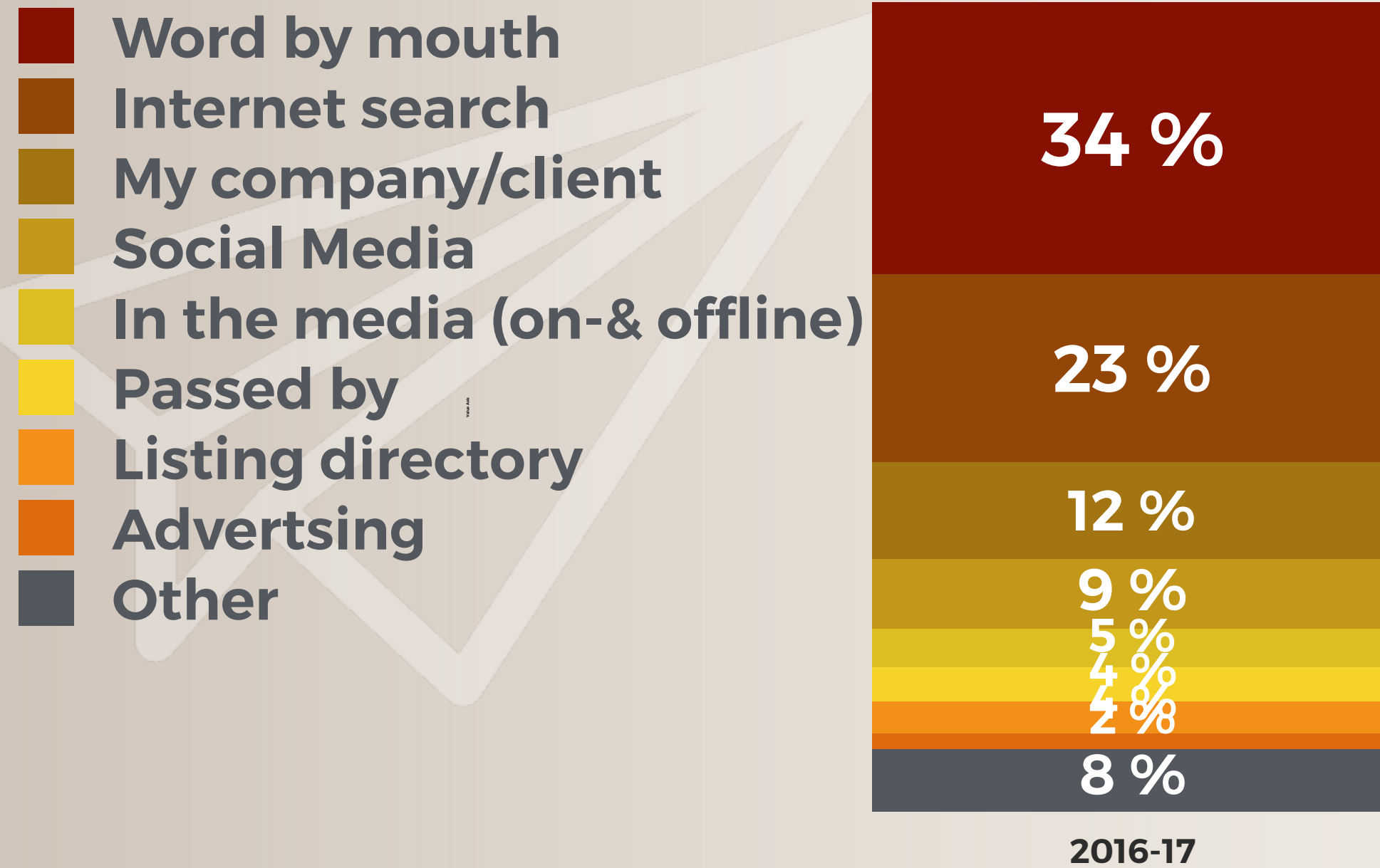
1 in 5

doesn't get any
request.

IN COLLABORATION WITH

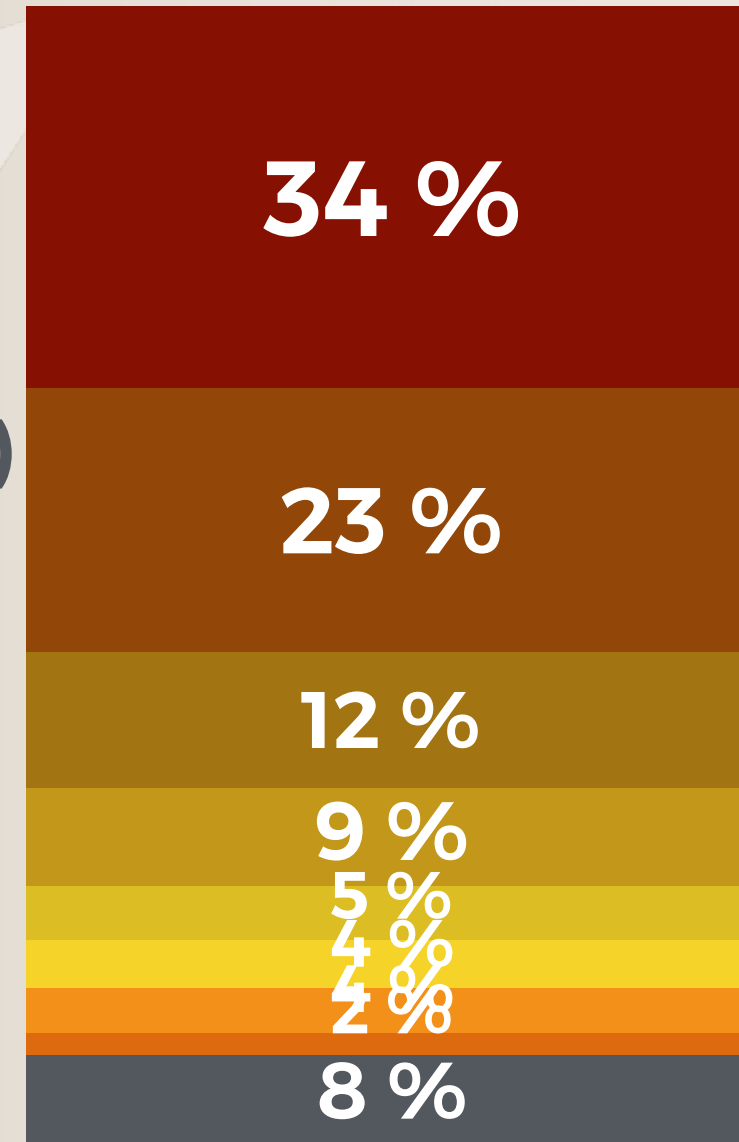
SOCIAL
WORKPLACES.com

How members found their coworking space before becoming a member



How members found their coworking space before becoming a member

- Word by mouth
- Internet search
- My company/client
- Social Media
- In the media (on-& offline)
- Passed by
- Listing directory
- Advertsing
- Other



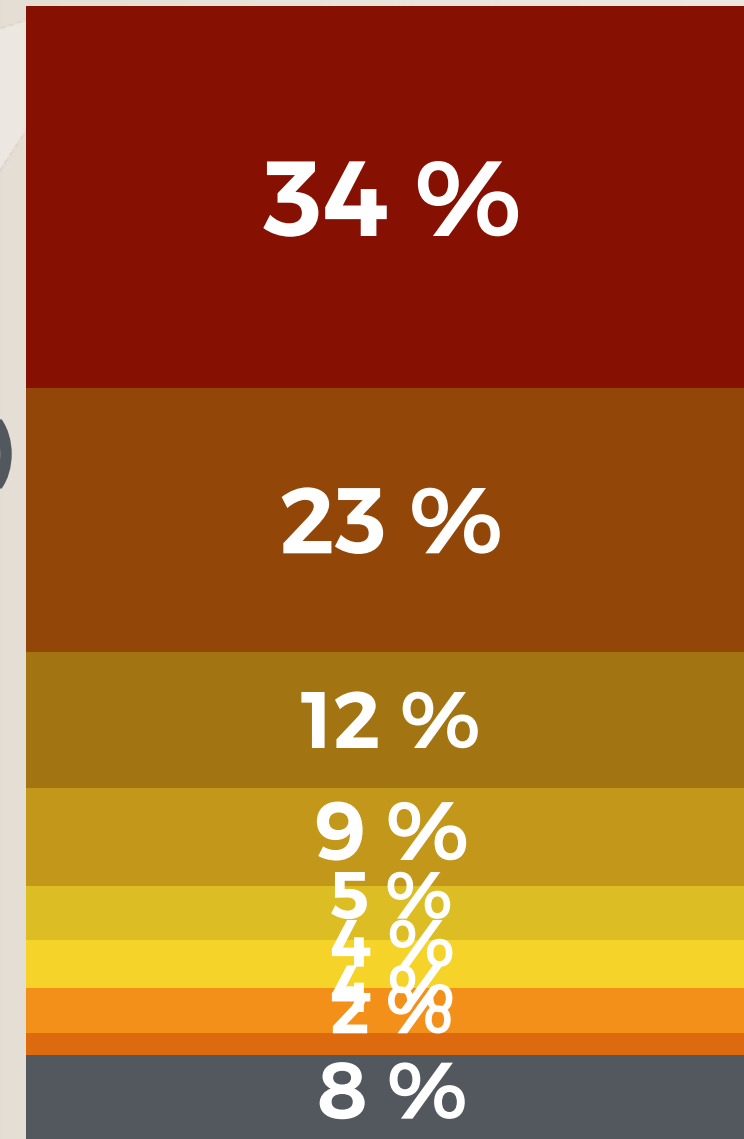
2016-17

Who pays for the membership



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2016-17

Coworking Spaces Rated By Their Members

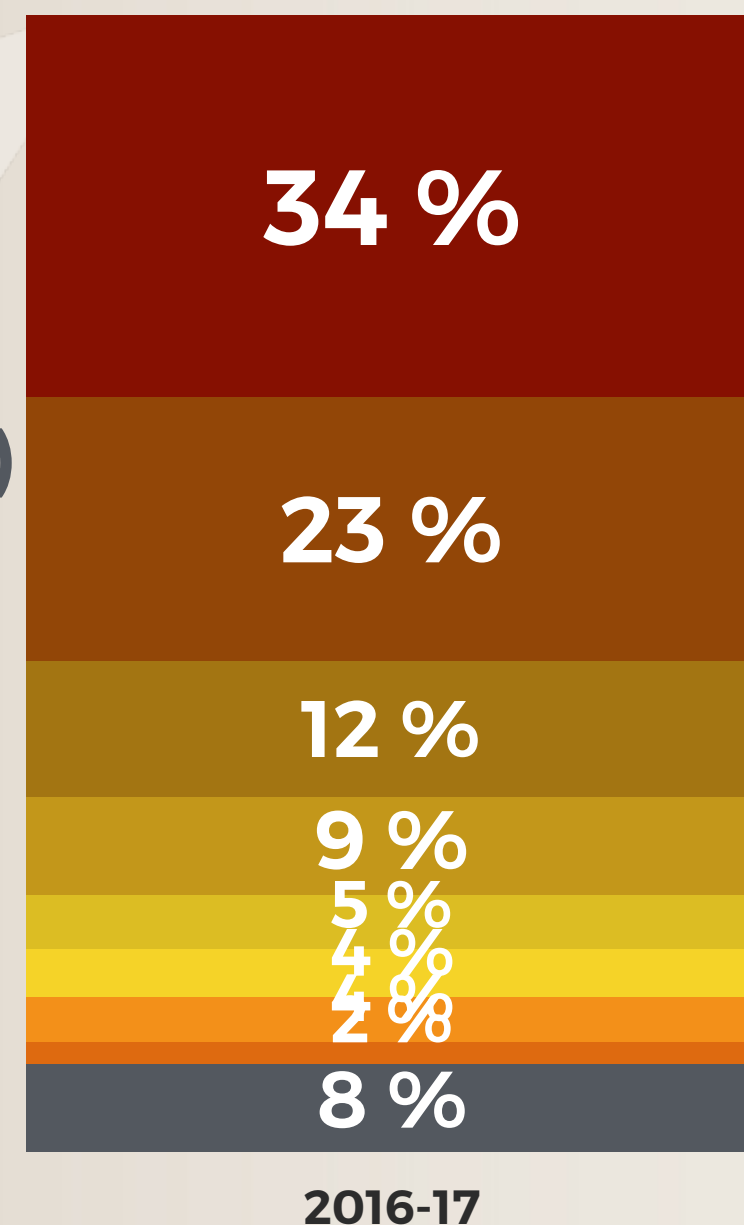


Who pays for the membership



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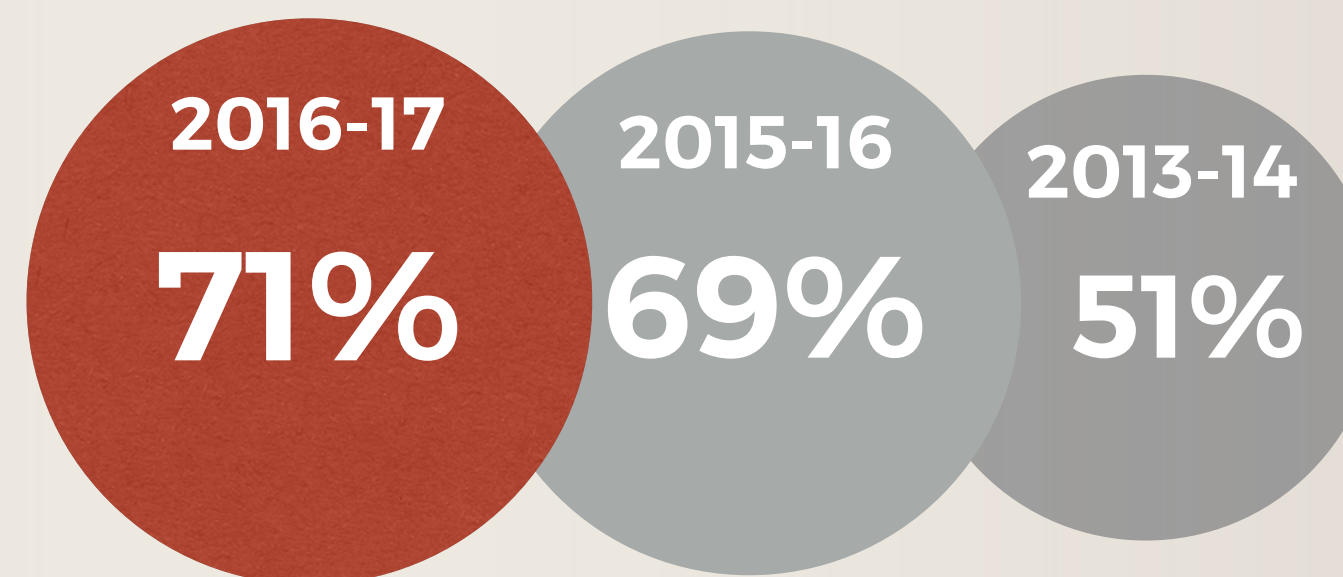
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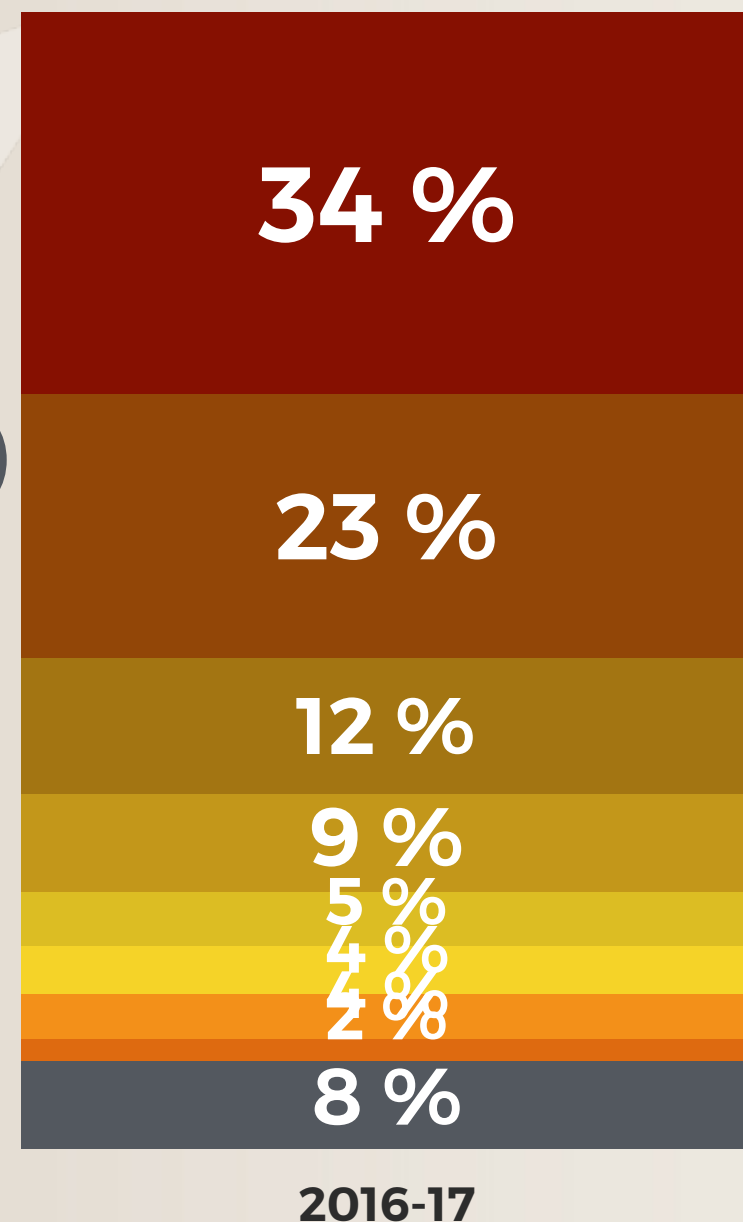
Who pays for the membership



work at a coworking space three times a week or more often, 41% come every day

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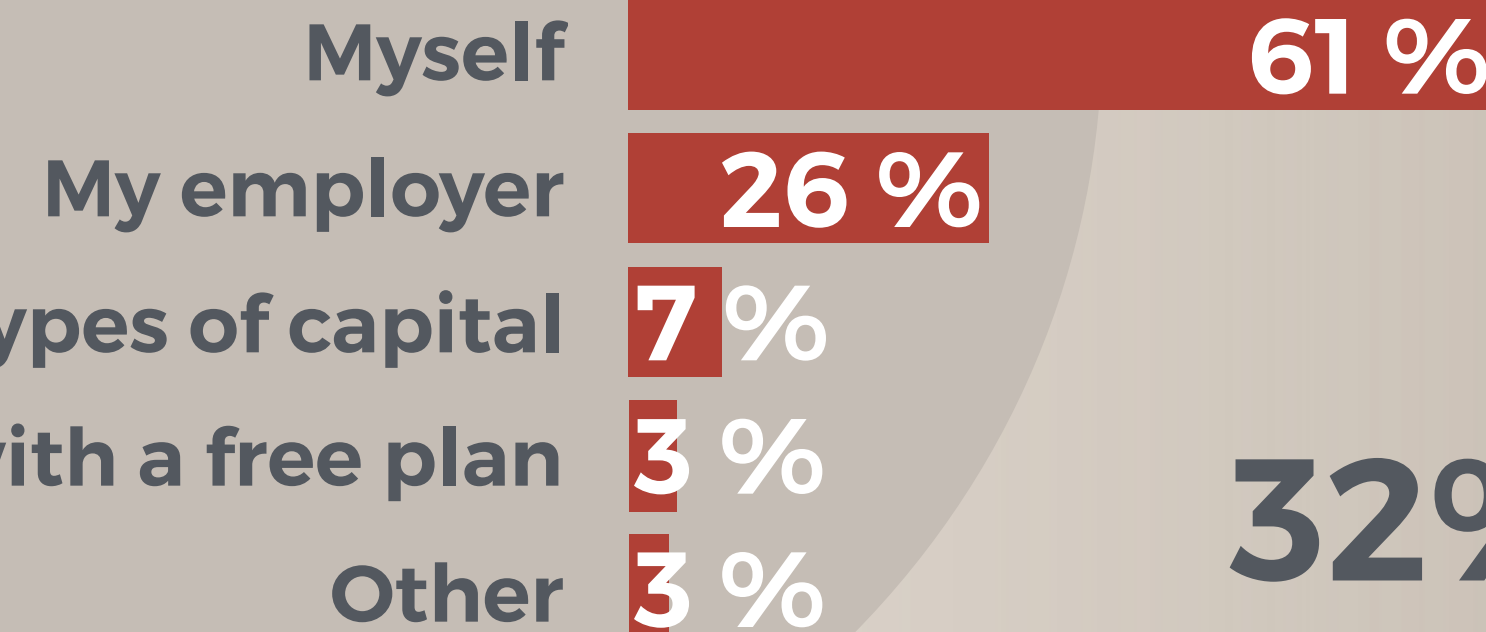
Coworking Spaces Rated By Their Members



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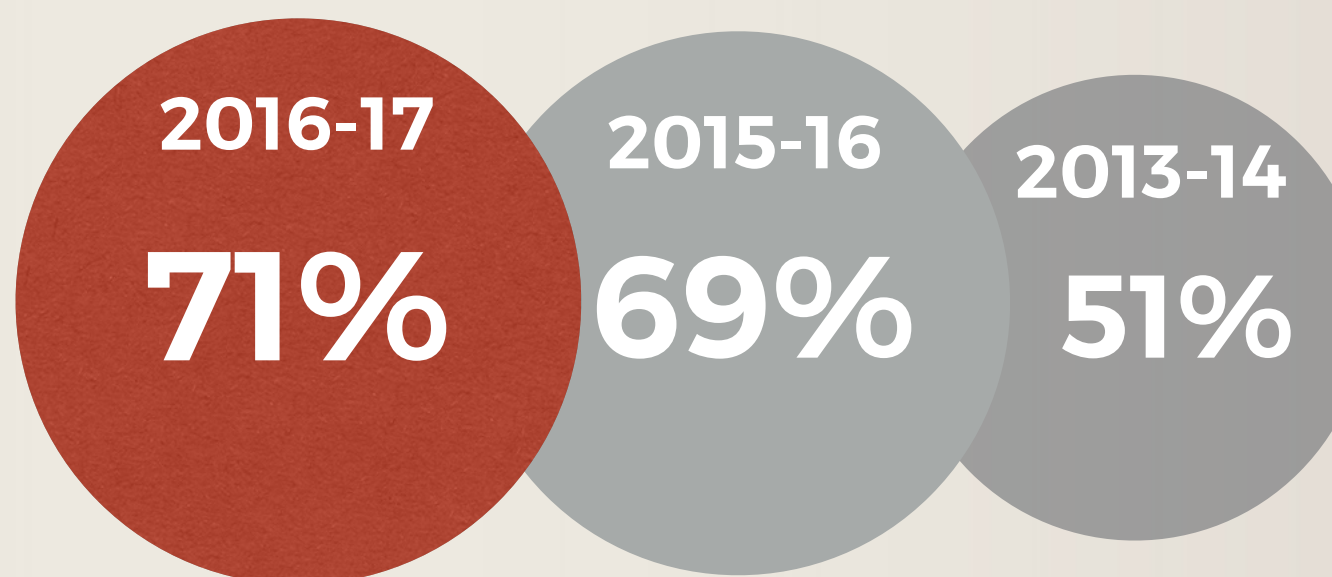
I pay with other types of capital
It's a membership with a free plan



32%
of members
work more than 2 weeks
per year abroad

44%
of them would describe
themselves as
a Digital Nomad

14%
of members are
Digital Nomads
who also work abroad



work at a coworking space
three times a week or more often,
41% come every day

In 2017,

67%

In 2016,

62%

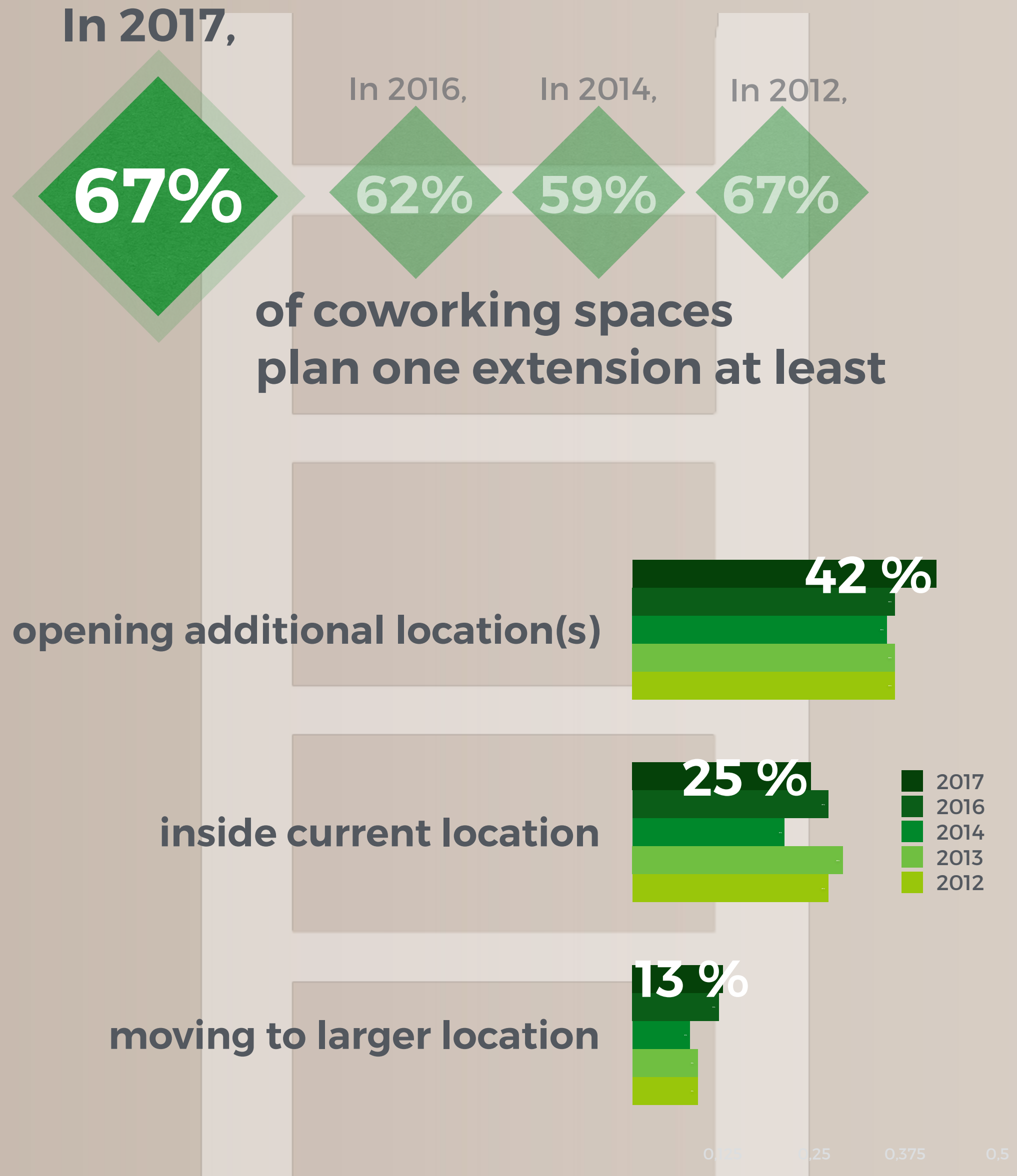
In 2014,

59%

In 2012,

67%

of coworking spaces
plan one extension at least



REPORTED BY COWORKING SPACES - 2016/17: BASED ON FIRST RESULTS - ALL OTHER YEARS ARE BASED ON FINAL RESULTS

In 2017,

67%

In 2016,

62%

In 2014,

59%

In 2012,

67%

of coworking spaces plan one extension at least

opening additional location(s)

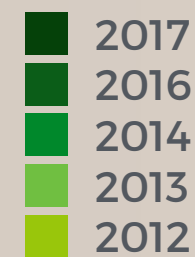
42%

inside current location

25%

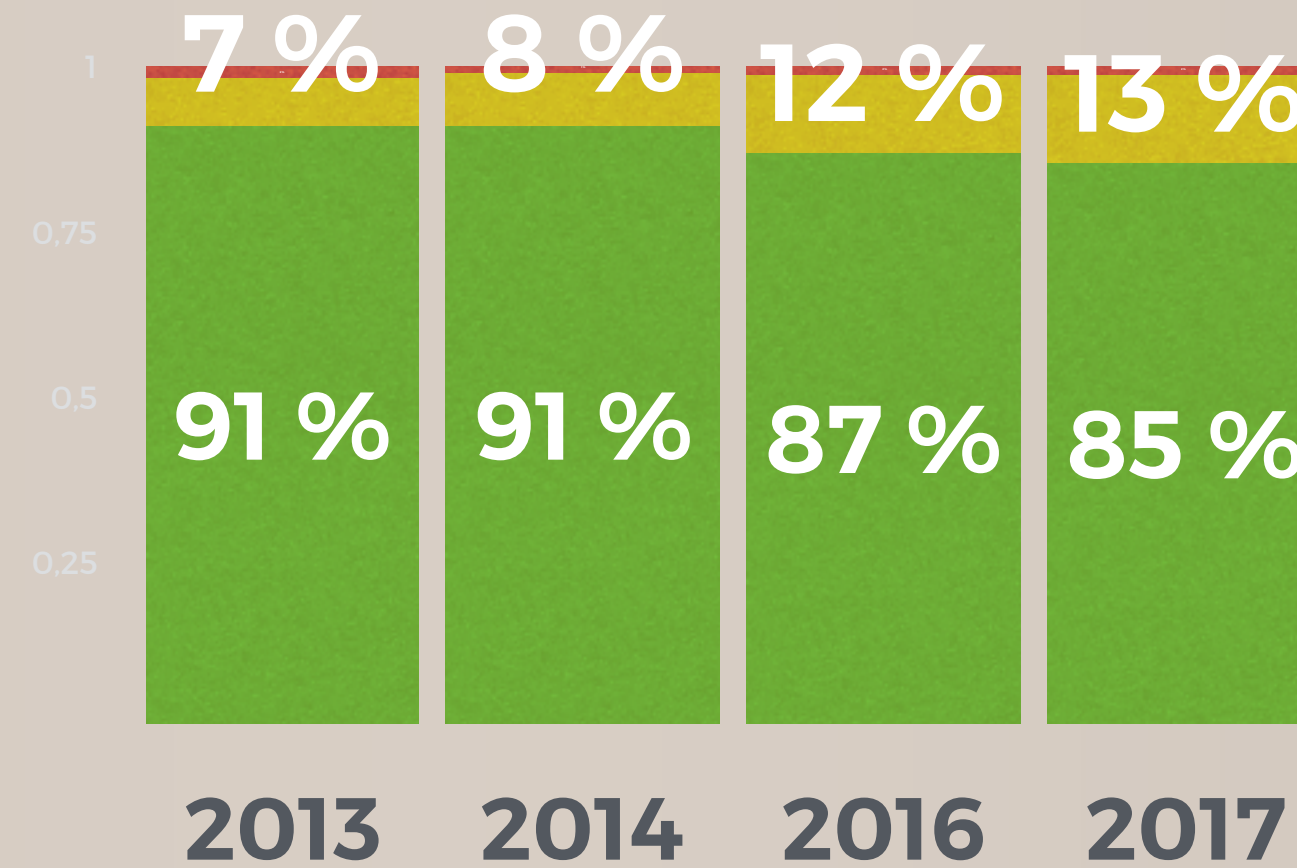
moving to larger location

13%

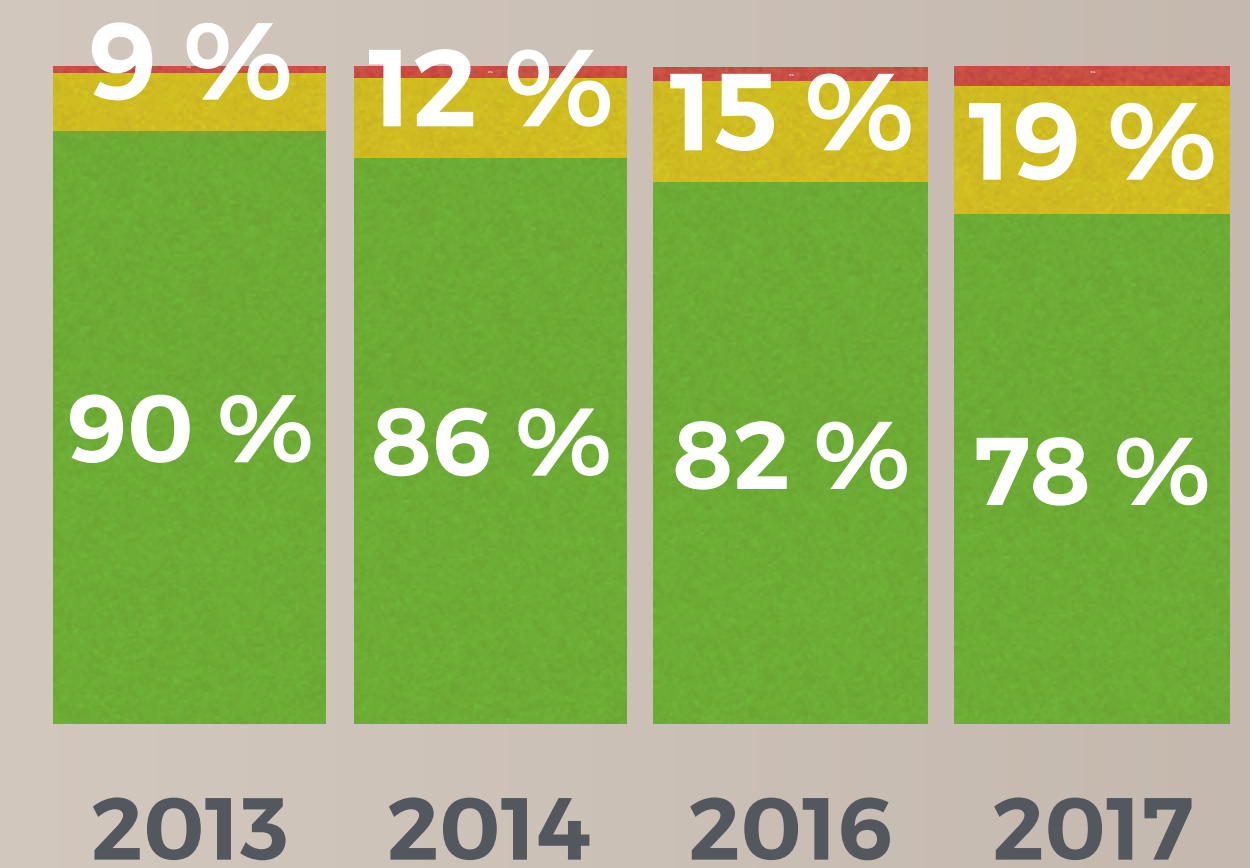


What coworking spaces expect for the next year

Number of members



Amount of income



■ Increasing ■ No change ■ Decreasing

In 2017,

67%

In 2016,

62%

In 2014,

59%

In 2012,

67%

of coworking spaces plan one extension at least

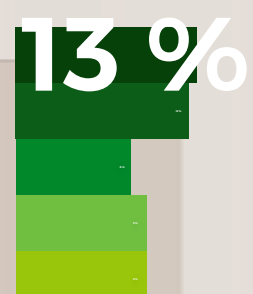
opening additional location(s)



inside current location

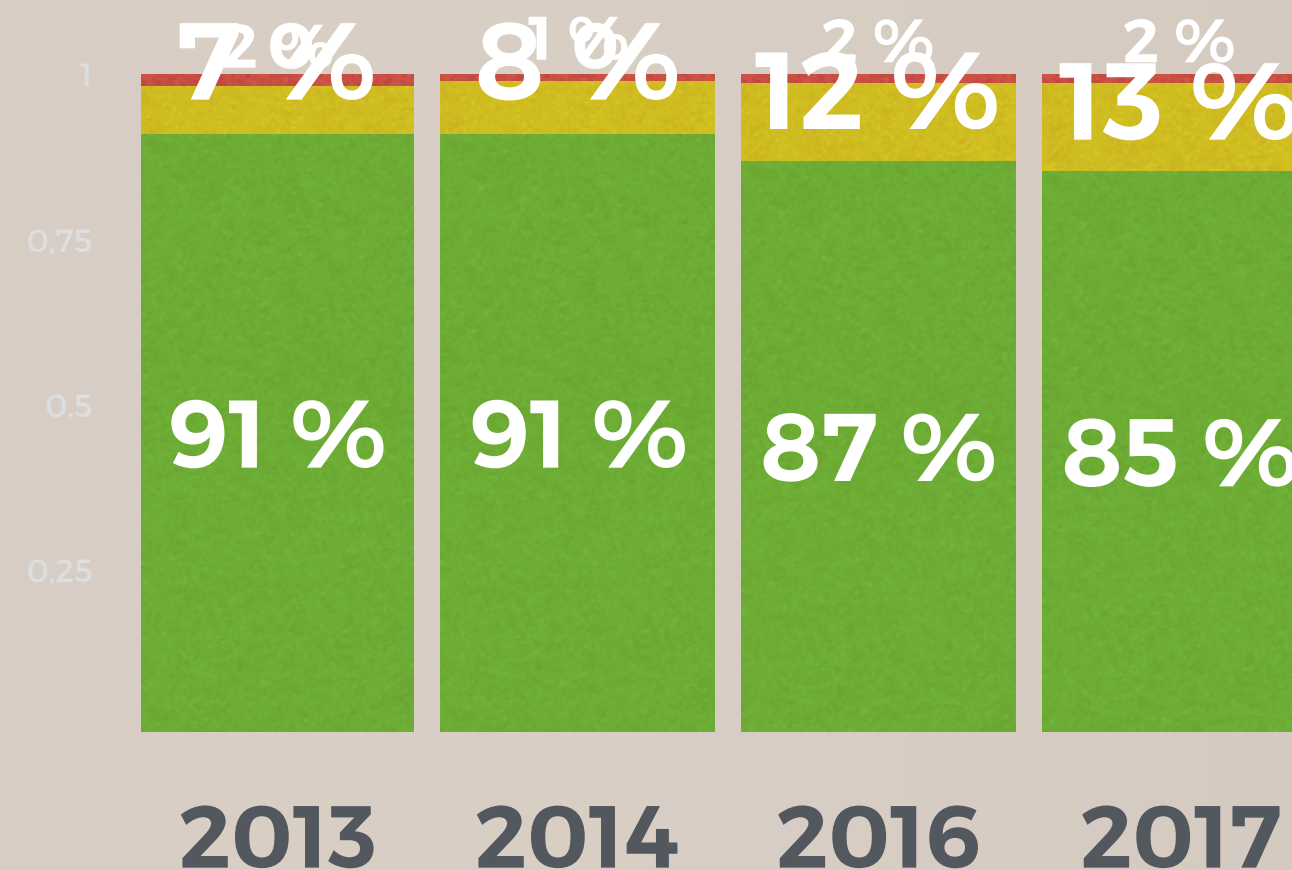


moving to larger location

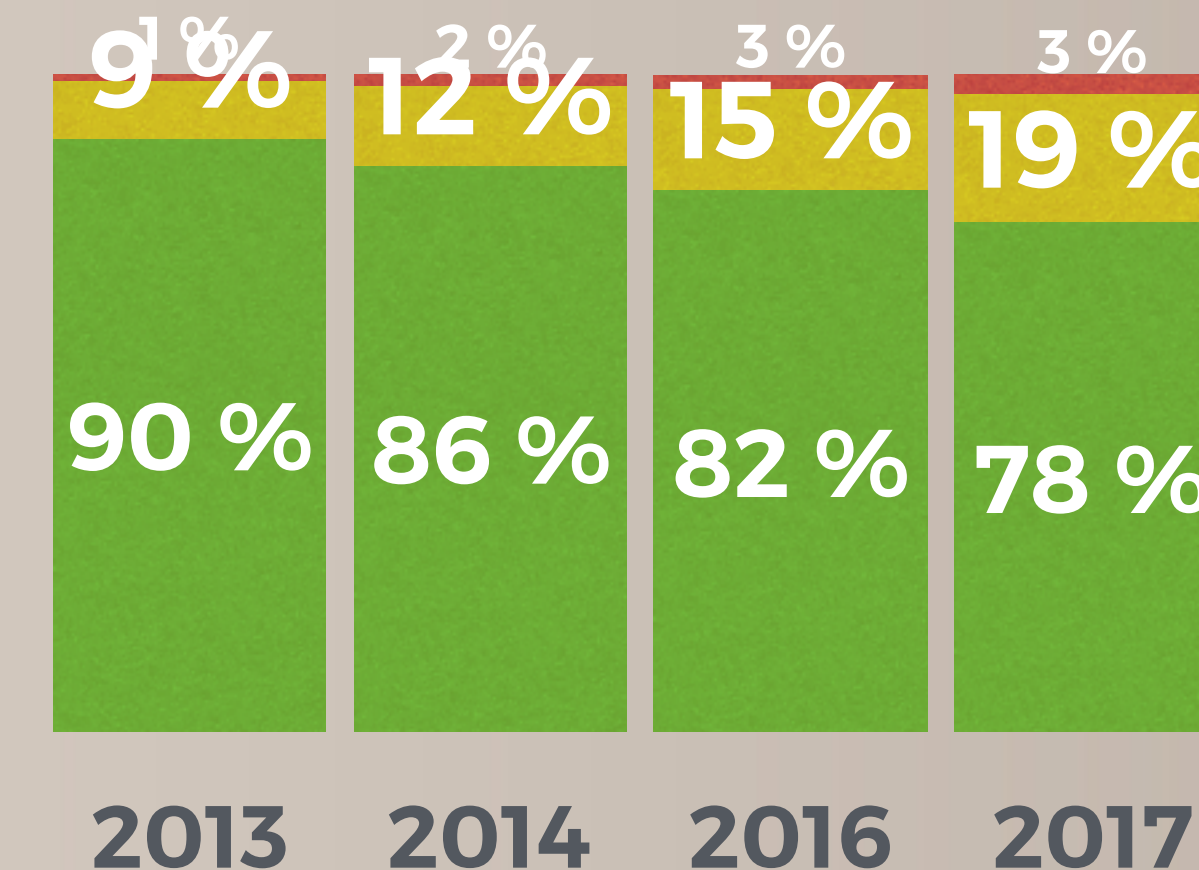


What coworking spaces expect for the next year

Number of members

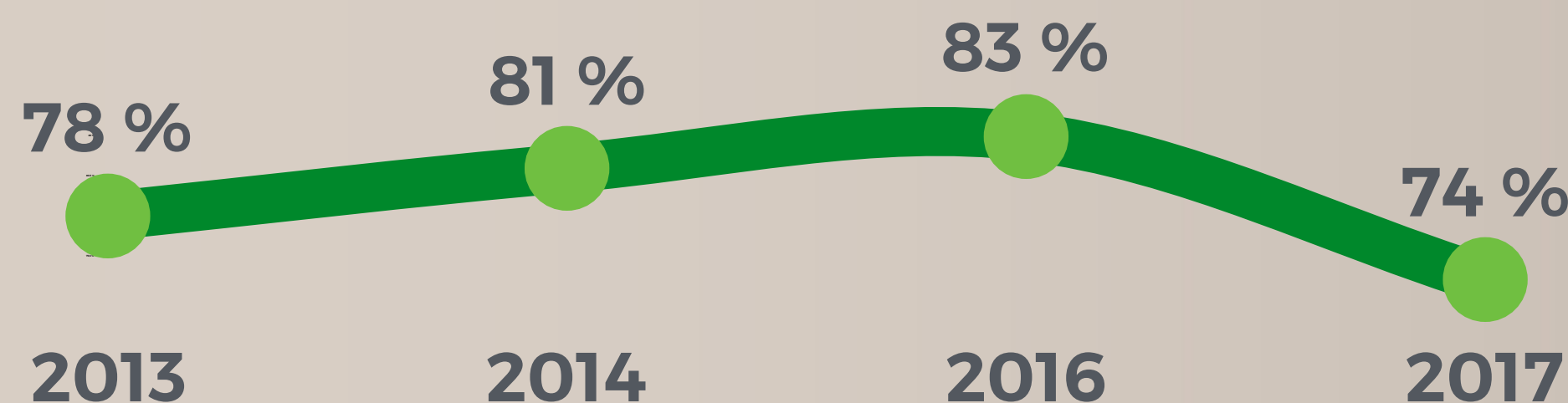


Amount of income



Increasing No change Decreasing

Share of members who plan to remain for at least one year, or don't plan to leave



COLLABORATION PARTNER



MAIN SUPPORTERS



OFFICIAL SUPPORTERS



SUPPORT THE GLOBAL COWORKING SURVEY

The Global Coworking Survey 2017

**COWORKING?
HAVE YOUR SAY!**

COWORKINGSURVEY.COM

YOUR VOICE COUNTS.

Thanks for listening!

deskmag