

deskmag

FIRST RESULTS OF THE

2017 Global Coworking Survey



THE SURVEY IS STILL RUNNING.
TAKE THE SURVEY HERE.

IN COLLABORATION WITH

S()CIAL
WORKPLACES.com

THE INDEPENDENT ANALYSIS OF THE SURVEY IS SUPPORTED BY

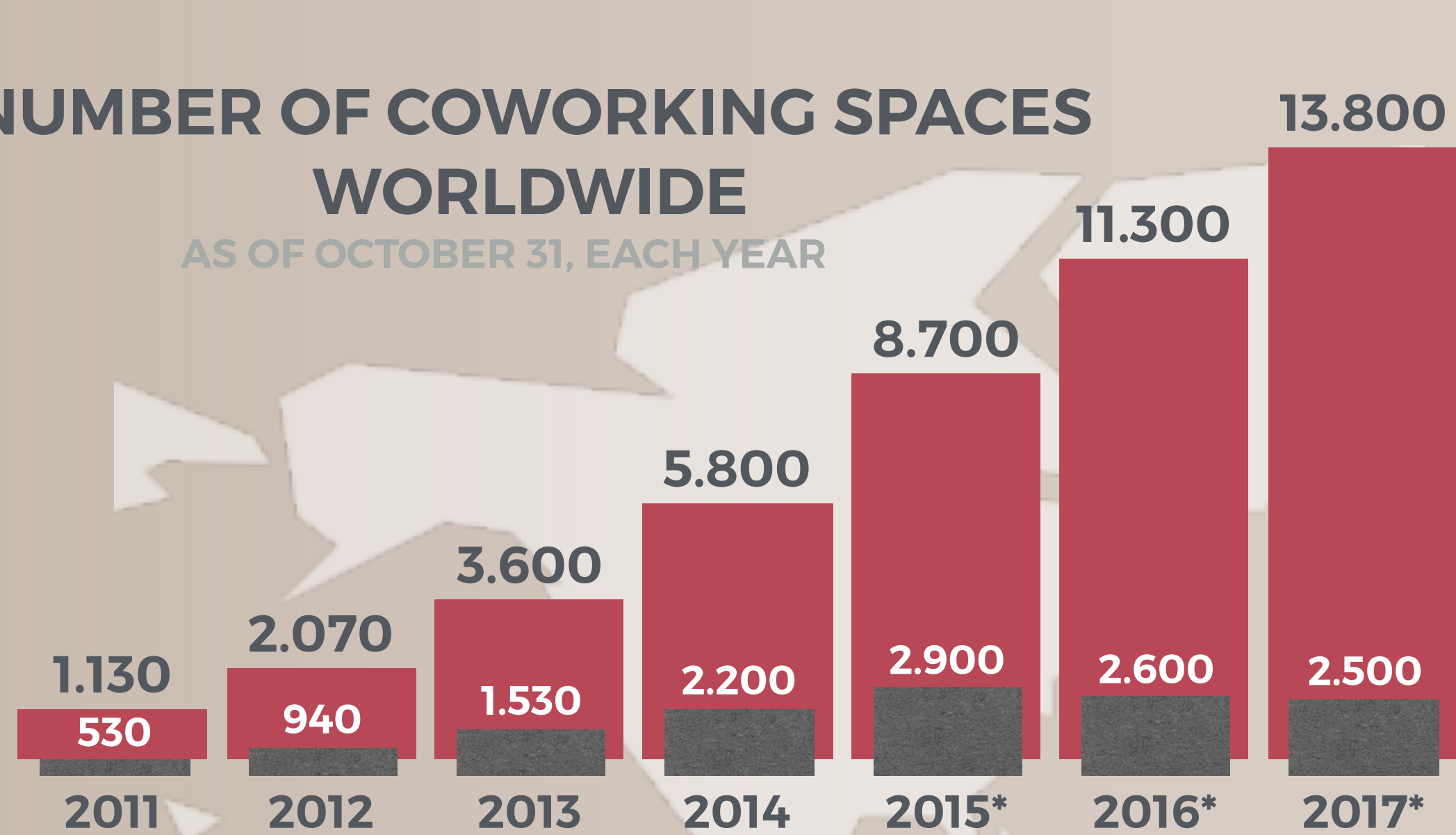
NEXUDUS

essensys

communitas^{co}

NUMBER OF COWORKING SPACES WORLDWIDE

AS OF OCTOBER 31, EACH YEAR

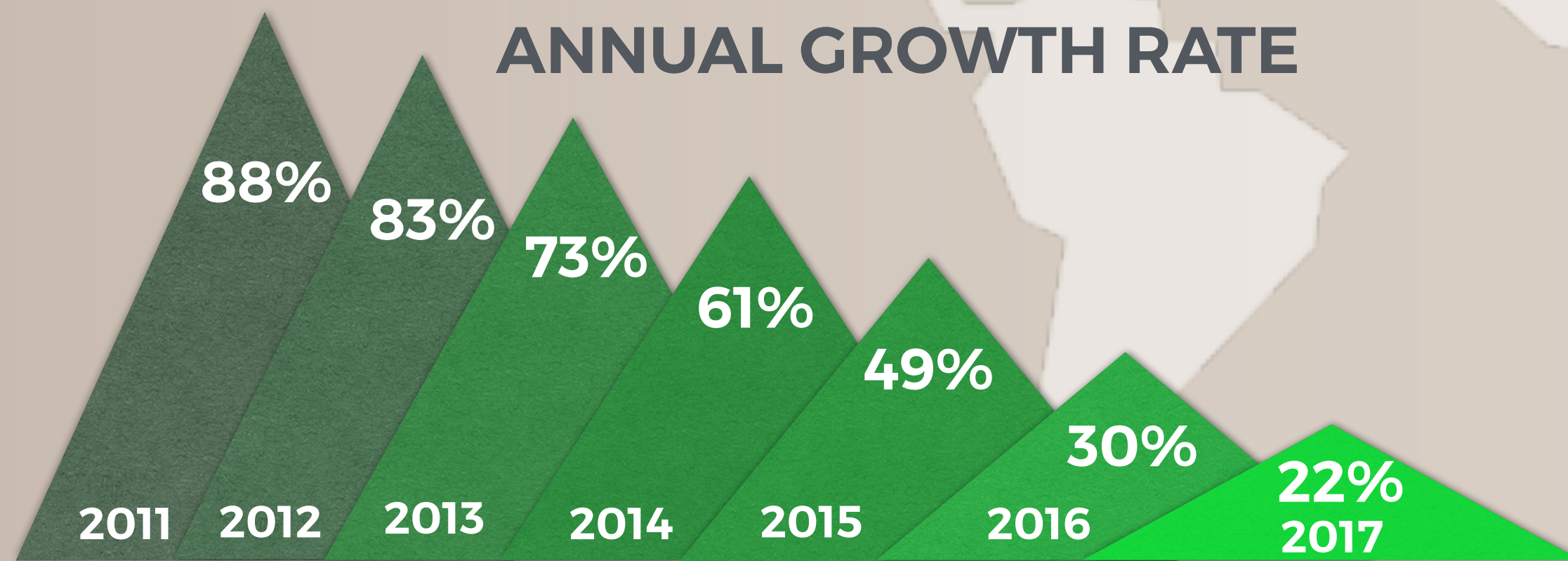


NUMBER OF MEMBERS WORLDWIDE

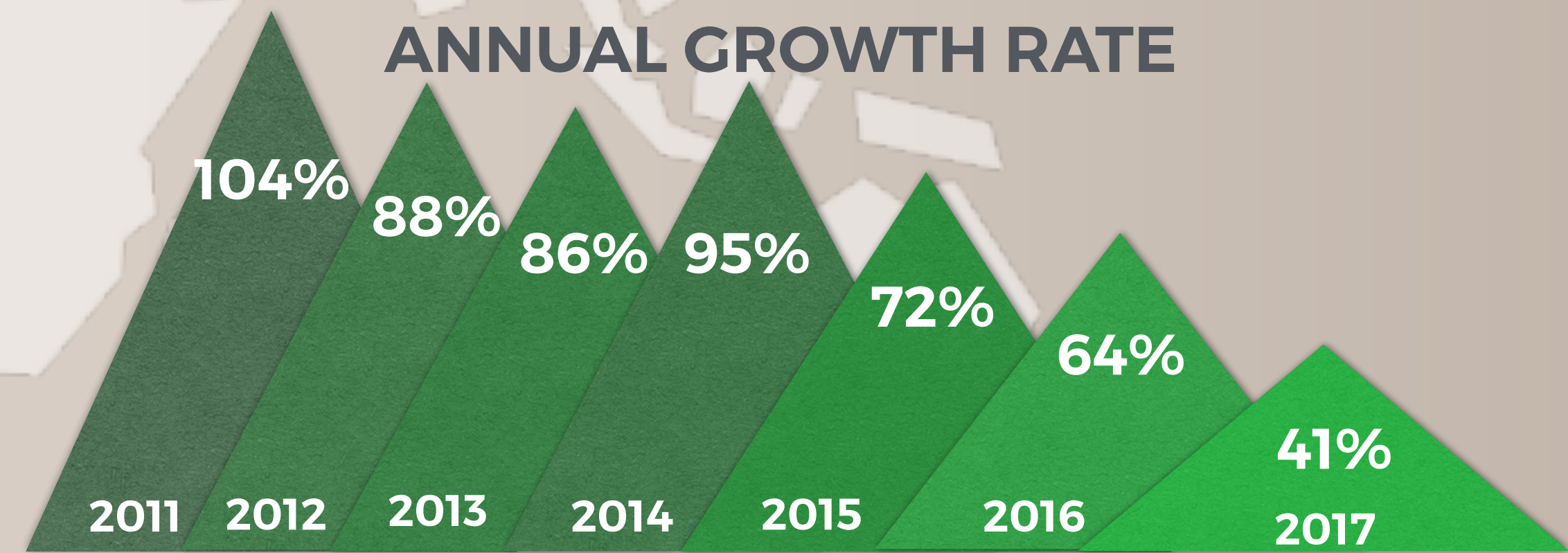
AS OF OCTOBER 31, EACH YEAR



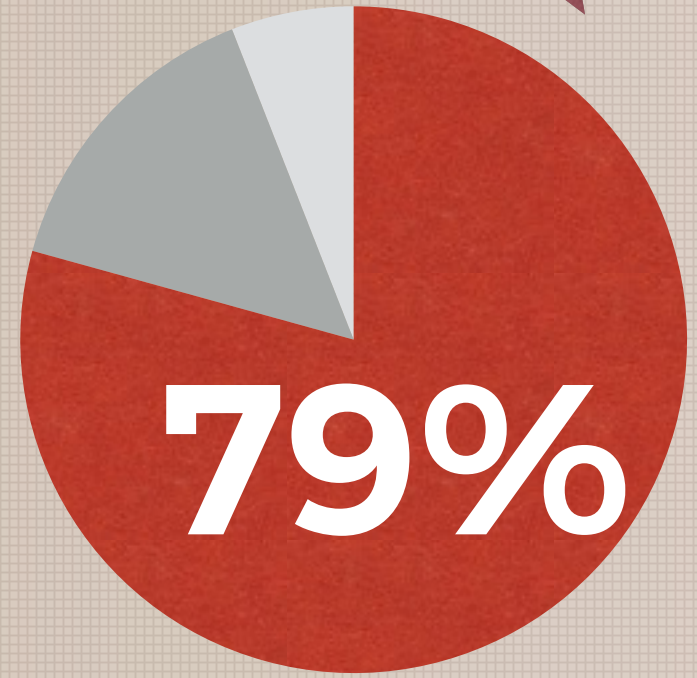
ANNUAL GROWTH RATE



ANNUAL GROWTH RATE



*PROJECTION – THE PROJECTION IS BASED ON THE SHARE OF NEW COWORKING SPACES IN THE LAST TWELVE MONTHS COMPARED TO ALL COWORKING SPACES. THE NUMBER OF MEMBERS IS BASED ON THE MIDDLE VALUE OF THE MEAN, MEDIAN AND MODE. THE PROJECTION FOR 2017 REFLECTS THE CURRENT DEVELOPMENT. LAST YEAR, DUE TO A TYPOGRAPHICAL ERROR, 7,800 COWORKING SPACES WERE PROJECTED FOR 2015. THE CORRECT PROJECTION WAS 8,700.

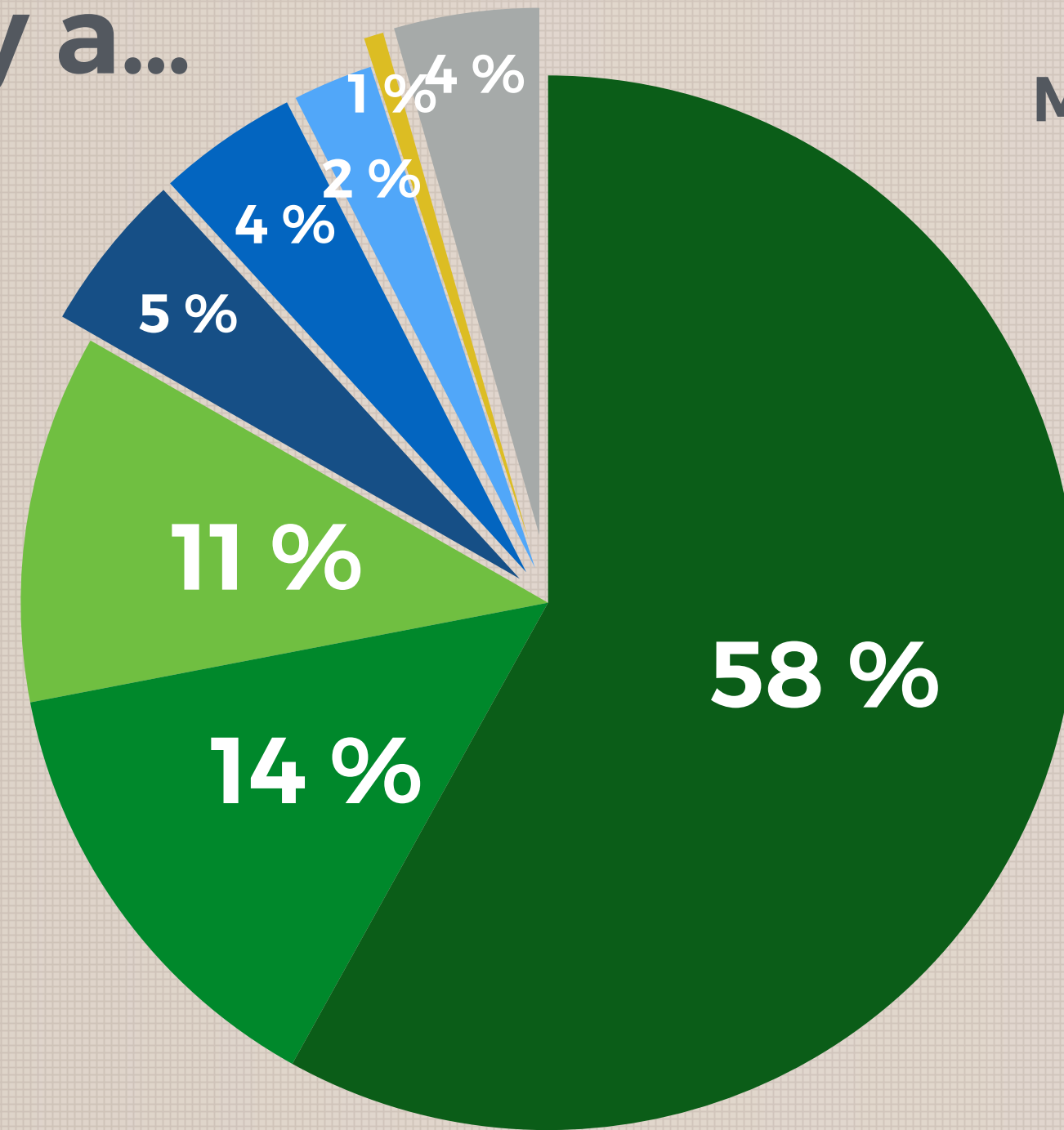


of coworking spaces say they are “more than just a coworking space”. 15% are fine with this description, and 6% can’t make a decision.

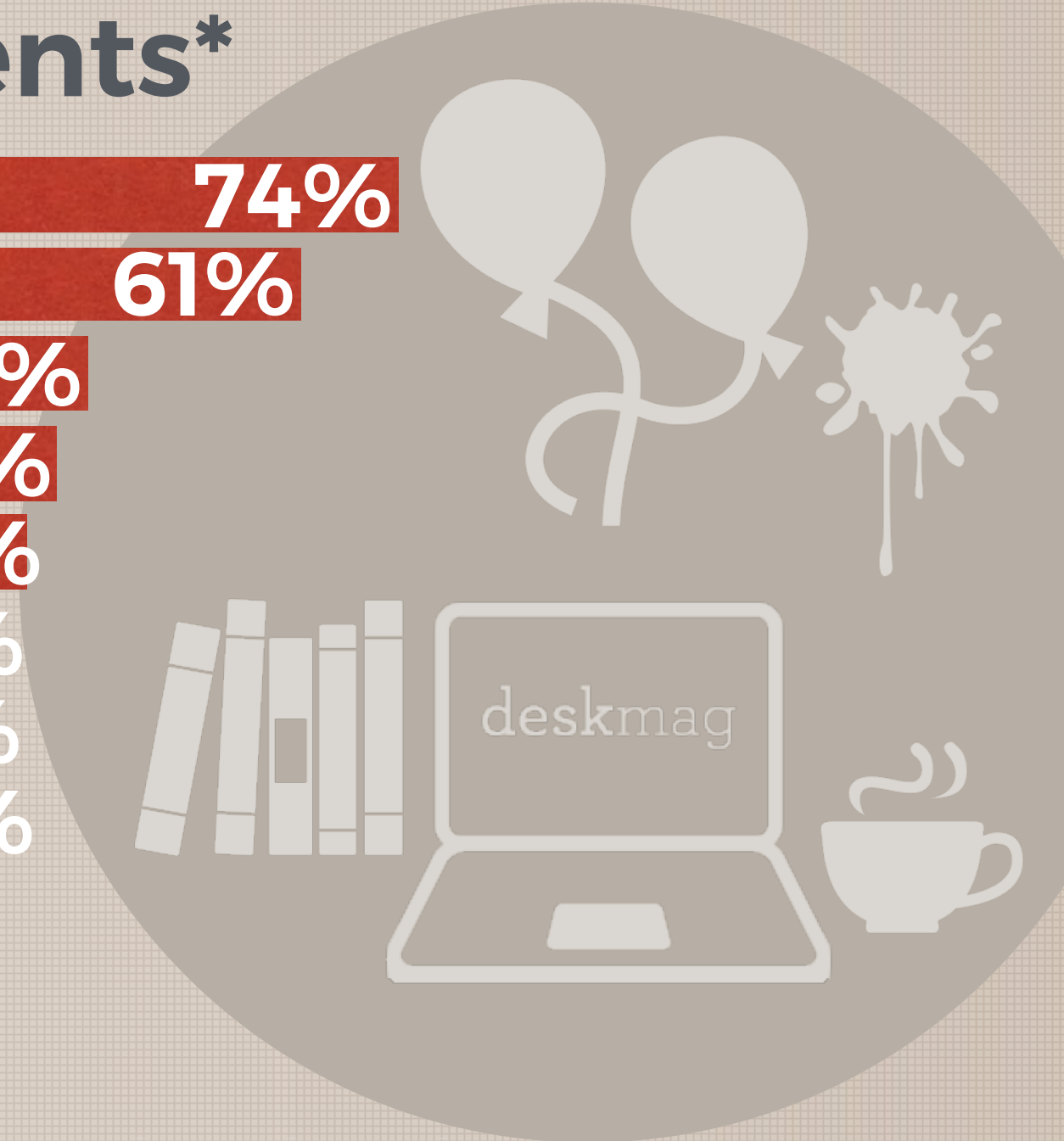
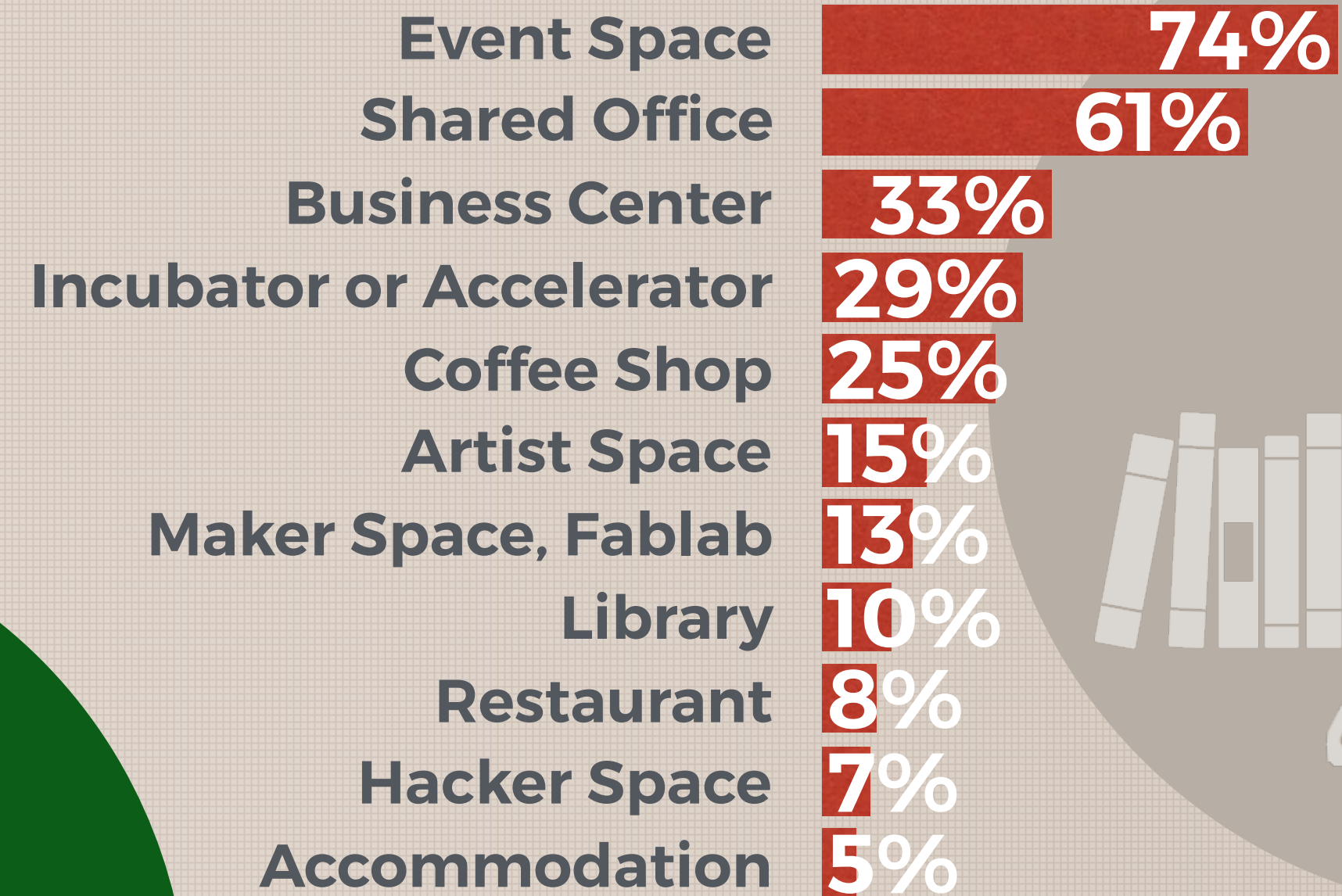
The location is mainly a...



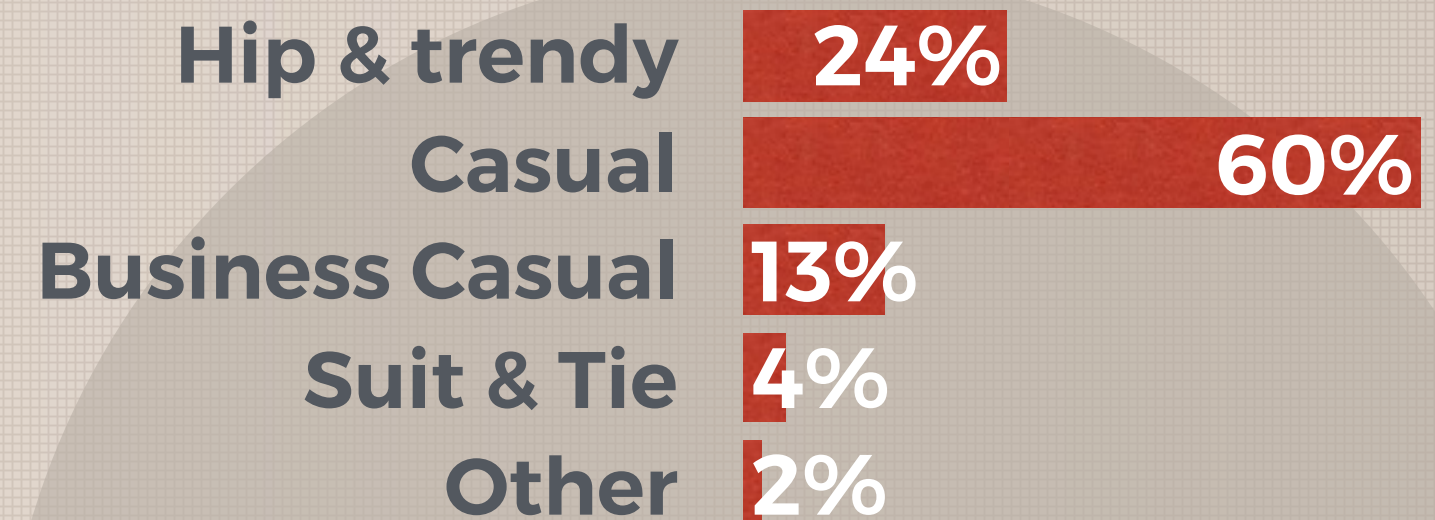
- Coworking Space
- Community Space
- Mixed Space
- Shared Office
- Business Center
- Incubator or Accelerator
- Artist Space
- Other



Additional elements*

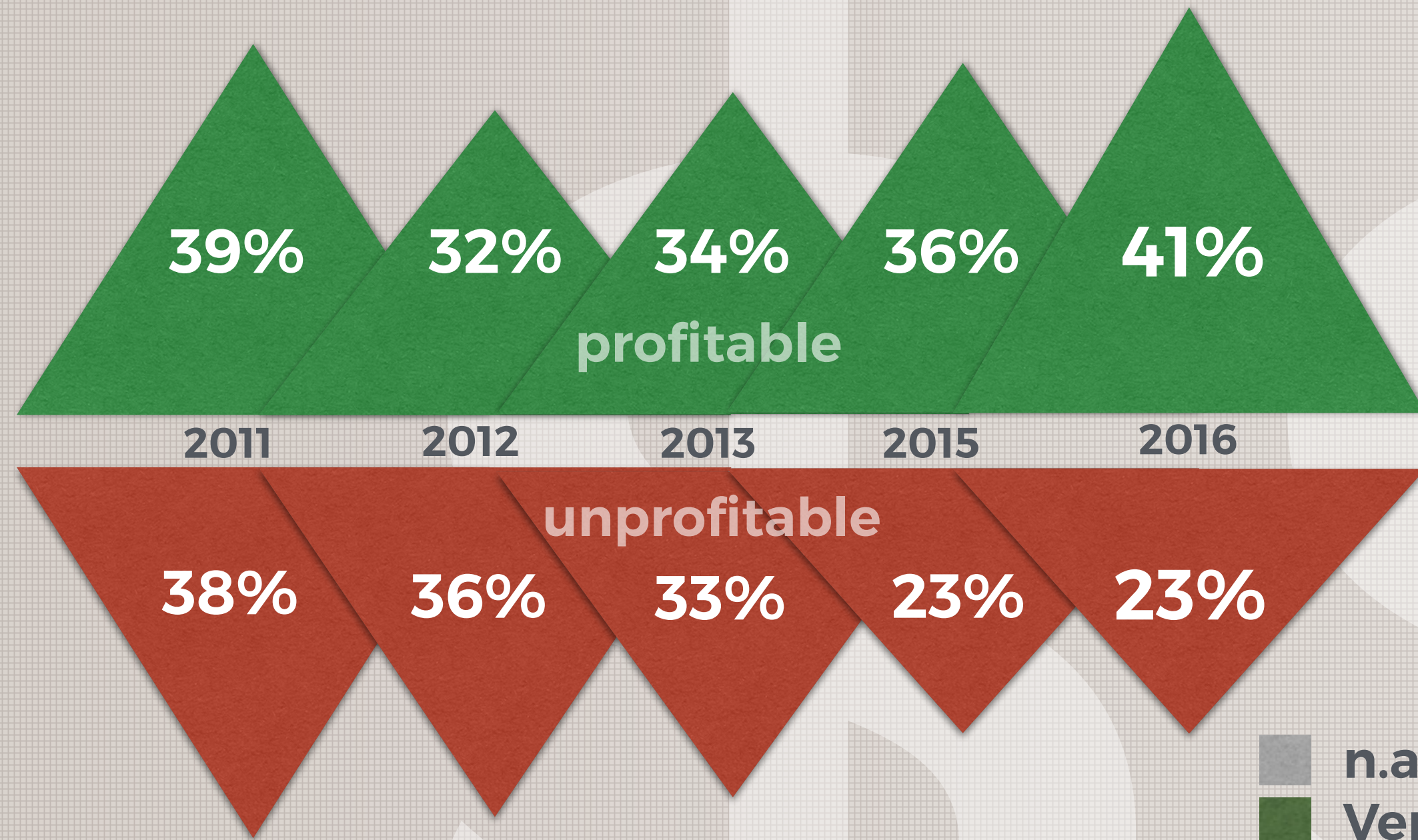


Members describe their coworking space as



*UNGROUPED, WITHOUT "COWORKING SPACE". EVERY LOCATION COULD CHOOSE FROM ALL ELEMENTS TO ALLOW ALL OPTIONS. THIS MAY RESULTED IN A SITUATION, THAT A SPACE DID NOT CHOOSE AN ELEMENT WHICH WAS ALSO THE PURPOSE OF THE MAIN LOCATION. A GROUPED ANALYSIS WITHOUT THIS EFFECT WILL BE PUBLISHED WITH THE FINAL RESULTS.

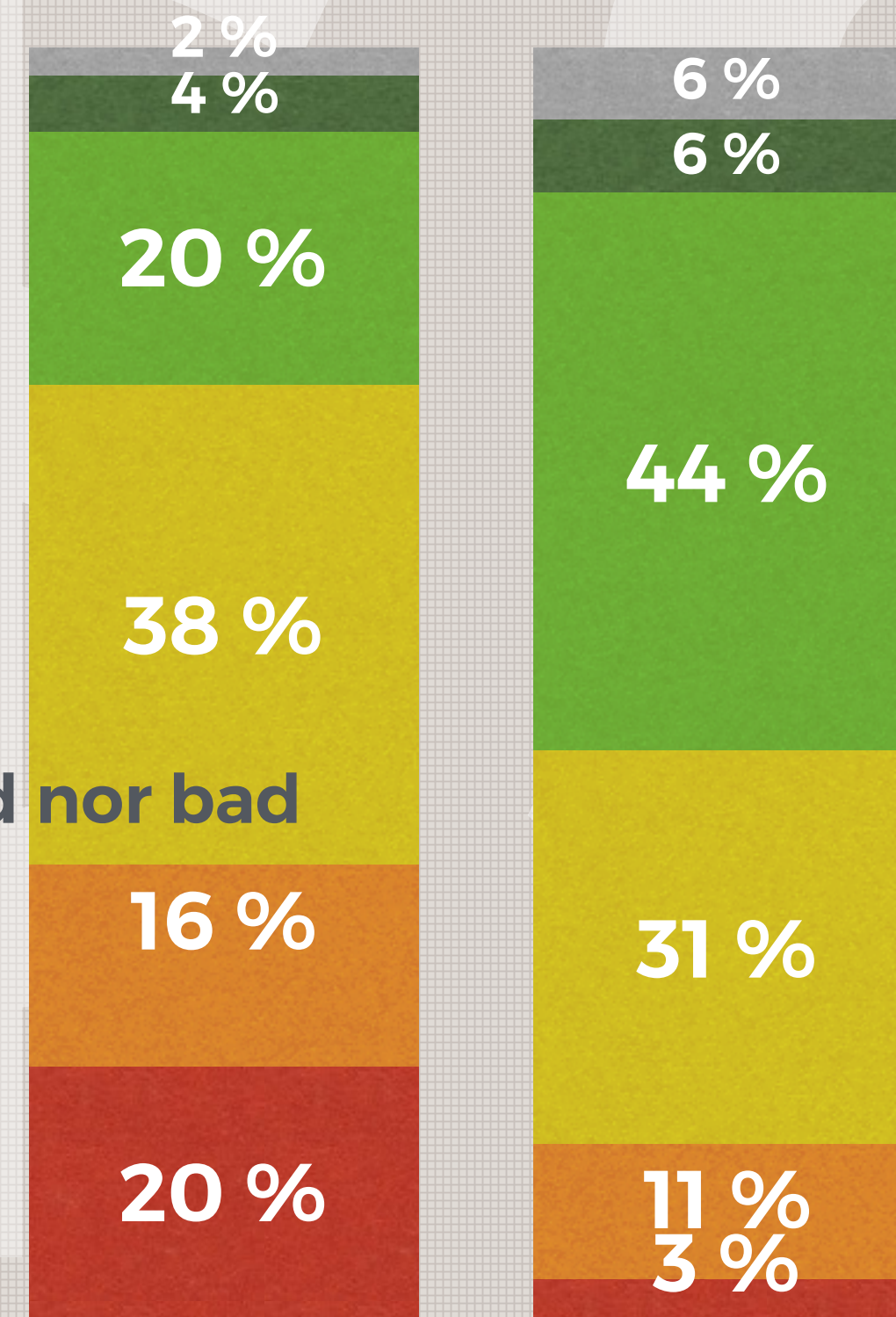
How profitable is your coworking space this year?



29%
of coworking spaces don't need to be profitable on their own in order to run the entire business successfully.

- n.a.
- Very good
- Rather good
- Neither good nor bad
- Rather bad
- Very bad

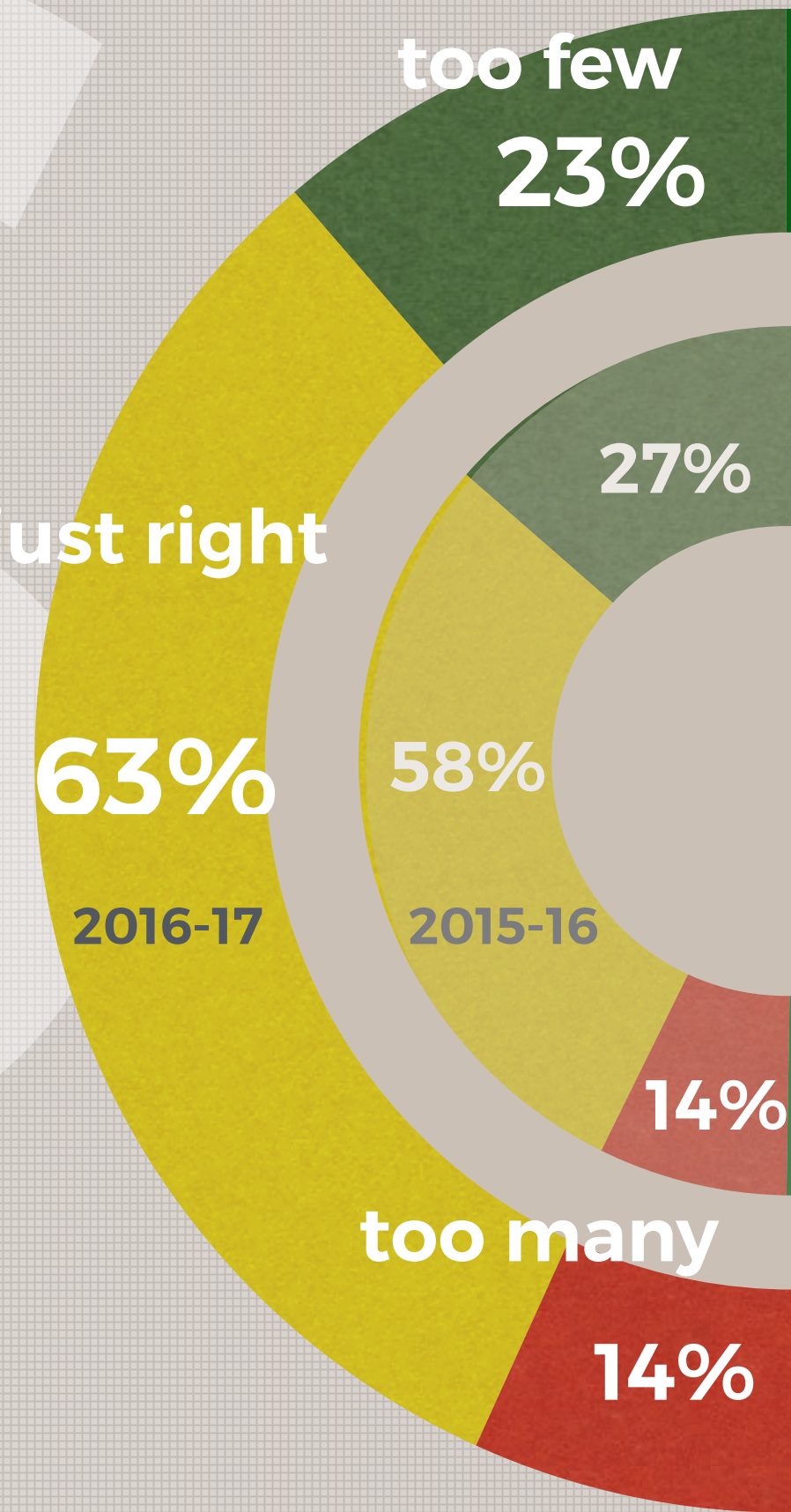
How do you rate your salary or compensation which you receive from your coworking space?

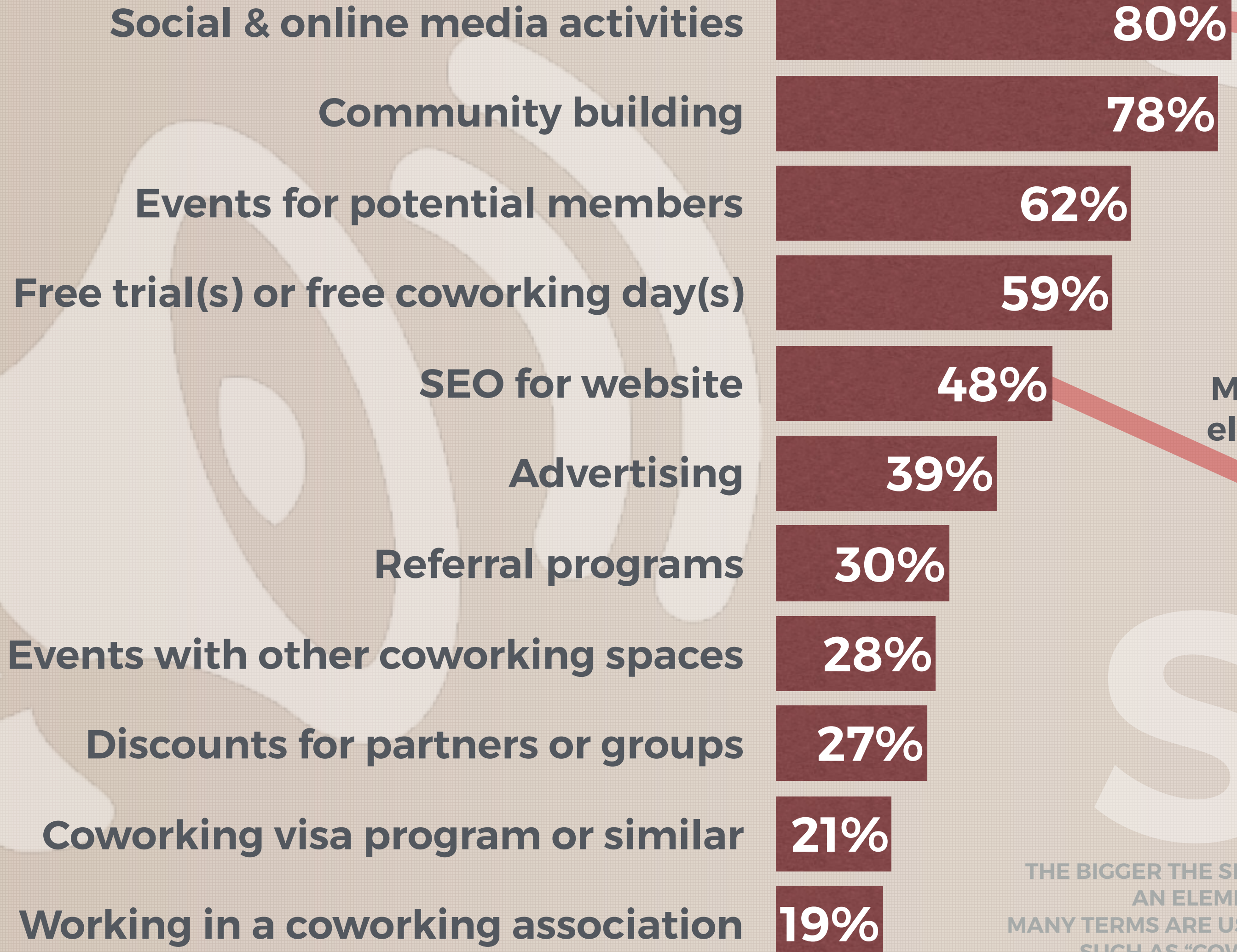


Owner, Founder

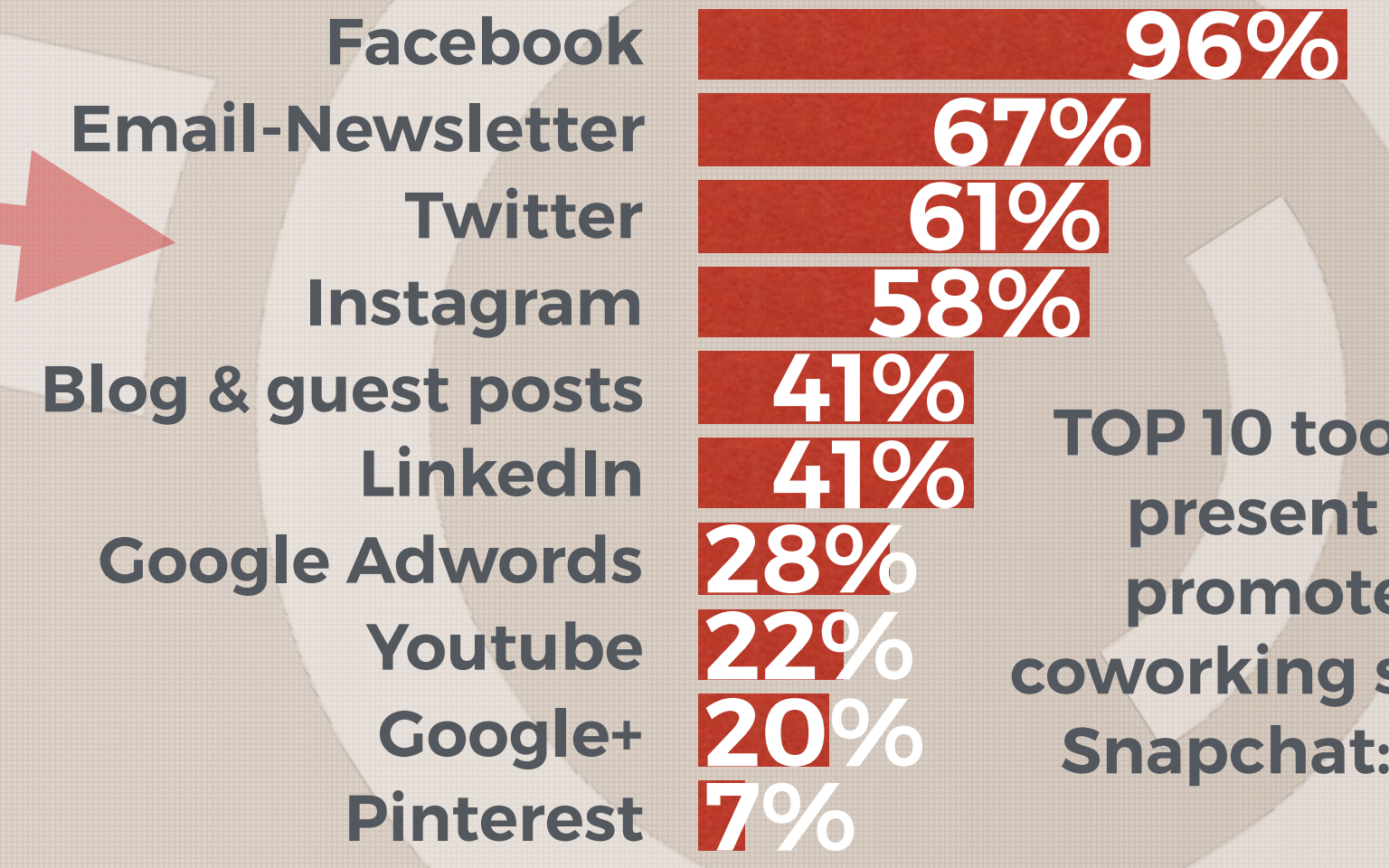
Staff

Are there too many or too few coworking spaces in your region?





Most often used elements of SEO terms



TOP 10 tools to present or promote a coworking space. Snapchat: 2%!

THE BIGGER THE SIZE, 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

Type of collaboration within the last twelve months

work on their own,
not in teams

55%
2016-17

56%
2015-16

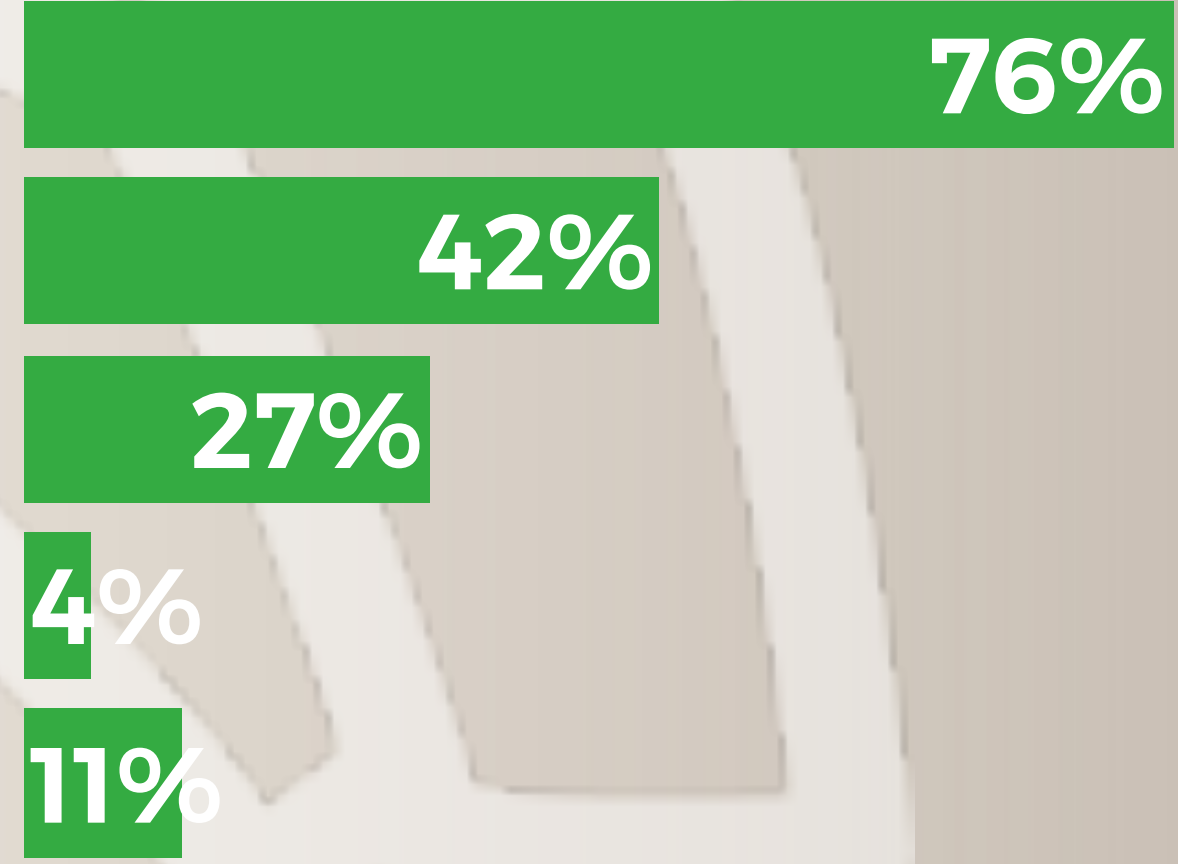
61%
2013-14

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

29%
did not

4
collaborations
on average

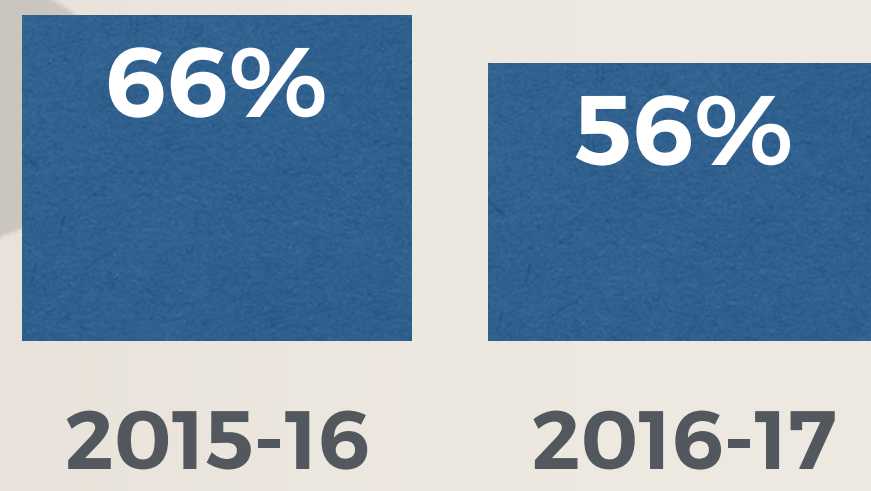
- Partnering on a project without contracts
- Contracting a project
- Hiring an employee
- Forming a company or new business



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



“Almost all or many members
know my first name”

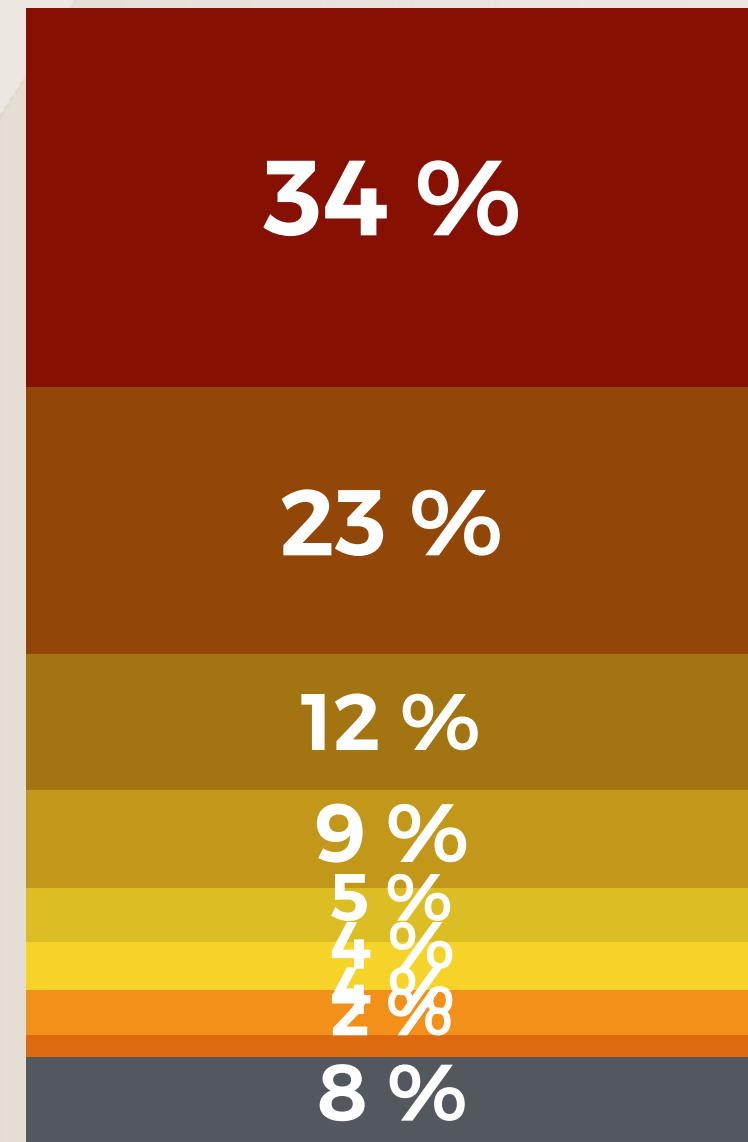


Coworking
spaces receive
11
job requests for
their members from
non-members
per month
on average

but...
1 in 5
don't get any
requests.

How members found their coworking space before becoming a member

- Word of mouth
- Internet search
- Their company/client
- Social media
- In the media (on- & offline)
- Passed by
- Listing directory
- Advertising
- Other



Coworking Spaces Rated By Their Members

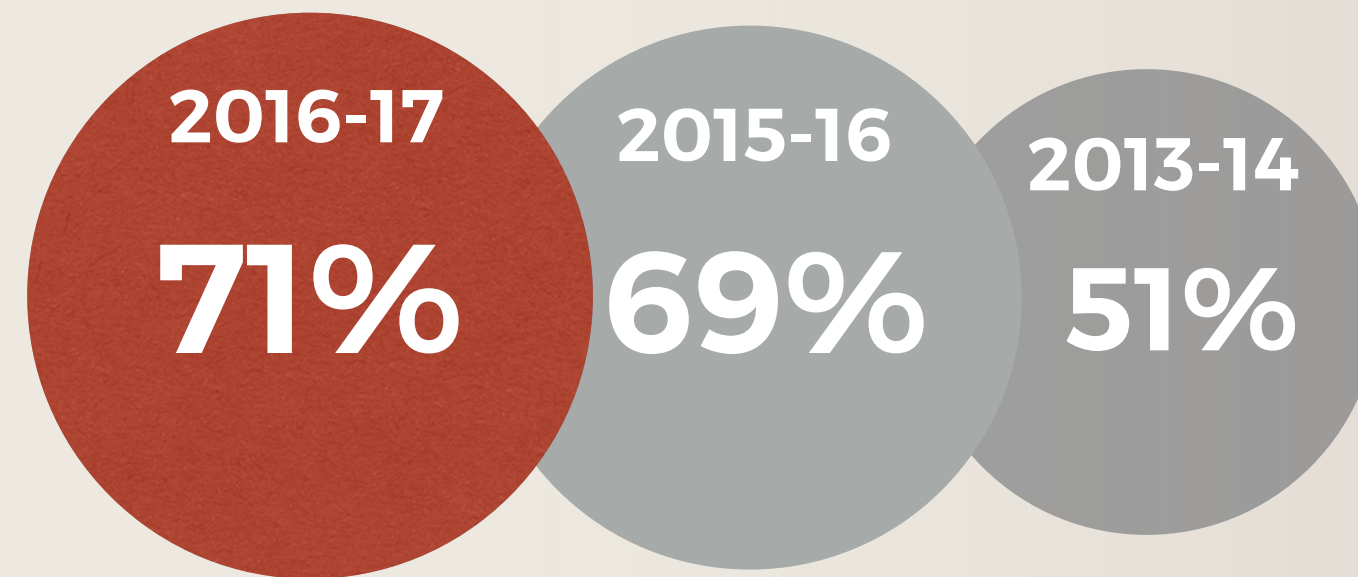


Who pays for the membership



32%
of members work abroad at least 3 weeks per year

44%
of those 32% would describe themselves as a Digital Nomad



of members work at a coworking space at least three times a week

14%
of members are **Digital Nomads** who also work abroad

In 2017,

67%

In 2016,

62%

In 2014,

59%

In 2012,

67%

of coworking spaces plan at least one extension. They plan to do so by...

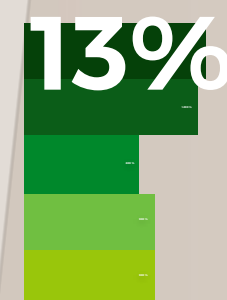
opening additional location(s)



expanding inside their current location



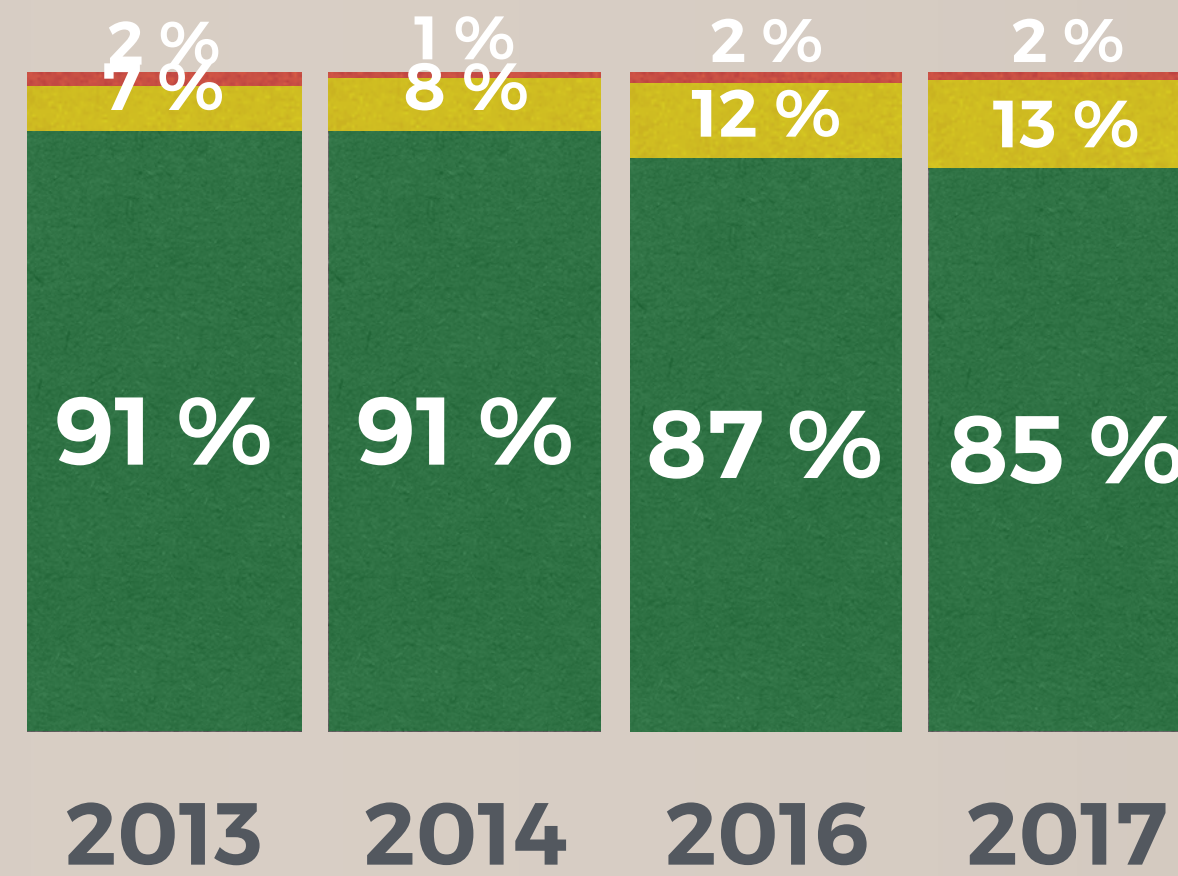
moving to larger location



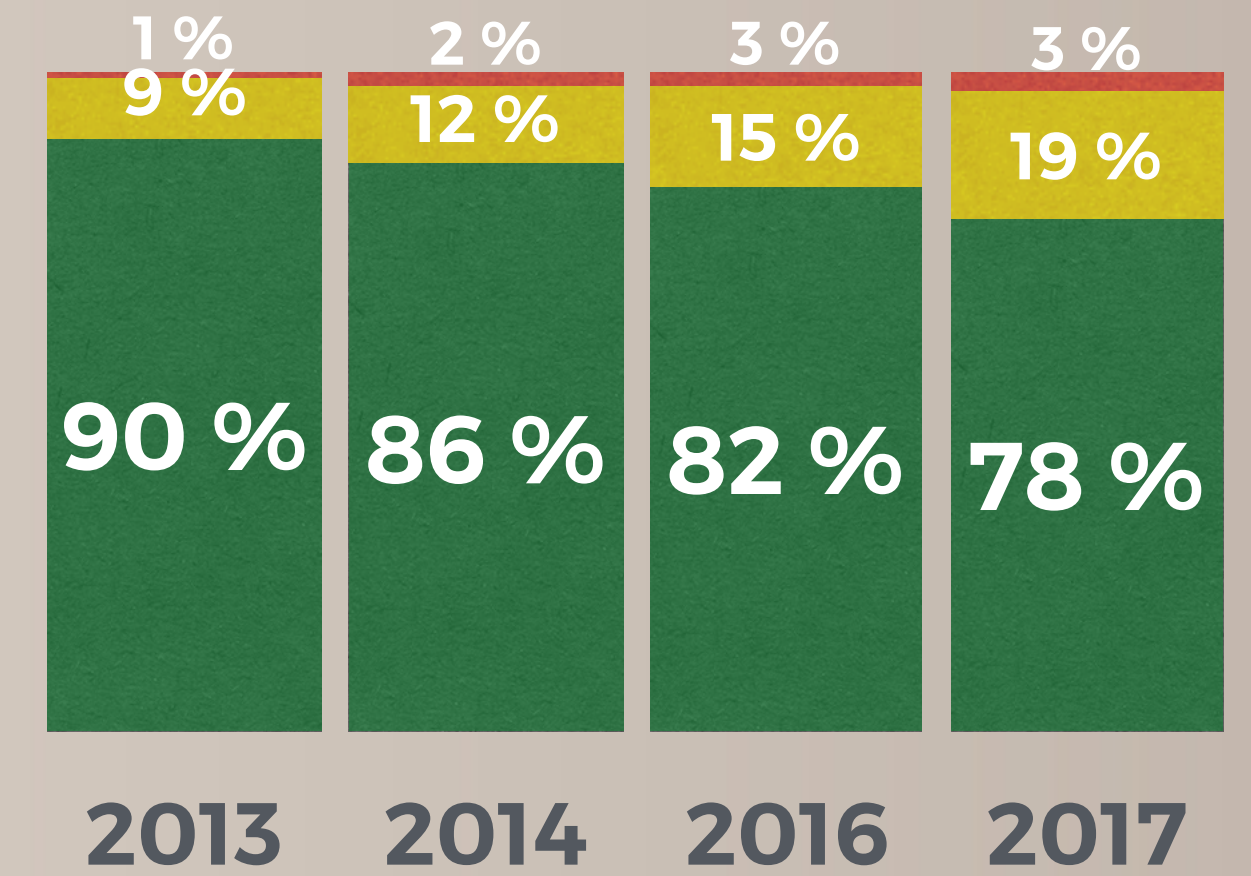
What coworking spaces expect for 2017

more no change less

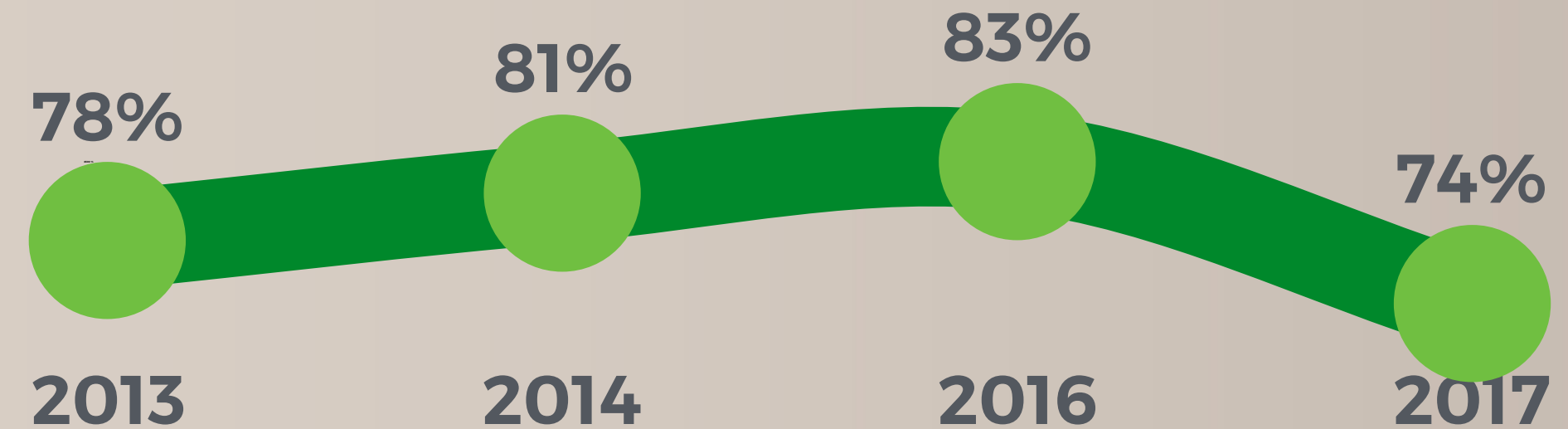
members



income



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



S()CIAL WORKPLACES.com

"Social Workplaces are the physical nodes where the new generation of knowledgeable connected workers find meaning in work, well-being and are amplified in terms of business operations and goals. SocialWorkplaces.com's #1 mission is to connect these rising workplace communities.

The company organizes the Coworking Europe conference: the first international conference of its kind, where approximately 500 coworking stakeholders from more than 40 countries gather each year. In 2015, the company launched the Coworking Africa conference and, more recently, introduced Coworking India, Coworking Middle East as well as the premium event "The Social Workplace Conference."

[SocialWorkplaces.com](https://www.SocialWorkplaces.com)



"Nexodus is a leading white-label platform to help coworking space operators with their day-to-day tasks. Today, hundreds of spaces around the world use Nexodus to spend less time typing and chasing invoices, keeping their communities engaged and up-to-date, or controlling who is in and out of the space and how it is used. Nexodus is made for and by their active community of users."

nexusdus.com



"Occupie, the essensys platform, is a simple, easy to use software platform that helps you manage your workspace from lead to cash and everything in between. Workspaces can attract and retain customers, grow additional income streams and gain business insight to make quicker decisions. We focus on ensuring that your workspace can deliver the best customer experience."

essensys.tech

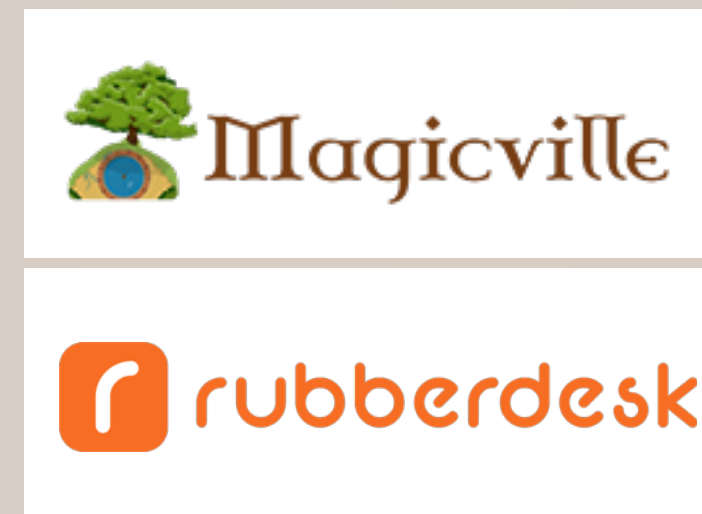
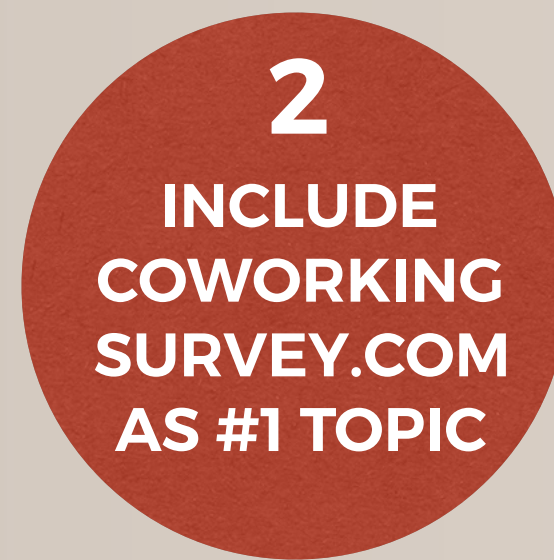
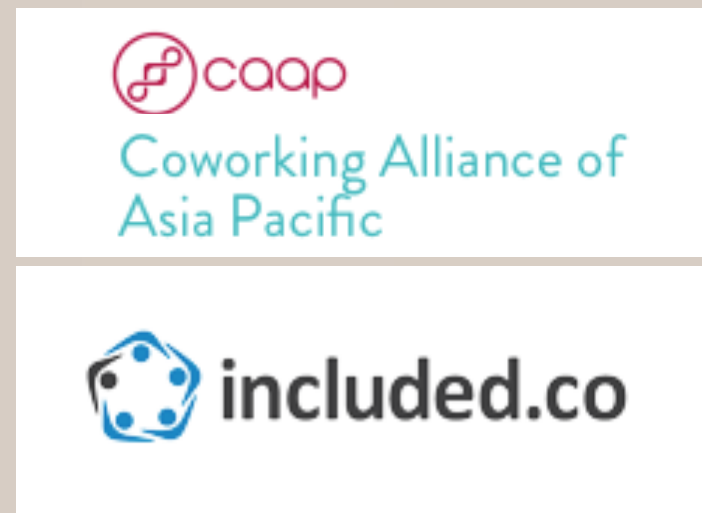
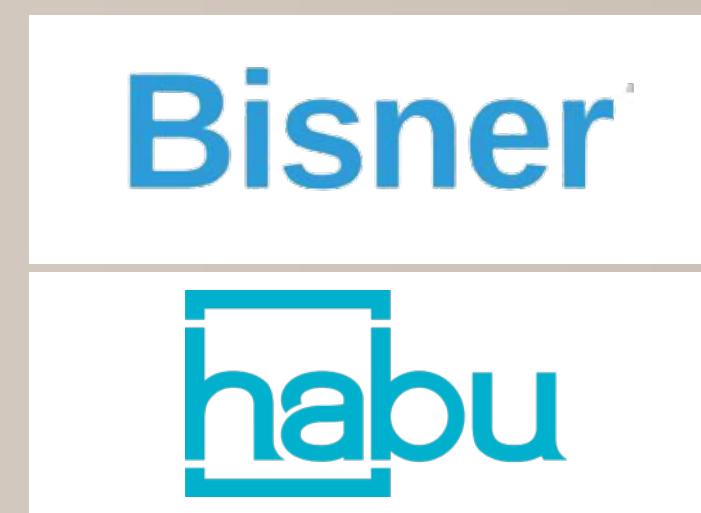


"Communitas believes in the power of community and the future of work. Through a marketing agency, benefits network, real estate advisory services and world-class publications, we help our clients better serve their stakeholders. Whether you are a builder of community or real estate, Communitas is here for you."

communitas.network

OFFICIAL SUPPORTERS OF THE GLOBAL COWORKING SURVEY

deskmag



THE OFFICIAL SUPPORTERS PROMOTED THE GLOBAL COWORKING SURVEY OFFICIALLY.

THE ONLINE SURVEY IS RUNNING FROM NOVEMBER 8, 2016 UNTIL DECEMBER 16, 2016

PARTICIPANTS: 2011-12: 913, 2012-13: 1206, 2013-14: 1270, 2015-16: 1679, 2016-17: 1013 (FIRST RESULTS ONLY, AS OF NOV 27, 2016)

THE FIRST RESULTS PROVIDE PARTICIPANTS, AND POTENTIAL PARTICIPANTS, WITH AN EARLY SNAPSHOT OF SOME RESULTS, MAINLY USING A UNIVARIATE ANALYSIS. QUESTIONS BEHIND THOSE RESULTS ARE REPLACED BY OTHER QUESTIONS WHILE THE SURVEY IS STILL RUNNING. THE FINAL RESULTS ARE ANALYZED USING A COMPLEX STATISTICAL TOOL, AND ARE CHECKING USING QUALITY STANDARDS. IT IS FOR THIS REASON THAT THE FIRST AND THE FINAL RESULTS MAY DIFFER SLIGHTLY. IN ADDITION, THE FINAL RESULTS ARE GROUPED BY DEMOGRAPHIC & OTHER CRITERIA USING A BI- OR MULTIVARIATE ANALYSIS.

SHARE YOUR COWORKING EXPERIENCE AT

COWORKINGSURVEY.COM

THE SURVEY IS RUNNING UNTIL DECEMBER 16, 2016



The Global Coworking Survey