FIRST RESULTS OF THE

2017 Global Coworking Survey

THE SURVEY IS STILL RUNNING. TAKE THE SURVEY HERE.
THE COWORKING MARKET IS STILL GROWING AT A HIGH RATE

NUMBER OF COWORKING SPACES WORLDWIDE
AS OF OCTOBER 31, EACH YEAR

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.
A COWORKING SPACE IS MORE THAN JUST A COWORKING SPACE

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.

Additional elements*

- Event Space: 74%
- Shared Office: 61%
- Business Center: 33%
- Incubator or Accelerator: 29%
- Coffee Shop: 25%
- Artist Space: 15%
- Maker Space, Fablab: 13%
- Library: 10%
- Restaurant: 8%
- Hacker Space: 7%
- Accommodation: 5%

The location is mainly a…

- Coworking Space: 58%
- Community Space: 14%
- Mixed Space: 11%
- Shared Office: 5%
- Business Center: 4%
- Incubator or Accelerator: 2%
- Artist Space: 2%
- Other: 1%

Members describe their coworking space as

- Hip & trendy: 60%
- Casual: 24%
- Business Casual: 13%
- Suit & Tie: 4%
- Other: 2%

*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?

- 39% profitable in 2011
- 32% profitable in 2012
- 34% profitable in 2013
- 36% profitable in 2015
- 41% profitable in 2016

- 38% unprofitable in 2011
- 36% unprofitable in 2012
- 33% unprofitable in 2013
- 23% unprofitable in 2015
- 23% unprofitable in 2016

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

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

- 63% too few in 2016-17
- 27% just right in 2016-17
- 14% too many in 2016-17

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

- Owner, Founder:
  - Very good: 38%
  - Rather good: 34%
  - Neither good nor bad: 11%
  - Rather bad: 20%
  - Very bad: 6%

- Staff:
  - Very good: 20%
  - Rather good: 64%
  - Neither good nor bad: 11%
  - Rather bad: 3%
  - Very bad: 3%

REPORTED BY COWORKING SPACES - 2016-17: BASED ON FIRST RESULTS. ALL OTHER YEARS ARE BASED ON FINAL RESULTS.
**Top 10 tools to present or promote a coworking space:**

- Facebook: 96%
- Email-Newsletter: 67%
- Twitter: 61%
- Instagram: 58%
- Blog & guest posts: 41%
- LinkedIn: 41%
- Google Adwords: 28%
- Youtube: 22%
- Google+: 20%
- Pinterest: 7%

**Community building is one of the top tools to attract new members**

<table>
<thead>
<tr>
<th>Social &amp; online media activities</th>
<th>80%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community building</td>
<td>78%</td>
</tr>
<tr>
<td>Events for potential members</td>
<td>62%</td>
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<tr>
<td>Free trial(s) or free coworking day(s)</td>
<td>59%</td>
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<tr>
<td>SEO for website</td>
<td>48%</td>
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<tr>
<td>Advertising</td>
<td>39%</td>
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<tr>
<td>Referral programs</td>
<td>30%</td>
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<tr>
<td>Events with other coworking spaces</td>
<td>28%</td>
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<tr>
<td>Discounts for partners or groups</td>
<td>27%</td>
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<tr>
<td>Coworking visa program or similar</td>
<td>21%</td>
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<tr>
<td>Working in a coworking association</td>
<td>19%</td>
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</tbody>
</table>

**Most often used elements of SEO terms**

- Snapchat: 2%

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Reported by Coworking Spaces - 2016-17: Based on first results.
COLLABORATION IS MAINLY BASED ON SMALL TASKS

- **71%** of members collaborated with other members within the last twelve months.
- 29% did not collaborate.
- **4 collaborations on average.**

Type of collaboration within the last twelve months:

- **Small task**: 76%
- Partnering on a project without contracts: 42%
- Contracting a project: 27%
- Hiring an employee: 4%
- Forming a company or new business: 11%

On average, a member talks with **5.2 other members per day**.

- **66%** of members collaborated with other members in 2015-16.
- **56%** in 2016-17.

“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.

REPORTED BY MEMBERS - 2016-17: BASED ON FIRST RESULTS. ALL OTHER YEARS ARE BASED ON FINAL RESULTS.
WORD OF MOUTH IS ATTRACTING MOST OF NEW MEMBERS

How members found their coworking space before becoming a member

- Word of mouth: 34%
- Internet search: 23%
- Their company/client: 12%
- Social media: 9%
- In the media (on- & offline): 4%
- Passed by: 2%
- Listing directory: 8%
- Advertising: 4%
- Other: 4%
- Other: 4%

Who pays for the membership

- Myself: 61%
- My employer: 26%
- I pay with other types of capital: 7%
- It's a membership with a free plan: 4%
- Other: 3%

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

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

14% of members are Digital Nomads who also work abroad

Coworking Spaces Rated By Their Members

- 2016-17: 8.17
- 2015-16: 8.30
- 2013-14: 8.24
- 2011-12: 8.37

71% of members work at a coworking space at least three times a week

REPORTED BY MEMBERS - 2016-17: BASED ON FIRST RESULTS. ALL OTHER YEARS ARE BASED ON FINAL RESULTS.
MORE COWORKING SPACES PLAN TO EXPAND, BY ADDING NEW LOCATIONS

In 2017, 67% of coworking spaces plan at least one extension. They plan to do so by...

- Opening additional location(s): 42%
- Expanding inside their current location: 25%
- Moving to larger location: 13%

What coworking spaces expect for 2017

- Members:
  - More: 91%
  - No change: 91%
  - Less: 87%
  - More: 85%

- Income:
  - More: 90%
  - No change: 86%
  - Less: 82%
  - More: 78%

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

- 2013: 78%
- 2014: 81%
- 2016: 83%
- 2017: 74%

REPORTED BY COWORKING SPACES - 2016-17: BASED ON FIRST RESULTS. ALL OTHER YEARS ARE BASED ON FINAL RESULTS.
"Social Workplaces are the physical nodes where the new generation of knowledgable 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.”
### MAIN SUPPORTERS OF THE GLOBAL COWORKING SURVEY

<table>
<thead>
<tr>
<th>SUPPORTER</th>
<th>SUPPORTER INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nexudus</td>
<td>&quot;Nexudus 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 Nexudus 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. Nexudus is made for and by their active community of users.&quot;</td>
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<tr>
<td>Occupie, the essensys platform</td>
<td>&quot;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.&quot;</td>
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<tr>
<td>Communitas</td>
<td>&quot;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.&quot;</td>
</tr>
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[ nexudus.com ](https://nexudus.com)

[ essensys.tech ](https://essensys.tech)

[ communitas.network ](https://communitas.network)

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The main supporters support the independent research of the Global Coworking Survey with financial resources and promoted the survey officially.
OFFICIAL SUPPORTERS OF THE GLOBAL COWORKING SURVEY

THE OFFICIAL SUPPORTERS PROMOTED THE GLOBAL COWORKING SURVEY OFFICIALLY.

1 SEND A NEWSLETTER TO YOUR MEMBERS

2 INCLUDE COWORKING SURVEY.COM AS #1 TOPIC

3 SEND A COPY & YOUR LOGO TO SURVEY@DESKMAG.COM

GET MENTIONED IN OUR PUBLISHINGS
THE ONLINE SURVEY IS RUNNING FROM NOVEMBER 8, 2016 UNTIL DECEMBER 16, 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