

2018 GLOBAL COWORKING SURVEY

deskmag

# 2018 COWORKING FORECAST

THE INDEPENDENT RESEARCH IS SUPPORTED BY

**NEXUDUS·SPACES**

**esSENSYS**

 **WUN**  
by 

READ MORE AT [BIT.LY/2018FORECAST](http://bit.ly/2018forecast)

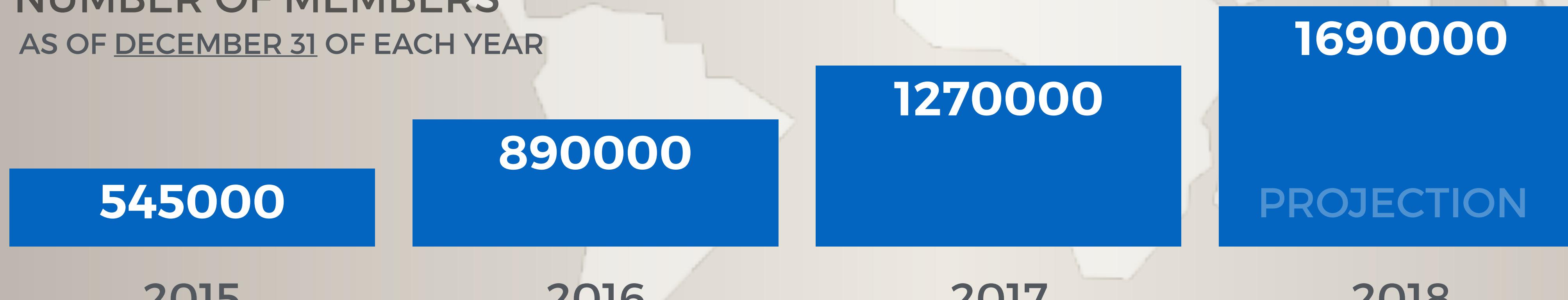
## NUMBER OF COWORKING SPACES

AS OF DECEMBER 31 OF EACH YEAR



## NUMBER OF MEMBERS

AS OF DECEMBER 31 OF EACH YEAR



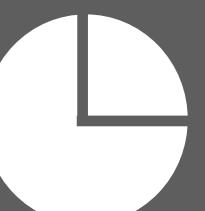
2015-2017: CALCULATION BASED ON SURVEY RESULTS

RECALCULATED ACCORDING TO THE LATEST DEVELOPMENT AND FOR DECEMBER 31 OF EACH YEAR - NOT OCTOBER 31 AS IN THE PREVIOUS SURVEYS

2018: PROJECTION

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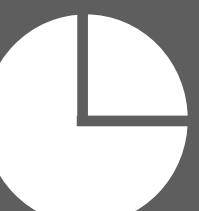
THE 2018  
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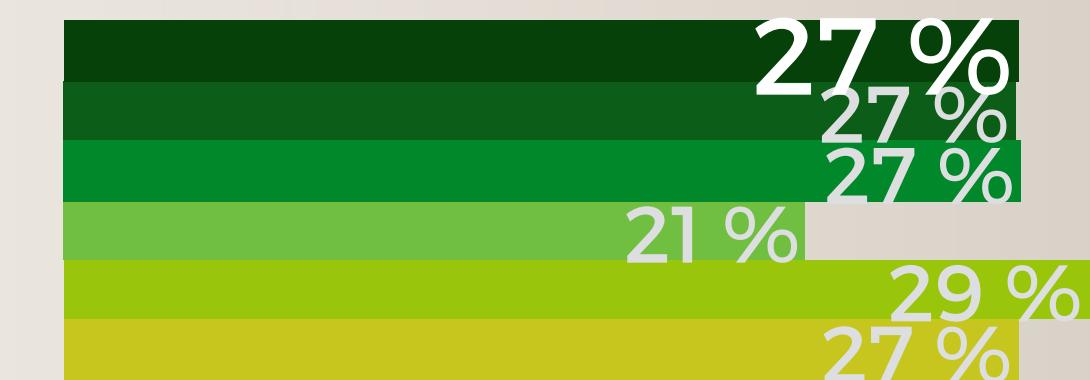
# MAJOR TRENDS FOR COWORKING SPACES IN 2018



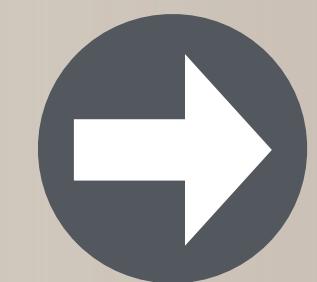
THE BIGGER THE SURFACE OF A RECTANGLE THE MORE OFTEN THE TREND WAS MENTIONED  
THE TRENDS HAVE BEEN COLLECTED, SUMMARIZED AND STRUCTURED FROM OPEN RESPONSES  
REPORTED BY COWORKING SPACES.



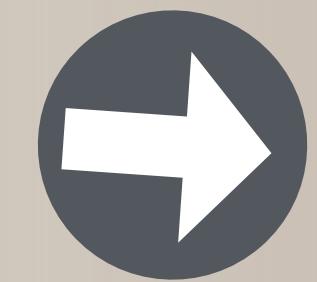
YES, WITH MORE DESKS AND SPACE IN OUR CURRENT LOCATION



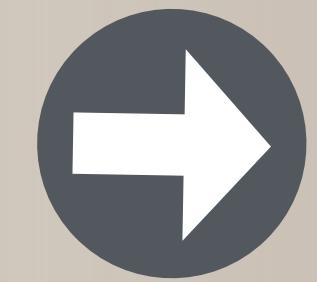
TREND



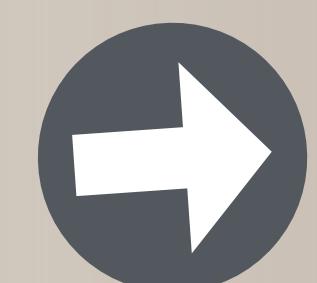
YES, WE PLAN TO MOVE TO ANOTHER, LARGER LOCATION



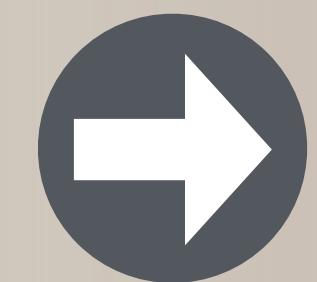
YES, WE PLAN TO OPEN (AN)OTHER EXTRA LOCATION(S)



NO



OTHER



MULTIPLE "YES"-OPTIONS ALLOWED.  
REPORTED BY COWORKING SPACES, RESULTS ROUNDED.

■ 2018

■ 2017

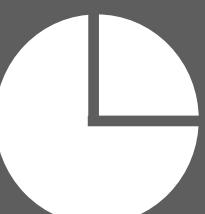
■ 2016

■ 2014

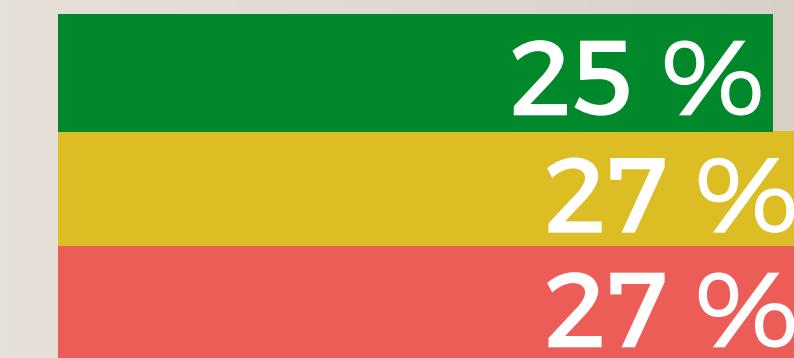
■ 2013

■ 2012

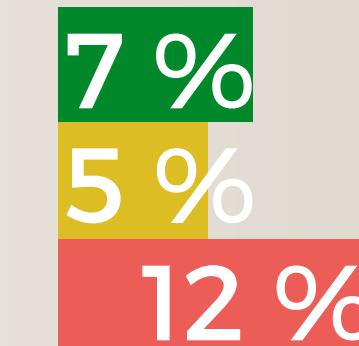
4



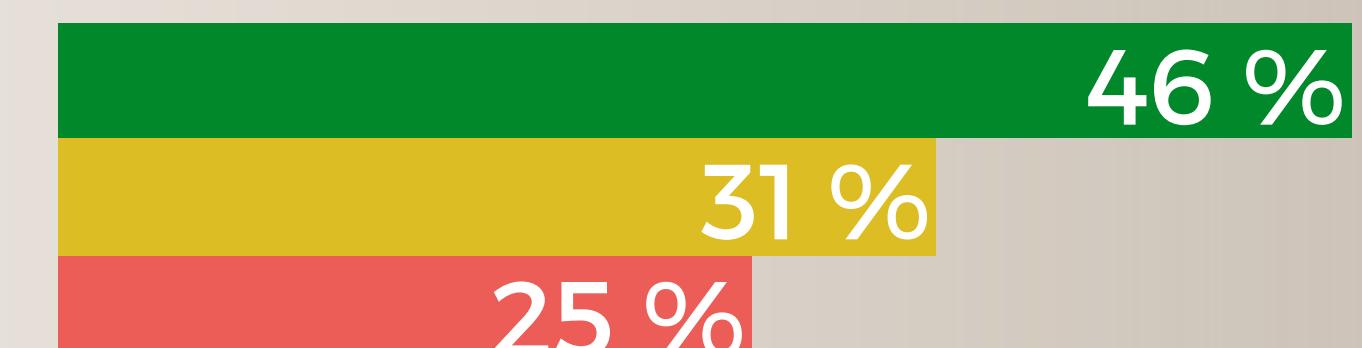
YES, WITH MORE DESKS AND SPACE IN OUR CURRENT LOCATION



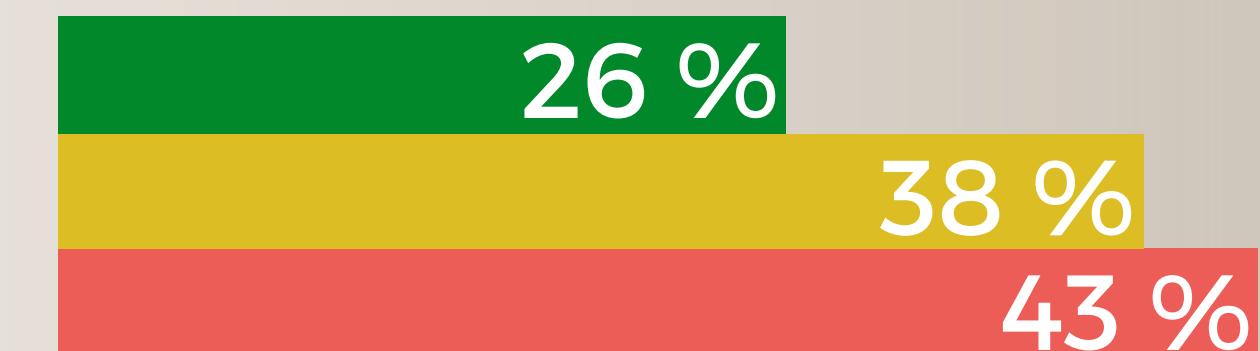
YES, WE PLAN TO MOVE TO ANOTHER, LARGER LOCATION



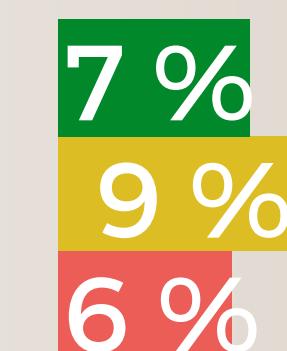
YES, WE PLAN TO OPEN (AN)OTHER EXTRA LOCATION(S)



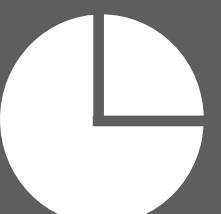
NO



OTHER



MULTIPLE "YES"-OPTIONS ALLOWED.  
REPORTED BY COWORKING SPACES, RESULTS ROUNDED.



## COWORKING SPACE IN SQM OR SQF WILL BE EXPANDED IN 2018 BY

YES, WITH MORE DESKS AND SPACE IN OUR CURRENT LOCATION

NEW: 2018  
69%  
5% TRIMMED  
MEAN

MEAN: 82%, MEDIAN: 50%

MEAN: 72%,  
MEDIAN: 50%

65%

YES, WE PLAN TO MOVE TO ANOTHER, LARGER LOCATION

MEAN: 134%,  
MEDIAN: 100%

126%

YES, WE PLAN TO OPEN (AN)OTHER EXTRA LOCATION(S)

MEAN: 113%,  
MEDIAN: 70%

102%

NO

2%

MEAN: 6.5%,  
MEDIAN: 0%

OTHER

28%

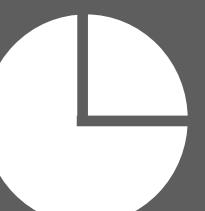
MEAN: 31%,  
MEDIAN: 13%

REPORTED BY ALL COWORKING SPACES

ALL "YES" OPTIONS DO NOT TAKE INTO ACCOUNT 0% EXPANSIONS

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THE 2018  
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## COWORKING SPACE IN SQM OR SQF WILL BE EXPANDED IN 2018 BY

YES, WITH MORE DESKS AND SPACE IN OUR CURRENT LOCATION

NEW: 2018  
**70%**  
5% TRIMMED  
MEAN

MEAN: 84%, MEDIAN: 50%

MEAN: 77%,  
MEDIAN: 50% **63%**

YES, WE PLAN TO MOVE TO ANOTHER, LARGER LOCATION

MEAN: 164%,  
MEDIAN: 100%

**159%**

YES, WE PLAN TO OPEN (AN)OTHER EXTRA LOCATION(S)

MEAN: 136%,  
MEDIAN: 100%

**127%**



NO

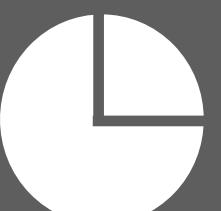
**3%**  
MEAN: 7%,  
MEDIAN: 0%

OTHER

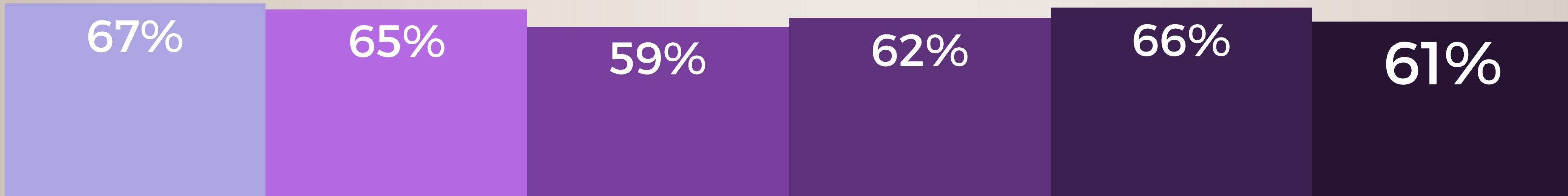
**21%**

MEAN: 24%,  
MEDIAN: 0%

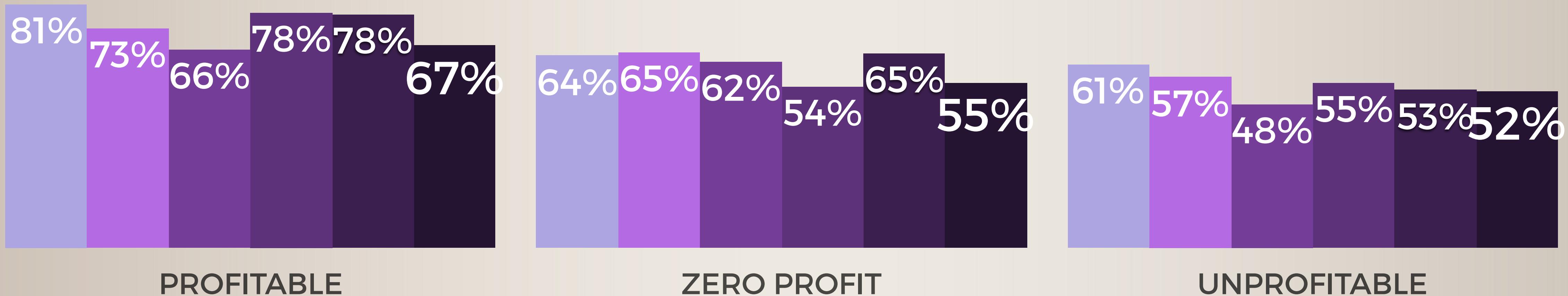
REPORTED BY: OPERATORS OR OWNERS WHO  
CURRENTLY RUN ONE COWORKING SPACE ONLY  
ALL “YES” OPTIONS DO NOT TAKE INTO ACCOUNT 0% EXPANSIONS.



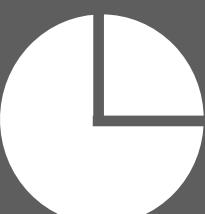
## GENERAL RESULTS



## BY PROFITABILITY



ALL "YES" OPTIONS WERE COMBINED AND COUNTED ONLY ONCE PER COWORKING SPACE.

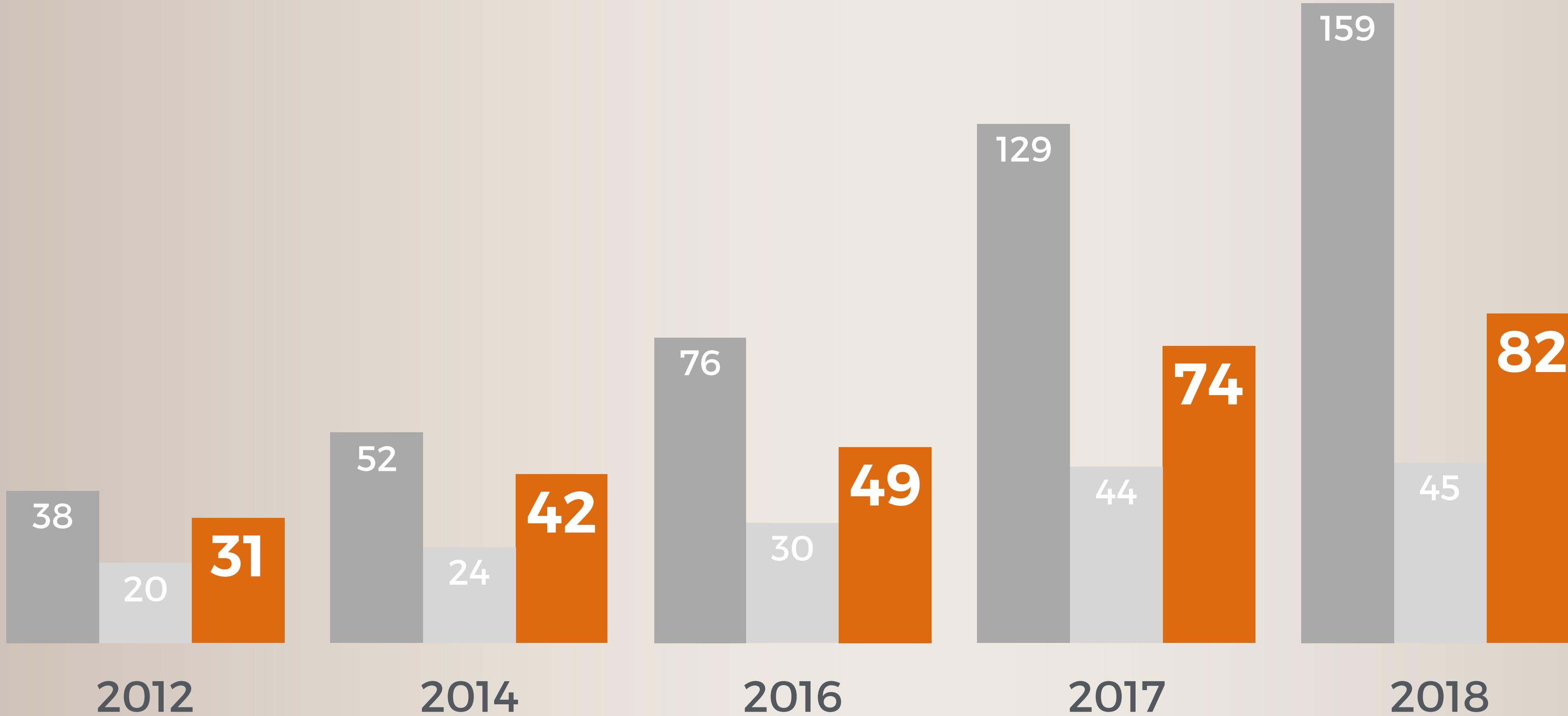


# AVERAGE NUMBER OF MEMBERS PER COWORKING SPACE

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REPORTED BY COWORKING SPACES - RESULTS ARE ROUNDED

TREND



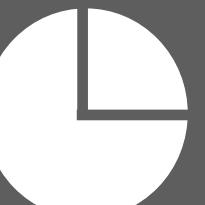
AVERAGE: ARITHMETIC MEAN

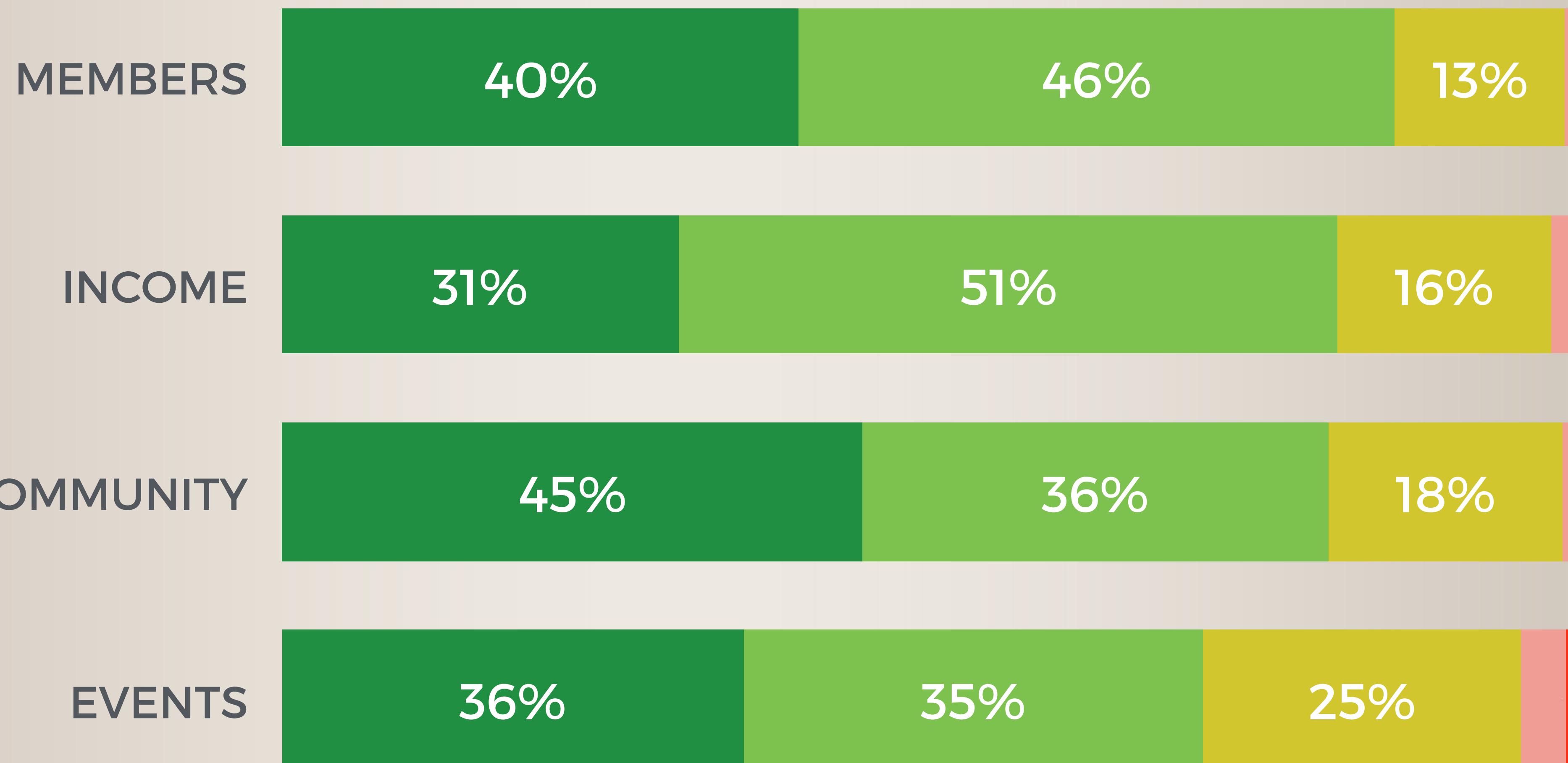
AVERAGE: MEDIAN (50% VALUE)

5% TRIMMED MEAN (EXCLUDING THE LOWEST AND HIGHEST 5% OF VALUES.)

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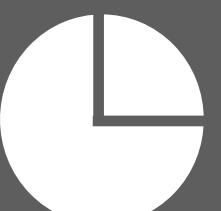
█ MUCH MORE...  
█ SLIGHTLY LESS...

█ SLIGHTLY MORE...  
█ MUCH LESS...

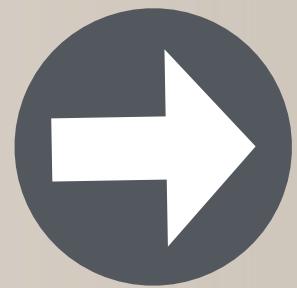
█ THE SAME AMOUNT OF...

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TREND



## MORE MEMBERS



## MORE INCOME



## MORE SENSE OF COMMUNITY



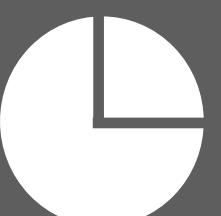
## MORE EVENTS



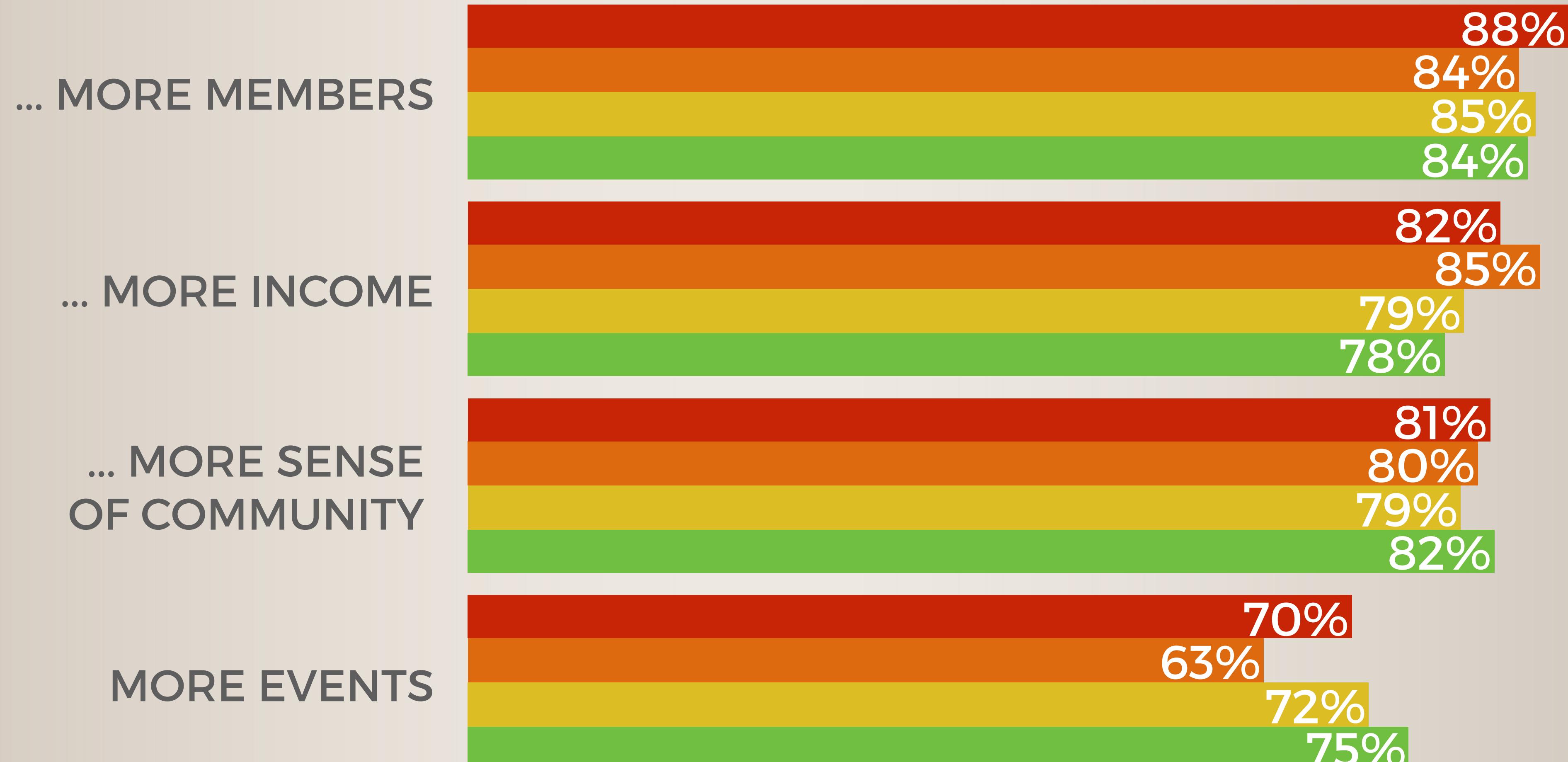
COMBINED RESULTS OF "MUCH MORE" AND "SLIGHTLY MORE".

■ FOR 2018 ■ FOR 2017 ■ FOR 2016 ■ FOR 2014 ■ FOR 2012

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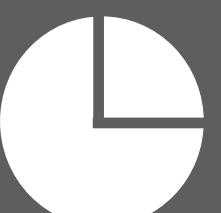
## (BY NO. OF INHABITANTS LOCAL TO THE COWORKING SPACE)



COMBINED RESULTS OF "MUCH MORE" AND "RATHER MORE".

█ ≥ 1M INHABITANTS  
█ < 500K - 100K INHABITANTS

█ < 1M - 500K INHABITANTS  
█ < 100K INHABITANTS



## (BY AGE OF COWORKING SPACES)

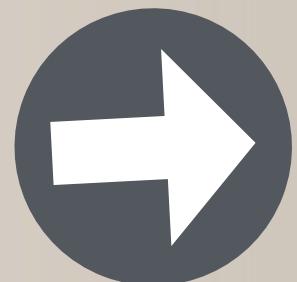
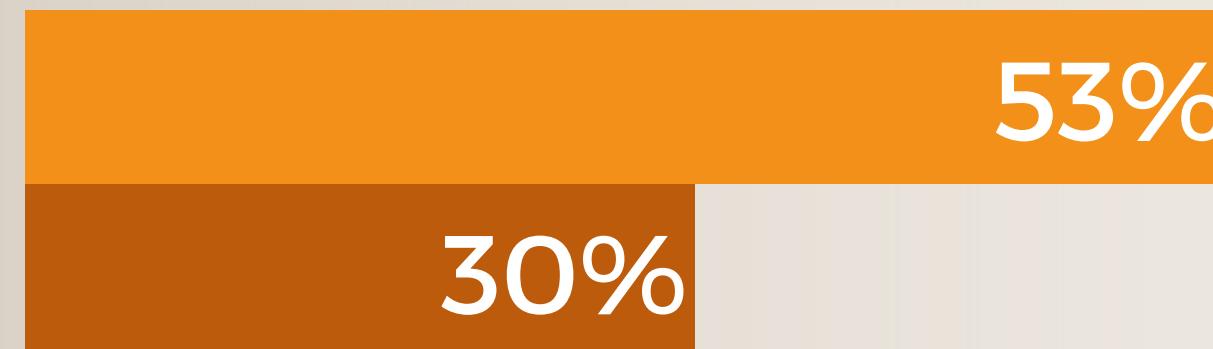
FOR 2018

2017

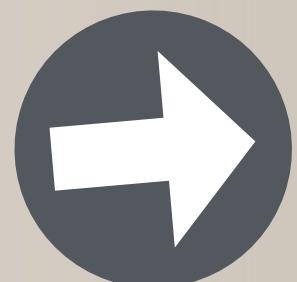
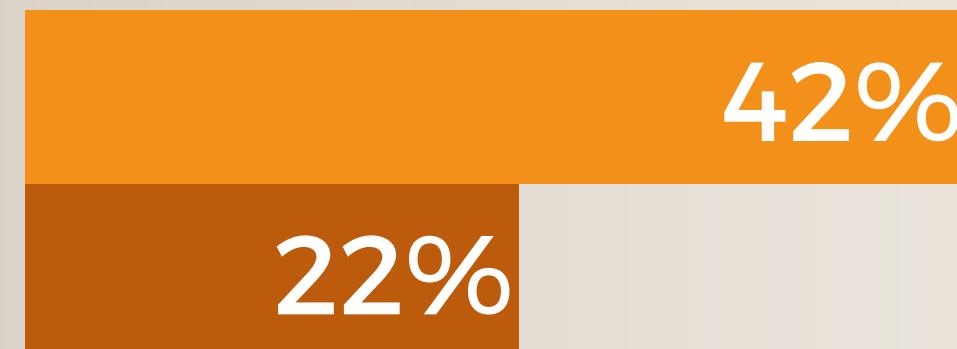
2016

TREND

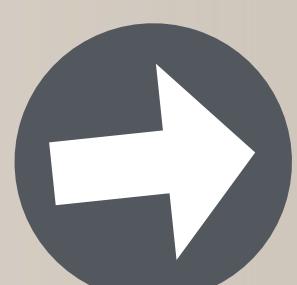
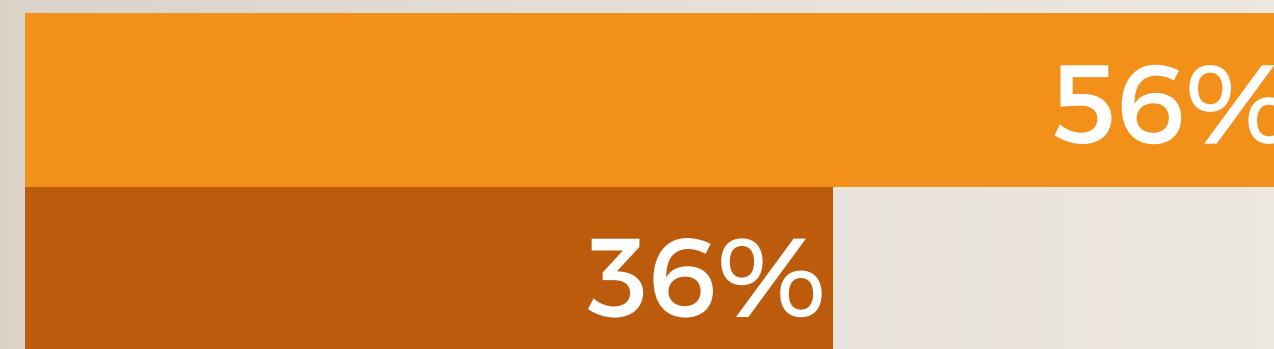
...MEMBERS



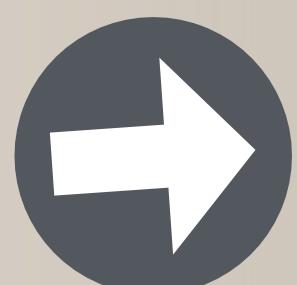
...INCOME



...SENSE OF COMMUNITY

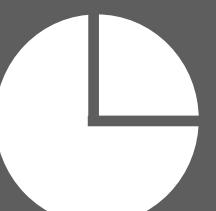


...EVENTS

SHOWING THE MOST POSITIVE ANTICIPATIONS ONLY "MUCH MORE" (++) , N.A. = NOT CONSIDERED - REPORTED BY COWORKING SPACES, RESULTS ARE ROUNDED

UP TO 17 MONTHS OLD  
 18 MONTHS OR OLDER

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# DISTRIBUTION OF COWORKING SPACES BY MEMBER NUMBERS

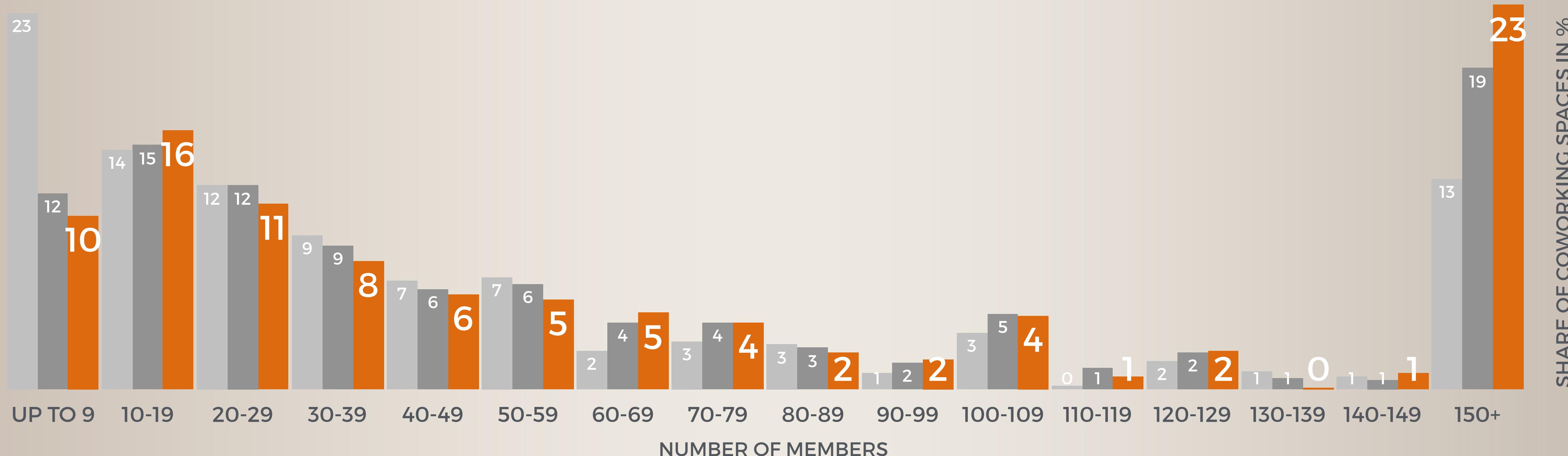
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IN % - REPORTED BY COWORKING SPACES - RESULTS ARE GROUPED & ROUNDED

TREND



TREND



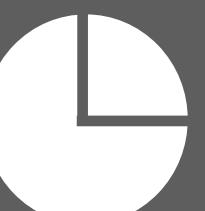
2016

2017

2018

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## SHARE OF MEMBERSHIPS THAT ARE 12 MONTHS OR SHORTER

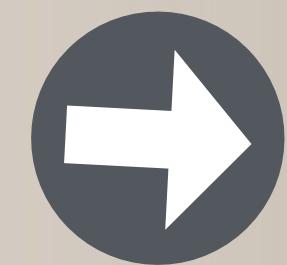
REPORTED BY MEMBERS - RESULTS ARE ROUNDED

**63%\***

\*SHARE OF MEMBERS  
WHO STARTED  
COWORKING FOR THE  
FIRST TIME



TREND:  
STABLE



## SHARE OF COWORKING SPACES THAT ARE 12 MONTHS OLD OR YOUNGER

REPORTED BY COWORKING SPACES - RESULTS ARE ROUNDED

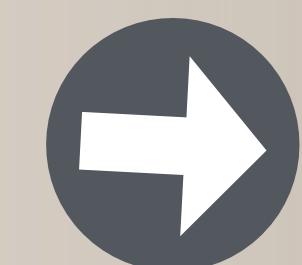
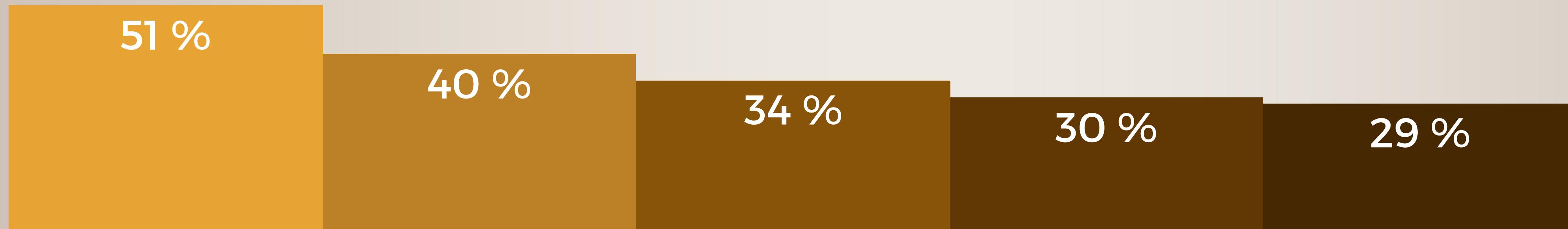
**51 %**

**40 %**

**34 %**

**30 %**

**29 %**



■ 2012

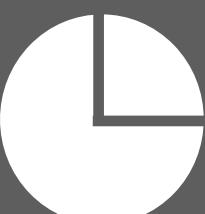
■ 2014

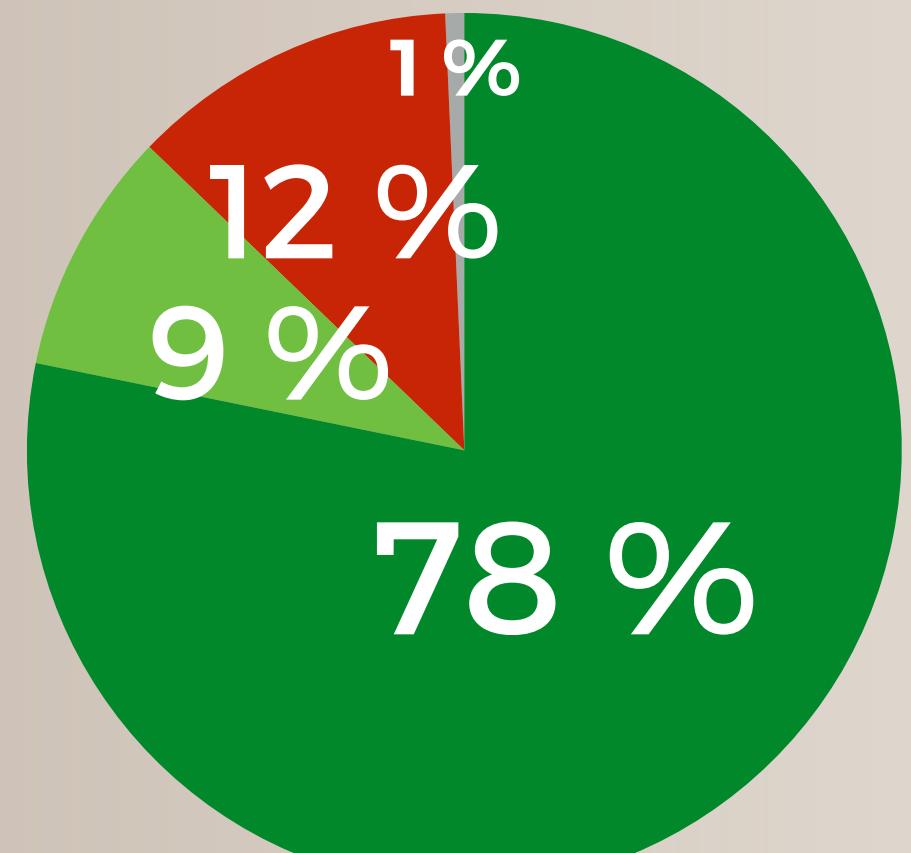
■ 2016

■ 2017

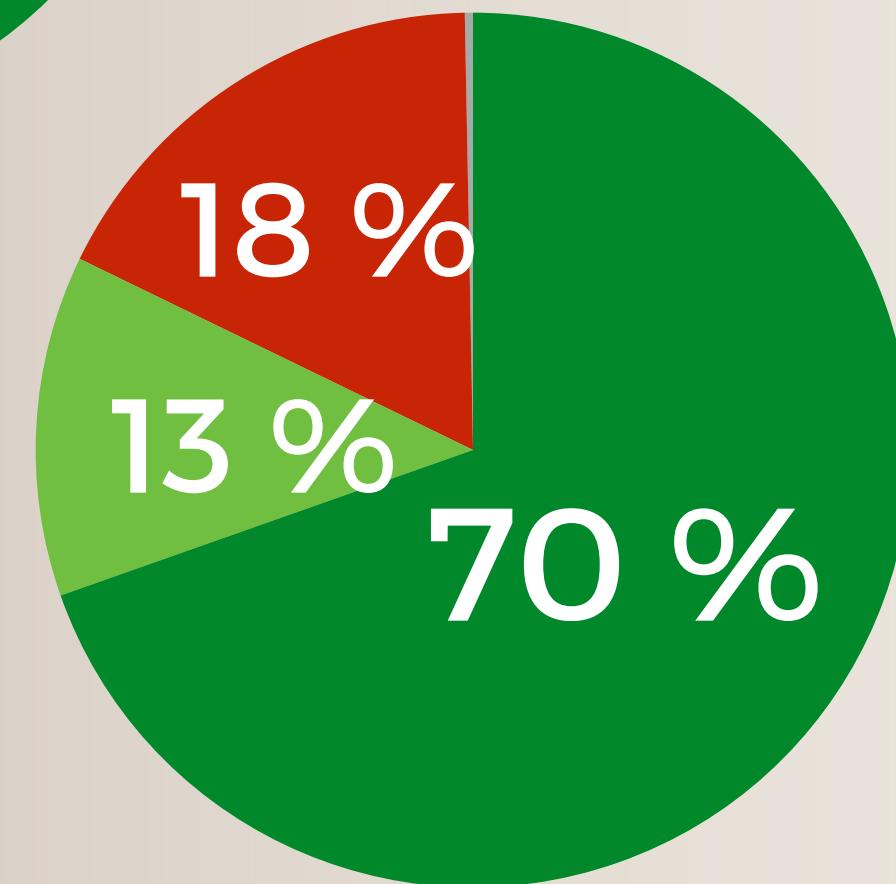
■ 2018

15

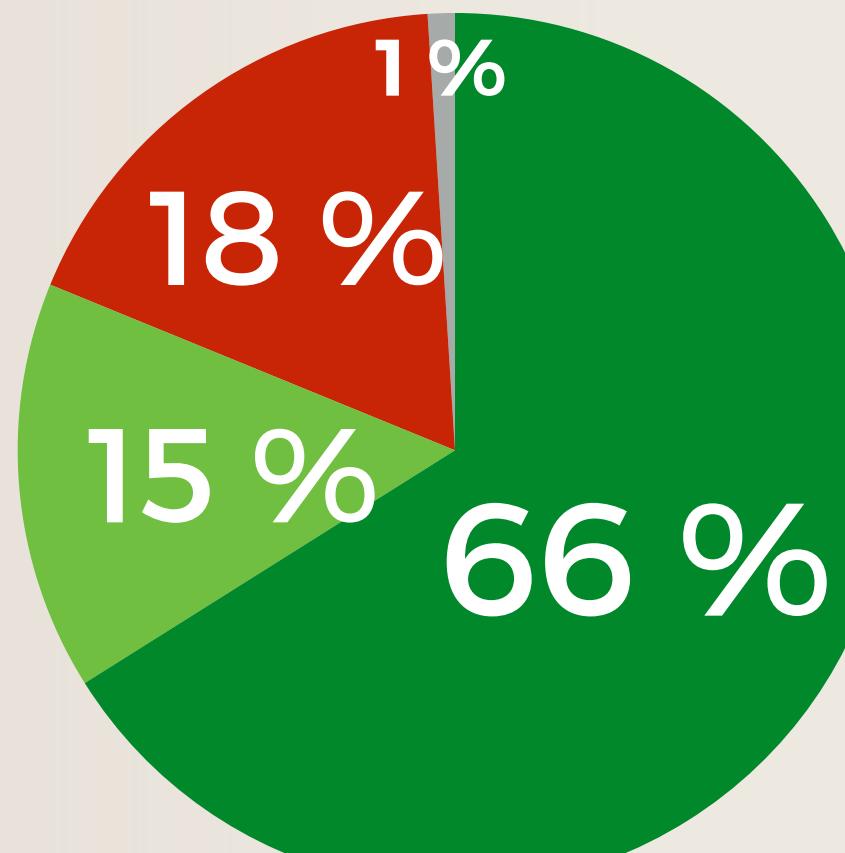




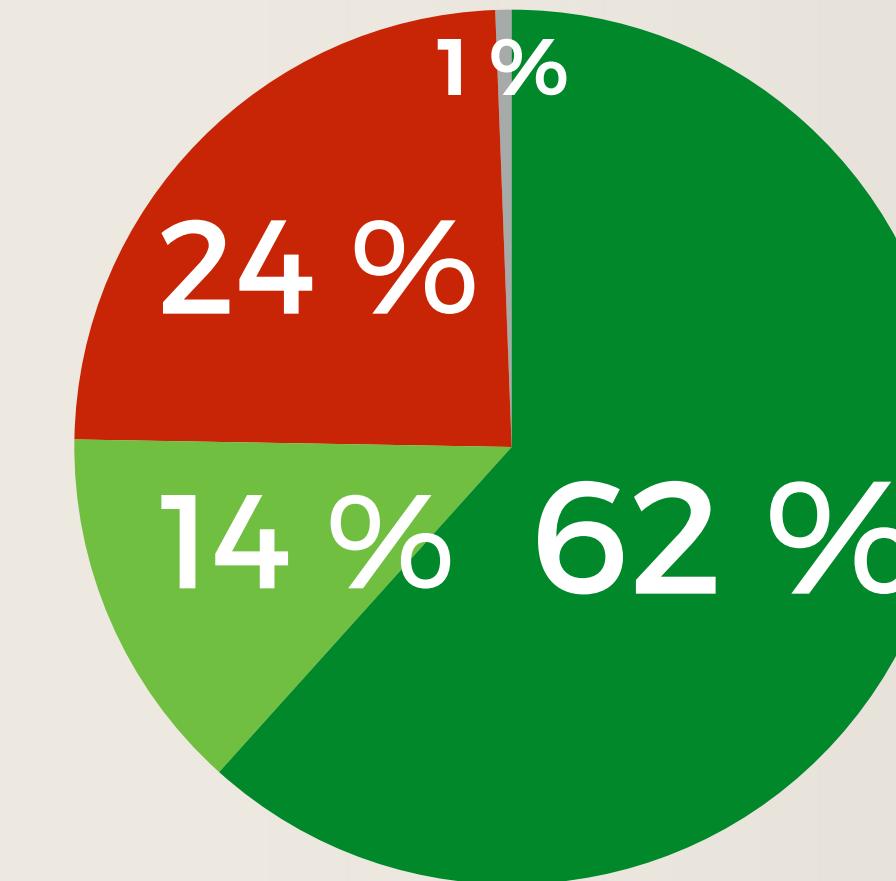
2013



2014

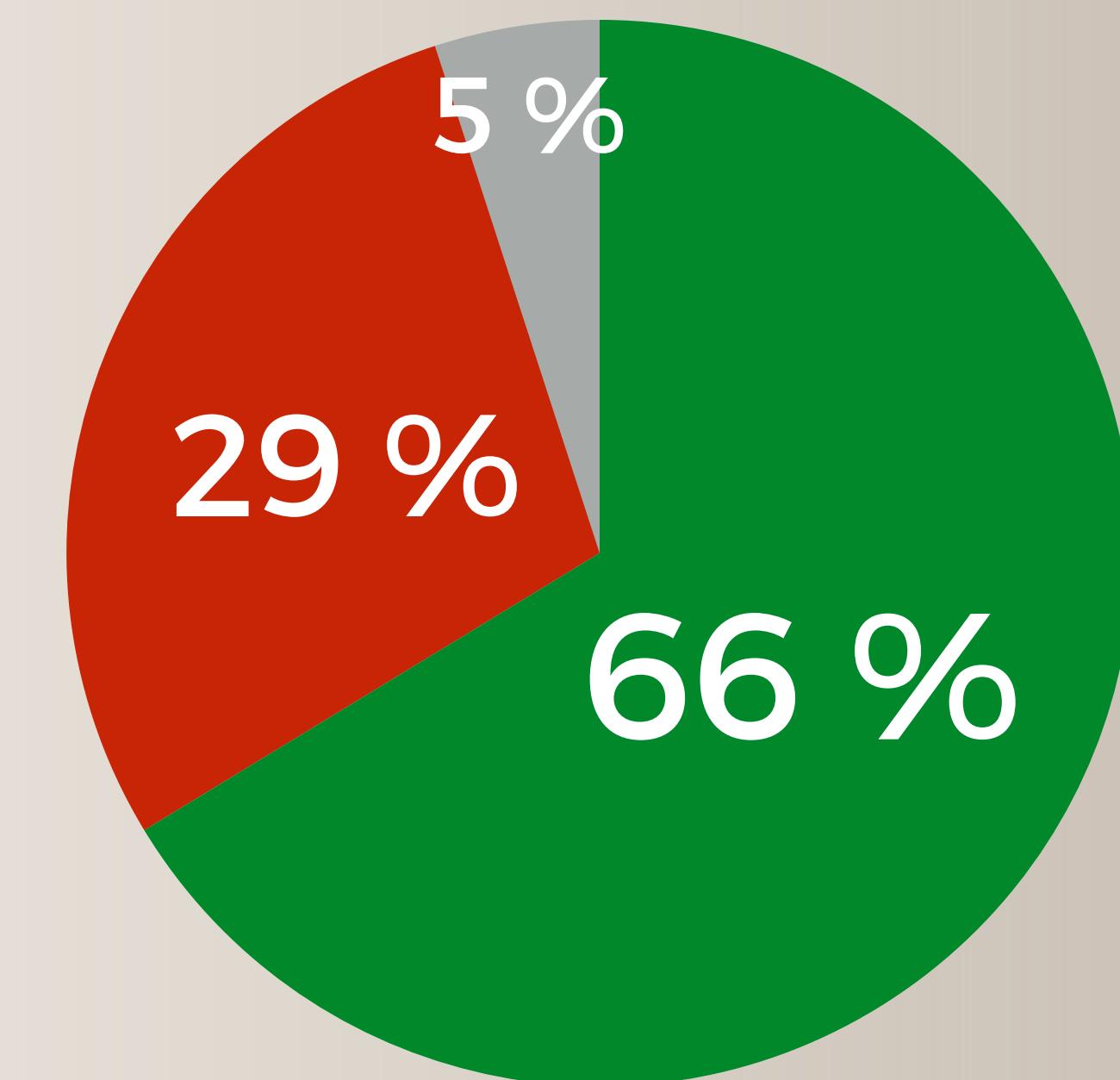


2016



2017

SHARE OF MEMBERS WHO NEVER WORKED  
FROM MORE THAN ONE COWORKING SPACE\*

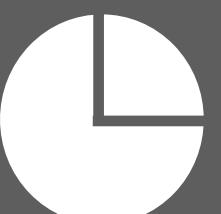


2018

\*IN 2018, THIS QUESTION WAS REPLACED WITH "IS YOUR CURRENT COWORKING SPACE THE FIRST COWORKING SPACE YOU HAVE EVER WORKED AT? THE OPTION "YES, BUT I ALSO WORKED AT OTHER COWORKING SPACES (IN THE PAST)" WAS REMOVED.



YES, BUT I ALSO WORKED AT OTHER COWORKING SPACES\*  
NO      DON'T KNOW & N.A.

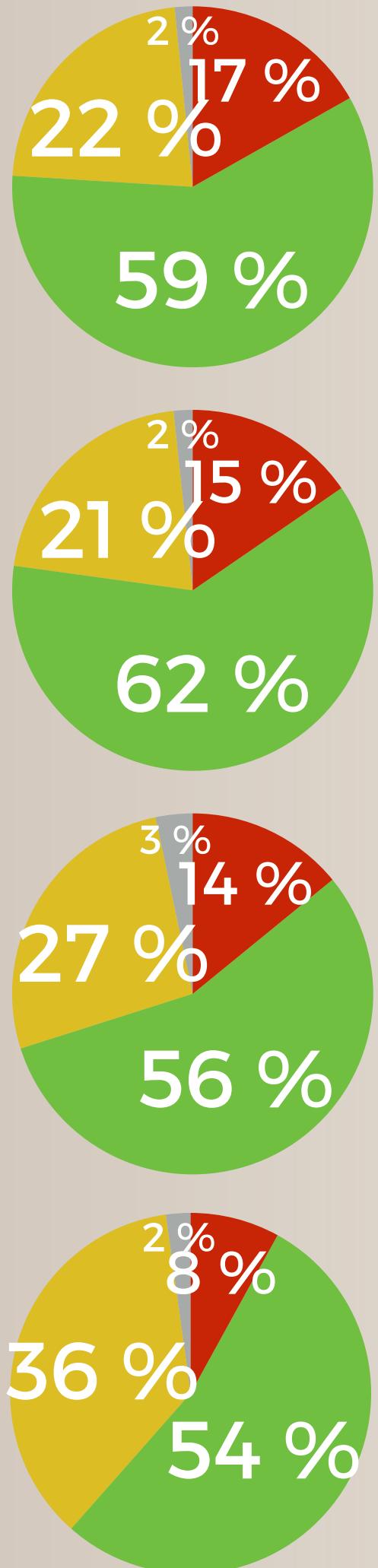


# SATURATION RATE OF COWORKING SPACES IN THE SAME CITY

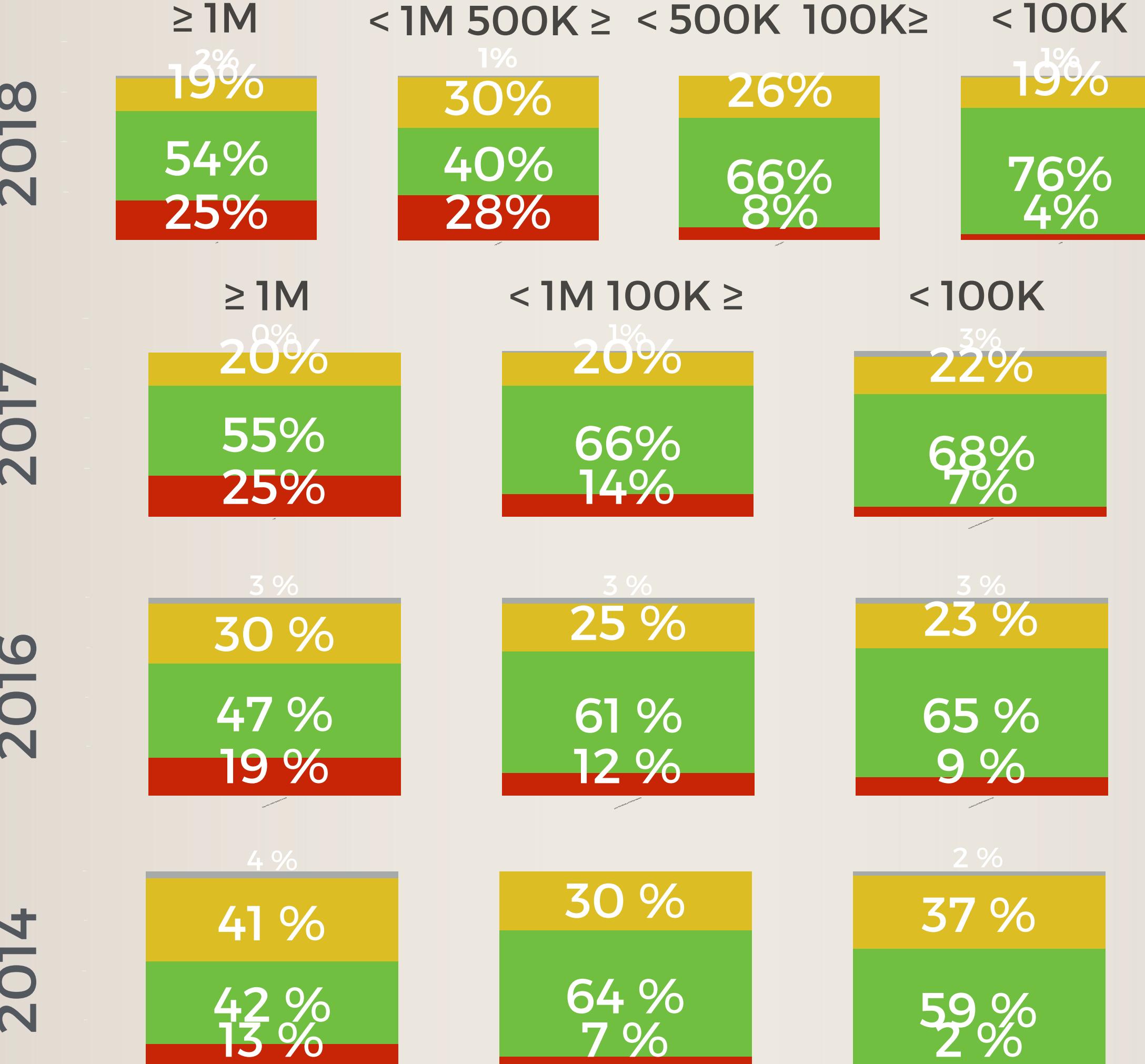
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## GENERAL RESULTS

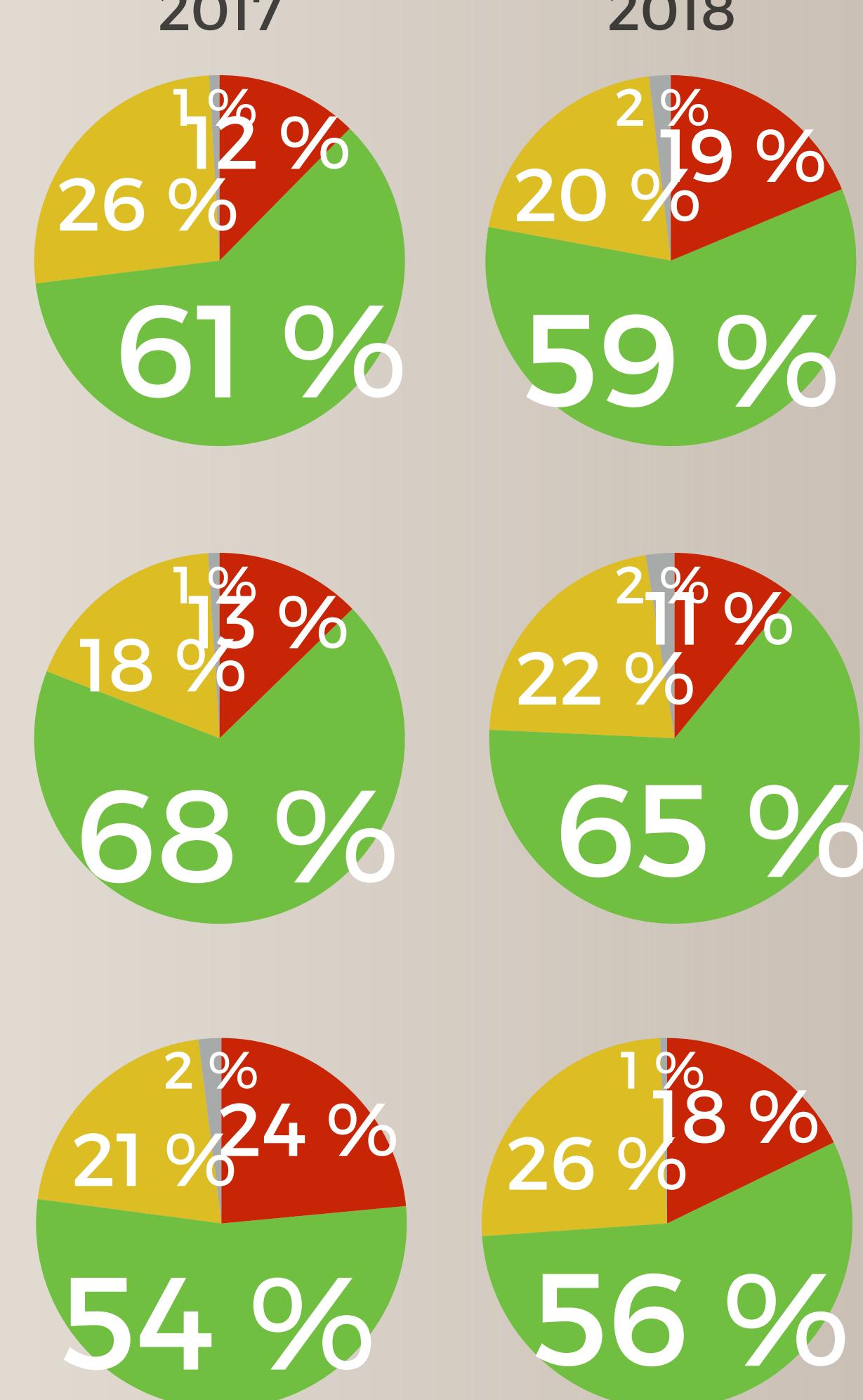
2014 2016 2017 2018



## BY NO. OF INHABITANTS



## BY PROFITABILITY



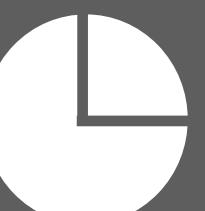
● TOO MANY  
● TOO FEW

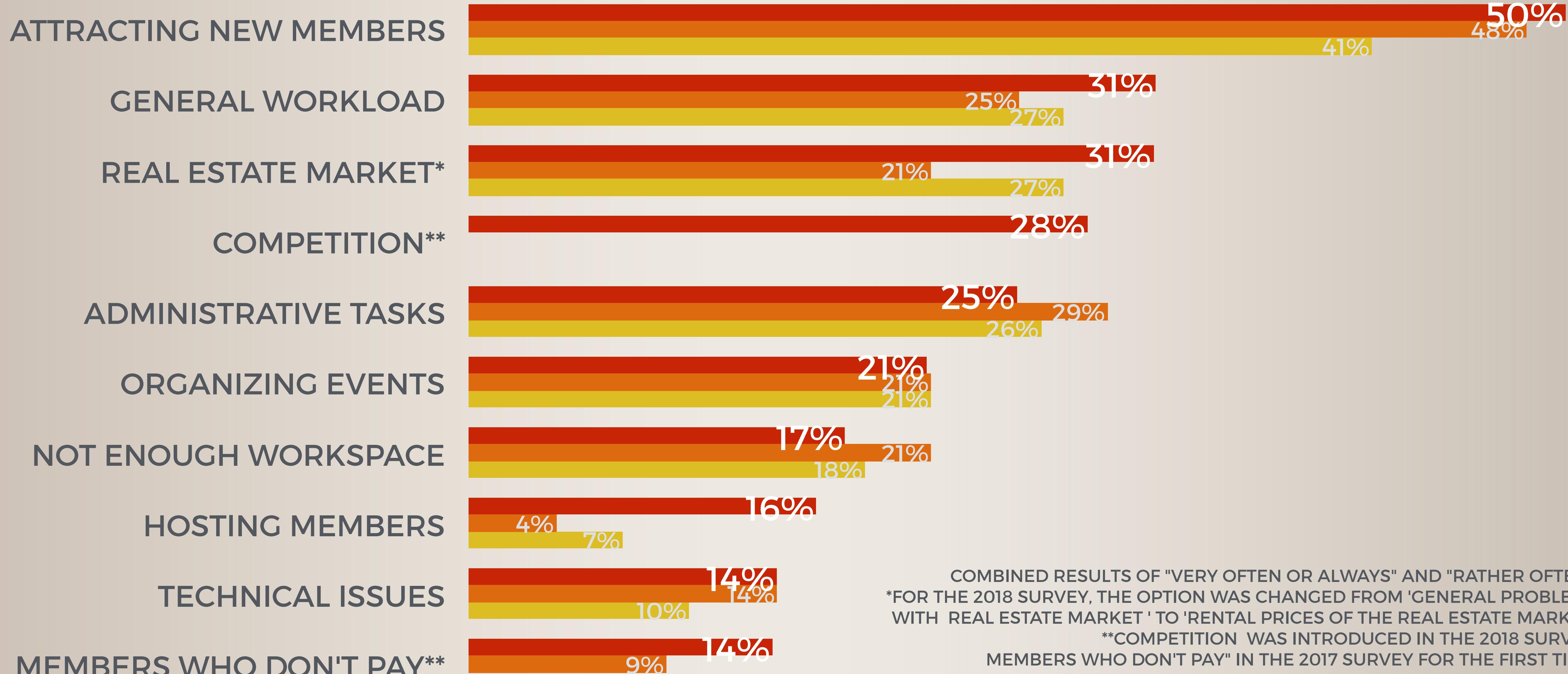
● JUST RIGHT  
● N.A.

REPORTED BY COWORKING SPACES  
QUESTION: "HOW DO YOU RATE THE  
NO. OF COWORKING SPACES IN YOUR  
CITY RELATED TO THE DEMAND?"

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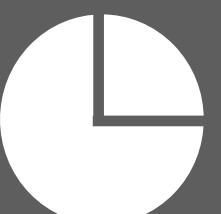


2018

2017

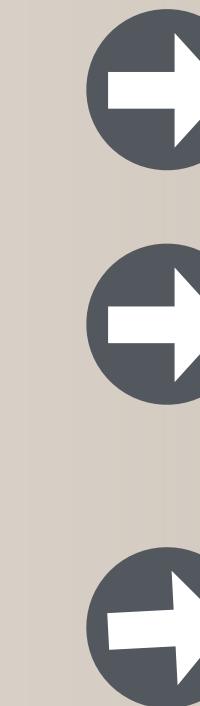
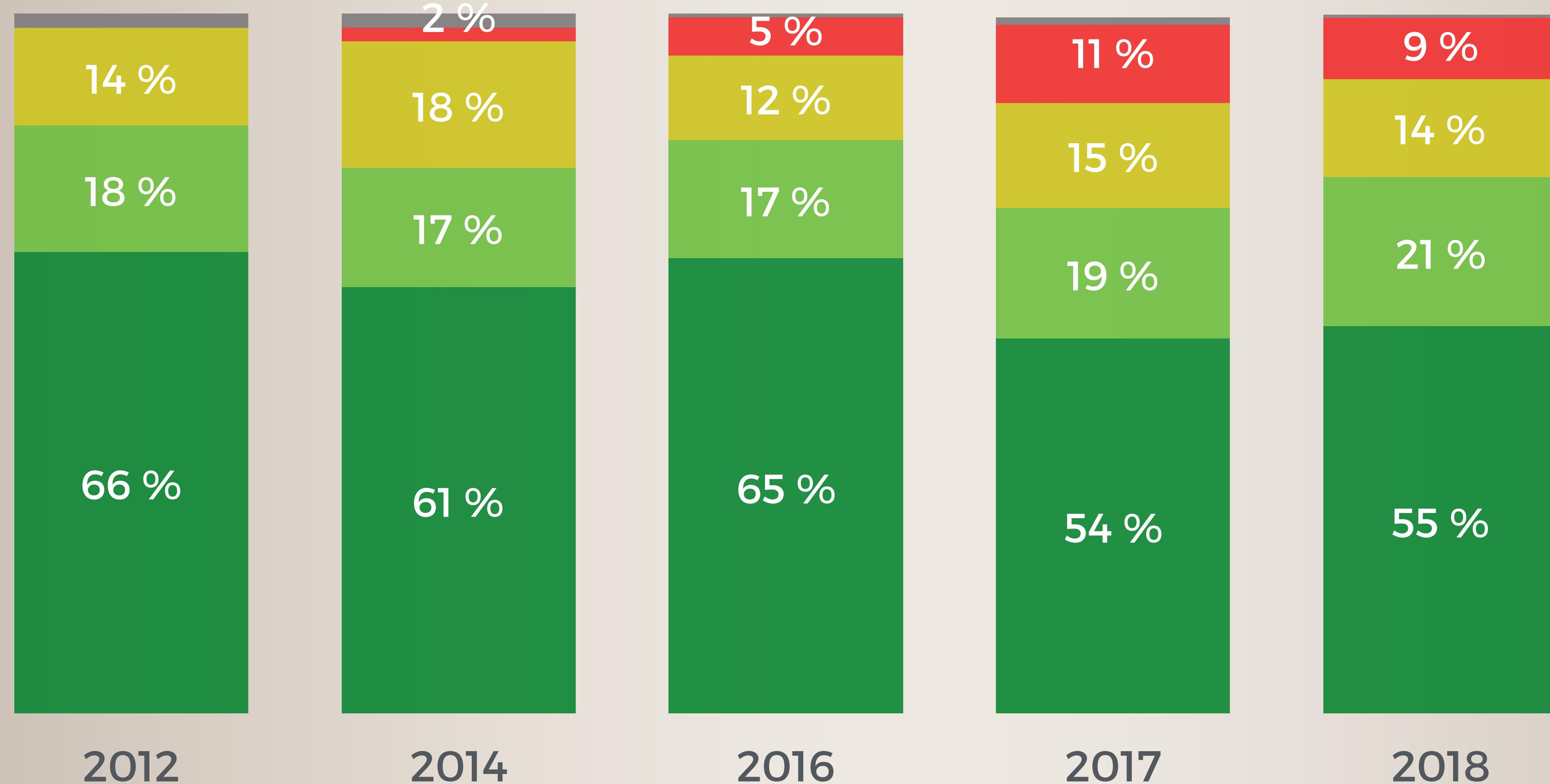
2016

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# HOW LONG MEMBERS WILL REMAIN AT THEIR CURRENT COWORKING SPACE

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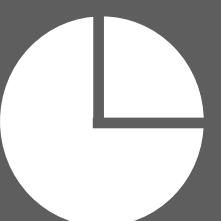
TREND:  
STABLE

■ NOT PLANNING TO LEAVE  
■ REMAIN FOR AT LEAST THREE MONTHS  
■ N.A.

■ REMAIN FOR AT LEAST ONE MORE YEAR  
■ LEAVING WITHIN LESS THAN THREE MONTHS

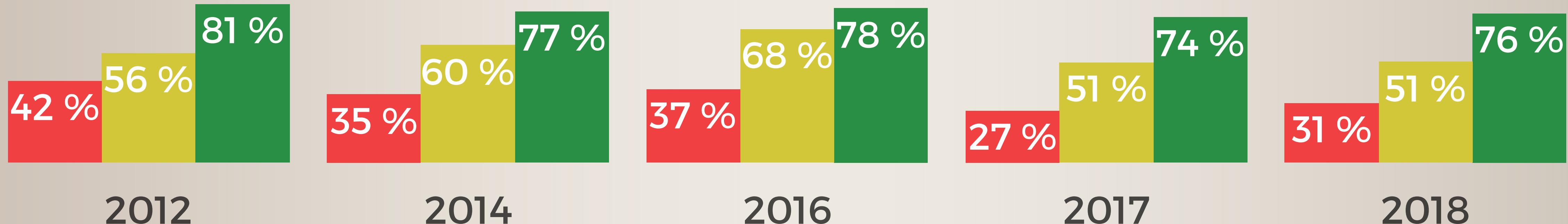
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SURVEY



## BY MEMBER RATINGS OF CURRENT COWORKING SPACES

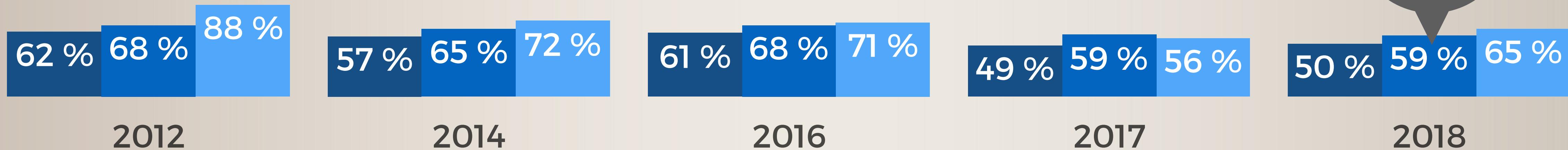
REPORTED BY MEMBERS - RESULTS ARE ROUNDED



- █ COWORKING SPACE WAS RATED LOWER THAN AVERAGE (1 TO 7 STARS OUT OF 10)
- █ COWORKING SPACE WAS RATED AVERAGE (8 STARS OUT OF 10)
- █ COWORKING SPACE WAS RATED HIGHER THAN AVERAGE (9 TO 10 STARS OUT OF 10)

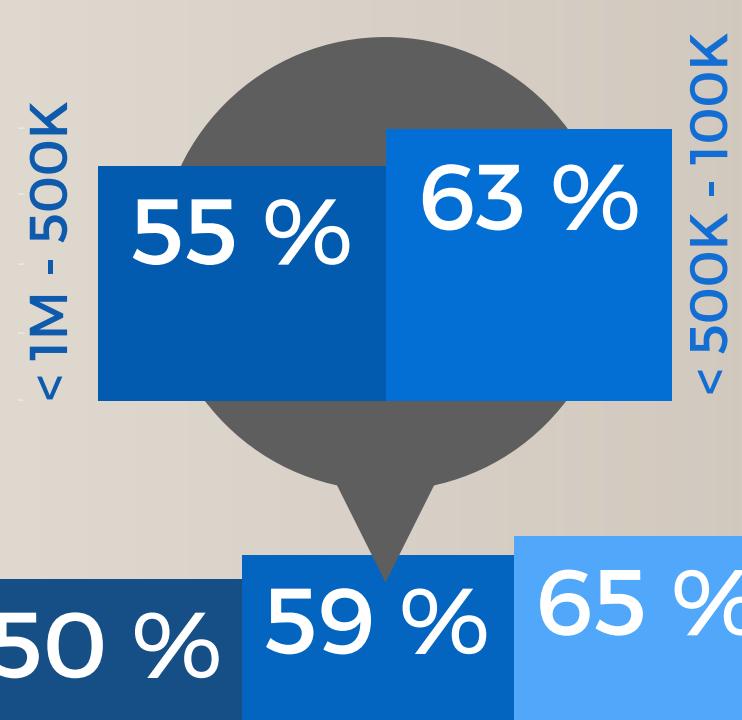
## BY NO. OF INHABITANTS LOCAL TO THE COWORKING SPACE

REPORTED BY MEMBERS - RESULTS ARE ROUNDED

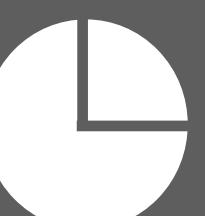


- █ 1 MILLION & MORE INHABITANTS
- █ LESS THAN 100,000 INHABITANTS

█ 999.999 - 100.000 INHABITANTS

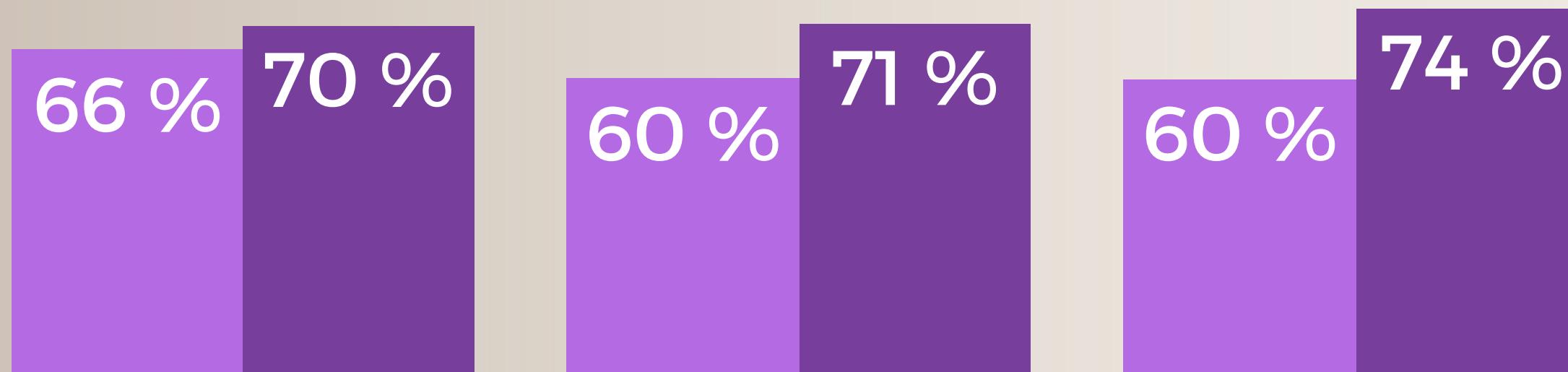


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## BY NO. OF PRESENT MEMBERS WHO WORK AT THE SAME TIME

REPORTED BY MEMBERS - RESULTS ARE ROUNDED



2012

2014

2016

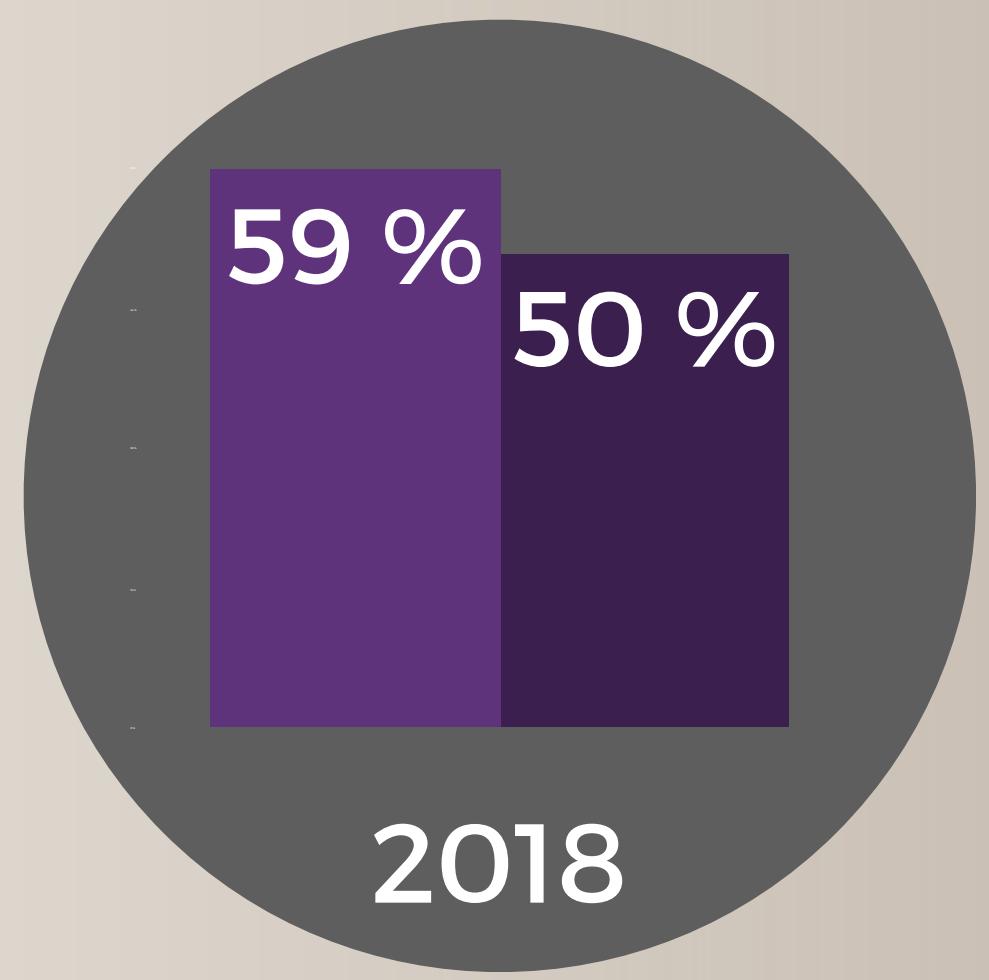
2017

2018

■ UP TO 29 MEMBERS

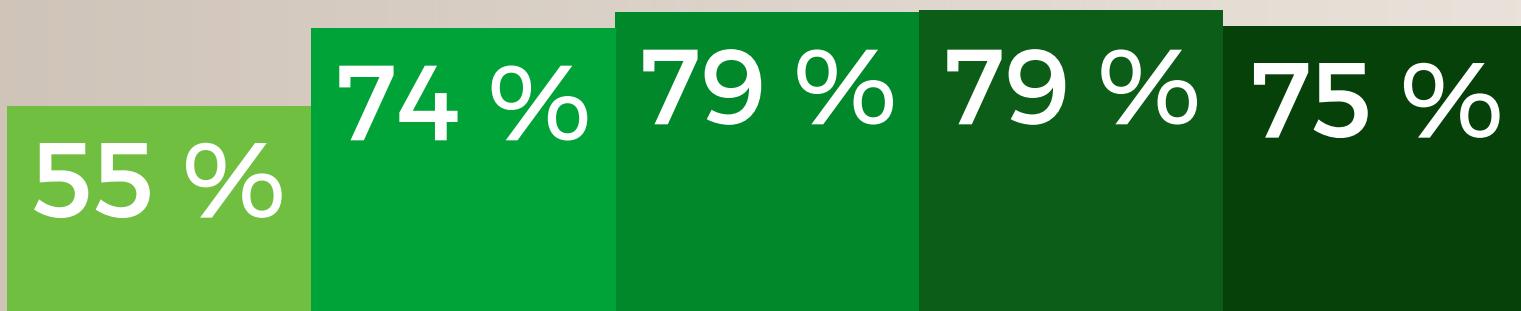
■ 30 MEMBERS & MORE

■ UP TO 49 MEMBERS  
■ 50 MEMBERS & MORE

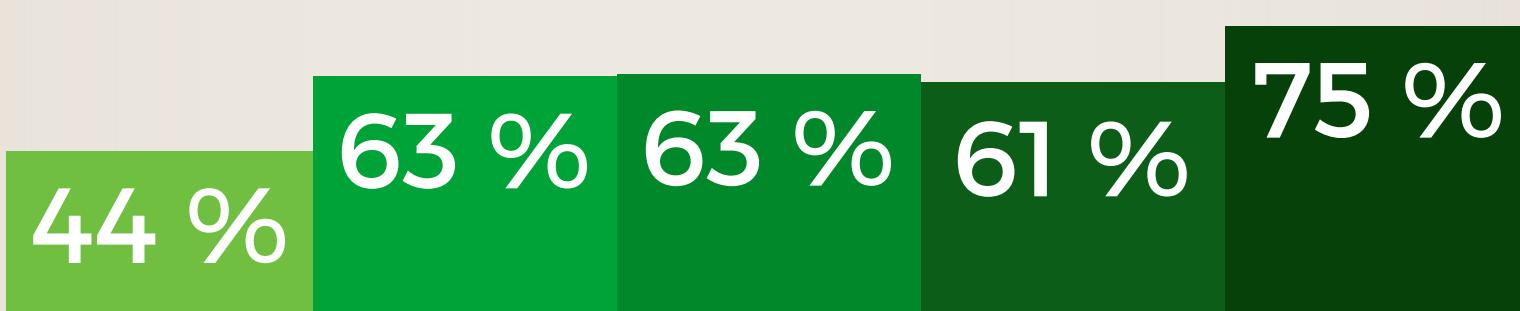


## BY LENGTH OF MEMBERSHIP

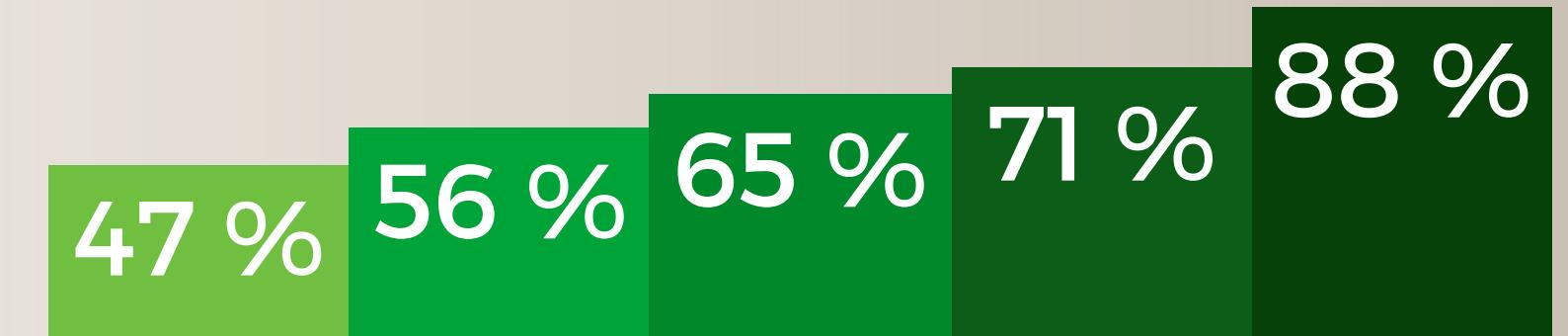
REPORTED BY MEMBERS - RESULTS ARE ROUNDED



2016



2017



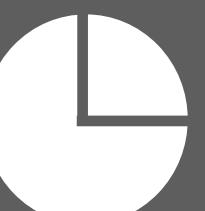
2018

■ UP TO 11 MONTHS  
■ 12-23 MONTHS  
■ 24-35 MONTHS  
■ 36-47 MONTHS

■ UP TO 11 MONTHS  
■ 12-23 MONTHS  
■ 24-35 MONTHS  
■ 36-47 MONTHS

■ UP TO 11 MONTHS  
■ 12-23 MONTHS  
■ 24-35 MONTHS  
■ 36-47 MONTHS

THE 2018  
GLOBAL  
COWORKING  
SURVEY



INTERESTED IN MORE STATISTICS?

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# WHAT ARE THE DIFFERENCES BETWEEN PROFITABLE & UNPROFITABLE COWORKING SPACES?

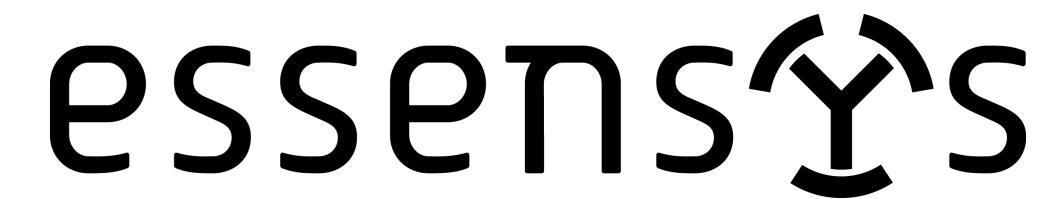
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& RECEIVE THE BOOKLET

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"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."

[nexudus.com](http://nexudus.com)



"Essensys 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."

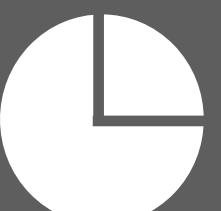
[essensys.tech](http://essensys.tech)



"WUN is consistently the shared space and coworking platform of choice for the largest and fastest growing workspace operators from Premier Business Centers to Quest Workspaces."

[wunsystems.com](http://wunsystems.com)

MAIN SUPPORTERS HELPED DISTRIBUTING THE SURVEY AND FINANCIALLY SUPPORTED THE CONDUCTION OF THE SURVEY.  
DISTRIBUTION PARTNERS HELPED DISTRIBUTING THE SURVEY ON A GLOBAL BASIS..  
OFFICIAL SUPPORTERS HELPED DISTRIBUTING THE SURVEY WITHIN THEIR COWORKING NETWORK.

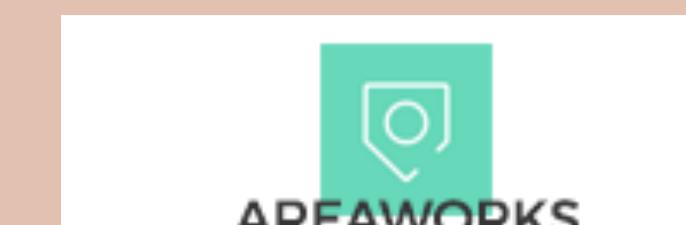
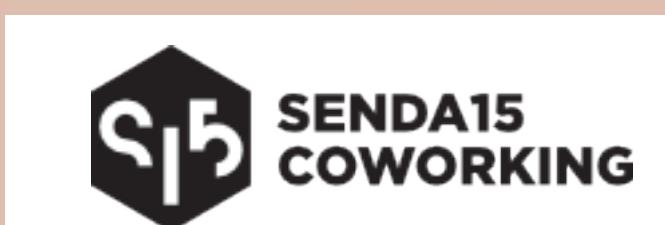
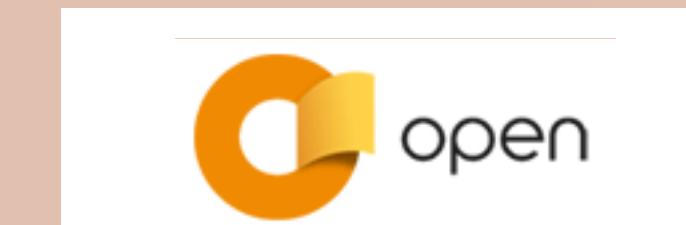
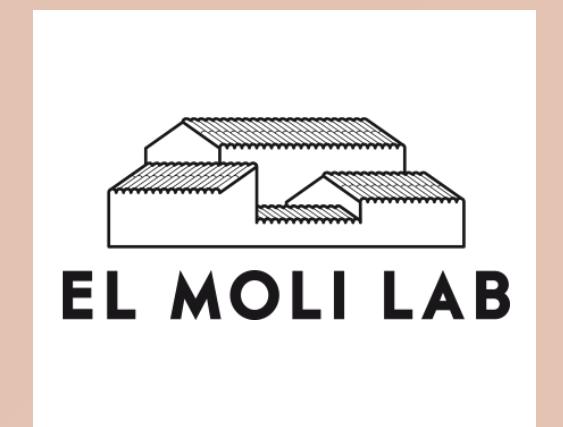
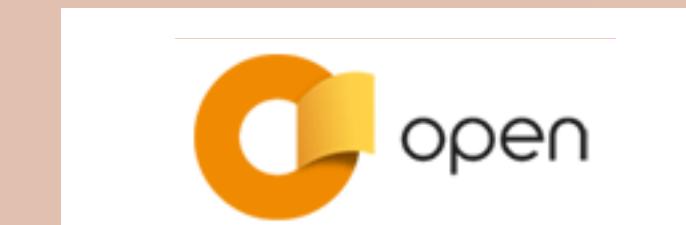
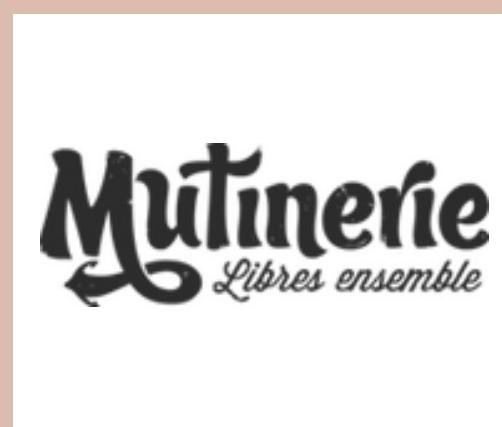




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## OFFICIAL SUPPORTERS



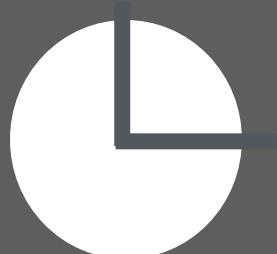
# HOW TO READ THE STATISTICS?

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(ARITHMETIC) MEAN, 5% TRIMMED MEAN, MEDIAN...

WHY ARE THERE SO MANY DIFFERENT AVERAGE VALUES? ISN'T THERE A SIMPLER WAY?

SURE THERE IS! BUT REDUCING A SKEWED DEVELOPMENT TO A SINGLE VALUE WOULD NOT PROVIDE AN ACCURATE REFLECTION OF THE COWORKING LANDSCAPE, WHICH HAS BECOME MORE DIVERSE OVER RECENT YEARS. IN FACT, THE VALUES PRESENTED HEREIN ARE THREE OF DOZENS OF STATISTICAL MEASURES; SO, WE ARE STILL KEEPING IT QUITE SIMPLE. THE (ARITHMETIC) MEAN IS THE MOST COMMON AVERAGE TO REPORT CENTRAL TENDENCIES; HOWEVER, IT IS NOT ROBUST IF IT IS INFLUENCED BY OUTLIERS (EXTREME CASES, WHICH ARE MUCH LARGER OR SMALLER THAN MOST OF THE OTHERS). FOR EXAMPLE, THINK OF AN UNEQUAL DISTRIBUTION OF INCOME, WHERE 10% OF PEOPLE IN YOUR COUNTRY "EARN" 90% OF ALL INCOME. IF YOU TOOK THE MEAN OF THAT INCOME, THE MAJORITY OF PEOPLE WOULD SEE A HUGE GAP BETWEEN THE MEAN VALUE AND THE AMOUNT IN THEIR BANK ACCOUNTS. HENCE, IT UNFORTUNATELY WOULD NOT REFLECT THEIR REALITY. THE COWORKING MARKET IS, OF COURSE, NOT THAT UNEQUAL; HOWEVER, THERE ARE COWORKING SPACES (CHAINS) THAT CAN BE IDENTIFIED AS OUTLIERS, AND ARE MUCH BIGGER THAN MOST OTHER COWORKING SPACES. FOR THIS REASON, WE PROVIDED TWO MORE AVERAGE VALUES: THE 5% TRIMMED MEAN CUTS THE HIGHEST AND LOWEST 5% OF CASES, AND REFLECTS THE AVERAGE REALITY MUCH BETTER THAN THE ARITHMETIC MEAN; THE MEDIAN SEPARATES THE UPPER HALF FROM THE LOWER HALF (IT IS SIMPLY THE VALUE IN THE MIDDLE). IT IS IMPORTANT TO NOTE THAT MOST OF STATISTICS PRESENTED HEREIN ARE GROUPED, AND PRESENT THEIR SHARE TO REFLECT THE WHOLE REALITY.



# HOW TO READ THE STATISTICS?

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HOW ARE THE (ARITHMETIC) MEAN, 5% TRIMMED MEAN, AND MEDIAN CALCULATED?

THE (ARITHMETIC) MEAN IS THE SUM OF A COLLECTION OF NUMBERS DIVIDED BY THE NUMBER OF VALUES IN THE COLLECTION. CONFUSED? IMAGINE YOU HAVE TEN NUMBERS... NOW ADD THEM UP, AND THEN DIVIDE BY TEN:

$$1 + 2 + 3 + 4 + 4 + 5 + 5 + 6 + 9 + 19 = 58/10 = 5.8$$

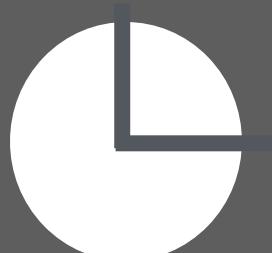
THE 5% TRIMMED MEAN FIRST REMOVES THE HIGHEST AND LOWEST 5% OF A COLLECTION OF NUMBERS, ADDS UP THE REST, AND DIVIDES THIS TOTAL BY THE NUMBER OF VALUES IN THE COLLECTION:

$$1 + 2 + 3 + 4 + 4 + 5 + 5 + 6 + 9 = 38/8 = 4.75 = 4.8 \text{ (ROUNDED)}$$

THE MEDIAN IS THE MIDDLE NUMBER OF A COLLECTION OF VALUES. IT DIVIDES THE UPPER HALF BY THE LOWER HALF. IN THIS CASE, WE HAVE AN EVEN NUMBER OF VALUES (TWO MIDDLE NUMBERS), WHICH ARE ADDED UP AND THEN DIVIDED. THIS GIVES A FULLY TRUNCATED OR TRIMMED MEAN:

$$1 + 2 + 3 + 4 + 4 + 5 + 5 + 6 + 9 + 19 = (4 + 5)/2 = 4.5$$

SIDE NOTE: THE GREATER THE DIFFERENCE AMONG THE VALUES, THE GREATER THE COLLECTION OF UNEQUALLY DISTRIBUTED VALUES. IF YOU'D LIKE TO CONSIDER ONLY A SINGLE NUMBER, GO WITH THE 5% TRIMMED MEAN. HOWEVER, IT'S BETTER TO USE THE SHARE OF GROUPS PRESENTED IN THE CHARTS.



PARTICIPANTS: 2011-12: 913, 2012-13: 1206, 2013-14: 1270, 2015-16: 1679, 2016-17: 1876, 2017-18: 1980

IN ORDER TO SIMPLIFY THE PRESENTATION, 2017-18 RESULTS ARE REFERRED TO BY THE YEAR 2018, WHILST 2016-17 RESULTS ARE REFERRED TO BY THE YEAR 2017 AND SO ON. THIS IS BECAUSE THE SURVEY HAS ALWAYS BEEN CONDUCTED AT THE END OF EACH YEAR.

THE 2018 GLOBAL COWORKING SURVEY RAN FROM NOVEMBER 8, 2017 - JANUARY 30, 2018.

FINAL RESULTS ARE ANALYZED USING A COMPLEX STATISTICAL TOOL, AND ARE CHECKED USING QUALITY STANDARDS. IT IS FOR THIS REASON THAT THE FIRST AND FINAL RESULTS MAY DIFFER SLIGHTLY. FINAL RESULTS ARE ALSO GROUPED BY DEMOGRAPHIC CATEGORIES & OTHER CRITERIA USING A BI- OR MULTIVARIATE ANALYSIS. READ THE RELATED ARTICLE AT [BIT.LY/2018FORECAST](http://bit.ly/2018forecast)

INTERESTED IN REGULAR UPDATES RELATING TO THE GLOBAL COWORKING SURVEY?

JOIN OUR NEWSLETTER!

ANY QUESTION? DROP A LINE TO [SURVEY @ DESKMAG.COM](mailto:SURVEY@DESKMAG.COM)

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WOULD YOU LIKE TO SUPPORT THE GLOBAL COWORKING SURVEY  
AND RECEIVE MORE STATISTICS?

YES, GIMME MORE STATS!

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