

Coworking by the Numbers

The Results of the 2015 GCUC/Emergent Research
Coworking Survey

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Coworking Spaces: Where Work and Life Blend

The boundaries between our work lives and personal lives are becoming increasingly permeable; we no longer rigidly split up our time between “work hours” and “non-work hours”.

As this line blurs, we need new ways of maintaining balance.

Coworking

Coworking at NeueHouse



Why do they come?

Coworking Spaces Are Workspaces

- 84% said they were more engaged and motivated when coworking
- 67% said coworking improved their professional success
- 69% said they feel more successful since joining a coworking space
- 64% of the respondents said their coworking networking was a very important (26%) or an important source of work (38%)



WORKBAR Cambridge

Coworking Spaces Are Networking and Social Spaces

- 87% report they meet other members for social reasons
 - 54% after work and on weekends
 - 33% during work hours
- 82% said coworking has expanded their professional networks
- 80% said they turn to other coworking members for help, guidance or to find/source work



Creative Density Picnic

Coworking Spaces Are Learning Spaces

- 69% reported they learned new skills
- 68% reported they improved their existing skill set
- 67% reported they attend events at their coworking space occasionally (45%) or often (21%); only 4% said they never attend events



The Factory, Grand Rapids

Coworking Spaces Make You Happier

- 89% reported they are happier
- 83% reported they are less lonely
- 78% reported that coworking helps keep them sane



New Work City

Coworking Members Are Highly Satisfied

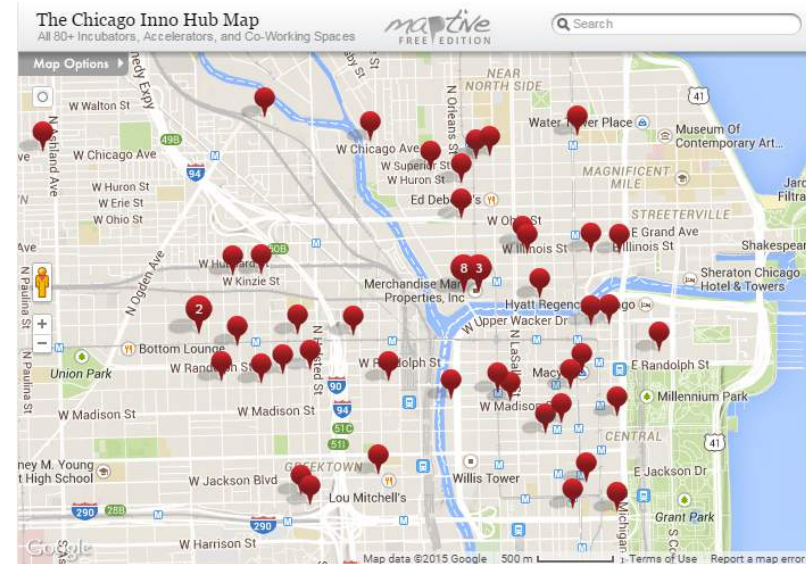
- Average satisfaction score of 8.2 out of 10
- 90% reported being either highly satisfied (79%) or satisfied (11%) with their coworking space. Only 5% reported being dissatisfied
- 74% reported they definitely (30%) or probably (44%) will still be a member in 2 years. Only 4% said they would not
- 94% reported the price they paid was fair (77%) or a bargain (17%). Only 5% reported it was too high



Happy Hour at SoTechie Spaces

Location, Community Managers, People

- 95% said location was very important (68%) or important (27%). 0% said it was not important
- 83% said the community manager was very important (43%) or important (40%)
- 82% said the people in the space were very important (39%) or important (43%)
- 73% said interior design was very important (26%) or important (47%). Women ranked this much higher; millennials ranked it much lower



Coworking Spaces in Downtown Chicago

Women Are More Collaborative Than Men

- 76% of women say they turn to other members to help solve work challenges versus 54% of men
- 52% of women say they regularly bounce ideas off other members versus 42% of men
- 72% of women rate access to conference rooms as very important (38%) or important (34%) versus 52% for men (24% very important, 28% important)
- 83% of women rated being part of community very important (38%) or important (45%) versus 69% of men (30% very important, 39% important)



Hera Hub

Key Differences by Age

Millennials (aged 21-34) reported the biggest gains from networking:

- 86% said social networks expanded versus 75% of non-millennials
- 88% said professional networks expanded versus 77% of non-millennials
- 79% said they collaborate more versus 61% of non-millennials

Gen Xers (aged 35 to 49) least likely to socialize; highest earning:

- 41% said they only socialize at work versus 29% of non-Xers
- 28% reported 100k+ incomes versus 16% for non-Xers

Baby Boomers (aged 50-68) most satisfied and spend the least amount of time in their coworking space:

- Average satisfaction score of 8.6
- Average 18 hours per week in their space versus 25 for non-baby boomers
- Consistently commented the price was too low

Space Usage

- Average member works 23 hours per week onsite and visits about 3.5 days per week
- Average member is slightly more likely to be at the coworking space in the afternoon than morning; 23% report working regularly at night (after 5:00 PM)
- 64% report their coworking space is their primary workplace; 27% report home is their primary workplace; 9% other (client site, employer site, etc.)



Office Nomads, Seattle

Independent Workers and Company Employees

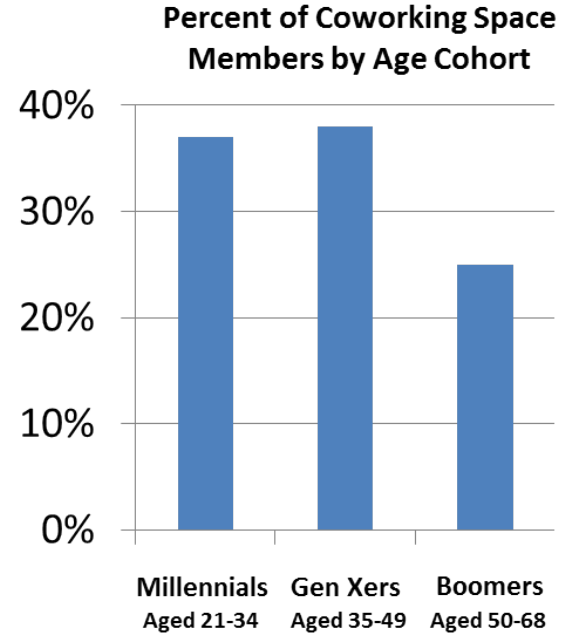
- Independent workers (freelancers, etc.) are more collaborative, more satisfied and less lonely than company employees:
 - 76% said they collaborate more versus 54% for employees
 - 89% said their social networks expanded versus 68% of employees
 - 9.1 average satisfaction versus 7.9 for employees
 - 91% said they were less lonely versus 72% of employees
- Company employees more likely to hire other coworkers, spend more time in the space and socialize after work:
 - 52% of employees said they often (14%) or sometimes (38%) contract with other coworking space members for work versus 38% of independent workers (9% often, 29% sometimes)
 - Employees average 26 hours per week working in their coworking space versus 20 hours for independent workers
 - 59% of employees meet with coworkers after work or on weekends versus 48% of independent workers



CoPlace, Belgium

Demographics

- Average age is 39.
 - 20% under 30
 - 7% older than 60
- 52% male, 48% female
- 92% North American, 8% ROW
- 51% independent workers, 49% company employees:
 - 35% work for a small business/startup
 - 9% work for companies with more than 100 employees
 - 5% work for non-profits
- Average and median income between \$50-75k
 - 19% greater than \$100k
 - 20% \$25k or less



Applying What We've Learned

Different segments see coworking and coworking's value in different ways, but 3 key attributes of coworking space membership are consistently cited as being valuable by members:

1. A work environment that expands their networks, leading to greater professional success.
2. A social environment that improves their life.
3. A workplace where they're engaged, motivated, learning and growing.

Even in the context of talking about facilities and infrastructure the data is clear:
People value **human space** far above **office space**.



INTRODUCING
COTIVATION

what's holding you back?

Join us for an information session on Thursday, March 5
at 3:00 PM at the Factory. Let's get cotivated!

Brought to you by Factory member Laura Kopp.

Total – 3 Words Describing Coworking



Top 4 – Community, Collaboration, Fun, Social

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