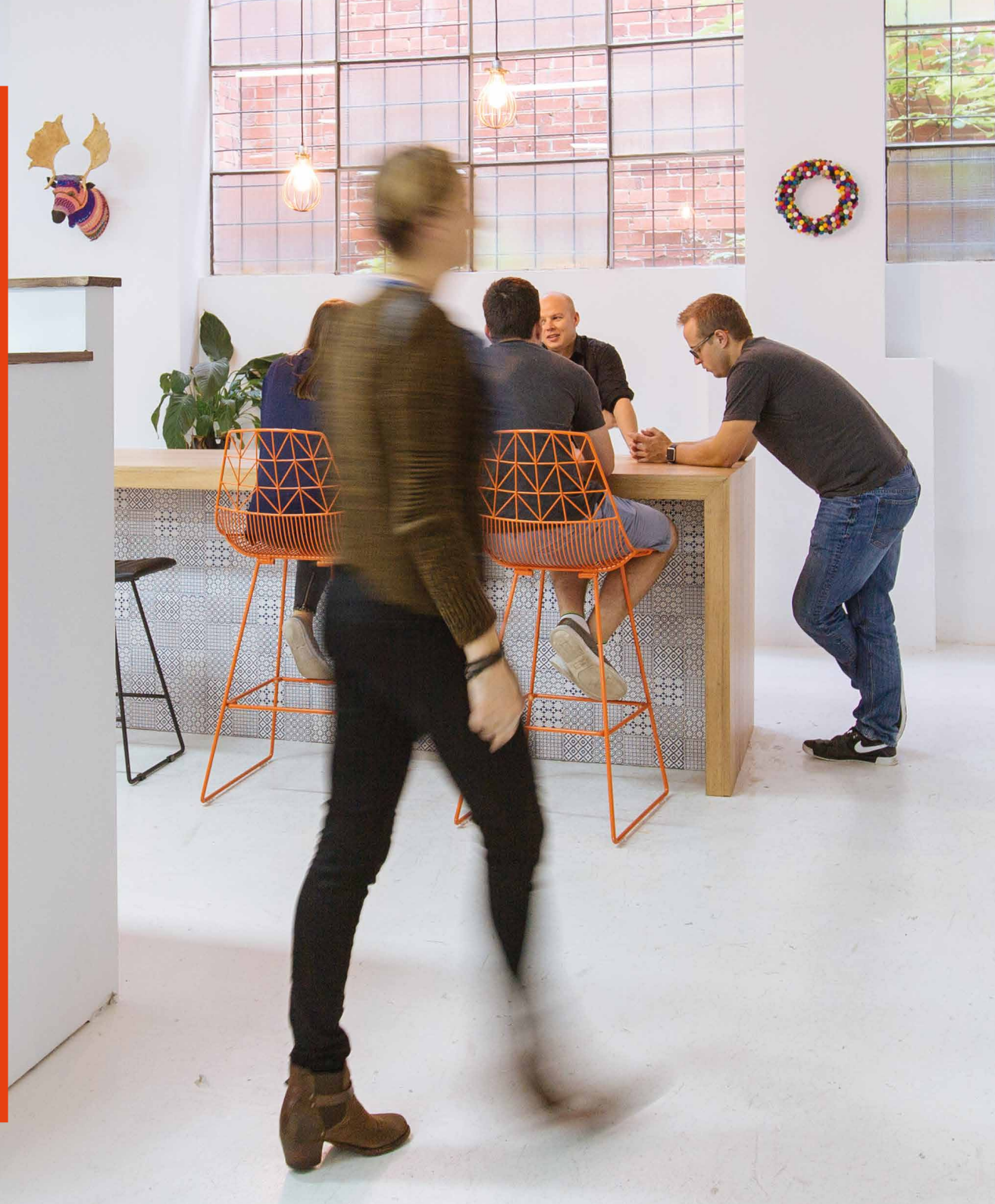# Coworking Spaces Australia

The new places where people work, businesses grow, and corporates connect.

An introduction to the growing coworking industry in 2017

THE UNIVERSITY OF
SYDNEY
—
Business School

Sydney
Business
Insights_

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This report is a publication of Sydney Business Insights and the Digital Disruption Research Group (DDRG) at the University of Sydney Business School.

The Digital Disruption Research Group (DDRG) brings together colleagues from academia and industry who share an interest in the wider topic areas of technology in business and the future of business and work. The DDRG is open to a wide range of topics and approaches sharing an interest in investigating and exploring the particular nature and characteristics of disruptive change and its implications for business practice. The research group is open to like-minded colleagues who want to be involved in researching such issues with an interest beyond the immediate everyday set of problems. We generally take a balanced and critical view of technology and aim to look beyond any hype of the day. The group has become a vibrant meeting space for colleagues to discuss and link their individual research initiatives, for exploring new ideas and establishing new research projects, formulating and disseminating ideas. We are equally interested in 'doing' as we are in 'thinking'.
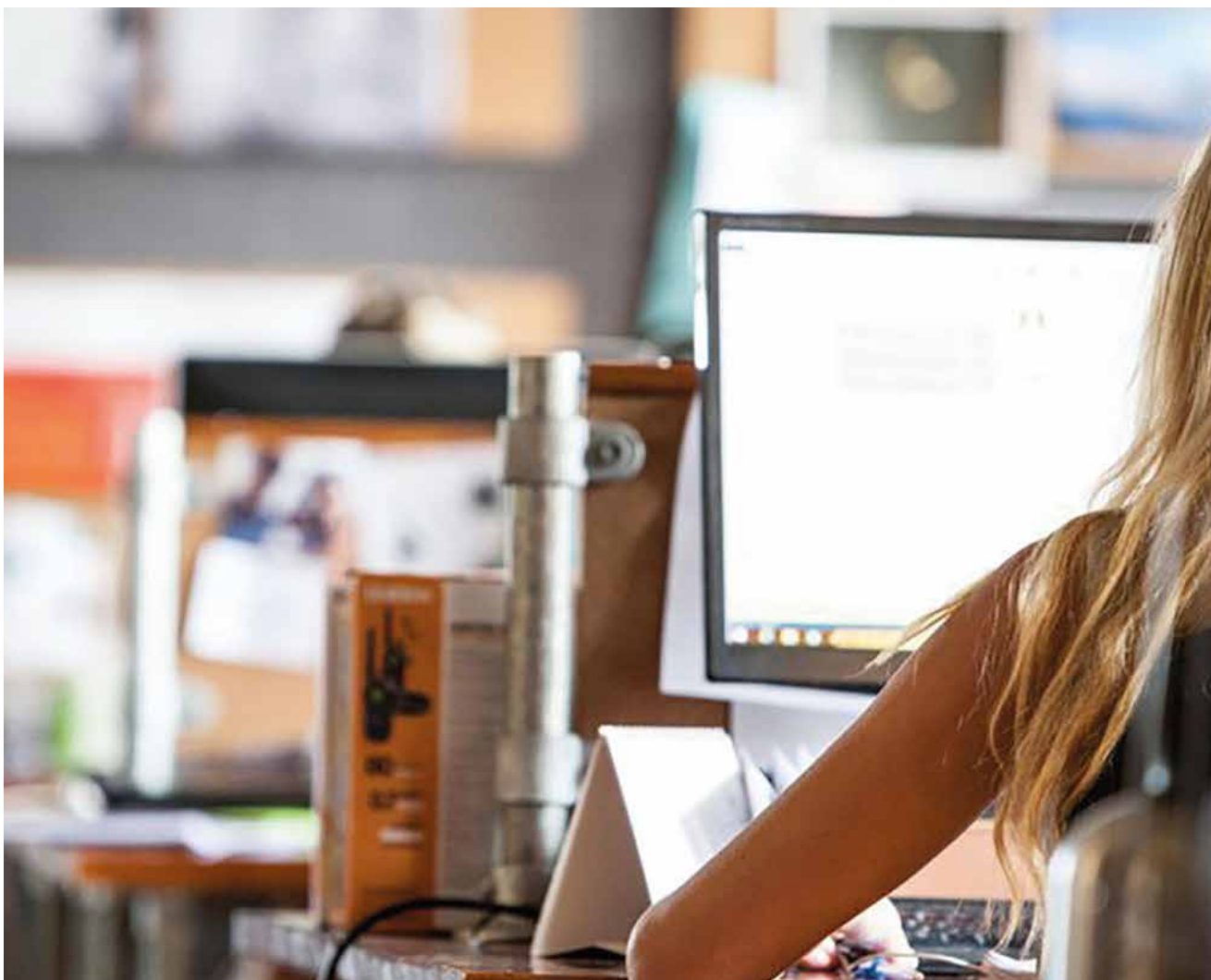
Download and link to the report here:
http://sbi.sydney.edu.au/coworking-spaces-australia/

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Image: Your Desk, Sydney **yourdesk.com.au**

Executive overview

In 2005, a new form of working was conceived when a small group of individuals from creative industries came together in an experiment to work alongside each other in an open and shared space called Spiral Muse in San Francisco[1]. This marked the birth of the coworking space.

Today, the number of coworking spaces exceed 10,000 worldwide[2]. They come in all shapes and flavours, and cater to a diverse range of small business owners, freelance professionals, and corporates.

Coworking spaces are often the spiritual home of successful start-ups, the digital disruptors, the corporate changemakers, and social visionaries. This is where new business models are incubated, nurtured, developed and discovered by investors.

In this report we ask: What can be learned from coworking spaces about how to facilitate new ways of working with a view to increase collaboration and innovation? How can the various models be harnessed by small businesses and corporates to drive growth and efficiency?

Well-run coworking spaces provide insight into how our workplaces could be if they were more innovative and collaborative, supporting their people to work autonomously, flexibly and courageously.

The stereotypical coworking space may be envisaged as the opposite to traditional corporate work spaces, with a focus on technology, socialising, and informal 'play' spaces. However, new and more sophisticated coworking spaces that have emerged providing concepts more relevant to larger organisations.

The purpose of this report is to provide an introduction to the coworking phenomenon, an overview of the state of coworking in Australia, introducing a taxonomy of different types of coworking spaces, and some learnings about how to translate the concept of coworking into more traditional small business and corporate work realities.

Definitions

Coworking The practice of working alongside people with whom one shares a workplace but not necessarily an organisational affiliation.

Coworking spaces Places shared by people from different organisations, often freelancers, who work alongside each other, share infrastructure and often engage in joint activities associated with learning, innovation and collaboration.

The future of work: a diversified phenomenon

Workplaces are undergoing significant change, fuelled by organisational demands for efficiency, the need to build a culture of innovation, the quest for attracting and retaining talent, and shifting expectations about how and where employees desire to work. A number of key drivers contribute to the transformation of work and workplaces:

Digital technology

Digital technologies, such as mobile devices and social media, increasingly shape where and how work gets done, and even what counts as work in the first place.

While technology has always carried the promise to unshackle us from the confines of working at the desk and office, mobile technology has only recently made "work from anywhere" a reality. Conversely, social media holds the promise to create cohesive social and team structures, enabling collaboration between people across time and space.

At the same time, it is increasingly obvious that "going to the office" has other important qualities, such as being part of a community of people who exchange ideas and facilitate learning and co-creation, and thus spur innovation. For many knowledge workers today, coworking spaces offer the flexibility to combine the liberty of mobile work with the community connectedness and shared identity found in traditional offices.

Emerging new technologies are also bringing down the costs of setting up a small business through the proliferation of DIY websites, social media for communication and online business services such as banking. In fact, it has never been easier for professionals to set themselves up to work independently outside of the confines of a large organisation, which is spurring a rise in freelancing.

The rise of the freelancer

Australia counted just over one million independent contractors in August 2015, making up nearly 10% of all employment; a quarter of which were professional services workers[3]. In addition, there is evidence of a continuing trend towards part-time employment which exceeds growth in full time jobs[4]. Overall, it has been estimated that around one third of the Australian workforce performs some form of freelance work[5].

Large professional service organisations, such as Deloitte Australia, recognise that freelancers, contract and independent workers are becoming a more sizeable part of the workforce, boosting organisational capability. Engagement with this "contingent workforce" allows large organisations the ability to respond more flexibly to their clients' needs[6].

Finally, recent surveys indicate that around a third of our future workforce, the millennials, have a strong preference for freelance work due to perceptions of superior work satisfaction and opportunities[7].

Coworking spaces have become an integral part of this shift to more flexible and independent work arrangements. They offer a work community that increases the chances of securing business through a professional network and word of mouth referrals. They further reduce the financial barriers for freelancers and small businesses to set themselves up in proximity to where their target clients reside or work, in cities and large regional centres.

[3] ABS 2016 [4] ABS 2017 [5] Upwork (formerly Elance oDesk) 2015 [6] Deloitte Human Trends 2015 [7] Deloitte Millenial Survey 2017

New ways of working

Driven by the realisation that creative professional work requires more than just a desk or being online, organisations are engaged in a multitude of initiatives to reimagine where and how work gets done.

Flexible work arrangements today go beyond more traditional telework setups that allow employees to combine in-office work with work from home. While such setups were often still tightly controlled in terms of both IT environment and work management, recent moves to more outcome-based work appraisals are making it possible to further decouple 'work' from a particular 'place'. Further driven by economic rationales, businesses have begun to rethink how they make use of their expensive inner city real estate to best facilitate work, by doing 'more with less'.

Activity-based working (ABW) describes a way to design office space around different kinds of activities, or 'how' work gets done. In ABW spaces, employees no longer 'own' a particular space but rather select spaces suitable to the work task at hand. Importantly, ABW goes beyond mere "hot desking", but rather offers a range of configurations geared towards different activities: creative team collaboration, meetings, quiet work, reflection, rest, and integrating work space with hospitality offerings such as cafes. It also allows people to work off-site, while staying connected online. Underpinning such initiatives is a philosophy that workspaces should support the diversity of people's ways of working, and that empowering workers by matching the environment to their work will lead to productivity gains, and also ultimately more effective talent attraction and management.

Many coworking spaces embody ABW, with large open spaces hosting a variety of individual and group work settings, providing a model for larger organisations to rethink their own workspaces. In addition, coworking spaces also offer opportunities for corporations to act as 'spill over' spaces for their own ABW initiatives, with some corporates going so far as to sponsor coworking spaces to offer their employees additional flexibility.

Aspirational culture

Many organisations attempt to harness collaboration and innovation through various workplace transformation projects, with a desire to emulate the creative workplace culture of companies such as Google or Facebook.

Too often however, the associated change projects are focused predominantly on changing the physical work spaces, e.g. to facilitate ABW. Unfortunately, such "build it and they will come" approaches often jump too short. As a result, the organisation's existing culture persists, work practices do not adapt to the new environment, and the intended outcomes never materialise. Employees can also grow more cynical in the face of misguided transformation initiatives.

On the other hand, when change management is done well, organisations look beyond just physical changes to ways of enhancing the work experience of their employees. Increasing personalisation of work experience helps workers to satisfy their needs for meaningful and purposeful work, particularly for younger workers for whom this is increasingly important. As a result, some organisations are beginning to show a renewed awareness of the social impact of work in people's lives.

Coworking spaces offer insight into ways to foster meaning and purpose in the work environment. They highlight the importance of building a sense of community through rituals, events, and a myriad of experiences, and how culture manifests beyond the physical layout and corporate messaging.

Corporates, government agencies, and non-profit organisations are tapping into coworking spaces as a way to inspire their employees, fostering their organisation's entrepreneurial spirit through a range of innovation events, such as hackathons or hosting inspirational guest speakers.

How coworking works

Coworking spaces initially emerged as places where people from creative industries could work alongside each other in an open shared environment. They have mushroomed over the last decade due to a growing number of freelancers, entrepreneurs and technology-savvy small business owners who are looking for a more practical and professional alternative to working from home or out of coffee shops. Not surprisingly, coworking spaces are often referred to as a "third space", the place for work between the office and the home; the other two places commonly associated with carrying out (tele)work.

Coworking spaces

Most coworking spaces are shared, open-plan workspaces that usually feature shared desks or tables where coworkers work alongside each other. These open work areas are not dissimilar to the activity-based work settings found in contemporary office environments of many large corporate buildings today. Yet at the same time, they mark a significant departure from the "cubicle" style office layouts that dominated in the 1980s and 1990s. Other features often included in coworking space offerings are:

- **Meeting spaces**
Open spaces or private rooms
- **Spaces for presentations and events**
Board rooms or larger open areas
- **Entertainment areas** Kitchens and cafés
- **Break-out and relaxation spaces**
- **Small numbers of private office suites**

Almost all coworking spaces feature some kind of reception area, be it a formal waiting lounge or, more typically, a desk where the host of the space will greet and check-in all people upon entry.

Joint activities

Coworking space operators often talk about 'activation' and 'curation' of the space and the community. This refers to the kinds of activities a coworking space offers to create a positive and engaging experience for members and guests. Such activities are thus both an important way for the operator to differentiate their space from other offerings in the market and an important reason why people sign up to become a member of a particular space. Activities come in many forms:

- **Regular member social events**
Coffee, lunch, social drinks
- **Facilitated networking**
Speed networking events
- **Individual professional introductions**
By email or face to face, usually by the host of the space
- **Learning events** Presentations by external guest speakers or by members of the coworking space
- **Tours of the space** For external interested parties and potential new members

Other activities that are common in coworking spaces are aimed at engaging and connecting members with broader audiences. These activities may also form part of the financial model for the space operations:

- **Hosting events for corporates**
For example, hackathons
- **Utilising space for external events**
Non-members and meetup groups
- **Events that engage students**
University or school groups

Most coworking spaces utilise web-based platforms and/or smartphone apps for managing events, room bookings and membership registration. Furthermore, in addition to common public social networking platforms like Facebook and LinkedIn to engage public audiences, many coworking spaces utilised closed enterprise social networking platforms, like Microsoft's Yammer or Slack, to provide a digital avenue for conversation, connection and sharing of resources between members and coworking space managers.

Membership models

Coworking spaces are usually run on a subscription membership base, which gives members access to all of the available work settings. Whilst each space will have slightly different membership models, members will typically pay a weekly or monthly fee, in line with their membership 'level', which is determined by a number of factors, that include:

Frequency Memberships are offered on a level according to specific needs of the member e.g. fulltime access, a number of days or hours a week, or casual access.

Dedicated space Permanent desk or office compared to shared spaces only.

Additional services After-hours access, specific technology requirements, mailing address, reception/phone services.

Access Membership to online community, event invitation, "community membership", affiliates.

Some operators place conditions on membership, such as a focus on certain industries, customers of the corporate workspace owner, or engage in a particular process of recruitment/interviewing in order to ensure a certain 'calibre' of professional members and to curate the community working in the space.

More than a serviced office: creating community

Most coworking spaces offer amenities similar to those offered by the established serviced office industry, such as access to closed individual work spaces, dedicated professional reception service, including telephone, mail, and email support, and other office support, such as printing, faxing and WiFi access. However, serviced offices focus on the individual business owner and their clients, and tend to be designed for the travelling senior corporate business person, and thus often resemble traditional corporate spaces, with corner offices and executive boardrooms. Access and membership

models may also be financially similar to serviced offices (e.g. monthly/weekly/casual pricing).

Material differences emerge when considering the professional and personal engagement that comes with working in a coworking space. Serviced offices are more likely to attract users who require certain facilities whilst travelling for business, and thus will have a more transient user base, making it harder to generate a sense of community with regular users. In fact, privacy is often what serviced offices feature in their value proposition.

The creation of community is the key difference between serviced offices and coworking spaces. Coworking spaces are typically built around a membership base of regular users. As such, they facilitate relationships between members through the open-plan layout of workspaces, the range of social, networking and learning events, and facilitated introductions between individual members by the staff. These activities provide a sense of identity as a member of a particular coworking community, which compares with the

rather transactional experience of a serviced-office, where people might know other users much in the same way as regular travellers meet each other in the same hotel or airport lounge.

Benefits for coworkers

91%
gain business insights from others

80%
achieve business growth

74%
experience greater productivity

70%
become physically healthier
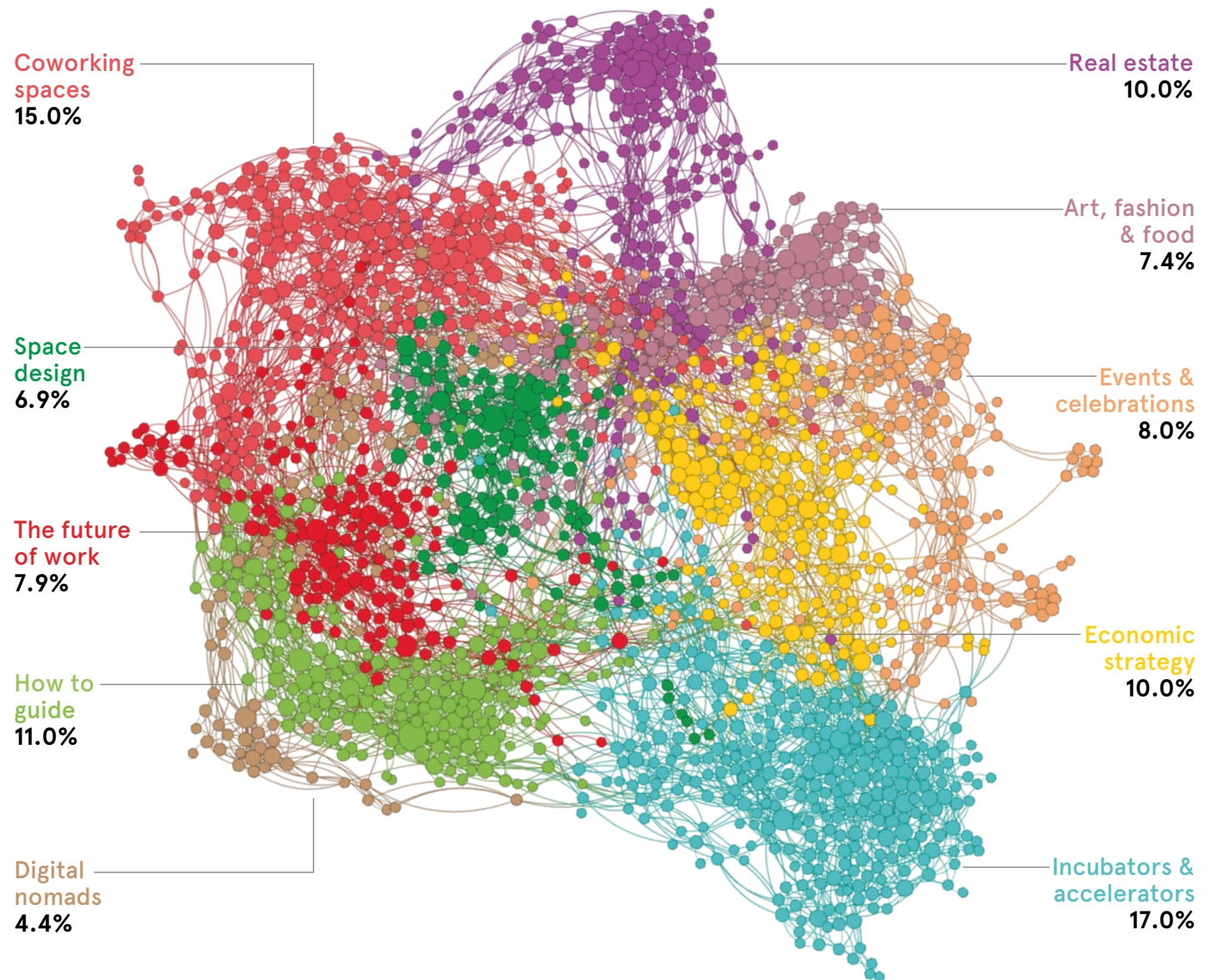
(SOURCE: DESKMAG 2015)

The global coworking conversation

We utilised the semantic text-analysis tool Quid (www.quid.com) to analyse and visualize the global online conversation surrounding "coworking".

The resulting network shows 10 clusters which represent different conversations that include coworking as a topic. The network is based on 1,839 articles from online news magazines and blogs, identified and visualized by the Quid tool.

Each article is represented as a node and connected to other nodes when it contains similar keywords and language; the larger a node, the more other nodes are connected to it.

Less distance between clusters indicates a high number of inter-related documents. Nodes and clusters at the centre are core to the overall network, indicating central topics and bridging ideas, while peripheral clusters are less central to the conversation, but might represent important niche topics.

Coworking spaces
15.0%

Real estate
10.0%

Art, fashion & food
7.4%

Space design
6.9%

Events & celebrations
8.0%

The future of work
7.9%

Economic strategy
10.0%

How to guide
11.0%

Digital nomads
4.4%

Incubators & accelerators
17.0%

10 clusters, 10 conversations

Incubators and accelerators

Coworking comes up often in articles about the startup scene, incubators and accelerator programs. The startup scene has embraced coworking as a way to organise and scale their operations, allowing them to add new talent quickly without having to enter into long-term real estate commitments. Not surprisingly, incubator and accelerator programs provide access to coworking facilities.

Coworking spaces

This cluster comprises articles about actual coworking spaces, often news or announcements of openings of new spaces. Another typical genre in this cluster contains articles with guides to or reviews of coworking spaces in particular regions. We would expect our report to also fall into this cluster. The cluster is closely connected to the 'Real estate' and 'Space design' clusters.

'How to' guides

Coworking is often mentioned as a new form of working in articles that provide ideas or advice to professionals or businesses about how to work more productively (e.g. '6 Ways to…', '5 Tips on how to…'). While many articles mention coworking as one among other aspects, some concentrate on the benefits of coworking specifically, for example as a way to stay productive while travelling. This cluster has strong links to "The future of work".

Real estate

This cluster covers real estate and financial aspects of the sector. On the one hand, it discusses real estate related decisions by coworking providers. On the other hand, coworking has become a prominent topic in the real estate sector itself, informing designs for clients who want to embrace new forms of working.

Economic strategy

This cluster is concerned with the economic development of cities or regions. Coworking spaces have become a vehicle for political decision-makers to attract entrepreneurs and cater for local start-up communities, with the aim to drive innovation, economic activity and growth. For example, articles report on public funding, grant agreements or announcements of new initiatives that include coworking aspects.

Events & celebrations

This peripheral cluster is somewhat of a mixed bag topic-wise. It includes articles on all kinds of events, such as summits, meetings, competitions, all of which mention coworking in some way. Upon closer inspection the cluster speaks to the fact that coworking spaces are often open to host events by third-parties or the general public.

The future of work

This is a core cluster that discusses coworking as a new way of working in conjunction with a wide range of different topics that centre around the future of work. Articles cover the work habits of millennials, work experience design, the importance of human dynamics and community building at work, the balancing of technological connectedness and personal touch, as well as management implications of new kinds of working.

Art, fashion & food

This cluster is evidence of the growing popularity of coworking within the arts and fashion communities. It further shows how the coworking scene and the creative and culinary scenes are intertwined, for example through the hosting of shows and exhibitions in coworking spaces.

Space design

This cluster covers the architectural aspects of coworking spaces. Articles in this cluster speak to the fact that many coworking spaces put a premium on clever architecture and visual designs. Another genre in this cluster reports more generally on the refurbishment and re-use of industrial structures, such as warehouses, many of which attract coworking facilities.

Digital nomads

This small cluster is strongly connected to "The future of work" and the "How to" clusters; it discusses the practices and life style of mobile workers, the so-called "digital nomads". For example, articles offer personal accounts of what it is like to work "on the go" and in changing environments. Coworking spaces are mentioned as one way in which this group of people works; not surprisingly, 'coffee shops' are also a frequently used keyword.

A global phenomenon

Since the opening of the first official coworking space in San Francisco in 2005, coworking spaces have become a global phenomenon.

Today, data obtained from a range of coworking directories suggests that coworking spaces can be found in at least 150 countries, spanning six continents.

Growth

The number of coworking spaces and their membership have experienced strong growth. As shown in Figure 2, the number of coworking spaces around the world has increased from 75 in 2007 to approximately 8,000 in 2015. It is predicted that by the end of 2017 there will be around 14,000 coworking spaces worldwide, with the number of individuals signed up to use them to exceed one million.[8]
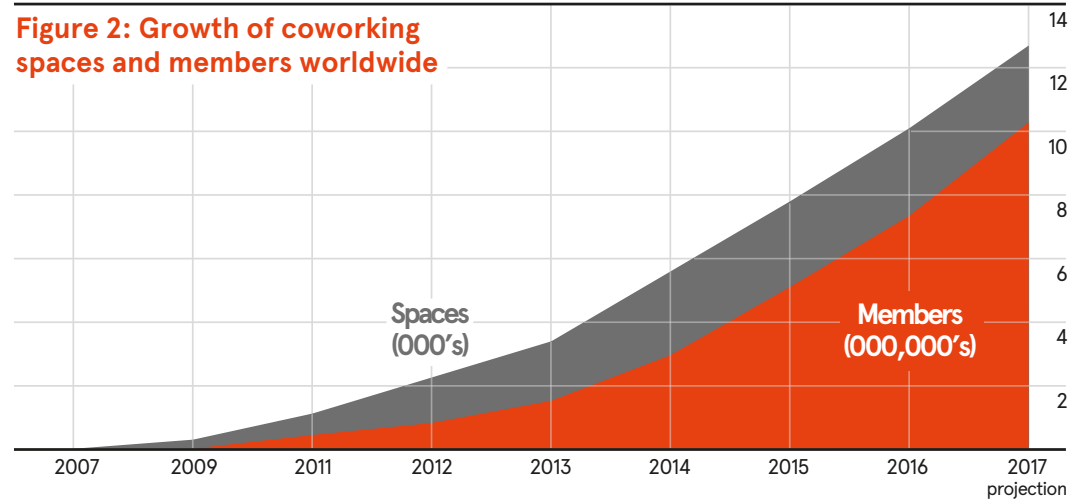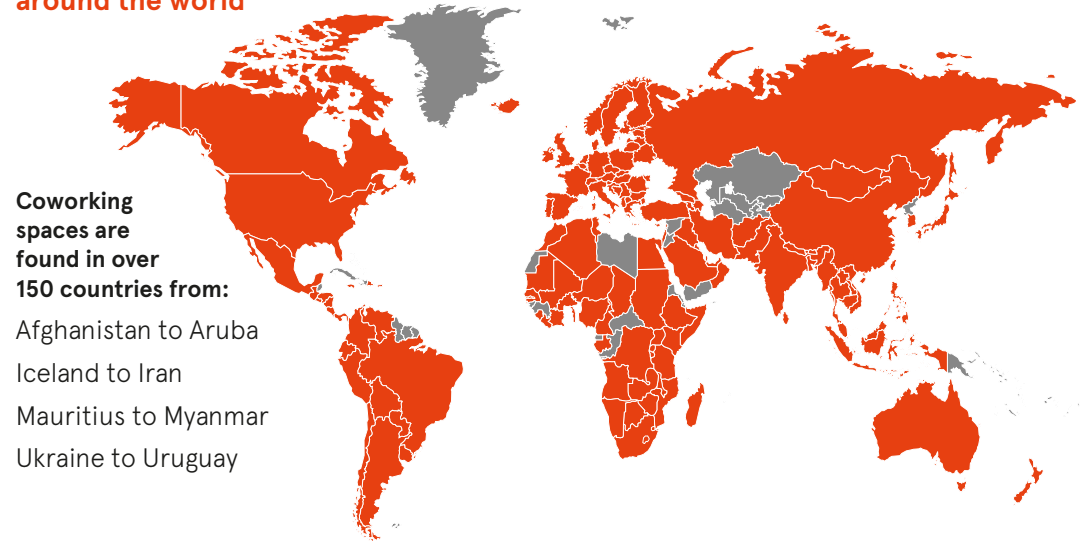
Figure 2: Growth of coworking spaces and members worldwide

Figure 3: Coworking around the world

Coworking spaces are found in over 150 countries from:

Afghanistan to Aruba

Iceland to Iran

Mauritius to Myanmar

Ukraine to Uruguay

Our research

Our study provides insight into the current state of the coworking industry in Australia. While existing research on Australian coworking has predominantly taken a real estate perspective, and focused quite narrowly on the space aspects of coworking. We provide a broader overview of coworking space locations, ownership and membership models.

The main contribution we make is a typology of different archetypes of coworking spaces, which illustrates the diversity of the industry and the various approaches that providers take to appeal to different target audiences.

To achieve this, we consulted a range of informal local and international coworking directories in order to firstly develop a comprehensive list of coworking spaces. As of March 2017, we identified just over 300 coworking spaces operational across Australia.

Note that for the purpose of this research, serviced offices were excluded from the list, even if the operator described it as a coworking space. Sub-leased offices or desk spaces offered by professional firms were also excluded, unless it was apparent that significant effort was made to create a membership offering with a distinct identity shared by members of the space.

We then gathered details on the location of each space, its ownership structure, target demographic, industry focus, and other qualitative data, such as website descriptions and social media information.

Finally, we used this data to iteratively generate a number of archetypes that reflect the diversity of coworking spaces that we encountered and allowed us to classify the vast majority of spaces on our list.

In the following, we first present descriptive results on the entire population of Australian coworking spaces, before we present in detail the resulting seven archetypes.

Image: **the aerie**, Sydney **theaerie.com.au**
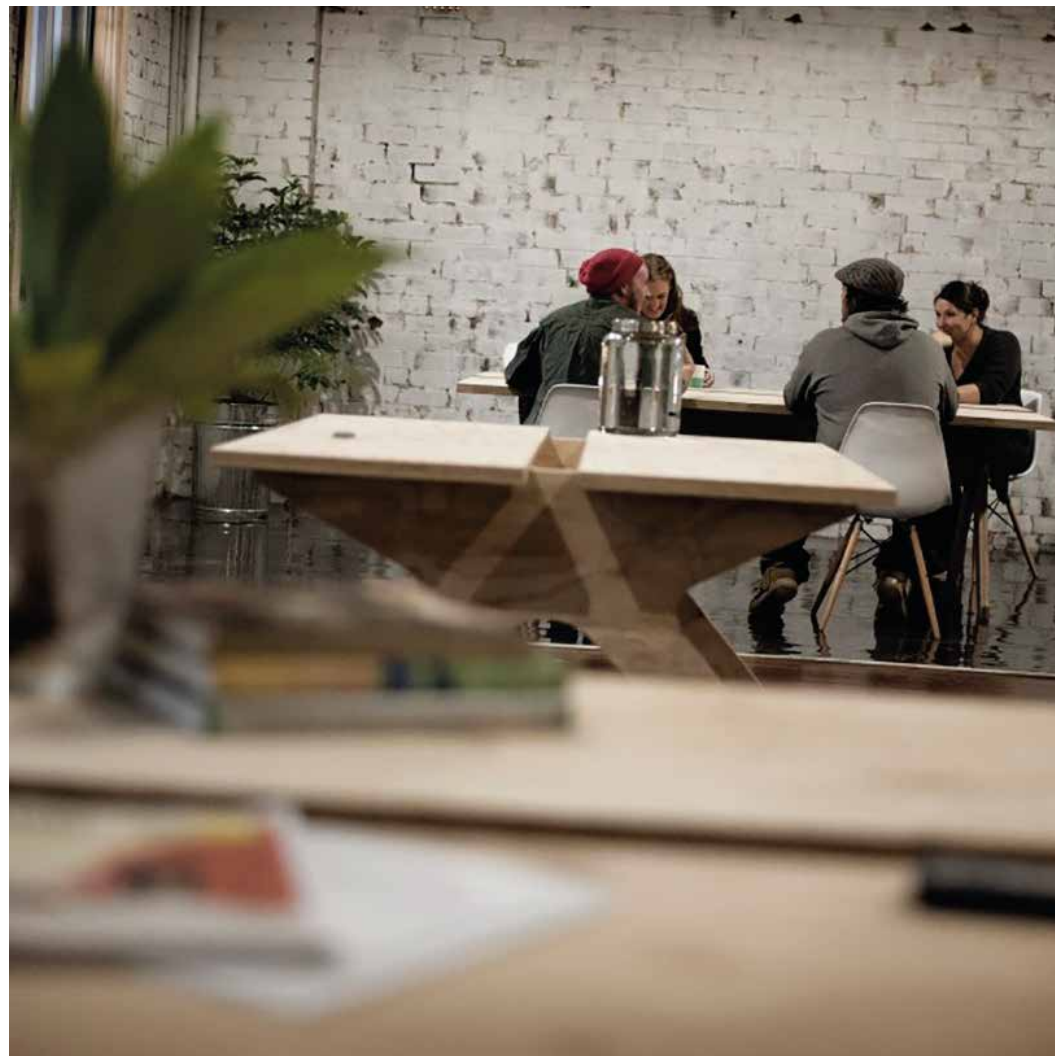
Where are coworking spaces located?

Figure 4 shows where Australian coworking spaces are located. It shows that 53% of coworking spaces are located in CBD or inner metro areas. Given that most coworking spaces target workers who tend to be in professional services and technical/knowledge based work, it is no surprise that the majority of coworking spaces are located in or close to the centre of major Australian cities.

Importantly though, and somewhat surprisingly, our data shows that coworking is not just an inner-city phenomenon, with 35% of spaces located away from the economic hubs of capital cities.

Interestingly, only 7% of coworking spaces are found in outer suburban areas, which is usually where more affordable housing is found in cities. This suggests that there is either less demand for coworking services on the outskirts of cities because the target group is more likely to live in more concentrated urban areas, or that coworkers living in outer suburban areas are willing to commute and thus to combine inner-city working with suburban living.

We further found that the 15% of coworking spaces located in regional areas tended to be relatively young, compared to the more established coworking spaces in the cities. Anecdotal evidence suggests that these spaces have been established to support the development of local employment opportunities and are thus vehicles of economic development, galvanising business communities in regional areas, but often inspired by city-based models in terms of form and function.

Figure 4: Australian coworking spaces by location type.

24% CBD

29% Inner-metro

13% Inner-suburban

12% Suburban
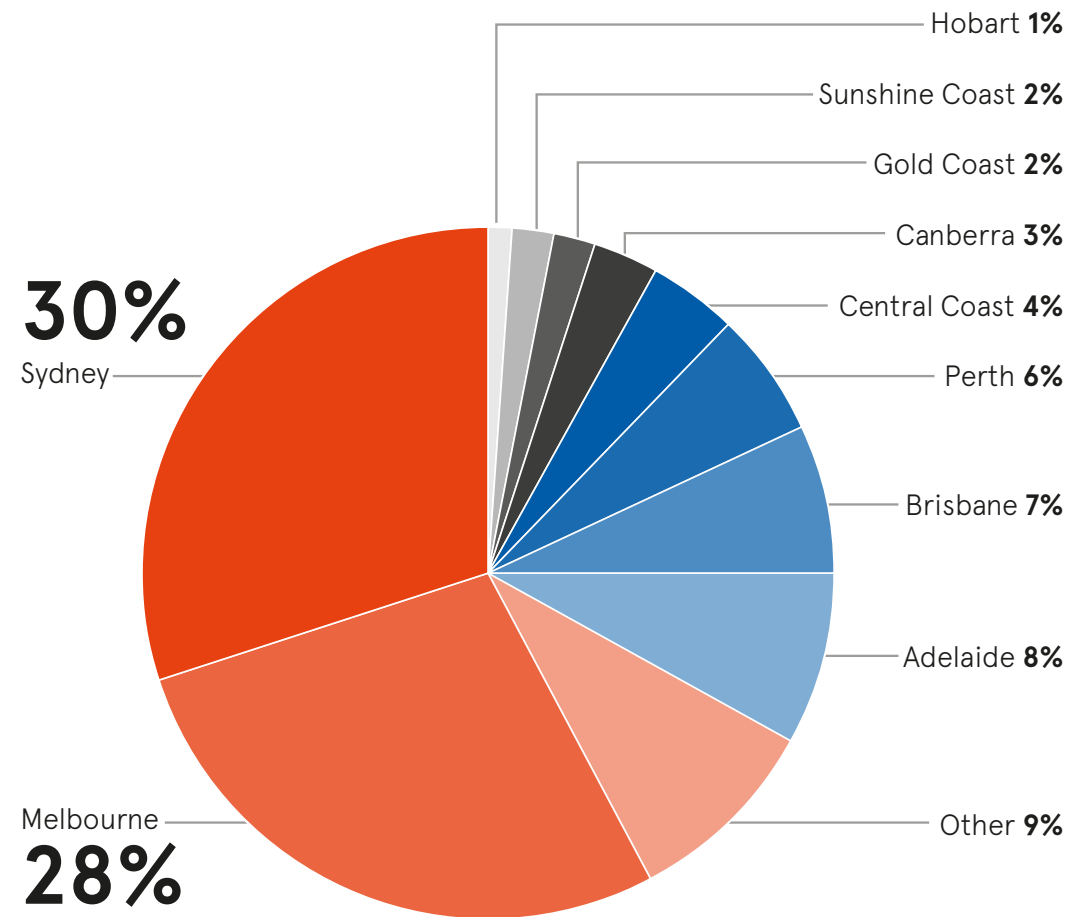
7% Outer-suburban

15% Regional
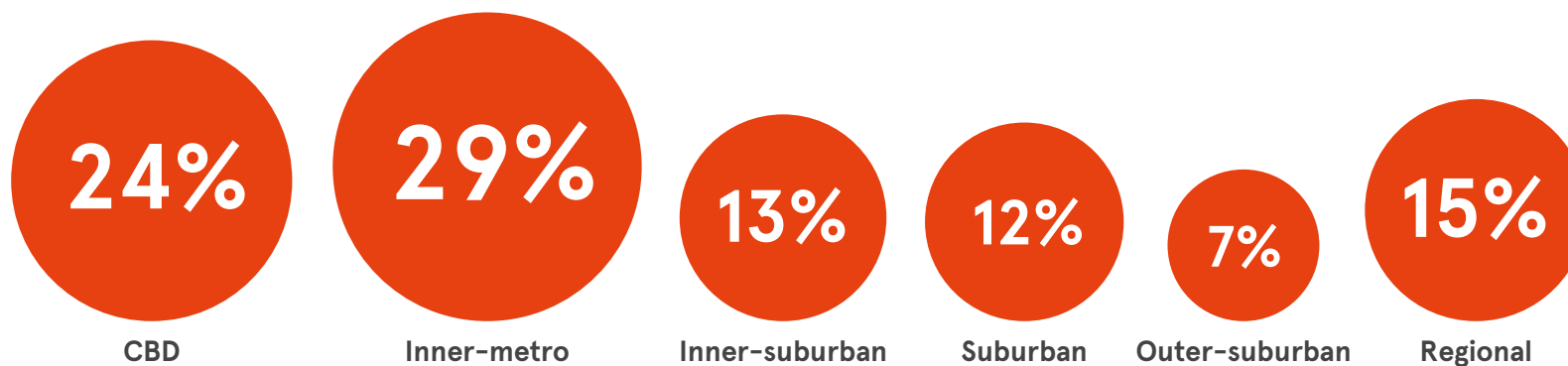
A further breakdown of location data by city (Figure 5) shows that our two biggest cities, Sydney and Melbourne, are home to over half of coworking spaces (58%). While the earliest coworking spaces were established here, coworking is also likely to appeal to the high numbers of skilled immigrants and visitors in those two international hubs. The other Australian capital cities take their share of the industry roughly in proportion to their size. A surprising finding is the relatively high number of coworking spaces found in regional centres along the east coast of Australia, such as at the Gold Coast and Sunshine Coast in Queensland, and the Central Coast in New South Wales, as well as other popular seaside locations such as Byron Bay and the South Coast of NSW. This suggests that coworking spaces are geared towards supporting certain lifestyle choices by professionals who want a 'seachange' that combines relaxed 'beach life' with working in a community of like-minded individuals.

Figure 5: Australian coworking spaces by location.

Hobart **1%**
Sunshine Coast **2%**
Gold Coast **2%**
Canberra **3%**
Central Coast **4%**
Perth **6%**
Brisbane **7%**
Adelaide **8%**
Other **9%**

Sydney **30%**
Melbourne **28%**

Providers and target audiences of coworking spaces

Ownership

Coworking spaces come in different shapes and flavours. One major distinction lies in the different ownership and provider models.

Our data (Figure 6) shows that 75% of coworking spaces in Australia are owned and run as private businesses. The majority of these (54%) are run as separate profit-driven entities under private ownership. Another 21% run their coworking space as ancillary to their regular business activities, rather than as the main business.

Anecdotal evidence suggests that many of these coworking operators establish coworking spaces in order to help with covering the costs associated with renting office space, or otherwise as a way to complement their existing professional services and enhance their appeal to existing and future clients.

Not-for-profit coworking spaces account for 8% of the total number of spaces. They are typically established in order to either pursue a specific social justice cause valued by the parent organisation, e.g. reducing youth unemployment, or to more generally support social enterprise development. Some of the most well-established coworking spaces in Australia are set up as non-profit organisations.

Government funded coworking spaces (6%) are found across state and local government levels, and are frequently utilised by local government authorities as a way to further economic development in their region.
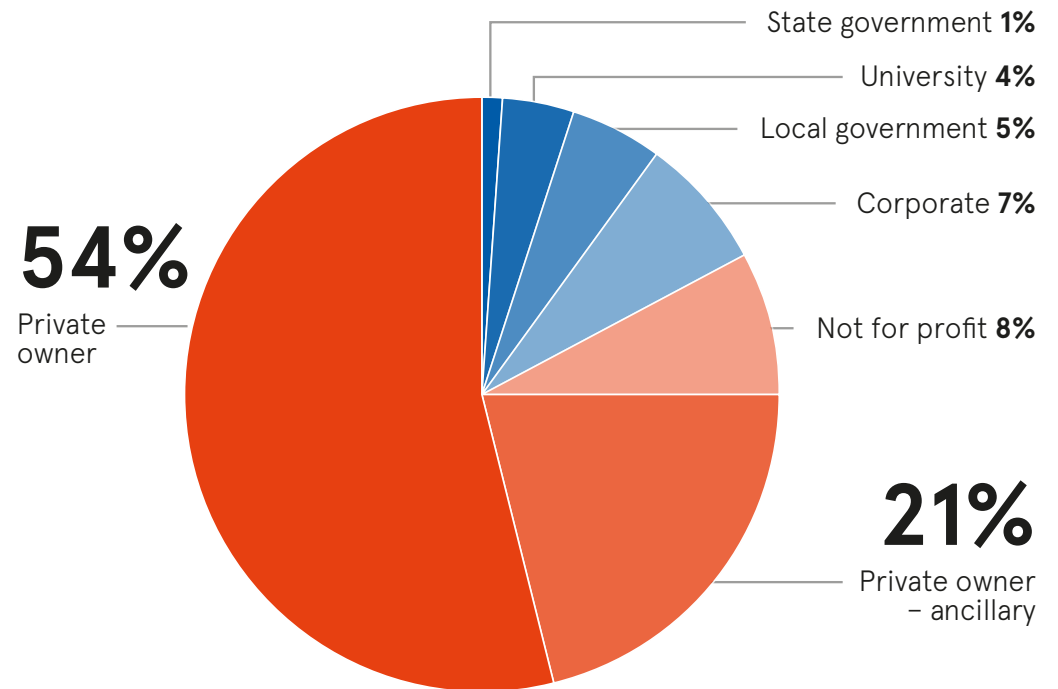
A number of corporate ownership models (7%) have only recently emerged, and appear to be primarily a way for larger institutions to engage with their customers – to provide a positive customer experience and support them in their own business growth.

Coworking spaces operated by universities (4%) are the latest addition to the industry, providing alternative career choices for students, and an avenue to engage more meaningfully with industry. These are usually co-located with business incubators and accelerators, giving students a more structured development experience, as well as access to mentoring, seed capital, and the fostering of lasting research partnerships.

Figure 6: Ownership models of coworking spaces in Australia

State government **1%**
University **4%**
Local government **5%**
Corporate **7%**
Not for profit **8%**
54% Private owner
21% Private owner – ancillary

Target audience

While ownership structures are relatively straight-forward to establish, e.g. via information on the space's website, determining which audience a particular coworking space targets is not as easy. Hence, we used a variety of sources including website descriptions, social media, and information on the kinds of events and activities that a space advertises, to deduce the particular focus of each coworking space regarding likely target audiences.

This data fed into the identification of archetypes, but also, taken together in a word cloud, provides an interesting reflection of the collective orientation of the Australian coworking industry. As shown in Figure 7, there is a particularly strong focus on supporting creative industries and individuals who identify as 'creative'. This appeared to refer to either the industries that coworking spaces typically aim to attract (i.e digital, arts, fashion, marketing etc.), or the mindset and culture of the community they are fostering (i.e innovative and disruptive).

Figure 7: The focus of coworking spaces in Australia

Figure 8: Names used in Australian coworking spaces

As expected, most coworking spaces target small businesses, start-ups, freelancers, and entrepreneurs in their core messaging.

What's in a name?

The names of coworking spaces often reflect the founder's intentions for the purpose of the coworking community. In Australia, several key words are used by a

number of operators, such as "Hub", "Centre", "Village", and "Nest", all of which suggest that coworking is a place where people come together, invoking a sense of community and belonging. Other commonly included words are "Lab" and "Studio", suggesting a place for experimenting and creating.

Many of the coworking space names also reflect the history of the buildings that they reside in. Examples are the York

Butter Factory in Melbourne, The Typewriter Factory in Hobart, The Firestation in Ipswich, or The Exchange on the Gold Coast. This naming practice reflects the intention of coworking spaces to seek a connection with the local community. Globally, this is quite a common phenomenon, in particular given that many coworking spaces world-wide operate in historic buildings, repurposing them for a new way of working.
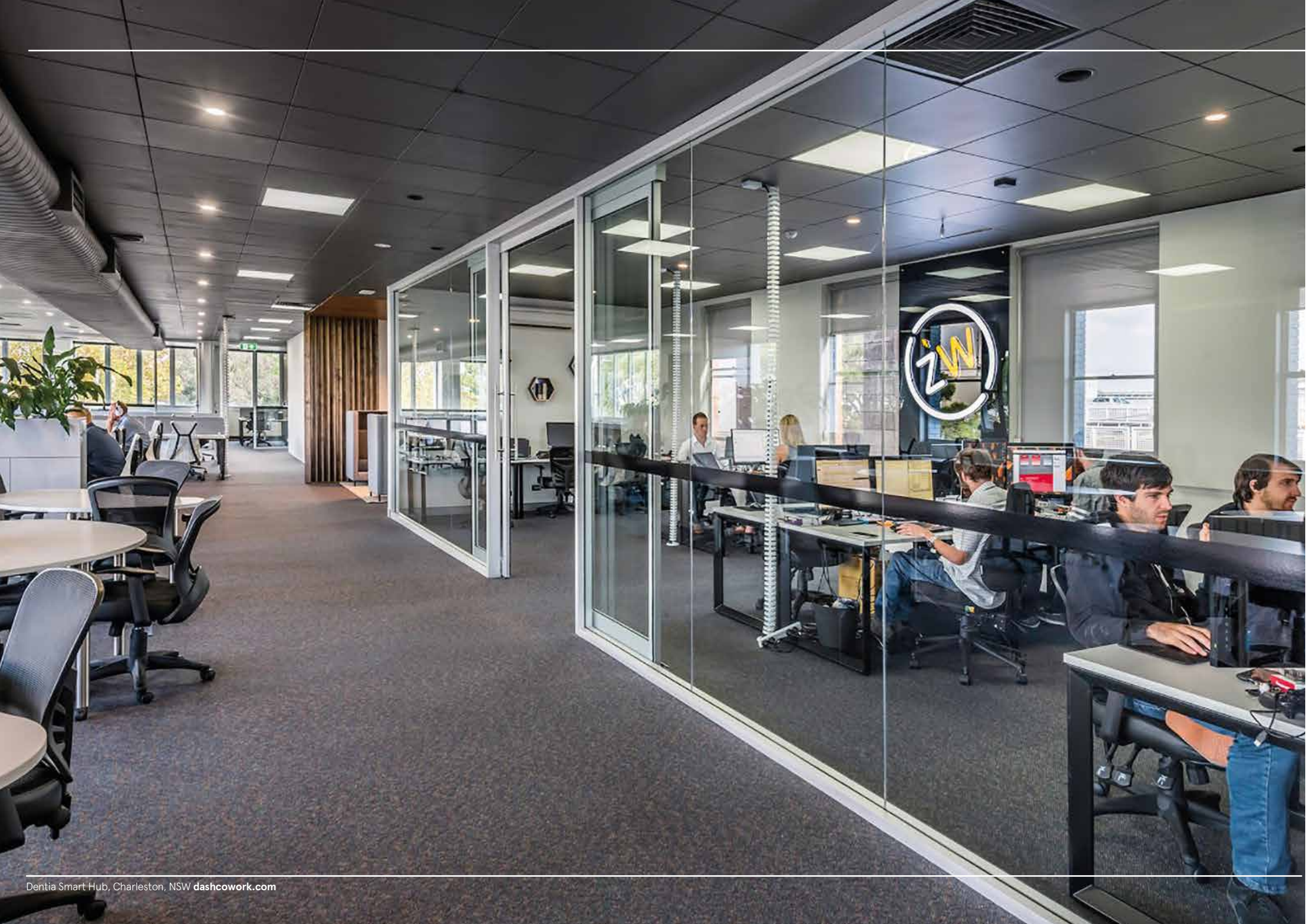
Archetypes of coworking spaces

In order to provide an accessible overview of the variety and range of different coworking spaces in Australia, we classified the coworking spaces on our list according to a number of key dimensions, which iteratively resulted in a set of seven distinct coworking space archetypes.

The resulting seven coworking archetypes allowed us to unambiguously classify approximately 75% of all coworking spaces on our list. The remaining 25% are either a combination of two or more of the archetypes, or in some cases they represent a unique specialist coworking space (targeting a particular industry or market

segment). For a number of spaces on our list it was simply too difficult to discern the necessary data to cover all of the above classification criteria.

To provide an initial overview of the seven archetypes, we provide a classification according to two distinct dimensions: 1) nature of work (independent vs collective) and 2) approach to innovation

(emergent/creative vs established/corporate). The resulting overview is shown in Figure 9; the size of the bubble indicates the number of spaces that were classified to fall under each archetype. We provide detailed profiles of each archetype on the following pages.

Dimensions utilised for the classification of the seven archetypes

1 **Location** CBD, metropolitan, suburban, regional

2 **Space concept** Traditional office layouts, ABW, open plan

3 **Coworking focus** Space, business development, community, events

4 **Ownership** For-profit, member-based, corporate, government

5 **Industry focus** Start-up, tech, social impact, creative industries

6 **Member type** Small business, non-profit

7 **Openness to new members** Open, restricted, or by application only

Figure 9: Australian coworking spaces by archetype. Size of the circle indicates the number of spaces relative to all classified types across Australia.
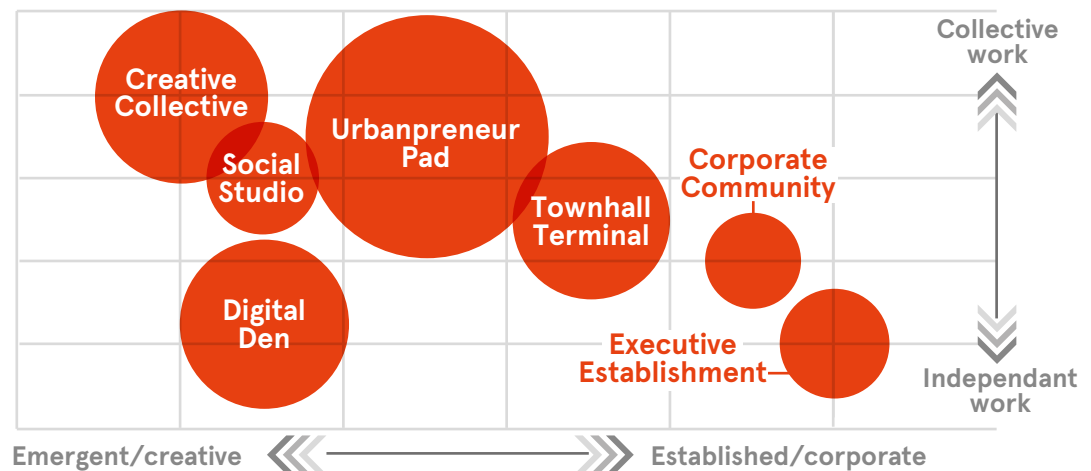
Archetype 1: Urbanpreneurial Pad

Welcome to the place where you will realise your personal work potential!

From the very moment you step through the sliding doors of the Urbanpreneurial Pad, you know that you have left the polished, corporate world of work behind you.

Edgy bright colours mix with funky furniture, swing sets are hanging from the ceiling and inspirational quotes litter the walls. Cool music plays throughout the space. You have entered the world of the young and savvy, city-based entrepreneur.

The host welcomes you and lets you know that there is a lunch-and-learn event about to kick off and "everyone is coming", because the talk is featuring a widely known international guest. While you wait, you slouch on a beanbag and sip on your complementary coconut water, while browsing through a book from the communal library that features a range of the latest business and personal growth literature.

At a desk nearby, someone is just finishing Skype session with an international collaborator, another person is engaged in a lively conversation in one of the phone call booths in the corner of the space. You notice a positive, welcoming vibe throughout the space, and whilst many people appear focused on their work, passers-by smile at you and engage in small talk to make you feel right at home.
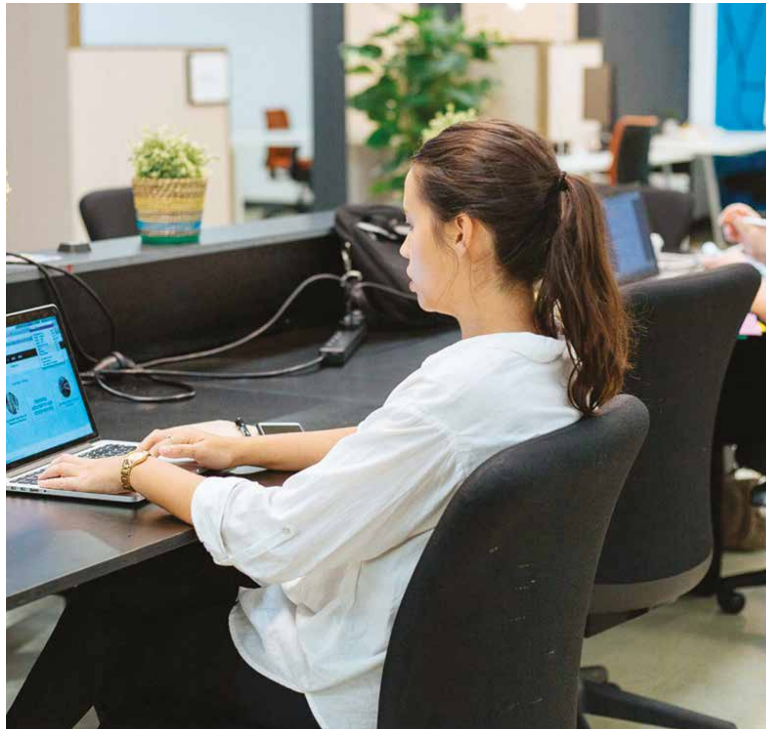
Archetype tagline?

"Reach for the stars"

Where to find us?
Inner metro, CBD fringe

Who runs it?
Non-profit or privately owned

Who works here?
Entrepreneurs, knowledge workers, small business, "Corporate refugees"

Business model?
Membership

What do we do here?
Professional development, networking, learning

Who greets you here?
Professional hosts

What are we wearing here?
T-shirts, jeans, smart casual.

Look and feel?
Anti-corporate, funky, swing sets, hammocks, beanbags, exotic plants

Why are we here?
To grow our businesses

Friday fun?
Motivational speaker, TED Talk

Image: depo8, Melbourne **depo8.com**

Case study: depo8, Melbourne

Depo8 coworking space is housed in a large converted warehouse in the inner-Melbourne suburb of Prahran. At the time of writing it counts about 50 permanent members who occupy desks across two levels of the building, featuring a range of casual breakout areas, quiet rooms and boardrooms. Access to depo8 is available 24/7 with the permanent membership, and includes WiFi, all outgoings, coffee, tea, and access to all meeting rooms, quiet areas, and a shared kitchen.

The décor of the space is open and clean. It features a large art mural on the wall donated by one of the resident members to inject colour into the space.

Depo8 have a focus on supporting small businesses in their early stages of development. They also attract interstate and international companies that are starting to build their presence in Melbourne or Australia.

An important part of the depo8 experience for member and guests is the social aspect of the community. depo8 team regularly facilitates opportunities for members to get to know each other, such as shared coffee, lunch and drinks at local restaurants and pubs.

Depo8 also has over 300 casual members who work from the space occasionally, attend events and participate in social events. They have a developed an app called Nesk to enable flexibility by allowing members to check in for an hour or a full day. The choice is theirs.

"Our aim is to help businesses in their early stages, whether you're a freelancer, start-up, or a company setting up a new office." **Erz from depo8.com**

Image: depo8, Melbourne **depo8.com**

Archetype 2: Digital Den

Down a small CBD alley and into a heritage listed building, you enter the Digital Den located in the downstairs basement.

Having entered your email to the visitor registry, two things are immediately noticeable: a sea of screens and the sound of typing. This is the place where the next technology "unicorn" start-up is being conceived.

At rows of desks in the open plan space, in front of two or sometimes three screens each, sit bright and ambitious millennials - coders, hackers and developers who work hard to become the next Google, AirBnb or Uber. Working with determination, the ubiquitous noise-cancelling headphones make it clear that you shouldn't interrupt them.

On the other side of the space, one group huddles around a whiteboard updating each other on the latest program release they are working on, while another discusses a PowerPoint projection in a small glass-walled room; the 'deck' for the next early-round angel-investor meeting.

The ambience of the space is reminiscent of most new city cafes: exposed brick, filament globes, dark and hidden corners.

Despite all the activity, it is a relaxed environment with fun spaces to relax and play, with two young men having a break over a game of table tennis. The space hosts regular events to learn from and be inspired by tech industry veterans who have 'made it' already.

Archetype tagline?

"Get shit done"

Where to find us?
Inner metro, CBD

Who runs it?
Venture capitalists/investors or non-profit

Who works here?
Coders, developers, hackers, IT crowd, millennials, noticeably male dominated

Business model?
Take percentage equity in new businesses

What do we do here?
Hackathons, 24/7 access, screen time, coding

Who greets you here?
Check-in app

What are we wearing here?
T-shirt, shorts, headphones.

Look and feel?
Foosball table, takeout menu collection, rows of desks, agile whiteboards

Why are we here?
To create the next digital unicorn and move to Silicon Valley

Friday fun?
Beers at 5pm

Case study: SouthStart Cowork

SouthStart (formerly Majoran Distillery) is a space aimed primarily at tech start-ups, located at Grenfell Street in Adelaide's CBD in the heritage-listed Tattersalls Club.

SouthStart runs as a non-profit and hosts a range of events for anyone interested in technology; from coder meetup groups to networking events with successful interstate and international tech start-up founders. The passion of the operators in supporting the tech industry growth for the Adelaide community is evident.

Recently, SouthStart has become aligned with Adelaide's annual tech startup conference and a formal accelerator program, which now also operates from the space.

Activity at SouthStart centres around one large open plan space with rows of desks for permanent members, and some shared desks for less regular members. Members also have access to smaller meeting and project spaces.

SouthStart is also supported through financial sponsorship from NewsCorp, who see their partnership as a way to help bring innovation into their own corporate team, which is located nearby.

"Adelaide's coworking space for the technology start-up community."

southstart.co/cowork

Image: SouthStart Cowork, Adelaide **southstart.co/cowork**

Archetype 3: Corporate Community

Walking through the rotating glass doors of the inner-city high-rise to the reception of the corporate head office, you duck to the side to enter what appears to be something akin to a frequent flyer lounge.

Fresh, modern décor which reflects the espoused values of the host organisation. You sense that this is an innovative service offering.

A professional member of staff, the facilitator, greets you and tells you about what the space is all about, and why this initiative exists: to build deeper relationships with the company's customers and help them grow.

There is a diversity of people in the space, working, meeting their own clients and networking with each other.

The space facilitator lets you know about the upcoming talk from one of the corporate's expert from the environmental sustainability department.

After a quick tour of the space, you grab a coffee from the free service provided and settle in to the comfortable surroundings.

Archetype tagline?

"Connect, Network, Learn"

Where to find us?
CBD, in a high-rise building

Who runs it?
Corporate

Who works here?
Small business, company clients, employee volunteers

Business model?
Free for customers of sponsoring corporate

What do we do here?
Business development, showcasing ideas

Who greets you here?
Facilitator

What are we wearing here?
Corporate, semi-formal

Look and feel?
Café, corporate premise re-fit out, branded, modern corporate look, ABW testbed

Why are we here?
Networking, meeting clients, to be seen

Friday fun?
Wine tasting and networking

Image: The Village at NAB, Melbourne nab.com.au/thevillage Photo credit: Kate Hanley

Case study: The Village, Melbourne

The Village is located in one of the corporate buildings of National Australia Bank in the Docklands, Melbourne. In the building, The Village forms part of the entry level alongside a café, bank branch and auditorium. The Village offers open drop-in workspaces and a range of semi-closed meeting rooms.

The Village is part of the bank's strategy to build deeper relationships with their customers, and is offered as a value-add, in particular for small businesses. Access to The Village is free for the business customers of the bank, who include small business owners, non-for-profits, corporate and institutional banking clients. With over 2,500 members representing more than 2,000 different businesses and organisations, The Village is recognised as the largest coworking community in Australia.

"Supporting our business and community customers by providing a space for them to connect with their clients, be part of a community, and learn from leaders." **nab.com.au/thevillage**

Image: The Village at NAB, Melbourne **nab.com.au/thevillage**

Archetype 4: Townhall Terminal

You are in a typical regional town. You find what you were looking for in what used to be the old community hall. The somewhat unassuming and ageing outside hides a surprise inside in the form of an open plan workspace with dedicated meeting spaces and a tidy communal kitchen with a large table. You are greeted by one of the members who is on 'receptionist' duty for the day. She welcomes you to the Townhall Terminal – the local community coworking space.

The space might not be as 'pretty' as some of the inner-city spaces you have already visited, both in terms of layout and furniture, but the locals are fiercely proud of what this space stands for: taking the local economy into their own hands and not waiting for government or corporates to lead the way (although they remain always open to any support!)

Town halls have always been places where locals met to discuss what was important in the community. For many smaller towns and regions, these coworking spaces are places where interested locals go to take action around the future of their community. They take many forms; a small shopfront, an old community hall, or an unused learning centre.

Archetype tagline?

"Grow your business locally, work where you live"

Where to find us?
Country towns, outer suburbia – in refitted council-owned buildings

Who runs it?
Local government or community action group initiative

Who works here?
Affordable space for small businesses, local freelancers

Business model?
Non-profit/philanthropic business support

What do we do here?
Using meeting spaces, business development workshops

Who greets you here?
Shared admin, receptionist or "member on duty"

What are we wearing here?
Casual

Look and feel?
Community centre, pre-used office furniture

Why are we here?
Support local business and support the community

Friday fun?
"How-to classes" for business owners

Case study: CoWS Near The Coast

Above the shops of the main street of Bega, at the South Coast in NSW, a coworking space is run by a local software engineering company. CoWS extends across three rooms with ample desks and chairs, in a relatively simple and functional set up, reflecting the true grass roots nature of this initiative.

Aside from a small group of locals who work regularly from here, the CoWS team host a range of regular events, such as coding nights, hosting local and visiting speakers, skilled sea-changer intro events, minecraft camps, synthesiser building and fun, social events celebrating mathematical symbols like Pi(π) day, featuring a pie on 14th March (3.14...).

These events are all focused on continuing to build the local capability and focus on STEM jobs and IT.

In 2016, CoWS hosted a week of innovation events, including a hackathon and start-up camp that brought professionals from Sydney, Canberra and Wollongong to the region. They have also recently opened a creative suite to support local interest beyond technology and attract more talent to the area.

"CoWS Near The Coast is the home of tech and startups in the Bega Valley, supporting the aspirational outlook of many people in the region." cowsnearthecoast.com.au

Image: CoWS Near The Coast, Bega, NSW. cowsnearthecoast.com.au

Archetype 5: Executive Establishment

Located on Level 34 of the inner-city high-rise, conveniently accessible with the high-speed lift, you find yourself in the spacious reception area of the Executive Establishment. You are greeted by the concierge who takes your photo and issues your visitor pass for the day.

Welcome to the modern workplace of the high-end professional. The Executive Establishment could not be further from the classic coworking spaces where young entrepreneurs and start-ups come to work and play. Oozing quality and considered finishes, you'll find the sleek glass lines and marble tops you might expect from top-end agencies, business lounges and new corporate offices.

A waiter offers espresso coffee and organic teas, as you are invited to relax on the designer furniture to await your meeting.

Looking around, the members seem focused and professional, respecting each other's quiet enjoyment of the space. You can't help but be impressed by the exclusivity of this workplace, and its enviable location right in the centre of the CBD, enjoying one of the best views the city has to offer.

Archetype tagline?

"Working in style. No compromise."

Where to find us?
CBD

Who runs it?
Privately owned

Who works here?
Professionals with corporate clients, who want to impress

Business model?
Premium membership, by application only

What do we do here?
Meeting clients, corporate presentations

Who greets you here?
Concierge

What are we wearing here?
Professional corporate attire

Look and feel?
Premium fit-out, designer furniture, lounges, water/city views

Why are we here?
To work in an exclusive, professional space

Friday fun?
Nothing, everyone's on the way to the airport

Image: Gravity, Brisbane **gravitycoworking.com.au**

Case study: Gravity

With a focus on established professionals and small business operators, you might consider Gravity as a cross between a coworking space and a business club.

Gravity members have access to three high-grade office tower environments in CBD locations of Brisbane, Melbourne, and Sydney; each offering expansive views cutting through the city skyline. Polished concrete or wooden floors, designer kitchens, and high quality, minimalist finishes are features in each space.

Membership comes with all the mods and cons that you would expect from the modern corporate office, including end of trip facilities such as showers and bike storage.

With a range of events designed for business owners looking to grow their national footprint, or impress their clients, you'll expect a more up-market approach to networking or professional development at a Gravity event.

"Gravity is a boutique members' workspace attracting a network of business leaders, industry experts, innovators and entrepreneurs."

gravitycoworking.com.au

Image: Gravity, Brisbane **gravitycoworking.com.au**

Archetype 6: Social Studio

You find the red door you were told to use in an otherwise non-descript building just off the main street of this inner-city suburb. You enter and find yourself in a space that, while smaller than many other coworking space, is unmistakably a shared work space.

Unassuming in nature, the Social Studio appears both quirky and welcoming at the same time, a light-filled room opening to a court yard, set up with second-hand furniture and sustainably sourced or recycled goods, in line with the values of the participants here. The communal desks and tables used here easily move or can be repurposed for evening community events.

Missing the formalities of many other coworking spaces, if you're looking lost, you may be approached by the day's volunteer, or just make yourself at home! Everyone is welcome here, and most coworkers will just assume that you're there to help anyway. Pick a cause, offer what you can do, and you'll fit right in, because the Social Studio is the place that fosters passion and purpose. The home of social enterprises who combine business know-how with community impact, the Social Studio is the hub of social innovation with a clear focus on the greater good, aiming to prove that business and social impact are not opposites but two sides of the same coin.

Archetype tagline?

"Do good, change the world, find yourself"

Where to find us?
Inner metro, inner suburbs

Who runs it?
Not-for-profit or socially minded small business

Who works here?
Not-for-profits, social enterprises, values driven individuals

Business model?
Volunteering, nominal membership fee

What do we do here?
Personal and business development

Who greets you here?
Part-time volunteer or member helping out

What are we wearing here?
T-shirts, jeans, smart casual

Look and feel?
Budget furniture, recycled, second hand but not random, inspiring quotes featured on the wall

Why are we here?
To make a difference

Friday fun?
Busy saving the world

Case study: The Common Room

Located within a local community centre complex, The Common Room is hosted by Vibewire, a youth-led not-for-profit in Sydney which aims to support young people in building their own businesses, open only to twenty-something aspiring entrepreneurs.

As an "entry level" coworking space, The Common Room has none of the shine of many full-fee paying spaces. Instead, it prides itself on being affordable and accessible, offering a large, open and "down to earth" space with plenty of natural light and all the basics facilities expected in a coworking space. The Common Room is all about purpose; helping young people to find theirs, to build confidence and to create something for themselves and for others.

The Common Room regularly hosts workshops and evening classes and business hackathons.

"We're the launch pad for young change makers" vibewire.org

Image: The Common Room @ Vibewire **vibewire.org** Photo credit: Fox Mckenzie

Archetype 7: Creative Collective

The flyer points down the side of this warehouse, where a small sign reads "Open". Pushing past the warehouse door, you enter the curious world of the artist and creative. Polished concrete floors, trestles holding up wooden tables with various sculptures, paintings and other knick-knacks hold hidden stories of their creators.

Music wafts through the space from one of the small studios coming off a central courtyard, as you are greeted by the resident dog who comes up to check you out. Catching a glimpse of the various creative endeavours around, you see a photographic studio, a graphic designer amidst sheets of sketches, and the cutting room of a fashion designer.

The other side of the flyer promotes an exhibition launch later that week; an emerging local artist will host a display of their recent work. You get the sense that the community here serves as an important support to the artists who reside there, and at the same time as an avenue for them to engage with a wider audience.

Archetype tagline?

"Express yourself, be supported"

Where to find us?
Inner metro

Who runs it?
Artist cooperative/collective, small business owner

Who works here?
Artists, creative types, designers

Business model?
Collective, not-for-profit, arts grants

What do we do here?
Being creative, showcasing art, inspiring each other

Who greets you here?
Artist in residence, or the community pet

What are we wearing here?
Casual, art workshop wear

Look and feel?
Warehouse, temporary walls, second hand couches

Why are we here?
To inspire each other

Friday fun?
Exhibitions inviting the community in

Image: **the aerie**, Sydney **theaerie.com.au**

Case study: the aerie

Located above an old brick factory beneath tall, exposed roof beams, **the aerie** is a creative coworking warehouse space in the heart of Sydney's inner west. It is run as a sister space to Tortuga Studios, upon which it perches, an eclectic artist-run collaborative warehouse space that has been in existence for almost ten years.

the aerie's members are predominantly locally-based creatives and include writers, photographers, filmmakers, designers, small business owners and start-ups. The space offers a large open-plan work area, a range of light-filled studio spaces, common rooms, an 11m hot desk, fast WiFi and a photographic studio. Of formative importance at **the aerie** is affordability, and a vibrant collaborative space that is open to all is integral to its ethos. Its purpose is to work with its sister space to create an arts and creative hub in the heart of the community that engenders both connectivity and community within the arts scene.

*"**the aerie** is born to channel rampant creativity, inspiration seeping from every rusted pipe and peeling truss, from leafy inner-city views and the pulsing arts scene of St.Peters"* **theaerie.com.au**

Image: the aerie, Sydney **theaerie.com.au**

Personal stories

Connections are the key to thriving in small business

Which is why Andrea joined a coworking space. As a small business owner, Andrea thrives on meeting new like-minded people who want to grow and develop their business and themselves.

"It's about getting out from just working at home within my own four walls, meeting a whole lot of interesting people, and the opportunity to grow your business through relationships. You never know where those opportunities will take you!"

Andrea says that relationships in her coworking space are more sophisticated than she expected, and are a great way to grow awareness of her business. Andrea is a strong advocate for coworking in her networks and has introduced a number of people to her space who have signed up as members. She sees the opportunity in

her coworking space to help her grow her business.

"The facilities provide members with the opportunity to develop and connect with other businesses. With growing membership, there will be even more members to connect with, greater opportunities for collaboration, and at the end of the day, creating a stronger and healthier SME [small and medium enterprise] market"

The cost of access to office and coworking spaces can be quite prohibitive for small business owners, particularly in the city. Whilst there are many other good reasons for being a part of the [coworking] community, even if you just need a place to work, meet clients and book rooms, becoming a member was a smart financial decision, according to Andrea.

Luckily, not all coworking spaces are alike

Scott, a manager of a small technology training company, joined his coworking community after visiting and trialling a range of local coworking spaces.

"I was looking for somewhere that made me feel inspired to go in and get involved with the community," Scott said about his approach to deciding on his current space.

One that he visited he described as *"a very intense environment, too techy; I just don't need a whole lot of young techies floating around. I'm less interested in that, and interested in meeting people who are actually running their own businesses."*

Previously working mainly from home or a local café, Scott mentioned that

for him, coworking was much more than just an office to do work from, but also a platform to engage with other members, attend events, and test the range of services that he is developing for corporate and government clients.

Scott mentioned that the host of the coworking space also provides an important role in facilitating the environment and helping to make meaningful connections between members.

"This place is about people and face to face. There is a core group of members here that feel like a family, which has become really important to me. It creates a real atmosphere of belonging."

Your way forward

The proliferation and growth of coworking spaces, in Australia and worldwide, are evidence that the way we work is changing. The impact of technology, the allure and ease of self-employment, inspiring new work settings, and the desire for creativity, self-expression and purposeful work drive, and at the same time are being driven, by this phenomenon. The variety of coworking spaces in Australia presents new opportunities for individuals and organisations to engage, learn and collaborate with interesting businesses and creative professionals.

Become a member

One simple way for you to learn more about these spaces is to enquire into membership at your local coworking space for yourself or your team, consider them as a part of your organisation's flexible work practices and offerings for staff.

Coworking spaces can be integrated into existing operations by becoming offsite places for team project work or meetings, giving employees creative surroundings for inspiration and project work "away from the office".

Coworking spaces also offer flexibility at times when the organisation is growing, allowing to scale staff and team sizes without having to procure additional office space straight away when the final needs are yet unknown.

Learn about new ways of working

Practically every coworking space hosts a range of learning and networking events that will expose you and your team to entrepreneurial thought leadership or creative approaches to doing business.

As almost all corporate offices have embraced ABW and open plan working, coworking spaces can offer creative alternatives and examples of "live experiments" that could be useful in the design of new workspaces, and the augmentation of existing ones. Most coworking spaces are open to sharing what they have learnt about how best to utilise the space to maximise both productivity and the collaboration or "accelerated serendipity" that coworking spaces often do so well.

Understanding the way knowledge flows through a physical space and work community is one of the greatest lessons that can be learnt from these spaces. Coworking spaces are thus a great way to get to know new ways of working and the associated office layouts in a risk-less way, without having to make any significant upfront investment.

One of the biggest learnings that coworking spaces can offer is that of the importance of community. Whether it be a small Social Studio of only 30 resident members, or a flourishing Corporate Community of several hundred active members, each has a unique approach to building a sense of belonging, a shared purpose which is underpinned by rites and rituals which can be translated into more established organisations looking to reinvigorate their culture.

Become a partner and connect

Many spaces actively welcome organisational partnerships and corporate sponsorship, recognising that they also have much to offer, and learn from, traditional businesses. Coworking spaces with a focus on start-ups can also present new investment opportunities for organisations and individuals looking to diversify their portfolio.

Finally, coworking spaces also offer a greater connection to the local community; something that can easily be lost when working in a national or multi-national organisation. Coworking communities pride themselves on "acting local, thinking global", and for this reason, we are seeing more new partnerships and collaborations between the "two ends of town" in these spaces. As a significant employer in Australia, small businesses are an important part of our country's work identity, with coworking spaces championing their cause.

Authors

Tim Mahlberg is the recipient of the Deloitte Australia and University of Sydney Business School Partnered PhD Research Scholarship to explore the future of work and the role of technology in helping people to lead more fulfilling and purposeful working lives.

Tim has a unique background which combines a natural curiosity about people, a passion for community work, and a dedication to creating meaningful work experiences. With a colourful career spanning corporate, non-profit/charitable organisations, consulting and customer service, he has also worked for over a decade as an organisational psychologist. He also founded Australia's largest coworking business community in Melbourne, which currently has over 2500 members.

Kai Riemer is Professor of Information Technology and Organisation in the Discipline of Business Information Systems. He joined the University of Sydney in August 2009 from Münster University in Germany, where he held a position as Assistant Professor. He received his Diploma in Information Systems (Dipl. Wirt-Inform.) and his Ph.D. in Management from Münster University, Germany, where he also finished his Postdoctoral thesis (Habilitation). Kai's research interest is in Disruptive Technologies, Enterprise Social Media, Virtual Work, Collaborative Technologies and the Philosophy of Technology. In one current research stream he focuses on the introduction and management of Enterprise Social Networking into organisations and the elicitation of associated benefits. Kai leads the Digital Disruption Research Group at the University of Sydney.

Glossary

Coworking The practice of working alongside people with whom one shares a workplace but not an organisational affiliation.

Coworking space Spaces shared by people from different organisations, often freelancers, who work alongside each other, share infrastructure and often engage in joint activities associated with learning and innovation.

Coworking member Someone who subscribes to and utilises a coworking space, usually for a fee, on a regular basis.

ABW Activity-based working. Refers to a workplace design principle that provides a variety of working environments that the worker is able to choose from, depending on the kind of work they need to perform.

Flexible work A work arrangement, usually agreed with an employer, that allows the employee to work from places outside of the usual work environment (usually the office). It typically refers to working-from-home arrangements, but may include working offices that are closer to home, or from a local coworking space. Sometimes the term is also used to describe arrangements of working irregular hours that suite a particular lifestyle or commitment (e.g. as a care-giver).

Start-up A new, emerging business venture, usually without established income streams, relying on (early-stage) investor funding.

Entrepreneur A type of professional who is creating a new business model or new market for their product or service.

Hackathon An event where new business models are created and shared in small teams, ending in a formal presentation to a panel of judges. Often run from coworking spaces in partnership with corporate sponsors.

Host The person who greets you as you enter a coworking space, and helps you to engage with events and other members; also sometimes called a Concierge or Community Manager. This person is most often employed by the coworking owner, but may also be a volunteer or one of the coworking space members.

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Sydney Business Insights_

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Sydney Business Insights brings together insights from our researchers with insights from leading thinkers in industry, government and community.