

Europe Coworking Spaces - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Coworking Spaces Market size is estimated at USD 7.23 billion in 2025, and is expected to reach USD 11.84 billion by 2030, at a CAGR of 10.37% during the forecast period (2025-2030).

Key Highlights

- The coworking spaces market in Europe defied the odds in 2023, according to Workthere. The flexible office specialist estimated that operators would continue to look for top-of-the-line spaces with more emphasis on facilities and sustainability in 2024.
- With talent attraction and retention at all-time highs, there will continue to be a demand for top-of-the-line space, and operators will need to step up their game by offering more amenities. To compete for tenants and attract new ones, operators are already setting standards that go beyond gyms, yoga, cafes, and outdoor space to include amenities like five-star hotels with private chefs or rooftop bars.
- While occupiers are looking for the best locations, they are also looking for locations that offer the best transport connections and full amenities for their employees. For many markets, this has led to an increase in the number of flex office operators operating in central business districts (CBDs), which is expected to continue in 2024. On the other hand, a shortage of office space in Europe, particularly in major cities such as Madrid, Munich, and Barcelona, where vacancy rates are well below 5%, will have a major impact on occupancies and availability.
- Operational costs have increased over the last two years, impacting profit margins for a number of operators, and while the desk prices increased at the high end in most European cities, it has been more difficult at the low end. Operators are projected to place a genuine emphasis on profitability in 2024 by looking for opportunities to grow margin outside of desk rates and by looking at ancillary revenue, including through more sales of meeting rooms and events, more sales of coworking desks, or upselling technology packages to their customers.

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Europe Coworking Spaces Market Trends

Market Growth Driven by the Increasing Number of Startups and Small Businesses in Europe Looking for Flexible and Affordable Office Spaces

Flexible offices and coworking spaces come in handy for startups because they can save a lot of money on renting, leasing, or buying office space. They can avail of office space according to their needs, budget, and time.

As coworking becomes more popular, more entrepreneurs are talking about how coworking also helps with essential networking. Coworking offers a lot of flexibility when it comes to leasing, and there are several different options to choose from. It also offers the advantage of being able to work from anywhere in the world, as well as being able to work in premium and easy-to-access locations.

In December 2022, the United Kingdom had more than 700 e-commerce startups registered, making it the largest e-commerce startup ecosystem across Europe. In comparison, France had 270 e-commerce startup companies registered, second only to Germany, which had less than 250 startups registered. Just one year earlier, Germany had the second-largest e-commerce and retail startup ecosystem across Europe.

In Germany, the e-commerce industry ranked sixth among industries with the highest number of startup investments in 2022, after industries including health, energy, software, and analytics. However, by May 2022, Germany was home to four of the top European e-commerce B2B startups in terms of overall funding.

Rise of Remote Work and Growing Demand for More Flexible Work Arrangements are Driving the Market

Coworking spaces are fast becoming the perfect fit for businesses. The world is rapidly moving toward coworking spaces that offer the flexibility and space to grow.

The freedom afforded by working from home, according to the research of 1,000 business leaders, is set to permanently alter the way people work. A study found that nearly half of the enterprises with office space (45%) plan to downsize by the end of 2025, and one in seven (18%) have already done so since the COVID-19 pandemic began. According to the study, about 18 million sq. ft of office space will become obsolete in the next five years, accounting for 18% of all currently occupied square footage. This is expected to have a significant impact on the way UK cities appear and feel.

UK businesses are also looking for shorter, flexible leases, which is increasing their adoption of coworking spaces such as WeWork, with 12% intending to use these locations more often instead of an 'owned' office. Among businesses planning to stick to the office, 13% stated they would look for accommodation with less desk space per head as the office's main function would now shift toward more space for collaboration, such as break-out areas and meeting rooms.

In this new landscape, flexibility is the driving force for change, transforming office spaces into spaces of possibility. For example, small office spaces outside of London are attracting teams for under EUR 265 (USD 287.51) per person per day. These flexible spaces respond to the ever-evolving nature of modern workspaces that not only function but also respond to the evolving needs of contemporary professional life.

Europe Coworking Spaces Industry Overview

The industry is quite fragmented, with many players operating in the European coworking spaces market. Many more are also

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entering the market to cater to the rapid demand for offices with casual environments. Some major players in the market include KAPTAR, Mindspace, BounceSpace, Second Home, and Tribes.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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