

SURVEY REPORT

2018

45 countries
979 workspaces

Following a good tradition, MatchOffice presents a comprehensive industry survey. In 2018, 979 flexible workspaces have responded to our questions. Discover how the industry has evolved over the last year and how providers see the future.



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The most recent information on the flexible workspace industry:

The MatchOffice Survey Report 2018

For the fourth consecutive year, we have invited our partners from all over the world to participate in our industry survey. In the report, you can find year-on-year statistics on office occupancy, achieved and expected price level and providers' outlook on business.

In 2018, we acknowledge that the industry has fulfilled providers' aspirations for growth, and, like in previous years, has shown its great potential. We can confidently say: the best is yet to come.

We are extremely grateful to all our partners who kindly agreed to participate in our survey and share valuable information on this year's business results and plans. It is a genuine pleasure for us to present MatchOffice industry survey 2018.

I sincerely hope it will fulfill its purpose of providing you with the most recent industry insights.



MatchOffice

Jakob Dalhoff
CEO, MatchOffice

Europe

A growing number of workspaces experience occupancy rates above 90%

2018 has started successfully

for the European market, and most positive trends that we could observe in 2016 have been further developing. The proportion of offices that are more than 90% occupied is rising in many European countries, with some workspaces very likely to hit record levels soon. Nevertheless, the overall occupancy growth has slightly slowed down compared to last year as it is getting progressively more difficult to maintain the fast pace.

With all the positivity and impressive achievements,

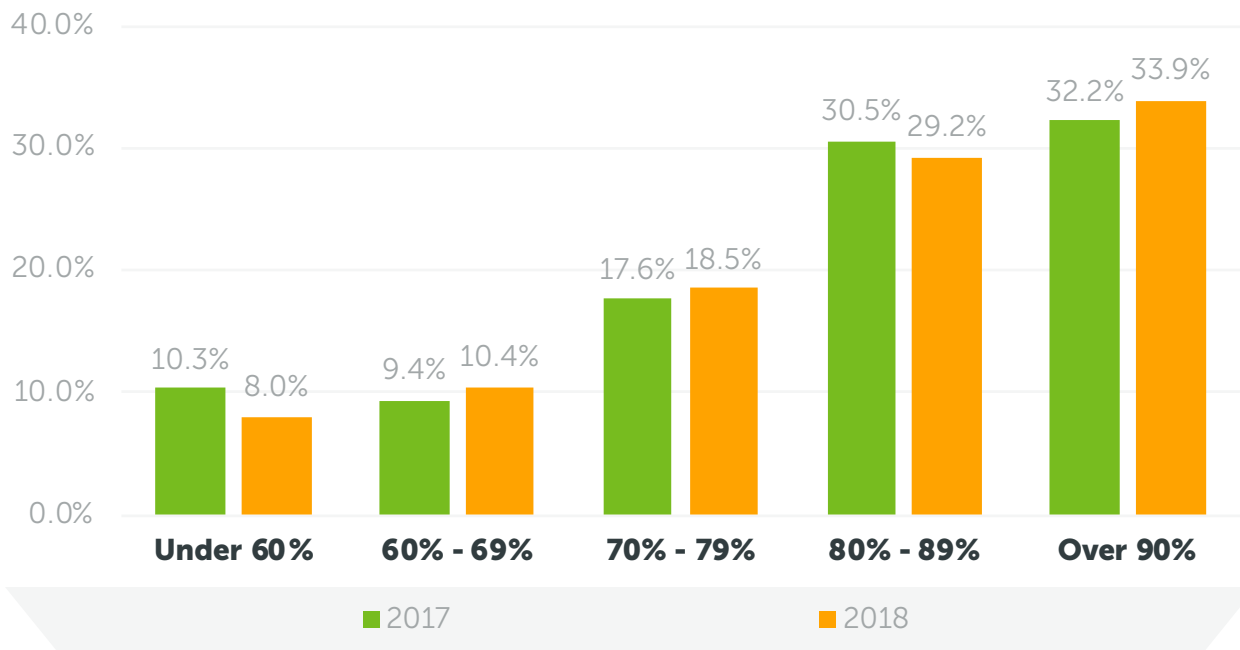
it is not surprising that over half of all providers expect higher occupancy, and over a third - higher rental rates soon. However, now the majority have the same prices as last year, which might be another way to stay competitive and retain many clients.

Stability in contract lengths, achieved by over 70% of providers, has been another marked tendency since 2016. It seems the industry has established a reasonable standard, which is suitable both for providers and tenants.

“ 70% of the respondents have an optimistic outlook for the industry, and the obtained survey results confirm our diagnosis for the European market: healthy and thriving. Furthermore, it has a good growth potential as many providers are expanding their business to new cities and countries - Jakob Dahlhoff says.

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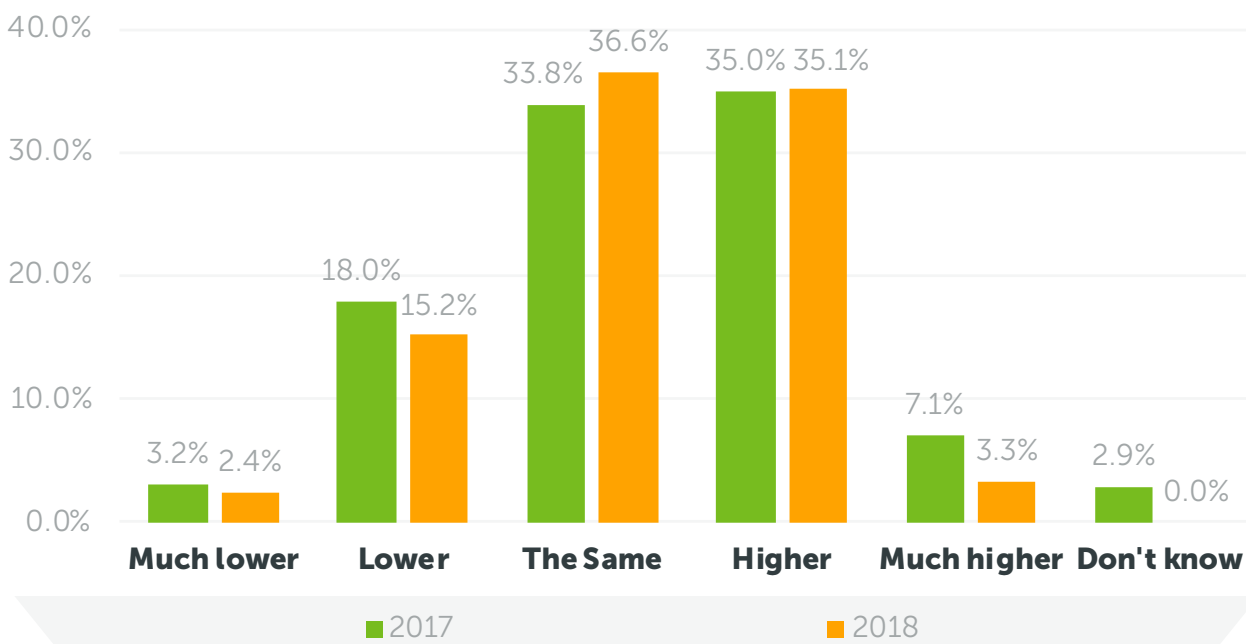
Average office occupancy



The number of offices with occupancy **under 60%** has been **decreasing** for the second year in a row. **Minor** fluctuations can be also observed in four other bands with a positive **1.7%-points growth** in that with **90%** occupancy.

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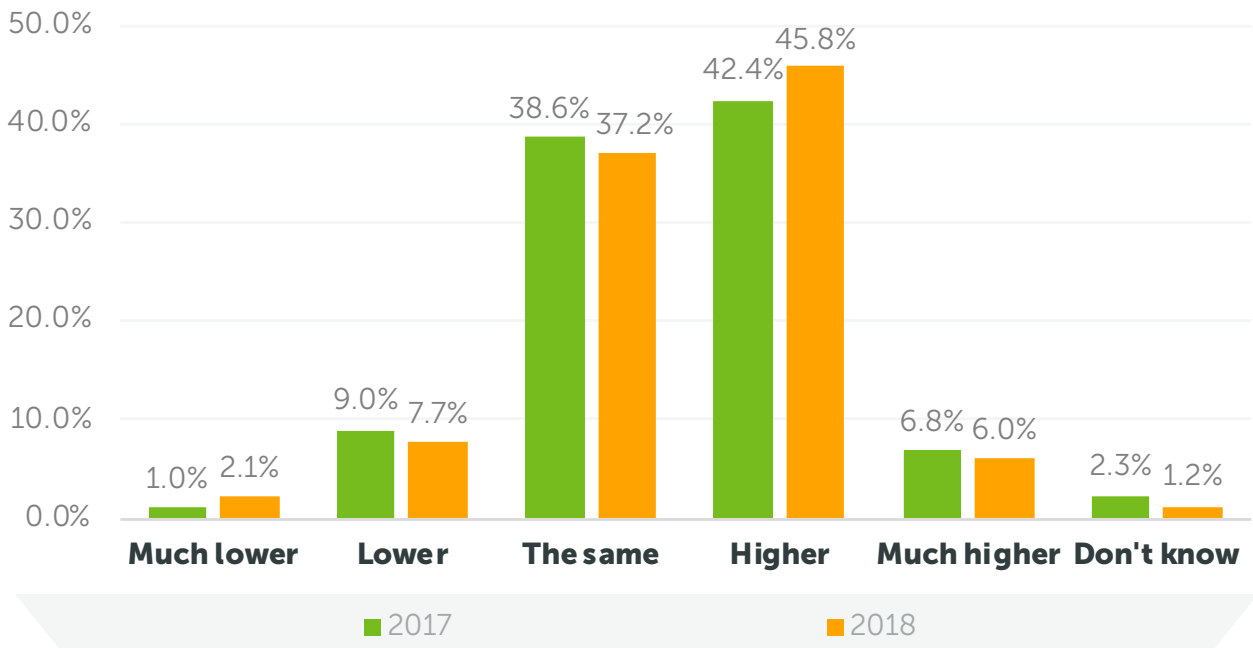
Occupancy compared to last year



17.6% of all providers have **lower** or **much lower** occupancy compared to last year - a positive **3.6%-points** change. We can also observe an **increase** in the same occupancy band against 2017 - a **2.8%-points**, whereas **3.8%-points fewer** respondents have reported **much higher** occupancy.

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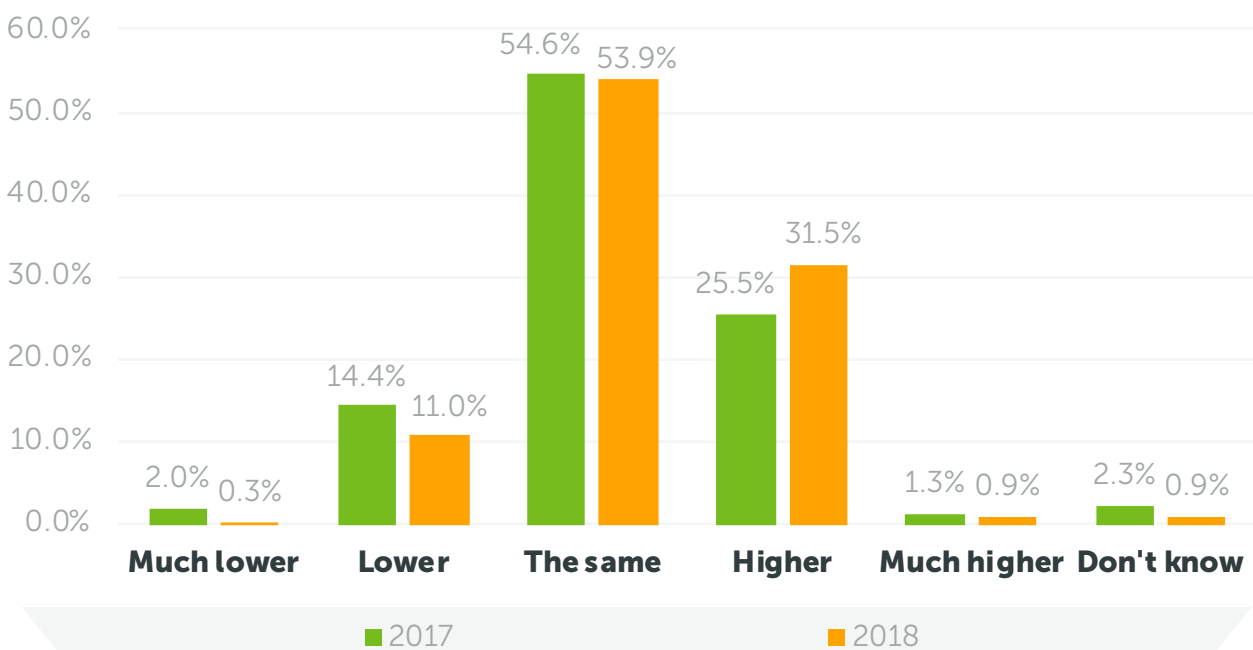
Occupancy expectation in 6 months



In 2018, more providers expect **higher** occupancy - **3.4%-points increase**. All in all, **over half** of all respondents aspire to let more space in the future with only **one-tenth** believing they will have **fewer** tenants.

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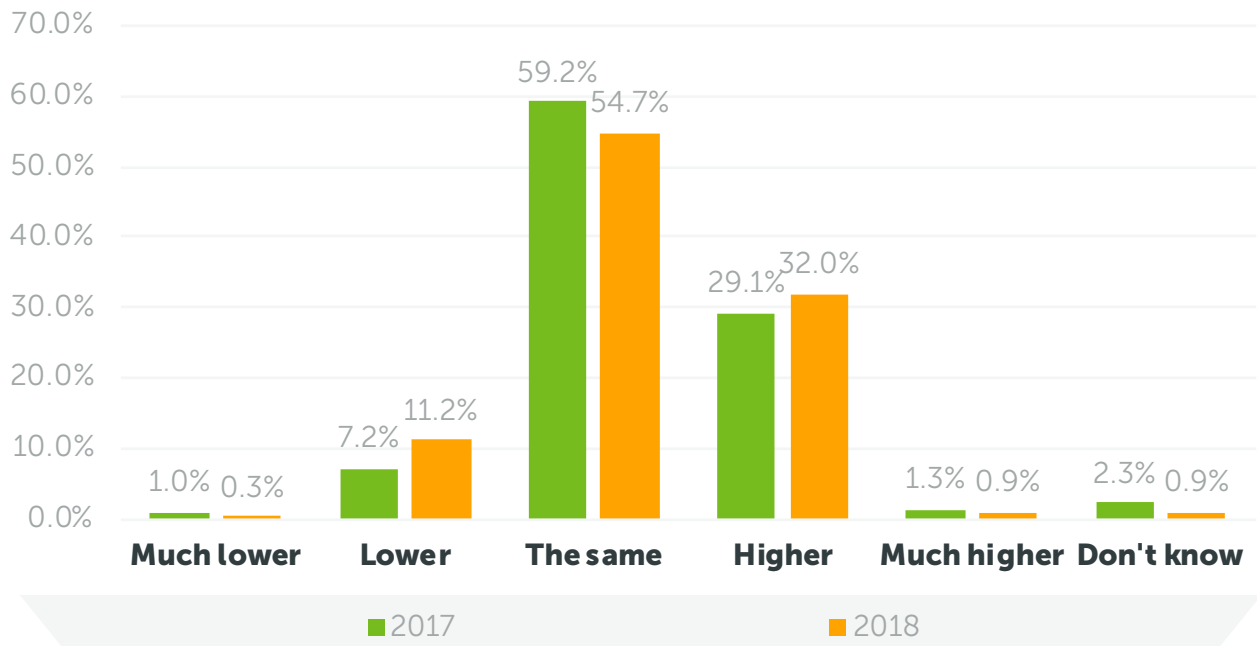
Achieved prices for office contracts or workstations compared to last year



The **popularity** of workspaces is obvious as almost **one-third** of them have **higher prices** - a noticeable **6%-points increase** on last year's figure. Like in 2016 and 2017, **over half** of providers **maintain** the same prices to stay competitive.

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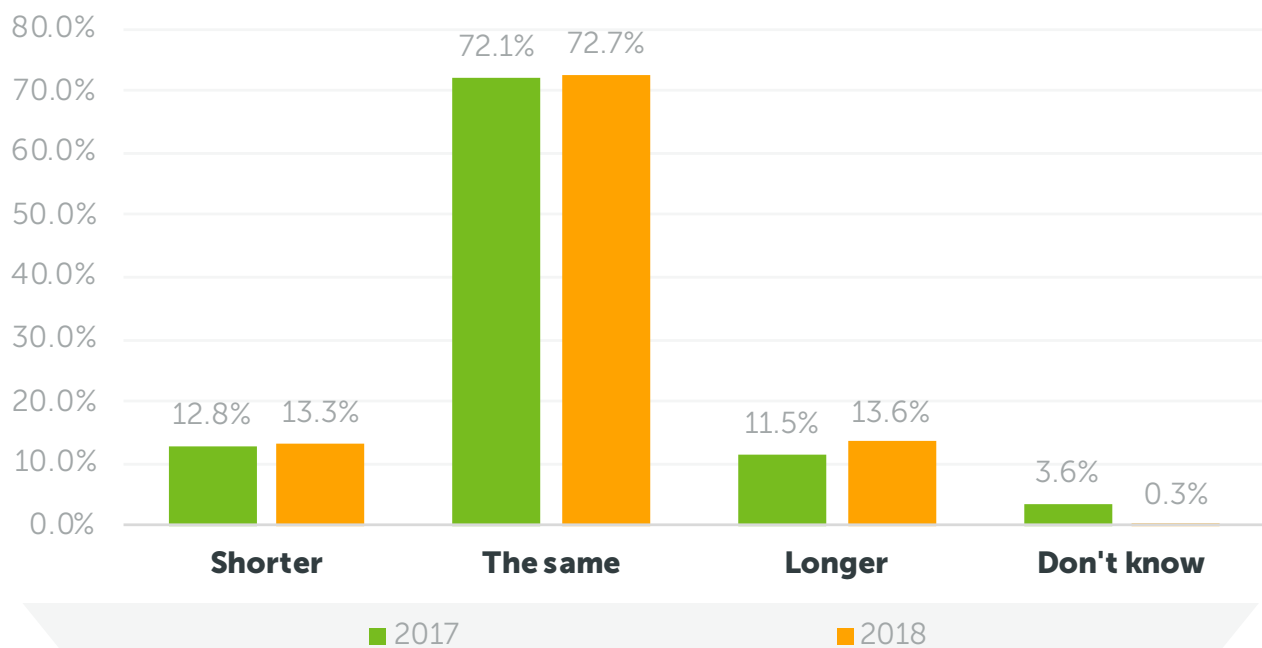
Expected price level in 6 months



We can see a **4.5%-points decline** in the number of providers predicting the same prices in 6 months. Higher price expectations are a tendency continued from 2016 - an appreciable **8.6%-points rise**.

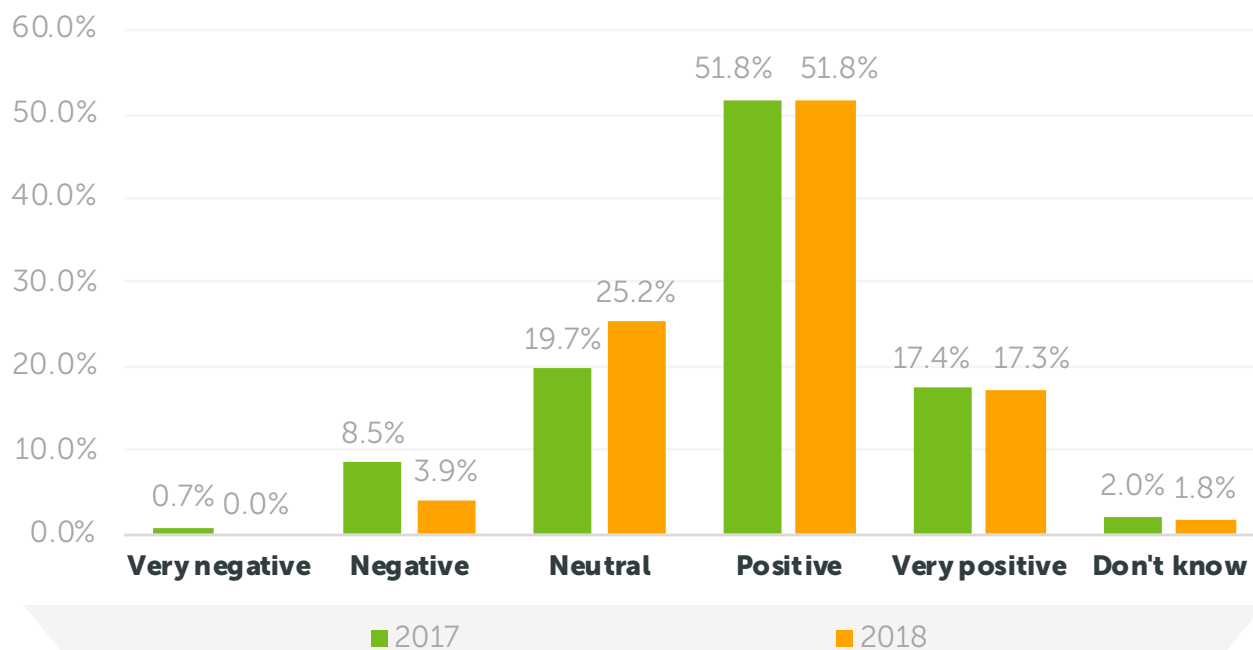
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Initial contract length compared to last year



The graph shows another marked tendency for stable contract length since 2016. Despite **slight shifts** in shorter and longer contracts against last year, contract length might not be a competitive factor as it has become **standard** in the industry.

General outlook



In 2018, we can see an **inspiring 4.6%-points fall** in respondents with a negative attitude, whereas the number of neutral has also gone up. Almost **70% feel positive or very positive** about the industry prospects - the same sentiments as last year.



Belgium

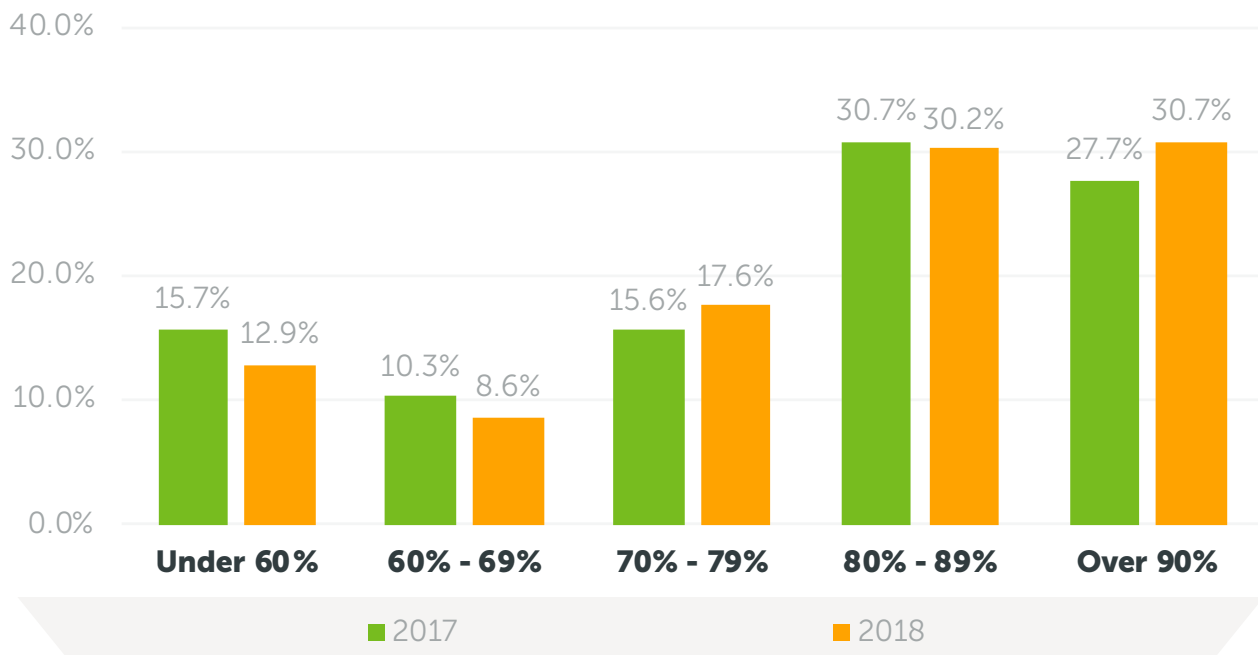
Like in two previous years, the number of workspaces with very high occupancy has risen. Compared to 2017, some providers have improved their occupancy performance, and over half of them predict that it will further grow.

Most respondents have the same prices and contract length as last year. Two-thirds of them see the future positively.



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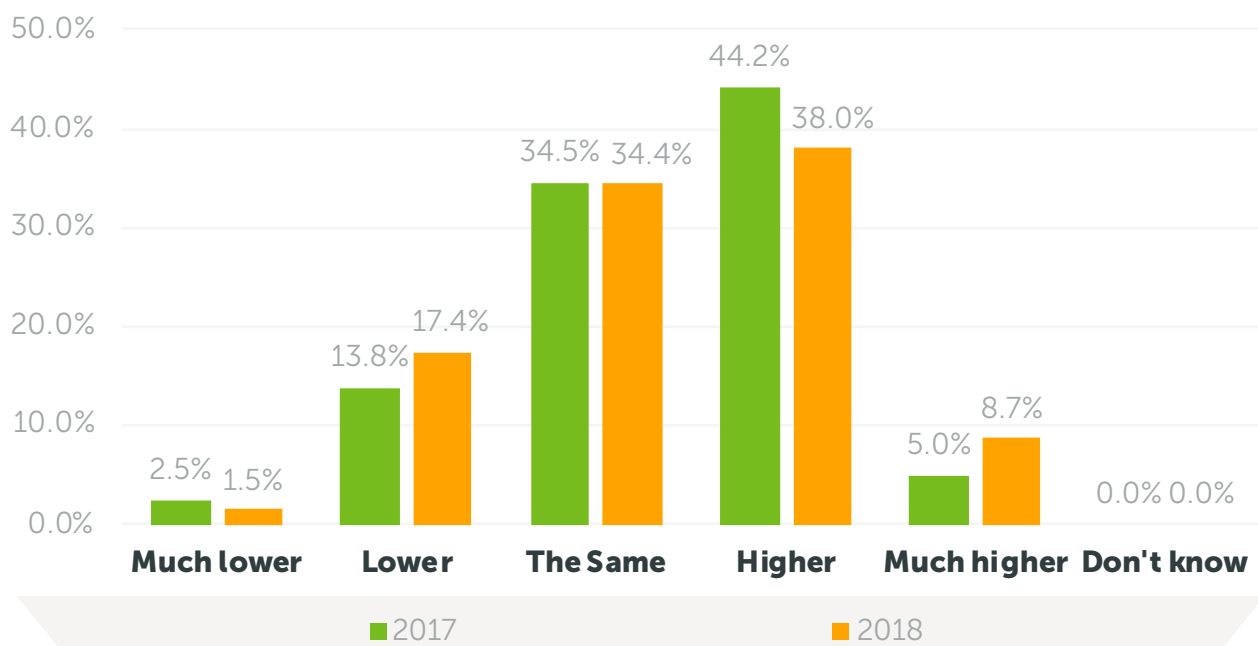
Average office occupancy



The number of flexible workspaces with occupancy **under 60% and 69%** has been decreasing since 2016. **Over 30%** of the workspaces are almost fully occupied - **7.5%-points increase** compared to 2016, which shows that top locations have become even more popular.

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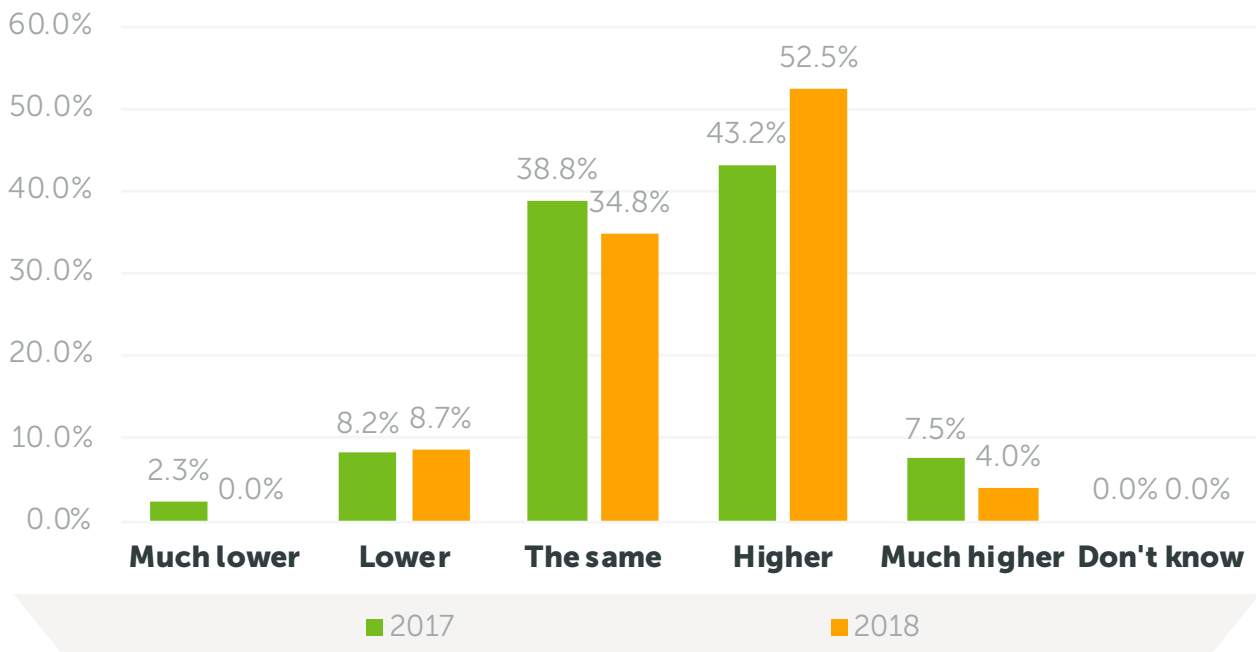
Occupancy compared to last year



Over **one-third** of the respondents have the **same** occupancy as last year. Despite the year-on-year **decrease** in higher occupancy band, **46.7%** report having rented out **more** or **much more** spaces. These figures show that the Belgian market is developing steadily and resembles the European.

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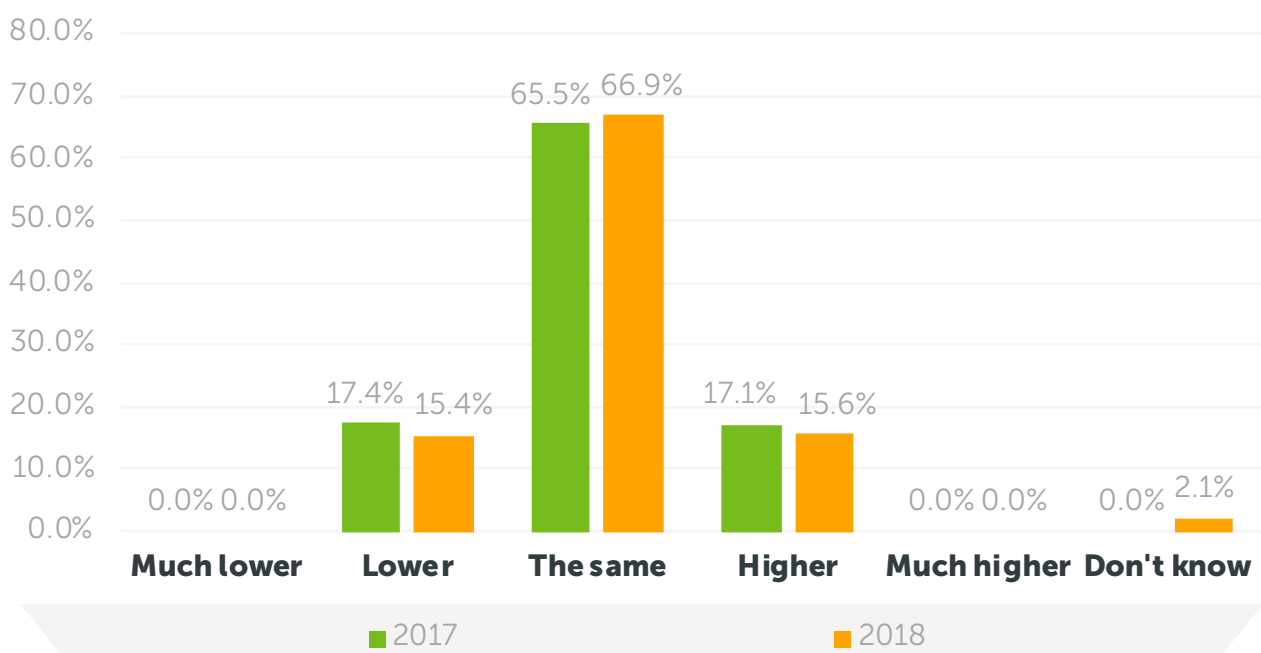
Occupancy expectation in 6 months



No much lower occupancy expectations together with a marked shift from the same to higher testify to providers' **growing confidence** about the future. Only **8.7%** of them predict fewer tenants.

4

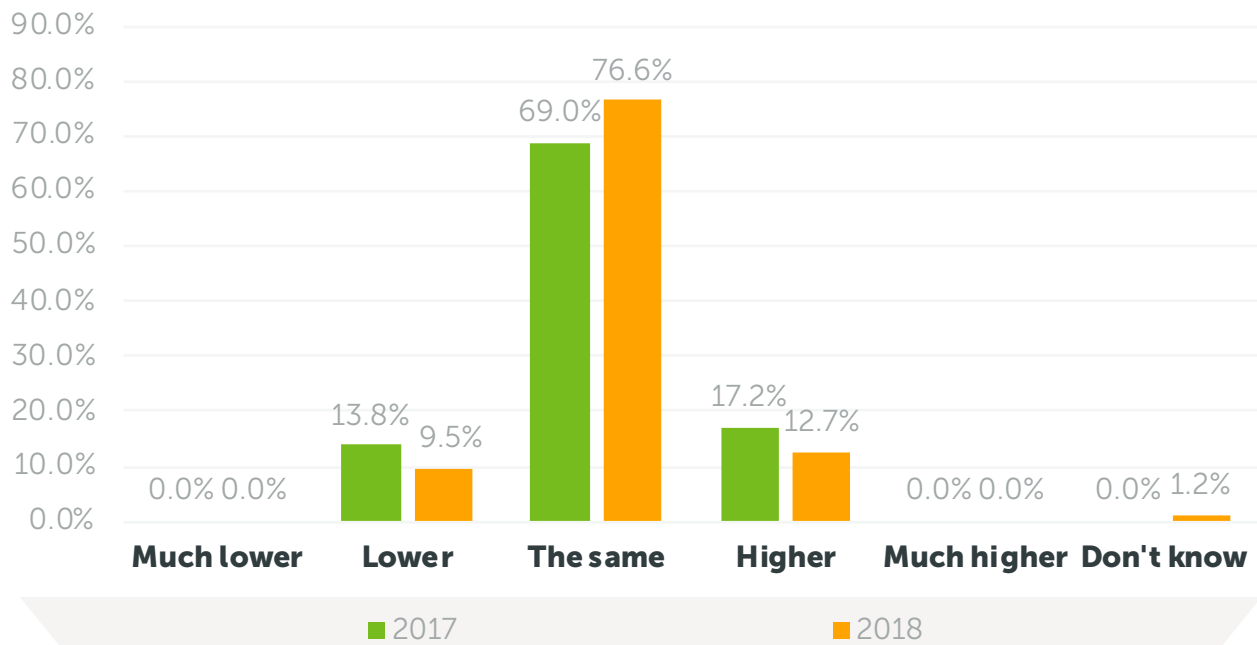
Achieved prices for office contracts or workstations compared to last year



Almost **67%** of all providers in Belgium **maintain** the same level of prices as last year. Interestingly, there have not been any drastic price changes compared to 2017. Furthermore, the proportions of those having both lower and higher prices have also **slightly decreased**.

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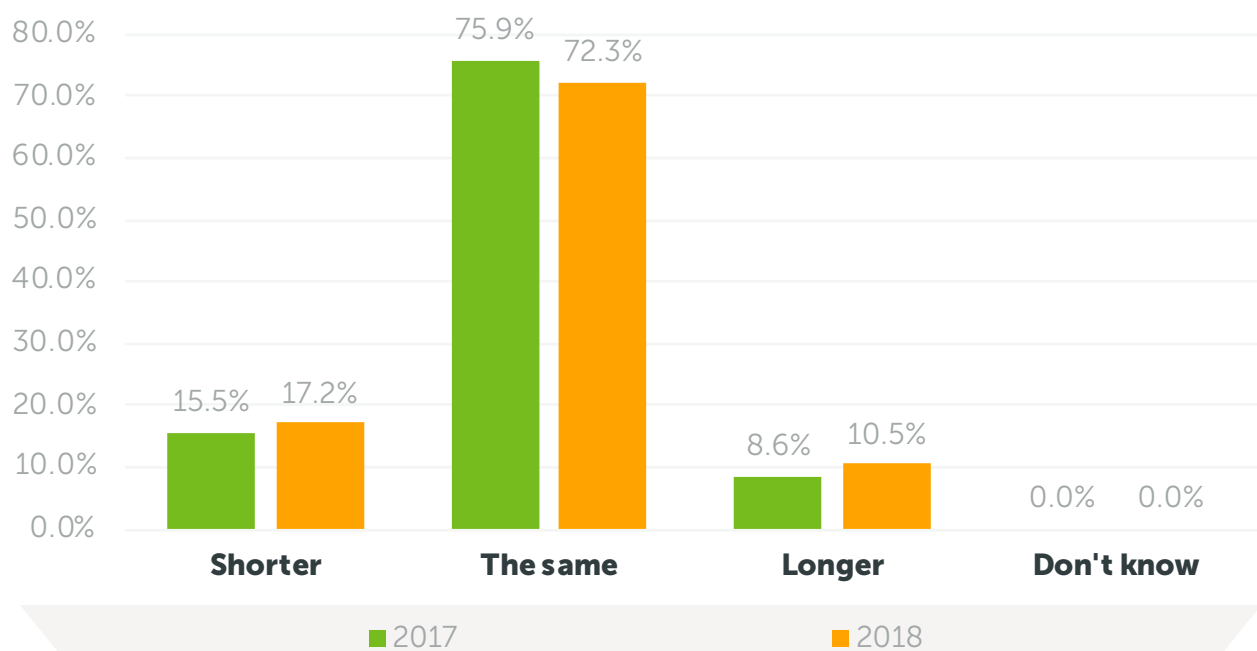
Expected price level in 6 months



This graph **strongly** resembles the one showing the achieved prices. Only **15.6%** of the respondents have experienced an **increase** in prices. Unsurprisingly, even more **expect** the rates to remain the same in 6 months - a noticeable 7.6%-points growth on last year's figure.

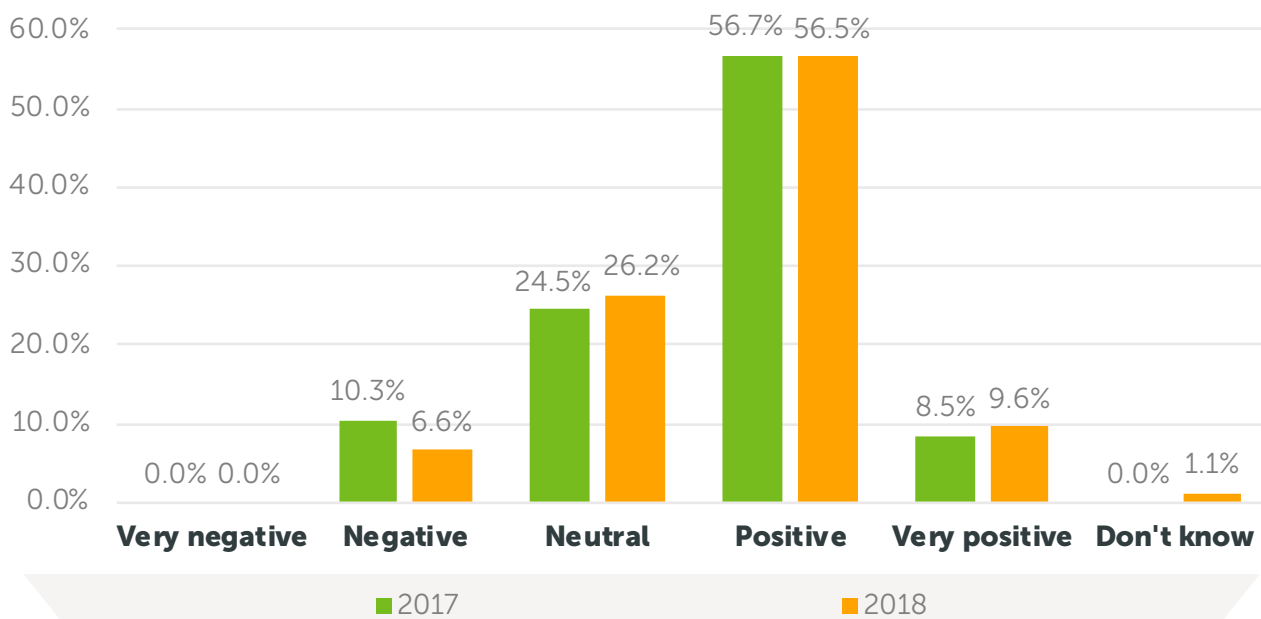
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Initial contract length compared to last year



Approximately **two-thirds** of all flexible workspaces have **the same length** of contract as in 2017, whereas the number of both shorter and longer contracts has slightly **increased**. Overall, the situation looks stable.

General outlook



The number of providers with a positive outlook is virtually **unchanged**, with a **1.1%-points increase** in those who are highly optimistic about the future. The decline in the negative band is also heartening.



Denmark

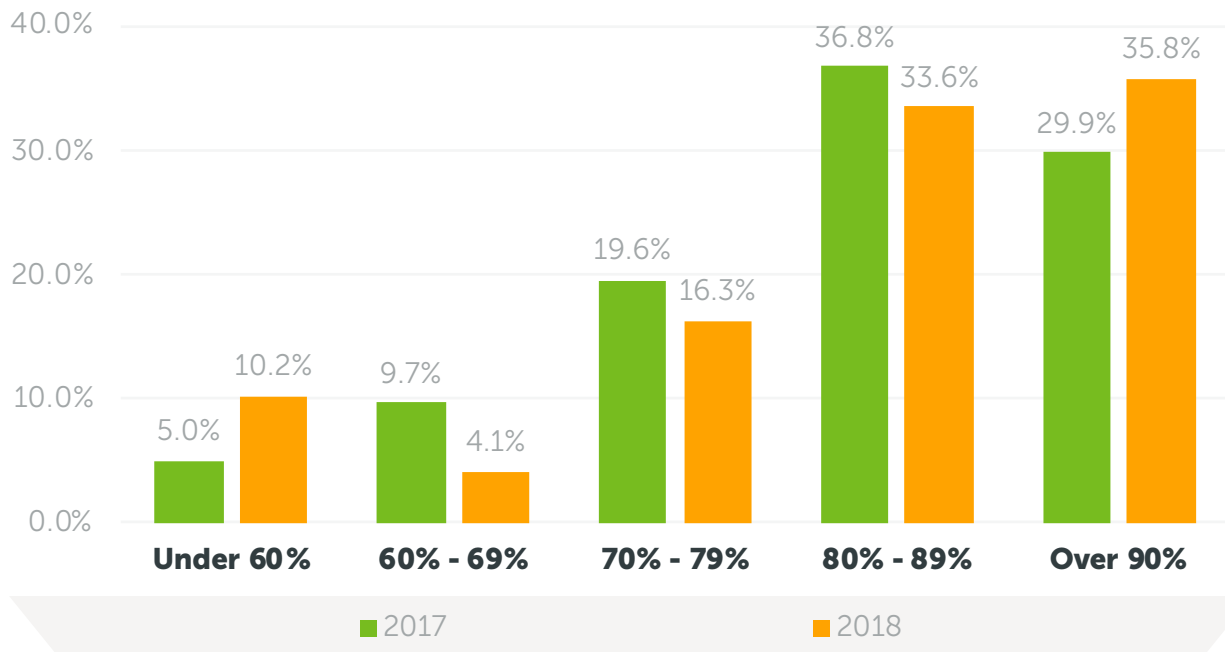
Like in Belgium, there has been an increase in the highest occupancy band, whereas the opposite one has also doubled.

With many new flexible workspaces in big cities like Aarhus and Copenhagen, the market is becoming even more competitive. However, the buoyant demand in the Danish market allows providers to increase prices without losing tenants.



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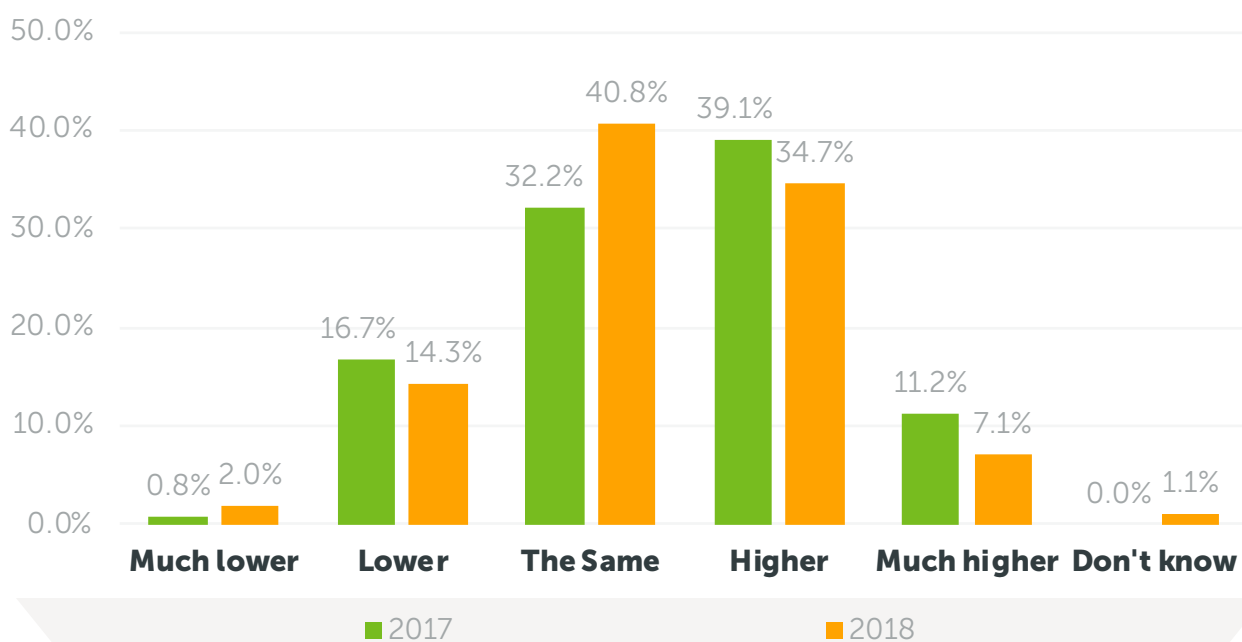
Average office occupancy



The market has become even more competitive in Denmark in 2018, with a **5.9%-points increase** in flexible workspaces with the highest occupancy and the doubling of those that are less than **60%** occupied.

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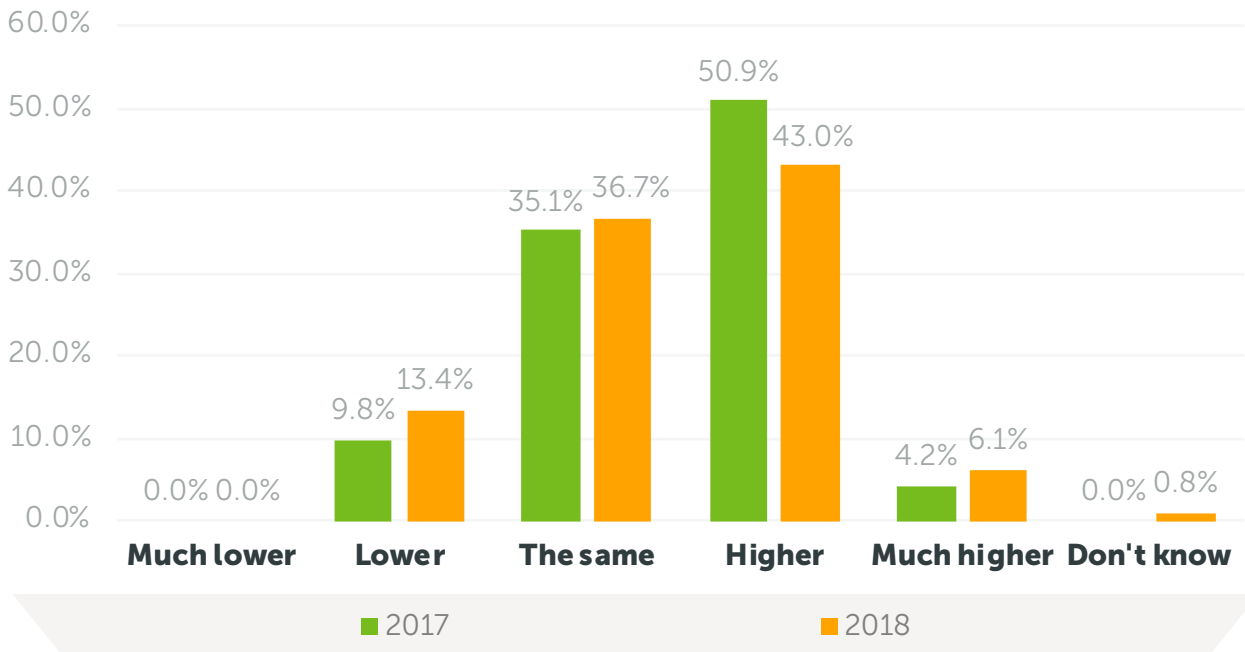
Occupancy compared to last year



The market shows even more stability: **40.8%** of all respondents have the same occupancy - an **8.6%-points increase** against 2017. Naturally, there are **fewer** workspaces with lower, higher and much higher occupancy, and only **1.2%** have lost a big share of tenants.

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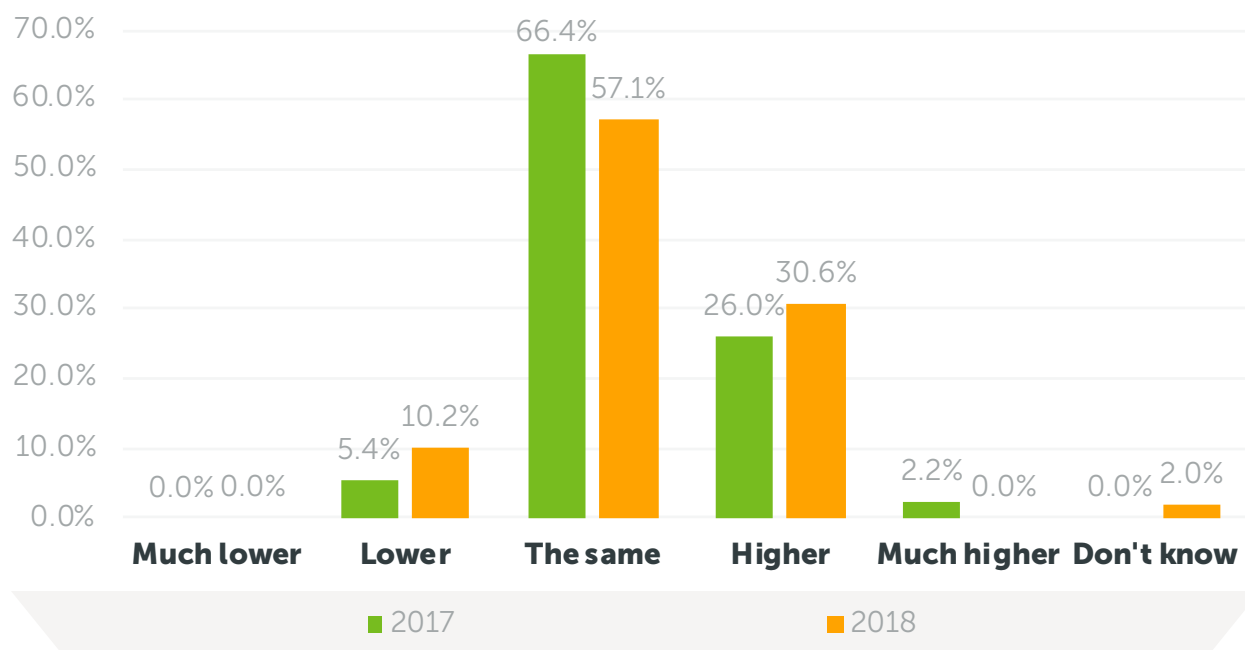
Occupancy expectation in 6 months



The situation is still **very healthy** in Denmark. Almost **half** of all respondents expect the occupancy to be higher or even much higher in the months to come, whereas about a **third** believe they will have the same occupancy performance.

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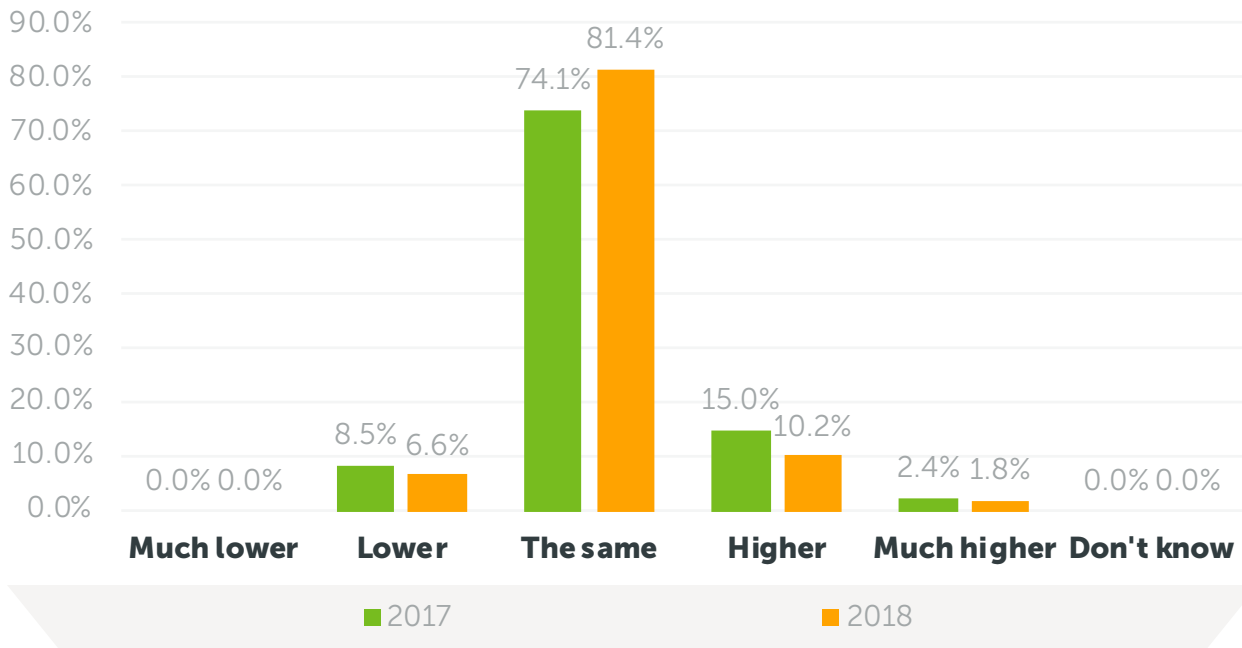
Achieved prices for office contracts or workstations compared to last year



The graph shows that **over half** of all providers have the **same** prices as in 2017- a **9.3%-points decrease** since last year. Naturally, we can observe **some growth** in higher and lower prices bands, which again testifies to the overall market balance.

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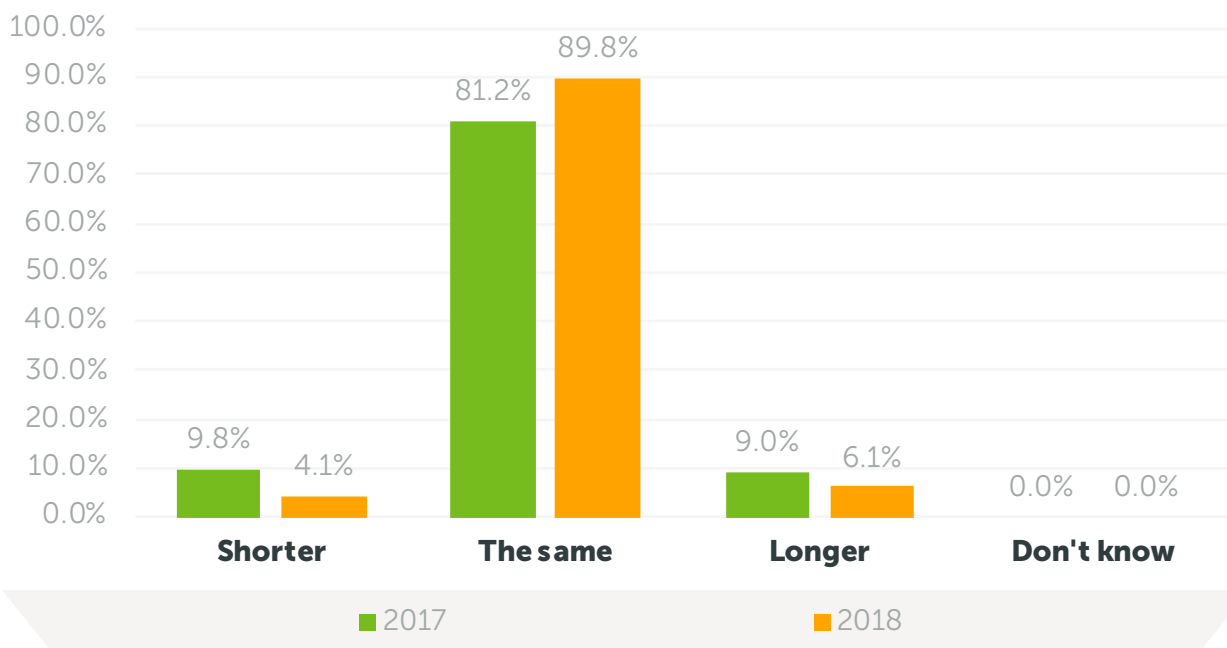
Expected price level in 6 months



The vast majority of the respondents do not expect the prices to change. The number of providers predicting that the rent price will rise or fall has **decreased** by **4.8** and **1.9%-points** respectively. Interestingly, **1.8%** believe it will soar shortly, and none - that it is likely to nosedive.

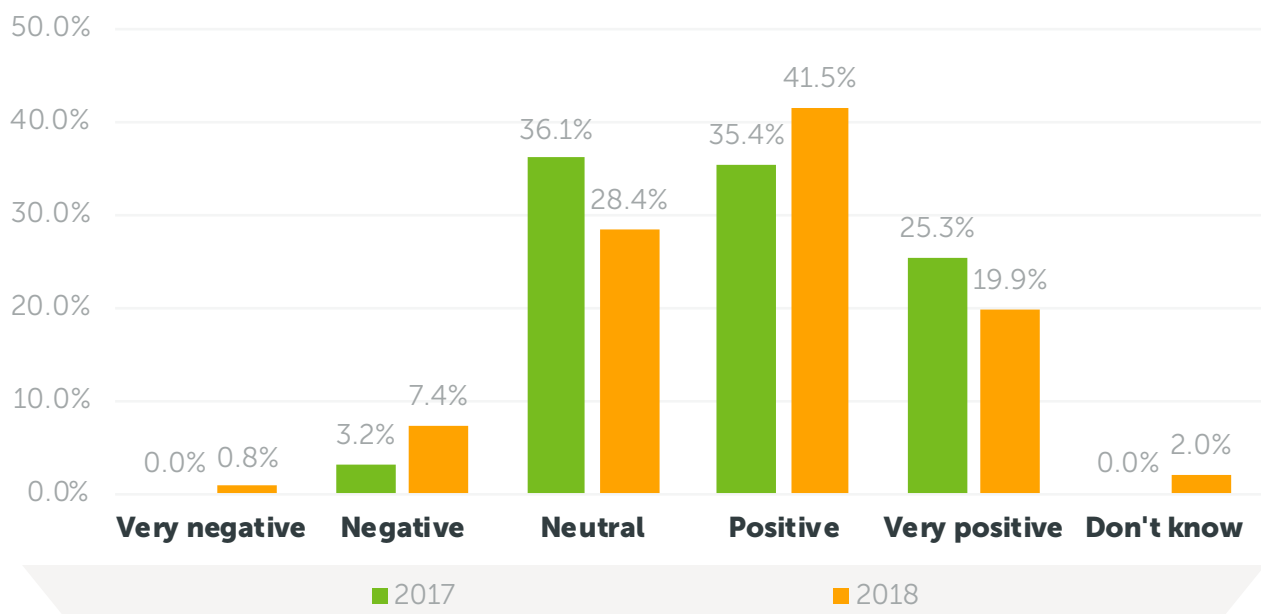
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Initial contract length compared to last year



Almost **90%** of all respondents have the same length of contracts as last year. It seems that tenants have decided on the most convenient format and stuck to it consistently.

General outlook



Fewer respondents preserve neutrality this year - a **7.7%-points decrease** against 2017. It is inspiring to see that **over 60%** of providers have a **positive** outlook or even believe the flexible workspace industry is really auspicious in Denmark.



France

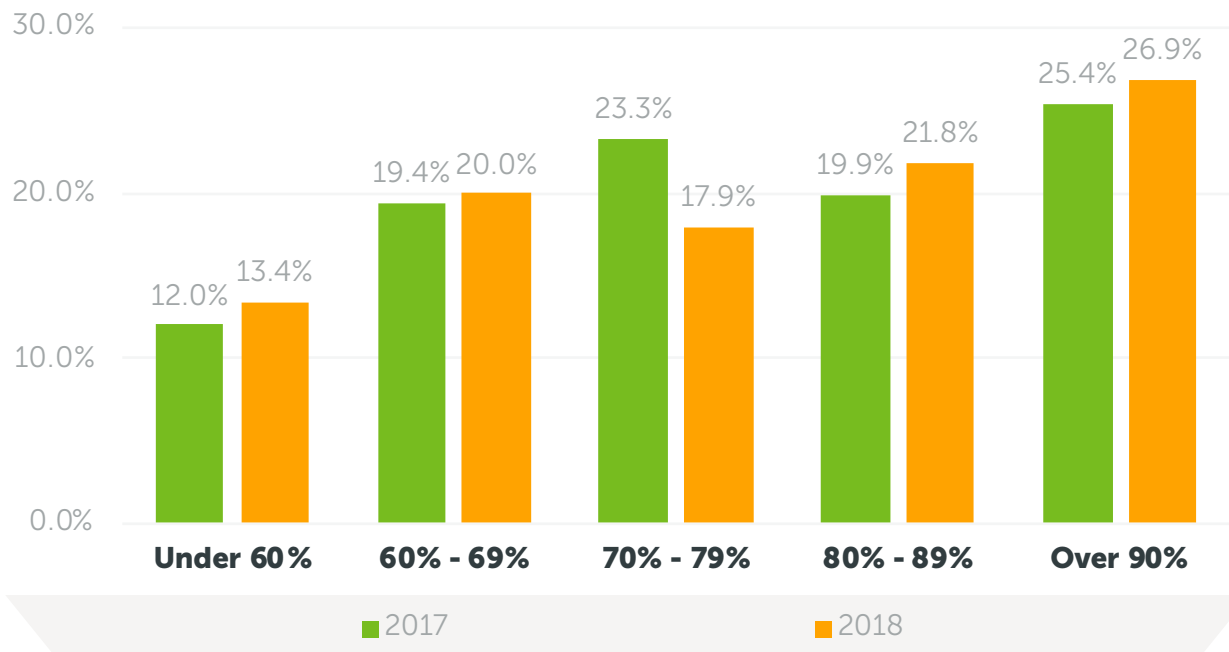
A quarter of all workspaces that participated in our survey are almost fully occupied. Over 40% have reported the same occupancy as last year, with nearly equal proportions of those who have either more or fewer tenants. Over 20% of providers have negative occupancy expectations.

These results might account for virtually the same proportion of those having pessimistic sentiments.



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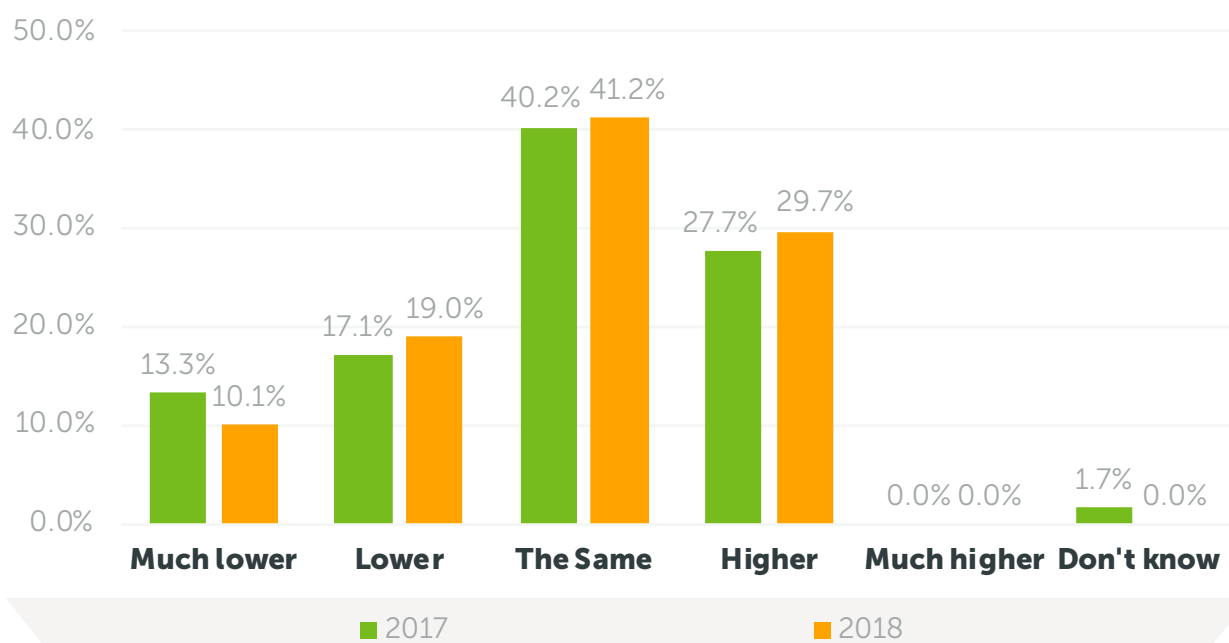
Average office occupancy



Almost **half** of all respondents report occupancy higher than **80%** - a **3.4%-points increase** against last year. The most significant change can be observed in workspaces with **70-79%** occupancy - a **5.4%-points reduction**, while the number of those with lower occupancy has risen, too.

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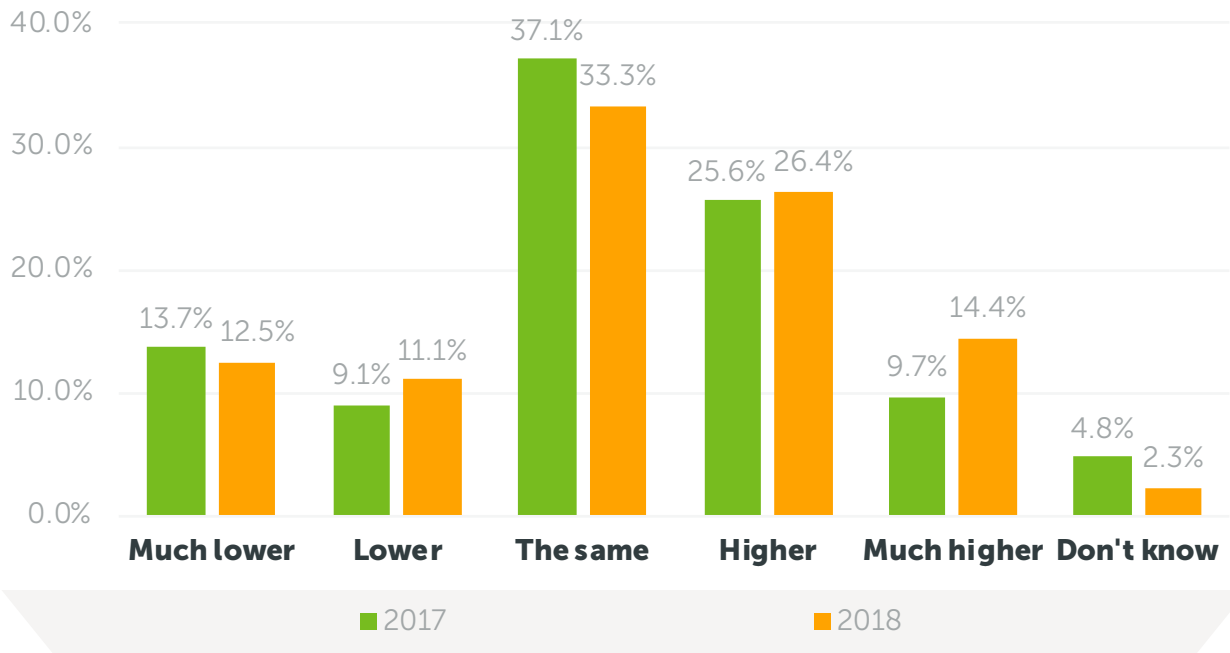
Occupancy compared to last year



Like in 2017, about **40%** of providers **maintain** the status quo. Almost **30%** have **strengthened** their competitive position and reported higher occupancy, whereas the same proportion is faced with an opposite situation.

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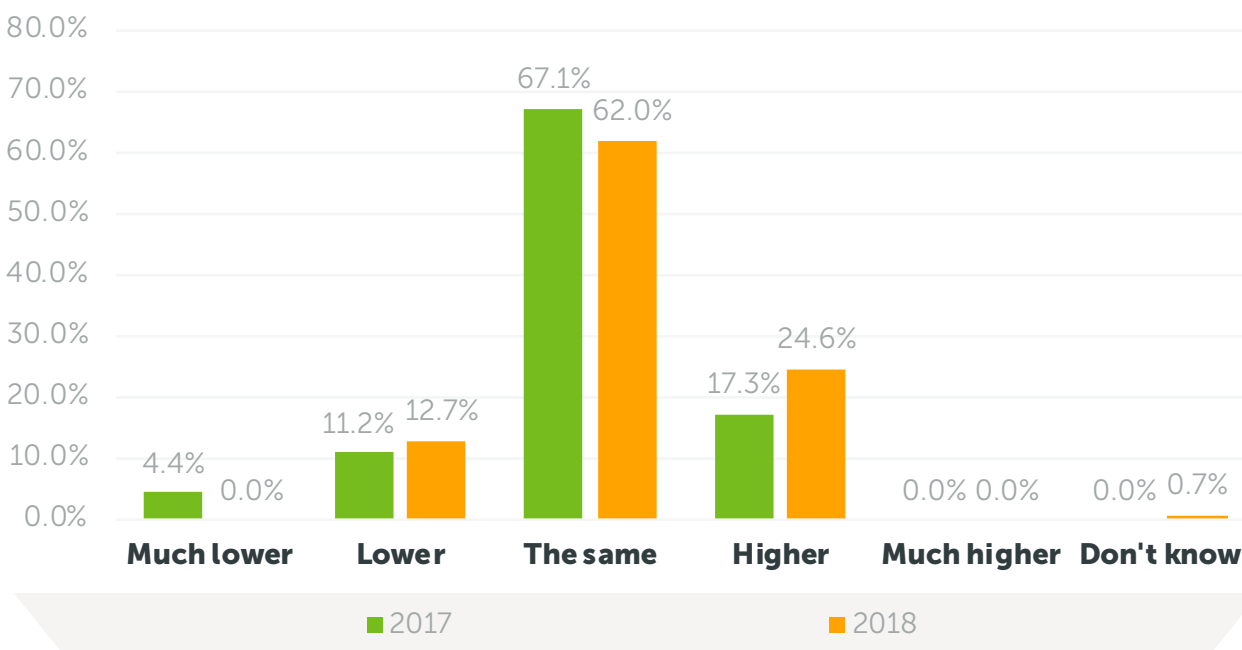
Occupancy expectation in 6 months



Like the previous graph, this one shows that the market is not homogenous in France. Over **40%** of respondents have high occupancy aspirations, while the rest are not so optimistic.

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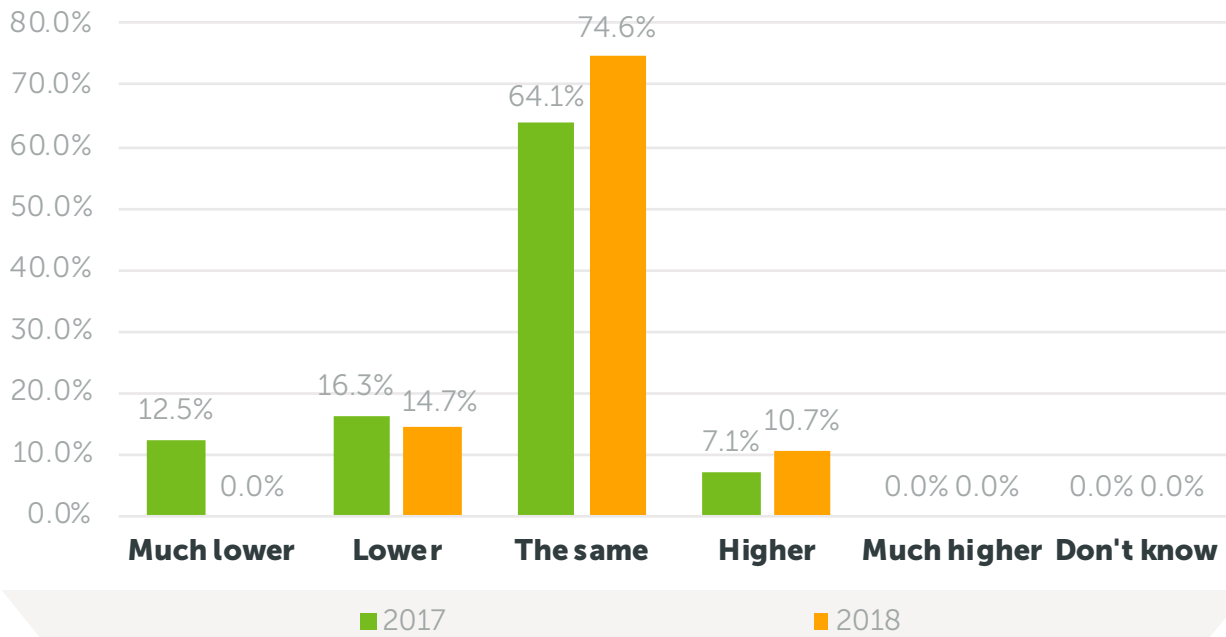
Achieved prices for office contracts or workstations compared to last year



There is a **noticeable** shift from the same to higher prices year-on-year. We can assume that providers who have higher occupancy have also **increased** rental rates. However, **more than half** have not changed their pricing policy since 2017.

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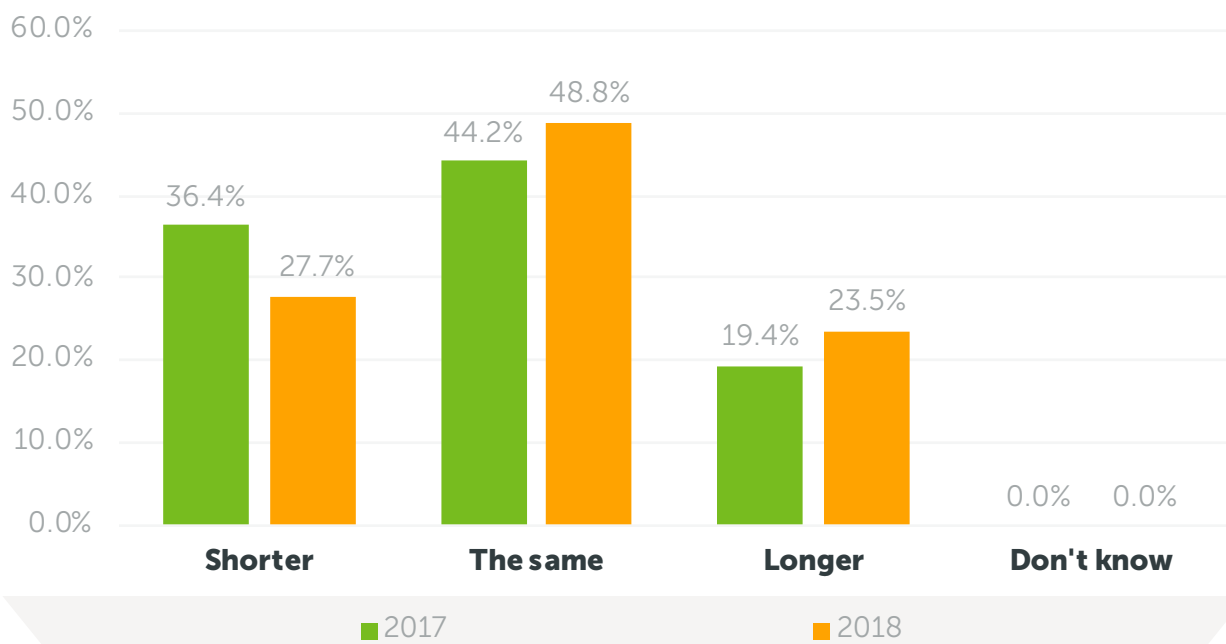
Expected price level in 6 months



Compared to 2017, we can observe **10.5%-points growth** in providers predicting the same prices in six months. However, the most substantial change is that **none** of the respondents expect much lower prices in the future. Moreover, none see any grounds for rental rates to skyrocket.

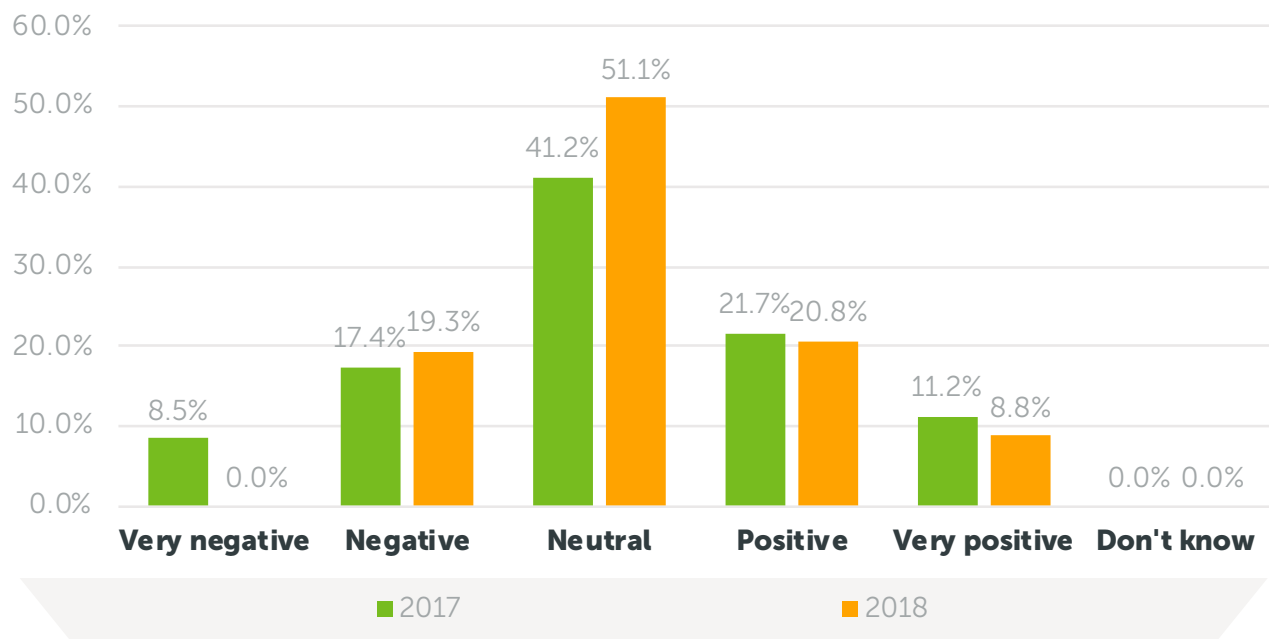
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Initial contract length compared to last year



This year, **fewer** providers have signed shorter contracts - a **7.7% decrease** against 2017. Interestingly, the upward trend in the longer contracts band can be observed for the second year in a row, which might be an encouraging sign.

General outlook



Negativity in the French flexible workspace industry has subsided in 2018. However, still almost **one-fifth** of respondents have a pessimistic outlook, which might be explained by the downward trend in occupancy. **Over half** of all providers are neutral about the industry prospects.



Germany

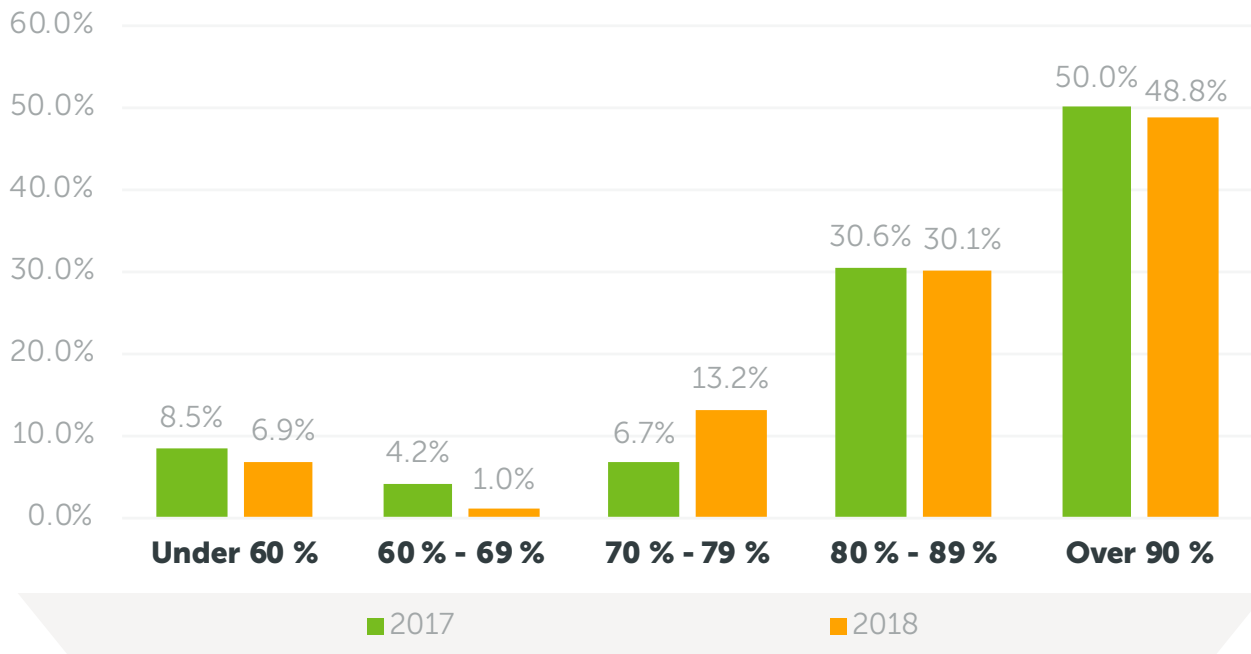


With almost half of workspaces being over 90% occupied, the German market remain the industry leader in continental Europe, followed closely by the Swedish. Furthermore, nearly 30% of providers expect even better results in terms of occupancy. The same refers to profitability forecasts based on the already achieved prices.

Success is in the air, and more than 70% of the respondents believe the future holds long-term prosperity.

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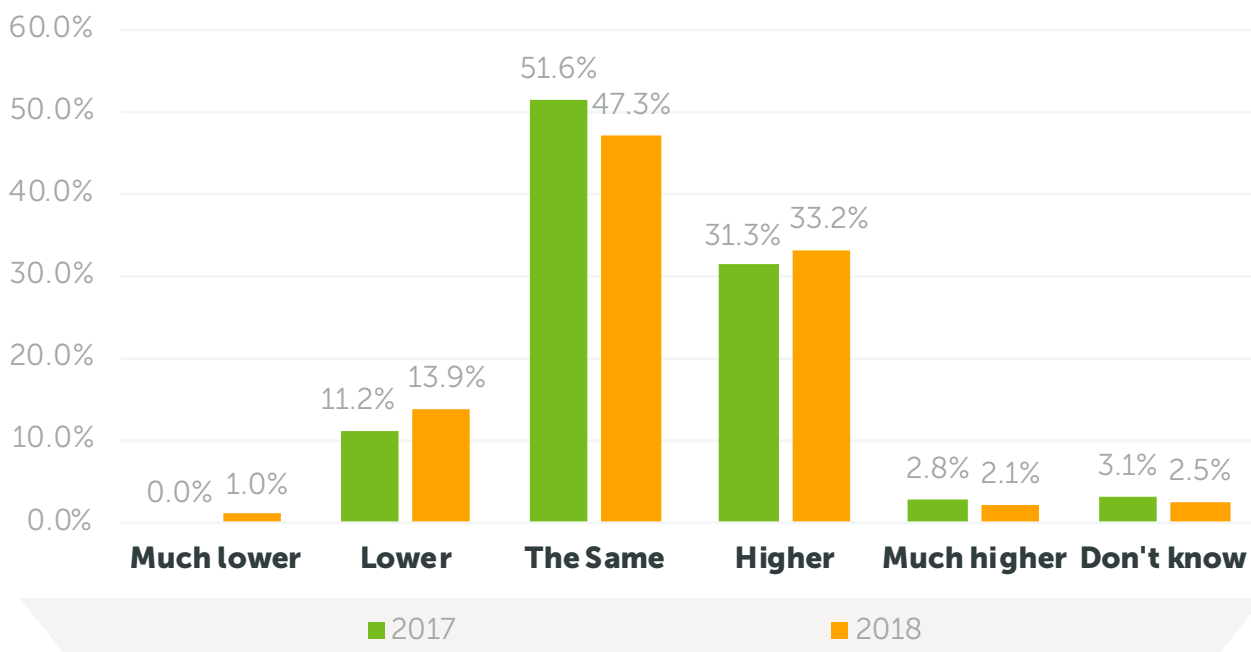
Average office occupancy



Very high occupancy achieved by almost **80%** providers is a trend continued from 2016. About **half** of all offices are close to fully occupied, which is **far above average** compared to the rest of Europe. The two lower occupancy bands have also **diminished slightly**.

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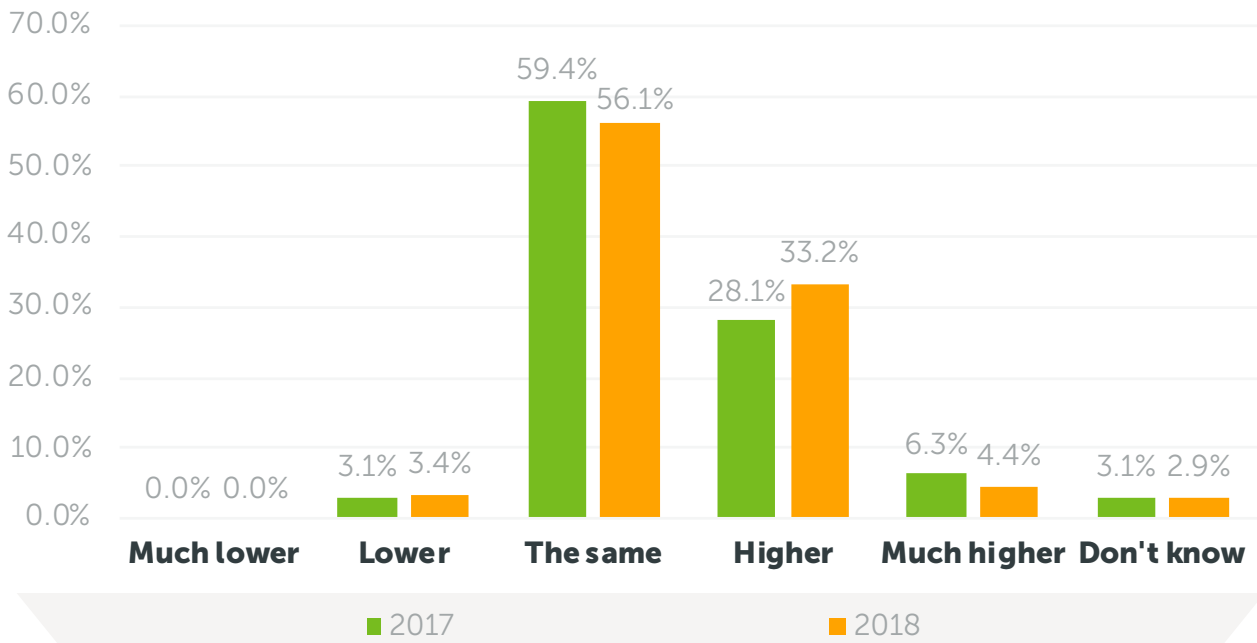
Occupancy compared to last year



Predictably, the German market is currently developing at a **steady** pace. Just **under half** of all respondents have reported the **same** occupancy as last year, while more than **30%** have experienced **growth**. The year-on-year **increase** in those having fewer tenants is only **2.7%-points** against 2017.

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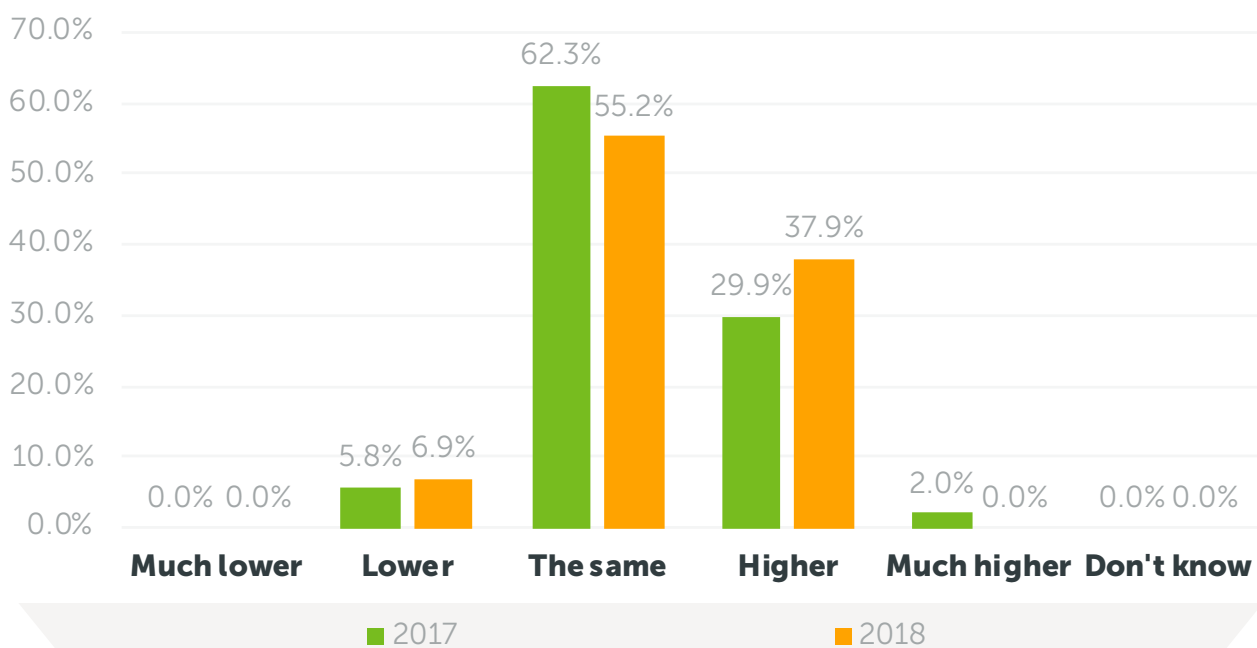
Occupancy expectation in 6 months



The 2018 data **closely** resemble last year's results, with a **slight shift** from the same to **higher** occupancy expectations. However, it is getting more difficult for providers to further **improve** their occupancy due to natural limits. Supposedly, it could lead to **increased** prices.

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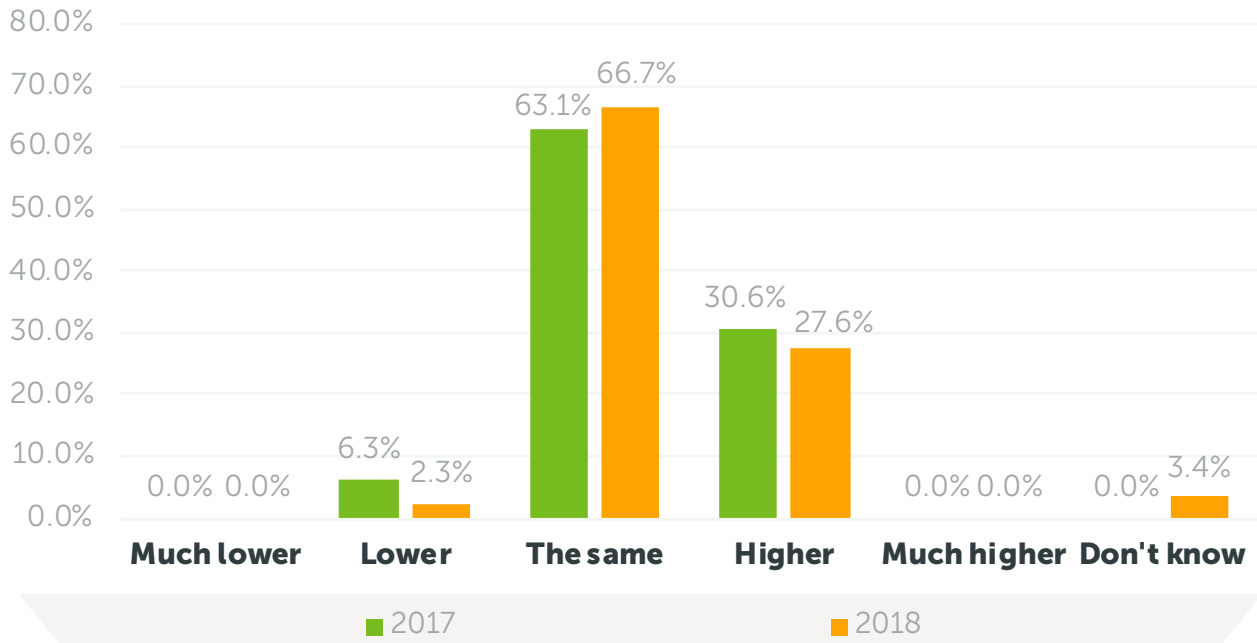
Achieved prices for office contracts or workstations compared to last year



Many workspaces have very high occupancy, so it is not surprising that there is **8%-points growth** in the **higher** prices bracket, although **over half** of providers have the **same** pricing policy.

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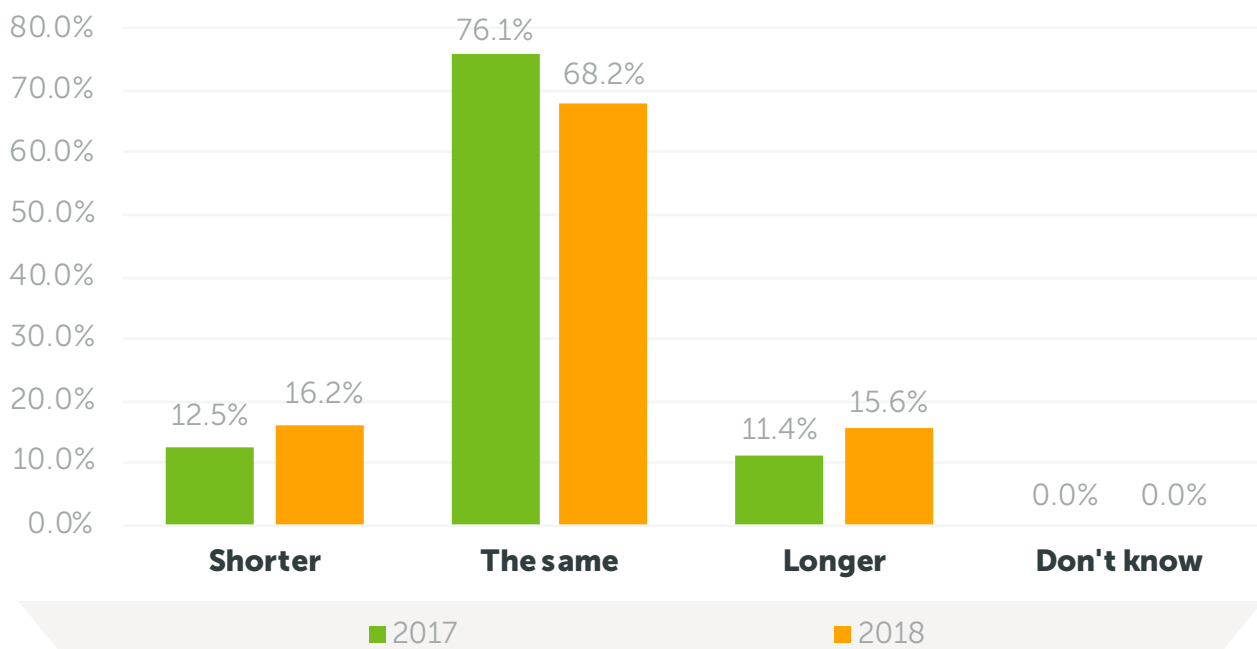
Expected price level in 6 months



Two out of three respondents believe they will be able to charge the **same** price for their services in 6 months from now. In line with the occupancy results, **27.6%** are confident that they will have **increased** rates in the near future compared to the current level.

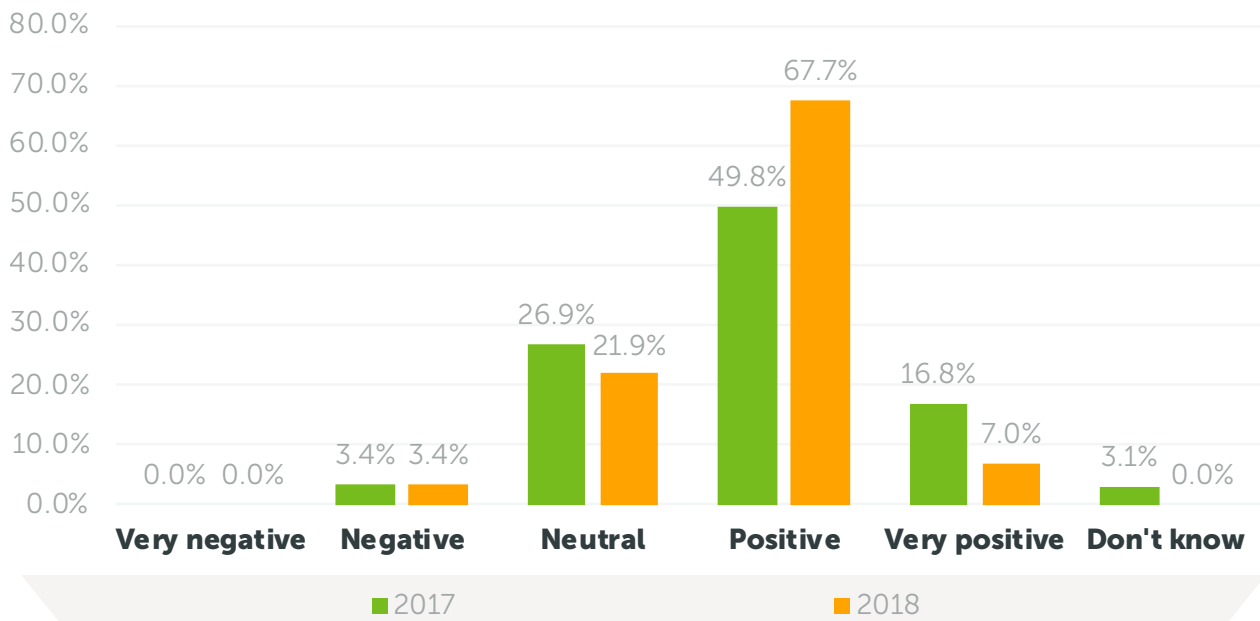
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Initial contract length compared to last year



Almost **two-thirds** of providers have signed contracts of the **same** length as before. It appears that current standards are suitable for tenants, too. The rest are divided into two **almost equal** groups with **shorter** and **longer** contracts - a slight **increase** against 2017.

General outlook



This year's **growth** in positive attitudes can be attributed to the **impressive** market results of the previous periods. **One-fifth** of all providers are **neutral** in their estimates of the industry prospects, whereas the number of very optimistic has **fallen** by **9.8%-points**.



Italy

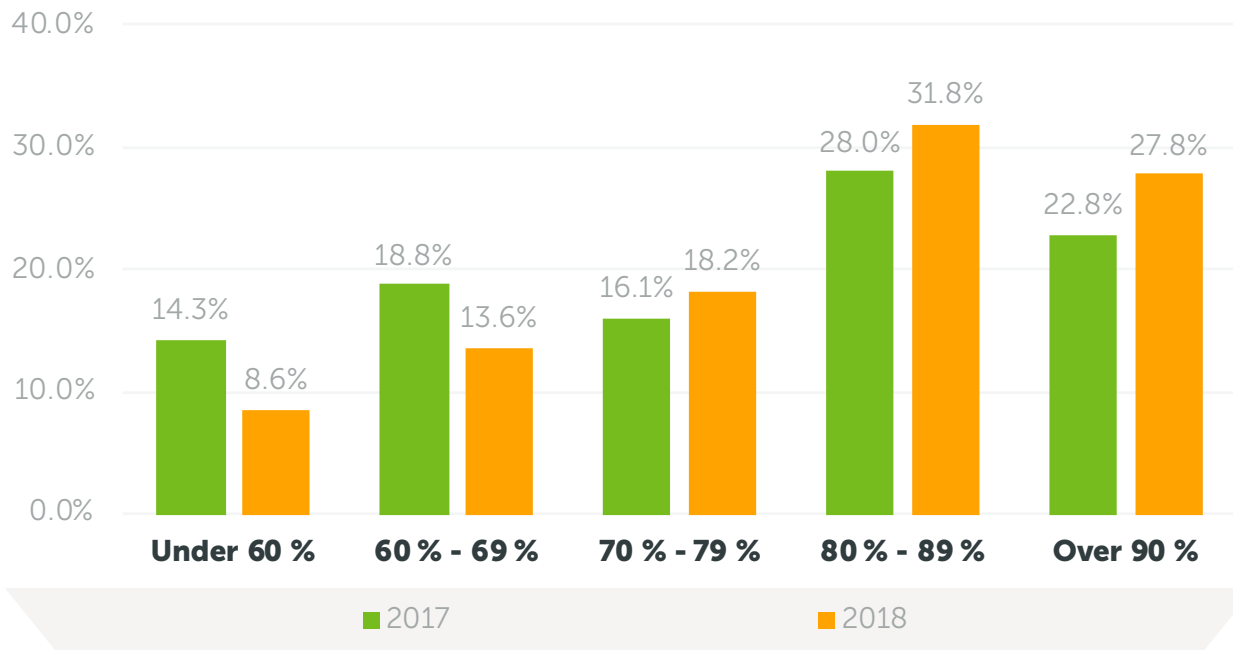
Like in other European countries, the average office occupancy has noticeably grown in Italy. With overall year-on-year stability in prices, we can observe a substantial rise in shorter contracts.

Obviously, smaller companies and startups prefer short-term commitment to adjust workspaces to changing business needs quickly.



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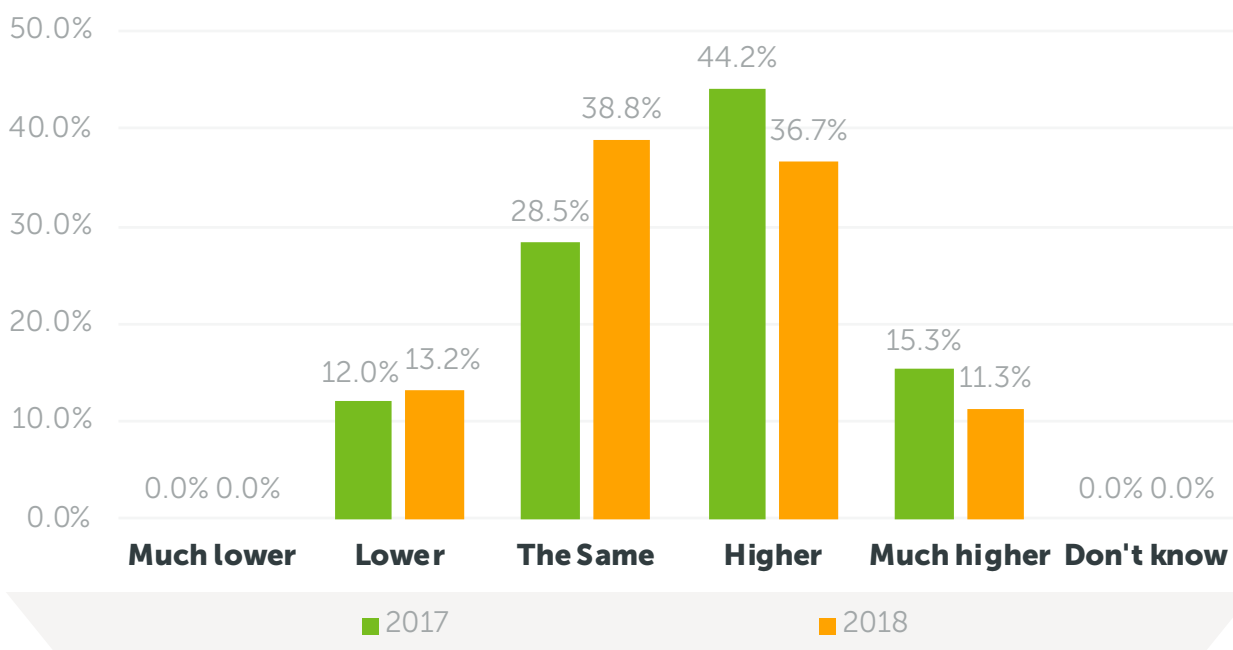
Average office occupancy



The market is **picking up** in Italy - the conclusion drawn on the basis of improvement in the two highest occupancy bands, with a **simultaneous decline** in the offices which are **less than 69%** occupied.

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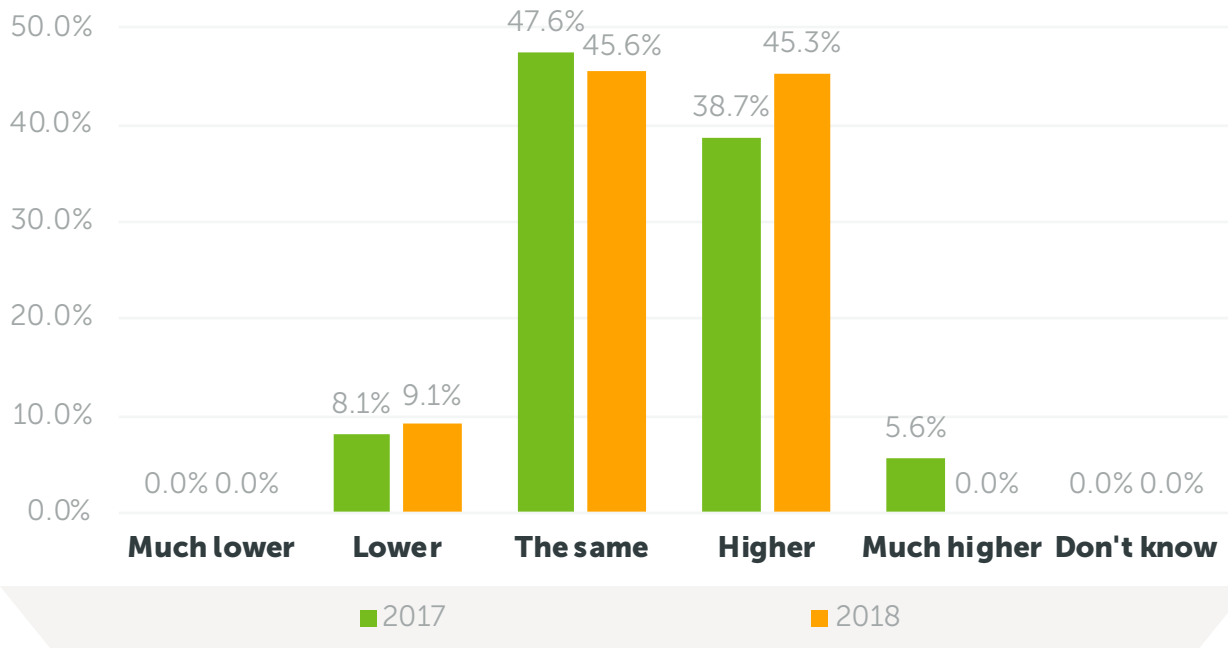
Occupancy compared to last year



There is a **negative** skew in the data compared to 2017: **fewer** respondents have reported **higher** or **much higher** occupancy with a **natural increase** in the same occupancy bracket. It suggests **market stability** and **good growth** prospects, especially combined with the results shown above.

3

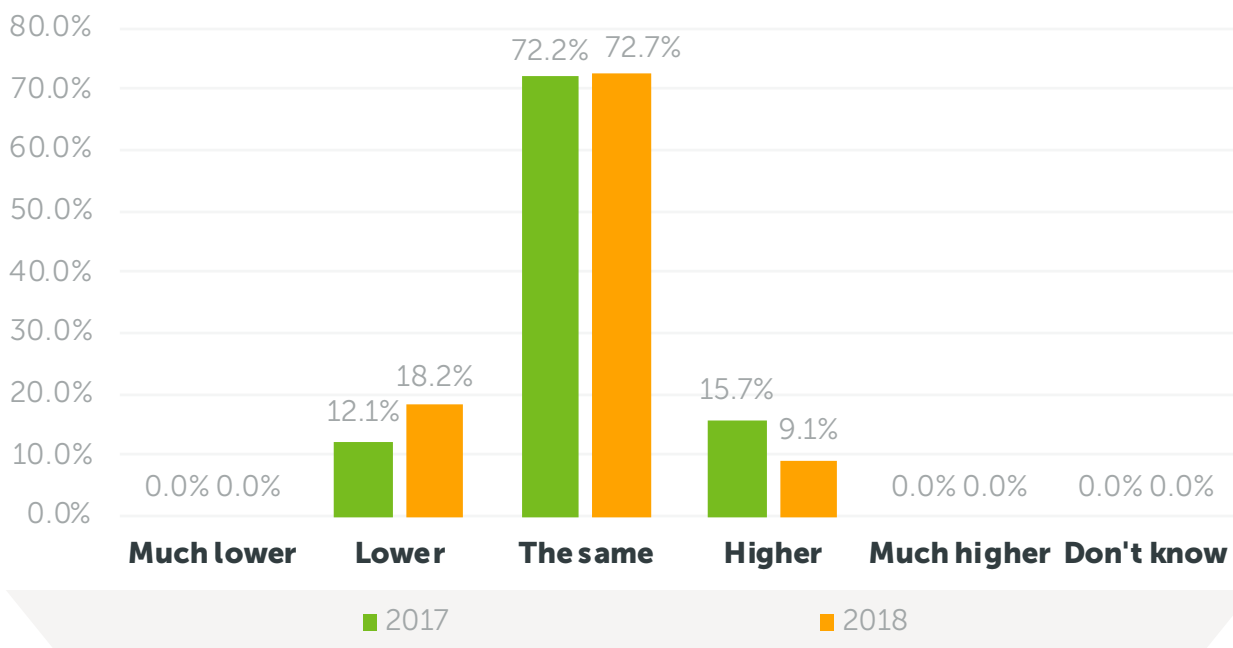
Occupancy expectation in 6 months



Interestingly, the proportions of providers expecting the **same** or **higher** occupancy have **equaled** this year. The fact that only **one-tenth** of the respondents expect occupancy to drop in six months is another proof of the **healthy** Italian market.

4

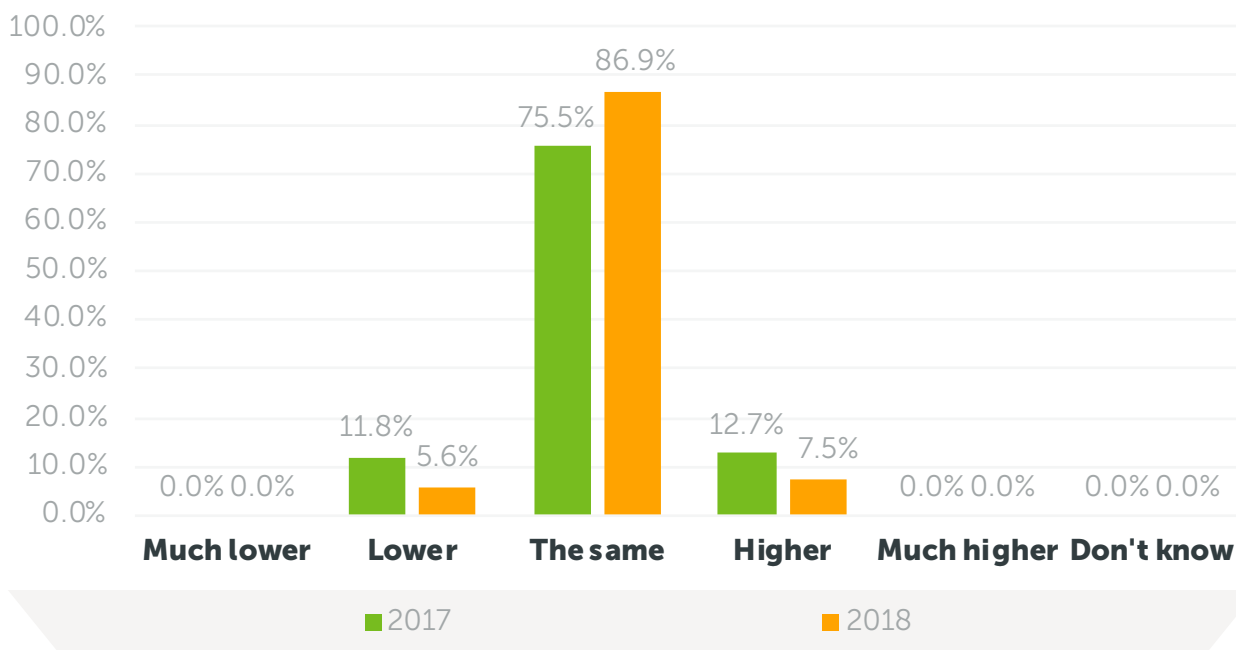
Achieved prices for office contracts or workstations compared to last year



For the third consecutive year, there have **not** been any large fluctuations in prices. About **two-thirds** of providers have the same rates as in 2017. It seems that many flexible workspaces **attract** loyal clients, for whom they do not change their pricing policy.

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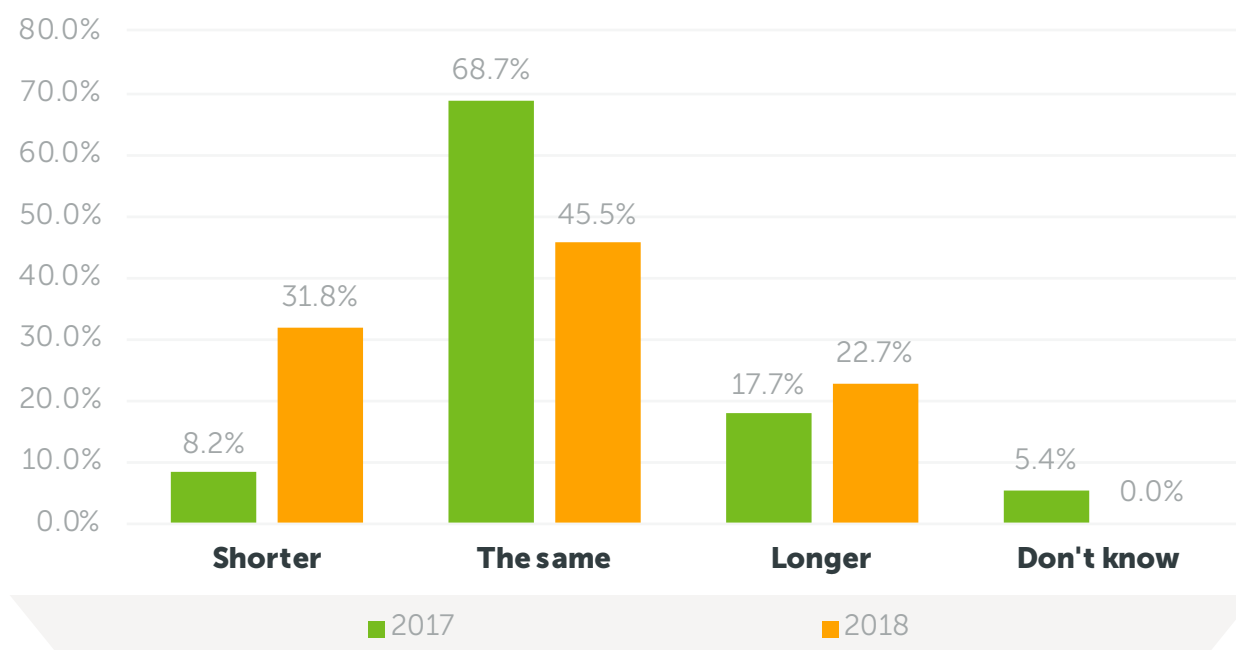
Expected price level in 6 months



The data naturally follow those from the previous graph: an **overwhelming majority** of providers **do not** plan to **increase** prices in the next six months. Predictably, none expect the rates to change drastically.

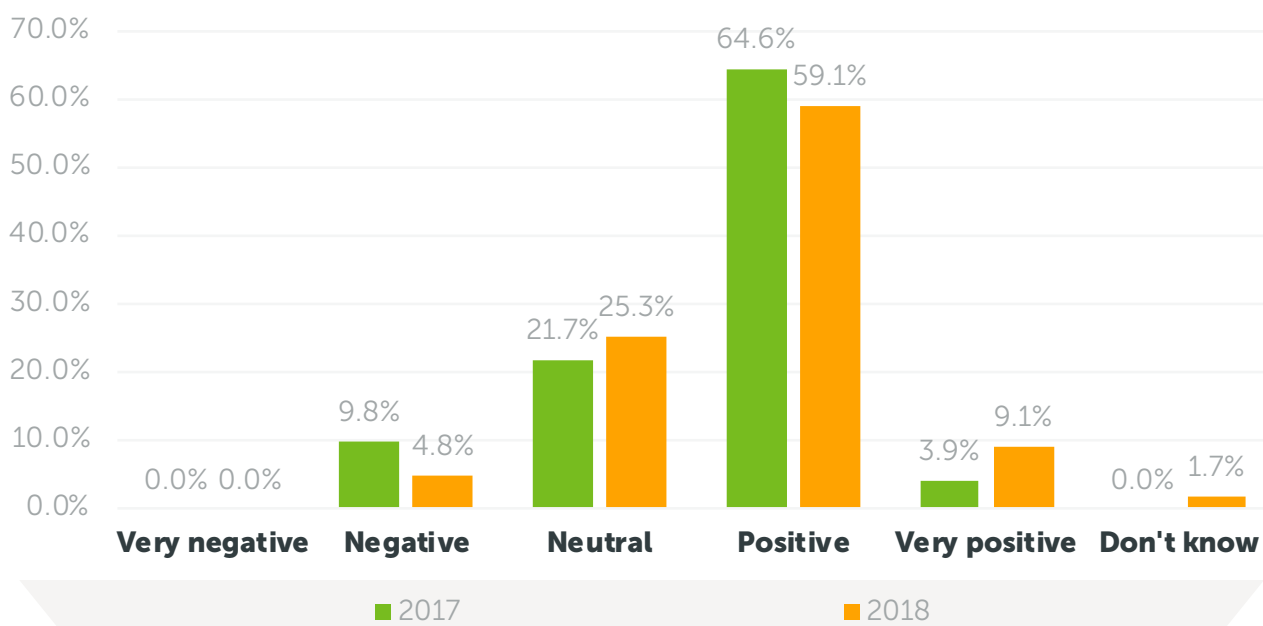
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Initial contract length compared to last year



This year, there is a **substantial rise** in shorter contracts - **23.6%-points**, which might be explained by more tenants seeking flexibility. About **one-fifth** of all providers have reported longer contracts.

General outlook



It is not surprising that the achieved results encourage **optimism** in **over 50%** of providers. There is also a **5.2%-points rise** in the **very positive** attitude band, whereas **a quarter** of all respondents are **neutral**.



The Netherlands

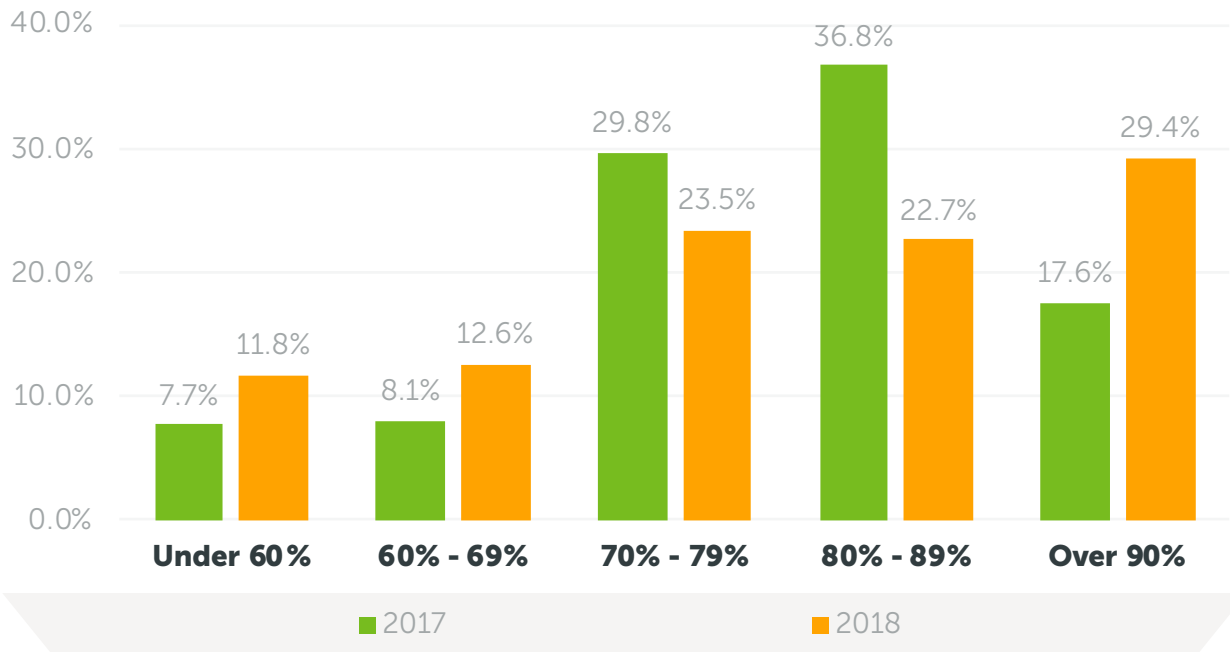
The double amount of providers with a positive outlook and no negativity characterizes the Dutch market very well this year. Over half of all respondents have more tenants than in 2017. However, we can see a growing disparity between flexible workspaces with the lowest and the highest occupancy.

New workspaces might need more time to win clients and improve their performance.



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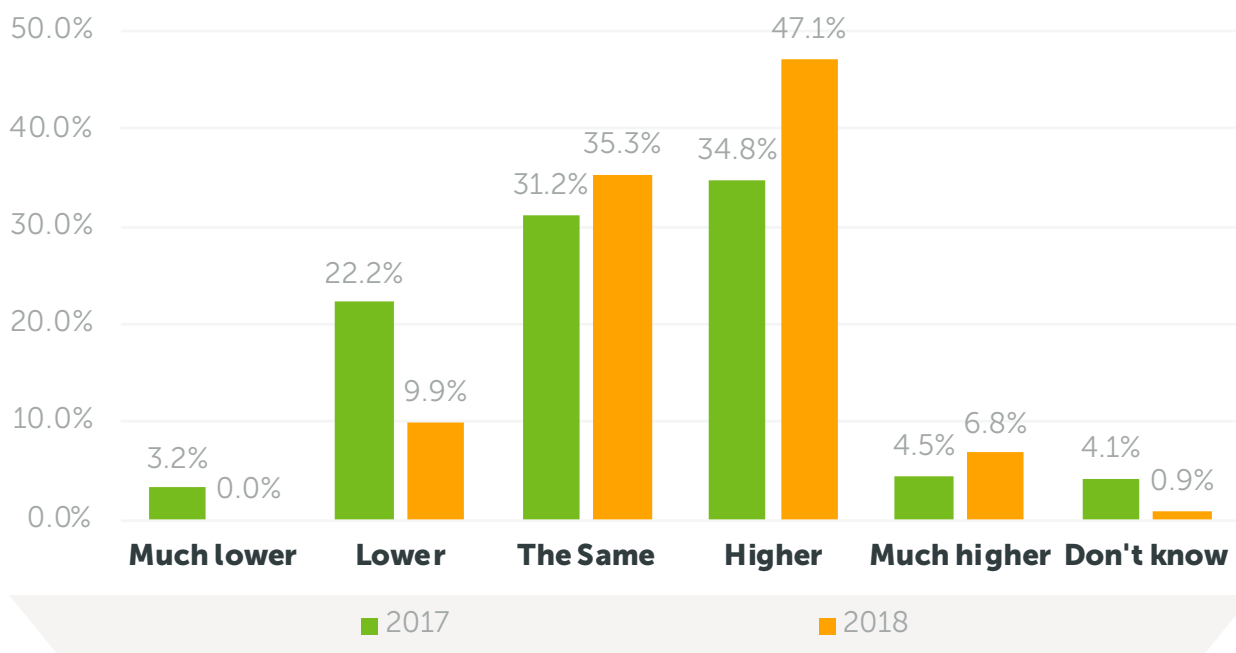
Average office occupancy



The highest occupancy bracket has **increased by 11.8%-points** this year. However, the number of offices with lower occupancy has also **grown**, which shows that the competitive gap has widened.

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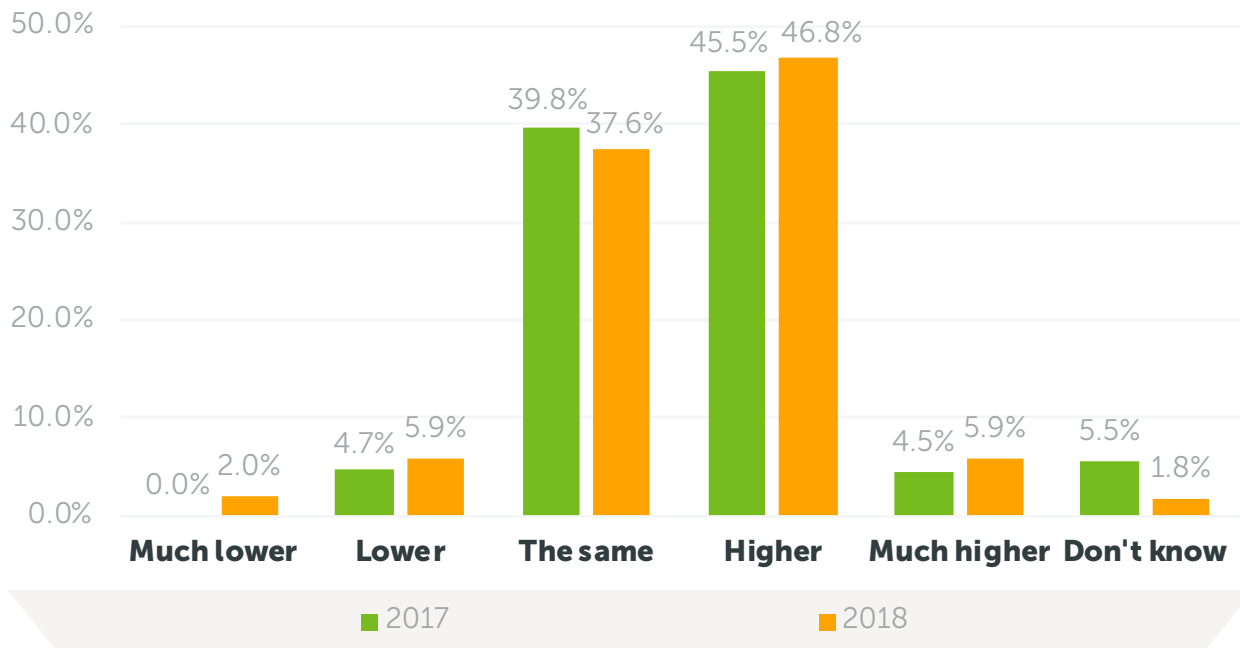
Occupancy compared to last year



There is a distinct upsurge in the popularity of flexible workspaces in this market as almost **half** of providers have **more** tenants than last year. Furthermore, the graph shows a twofold **decrease** in those with lower occupancy.

3

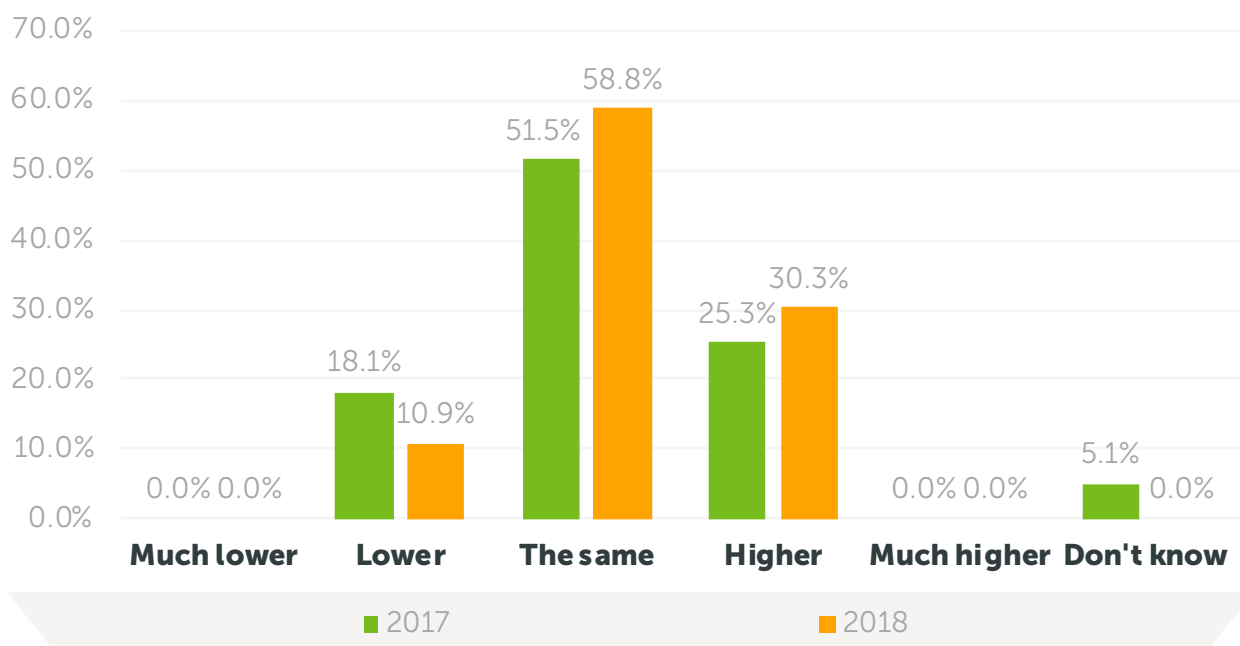
Occupancy expectation in 6 months



Almost **half** of the respondents have expressed confidence about the occupancy **growth** in six months, which is virtually **unchanged** from 2017. It resembles the situation in Italy and Belgium and follows the general European trend.

4

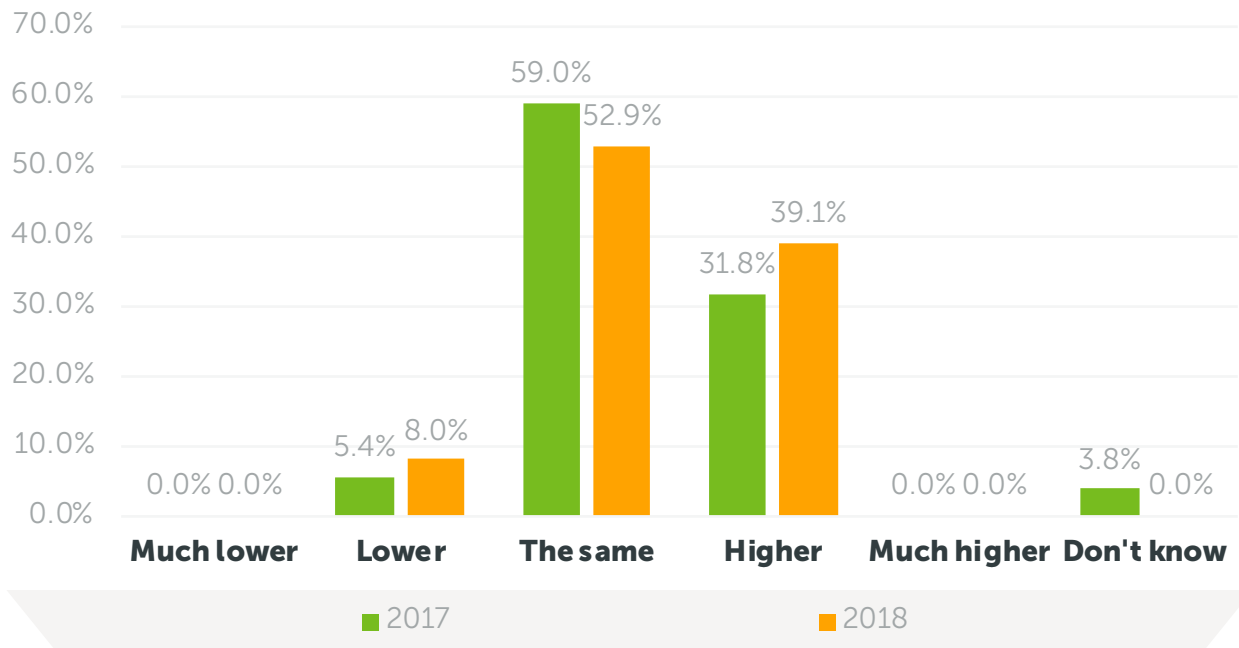
Achieved prices for office contracts or workstations compared to last year



This graph convincingly demonstrates a **shift** from **lower** towards the **same** and **higher** prices compared to 2017. Unsurprisingly, **none** of the respondents have reported **much lower** or **much higher** rates for the third consecutive year.

5

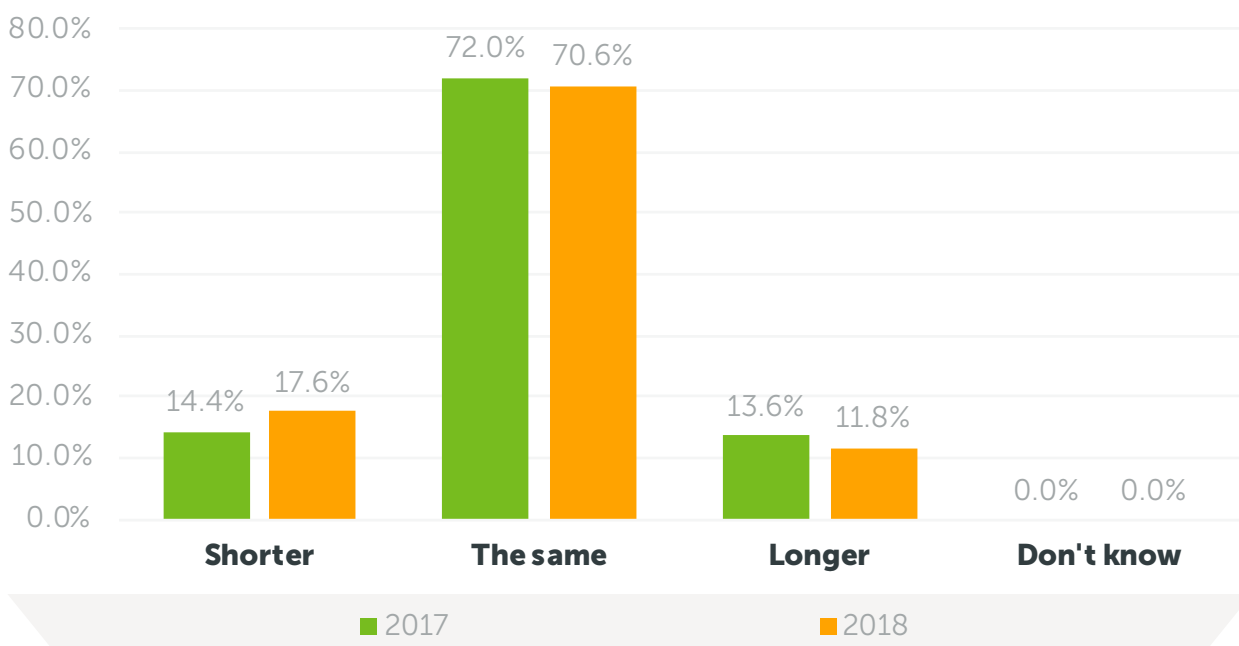
Expected price level in 6 months



Overall, price expectations roughly coincide with the achieved level, like in other European countries. The existing market success is predicted to bring **higher** profit to **39.1%** of providers.

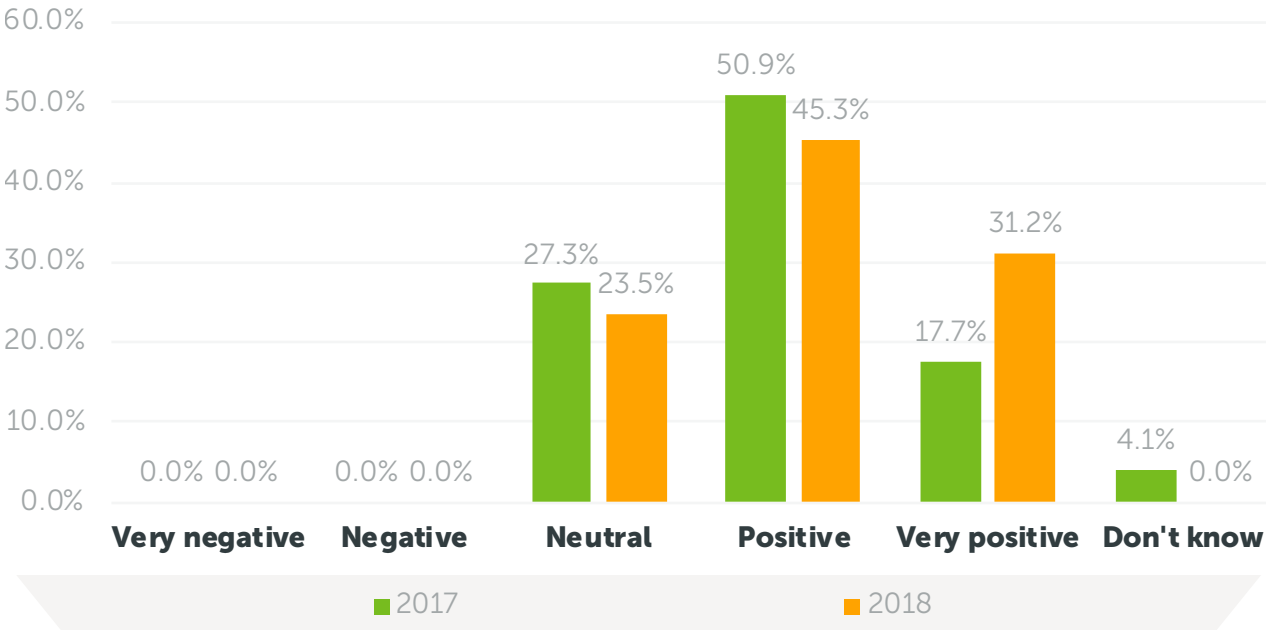
6

Initial contract length compared to last year



Most flexible workspaces have signed contracts for the same period as last year. However, there is a **small rise** in the shorter contracts. Presumably, this trend will continue like in Italy as flexibility is valued.

General outlook



The optimism is well-grounded on the Dutch market. The almost **doubling** of providers who believe in the industry’s excellent prospects and the absence of **negative** sentiments are very inspiring.



Spain

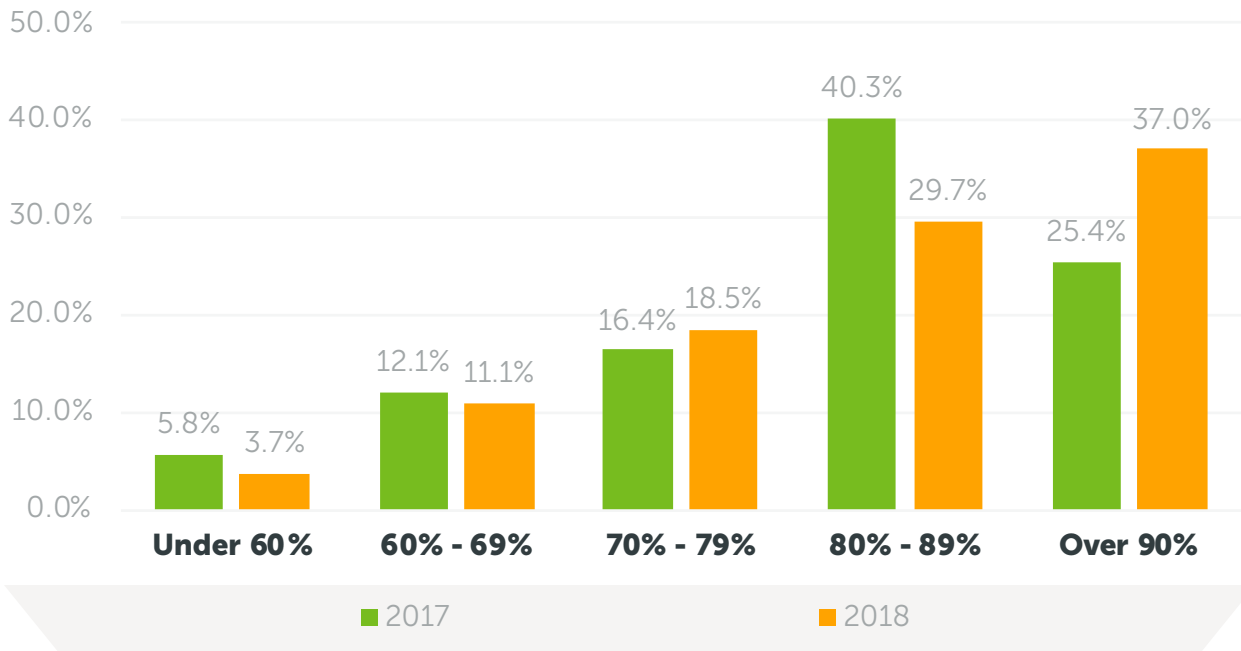
This year the market in Spain is following European trends: an increased number of workspaces with the highest occupancy, better results against last year, and high expectations.

The prices and the contract length have remained almost unchanged, while more providers believe the industry has excellent growth prospects.



1

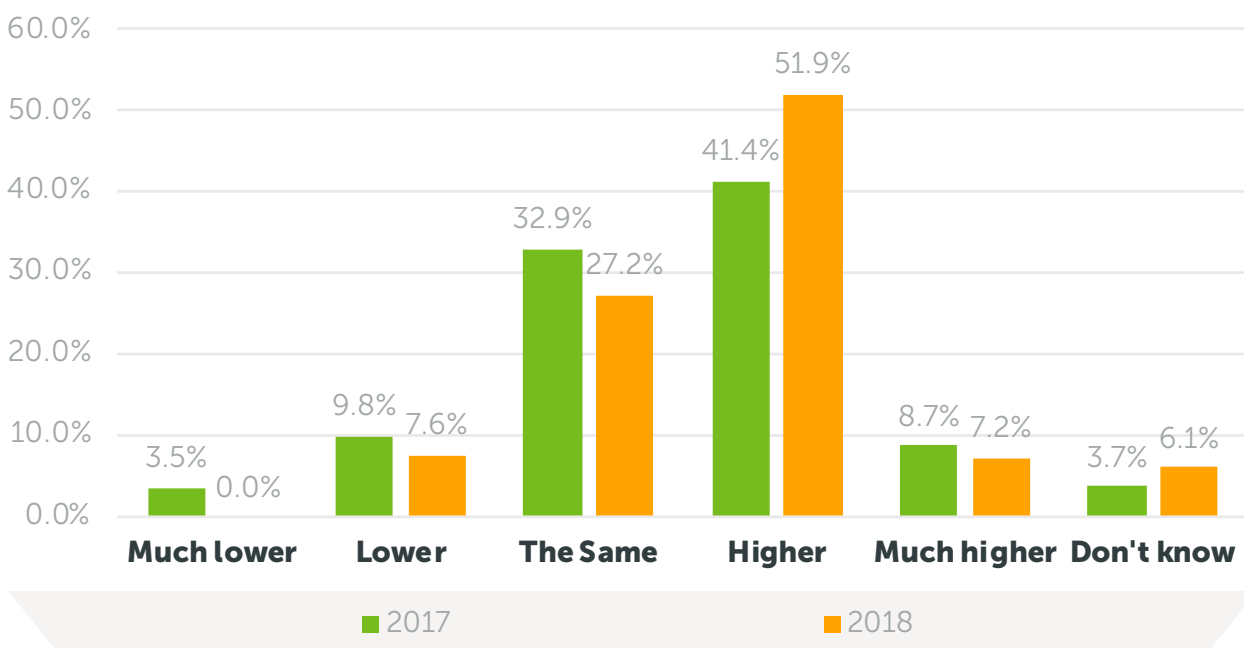
Average office occupancy



It seems that European occupancy trends have reached the Spanish market this year: the number of workplaces which are more than **90%** occupied has **increased** by **11.6%-points**. The other bands look **positive**, too.

2

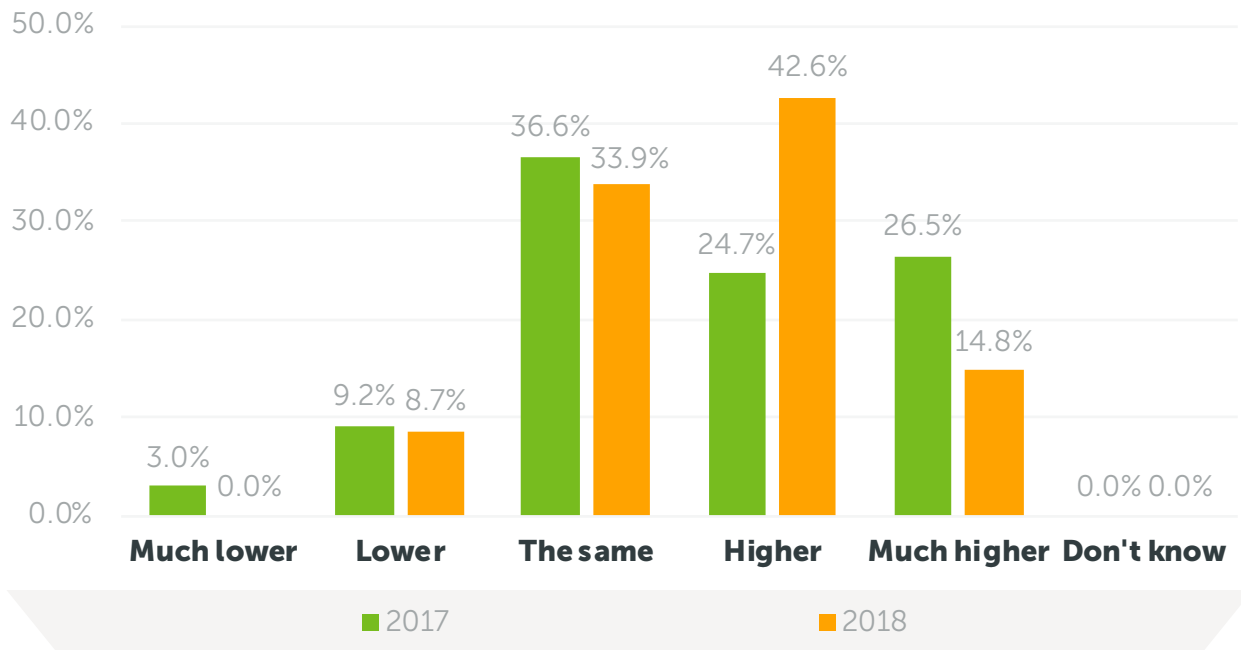
Occupancy compared to last year



Again, we can see a **growing** tendency for providers to have **higher** year-on-year occupancy, especially in big cities, as a majority of respondents are from Barcelona and Madrid. This year, a **smaller** proportion of offices **maintain** the status quo or have **fewer** tenants.

3

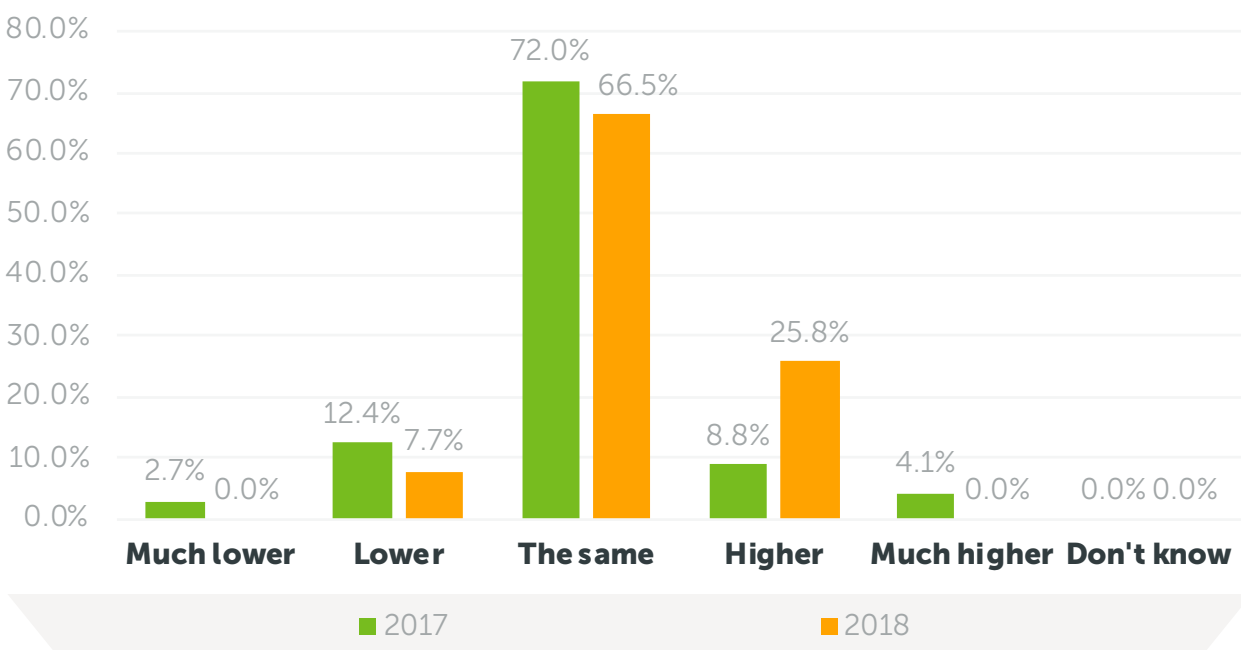
Occupancy expectation in 6 months



In 2018, **fewer** respondents believe that occupancy will soar in 6 months - an **11.7%-points decrease** since last year. However, as the other bands are almost **unchanged**, they have only **slightly lowered** their expectations. Now over **40%** of all providers aspire to have more tenants soon.

4

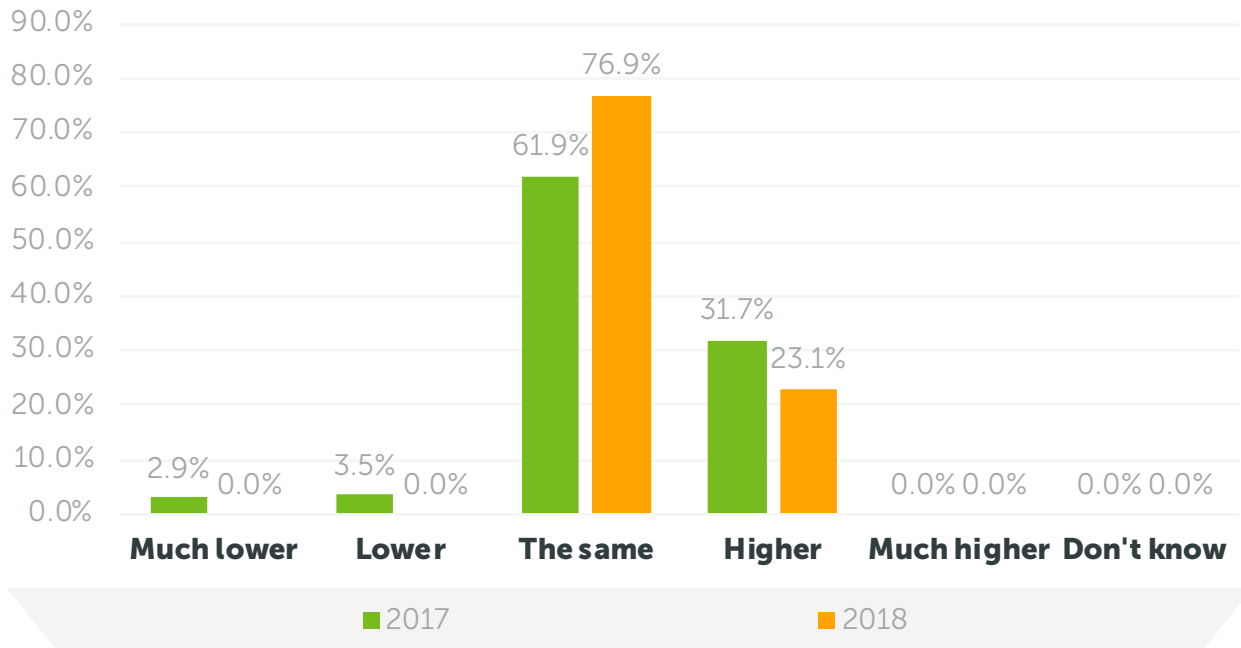
Achieved prices for office contracts or workstations compared to last year



With the overall market stability and **over half** of providers having higher occupancy, it is not surprising that **a quarter** of them - **17%-points** more than last year - have **increased** prices. Most flexible workspaces have the **same** rental rates.

5

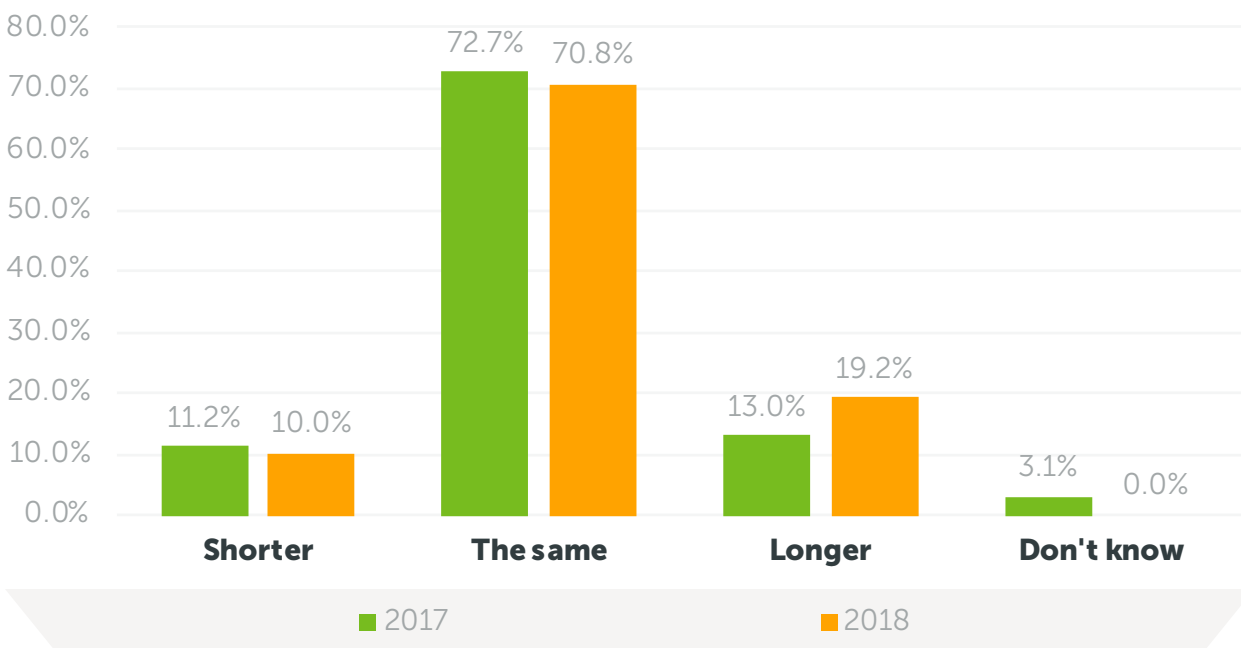
Expected price level in 6 months



As we can see in the previous graphs, the demand for flexible workspaces is **growing**. Therefore, **none** of the respondents plan to lower prices in the near future to stay competitive, and most will have the **same** rates as before.

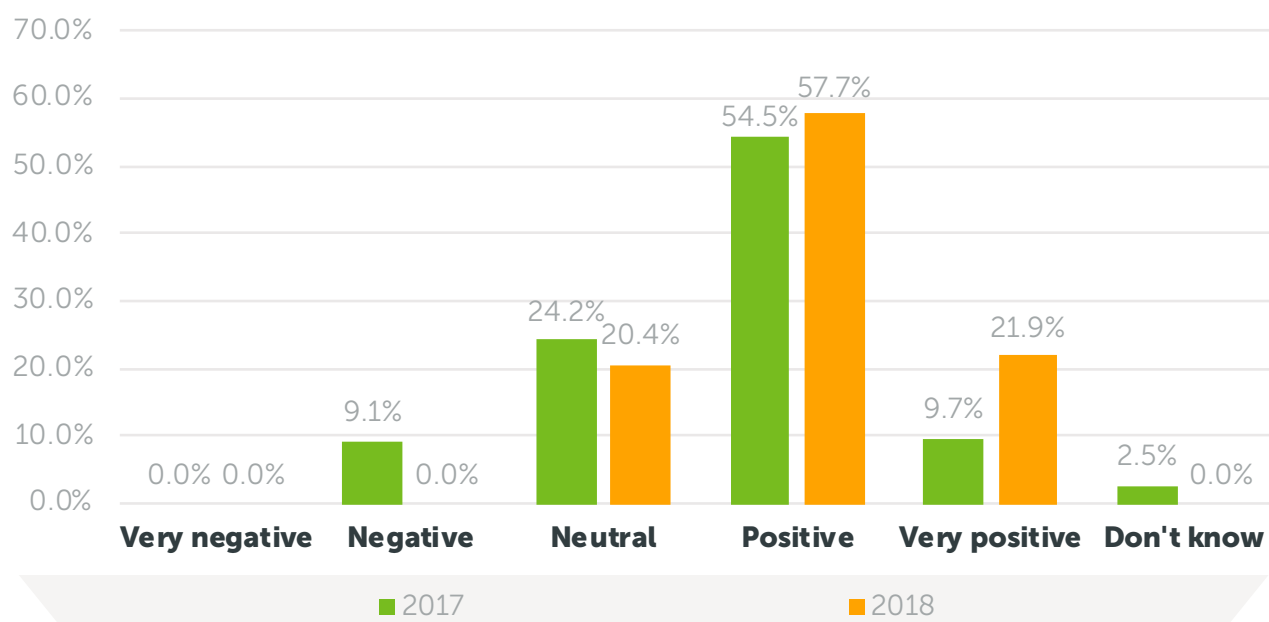
6

Initial contract length compared to last year



Like in Denmark and the Netherlands, the overwhelming majority of flexible workspaces have the **same** length of contracts as last year. Almost **one-fifth** of all respondents have rented out their workspaces for a longer period.

General outlook



Generally, the market is **healthy** in Spain: there are **no negative** sentiments this year, whereas the number of providers who believe the industry has very bright prospects has **doubled**.



Sweden

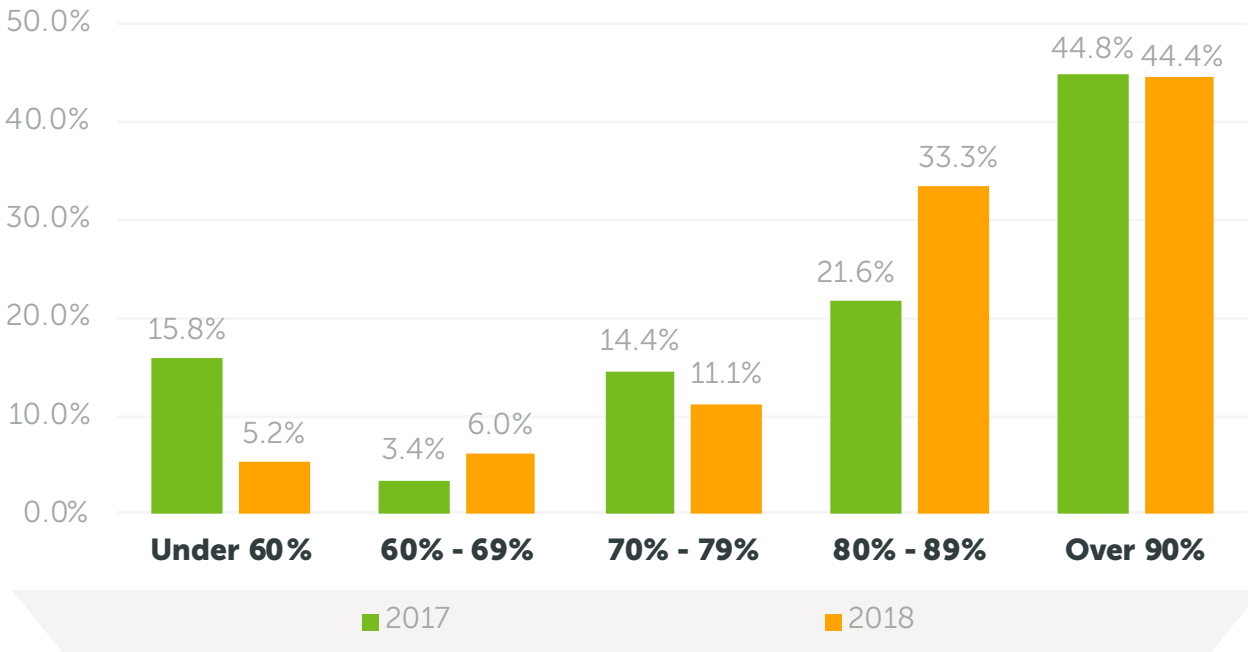
This year, the Swedish flexible workspace industry lives up to its reputation as one of the liveliest and the most competitive.

Unlike in the rest of Europe, there is a downward trend in price expectations. Fewer providers plan to increase prices as they are already high in such a booming market.



1

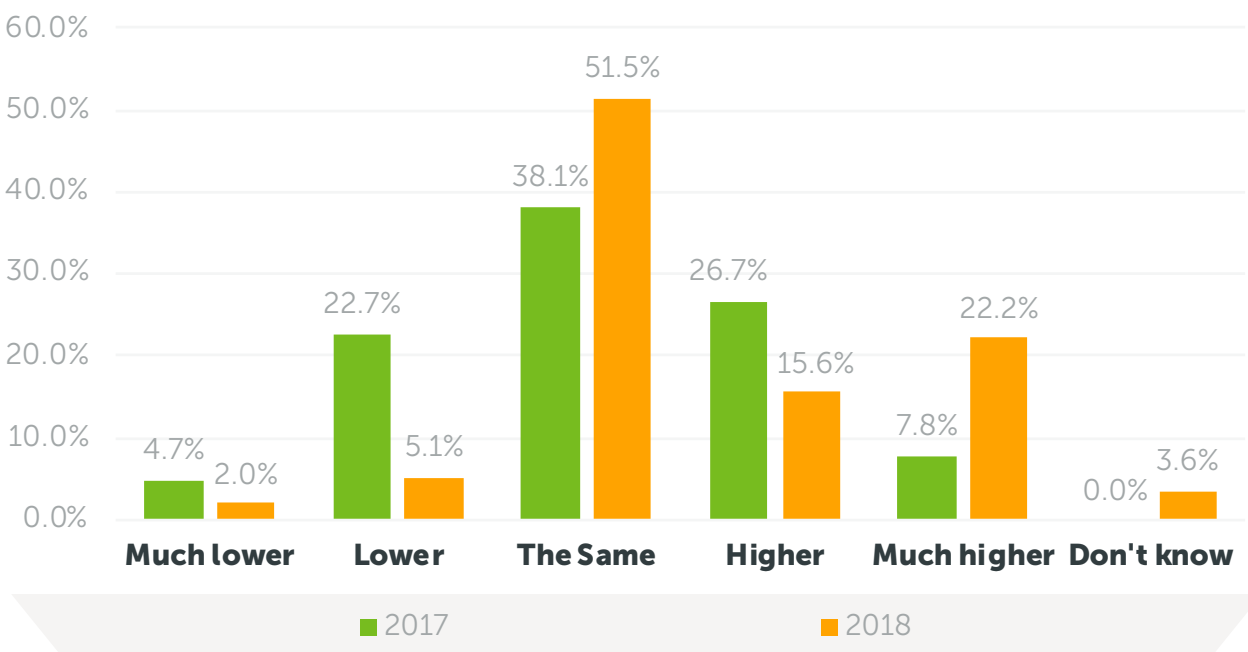
Average office occupancy



The **increased** popularity of flexible workspaces in Sweden can be observed in the graph above. The biggest **growth** is in the **80-89%** occupancy band - **11.7%-points**, while there are threefold **fewer** offices with the lowest occupancy.

2

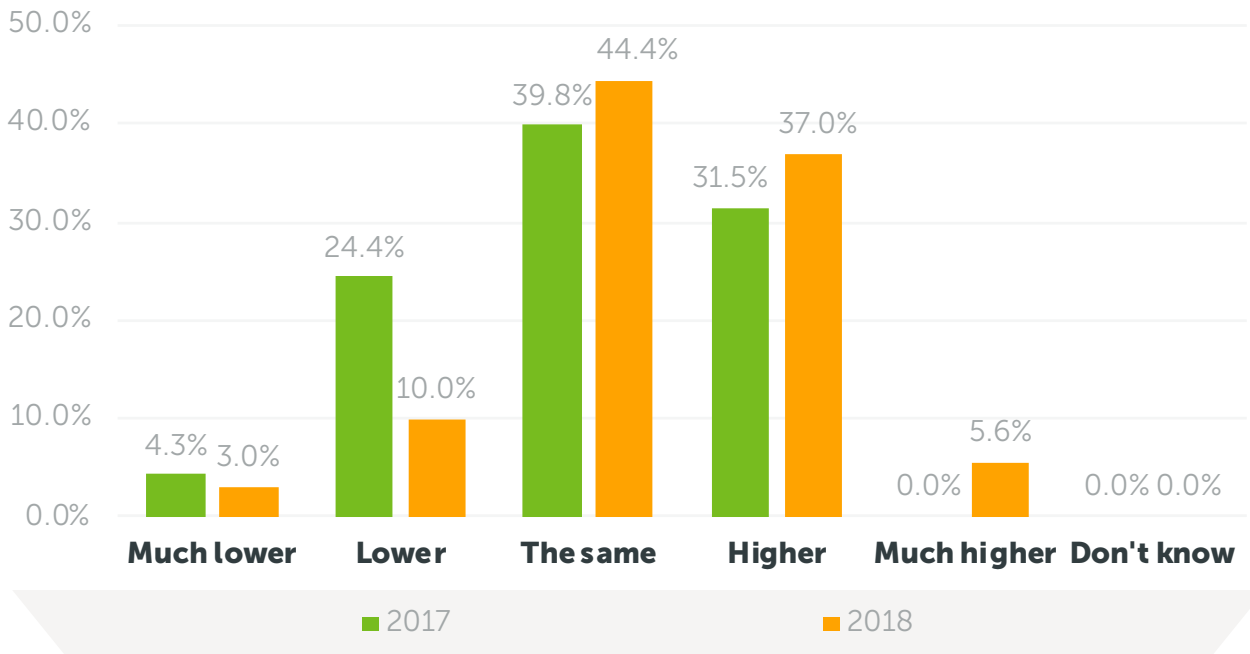
Occupancy compared to last year



2018 has been **no** different regarding occupancy to more than **half** of respondents, and only **7.1%** performed worse than last year - **20.3%-points decrease**, which is heartening.

3

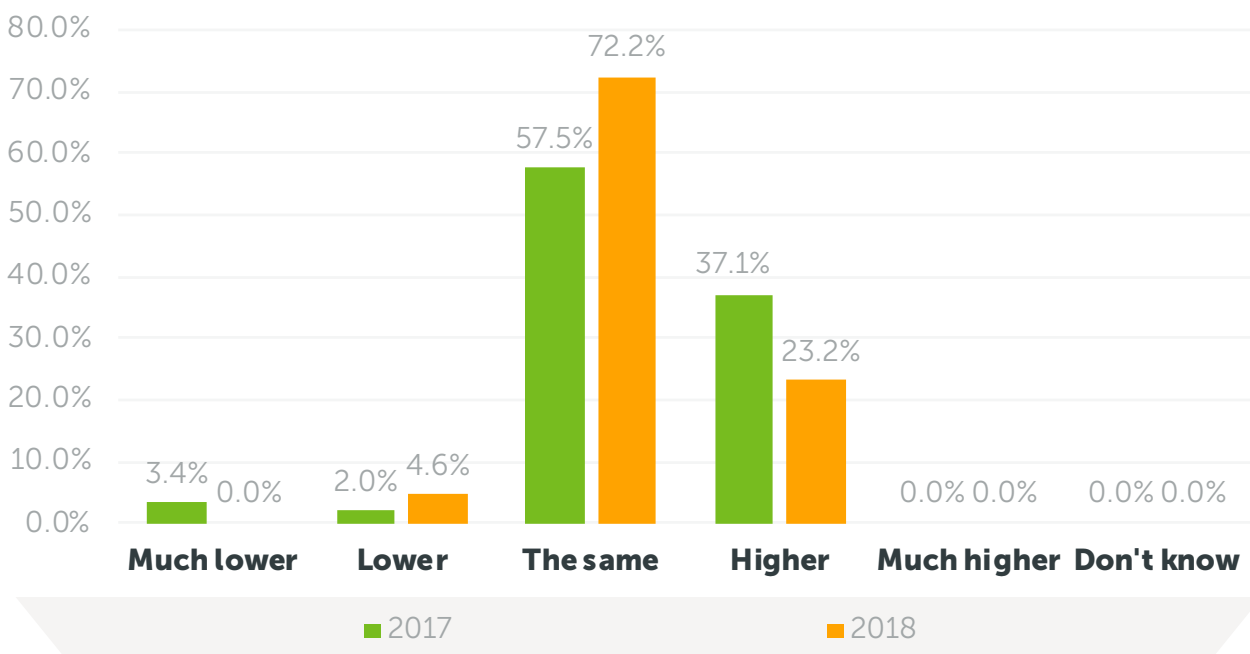
Occupancy expectation in 6 months



2018 has brought **heightened expectations** to Swedish providers - more than **40%** believe they will have **more** tenants, although almost the **same** proportion predicts **no changes**. There is a significant **decrease** in those awaiting worse occupancy - **15.7%-points**.

4

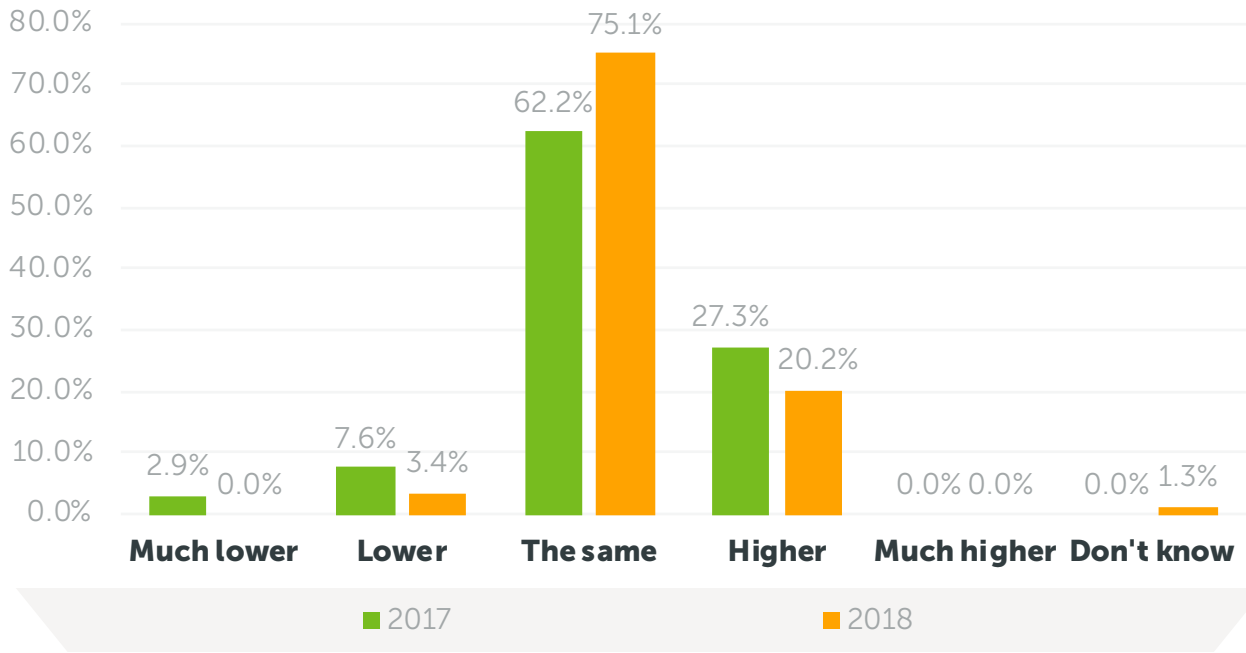
Achieved prices for office contracts or workstations compared to last year



The tendency towards higher prices has been **reducing** since 2016. **Two-thirds** of flexible workspaces having the same prices as last year, it seems the rental rates have **stabilized**. Naturally, there have not been any sharp fluctuations.

5

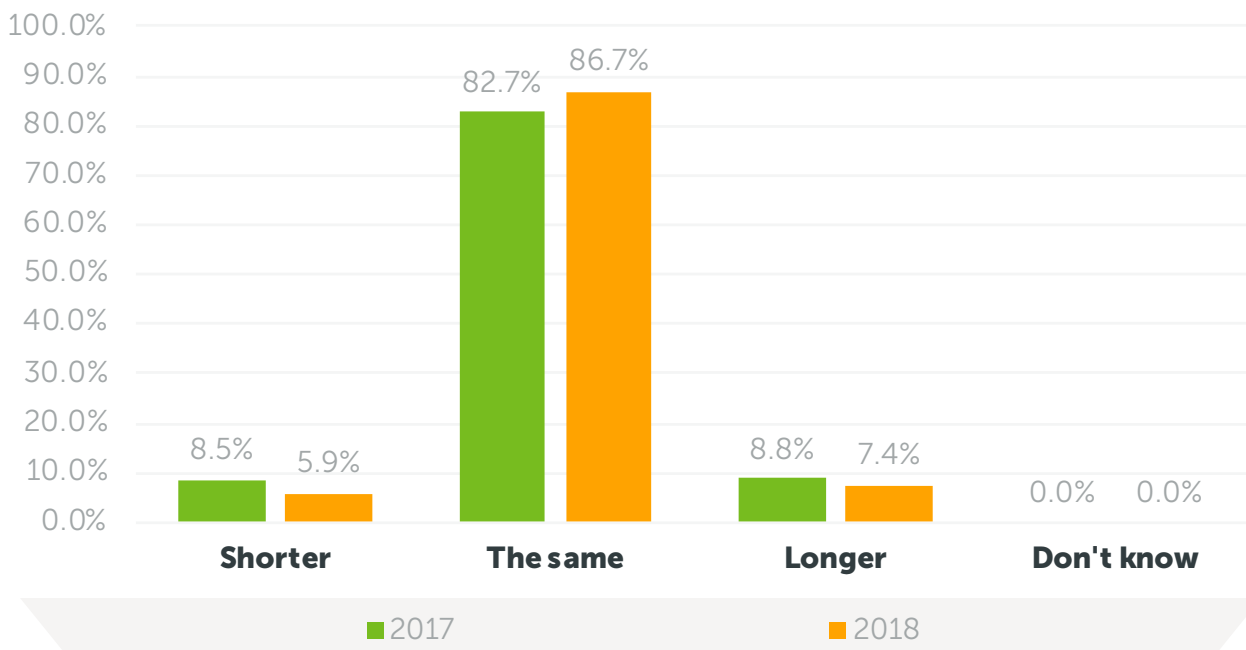
Expected price level in 6 months



It seems that pricing plans are based on the achievements in Sweden. **Two-thirds** of the providers do not expect any changes in six months. It resembles the situation in Spain, where the market is also buoyant, which ensures **high** occupancy and thus profitability.

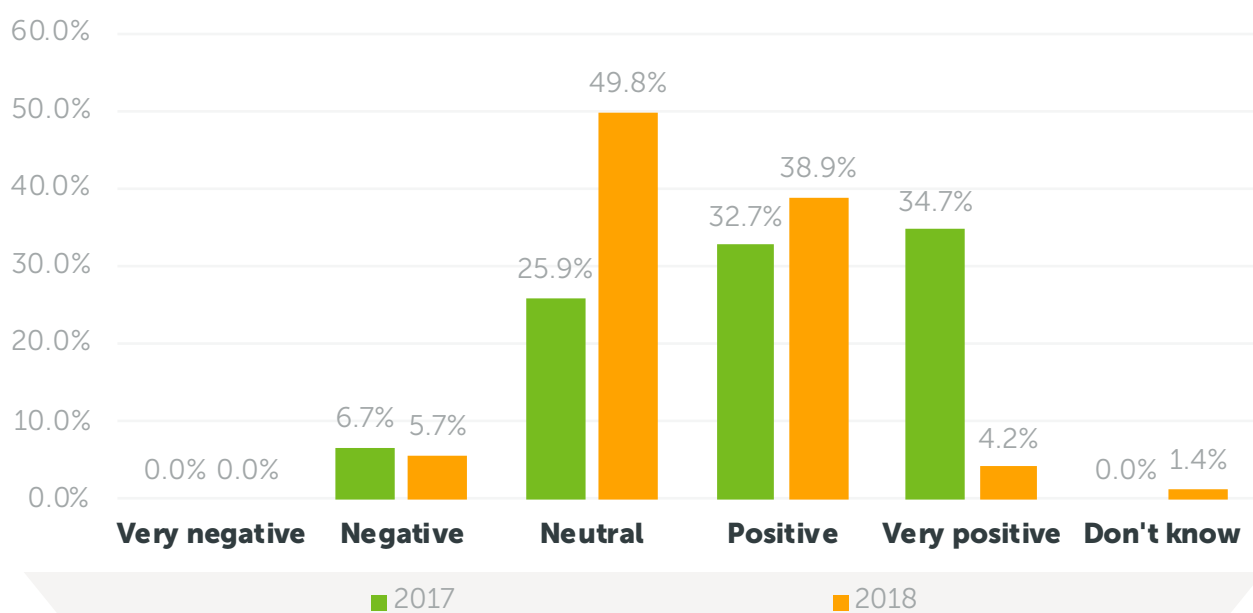
6

Initial contract length compared to last year



The overall market stability refers not only to rental rates but also to contract length. In 2018, even **more** providers have signed the **same** contracts as the year before, and only a **small** proportion of **13.3%** have experienced changes.

General outlook



The most noticeable shift is from **very positive** market sentiments towards more **neutral**. The situation is already very good for many providers. Therefore, more than **40%** expect steady development rather than explosive growth in the future, with only **5.7%** being pessimistic.



Asia

More than 50% of providers believe they will be able to reach a new level in the near future, which resembles the confident mood in Europe.

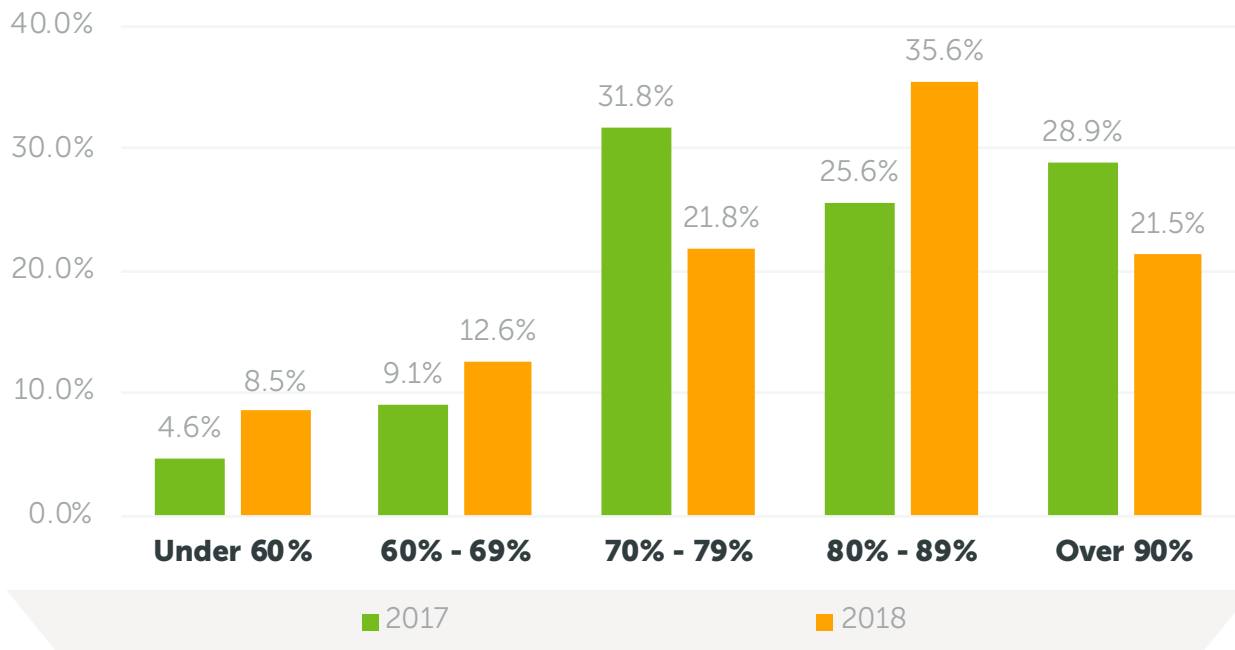
This year, providers of flexible workspaces mostly from Australia, India, China and Singapore have participated in our Industry Survey.

In 2018, we can observe some growth in the lowest occupancy band, whereas the number of almost fully occupied workspaces has fallen. Compared to last year, the occupancy situation has improved for a quarter of the respondents, but, unfortunately, worsened for virtually the same proportion. Many providers have managed to increase prices, while over 40% have maintained the status quo. However, 16.2% of all survey participants plan to change their pricing policy and reduce rental rates, which will probably lead to the retention of the existing clients and will help to attract new business tenants.

As we can see from our latest **Client Survey**, many workspaces have already put considerable effort in making their clients feel like home, providing them with first-class facilities and offering high flexibility, which is increasingly valued, especially by startups and smaller teams. Despite these outstanding achievements, there is still space for improvement. In Asia, more than 50% of providers believe they will be able to reach a new level in the near future, which resembles the confident mood in Europe. We wholeheartedly support this spirit of optimism and look forward to seeing the industry's significant expansion in the year ahead.

1

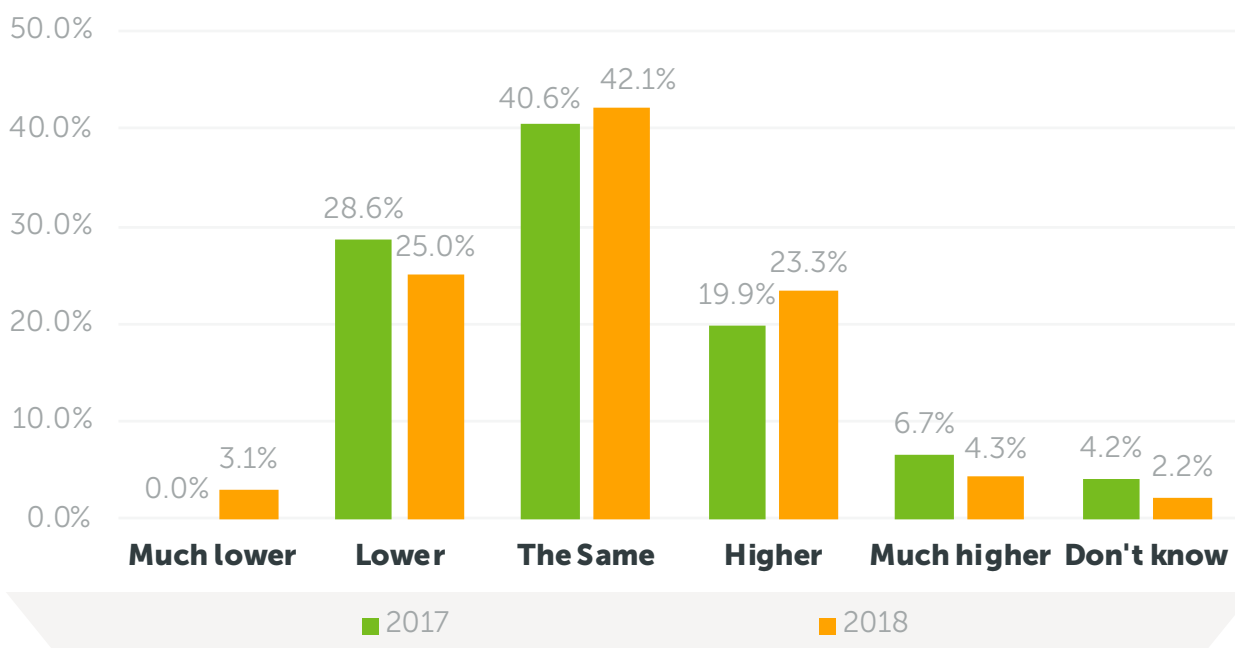
Average office occupancy



Overall, we can see a **downward** trend: some flexible workspaces which were **70-79%** occupied last year have **lost** tenants and moved to the lowest occupancy bands, and another part **improved** their competitiveness, which accounts for the **growth** of the **80-89%** band.

2

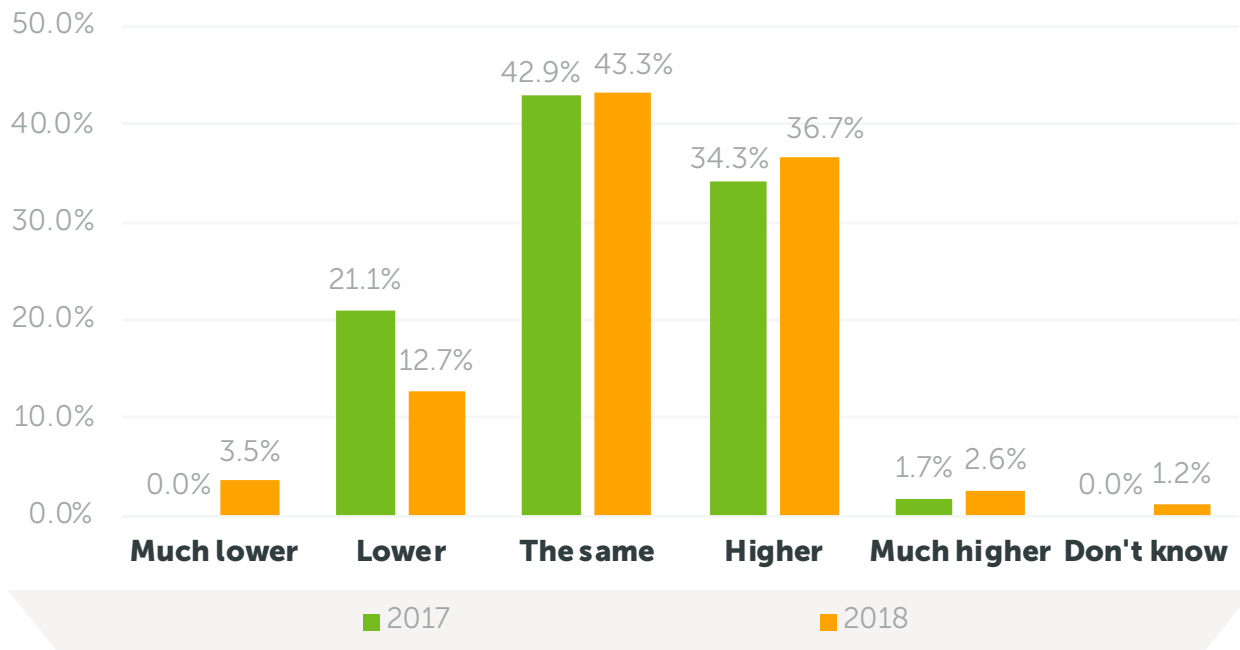
Occupancy compared to last year



There is a **small growth** in the same and higher occupancy bands - **1.5 and 3.4 %-points** respectively. Also, there is a **small** proportion of workspaces with a much lower number of tenants, which did not exist last year, with a simultaneous **decrease** in the lower band.

3

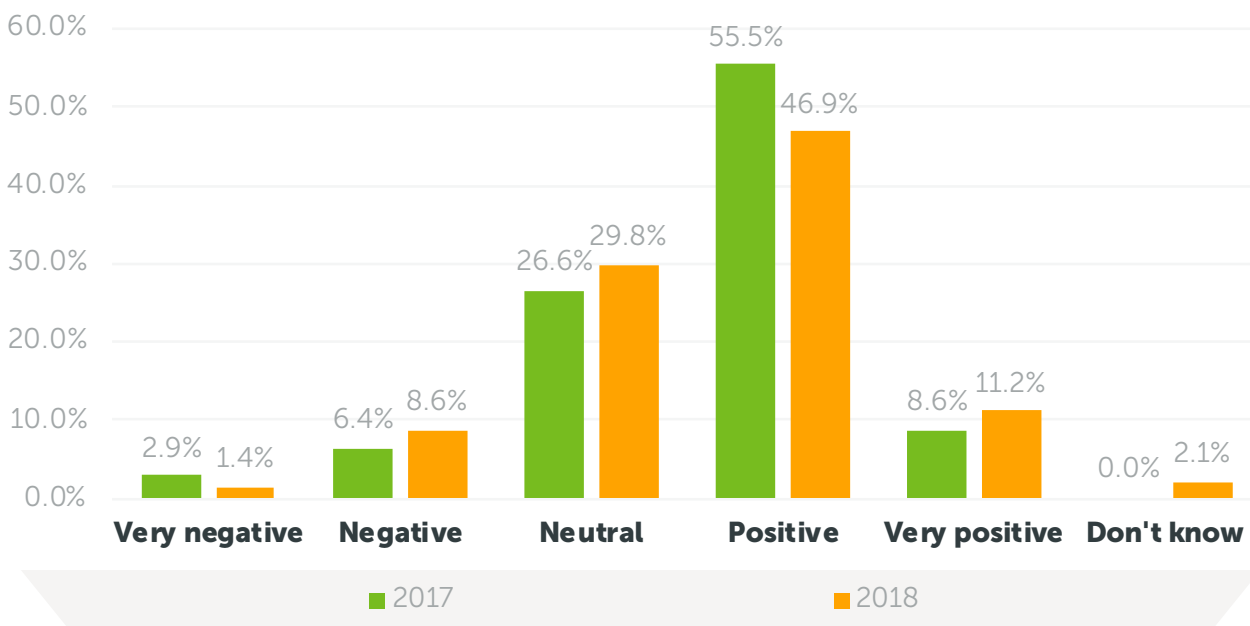
Expected price level in 6 months



Almost **40%** of all respondents hope to **increase** prices in the future, whereas **over 40%** do not intend to change their rental rates. For **16.2%** of the participants, **reducing** prices might be a way to attract new tenants.

4

General outlook for the rest of 2016



The graph shows that the proportion of providers with a **positive** outlook has **remained** almost unchanged since last year. More than **half** of respondents believe the industry has a good **growth** potential, which they have all chances to tap into.

North America

The average office occupancy in North America is as high as last year, with two-thirds of all workspaces in two top-performing groups.

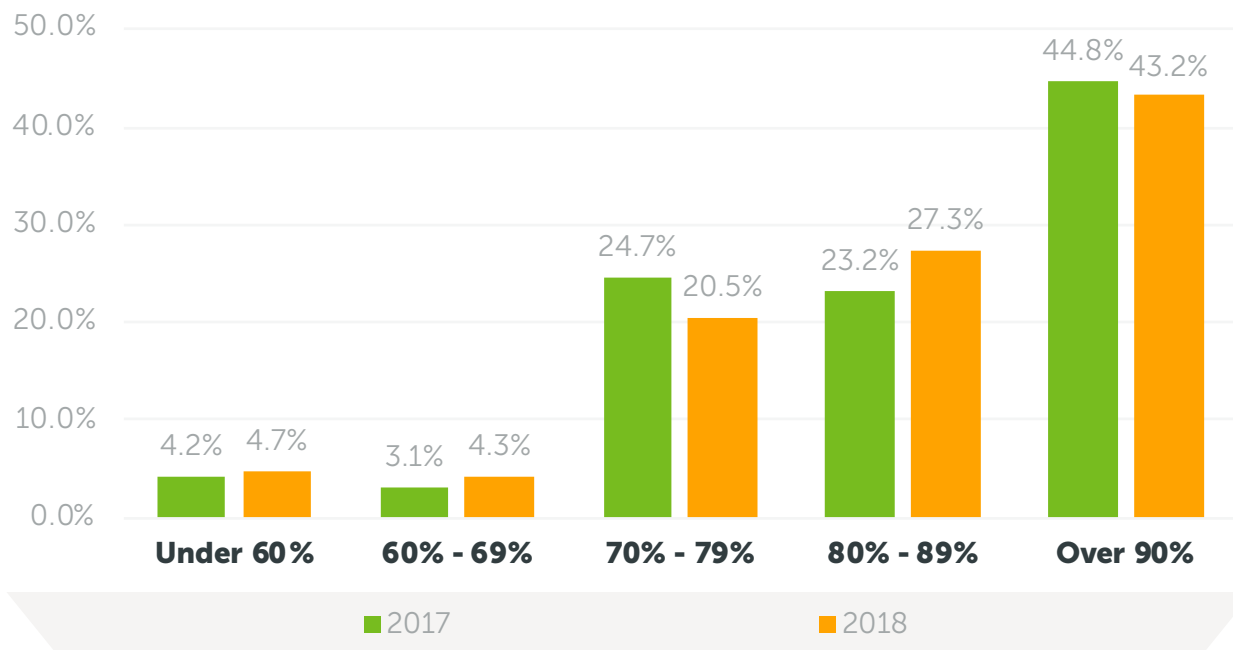
The achieved results are more than impressive, considering that the US market is among the largest in the world, or even number one, depending on measures. They also serve to confirm the conclusion we have reached above - flexible workspaces are growing in popularity, which is well-deserved as they bring many benefits to businesses opting for this solution.

The average office occupancy in North America is as high as last year, with two-thirds of all workspaces in two top-performing groups. Compared to 2017, over 30% of all respondents have more tenants, but the growth pace has slowed down a bit. This influence reverberates in the price expectations: more than half of workspaces do not plan to increase rates. However, like a year ago, almost 40% of North American providers believe they will be able to charge more.

The level of optimism about the future in North America is as high as in Europe: half of the providers believe new business achievements are on the horizon. As we mentioned above, improving service through better facilities, creative design and more flexible terms to build up a clientele is a widely used practice. As not everybody enjoys big city life, expanding to smaller towns is another strategy which might support the market growth.

1

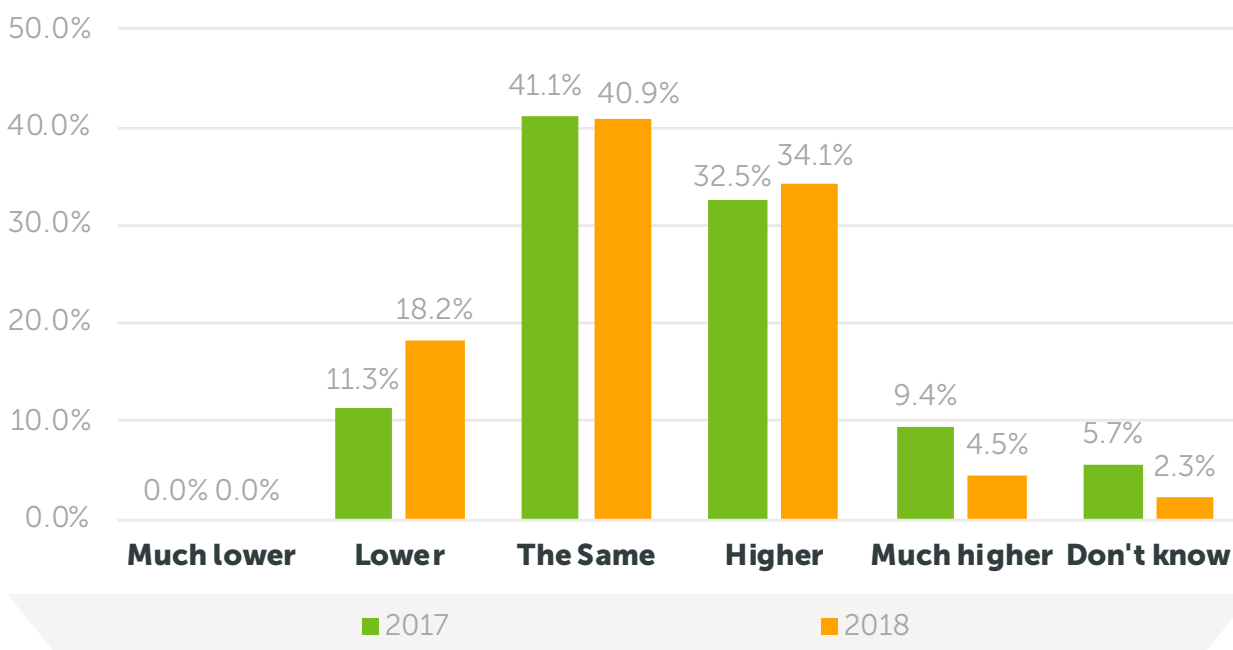
Average office occupancy



The occupancy figures have **not changed** much since last year. **Over 40%** of flexible workspaces are more than **90%** occupied, which resembles the situation in the European industry leaders. Only **9%** of the providers are in the lowest occupancy bands.

2

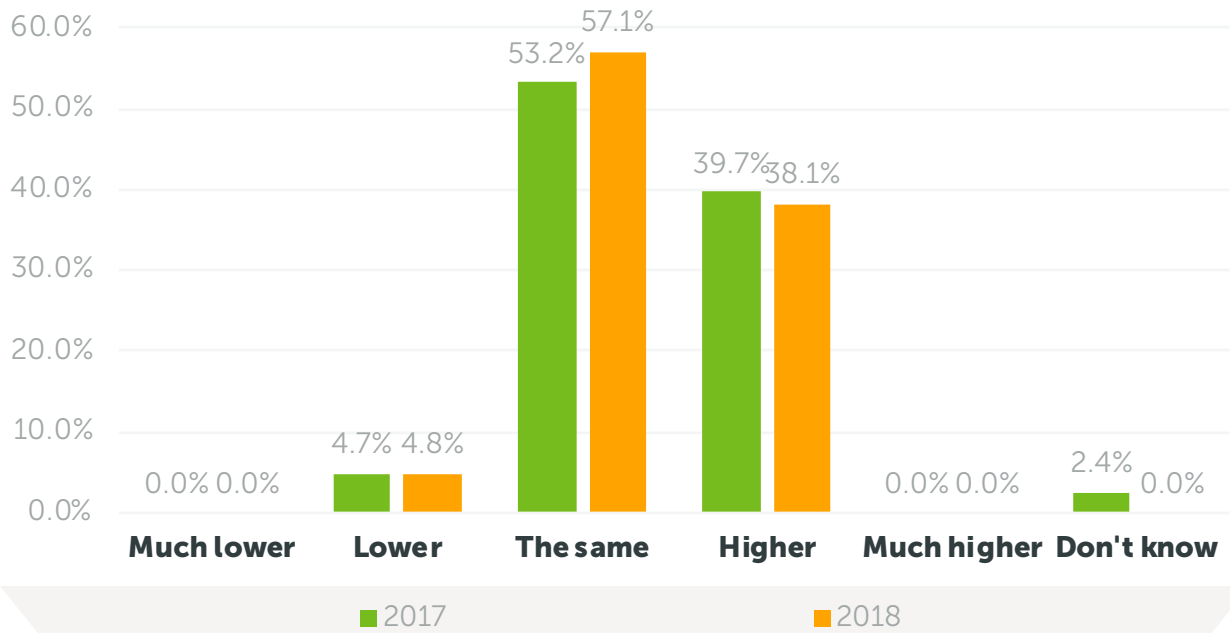
Occupancy compared to last year



The **majority** of providers have the **same** occupancy as last year, whereas over **one-third** have achieved **better** results. **18.2%** have **fewer** tenants than in 2017 - a **6.9%-points rise**. Despite this minor change, the market looks **very stable** in North America.

3

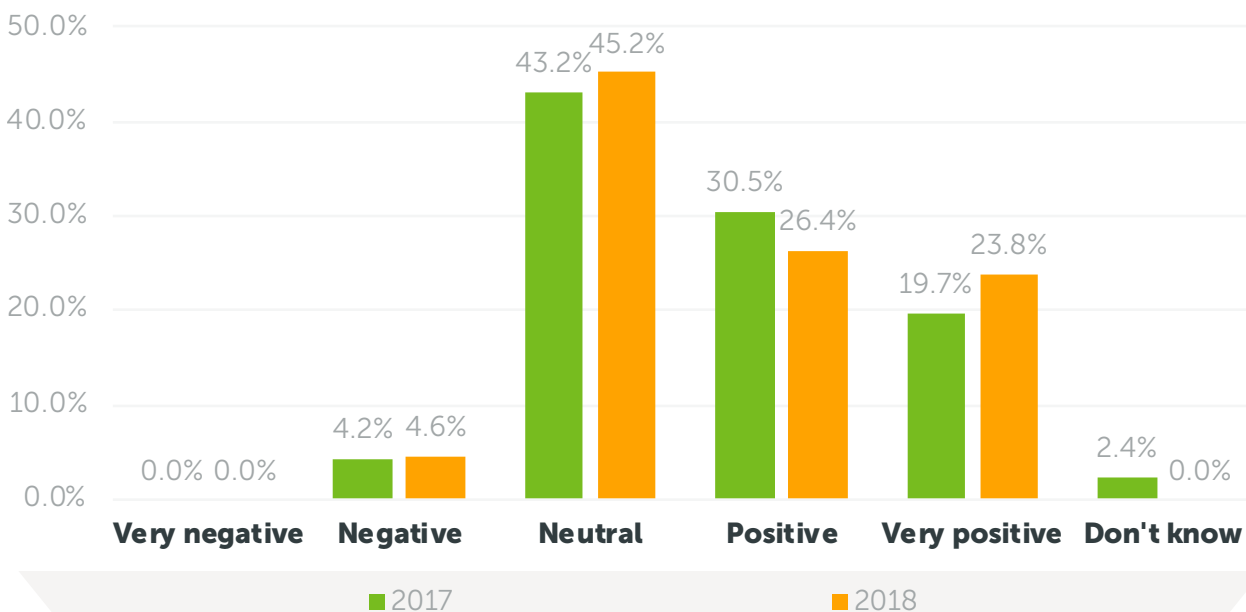
Expected price level in 6 months



Over **half** of the respondents predict the **same** level of prices in the next six months, whereas almost **40%** plan on **increasing**. It is not surprising as the market is thriving. Interestingly, only tiny **4.5%** of the respondents expect the prices to go down, and **none** - that they will soar or nosedive.

4

General outlook for the rest of 2016



The market sentiments in North America reflect the achieved results. Almost **half** of the survey participants are full of **optimism** about the industry development, which even outweighs the number of providers with a **neutral** attitude. Only **4.5%** believe the situation will get **worse**.

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