

# INDUSTRY SURVEY

2024

58 countries

1472 workspaces

MatchOffice conducted an extensive research on data concerning office occupancy, pricing, and the overall market outlook. Explore further to unveil the insights garnered from this survey.

# Table of Contents

Introduction .....	3
Europe .....	4
Belgium .....	9
Denmark .....	14
France .....	19
Germany .....	24
Italy .....	29
The Netherlands .....	34
Spain .....	39
Sweden .....	44
Asia .....	49
North America .....	53

The latest updates regarding the flexible workspace industry:

# The MatchOffice Industry Survey Report 2024

For the tenth 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 2024, the flexible office industry anticipates a pursuit of premium spaces with heightened emphasis on wellness, sustainability, and cutting-edge amenities. Businesses prioritize eco-friendly designs and user-centric technology integration, including touchless systems and AI-driven meeting rooms. Demand extends beyond urban hubs to suburban and regional markets. Task automation liberates employees for strategic tasks, while smart meeting rooms enhance productivity and comfort. This year underscores a pivotal shift towards holistic work environments, reflecting a commitment to employee well-being, technological advancement, and the creation of adaptable, high-quality workspaces.

We extend our gratitude to all our partners for their participation in our survey and the valuable insights into this year's business landscape. It brings us great pleasure to present the report and we hope it delivers the latest industry insights to you.



Jakob Dalhoff  
CEO, MatchOffice  
[jd@matchoffice.com](mailto:jd@matchoffice.com)



# Europe

In 2024, the European flexible workspace market continues to evolve displaying signs of adaptation and growth.

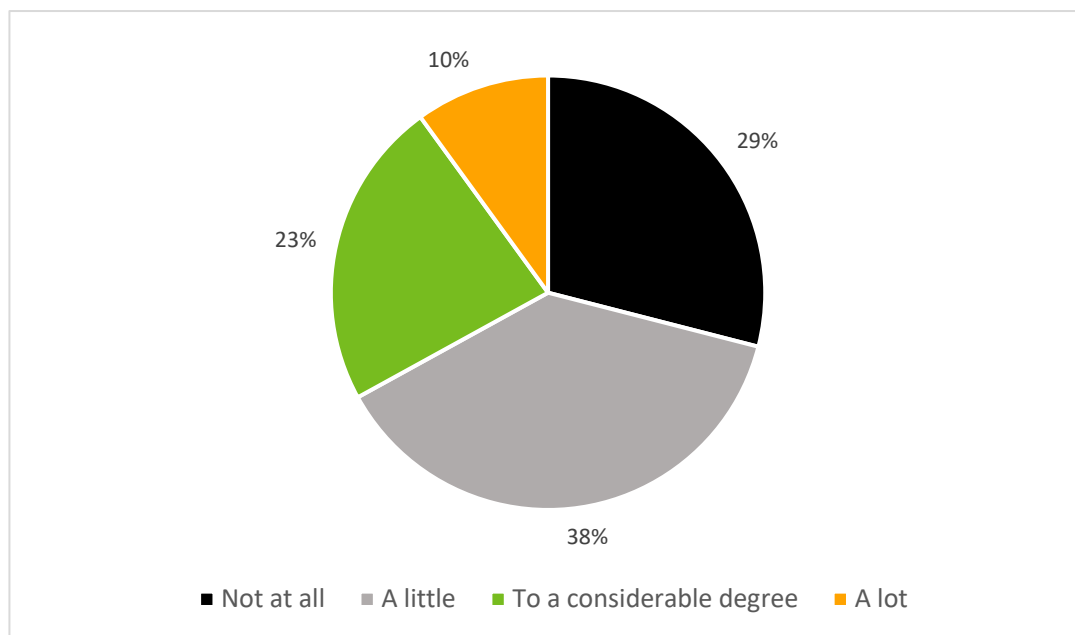
Aligned with industry trends, operators are increasingly prioritizing best-in-class spaces, emphasizing amenities and sustainability offerings to meet evolving tenant preferences. Wellness and sustainability are paramount considerations, with workspaces integrating features like natural light, ergonomic furniture, and wellness programs. Sustainability initiatives, including eco-friendly materials and energy-efficient designs, are gaining traction, reflecting a commitment to environmental responsibility.

Furthermore, there's a growing demand for high-quality flexible office spaces, driven by businesses seeking premium amenities and prime locations. Technology plays a crucial role in enhancing user experience, with providers integrating advanced solutions like touchless entry systems and smart building features. The flexible office market is witnessing expansion beyond major city centers, with suburban and regional markets experiencing significant growth. This shift reflects a broader trend towards decentralization and the increasing appeal of flexible workspace options outside traditional urban hubs.

Overall, the outlook for the European flexible workspace market in 2024 remains optimistic, driven by a continued focus on agility, employee well-being, and the creation of positive work environments that cater to the evolving needs of tenants.

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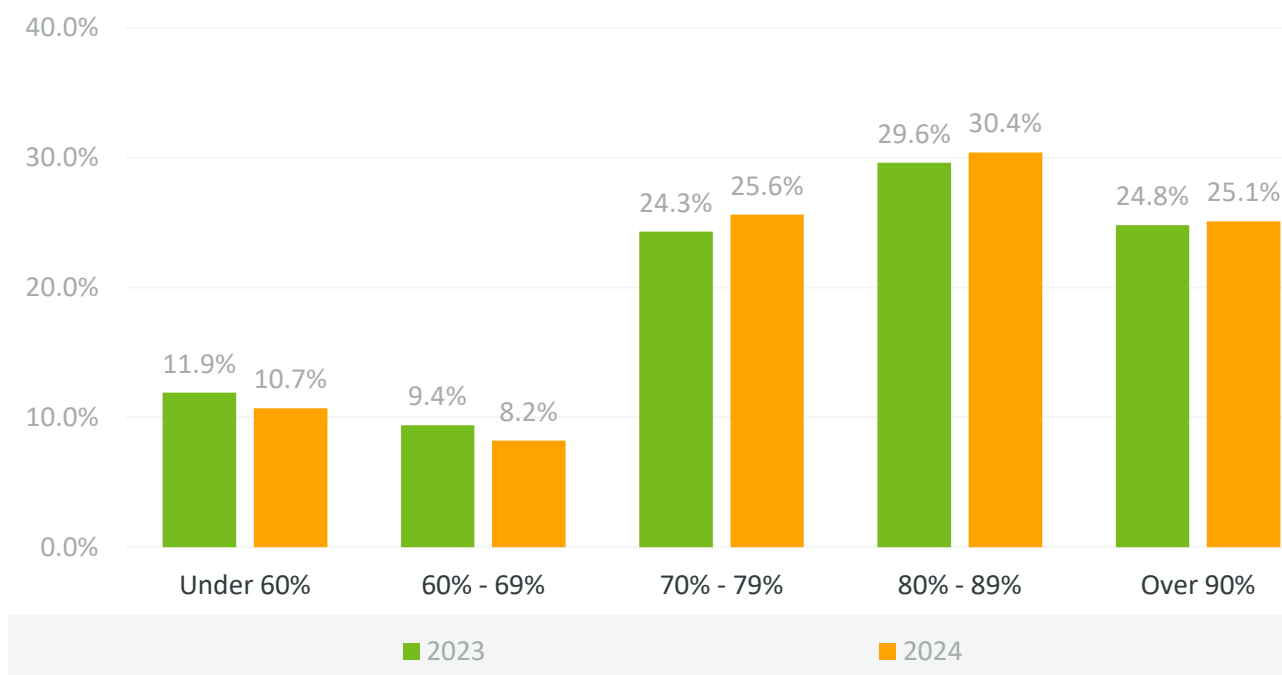
### AI impact on daily business operations and office workflow



38% of respondents reported AI influencing their daily operations slightly, followed by 23% experiencing considerable impact. 10% noted a significant influence, while 29% reported no influence at all on their office workflow.

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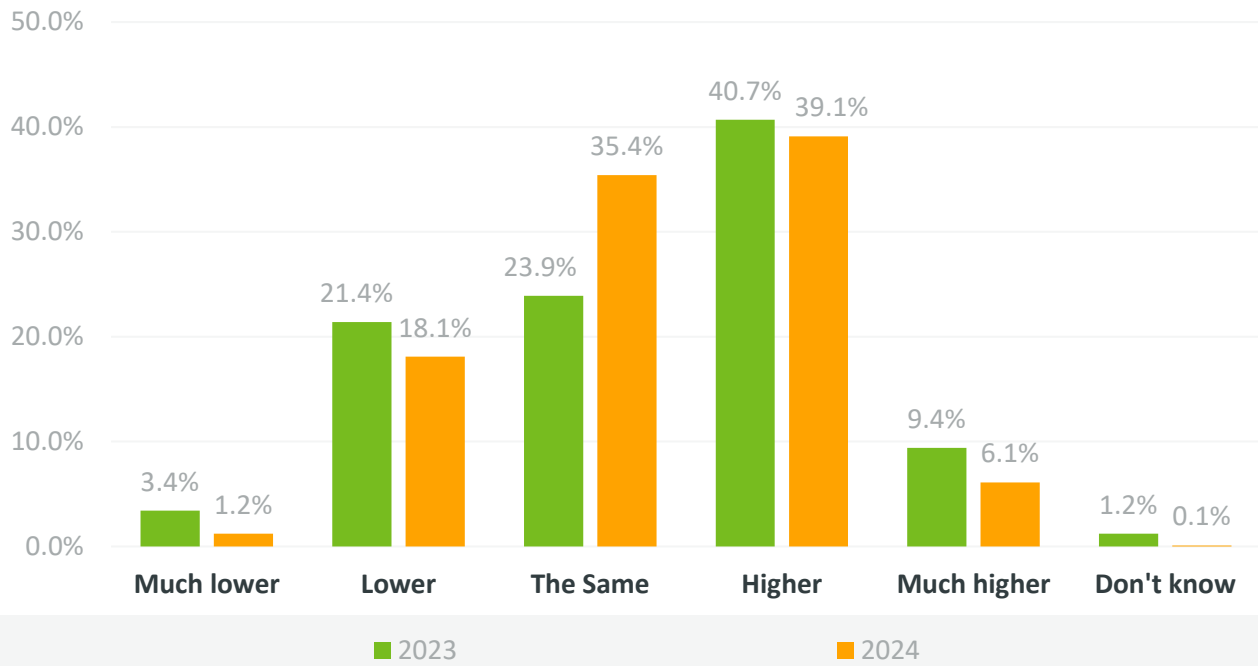
### Average office occupancy



In 2024, 10.7% of workspaces had occupancy rates under 60%. 60-69% decreased by 1.2%-points, 70-79% increased by 1.3%-points, 80-89% increased by 0.8%-points, and over 90% decreased by 0.3%-points.

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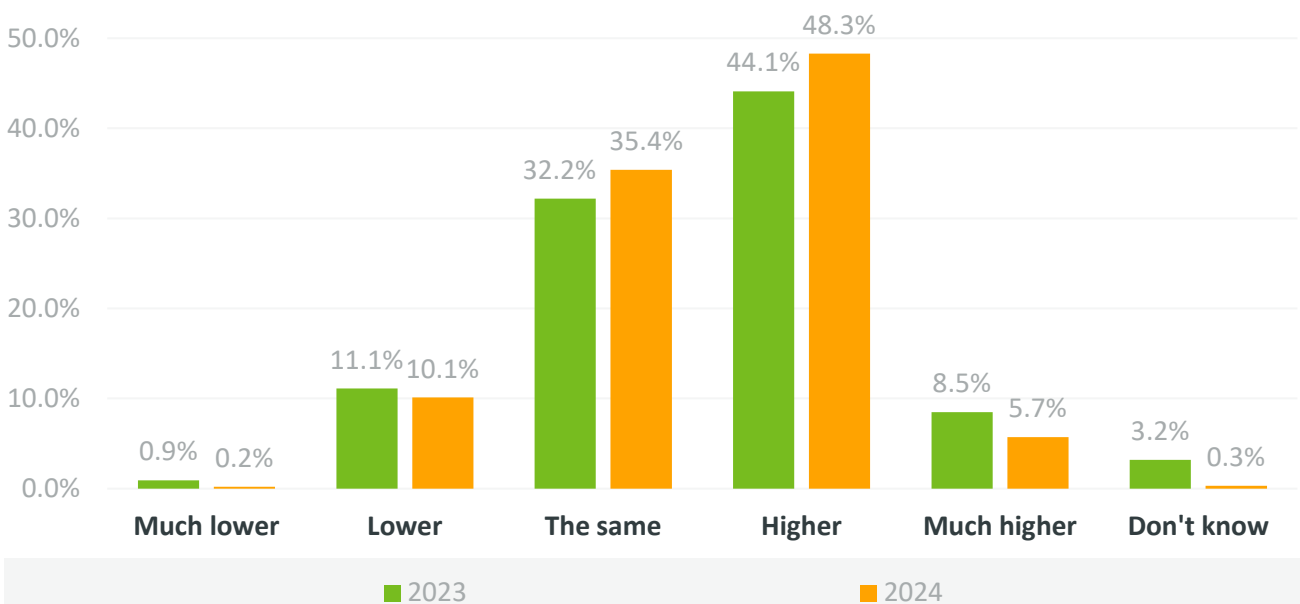
### Occupancy compared to last year



This year, there has been a decrease in providers reporting higher occupancy by 1.6%-points, with a notable rise of 15.7%-points in those reporting the same occupancy. Specifically, there's a 1.2%-point increase in the much lower category and a 2.4%-point decrease in the much higher category.

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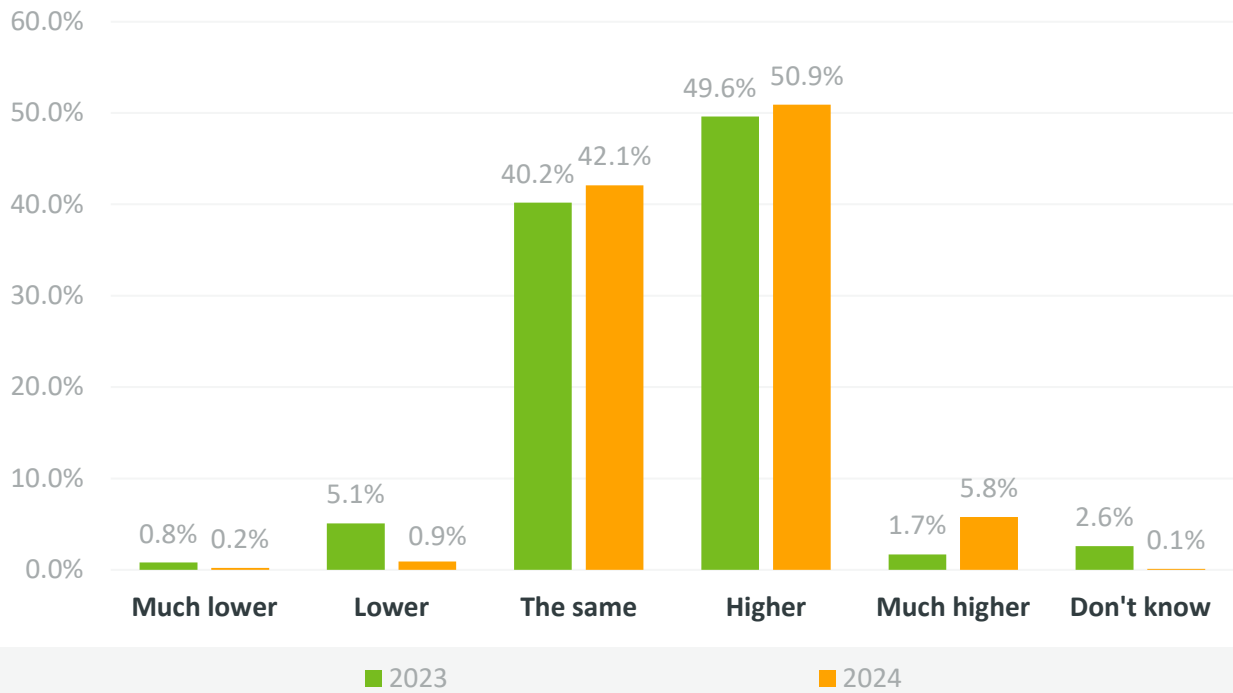
### Occupancy expectation in 6 months



In 6 months, 35.4% of respondents expect no change. 48.3% anticipate higher occupancy, reflecting confidence in improvement. Notably, there's a slight decrease in those expecting much higher occupancy, suggesting a tempered outlook.

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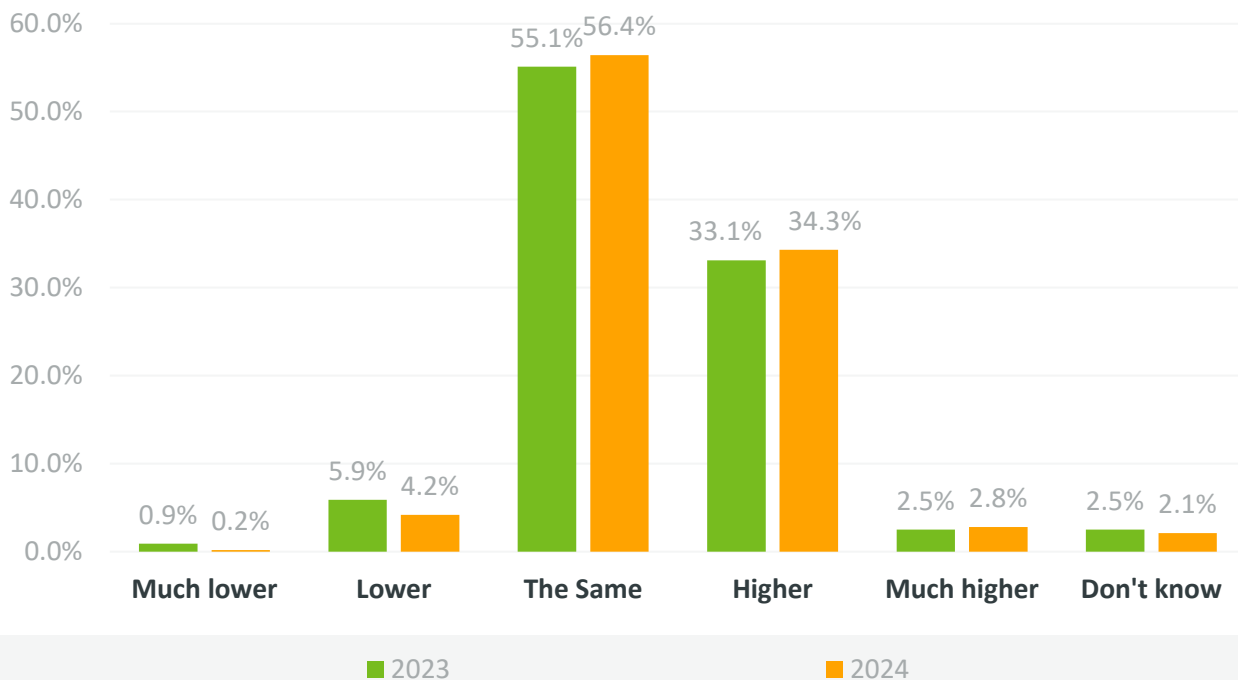
## Achieved prices for office contracts or workstations compared to last year



42.1% of workspaces retained pricing stability. Conversely, there's a 0.7%-point increase in those reporting much higher prices, indicating an adjustment to market dynamics, reflecting a nuanced response to changing conditions. 5.8% reported much higher pricing in 2024.

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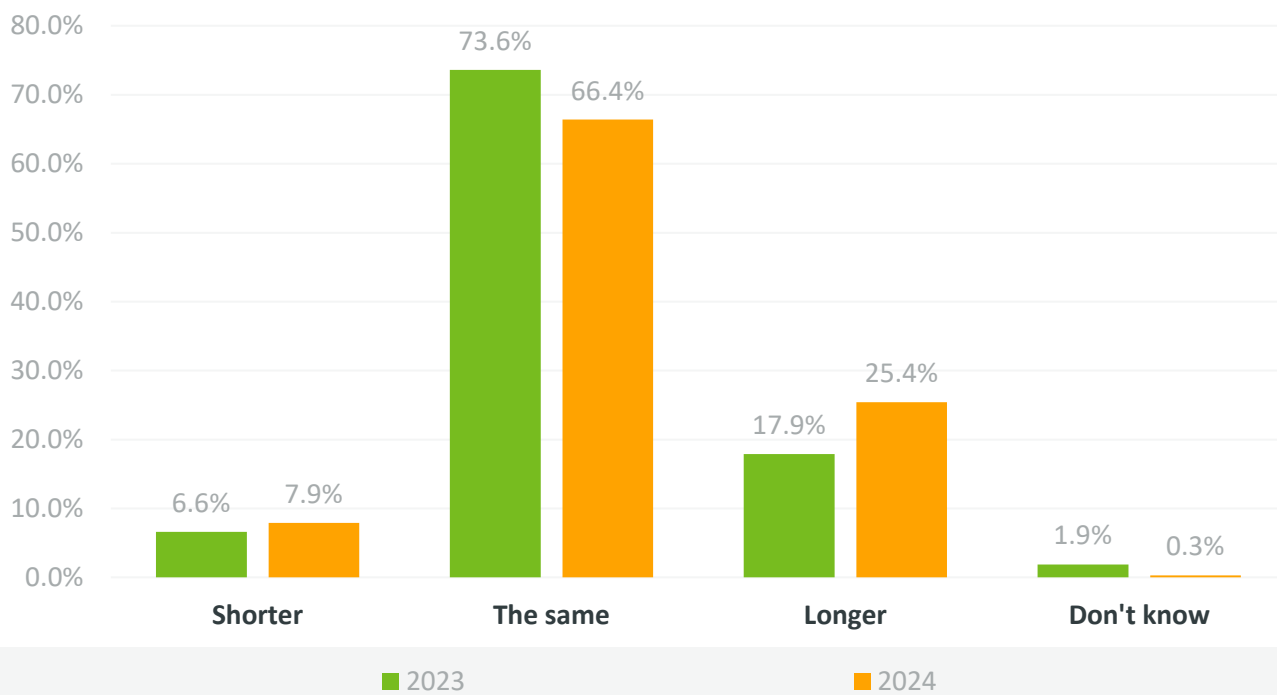
## Expected price level in 6 months



In the upcoming 6 months, 56.4% expect the prices to remain the same. 37.1% foresee an increase in price levels, while only 0.2% anticipate much lower prices.

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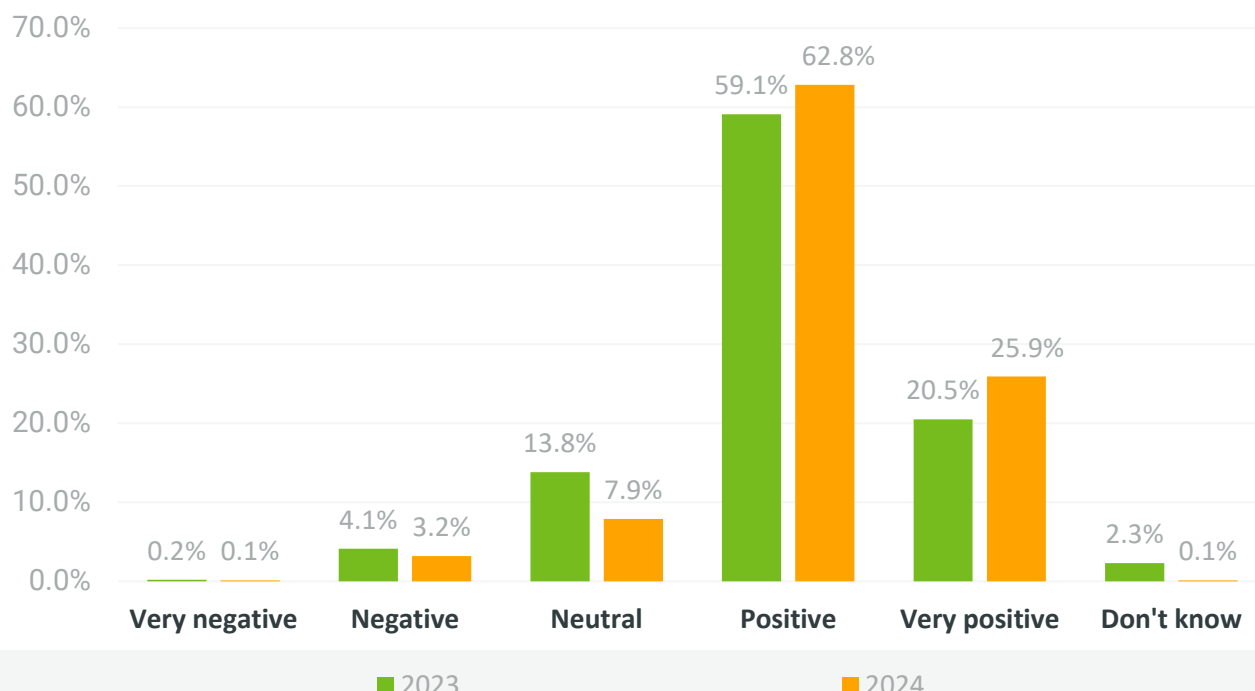
### Initial contract length compared to last year



Compared to last year, there’s been a notable increase in providers reporting longer initial contract lengths, rising from 17.9% to 25.4%. Meanwhile, the proportion with shorter contracts has slightly increased from 6.6% to 7.9%. 66.4% reported the same contract length as last year.

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### General outlook



Providers’ outlook on the industry remains overwhelmingly positive, with 62.8% expressing positivity, up from 59.1% in 2023. Additionally, the proportion with a “very positive” outlook increased notably from 20.5% to 25.9%.



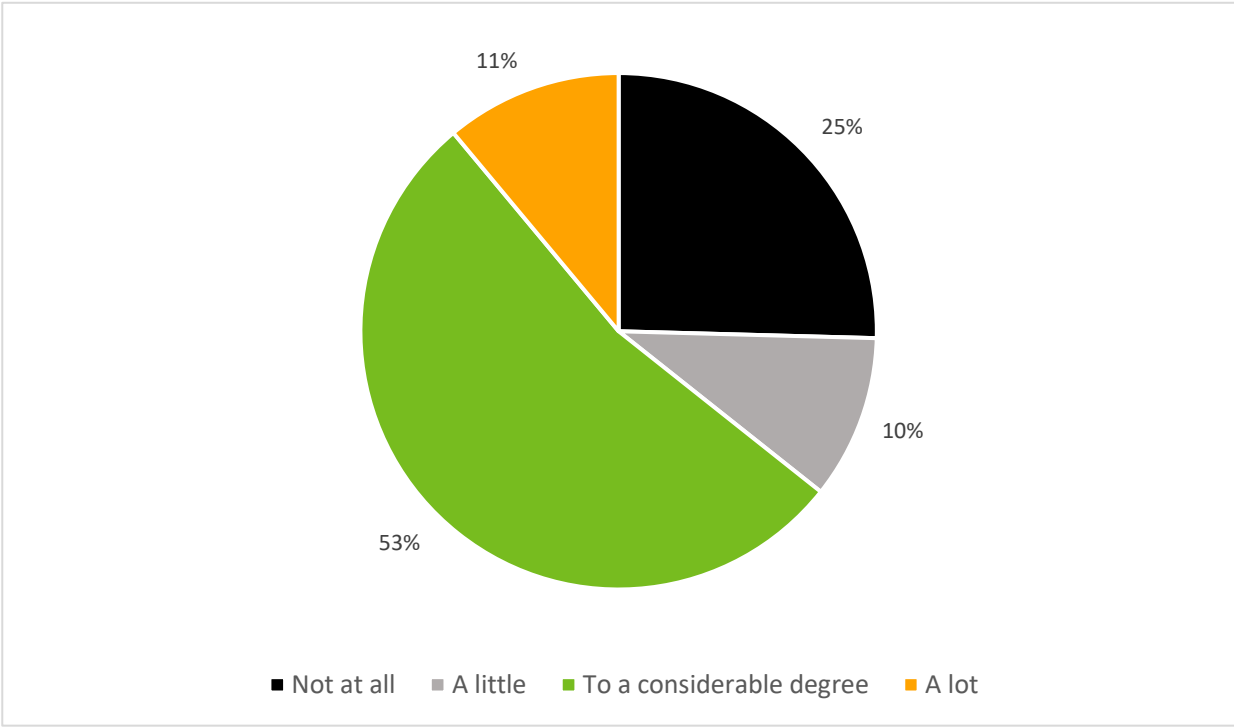
# Belgium

Belgium's workspace scene in 2024 demonstrates positive tendencies with 51.5% reporting stable or increasing occupancy. Optimism prevails as 70.9% anticipate a bright future. With stable contract lengths, the industry exemplifies resilience, signaling growth amidst challenges, heralding a promising tomorrow in the heart of Europe.



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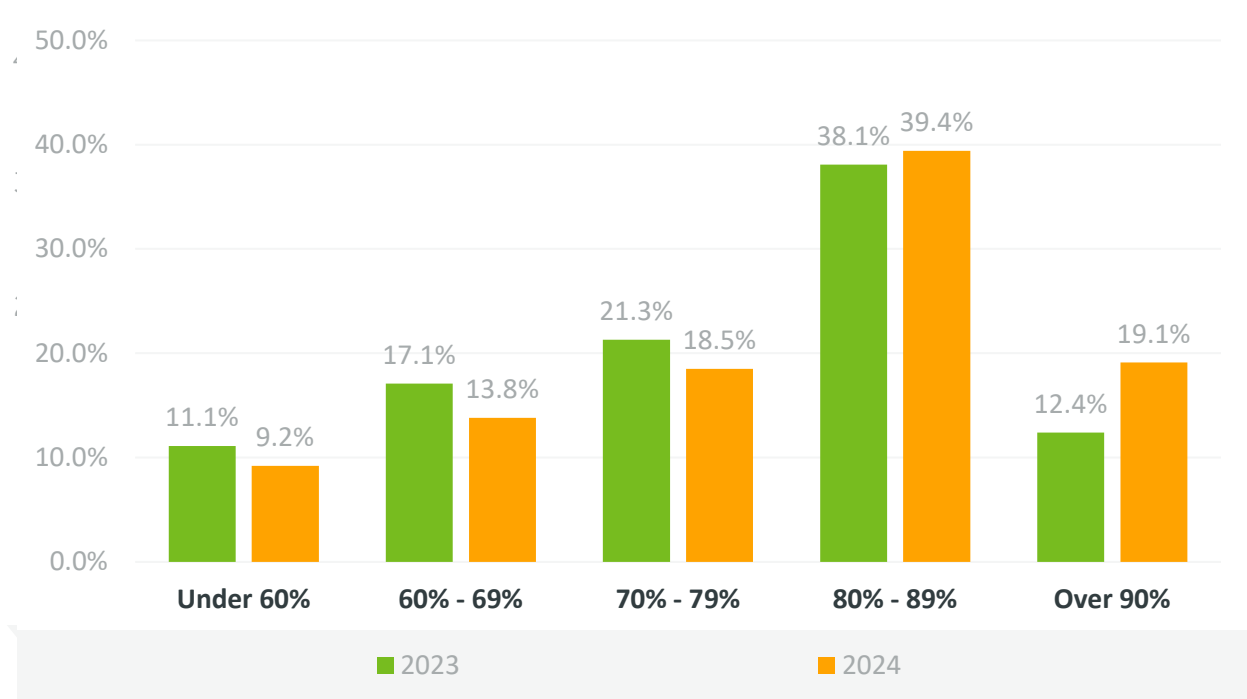
### AI impact on daily business operations and office workflow



In Belgium, artificial intelligence significantly impacts daily business operations and office workflow, with 53% reporting a considerable degree of influence. Notably, 11% state AI plays a significant role, while 25% indicate no influence, and 10% acknowledge a minor impact.

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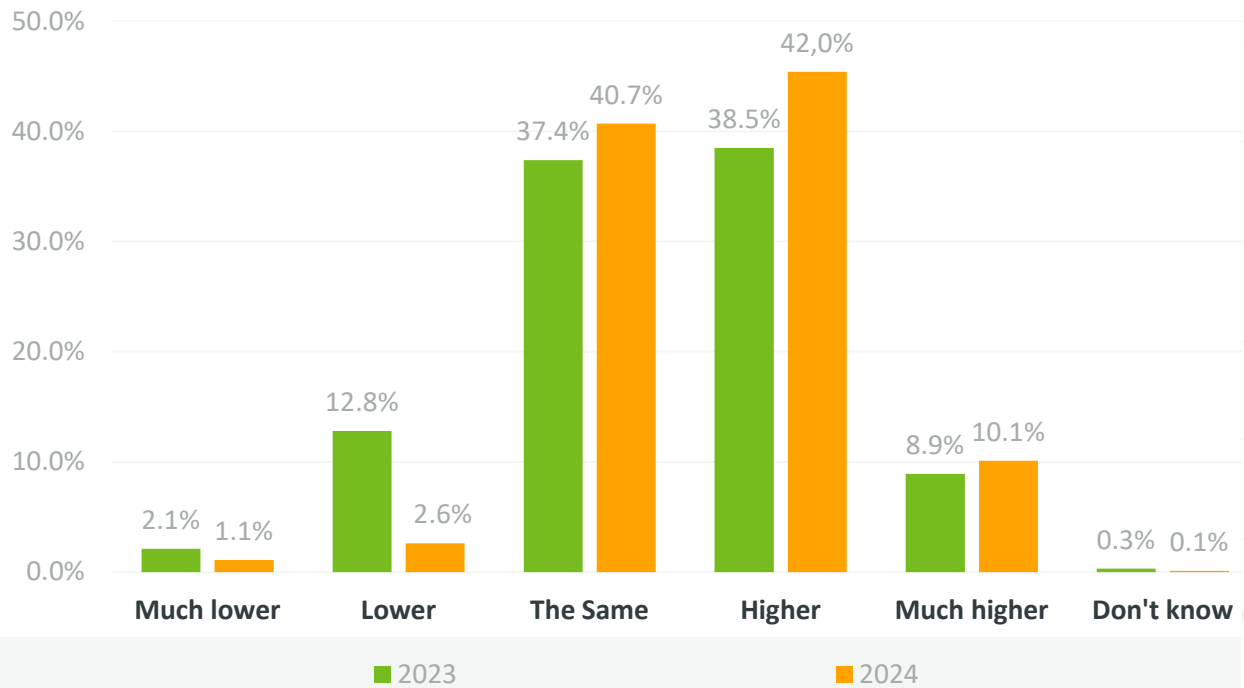
### Average office occupancy



The average office occupancy in Belgium remains stable. The majority, 39.4%, report occupancy between 80% and 89%, with a notable increase in those reporting over 90%, rising to 19.1% in 2024.

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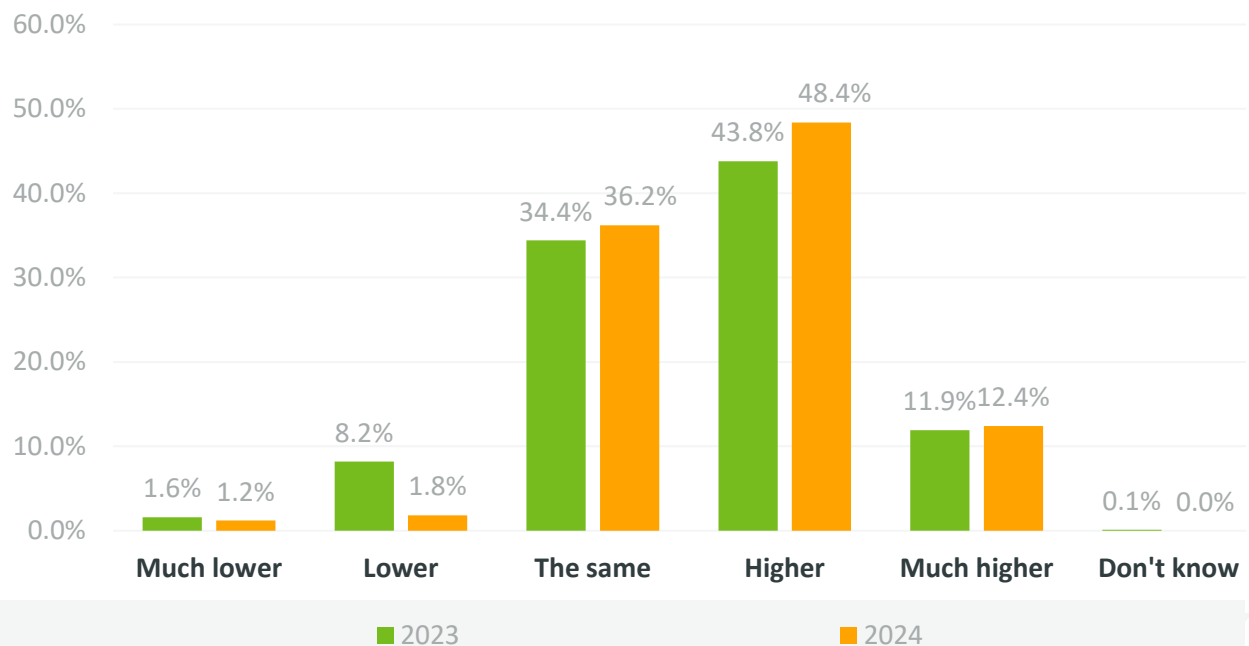
### Occupancy compared to last year



Compared to last year, there's a slight decrease in those reporting lower occupancy, from 14.9% to 3.7%. Conversely, 52.1% report higher or much higher occupancy, indicating an overall improvement in occupancy levels.

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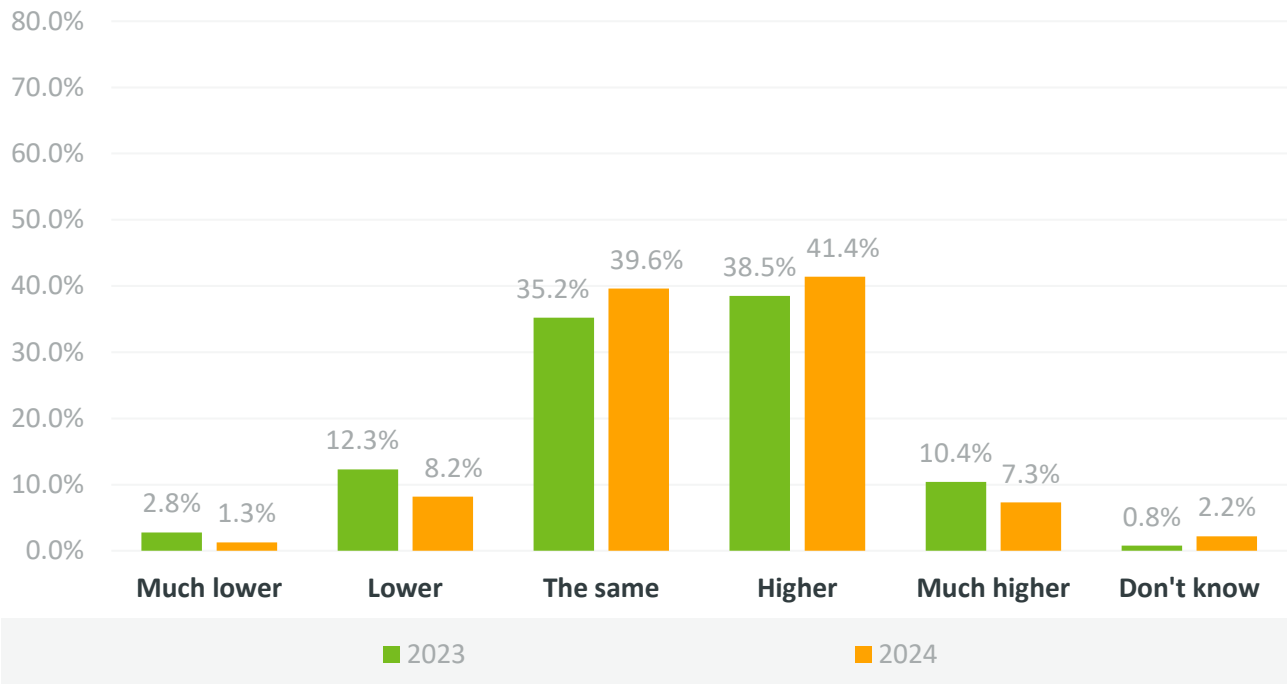
### Occupancy expectation in 6 months



Occupancy expectations for the next six months in Belgium indicate stability, with 36.2% of providers foreseeing no change. Encouragingly, a majority of 60.8% anticipate higher or much higher occupancy, reflecting confidence in the industry's positive trajectory.

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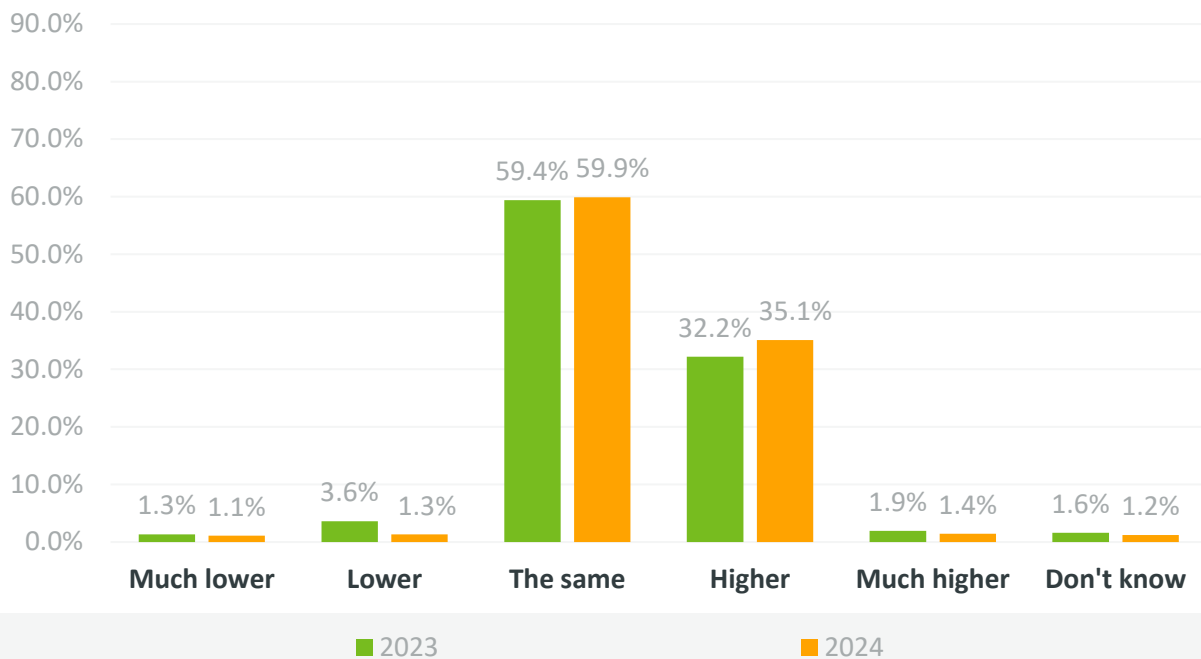
## Achieved prices for office contracts or workstations compared to last year



Compared to last year, achieved prices for office contracts or workstations in Belgium remain relatively stable, with 39.6% reporting no change and 48.7% experiencing higher or much higher prices.

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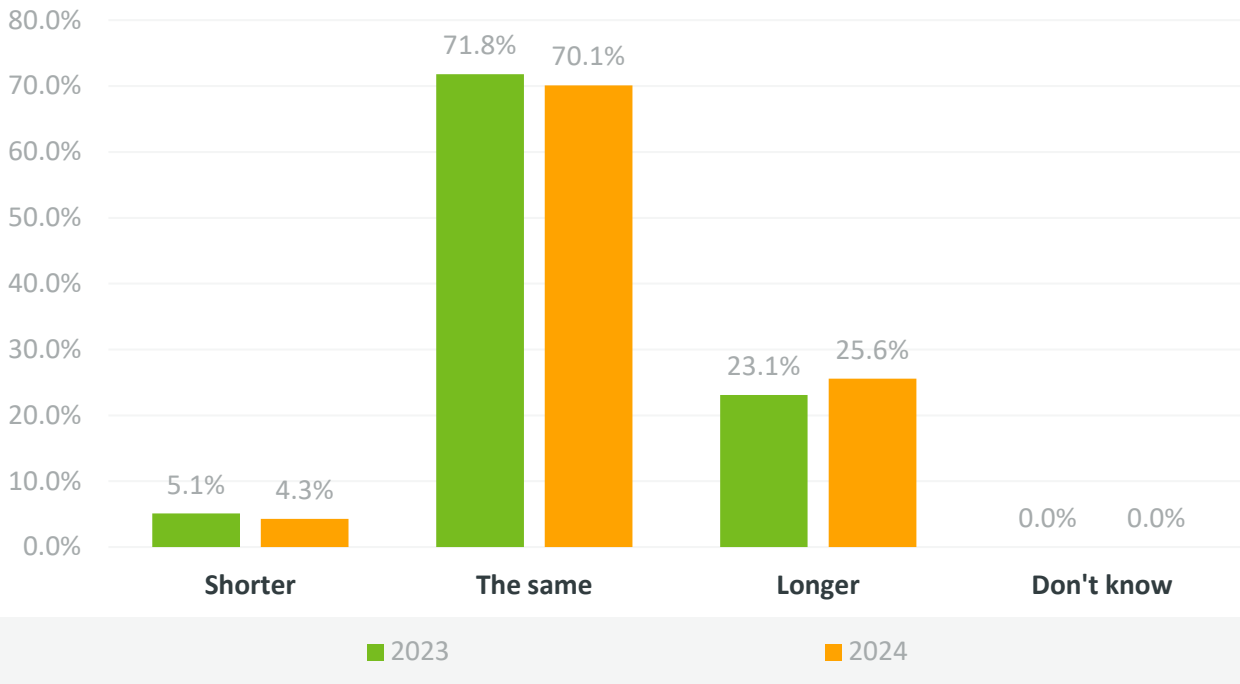
## Expected price level in 6 months



Providers in Belgium anticipate price levels to remain relatively stable in the next six months, with 59.9% expecting no change and 36.5% foreseeing higher prices compared to last year.

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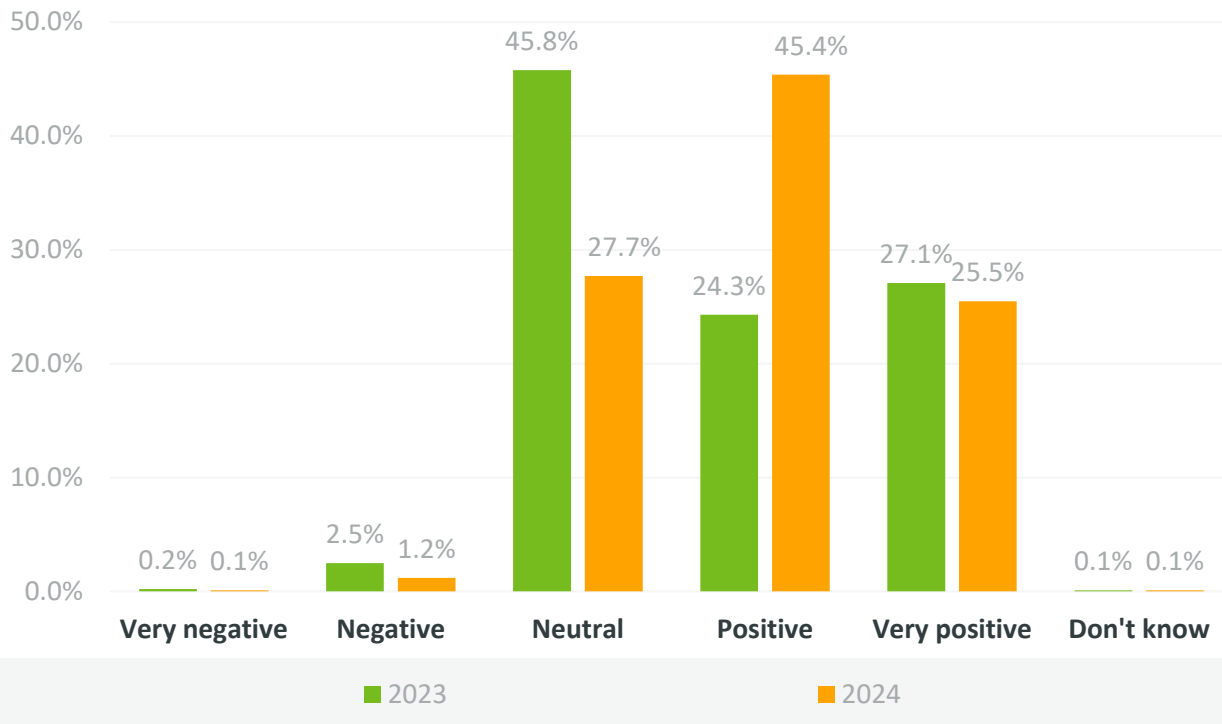
### Initial contract length compared to last year



In Belgium, initial contract lengths remain consistent, with 70.1% reporting the same duration compared to last year. However, there’s a slight increase in those reporting longer contracts, rising from 23.1% to 25.6%, indicating a trend towards greater contract stability.

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### General outlook



Providers in Belgium maintain a positive outlook on the future of the industry, with 70.9% expressing either positive or very positive sentiments. Notably, there’s a slight decrease in neutrality, indicating growing confidence in the market.

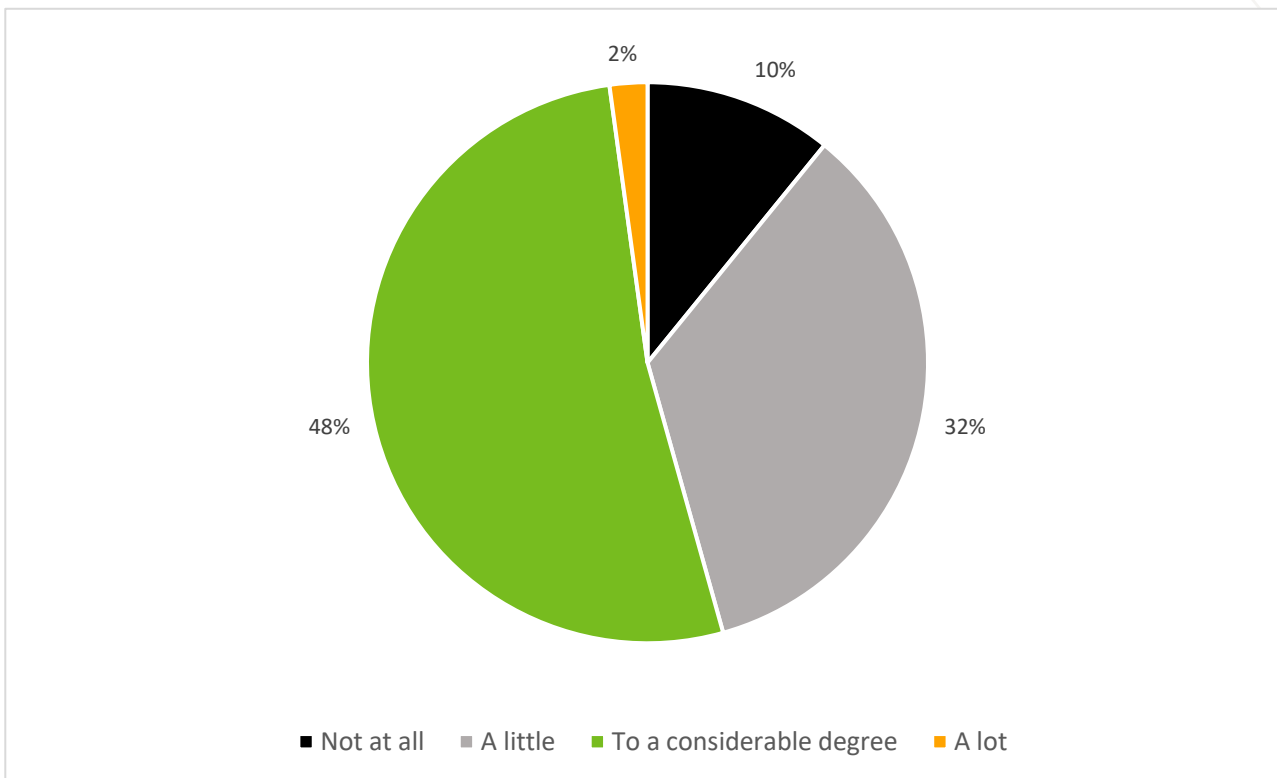
# Denmark

In 2024, Denmark's flexible workspaces project a positive outlook, with a majority reporting steady or increased occupancy levels. This trend signifies a confident stride towards recovery and growth, underlining the industry's resilience and optimistic perspective for the future.



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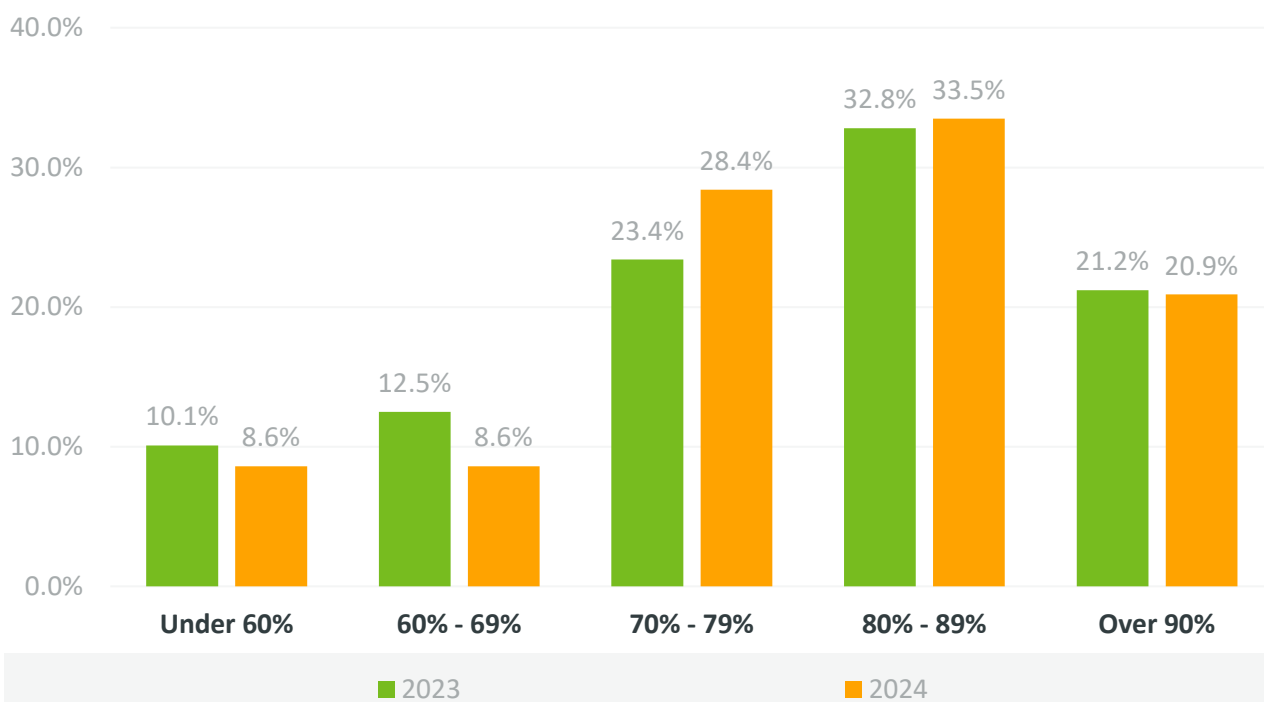
### AI impact on daily business operations and office workflow



48% of respondents noted a considerable influence of artificial intelligence on their daily business operations and office workflow. 32% reported a minor impact, while 10% experienced none at all. Only 2% stated a significant effect.

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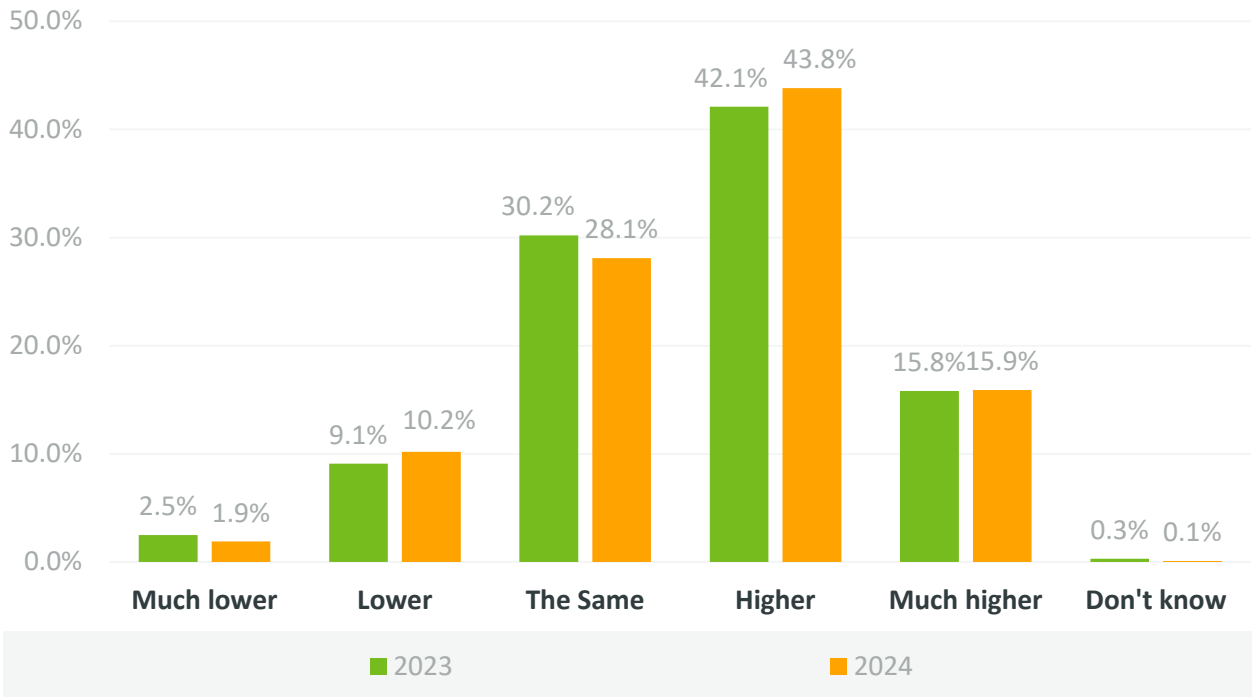
### Occupancy compared to last year



In 2023, 10.1% of respondents in Denmark reported office occupancy under 60%, while 21.2% had over 90% occupancy. By 2024, under 60% occupancy decreased to 8.6%, while the 80% - 89% range increased slightly to 33.5%.

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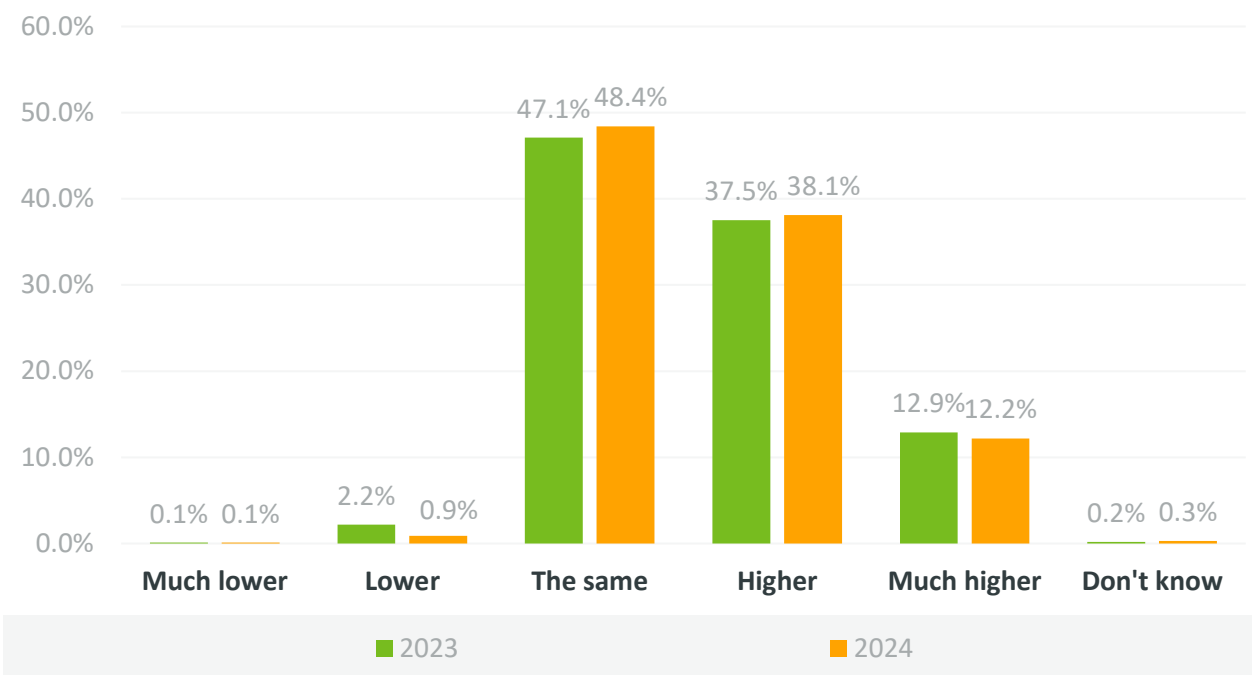
### Occupancy compared to last year



In 2023, 57.9% of Danish respondents reported higher or much higher occupancy compared to the previous year, while 11.6% indicated lower levels. In 2024, this trend persisted, with 59.7% reporting increased occupancy, and 12.1% experiencing a decrease, suggesting a continued upward trajectory in occupancy rates.

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### Occupancy expectation in 6 months

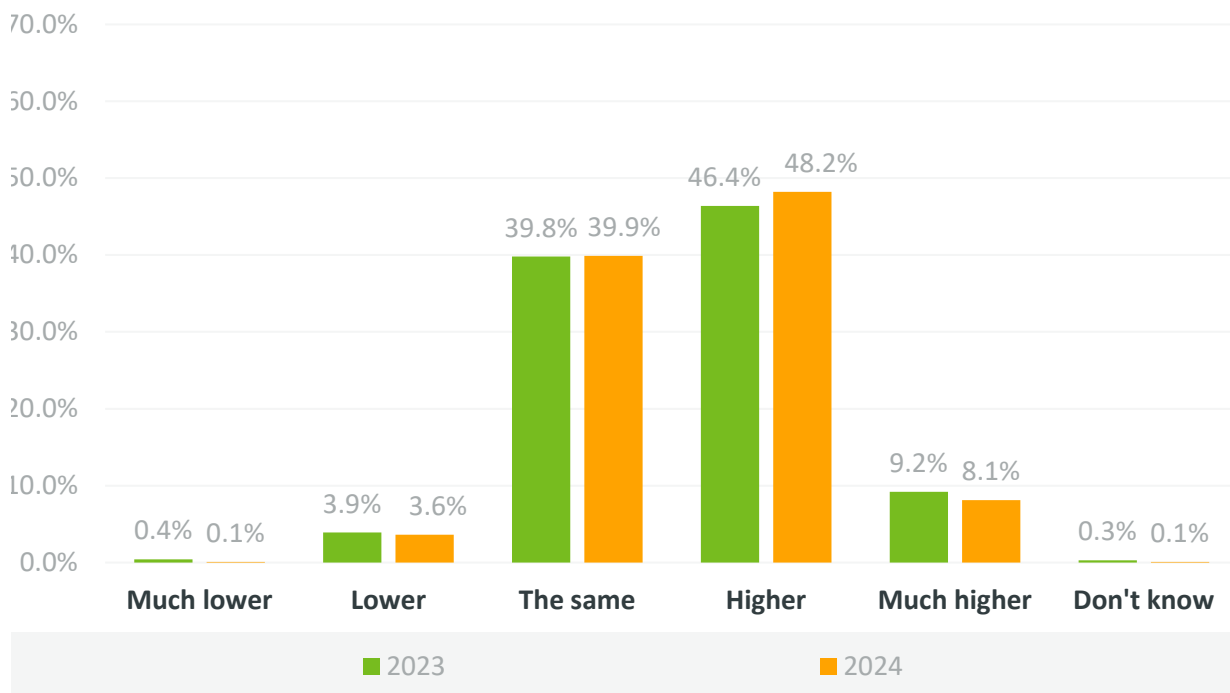


Anticipated occupancy rates in Denmark for the next six months remain optimistic. In 2023, 50.4% foresaw increased occupancy, with only 2.3% expecting lower levels. Similarly, in 2024, 50.3% projected higher occupancy.



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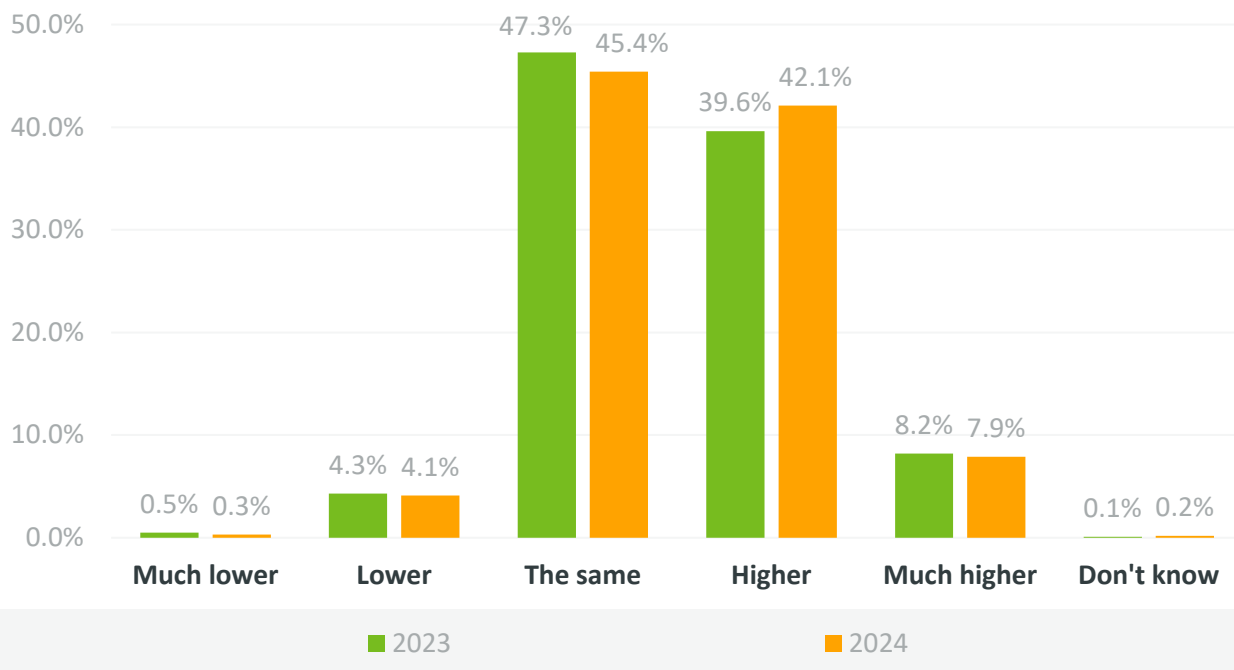
### Achieved prices for office contracts or workstations compared to last year



Danish respondents indicated a positive trend in achieved prices for office contracts or workstations. In 2023, over half (55.6%) reported higher or much higher prices compared to the previous year, with only 4.3% experiencing lower prices. This trend continued in 2024, with 56.3% noting increased prices.

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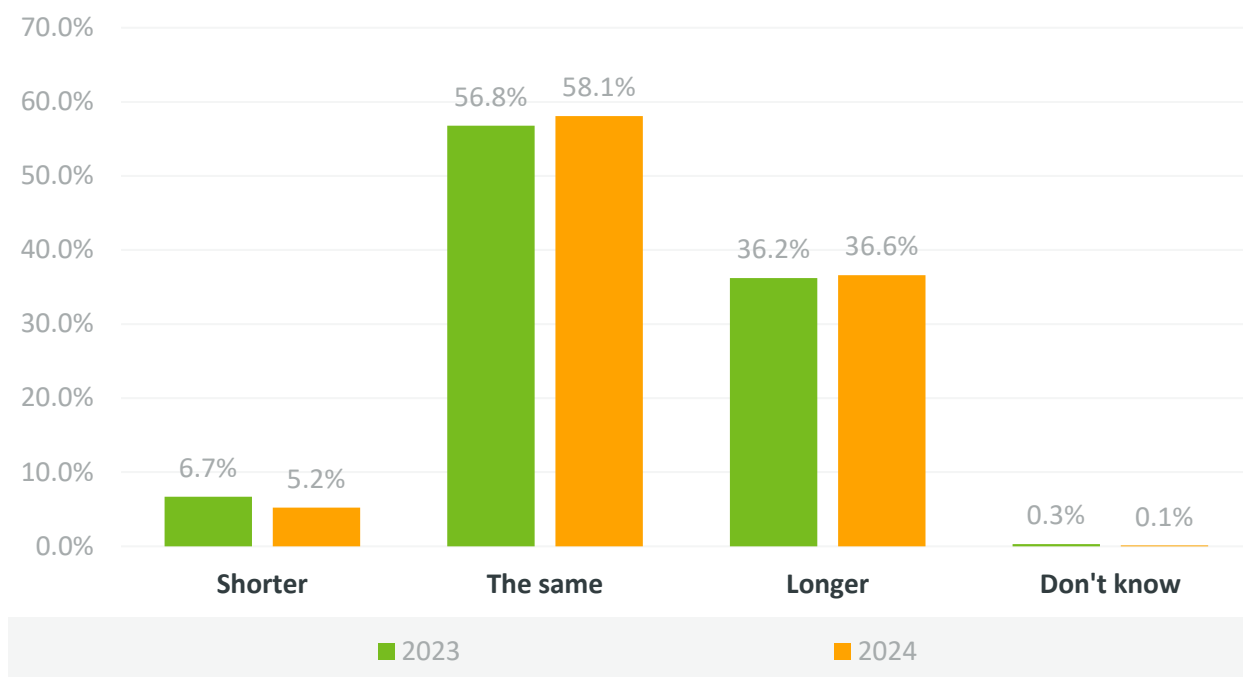
### Expected price level in 6 months



Respondents in Denmark hold a stable outlook on price levels for office contracts or workstations in the coming six months. In 2023, 47.3% expected prices to remain unchanged, while in 2024, 45.4% held the same anticipation.

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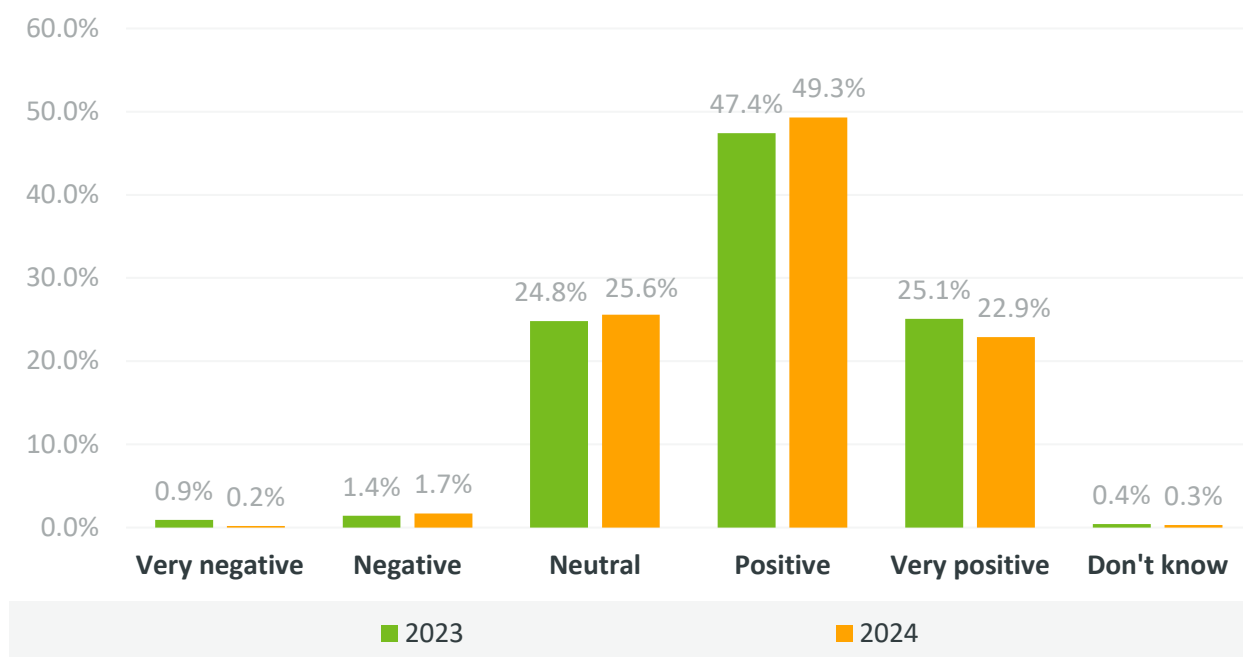
## Initial contract length compared to last year



Comparing initial contract lengths reveals a consistent trend in Denmark. In 2023, 56.8% reported unchanged contract durations, a pattern mirrored in 2024 with 58.1%. Despite fluctuations in market dynamics, the majority of respondents (over 55%) maintained a steady approach to contract lengths over the surveyed years.

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## General outlook



Denmark's industry outlook showcases resilience and optimism. In 2023, nearly three-quarters of respondents (72.5%) leaned towards positivity, a sentiment slightly reinforced in 2024 (72.2%).

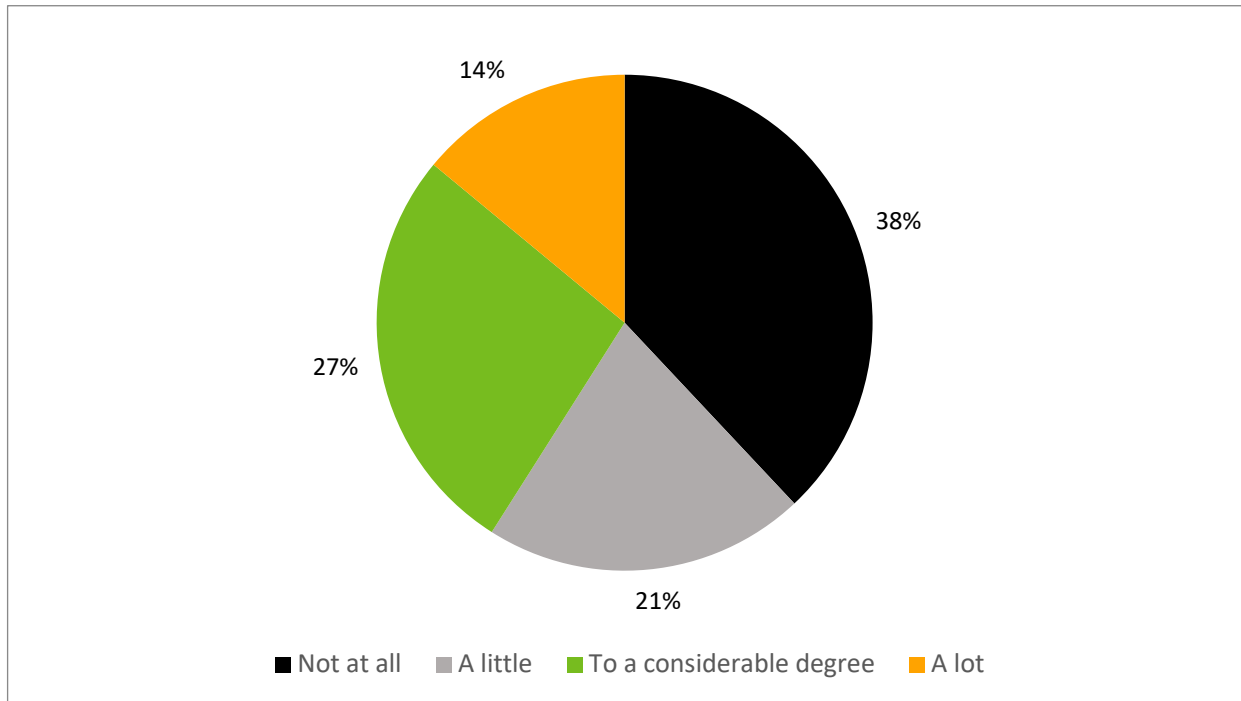
# France

In 2024, French respondents reveal a consistent trend of stable or increased occupancy levels, with over 60% maintaining the same or higher rates compared to the previous year. Additionally, there's a notable increase in longer initial contract lengths, suggesting potential shifts in leasing dynamics. Despite slight variations, optimism prevails regarding the future of the industry, indicating confidence in sustained growth.



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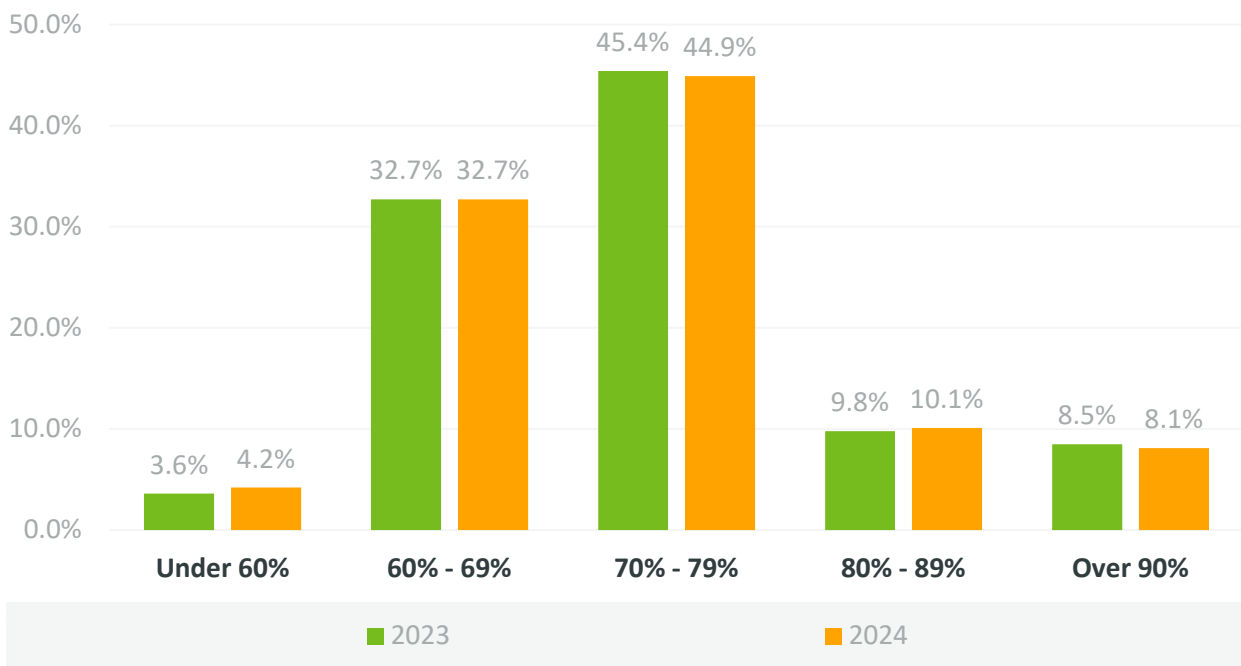
## AI impact on daily business operations and office workflow



Our French respondents reveal varied impacts of artificial intelligence on their business operations and office workflow. While 38% experience no influence, 41% acknowledge at least some effect, underscoring the evolving integration of AI in workspace dynamics.

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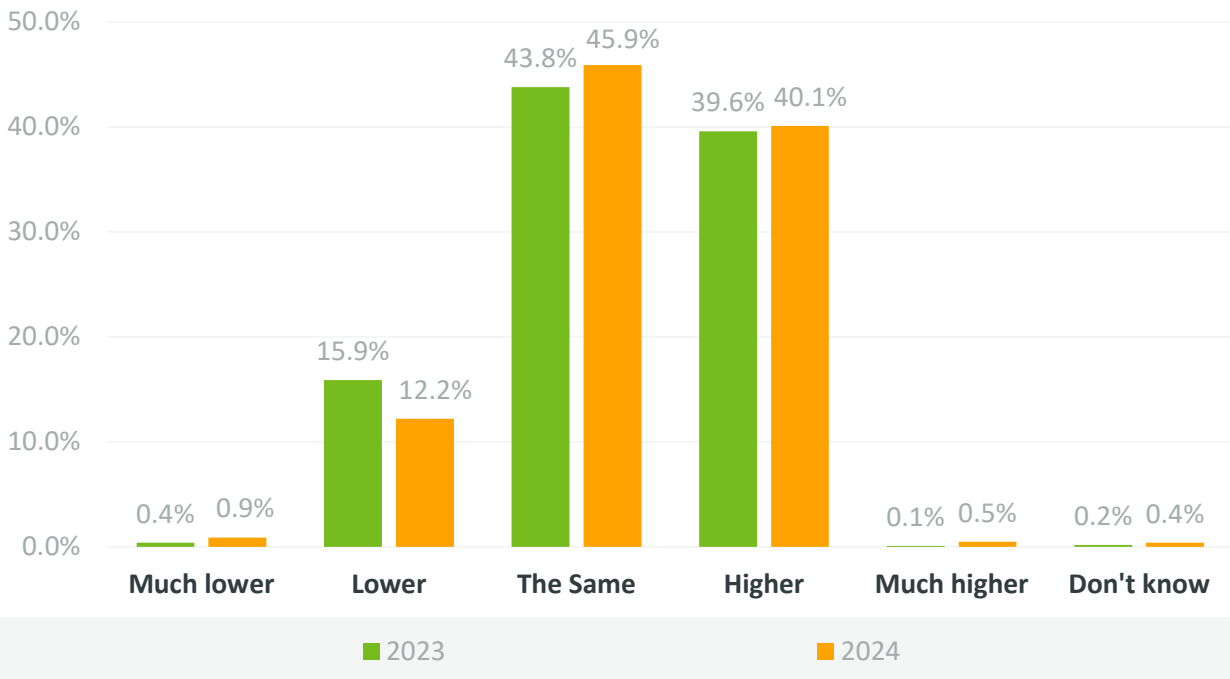
## Average office occupancy



Office occupancy trends in France remain stable over the surveyed years. In 2023, most (78.7%) spaces were occupied within the 60%-79% range. Similarly, in 2024, this range persisted, indicating a balanced distribution across occupancy categories.

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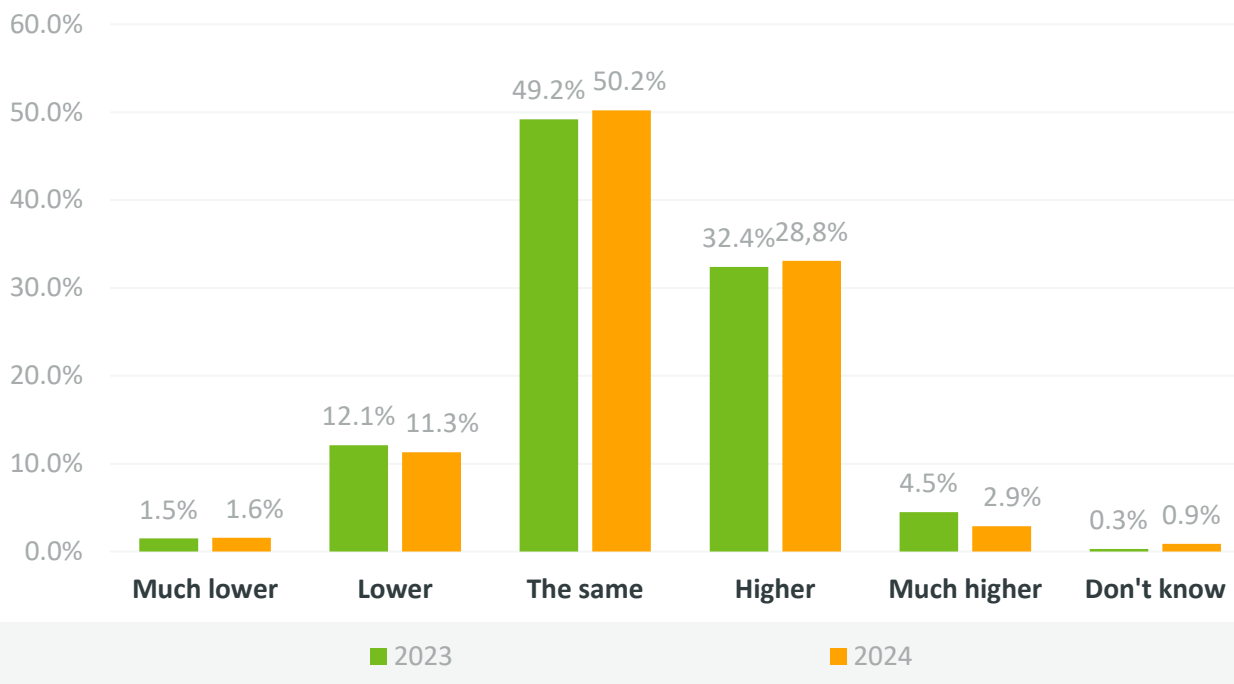
### Occupancy compared to last year



Comparing occupancy to the previous year indicates consistency. In 2023, 83.4% experienced similar or higher occupancy rates. This trend persisted in 2024, with 86% reporting the same or increased occupancy. Such continuity reflects resilience and adaptability in the face of evolving workspace demands

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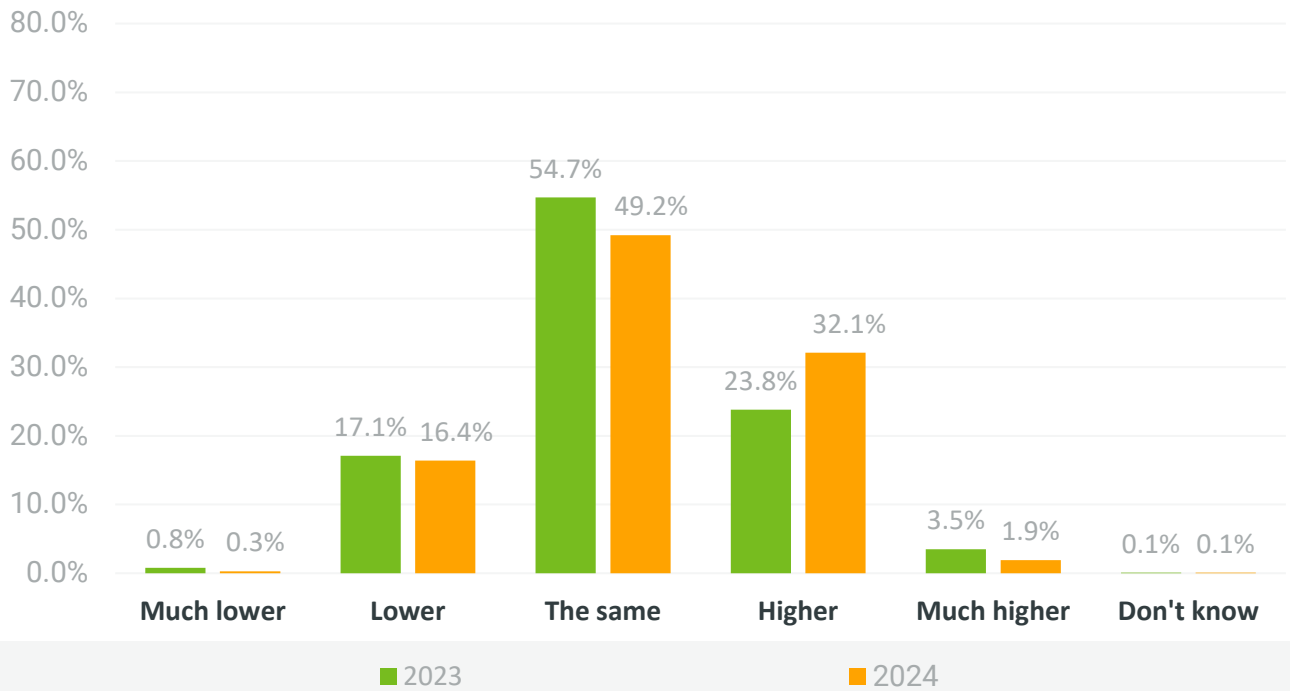
### Occupancy expectation in 6 months



In 2024, we witness a remarkable continuity in occupancy expectations. A substantial 50.2% foresee the same occupancy levels, while 33.1% anticipate higher utilization, indicating a consistent outlook on workspace demand.

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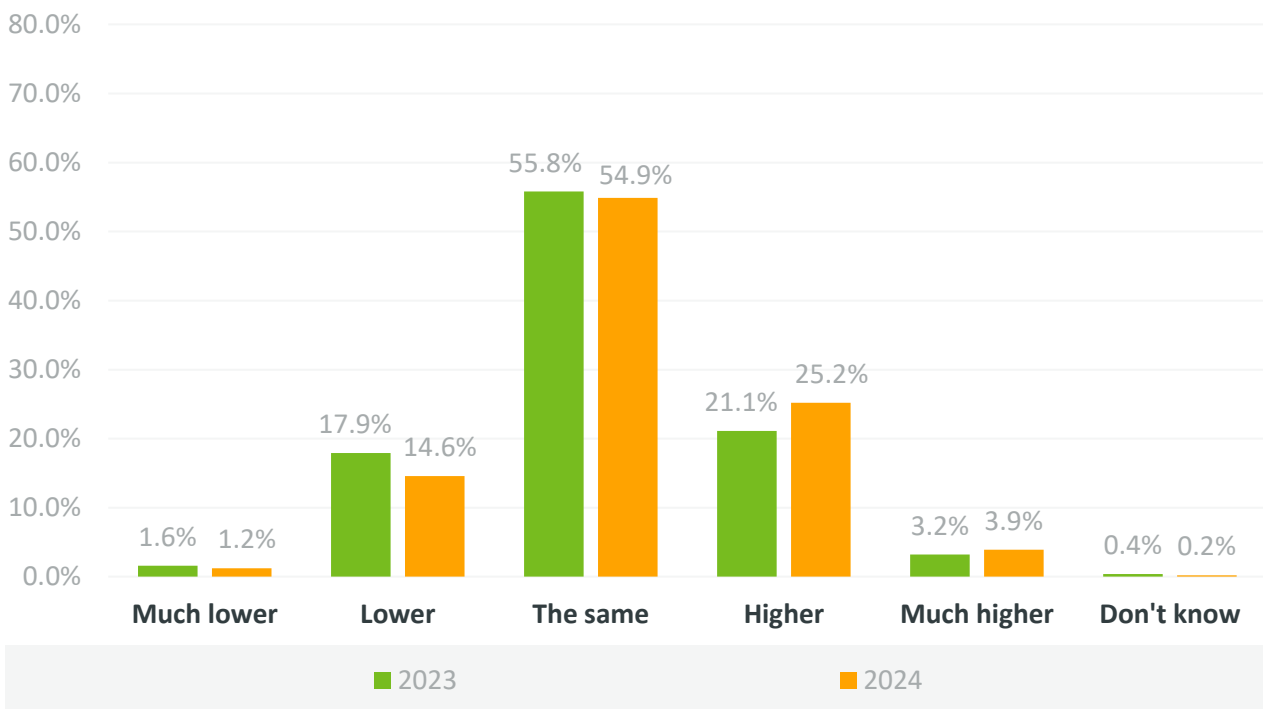
## Achieved prices for office contracts or workstations compared to last year



In 2023, the majority (78.5%) of French respondents reported achieved prices for office contracts or workstations remained stable or higher compared to the previous year. Similarly, in 2024, 82.3% maintained the same or increased pricing, indicating overall consistency in pricing trends.

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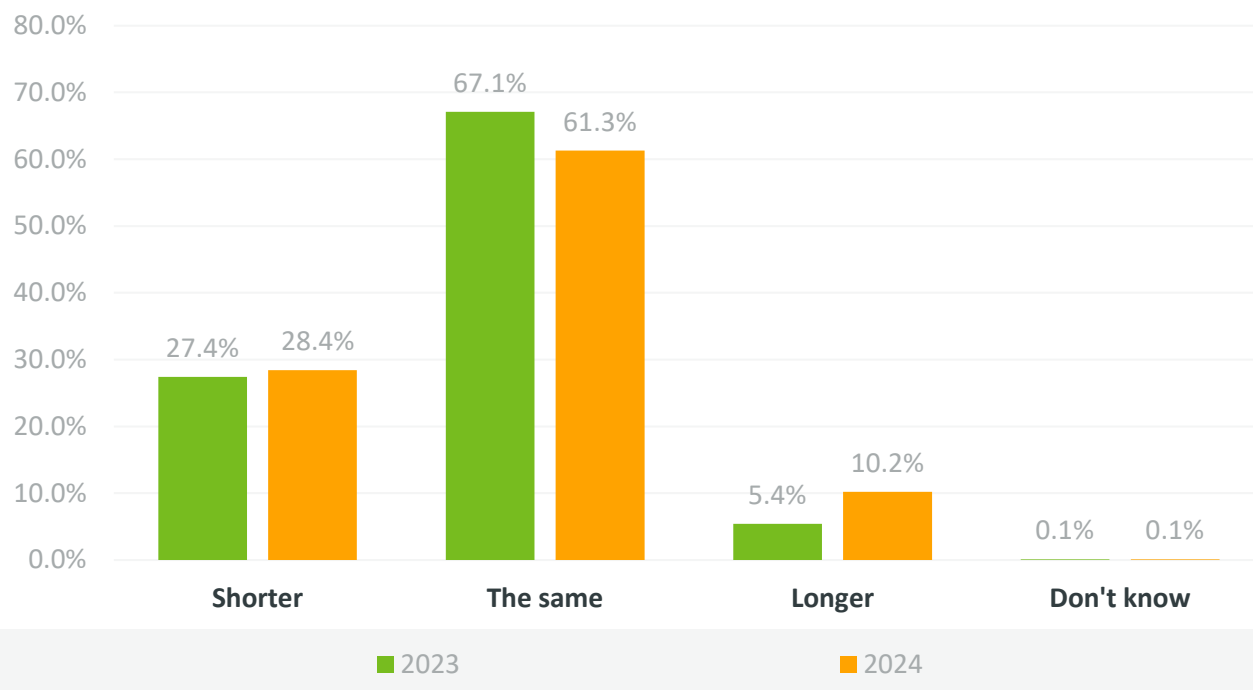
## Expected price level in 6 months



In 2024, echoing the previous year, the majority (54.9%) of French workspaces anticipate prices to remain the same in the next 6 months. However, 25.2% foresee a price increase, marking an increase of 4.1%-points from the previous year's projections.

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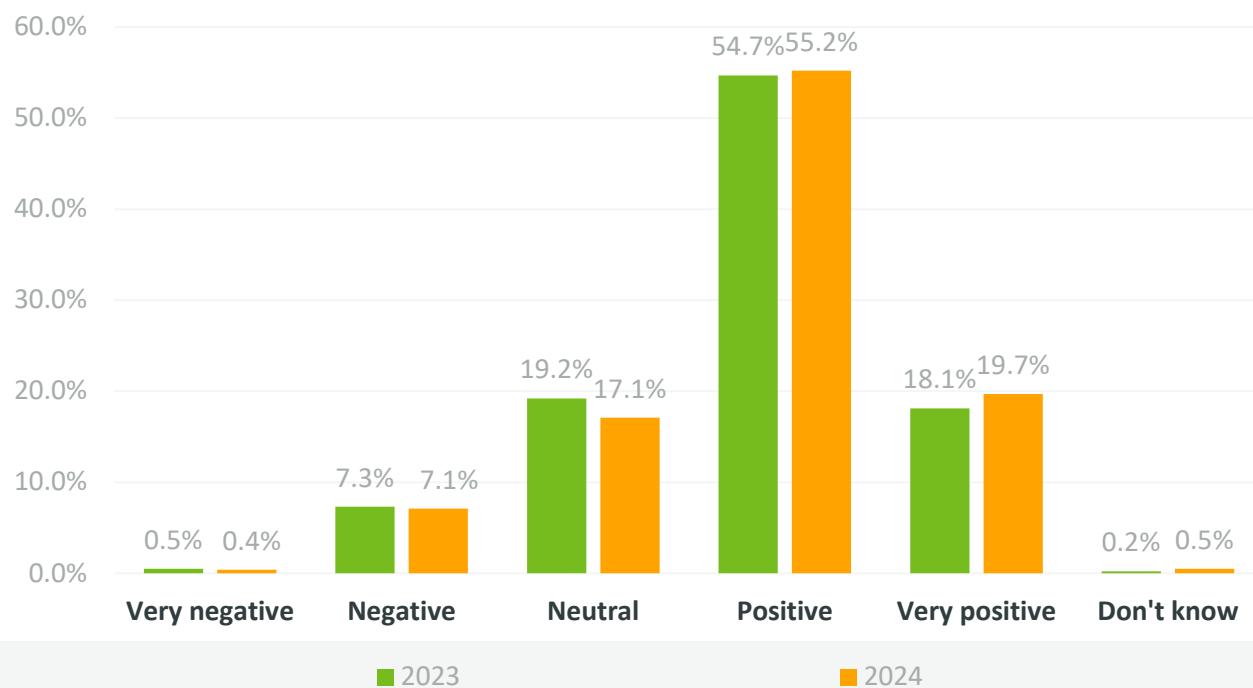
## Initial contract length compared to last year



In 2024, our French respondents show a slight increase in longer initial contract lengths compared to the previous year, rising from 5.4% to 10.2%. Meanwhile, the proportion of workspaces with shorter or the same contract lengths remains

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## General outlook



In both 2023 and 2024, the majority of French respondents expressed a positive outlook on the future of the industry, with slight variations. Confidence remains high, indicating optimism and stability in the sector.

# Germany

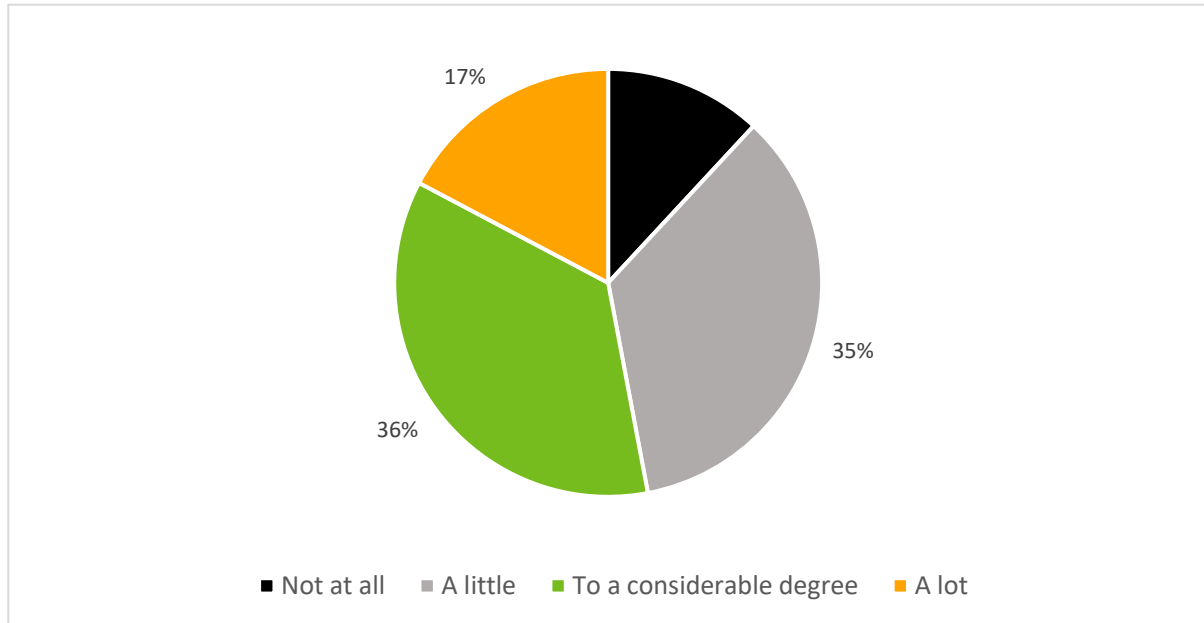
In 2024, we see positive trends across various facets of the flexible workspace industry. Notably, there's a significant increase in longer initial contract lengths, alongside stable or increased office occupancy rates. Furthermore, respondents anticipate stable or higher prices, reflecting market confidence. Optimism prevails regarding the industry's future, with a majority expressing positive sentiments, highlighting resilience and growth potential.





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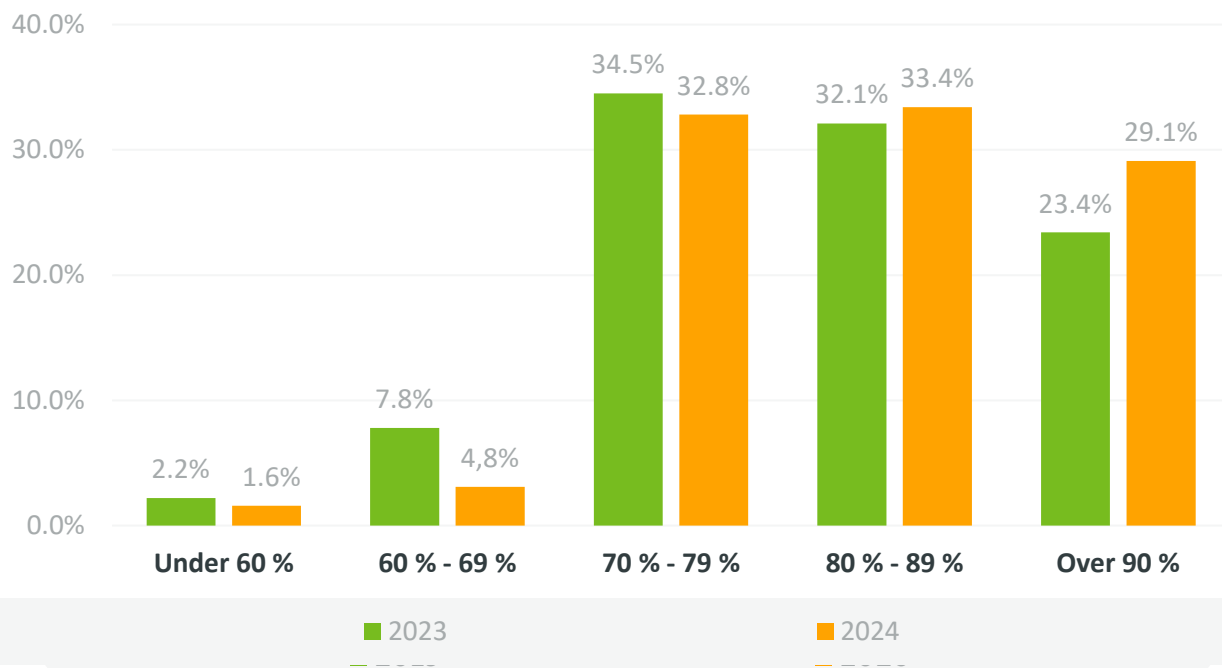
## AI impact on daily business operations and office workflow



In Germany, artificial intelligence plays a varied role in daily business operations and office workflow. While 36% experience a considerable impact, 35% note a minor influence. A smaller portion (17%) report a significant effect, while 12% indicate no influence at all.

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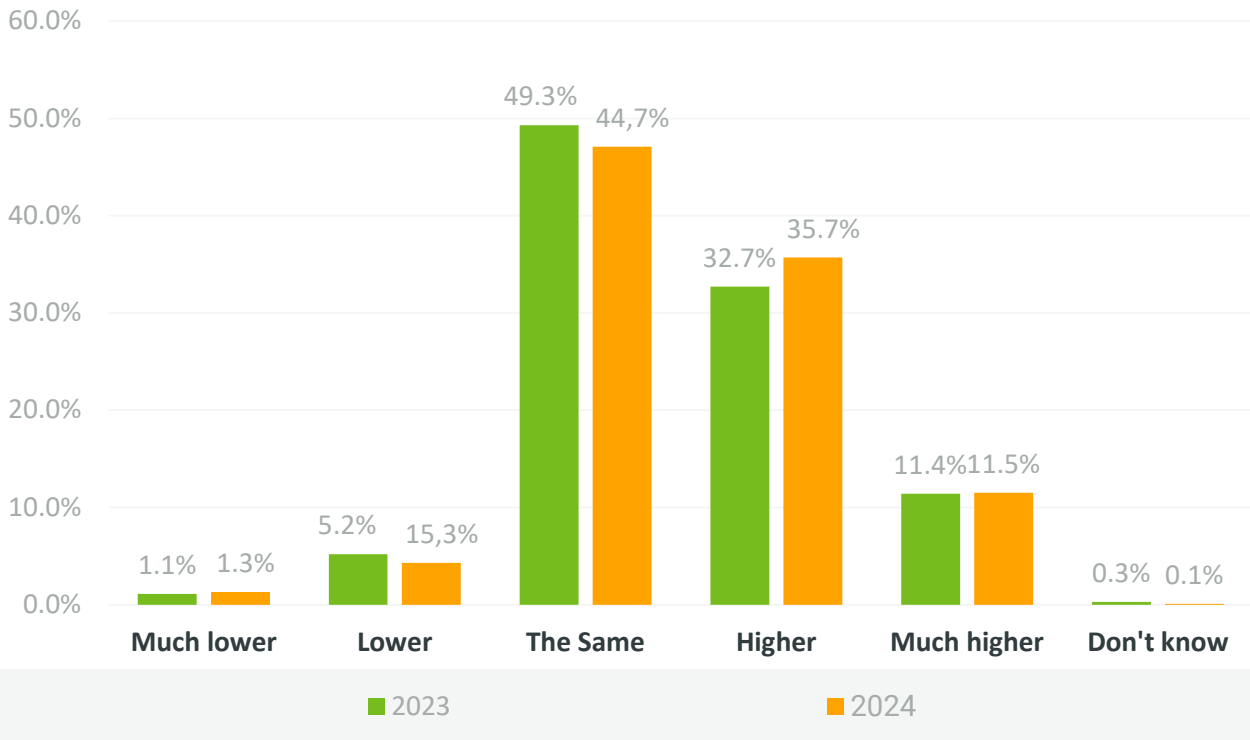
## Occupancy compared to last year



In 2024, office occupancy in Germany displays a shift. Spaces within the 70%-79% range accommodate 32.8%, while those within the 80%-89% range occupy 33.4%. Notably, over 90% occupancy rises significantly from 23.4% in 2023 to 29.1% in 2024.

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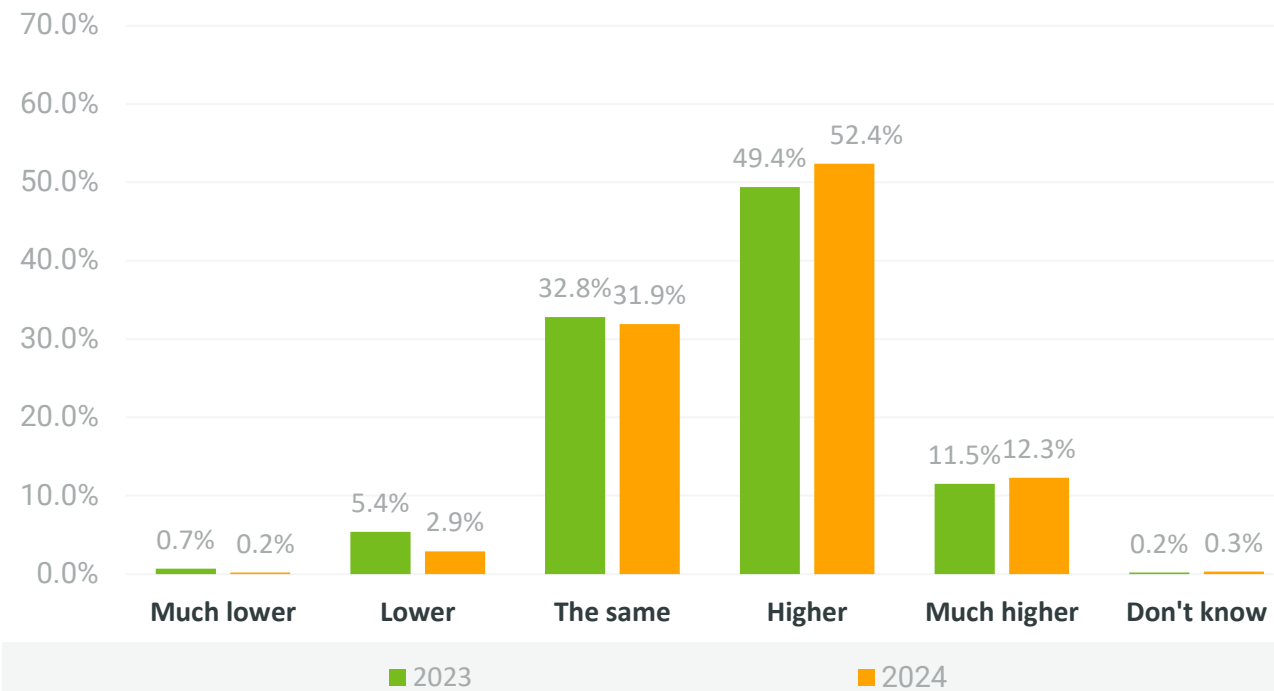
### Occupancy compared to last year



Comparing to last year, German occupancy remains relatively stable in 2024. While 44.7% report no change, 47.2% anticipate equal or increased occupancy. Notably, 11.5% foresee much higher occupancy, indicating a modest shift towards heightened utilization compared to the previous year's responses.

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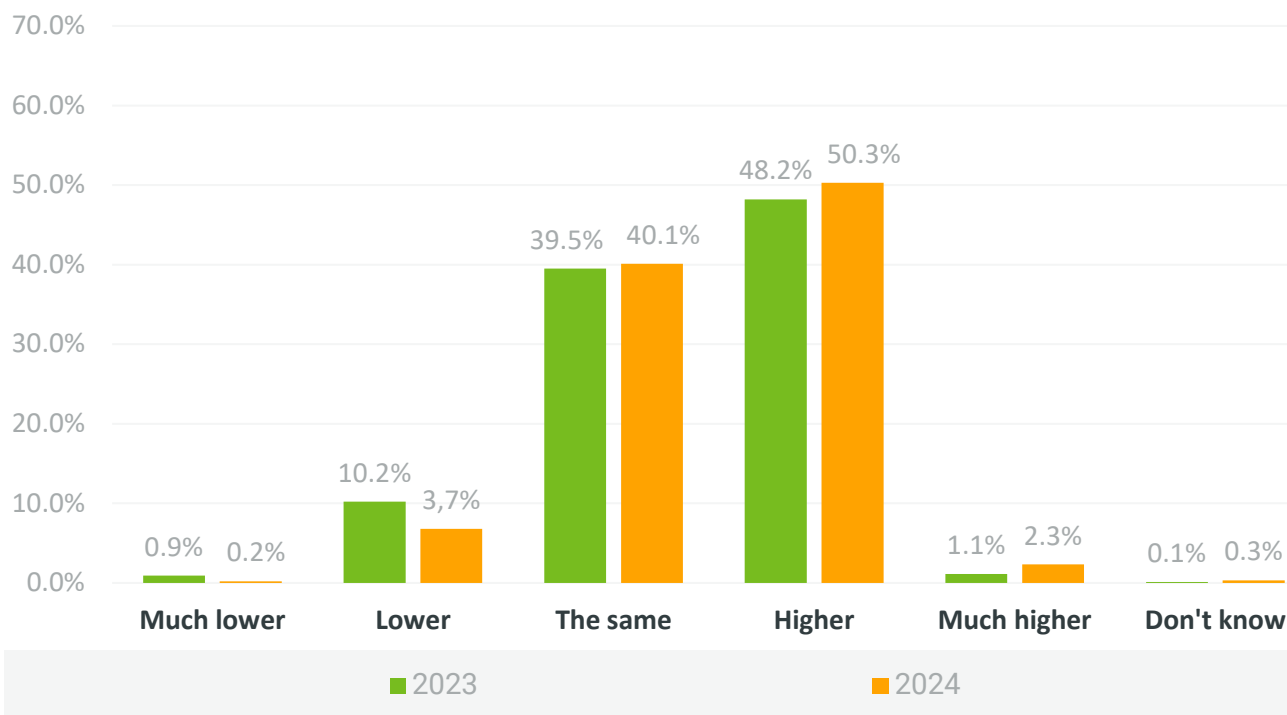
### Occupancy expectation in 6 months



In six months, German respondents anticipate a stable or increased occupancy trend. In 2024, the majority project equal or higher occupancy, with 12.3% foreseeing much higher levels, indicating continued confidence and optimism in workspace utilization.

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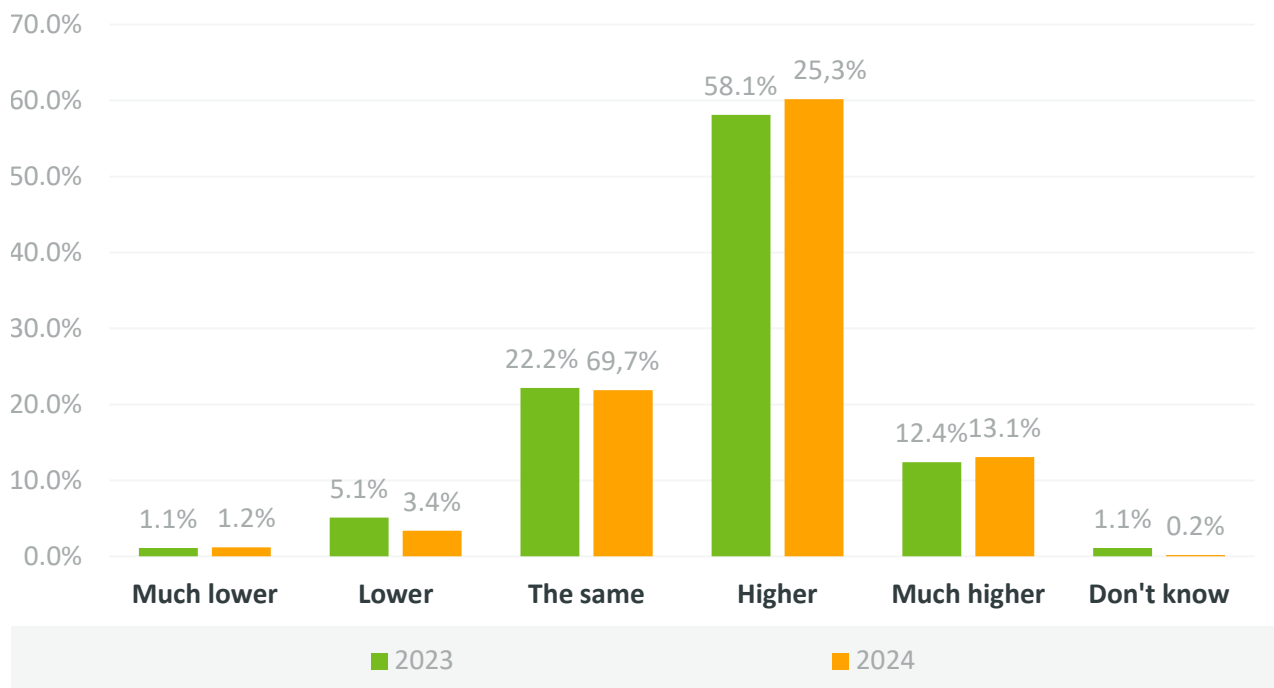
### Achieved prices for office contracts or workstations compared to last year



Reflecting on achievements, 2024 shows an upward trajectory in German office contract prices. Remarkably, 52.6% experienced the higher prices, compared to 49.3% in 2023. Notably, 2.3% reported much higher prices, indicating positive growth and market confidence.

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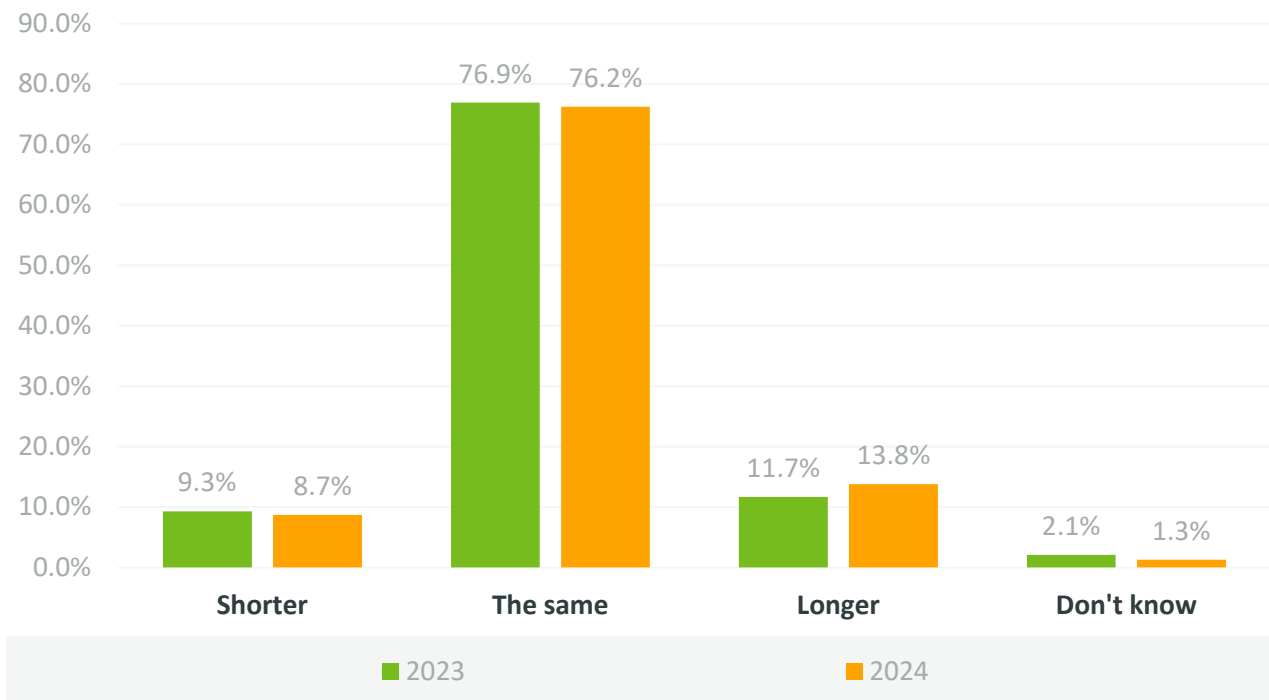
### Expected price level in 6 months



In the foreseeable future, German respondents foresee stability or an upward trend in price levels. In 2024, an overwhelming 81.3% anticipate unchanged or increased prices, with 13.1% envisioning a substantial rise.

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## Initial contract length compared to last year



In 2024, initial contract lengths in Germany show a slight increase in longer contracts compared to the previous year, rising from 11.7% to 13.8%. Meanwhile, the proportion of shorter or the same-length contracts remains consistent.

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## General outlook



Looking ahead, German respondents hold an optimistic outlook for the industry's future. In 2024, 78.8% express positivity, with 13.4% feeling very positive, suggesting confidence and optimism in the sector's growth and resilience.

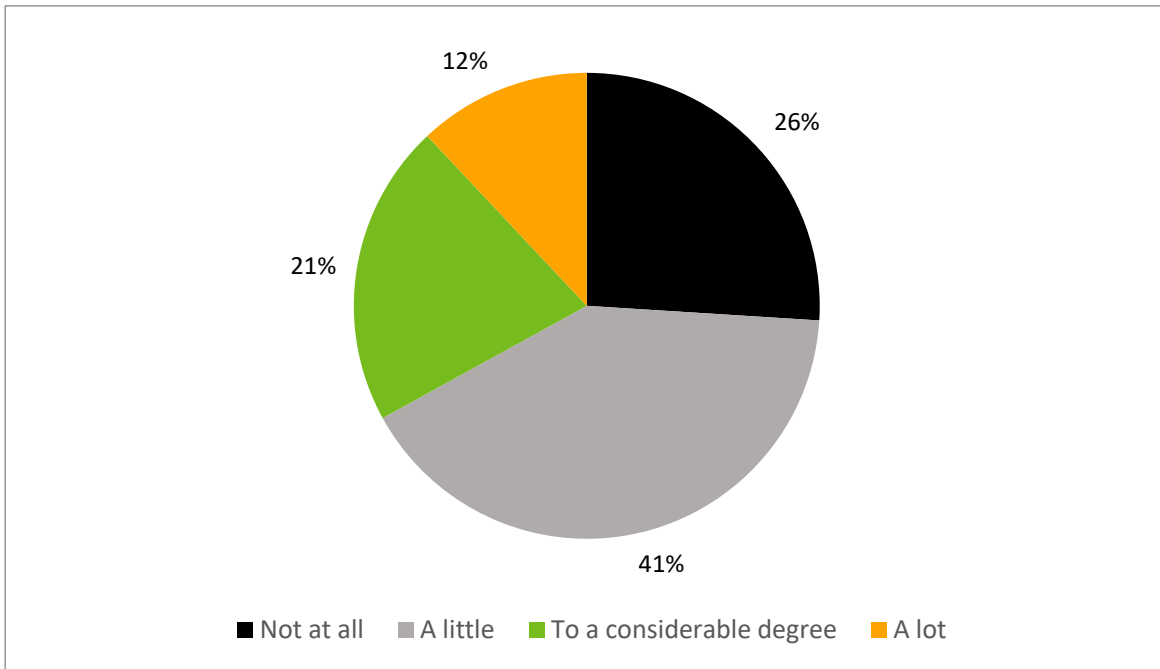
# Italy

In 2024, our Italian respondents portray a buoyant outlook across various facets of the industry. Noteworthy trends include stable office occupancy rates with a slight increase in longer contract lengths. Additionally, respondents anticipate steady or higher price levels, reflecting confidence in market stability. Optimism prevails regarding the industry's future, highlighting resilience and growth potential amidst evolving market dynamics.



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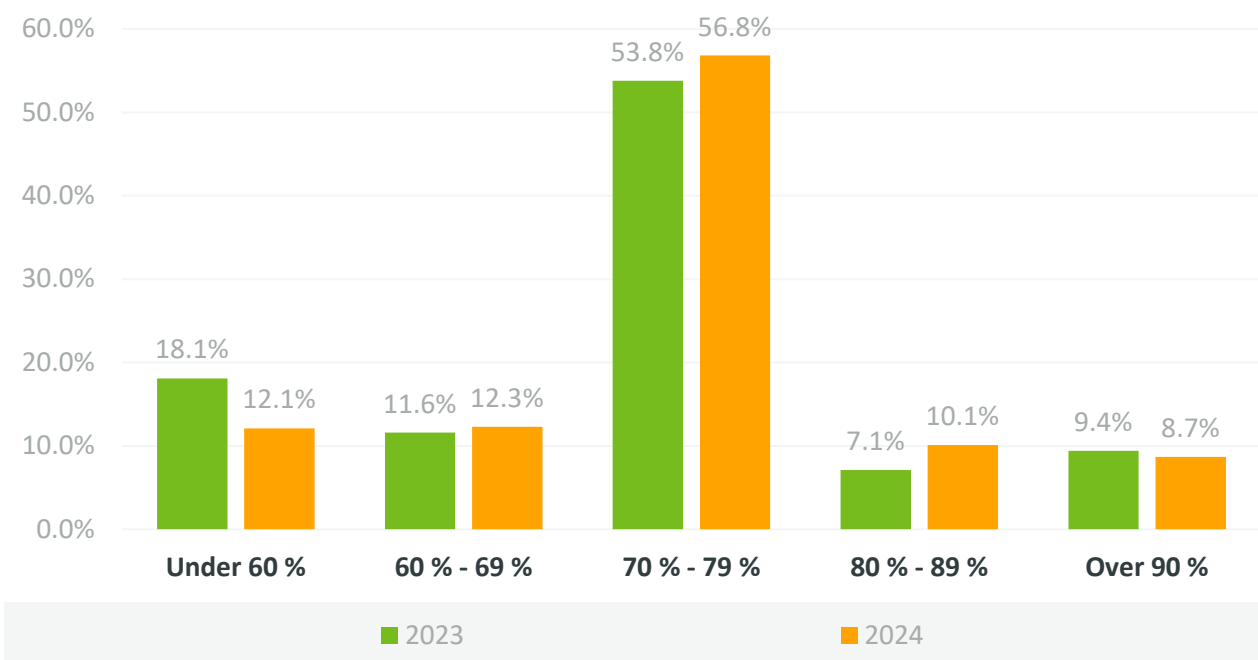
### AI impact on daily business operations and office workflow



In Italy, artificial intelligence has varying impacts on daily business operations and office workflow. While 41% experience a minor influence and 21% note a considerable impact, only 12% report a significant effect, with 26% indicating no influence at all.

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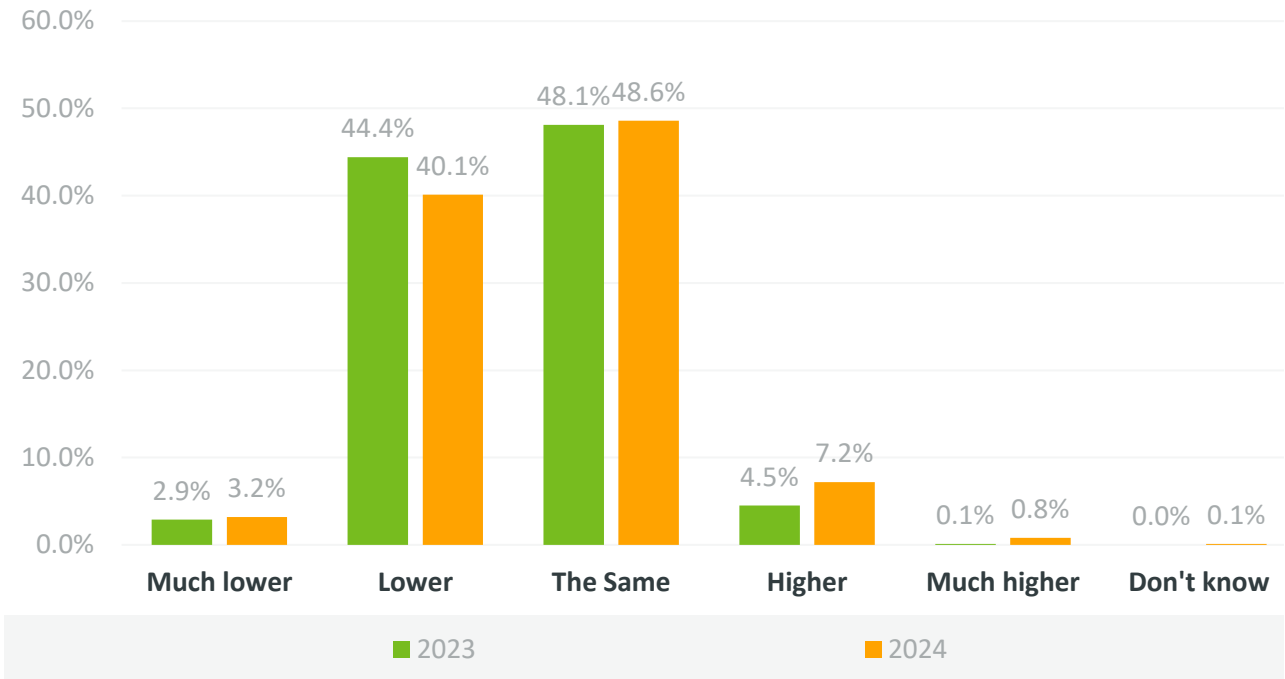
### Occupancy compared to last year



In Italy, office occupancy distribution shows stability in 2024. The majority, 56.8%, falls within the 70%-79% range, with minimal shifts in other categories compared to 2023, indicating consistency in workspace utilization patterns.

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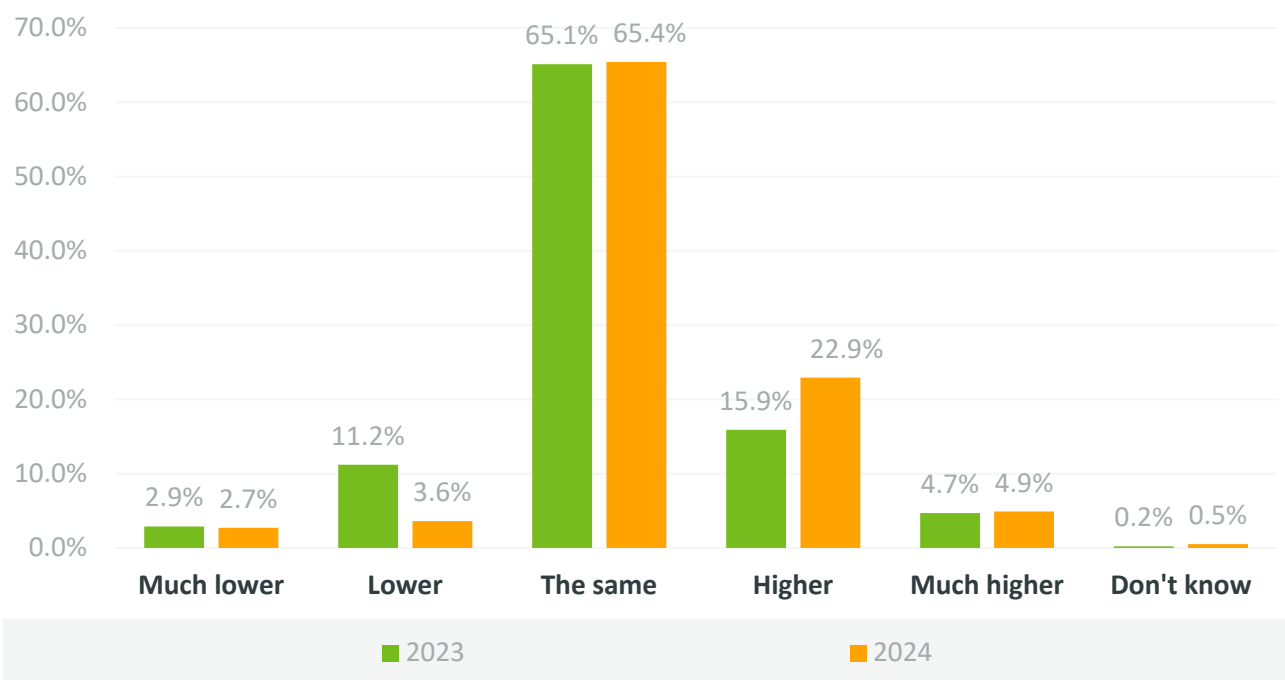
### Occupancy compared to last year



Compared to last year, Italian occupancy remains relatively stable in 2024, with a slight increase in higher occupancy levels. Notably, 48.6% report no change, while 7.2% indicate higher occupancy.

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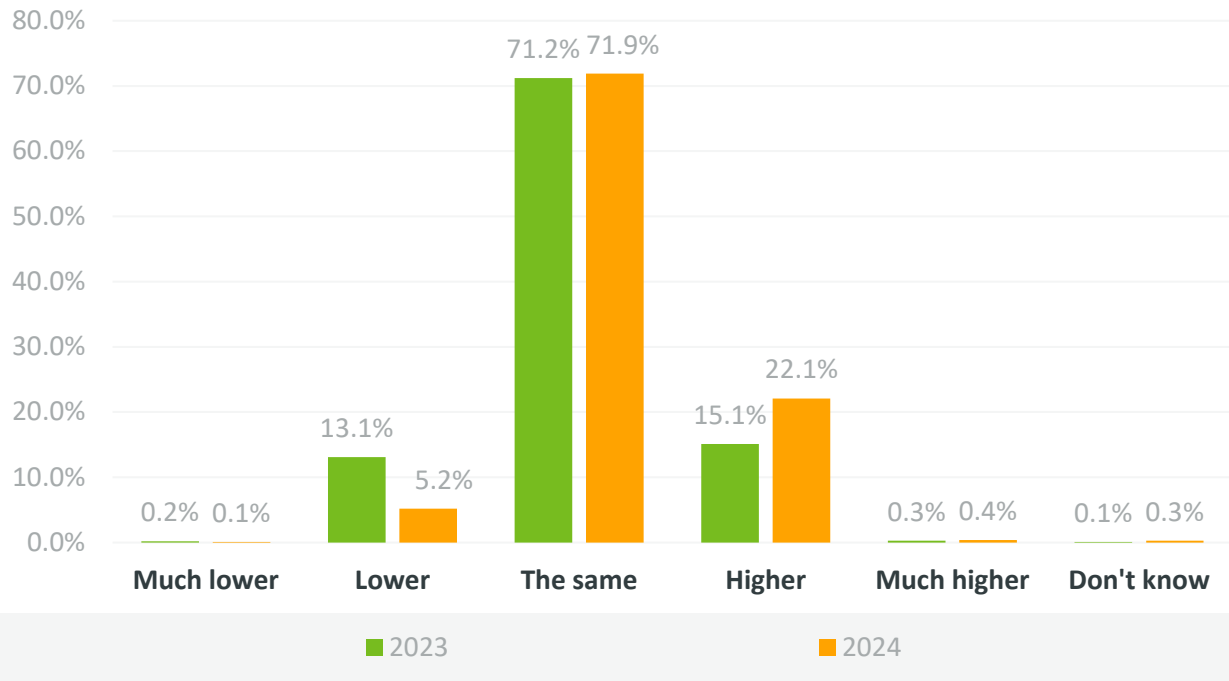
### Occupancy expectation in 6 months



In six months, Italian respondents expect relatively stable occupancy levels. In 2024, 93.3% anticipate the same or higher occupancy, with 27.8% foreseeing increased levels, suggesting confidence in sustained or improved workspace utilization.

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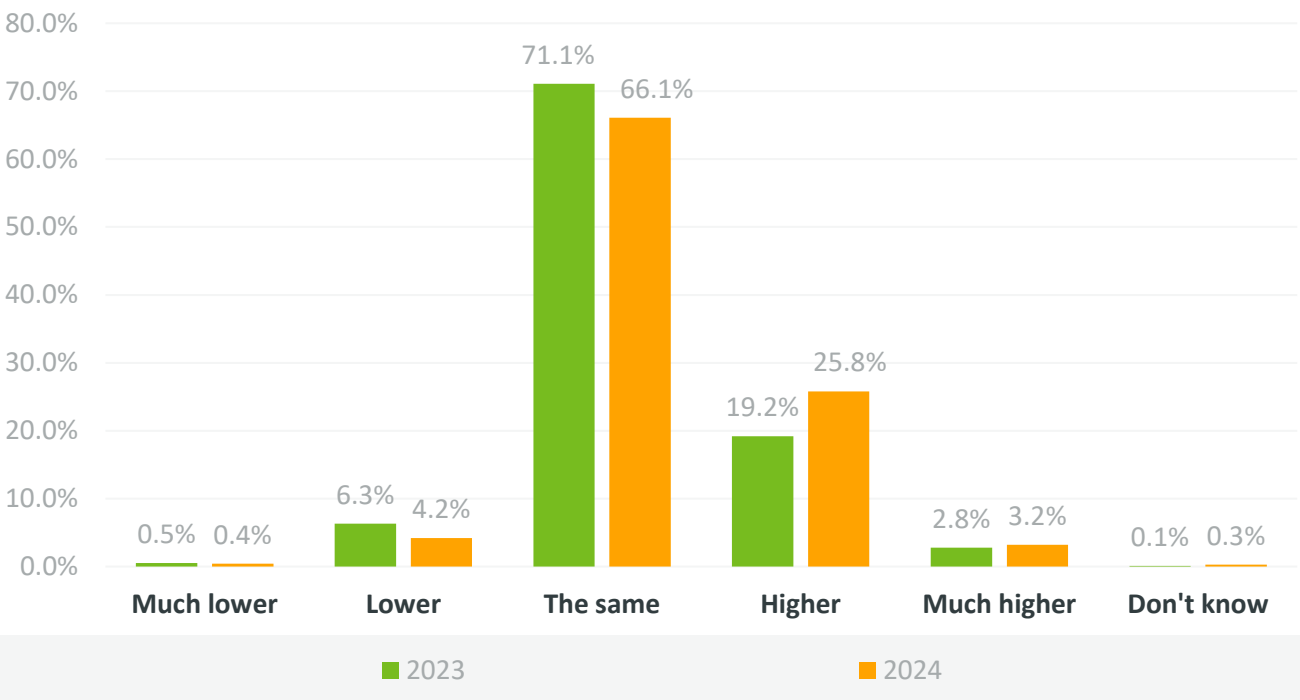
### Achieved prices for office contracts or workstations compared to last year



In Italy, office contract prices demonstrate a notable increase in 2024, with 94.4% experiencing the same or higher prices compared to 86.7% in 2023. Notably, 22.5% report higher prices, reflecting a positive trend in the market.

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### Expected price level in 6 months

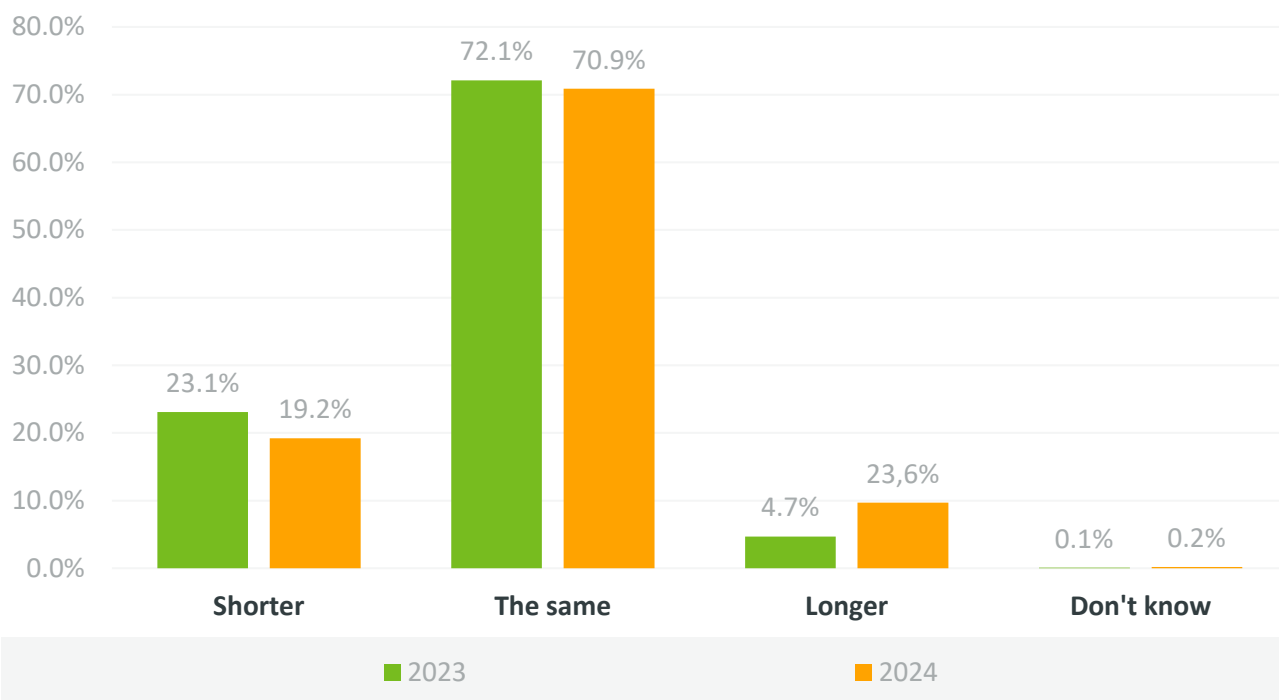


In the next six months, Italian respondents anticipate stable or higher price levels. In 2024, 95.1% foresee the same or increased prices, with 29% expecting higher prices, indicating optimism and confidence in the market's pricing stability and potential



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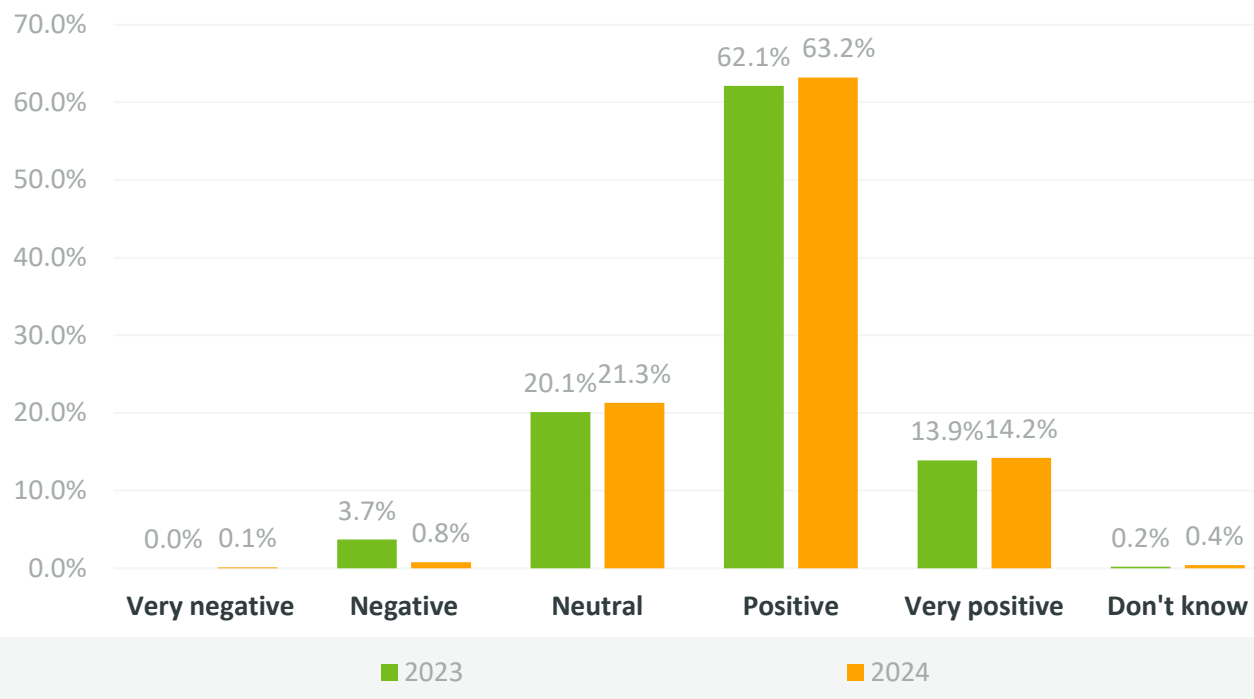
### Initial contract length compared to last year



In Italy, initial contract lengths show a slight increase in longer contracts in 2024, rising to 9.7% compared to 4.7% in 2023. Meanwhile, the proportion of shorter or the same-length contracts remains consistent.

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### General outlook



Italian respondents express a positive outlook on the future of the industry in 2024. Notably, 77.4% hold positive or very positive sentiments, showcasing optimism and confidence in the industry's growth and resilience.

# The Netherlands

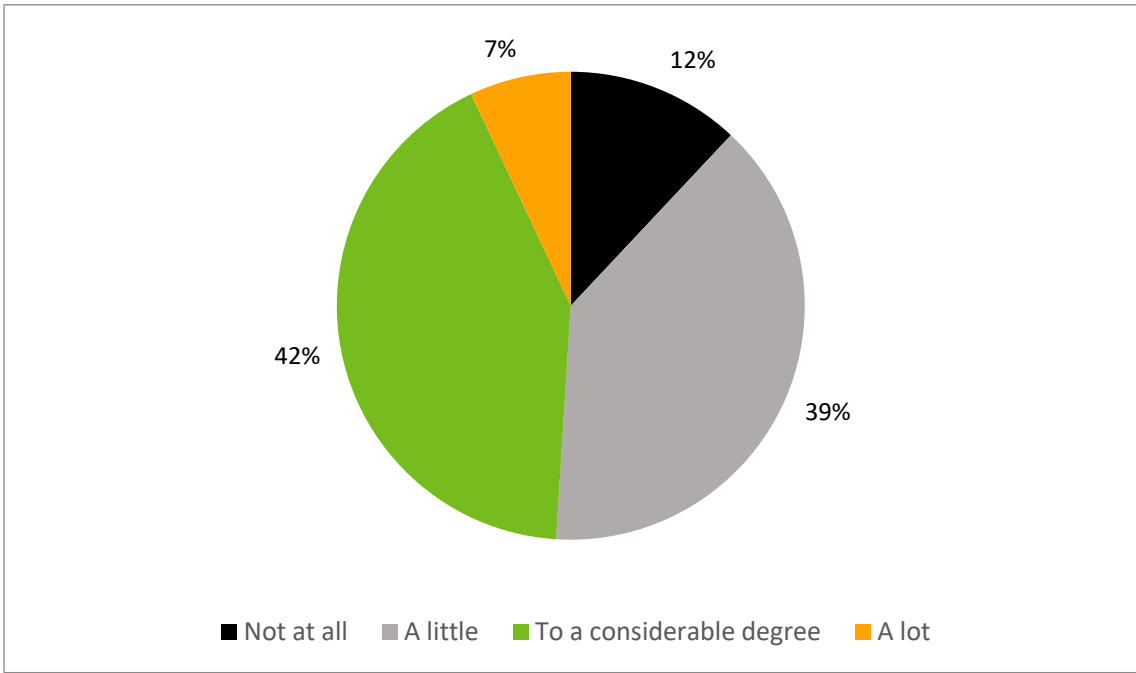
In 2024, our respondents reveal a promising landscape for flexible workspaces. Artificial intelligence increasingly influences daily operations, with a considerable 42% acknowledging its impact. Office occupancy trends show stability, while contract lengths trend towards longer durations.

Moreover, optimism prevails regarding pricing and industry outlook, reflecting confidence in future growth and market stability.



1

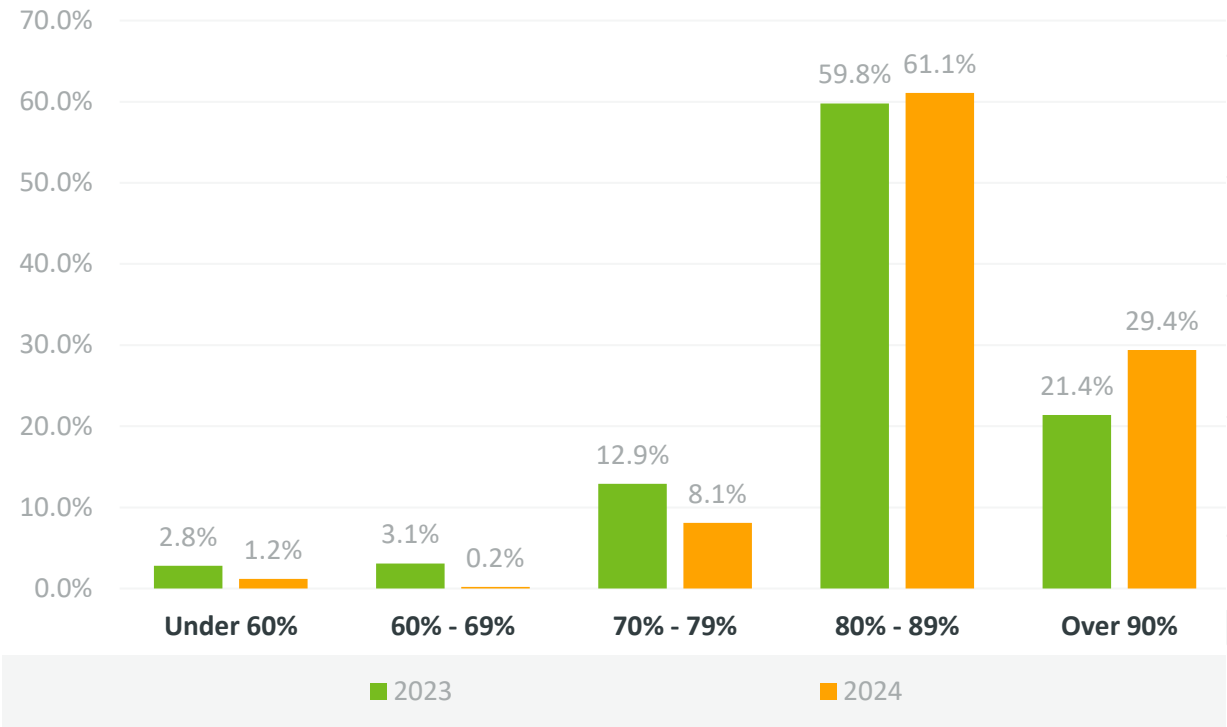
### AI impact on daily business operations and office workflow



In the Netherlands, artificial intelligence has notably impacted daily business operations and office workflow. A considerable 42% report a significant influence, while 39% note a moderate impact. A smaller portion, 7%, experience a substantial effect, contrasting with 12% who report no influence at all.

2

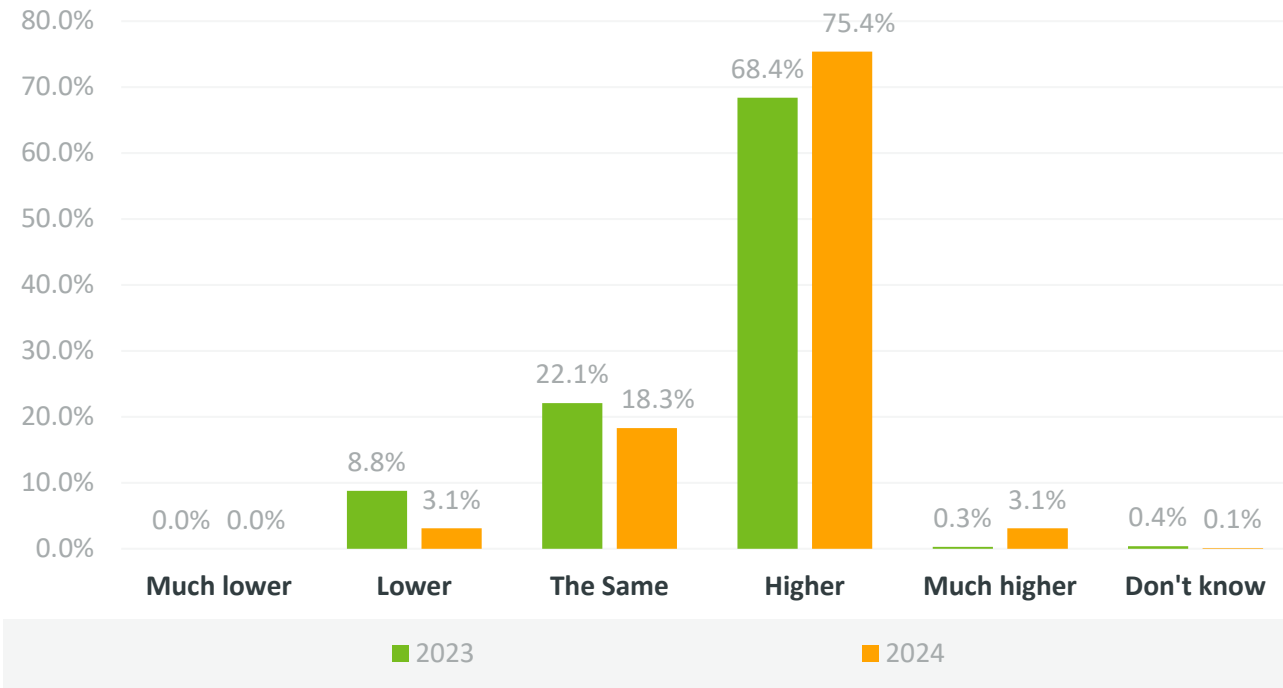
### Average office occupancy



In 2024, the Netherlands witnesses a significant shift in office occupancy patterns, with a notable 29.4% of spaces experiencing over 90% occupancy, indicating a high demand for workspace utilization compared to 2023's figures.

3

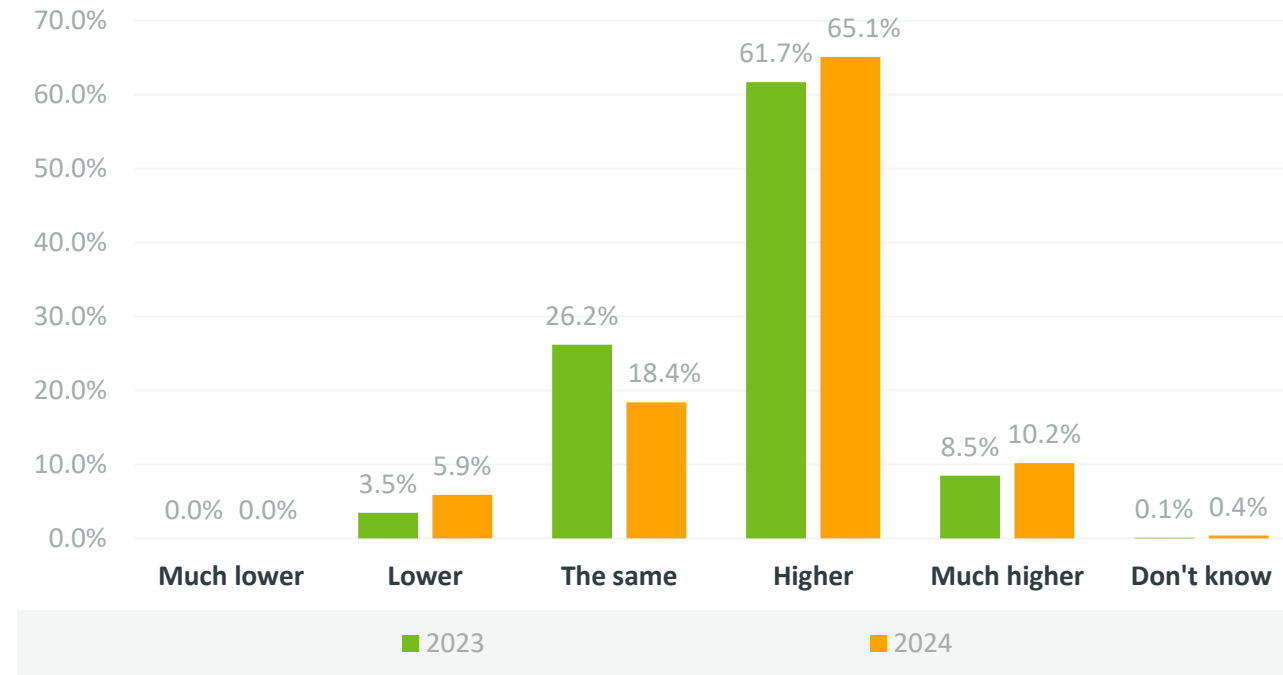
Occupancy expectation in 6 months



Compared to last year, the Netherlands sees a substantial increase in office occupancy in 2024, with 75.4% reporting higher levels. This contrasts with 2023, where only 22.1% reported the same level of occupancy, indicating a significant upward trend.

4

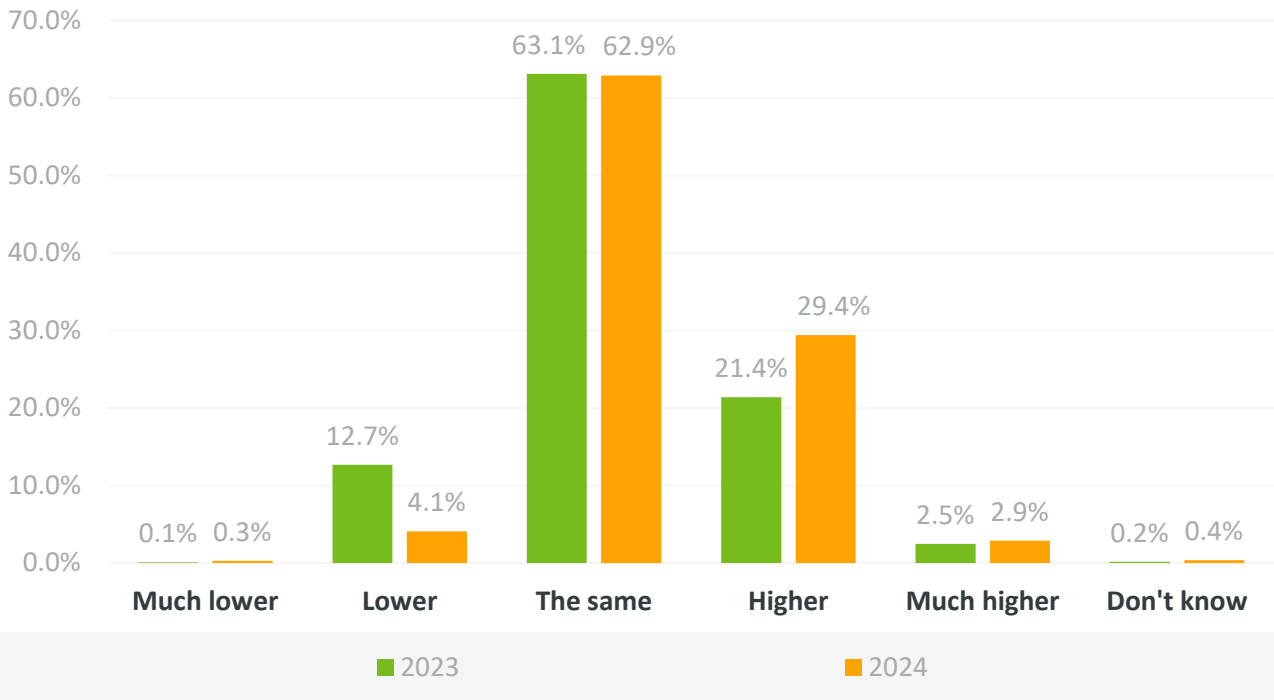
Occupancy expectation in 6 months



Looking ahead, Netherlands respondents project a positive outlook for office occupancy in the next six months. In 2024, 75.3% anticipate the same or higher levels, with 65.1% expecting higher occupancy.

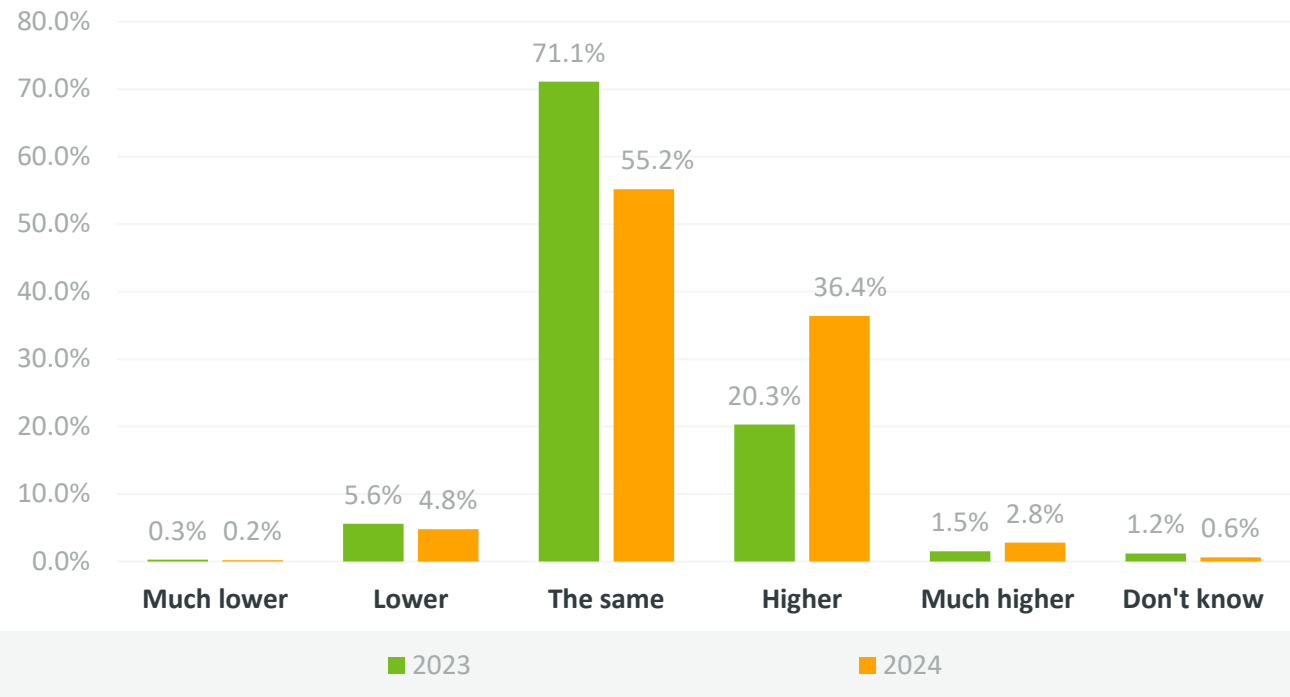
5

### Achieved prices for office contracts or workstations compared to last year



In the Netherlands, there is a notable increase in achieved prices for office contracts or workstations in 2024, with 92.3% reporting the same or higher prices compared to 84.5% in 2023. This trend suggests market stability and potential growth.

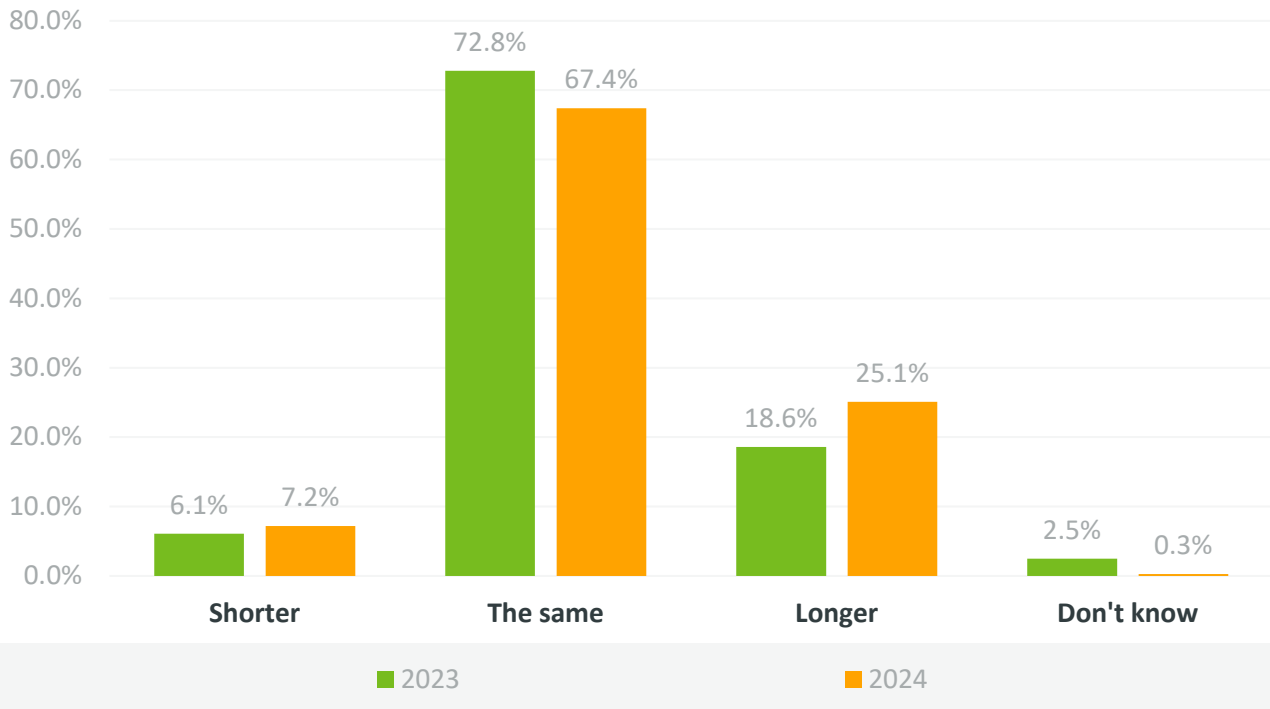
6



Looking forward, respondents in the Netherlands project a varied outlook for office contract prices in the next six months. In 2024, 94.4% anticipate stable or higher prices, with 39.2% expecting an increase, suggesting optimism in the market.

7

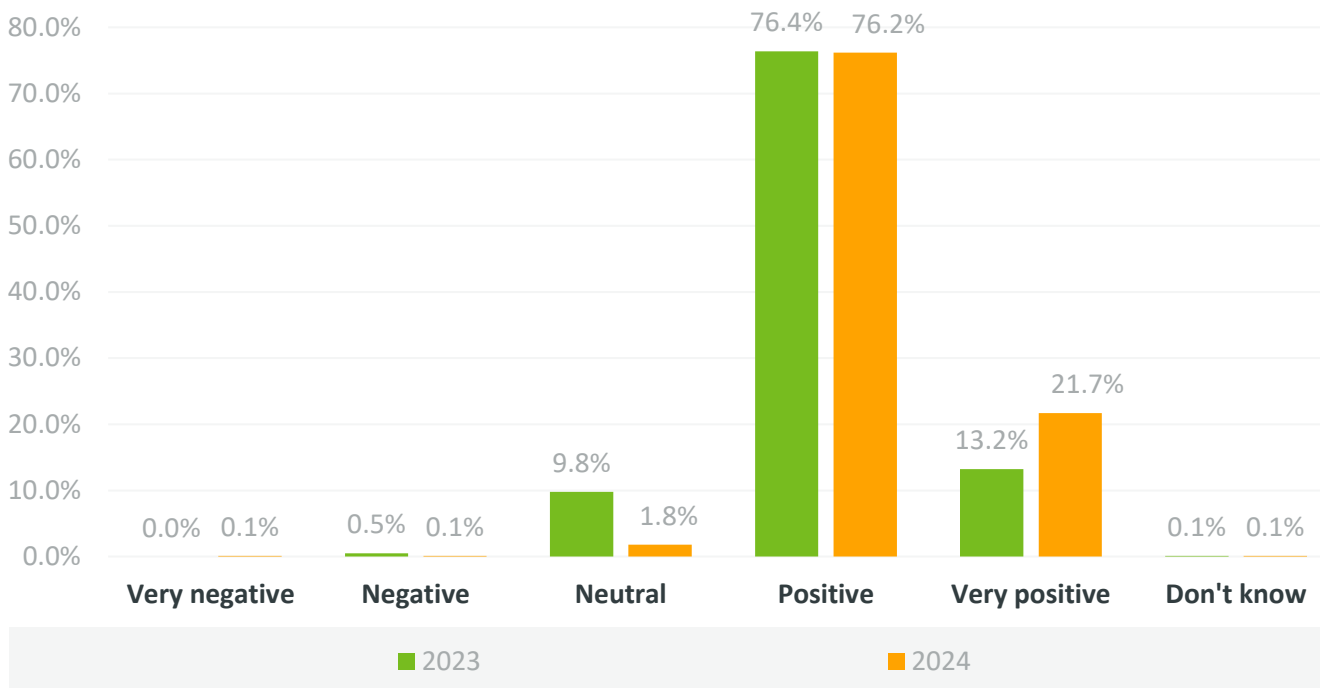
## Initial contract length compared to last year



Initial contract lengths in the Netherlands demonstrate a noteworthy shift in 2024. Longer contracts rise to 25.1%, a marked increase from 18.6% in 2023, while shorter or the same-length contracts maintain stability.

8

## General outlook



Respondents in the Netherlands hold a positive outlook for the future of the industry in 2024, with 97.9% expressing positivity or neutrality, marking a slight increase in very positive sentiment compared to 2023.

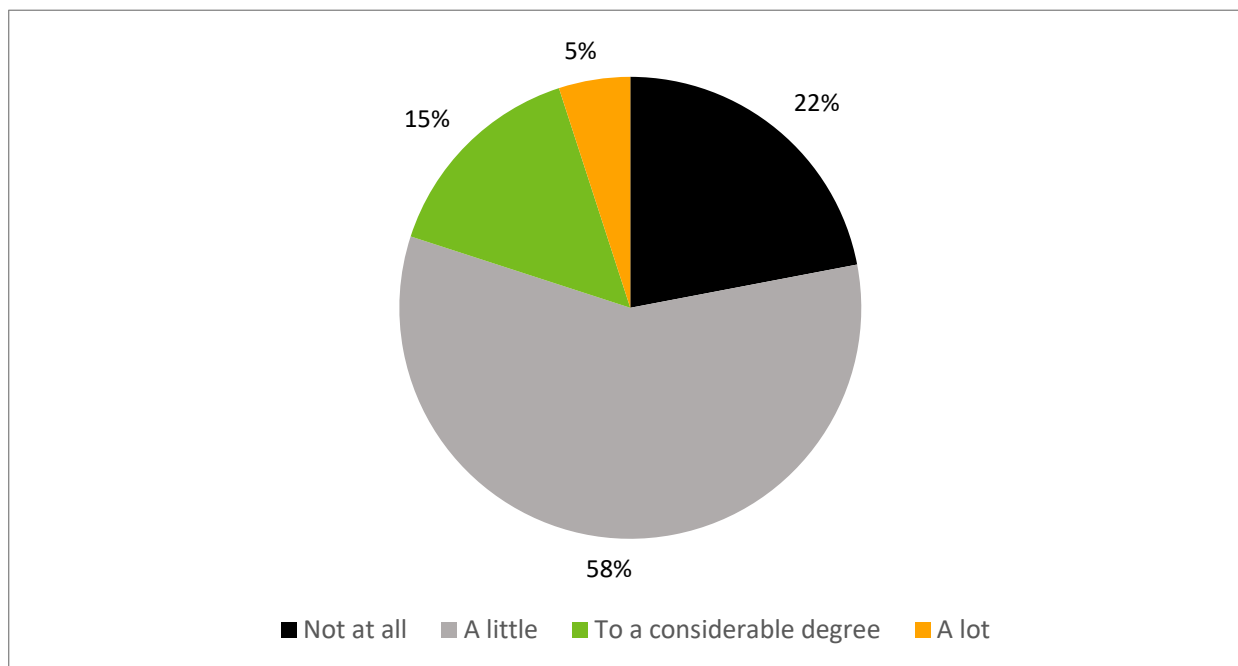
# Spain

In 2024, Spain's workspace landscape witnesses the nuanced influence of artificial intelligence on daily operations, alongside stable office occupancy rates. Noteworthy shifts in contract lengths and pricing expectations underscore a dynamic industry poised for growth. Overall, Spain's workspace sector reflects an optimistic outlook, signaling resilience and adaptability amidst evolving trends and technological advancements.



1

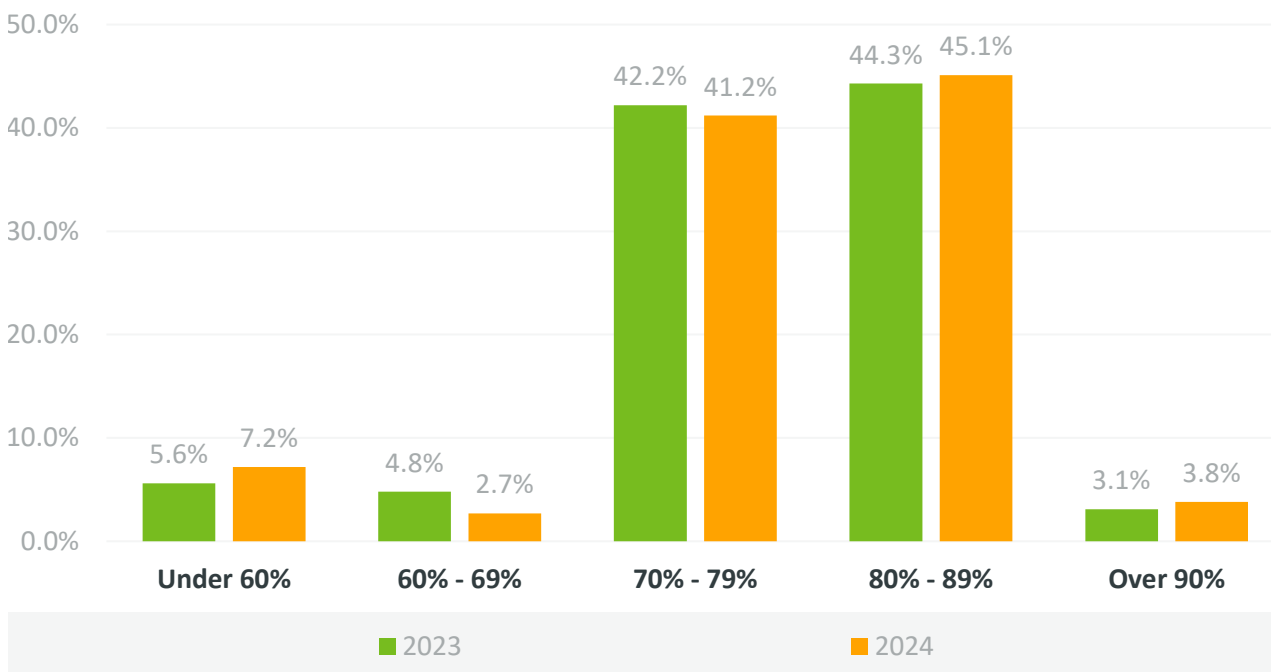
### AI impact on daily business operations and office workflow



In 2024, responses from Spain indicate varied impacts of artificial intelligence on daily business operations and office workflow. While 22% report no influence, 58% note minor effects, 15% observe considerable impact, and 5% experience significant changes, emphasizing the growing integration of AI technologies in workspace management.

2

### Average office occupancy

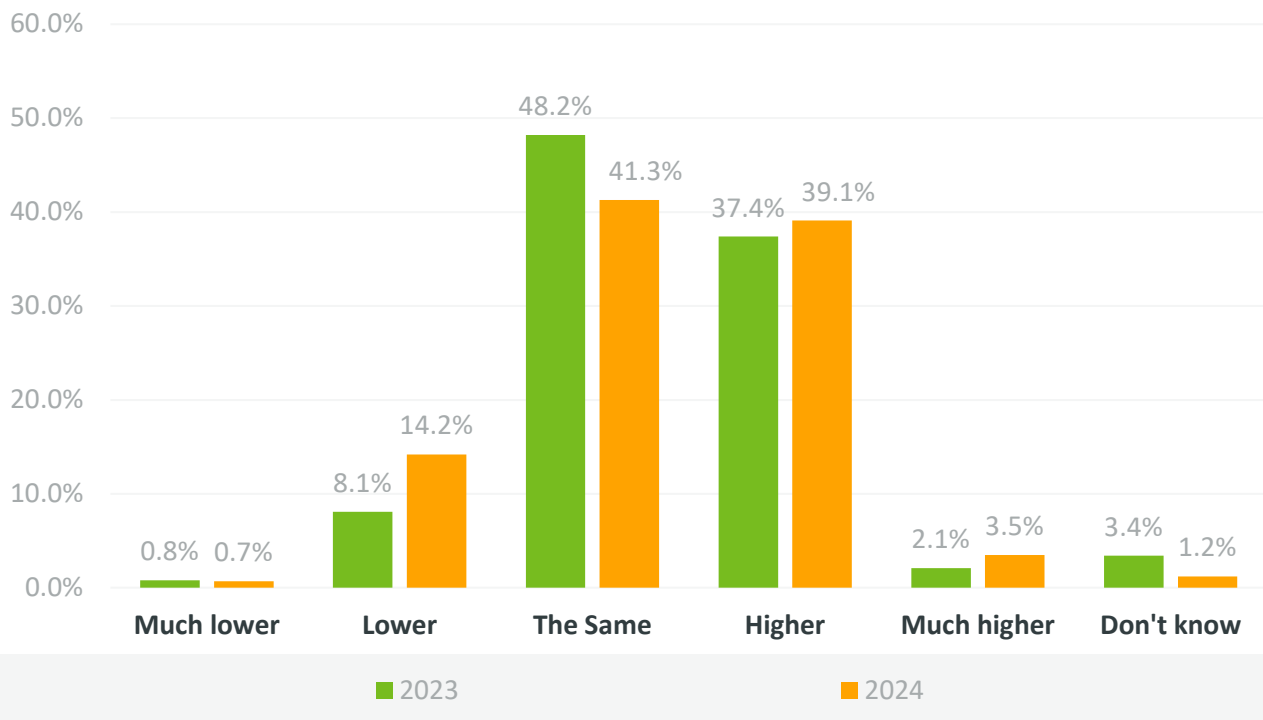


In 2024, Spain’s average office occupancy demonstrates stability, with 7.2% below 60%, 2.7% in the 60-69% range, 41.2% in the 70-79% bracket, 45.1% in the 80-89% category, and 3.8% exceeding 90%, mirroring trends from the previous year.



3

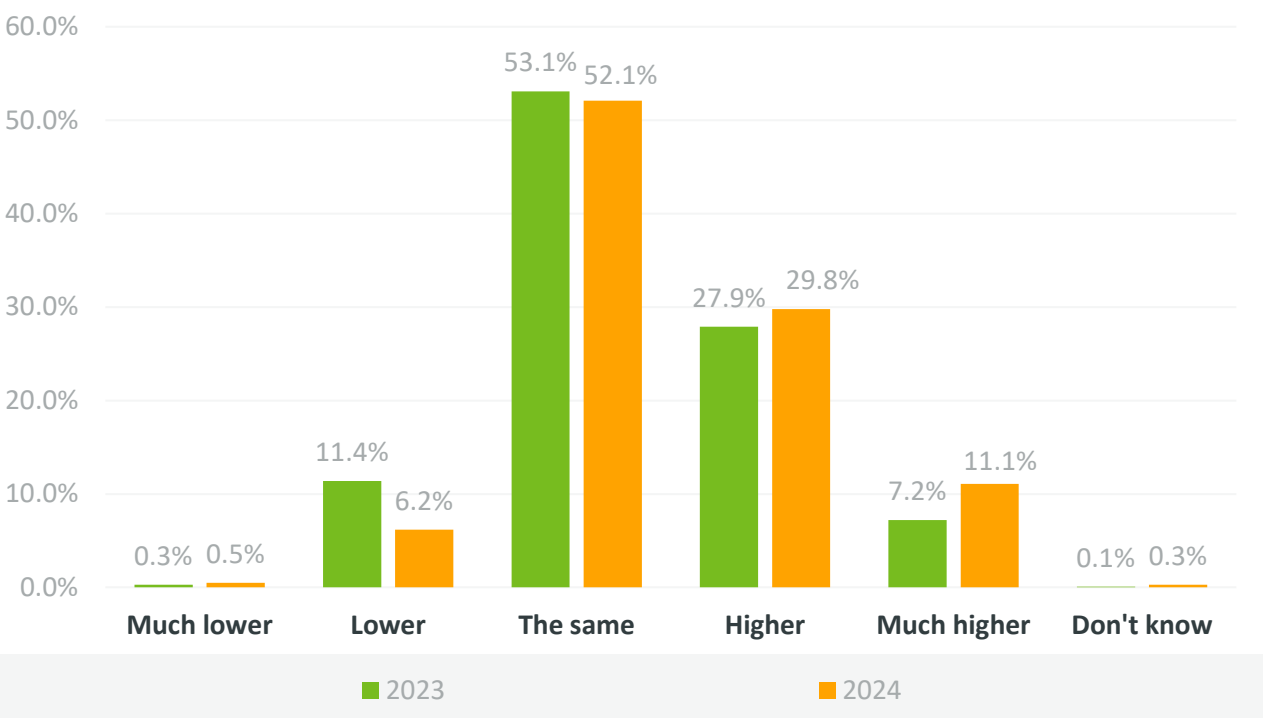
### Occupancy compared to last year



Comparing to the previous year, Spain's office occupancy in 2024 sees a slight decrease in the "Same" category (from 48.2% to 41.3%) and a notable rise in the "Higher" category (from 37.4% to 39.1%).

4

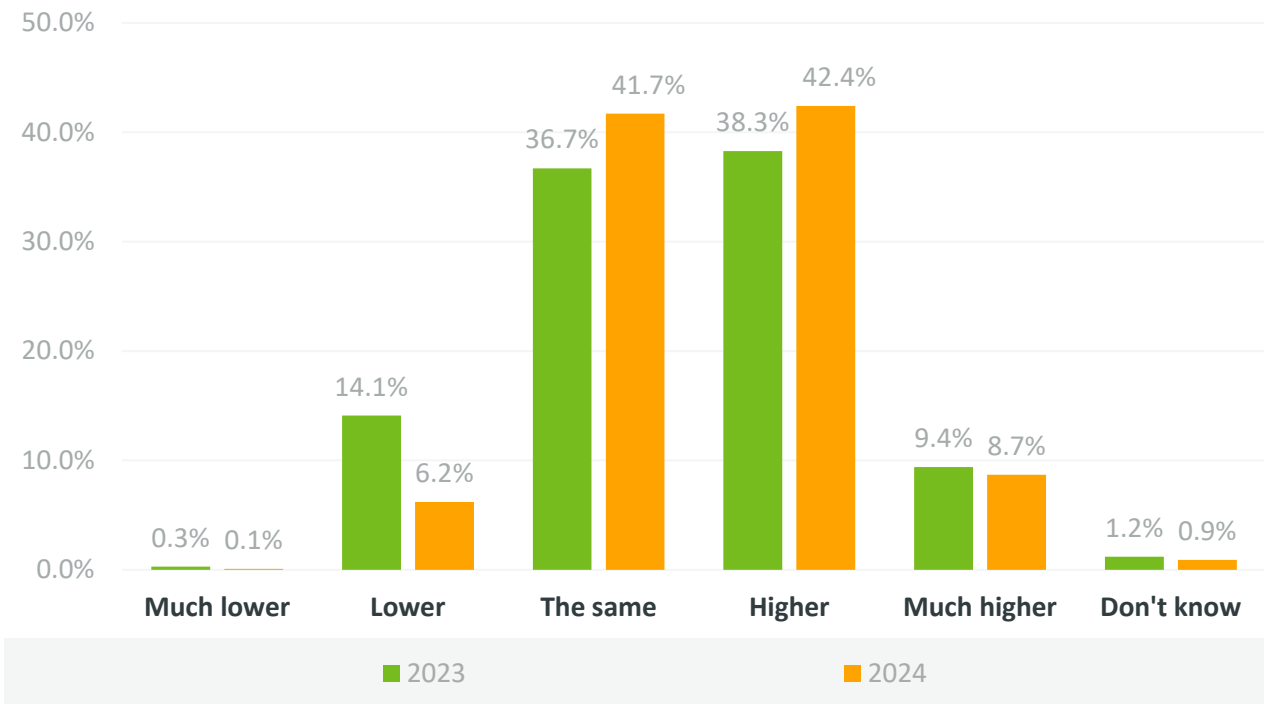
### Occupancy expectation in 6 months



Anticipating the future, Spain's occupancy expectations for the next 6 months in 2024 show a slight decrease in the "Lower" category (from 11.4% to 6.2%) and an increase in the "Much higher" category (from 7.2% to 11.1%).

5

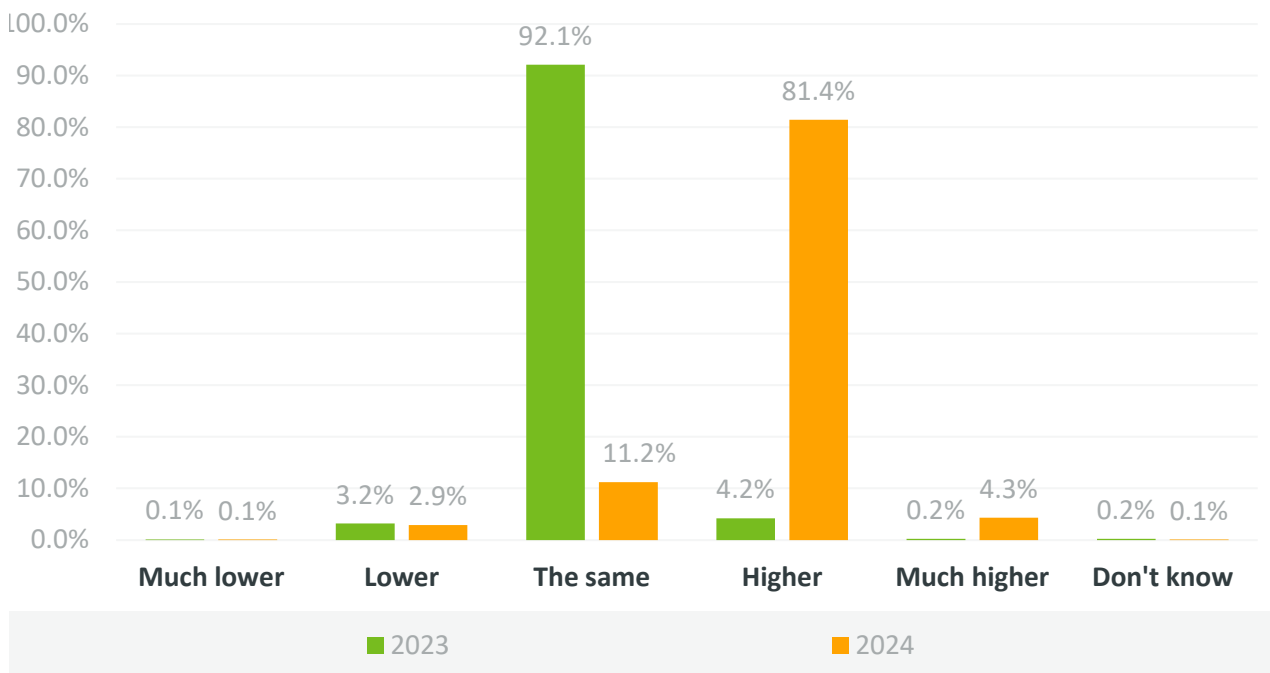
### Achieved prices for office contracts or workstations compared to last year



Reflecting on pricing trends, Spain’s office contracts or workstation prices in 2024 remained relatively stable compared to the previous year, with slight reductions in the “Lower” category (from 14.1% to 6.2%) and increases in both “Higher” and “Much higher” categories.

6

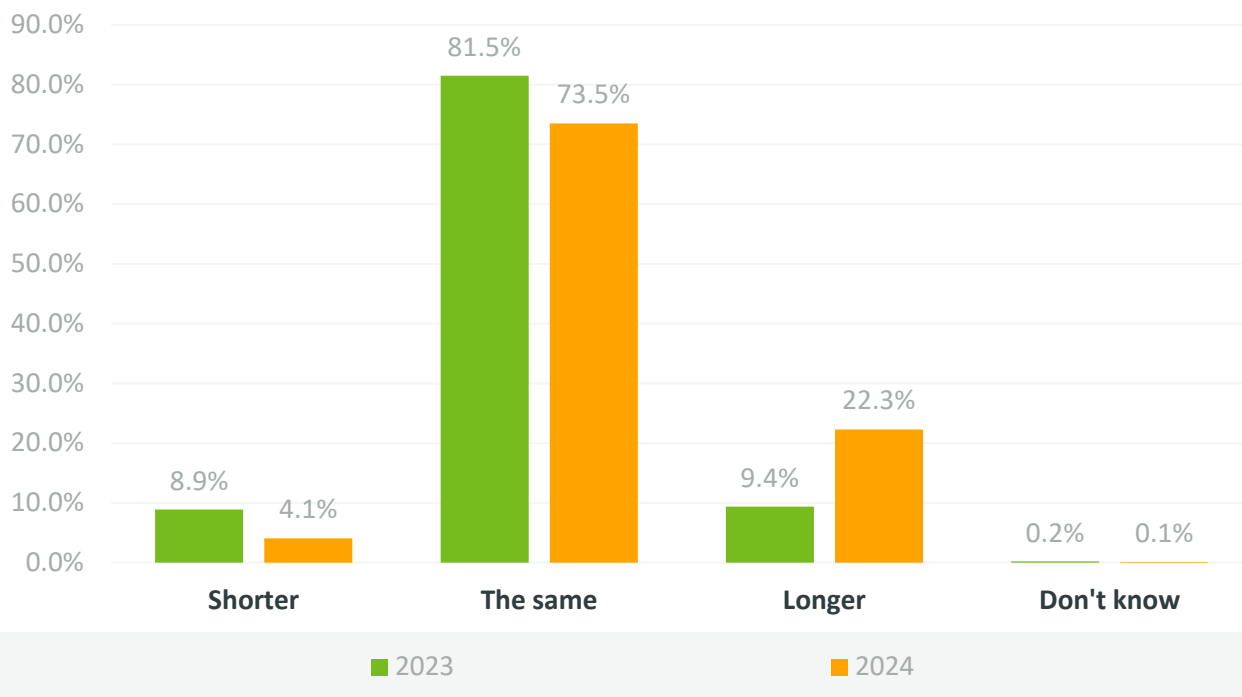
### Expected price level in 6 months



In Spain, the anticipated price level in the next six months shows a significant shift in expectations. While 92.1% expected prices to remain the same in 2023, only 11.2% held the same anticipation in 2024, with a notable increase in the “Higher” category.

7

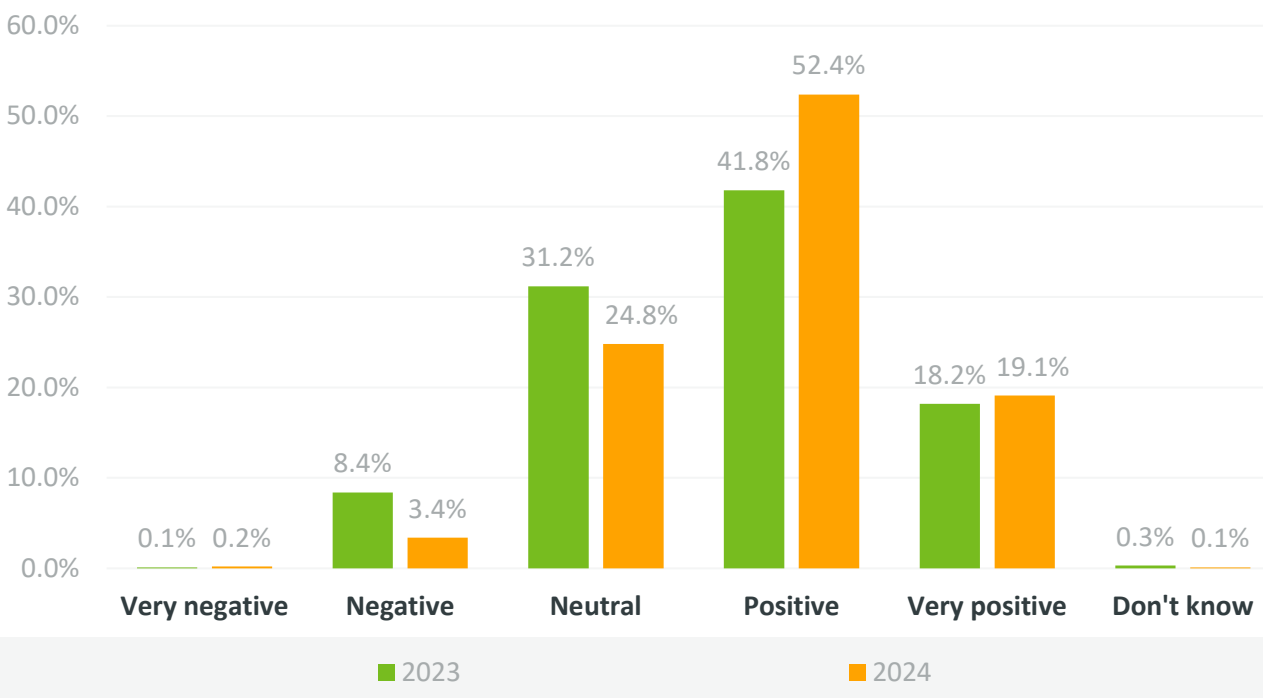
### Initial contract length compared to last year



In Spain, initial contract lengths in 2024 saw a notable shift compared to 2023, with a decrease in “Shorter” contracts and a significant increase in “Longer” contracts. This suggests a trend towards longer-term commitments among workspace providers.

8

### General outlook



In 2024, the industry outlook in Spain appears notably optimistic, with a majority of respondents expressing positivity or very positivity. The decrease in negative sentiments suggests growing confidence in the future of the industry.

# Sweden

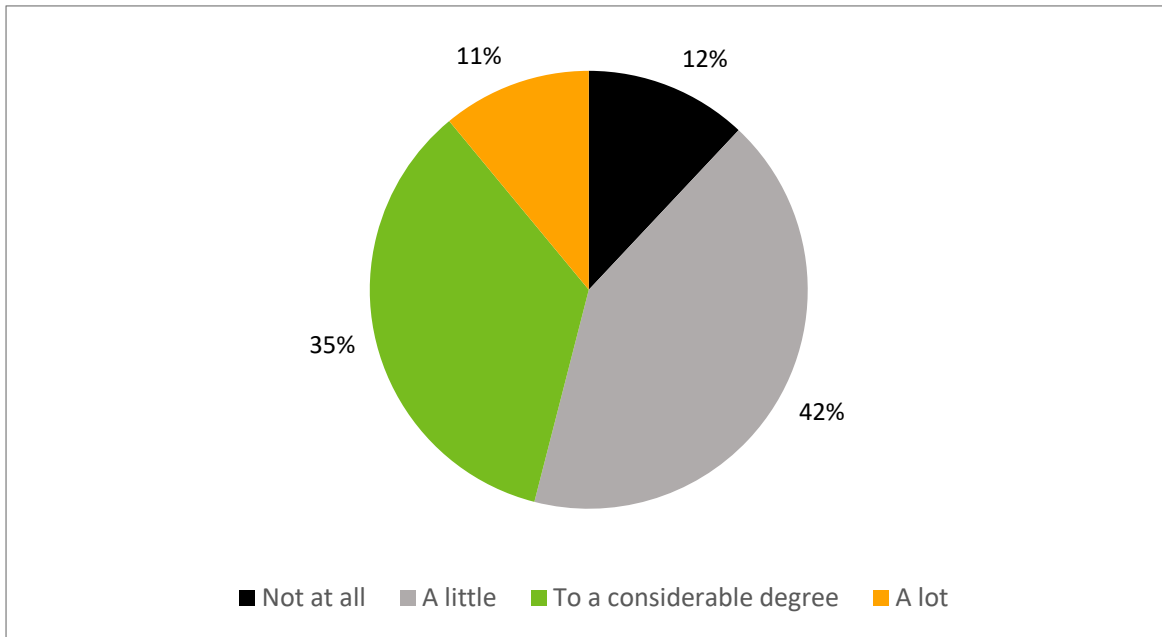
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In 2024, Sweden's office occupancy remains stable, mirroring trends from the previous year. While initial contract lengths show a slight increase in longer agreements, expectations for future occupancy see a minor decrease in those anticipating the same levels.

Prices for office contracts or workstations see little change, with optimism prevailing in the industry outlook, indicating sustained confidence and stability.

1

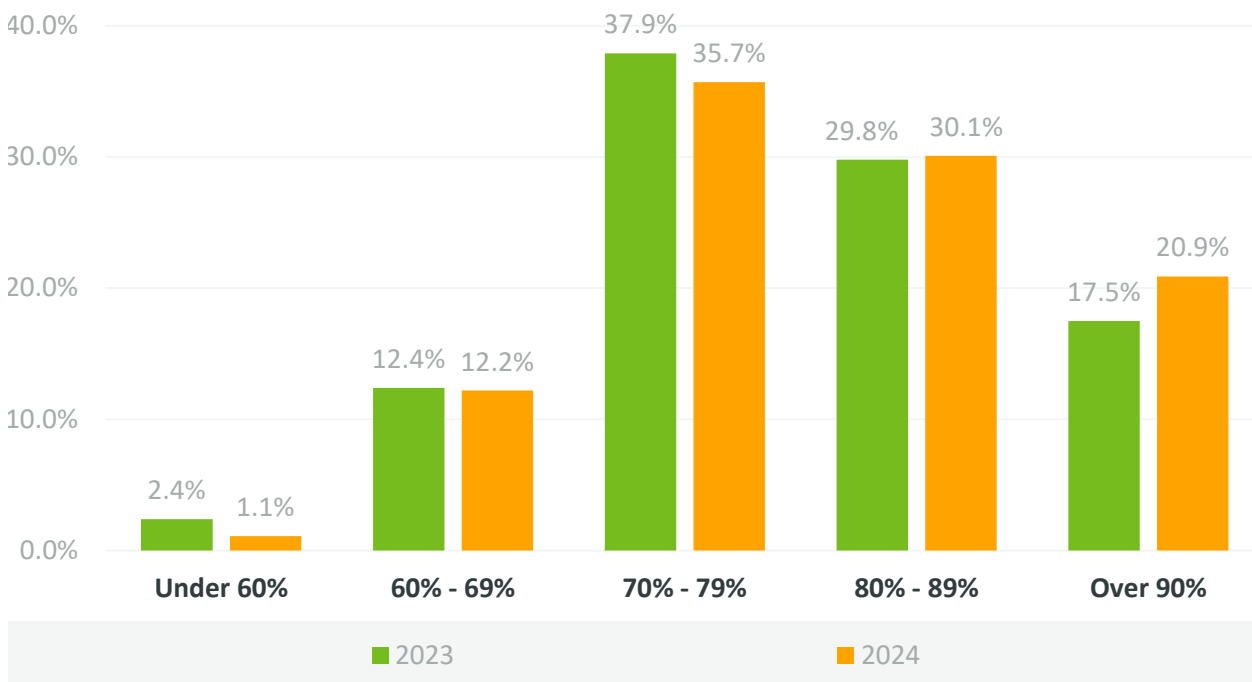
### AI impact on daily business operations and office workflow



In the Swedish responses of 2024, artificial intelligence notably impacted office workflow. While 12% reported no effect, 42% mentioned a minor impact, 35% noted a considerable influence, and 11% experienced a significant effect, highlighting the varied degrees of AI integration.

2

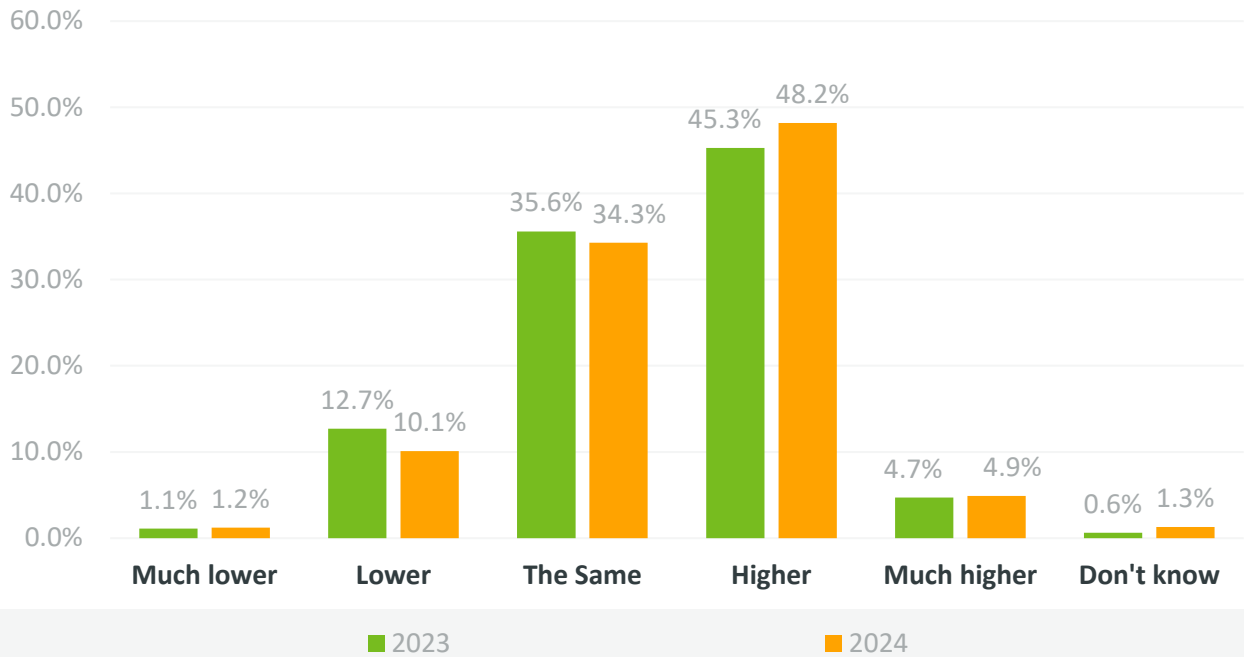
### Average office occupancy



In Sweden, the average office occupancy in 2024 reflects a stable distribution, with 1.1% below 60%, 12.2% in the 60-69% range, 35.7% occupying 70-79% of space, 30.1% utilizing 80-89% of capacity, and 20.9% exceeding 90% occupancy.

3

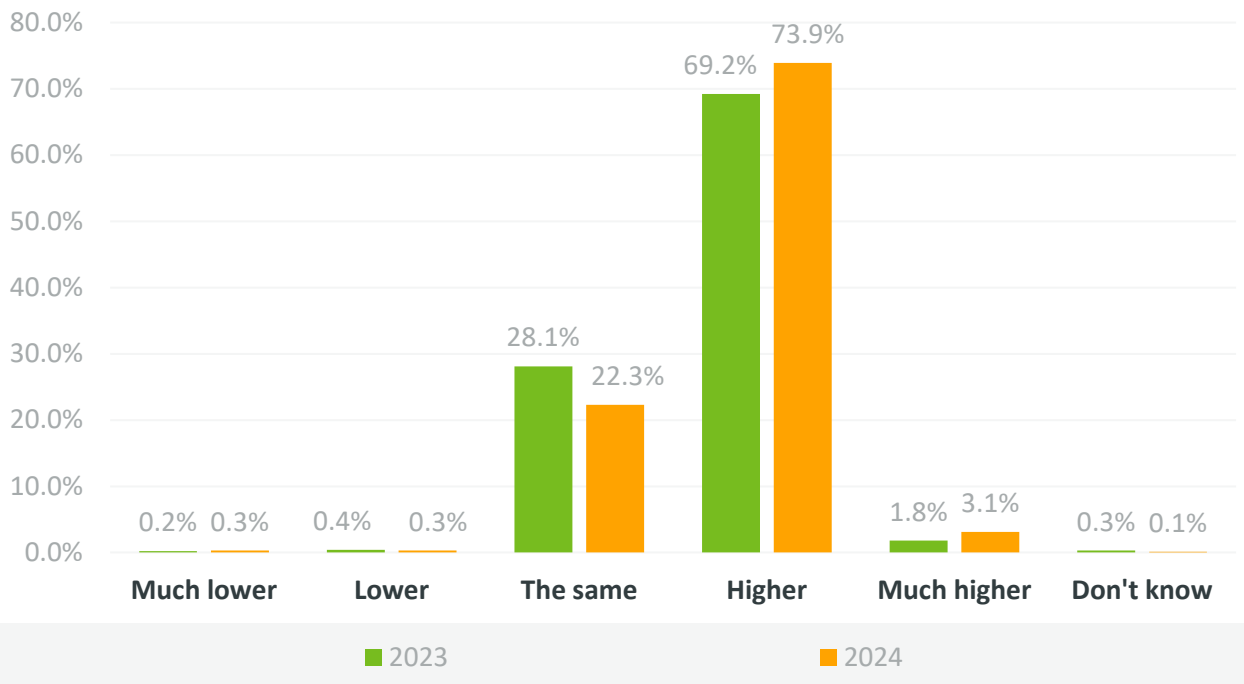
### Occupancy compared to last year



Compared to the previous year, Sweden’s office occupancy in 2024 shows a marginal increase in the “Higher” category, rising from 45.3% to 48.2%, alongside a decrease in the “Lower” category from 12.7% to 10.1%. Overall, the distribution remains relatively consistent, signaling stability in workspace utilization trends over the period.

4

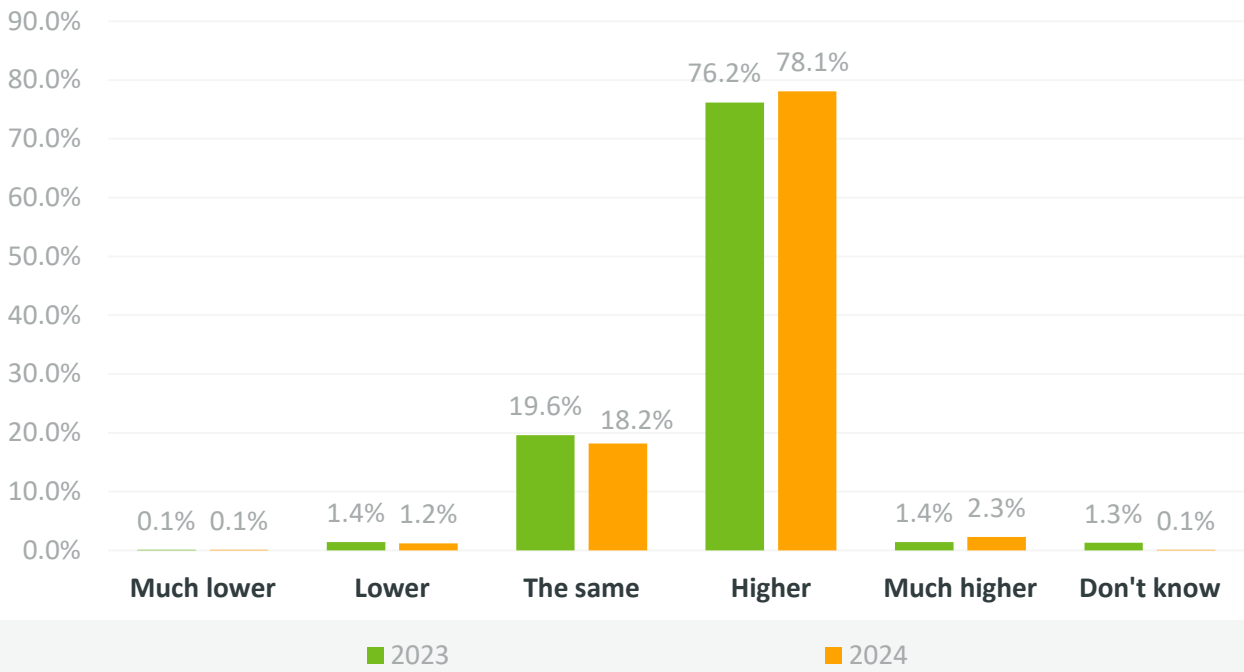
### Occupancy expectation in 6 months



Anticipating future trends, Sweden’s occupancy expectations for the next six months in 2024 depict a slight decline in the “Same” category, dropping from 28.1% to 22.3%, while the “Higher” category sees an increase from 69.2% to 73.9%.

5

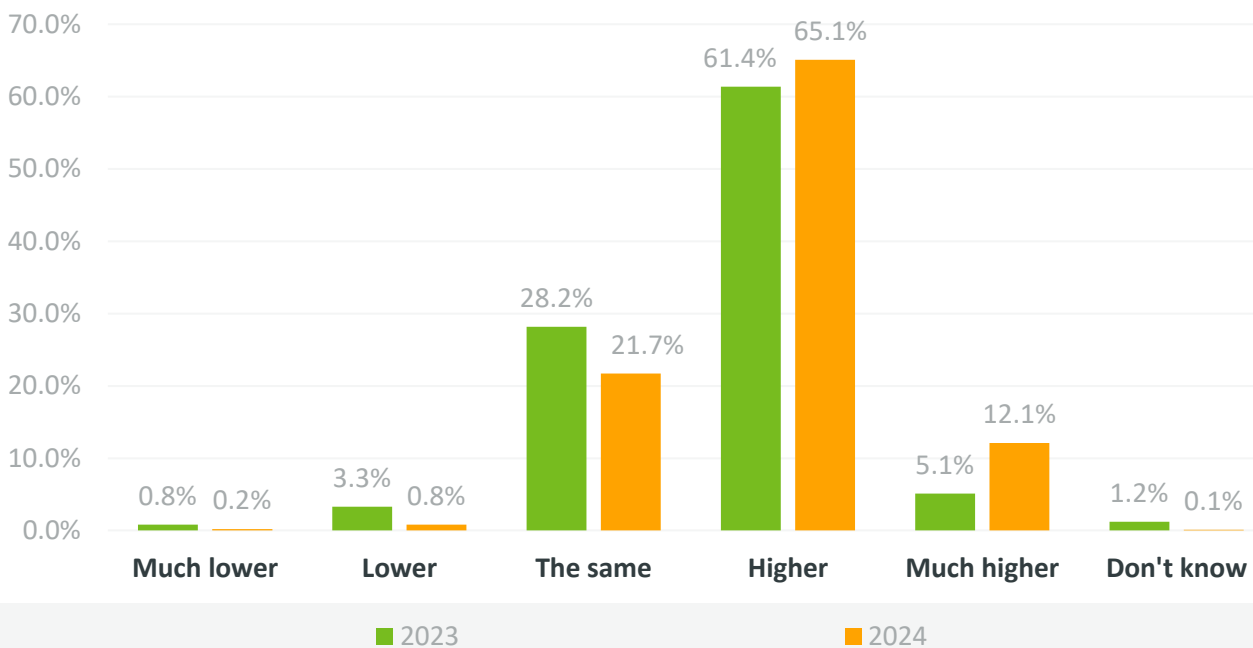
### Achieved prices for office contracts or workstations compared to last year



In the realm of pricing, Sweden’s office contracts or workstation prices remained relatively steady in 2024 compared to the previous year, with slight decreases in the “Same” and “Lower” categories and an increase in both “Higher” and “Much higher” categories, suggesting stability and potential growth in the market.

6

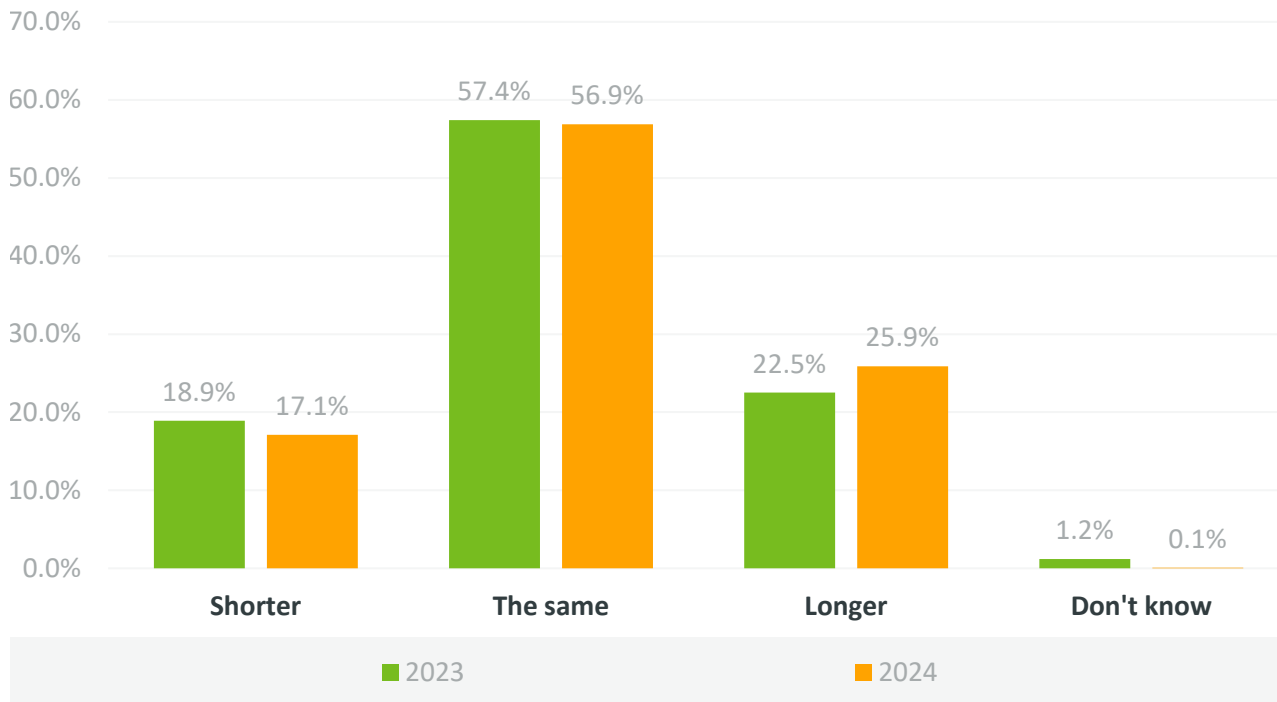
### Expected price level in 6 months



Sweden’s outlook on office contract prices in six months shows a 3.7%-point increase, rising from 61.4% in 2023 to 65.1% in 2024. Expectations for unchanged prices decreased from 28.2% to 21.7%.

7

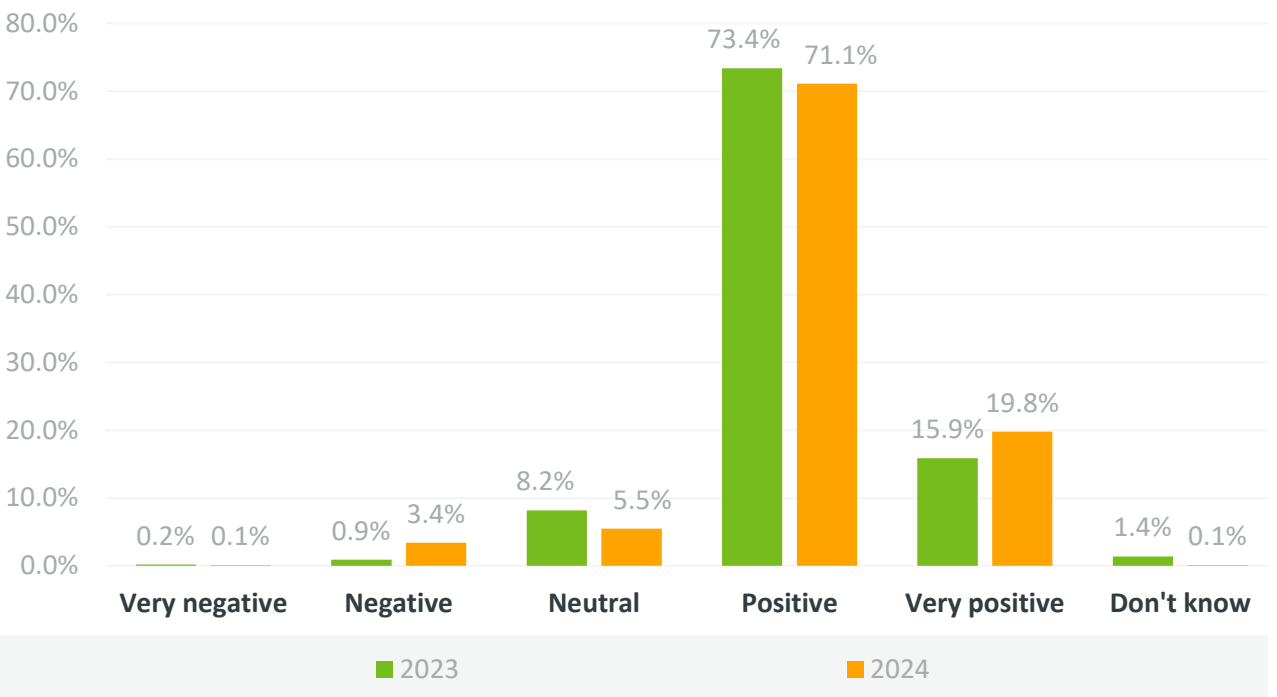
### Initial contract length compared to last year



In 2024, Sweden’s initial contract lengths show a slight decrease in “Shorter” contracts (17.1% from 18.9% in 2023) and a notable increase in “Longer” contracts (25.9% from 22.5% in 2023).

8

### General outlook



In 2024, Sweden’s industry outlook remains largely positive, with 71.1% expressing positivity and 19.8% feeling very positive, indicating sustained optimism compared to 2023’s 73.4% positive and 15.9% very positive responses.



# Asia

In 2024, the Asian flexible workspace market showcases dynamic trends shaping the future of office environments.

As the year progresses, a significant emphasis is placed on wellness and sustainability within flexible office spaces.

Operators are increasingly integrating features that prioritize tenant well-being, such as access to natural light, ergonomic furnishings, and wellness programs. Sustainability also takes center stage, with a focus on eco-friendly materials and energy-efficient design.

Moreover, there's a discernible shift towards demand for high-quality spaces. Businesses are now seeking premium flexible office solutions that offer top-notch amenities and prime locations, indicating a departure from purely cost-saving motivations.

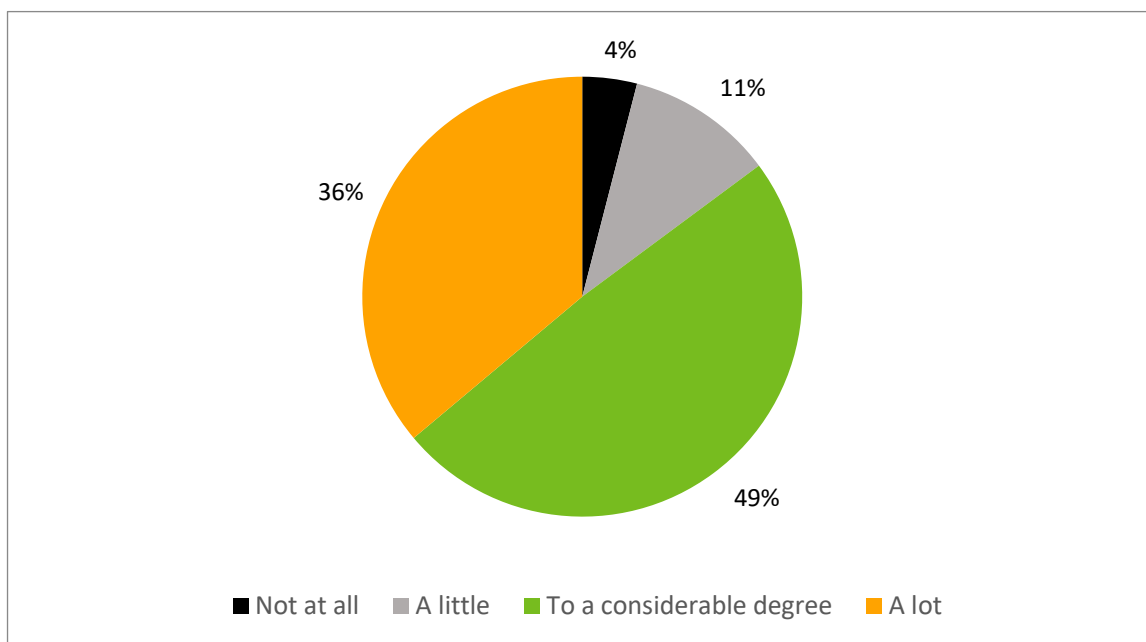
In line with technological advancements, providers are actively incorporating innovative technologies to elevate the user experience. Touchless entry systems, smart building features, and enhanced video conferencing capabilities are among the key technological integrations observed in the flexible workspace landscape.

A notable trend is the burgeoning growth of suburban and regional markets. Beyond major urban centers, there's a noticeable expansion in demand for flexible workspace options in suburban and regional areas, reflecting evolving work preferences and accessibility needs.

Overall, the outlook for the flexible office market in Asia remains optimistic, driven by a continued preference for agility, employee well-being, and the creation of positive work environments. As operators strive to meet evolving demands, the market is poised for further growth and innovation.

1

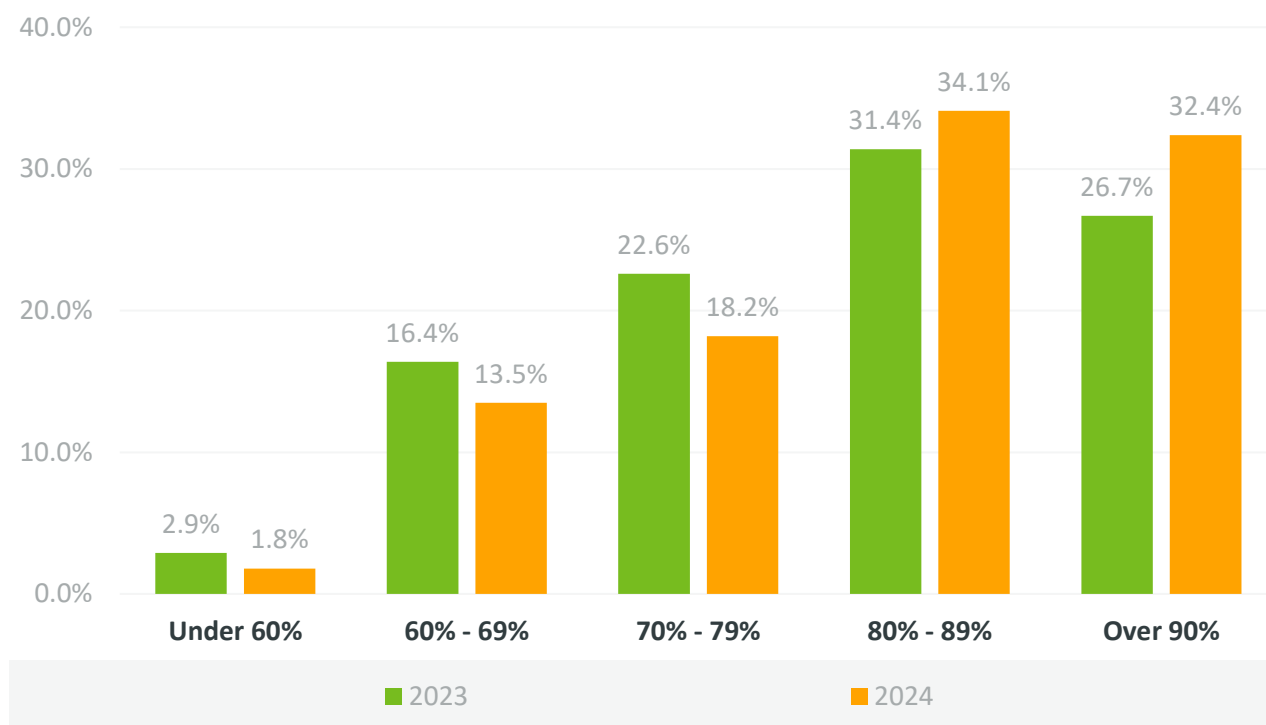
### AI impact on daily business operations and office workflow



In Asia, the influence of artificial intelligence on daily business operations and office workflow is evident. Nearly half of respondents (49%) note a considerable impact, while 36% report a significant influence. Minor effects are observed by 11%, and 4% indicate no influence at all.

2

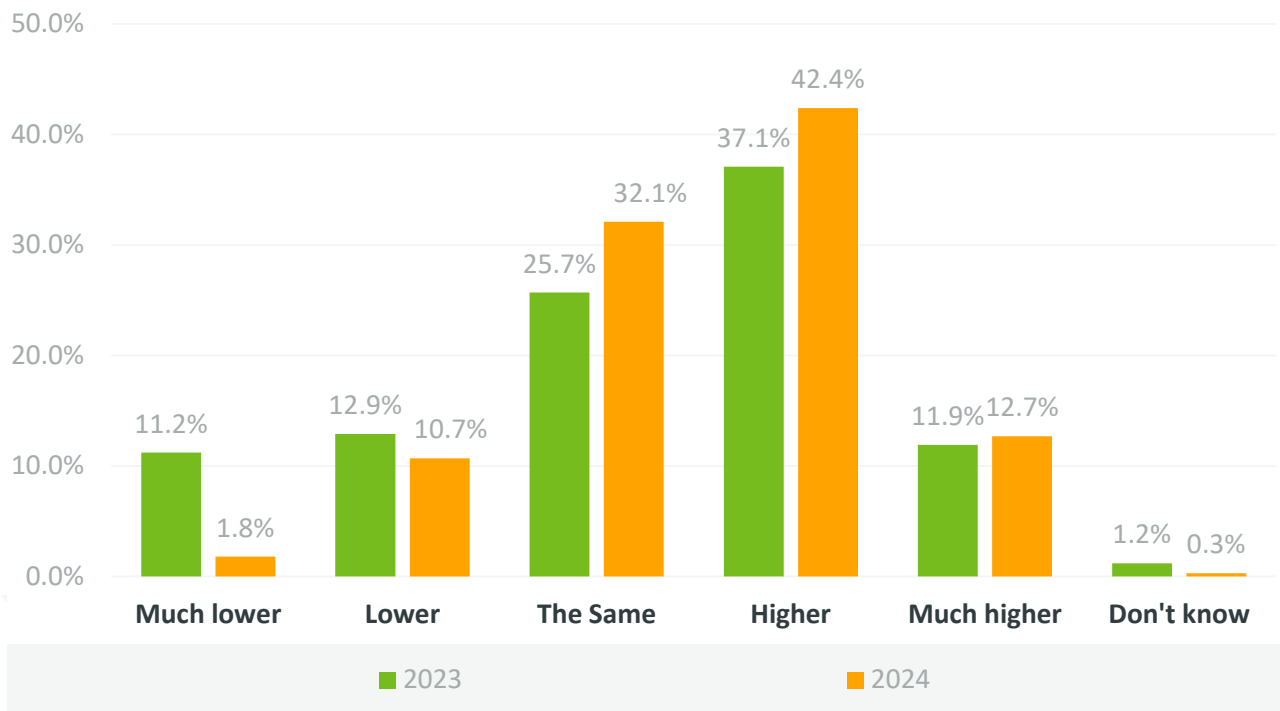
### Average office occupancy



Office occupancy trends remained relatively stable from 2023 to 2024, with slight decreases in lower occupancy bands and increases in the over 90% category, suggesting a shift towards higher utilization rates.

3

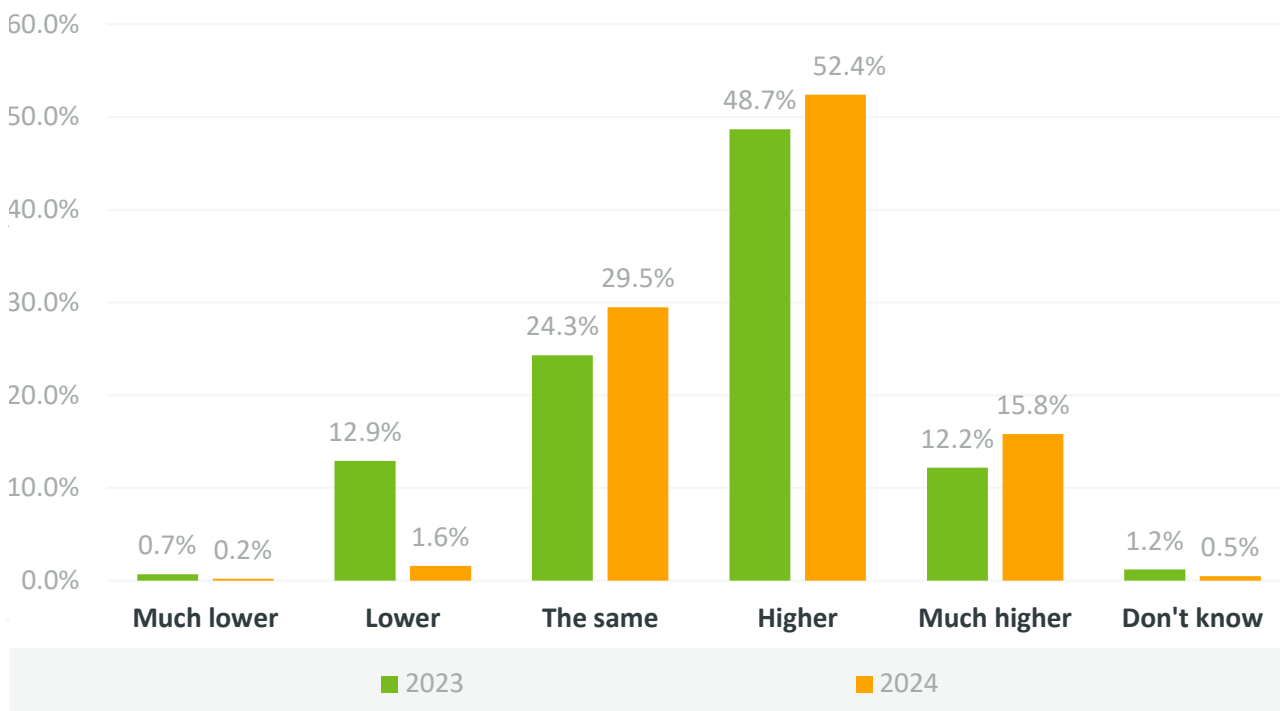
### Occupancy compared to last year



Comparing to the previous year, Asian office occupancy in 2024 sees a significant decrease in the “Much lower” category (from 11.2% to 1.8%) and notable increases in both “Higher” and “Much higher” categories.

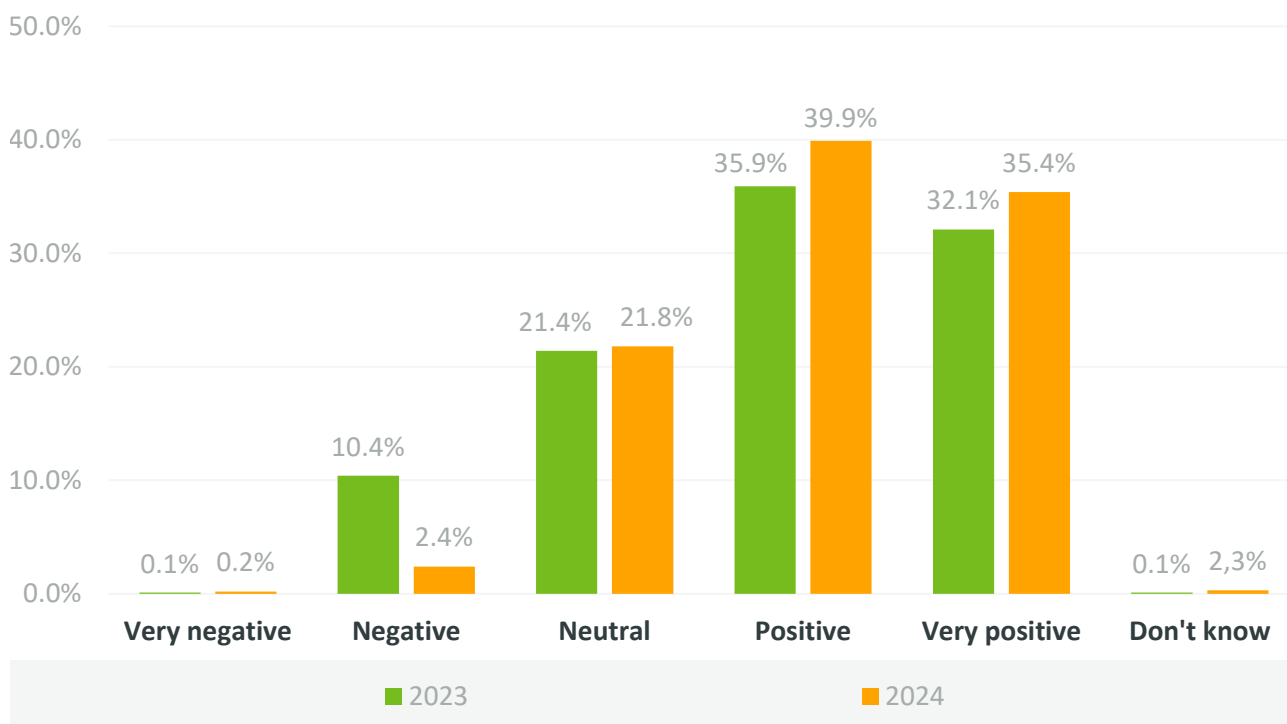
4

### Expected price level in 6 months



Anticipating price levels in the next six months, Asian respondents in 2024 show a decrease in expectations for “Lower” prices and an increase in expectations for both “Higher” and “Much higher” prices compared to 2023.

## General outlook



In 2024, Asian respondents exhibit heightened optimism for the industry's future, with a notable increase in both "Positive" (from 35.9% to 39.9%) and "Very positive" (from 32.1% to 35.4%) outlooks, while negative sentiments decrease (from 10.4% to 2.4%).



# North America

In 2024, North America's flexible workspace sector experiences a paradigm shift, with emerging trends reshaping the landscape of work environments.

This year marks a pivotal moment as businesses increasingly prioritize agility and employee-centric design, fostering a culture of innovation and productivity within dynamic workspaces.

Office occupancy trends in North America have seen nuanced shifts from 2023 to 2024, with slight variations across different occupancy bands. Notably, there's a discernible movement towards higher utilization rates, signaling evolving patterns in workspace utilization.

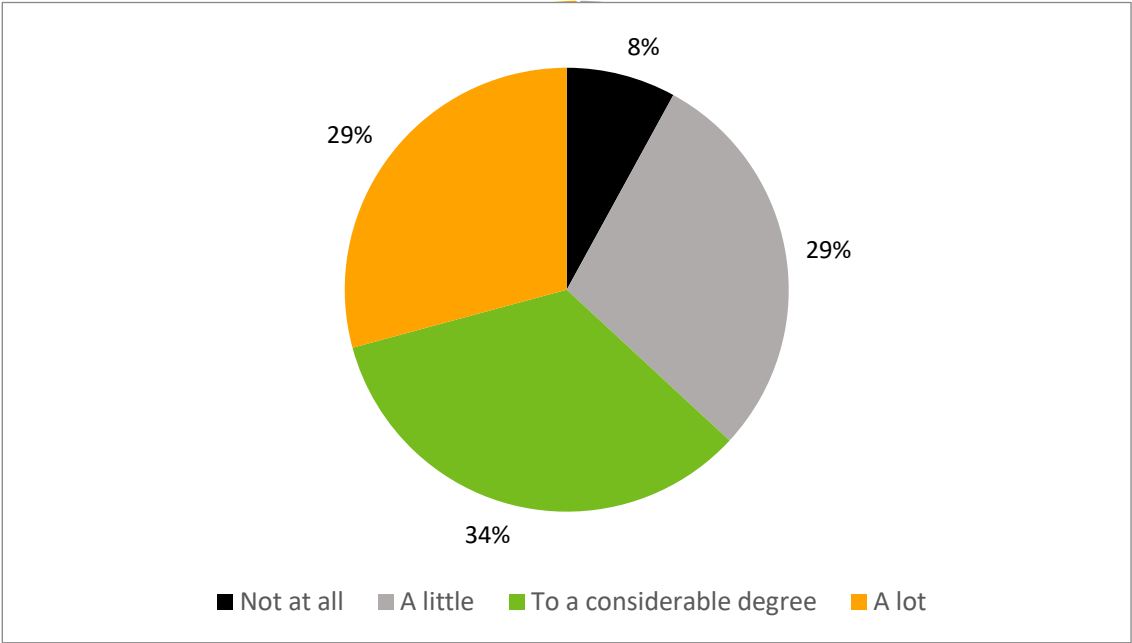
Comparing to the previous year, North American office occupancy in 2024 undergoes notable changes, particularly with significant increases in the "Higher" and "Much higher" categories, indicating a potential surge in demand for office spaces.

Anticipating price levels in the coming months, North American respondents in 2024 demonstrate altered expectations, with fewer anticipating lower prices and more expecting higher or much higher prices compared to 2023.

Furthermore, the outlook for the industry in North America is marked by heightened optimism in 2024, with increased positive sentiments and decreased negative outlooks among respondents. This positive outlook aligns with the broader trend towards agility, employee well-being, and the creation of positive work environments, highlighting the evolving nature of the flexible office market in North America.

1

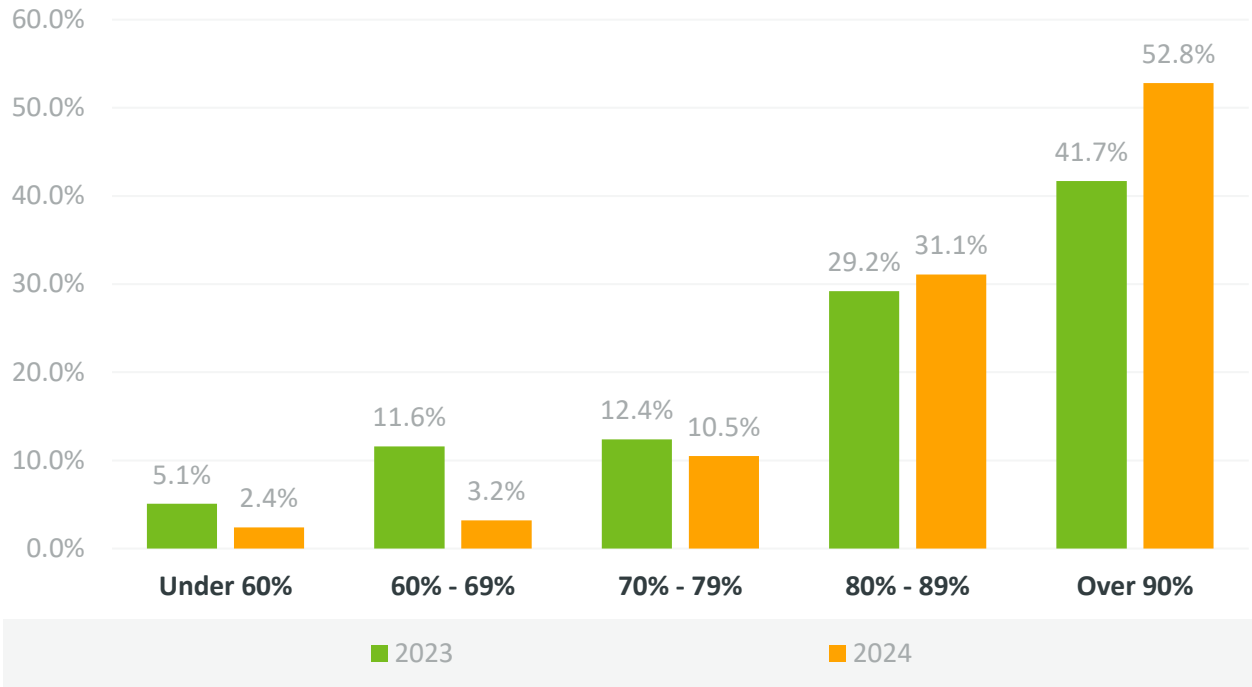
### How much did the COVID-19 influence your business?



In North America, the influence of artificial intelligence on daily business operations and office workflow varies. While 8% report no influence, 29% note minor effects, 34% observe considerable impact, and 29% experience significant changes.

2

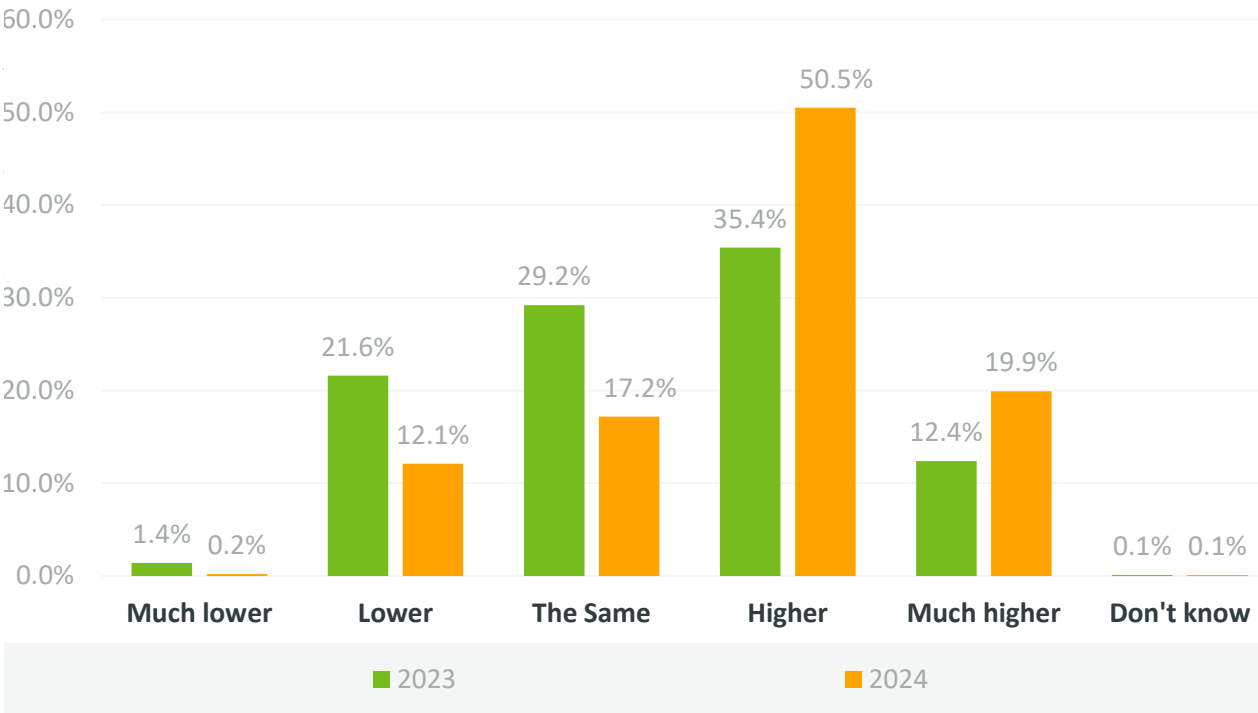
### Average office occupancy



In 2023, North America’s average office occupancy ranged from 5.1% for under 60% occupancy to 41.7% for over 90%. By 2024, it shifted, with 52.8% now exceeding 90% occupancy.

3

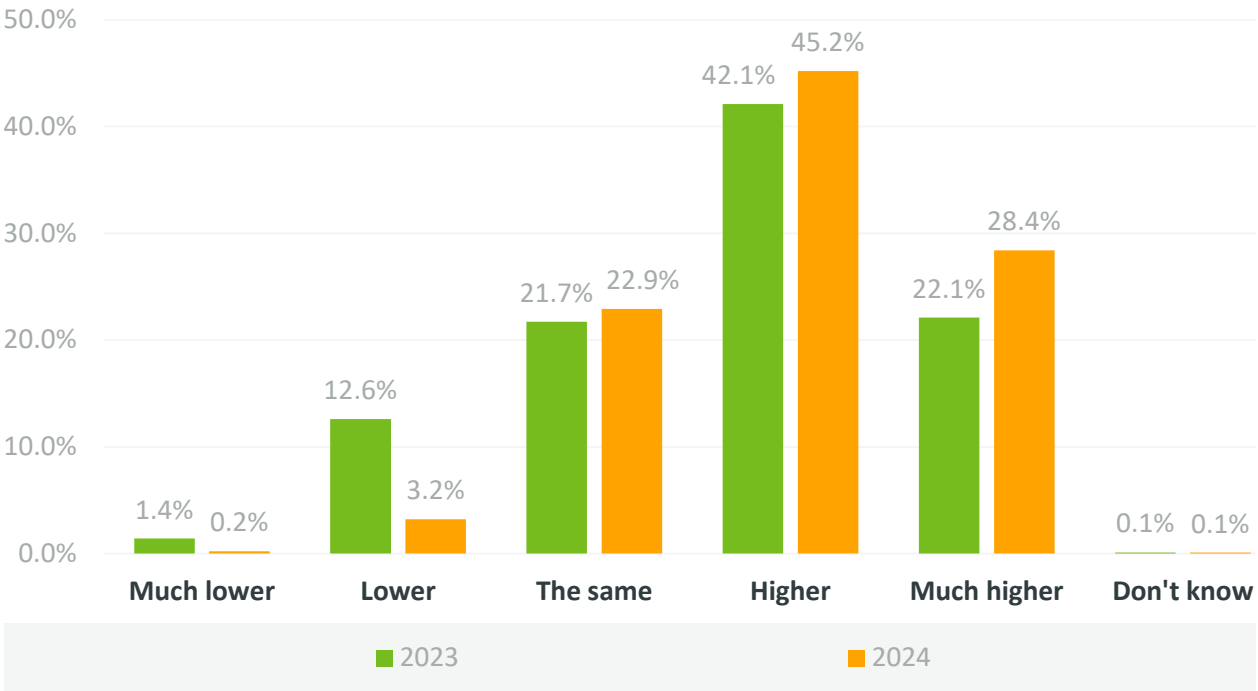
### Occupancy compared to last year



In 2024, North America’s office occupancy showed improvements, with “Higher” rising from 35.4% to 50.5% and “Much higher” increasing from 12.4% to 19.9%. Conversely, “Lower” decreased from 21.6% to 12.1%.

4

### Expected price level in 6 months



In 2024, North American respondents anticipate a shift in price levels over the next six months, with expectations of prices remaining “the same” decreasing from 21.7% to 22.9%, while both “Higher” and “Much higher” categories see increases.

## General outlook



In 2024, optimism prevails among North American respondents regarding the future of the industry, with positive sentiments increasing significantly from 34.6% to 52.8%. Negative outlooks diminish notably, reflecting a strong confidence in the industry's trajectory moving forward.



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