

Voice of the CUSTOMER

2025

Report Summary

Sponsors:



NEWMARK



What we Found

Personality Characteristics that Shape Office Attendance



23%
Innovator

Seeks change, advanced technology,
and flexible spaces that foster creativity.



39%
Wellness Seeker

Prioritises well-being, healthy environments,
and a positive work-life balance.



28%
Maximiser

Focused on efficiency, values resources
that optimise time and productivity.

Experience Trumps Everything

71% of workers would increase office attendance
for ideal workplace experiences.

Tipping Point

When 60–70% of staff are present, around 90% find
value in being there. This critical threshold creates
momentum where employees come in to avoid
missing out on collaboration and connection.

Why it Matters

Format Alignment Creates Competitive Advantage

Success depends on aligning physical environments
with psychological needs. Neighbourhood formats
suit suburban Wellness Seekers, Club formats attract
innovation-driven Innovators, and Hub formats serve
efficiency-focused Maximisers. This alignment, supported
by our positioning framework, enables more targeted
customer acquisition and stronger retention.



Neighbourhood



Club



Hub

The Service Perception Gap Demands Action

While 80% of operators believe they deliver superior
service, only 20% of customers agree. This stark disconnect
highlights the need to move beyond vanity metrics and
instead focus on genuine customer insight, prioritising
experience quality over operational convenience.

Investment Priorities

Technology infrastructure, noise control, private workspace
options, and higher service standards emerge as critical
success factors. The evidence shows that experience-led
strategies drive both higher attendance and longer-term
commitments, proving that quality investment is more
profitable than cost-cutting.



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