Priorities in Accommodating office user preferences
Impact on office users decision to stay or go

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Priorities in Accommodating Office User Preferences: impact on office users decision to stay or go

Abstract

Purpose When current accommodation is unsatisfactory, office organisations consider relocating to new accommodation that optimally facilitates their main processes and supports image and financial yield. However, due to high vacancy levels, public opinion and governmental awareness oppose new office construction. Reusing existing buildings could be the egg of Columbus. This paper aims at answering the questions: Which property characteristics are important push and pull factors for relocation? What does this mean for the decision: stay or go?

Design/methodology/approach A literature review of factors determining organisations' accommodation choices was conducted. Interviews were held with large-scale office organisations and creative organisations, discussing relocation drivers. Henceforth, a survey was held among creative organisations, collecting data about property characteristics important for their preferences. Finally, office user preferences were compared with characteristics of structurally vacant buildings.

Findings Traditional push factors like car accessibility, extension need, and location and building image remain important. Nowadays sustainability issues like reducing energy consumption and better public transportation accessibility are highly prioritised pull factors as well. Regarding the creative industries, bike- and public transportation accessibility, multi-tenancy, and ICT and meeting facilities are most important.

Practical implications Knowing office users' preferences is important to attract and retain stable tenants. If office space supply is highly aligned to end-users demands and easily adaptable to changing needs, probably more organisations will decide to stay instead of go, leaving behind empty offices.

Originality value This study combines data about push and pull factors with relocation decision-making, innovatively focussing on the creative industries. The data can be used to explore opportunities and risks of adaptive re-use of the existing building stock.

Keywords: offices, vacancy, user preferences, push-, pull- and keep- factors, creative industries

Introduction

New ways of working and the financial and real estate crises reduce the need for office space. Simultaneously, overproduction characterised office market developments after 2000. As a consequence office markets have become replacement markets without a quantitative need for new office buildings: new buildings drive out bad buildings. In the Netherlands, currently 15% of the office space is vacant, of which 60% is structurally vacant, meaning vacancy for three or more years.

When relocating, office organisations consider buildings and locations within geographically defined markets that optimally facilitate their main processes and support image and financial yield. Sustainable and durable office space is important for image, status and possible expansion. Hitherto, new office developments were the response to this demand. Meanwhile, public opinion and governmental awareness oppose new office construction in markets with high vacancy due to the risk of long term vacancy resulting in a negative influence on vitality and economic power of the area and risk of vandalism. New ideas are needed to realise durable office space while limiting new developments. For this reason a sound understanding of user needs and preferences is of outmost importance. Knowledge about prioritized user needs can be helpful to design and manage a durable building stock and to explore the opportunities and risks of redesign and upgrade of the existing building. This paper aims at answering the questions: *Which property characteristics are important push and pull-factors for office organisations considering relocation? What does this mean for the decision: should I stay or should I go?*

This study focuses on office user accommodation preferences in connection to location and building characteristics. Because of the growing creative industry sector, particular attention is being paid to the preferences of office organisations working in this sector. This paper is based on empirical studies of the Dutch office market and office user preferences.

Office user preferences

Relevance of coping with user preferences

The current office market condition, where the office user has extensive accommodation options, has highlighted the significance of attaining a good fit with user preferences (DTZ 2011). An office building may become obsolete and remain vacant when its features do not meet current users' requirements. The same market conditions imply that even if the building is still occupied, current or prospective users derive less utility from the office building and are not willing to pay high rent (Remøy 2010). In both cases the rent revenues for the investor decrease. Former studies (Brennan, Cannaday et al. 1984; Baum and McElhinney 1997; Korteweg 2002; Archer and Smith 2003; Rodenburg 2006; Koppels, Remøy et al. 2009; Remøy, Koppels et al. 2009) have shown the relationship between vacancy and rent levels and location- and building-characteristics, considering the following characteristics: accessibility by car, image of the area, geographical location, accessibility by public transport and proximity to Schiphol airport, quality of real estate, labour market, business cluster, multi-functionality, high-visible location, presence of clients, presence of suppliers, parking, external appearance, entrance visibility and interior finishing quality, and lay-out flexibility. A misfit between supply and demand regarding these issues will result in an increasing risk on vacancy and lower rent levels. On the other hand, in the domain of residential dwellings Dogge showed that satisfied tenants are more committed, resulting in a higher tendency to be loyal to the landlord and not move (Dogge and Smeets 2004) in (Appel-Meulenbroek 2008). As a consequence it is of utmost importance to understand office user requirements and prioritised aspects.

Indicators of office user preferences: push and pull factors in case of relocation

Accommodation decision-making of office organisations is complex and based on preferences for location, building, facilities and price factors that are intertwined and influence each other. In literature, four types of factors are mentioned that affect location and accommodation choices: push, pull, keep- and reject factors (Meester and Pellenbarg 1986). Push factors describe the situation when the current building or location no longer meets the needs of the user. Pull factors indicate a high attractiveness of alternative options. Keep factors are reasons to stay in the current building, and reject factors describe reasons that discourage an organisation to settle in a building. The vast majority of migration studies are limited to the push and pull factors. If the keep factors are stronger than the pull or push factors, it is likely that no relocation occurs.

Several Dutch market-surveys revealed the main push factors in the selection of office accommodation (Pellenbarg 1976; Besselink, van Greene et al. 1988; Kok, Menkhorst et al. 1999; Boelens 2008).

Office tenants are asked to rate a number of location and building characteristic according to their perceived importance from 1 (not important) to 10 (very important). Lack of space, accessibility and representativeness of the location and the building are weighty motives for moving and as such important push-factors (see Table 1). A recent study by Zaghoud (2013) showed an increasing importance of sustainability considerations. Practical issues such as ending of a lease contract are taken into account as well, as favourable conditions to move (see last column Table 1). Additionally, the fear of image damage by leaving a vacant office behind showed to play an increasingly important role in the decision to stay or go and move to an existing building or a new building.

Table 1: Push factors based on different studies

1976	**1988**	**1999**	**2008**	**2013**
Lack of expansion space	Lack of expansion space	Lack of expansion space	Lack of expansion space	Organizational considerations
Organizational considerations	Organizational considerations	Organizational considerations	Organizational considerations	Ending of lease period
Poor conditions of the premises	Local traffic situation	Optimistic expectations for the future	Optimistic expectations for the future	Low level of sustainability
Threat of expropriation/lease termination	Poor conditions of the premises	No representative building	No representative building	Optimistic expectations for the future
No representative environment	No representative building	Poor conditions of the premises	Poor conditions of the premises	Poor accessibility by public transport

Sources: Pellenbarg (1976), Besselink et al. (1988), Kok (1999), Boelens (2008) and (Zaghdoud 2013). Comparability of the latter study with the former studies is limited due to a different way of selecting respondents

Based on a literature review and structured face-to-face interviews with 38 office tenants from two multi-tenant offices in the Eindhoven region, Netherlands, Appel-Meulenbroek (2008) explored interralationships between keep, push and pull factors and user satisfaction and loyalty, with expected performance as an interaction variable. She refers to Pen (2002) who detected 15 buidling factors, 15 company factors and 16 external factors in conncection to push, pull and keep factors. Building factors include appearance, rent/land price, health and safety, age, size, extension possibilities and so on. External factors relate to the location, e.g. accessibility, parking facilities, proximity to inner-city facilities, quality of life including safety, and economic factors such as the regional labour market. Company factors are such as the company strategy, quality demands, profit development and reorganisation, but are out of scope of designers. Building on the factors detected by Pen (2002), Appel-Meulenbroek found proximity to inner city, flexibility of the building and saleability to be the most important keep factors. Most important pushfactors showed to be the age of the building, environmental policy, appearance of the building, maintanance and company factors like reorganisation and market interest. Main important pull factors include maintenance state, quality demands, health and safety, age of the building and growth. More than half of the factors judged negatively (a push factor) were subsequently also considered to be better in other offices (a pull factor). Surprisingly, not many keep factors could be linked to satisfaction, but push and pull factors could, in particular appearance, comfort, maintenance state and quality of fitting.

Based on literature (Louw 1996; Kok, Menkhorst et al. 1999; Korteweg 2002), Remøy *et al.* (2007) developed a list of 15 building characteristics and 6 location characteristics considered to be important pull-factors for office organisations relocating in the Dutch office market. Using a Delphi survey method, accommodation experts were interviewed and asked to rank the location and building characteristics that influence office organisations choice when relocating. The experts were asked to focus on office organisations in Amsterdam, with the largest target groups being medium and large scale financial and business services companies. **Fout! Ongeldige bladwijzerverwijzing.** shows the average ranking of prioritised aspects. Accessibility by cars and public transport, car parking, an attractive appearance of the location and flexibility of the building showed to be highly prioritised aspects in case of relocation. Here, too, environmental issues like comfort, energy performance and space efficiency score high on the list of preferred characteristics.

Table 2 Prioritised property characteristics in relocation decisions (Remøy *et al.* 2007)

Building characteristics	Location characteristics
1. Car parking	1. Accessibility by car
2. Exterior appearance	2. Status
3. Layout flexibility	3. Accessibility by public transport
4. Space efficiency	4. Facilities
5. Comfort	5. Safety
6. Interior appearance	6. Business cluster
7. Recognisable user	
8. Technical state	
9. Building facilities	
10. Year of construction	
11. Security	
12. Energy performance	
13. Routing	
14. Bike parking	
15. Commodities logistic	

Vacancy as an indicator of a mismatch between supply and office user preferences

Studies of the Amsterdam office market revealed the location and building characteristics of office properties with a high level of structural vacancy, structural vacancy meaning vacancy for 3 or more consecutive years (Remøy 2010). Though location characteristics describing the location as mono-functional (tested by the functional mix and availability of facilities) were found to be highly influential, building characteristics were found to be the most important predictors for structural vacancy. Office buildings with low flexibility (described by the size of standard floors, measurements of the main structural grid and the facade grid) were found to have higher odds of structural vacancy. Equally, office buildings with a poor external appearance, defined by a technically outdated and poorly maintained facade were found to have increased risk of structural vacancy. On the other hand, a spatially comfortable entrance as a measure for the interior appearance of the building was found to decrease the odds of structural vacancy. Measured as the free height of the entrance in relationship to its floor space, the variable describes the spatial proportions of the entrance. Entrances with relatively low ceilings and large surfaces are experienced as low and unpleasant, whereas entrances with relatively high ceilings and small surfaces are experienced as narrow and unfriendly. Apparently, office users prefer a well-balanced ratio between ceiling height and floor space.

In conclusion, office buildings that have an increased risk of structural vacancy were described by the following location and building characteristics:

- year of construction between 1980 and 1995
- location with insufficient facilities
- low status locations
- mono-functional locations
- less parking places than surrounding buildings
- functional obsolescence
- glass facades
- low quality interior
- technical decay

Creative Industry user preferences

While in the production economy large organisations were needed to achieve competitive advantage, in the modern knowledge society increasingly often we see small organisations which operate together to integrate knowledge from different disciplines. This is the principle of a network organisation. Flexibility, meeting and knowledge transfer are key elements to achieve results. Currently the creative industries show the most resemblance to the principles of a network (Florida 2003; Florida 2004; Florida 2010). The creative industry is the engine for a successful knowledge economy. Currently, the creative industries are often accommodated in old industrial buildings and locations, equipped with facilities to encourage companies to work together (Currid 2007; Smit 2012). According to organisation experts, in the future more companies will operate within a network of companies (Bijlsma, Efimova et al. 2010). The creative industry is usually ahead of other sectors and exposes trends that might be picked up by more conventional companies and new generations of workers (Blackwell 2013). For this reason, the accommodation preferences of the creative industry were examined on three levels: location, building and supporting facilities. The latter category is rarely mentioned in real estate research, but seems important for this user group.

Data-collection and data-analysis methods

To further unravel the preferred property characteristics by office users, two additional studies were conducted using different types of interviews, a survey and site visits, all based on the stated preferences of office organisations and accommodation experts. The first study focused on large scale office organisations, the second one on the creative industries. The data were collected and analysed by MSc students under supervision of the authors of this paper (Arkenbout 2012; Hendrikx 2012). Third, a comparison has been made between user preferences and building and location characteristics of vacant buildings.

a. *Interviews with large scale office organisations*

Twenty interviews were held with large scale Dutch office organisations. The interviews included structured interview questions and were partly conducted as open interviews. The structured part was set up to test current user preferences towards the preferences that were found in former studies (Pellenbarg 1976; Besselink *et al.* 1988; Kok *et al.* 1999; Boelens 2008). The open part was carried out to find out whether organisations now consider relocation motives that were not mentioned in former studies, and whether other aspects have become important for accommodation preferences.

b. *Data-collection on user preferences of the creative industries*

According to the Standard Industrial Classification – SIC - from 2009, the creative industries can be divided into three sub-sectors: creative business services, arts, and media & entertainment. For each sub-sector user preferences were determined by a literature review, a Delphi study, and a survey among 800 respondents. In addition three creative clusters in the Netherlands factory were visited to explore its main characteristics and themes to be included in the survey questionnaire. These clusters are accommodated in a former Caballero factory, the HAKA building (adaptive-reuse of a former mix of offices, factory, and grain silo) and a former Chewing Gum factory.

In the Delphi study 28 experts were asked to rank user preferences of the creative industries in order of importance, for each of the three different sub-sectors. The Delphi study consisted of two rounds of questions and a feedback session. In the first round the panellists were asked to spend 5-10 minutes to rank the characteristics according to importance. The results per panellist were collected. Subsequently, the data were analysed on degree of similarity in prioritization on the basis of the statistical coefficient Kendall W. The second round took place by e-mail. Here the panellists were informed about their own results compared to the results of the other panel members and asked whether they would alter their former judgement. Based on round two a final list was drawn from ten location characteristics, eleven building characteristics and eleven types of supporting facilities arranged in order of importance. Based on these results the three highest scoring aspects per scale-level were selected. These nine aspects were resubmitted to the experts, asking them to rank these aspects in order of importance.

The insights from the Delphi study were used to set out a survey among 800 respondents spread over 19 creative clusters in the Netherlands. In this survey the users were asked about the importance of housing characteristics at the level of location, building and supporting facilities, as recognised from the Delphi study. Additional questions were asked about the importance of external appearance, meeting places, recognition of the user, cooperation and whether or not sharing facilities. The response rate was nearly 25 percent, of which three quarters had completed the questionnaire. This seems sufficient to be able to draw conclusions.

c. Comparison between user preferences and characteristics of structurally vacant buildings

Based on the assumption that vacancy is an indicator of a mismatch between the current building stock and user demands, the user preferences of the creative class and the large scale organisations were compared to the building characteristics of structurally vacant office buildings as determined in former research (Remøy 2010). This could add to a better understanding of both reasons for vacancy and opportunities for adaptive re-use, provided that vacant buildings are sufficiently adaptable to facilitate office users' preferences.

Research findings

a. User preferences of large scale office organisations

The interviews confirmed the findings from the migration studies that were mentioned earlier (Table 1). Need of expansion space, better accessibility (especially by public transport), and representativeness are still important motives for relocations. The interviews also showed an increased importance of environmental factors such as the wish to fit with sustainability marks like BREEAM and LEED. Organisational considerations include the implementation of new ways of working resulting in less need of space and an increasing need for social interaction resulting in the need for an office designed as a place to meet. Once, 'culture' due to the fusion of different cultures after a merger, or an ending lease period, is mentioned. Similar arguments were used to describe pull factors, supplemented by 'central location in the Netherlands' and 'Low land prices'. The main keep factors mentioned were a positive image of the place, 'emotional bond' and tradition (the company is traditionally established here). Main objections for moving were the high investment and relocation costs, human considerations (longer travel or necessity to move for employees), owning the property and fear for less productivity during the relocation period. Remarkably, eleven of the thirteen surveyed users made a serious consideration between staying and moving. Decisive motives in this assessment are often the characteristics of the current location, results of the business case, annual accommodation costs for different scenarios and sustainability. Other motives, such as cooperation with the current owner and emotional connection also play a role. Also, the choice between moving to a new or an existing building is usually seriously considered. The choice for new construction is often motivated by the mismatch between the demand and supply of existing construction, limited adaptability of existing buildings and financial considerations. The arguments to opt for existing buildings vary from a fast moving process, flexibility and short leases, to a need for identity and sustainability.

Table 3 shows the push-factors mentioned by the interviewees i.e. the number of respondents that mentioned a particular issue as a consideration to move to a new building or an existing one or to stay (last column), and the weighted score i.e. the number of respondents multiplied by 0 = not important at all, 1 = of little importance, 2 = important, 3 = very important, and 4 = mentioned spontaneously.

Table 3: Considerations to stay or go and weighted scores (Hendrikx, 2012)

	People that moved to a new building	People that moved to an existing building	People that stayed (Renovation)	Total Score	Number of respondents mentioning this aspect
Organizational considerations	2	11	4	17	6
Sustainability	0	6	6	12	4
Poor state of the building	4	4	2	10	4
No opportunities for extension	0	10	0	10	3
Poor accessibility by public transport	4	4	0	8	2
Building not representative	5	2	1	8	4
Location not representative	4	4	0	8	2
No nice living conditions	2	3	2	7	4
No flexible rent opportunities	0	3	2	5	3
Optimistic future expectations	0	3	2	5	3
Lack of parking facilities	1	1	2	4	3
Inadequate traffic circumstances	0	1	2	3	2
Poor contact with local authorities	0	2	0	2	1
Changing production	0	0	2	2	1
Inadequate work climate	0	2	0	2	1
Poor accessibility in general	0	2	0	2	1
Absence of knowledge centres	0	1	0	1	1
Annoyance in/from environment	0	0	1	1	1
Poor location regarding customers	1	0	0	1	1
Other (miscellaneous)	8	6	0	14	4

There is a growing focus on sustainability, whereby users' interest for adaptation increase. There is also a growing demand for flexible and short leases, active asset management and shared services and facilities. A number of investors are already responding to this question. Additionally, asset managers mention keeping good contact with the tenant as an important ingredient in property management, together with careful technical management of the property, preserved quality, the possibility to break open and renew contracts (e.g. in return for less m2) and the use of incentives.

b. User preferences of creative industries

The survey findings show which accommodation characteristics are perceived as most important in terms of location, building and facilities, varying by sub-sector. The creative business service sector has different requirements than the arts and media & entertainment sector. Table 4 shows the similarities and dissimilarities between the prioritized aspects by three categories of creative industries according to the survey findings. Regarding location and facilities needs the preferences of the three sub-sectors are almost identical, but on building level, clear differences were found. Artists attach particular importance to a flexible layout and commercial space with additional free floor height. The creative business services and media & entertainment attach more value to the representativeness of the accommodation, recognition and appearance of the image of the organisation.

User preferences regarding the location

For the creative industries accessibility, social security and the presence of a restaurant or café are important when choosing a business location. The presence of other facilities in the surrounding is less important. The creative industry prefers business premises well accessible by bicycle and close to public transport. To ensure customer satisfaction it is desirable if the business premises are also easily accessible by car. Furthermore, the social security of the location is of great importance. A secure location with less risk of burglaries represents a pleasant living environment. Usually, areas with different functions and facilities are regarded safe, as twenty-four hour activity is created. The presence of for example a bar and restaurant is a means to achieve a twenty-four hour active area. Furthermore, cafes in the area work as a third workplace where people can meet, work and share knowledge. According to the respondents of the survey a restaurant and café are not important for choosing a business location. This is in contrast to the results from literature and expert interviews. This may have to do with a different frame of reference of practice experts and users.

User preferences regarding the building

The creative industry prefers flexible buildings. The layout should fit multiple tenants and should offer different separate business units, and the interior should be of high quality. The user wants layout flexibility and the ability to rent more or less square metres. The creative industry prefers accommodation in a building where common areas are shared with co-tenants, as a means and opportunity for new cooperation, knowledge transfer and cost sharing. Offering several small premises in the same building is desirable for this target group. With regard to the recognition and visibility of the business premises, the creative industry generally attaches more value to a representative interior than exterior. They want an inspiring creative working environment where innovation is stimulated.

Table 4: Preferred accommodation characteristics by three sub-sectors of the creative industries (Arkenbout, 2012)

A. Creative Business Service	B. Art	C. Media & Entertainment
Location		
Accessibility by public transportation	Accessibility by bike	Accessibility by bike
Accessibility by car	Accessibility by public transportation	Accessibility by car
Restaurant and café	Restaurant and café	Restaurant and café
Parking	Security	Security
Security	Accessibility by car	Accessibility by public transportation
Accessibility by bike	Other businesses	Parking
Other businesses	Parking	Other businesses
Quality of public space	Quality of public space	Quality of public space
Stores	Stores	Stores
Cultural facilities	Cultural facilities	Cultural facilities
Housing present	Housing present	Housing present
Building		
Multi-tenant building	Comfort	Multi-tenant building
Comfort	Multi-tenant building	Comfort
Interior finish	Layout flexibility	Interior finish
Small business units	Story height	Recognisability
Layout flexibility	Small business units	Small business units
Recognisability	Recognisability	Layout flexibility
Exterior appearance	Interior finish	Exterior appearance
Story height	Exterior appearance	Story height
Building shape	Building shape	Building shape
Energy use	Energy use	Energy use
Technical state	Technical state	Technical state
Supporting facilities		
Internet (wifi)	Security	Internet (wifi)
Meeting places	Meeting places	Security
Security	Internet (wifi)	Meeting places
Monthly rent-contract	Monthly rent-contract	Monthly rent-contract
Restaurant and café	Restaurant and café	Restaurant and café
Reception	Reception	Reception
Repro facilities	Repro facilities	Repro facilities
Cleaning service	Cleaning service	Cleaning service
Waste management	Waste management	Waste management
Catering vending	Catering vending	Catering vending
Textile care	Textile care	Textile care

User preferences regarding supporting facilities
The creative industry ascribes value to facilities and services included in the rent, such as internet (wifi), security and meeting places. Offering business support and flexibility are important for the choice of business premises for young business organisations in the creative industries. Facilities that are more related to functional aspects are less important when choosing a business location and score lower in importance.

c. Comparison between characteristics of structurally vacant buildings and user preferences

When comparing building and location characteristics of vacant properties according to Remøy (2010) to the user preferences found in both empirical studies, a mismatch is found between the characteristics that describe preferred properties and the characteristics that describe structurally vacant office properties (Table 5). The comparison shows that several of the user preferences are not met by structurally vacant office buildings. A representative location is specifically important for large-scale office organisations, while facilities in the location are important for creative organisations. Comparing the building characteristics, functional obsolescence is a characteristic of structurally vacant office buildings, while it is measured by several factors that are important for the user preferences. Likewise, glass, facade, low quality interior and technical decay are also measured by several user preferences factors that are important for large-scale and creative organisations accommodation preferences.

Table 5: Comparison between characteristics of structurally vacant buildings and user preferences

Characteristics vacant properties	Office user preferences
year of construction between 1980 and 1995	Year of construction is a proxy for other factors, and not measured as user preference
location with insufficient facilities	Restaurants and cafés no 3 location characteristic for creative organisations
low status locations	Representative location no 3 characteristic for large-scale organisations
Mono-functional locations	Multifunctional location no 7 and 8 characteristic for large-scale organisations, no 3 and 7 location characteristic for creative organisations
less parking places than surrounding buildings	Parking no 5 location characteristic for creative organisations, no 11 characteristic for large-scale organisations
functional obsolescence	Represented by no 2, 3 and 5 building characteristic for creative organisations, no 3 and 6 for large-scale organisations
glass facades	Represented by no 6 for large-scale organisations
low quality interior	Represented by no 2 and 3 building characteristic for creative organisations, no 2, 3 and 15 for large-scale organisations
technical decay	Represented by no 3, 7, 9 and 10 building characteristic for creative organisations, no 2, 3, 4 and 6 for large-scale organisations

Conclusion and discussion

The accommodation preferences of large scale office organisations showed to be rather steady but also partly changing over time. Appearance, organisational considerations, expansion possibility and accessibility were mentioned by all studies. The accommodation preferences of the creative industry were less often described, and were limited to factors describing flexibility of contracts, need for meeting places and facilities stimulating cooperation. As the number of companies in the creative industries is increasing, and the creative industries are thought to be trendsetters for other sectors, this paper focused on describing the creative industries' accommodation preferences, and making a comparison with the accommodation preferences of large scale organisations.

Comparing the results from the literature review to the expert interviews with large scale organisations and the Delphi study and survey among creative industries clearly showed that traditional factors like insufficient accessibility by car, lack of extension space, and poor location and building image remain important push factors. The interviewed organisations ranked environmental issues like reducing energy consumption, better accessibility by public transportation, and other sustainability issues high on their list of prioritised pull factors. Regarding the creative industries, accessibility by public transportation and by bike, multi-tenancy, and ICT and meeting facilities are most important. These issues were much less marked as highly important in former studies on push and pull factors and also less emphasized in the interviews with large organisations. It is not clear whether or not the creative industries are fore-runners predicting changing user preferences of large scale organisations, or whether creative industries change preferences once they grow and become more established firms.

The relocation arguments of large scale organisations show that sustainability is playing an increasingly important role in decision making. This factor was not found in studies from the eighties and nineties and also less striking in the study by Boelens in 2008, but also came to the fore in the study of Appel-Meulenbroek (2008).. At a first glance new construction appears better suited technically and financially to meet sustainability demands than renovation of existing buildings. However, the demand for sustainable offices is much greater than can be achieved by the low annual addition to new. Reuse or adaptation of existing buildings ensures big savings on building materials waste and transport when compared to demolition and new construction (Wilkinson and Remøy 2011; Jansz 2012).

Large buildings with sufficient services, possible to subdivide into separately lettable units, with sufficient parking and a facade that can be adapted to a modern external appearance are most likely to be adapted or converted. Only few vacant offices in central urban locations have characteristics that make adaptation difficult to realise. Buildings on an office/distribution location however, are less easily adapted, because of their location characteristics. However, the adaptations of large scale buildings for the creative industries have shown that also this kind of adaptation is possible. The large size and possibility of attracting a substantial number of companies and users seem to be critical success factors.

This study is one of the first studies that compare the accommodation preferences of large scale organisations with the preferences of different creative industries also considering risk of vacancy and the opportunities and risks of adaptive re-use. However, the empirical research is limited to the Dutch office market and the number of interviews with large organisations is rather small. Further research using similar interviews is needed to get a more complete picture and to explore similarities and differences in preferences of organisations from different sectors such as offices, health care, retail and leisure, and industry. Another interesting issue for further research is the impact of societal resistance against leaving a vacant office behind due to a move to a new building. In a current study by Mentink (2014), the fear of image damage by leaving a vacant office behind showed to play an important role in the decision to stay or go and - in case of relocation - the choice between moving to an existing building or a new building, though financial factors still dominate the decision-making process. Experts expect a further increase of vacancy. When this expectation comes true, the need to limit new construction in favour of renovation and adaptive re-use of the existing stock will increase as well. A well-balanced decision-making process that includes both costs and quality and societal impact will become more important than ever.

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