

officernd

# The 2025 Flex Space Tech Stack Report

Survey-Based Insights on Essential  
Tools and Emerging Trends



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# Executive Summary

As a coworking operator, you face an ever-evolving technology landscape filled with dazzling options - from accounting and CRM systems to network management, access control, and beyond. Our 2025 Tech Stack Survey of 230 flex space operators provides a comprehensive view into:

- **What you're using today**

Top software by category and the most popular vendors across all segments.

- **What challenges you feel most acutely**

Integration gaps, member adoption hurdles, staff training, and more.

- **Where the market is headed**

AI experimentation, best-of-breed preferences, and emerging priorities.

- **Actionable recommendations**

6 strategic moves to sharpen your tech roadmap, boost member satisfaction, and protect your margins.

Read on for a deep dive into each category - unvarnished data, clear trends, and practical guidance to help you make confident technology decisions in 2025 and beyond.



# About OfficeRnD

OfficeRnD helps coworking and flex space operators streamline operations and grow their businesses with a powerful platform. It simplifies member management, bookings, billing, and space management while enhancing the member experience.

Founded in 2015, OfficeRnD powers 3500+ flex space locations worldwide, employs 150+ people, and operates from five global offices, including its headquarters in Boston.





# Data Overview

Before we dig into specific categories, let's set the stage:

- We surveyed 230 of our global coworking space clients, spanning a diverse array of sizes and locations, to gain a comprehensive view of the flex space market.
- Data was gathered via three sources between 2024 and mid-2025.

## Why it matters to you

You're not alone. This report reflects a representative cross-section of the market, from boutique coworking brands to large enterprise-scale operators, so these insights should resonate whether you run a single-site space or a global portfolio.



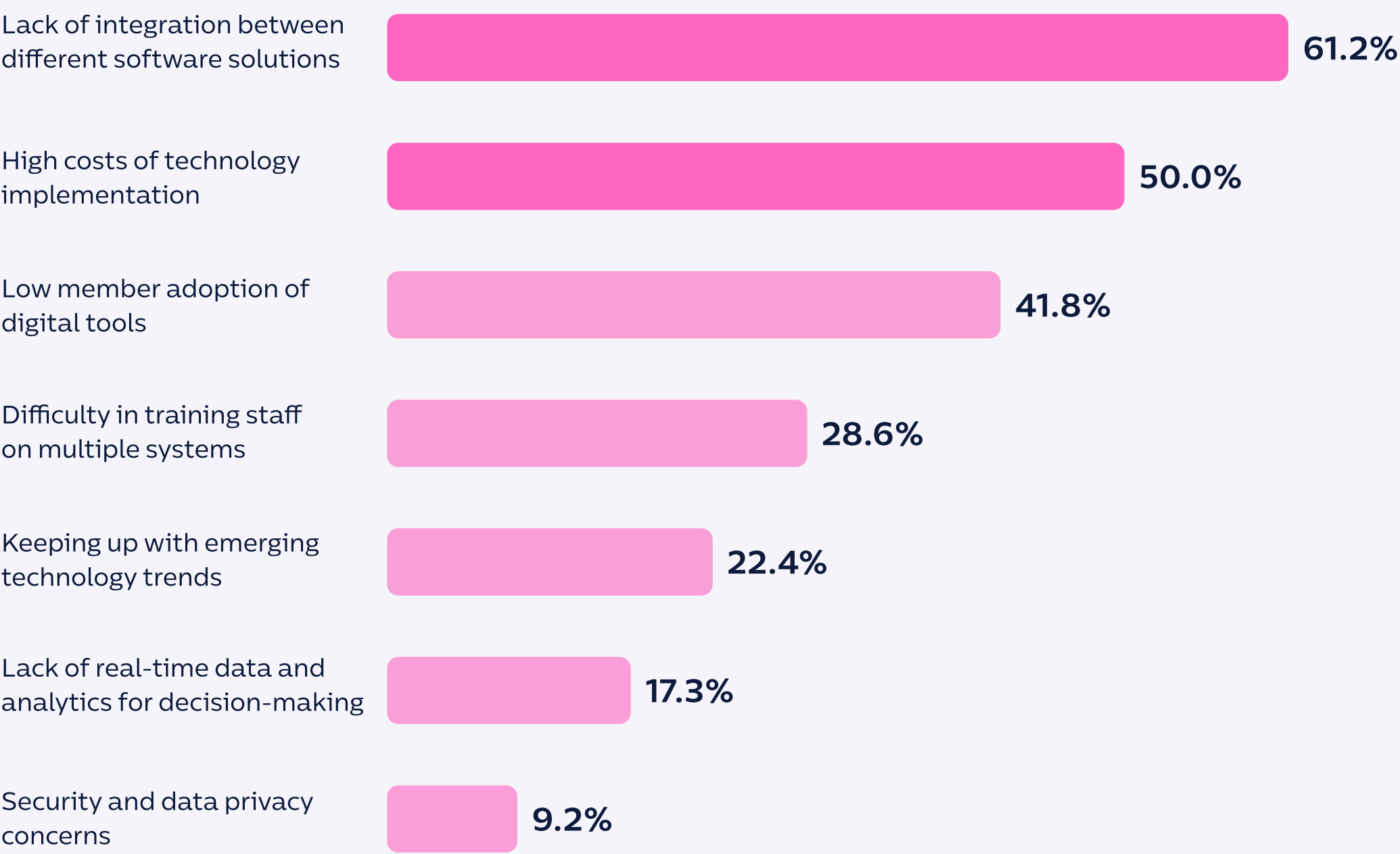
# Top Technology Challenges

Understanding the top technology challenges is essential for flex space operators aiming for operational excellence. These insights reveal critical pain points such as integration gaps, high implementation costs, and low adoption rates, enabling proactive strategies to boost efficiency and member satisfaction.

# Top Technology Challenges

Understanding the hurdles your peers face helps you prioritize where to invest. When asked to select all challenges that apply, the respondents reported:

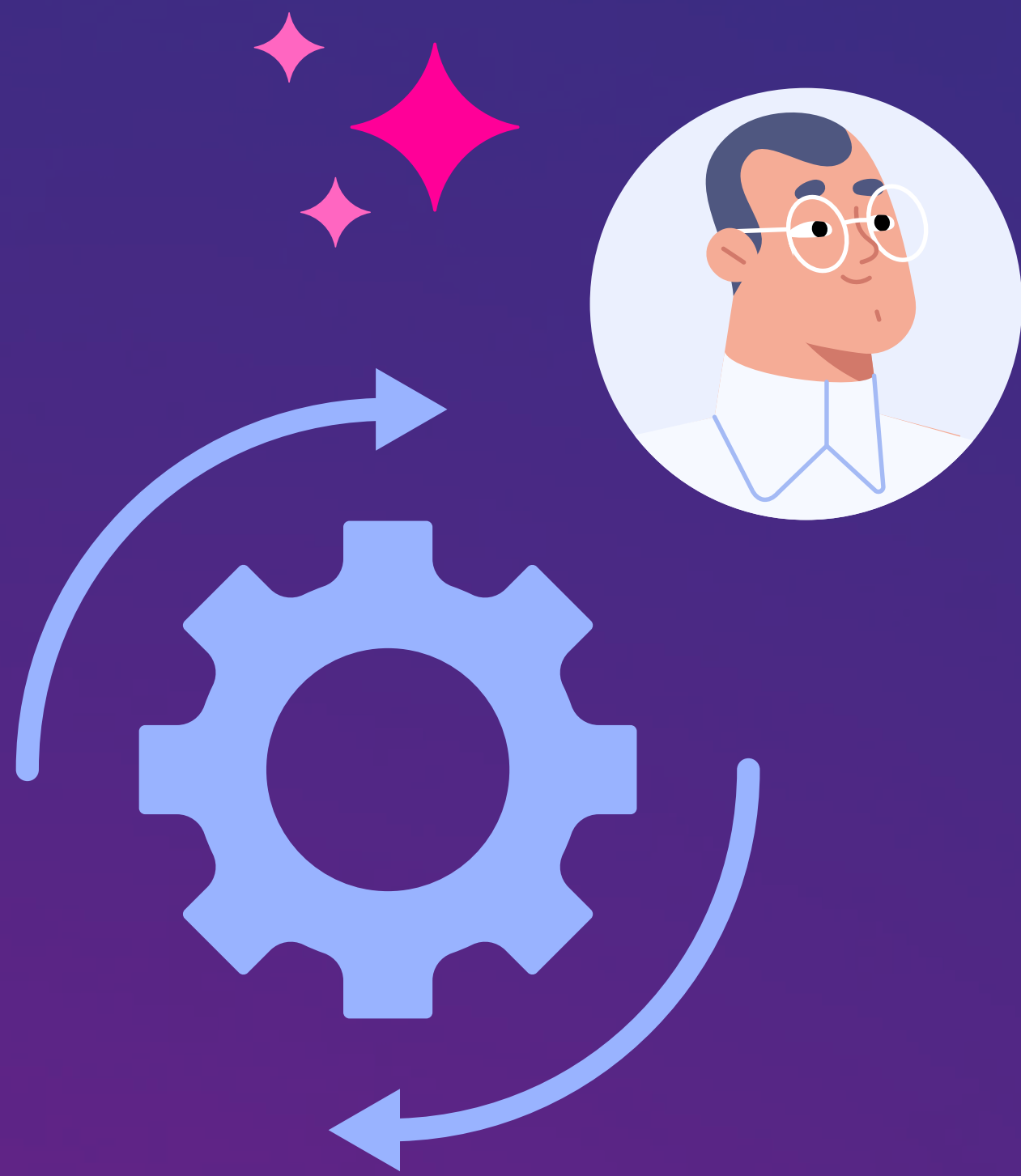
## Technology Challenges



## Key Takeaways

- **Integration gaps** top the list - 61% of operators struggle to get their platforms talking to one another.
- Half of the respondents mention high costs of technology implementation as their primary struggle
- **Member adoption** of new tools is also pressing: 42% cite this as a barrier to realizing value.
- **Staff training** (29%) and **keeping pace with emerging tech** (22%) round out the top four.
- While **security/privacy** concerns lag (9%), they remain a meaningful factor for a niche of operators.





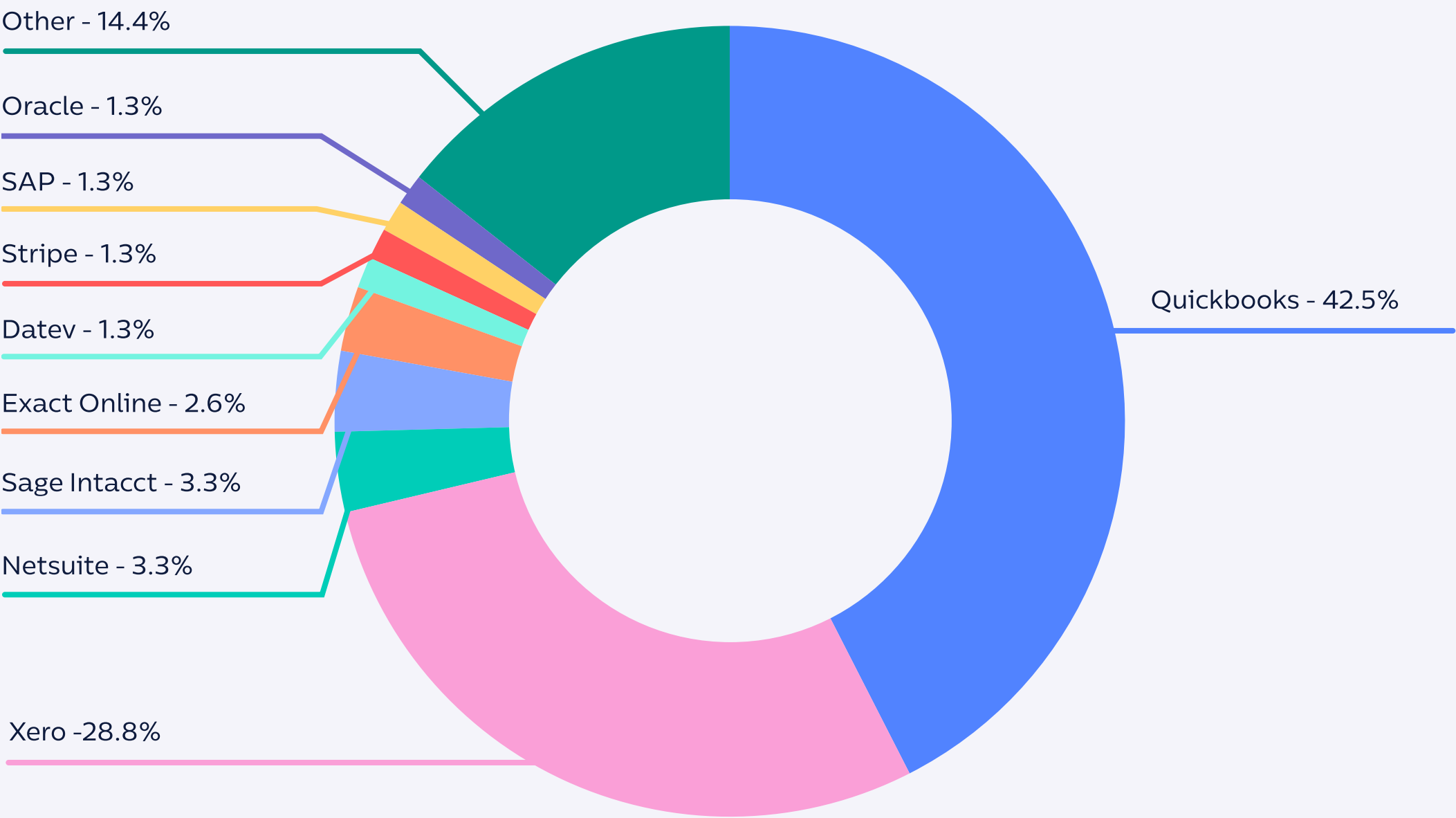
# Core Operations Software

Below, we break down each major software category by usage share, highlighting the top 2–3 most used solutions and noting a small-share outlier when relevant.

You'll see where the market is most concentrated, and where fragmentation or opportunity remains.

# Accounting Software

## Accounting Software



### Why This Matters

For any coworking operator, accurate financials are mission-critical, and that starts with using dedicated accounting software. With precise, up-to-the-minute bookkeeping and automated reconciliations, your software can spot revenue trends, control costs, and allocate resources effectively, ensuring you hit growth targets and maintain healthy margins.

### Key Takeaways

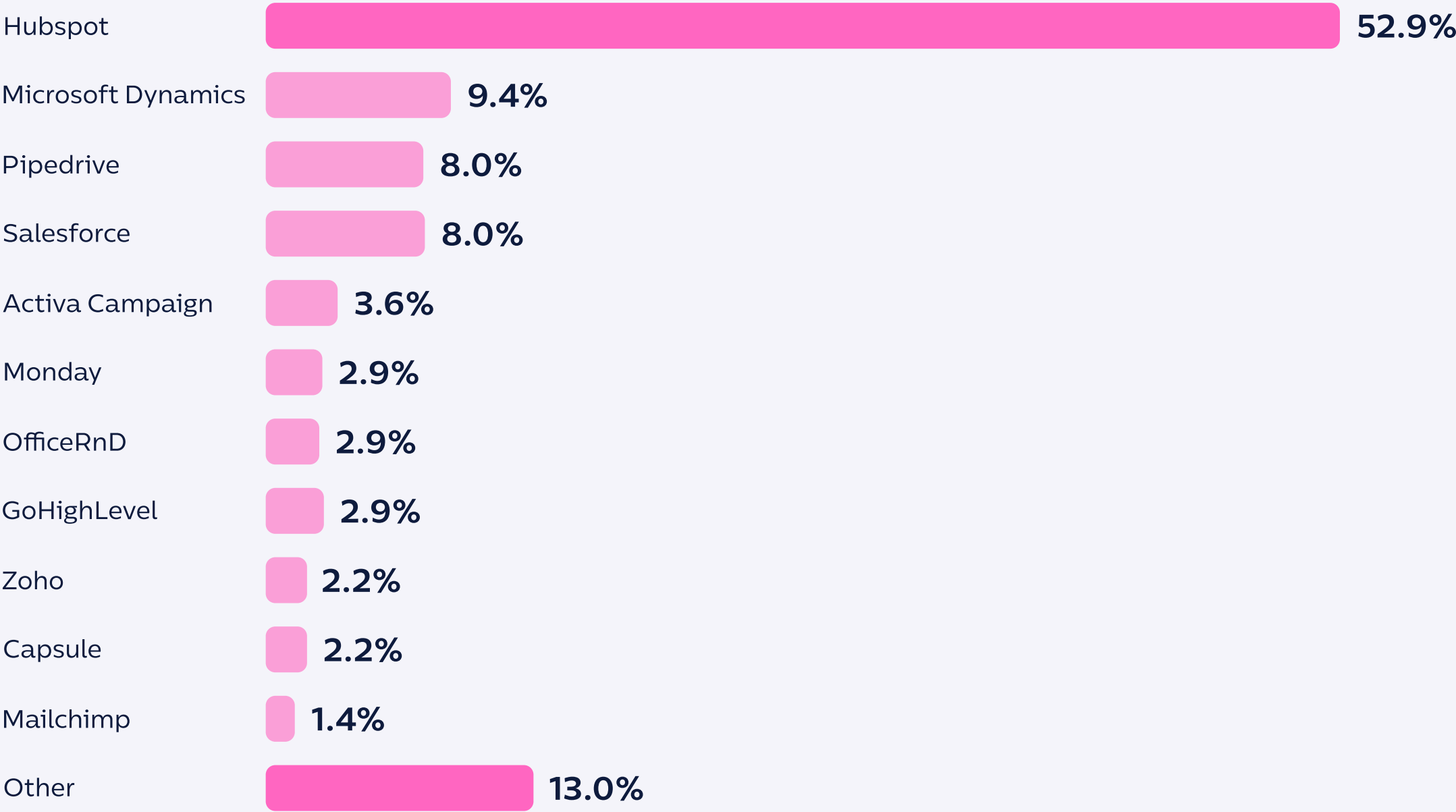
- QuickBooks leads with 42.5% market share, followed by Xero at 28.8%. Together, these two cover 71% of operators.
- NetSuite, Sage Intacct, and Exact Online (each  $\approx 3\%$ ) capture mid-market demand.
- The market is fragmented, a long “tail” of  $\sim 17$  smaller accounting vendors splits the remaining 32%.

### Did You Know?

OfficeRnD Flex easily integrates with Sage Intacct, QuickBooks, and Xero, providing you with a unified, real-time financial dashboard and automated billing workflows, eliminating manual data entry, accelerating month-end closes, and delivering the insights you need to boost occupancy and revenue.

# CRM Software

## CRM Software



### Why This Matters

Member relationship management underpins outreach, upsells, and long-term engagement, and the right CRM software is vital to make it work at scale. By centralizing every interaction, automating personalized campaigns, and tracking engagement metrics in one place, a dedicated CRM lets you nurture relationships, drive

renewals, and uncover upsell opportunities, all while minimizing manual follow-ups and ensuring no lead slips through the cracks.

### Key Takeaways

- HubSpot dominates with **over half** of operators (52.9%). Microsoft Dynamics (9.4%) and Pipedrive (8.0%) round out the top three.
- A small segment (1–2%) still uses email-marketing-only tools like Mailchimp - consider whether serving that long tail aligns with your needs.

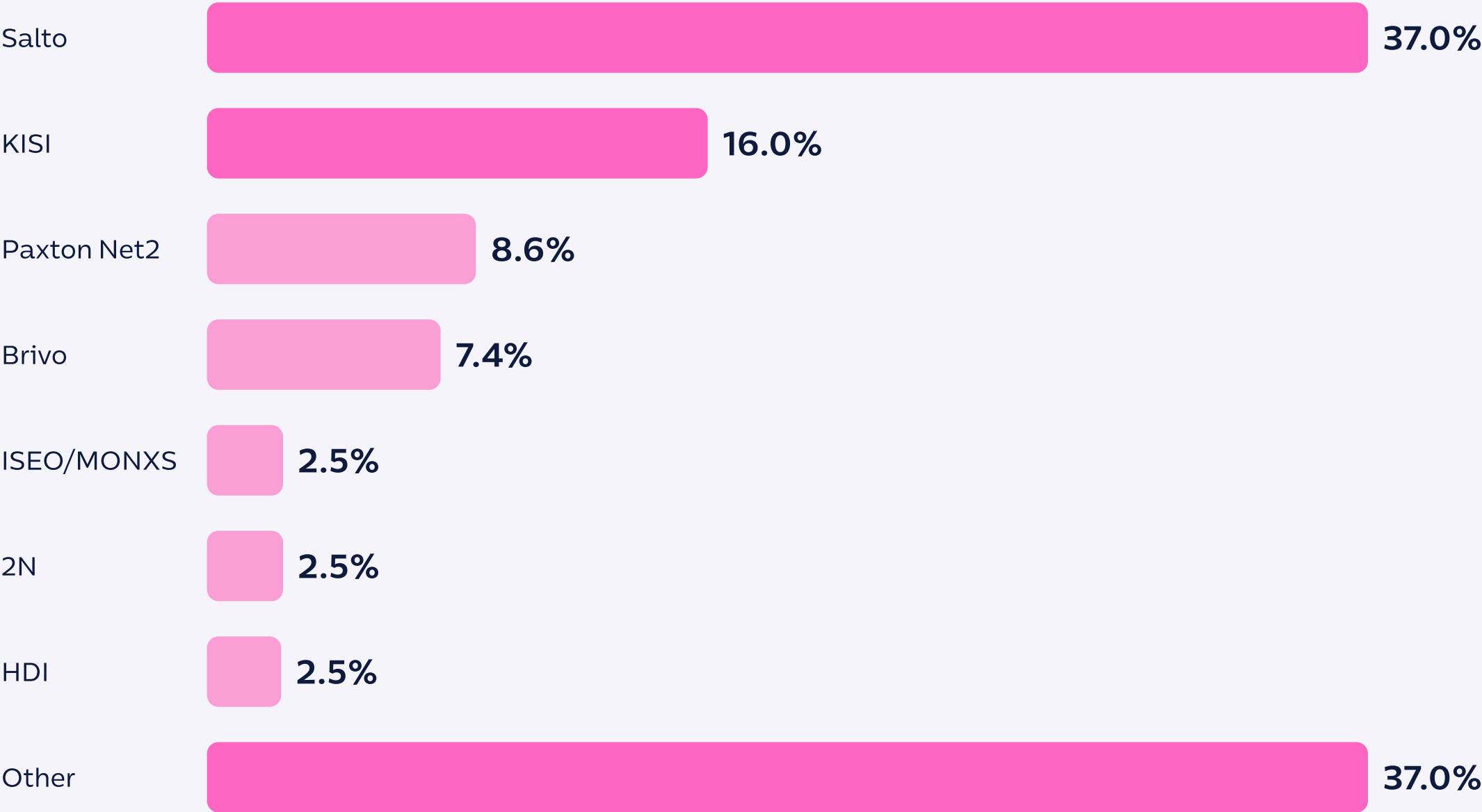
### Did You Know?

OfficeRnD Flex [integrates with HubSpot](#) to centralize member data and automate personalized outreach, giving you real-time engagement tracking, streamlined onboarding, and targeted upsell campaigns so you can deepen relationships, boost retention, and drive additional revenue with ease.



# Access Control Systems

## Access Control Systems



### Why This Matters

Access control is a core requirement for secure, 24/7 operations. By ensuring that only authorized members and staff can enter designated zones, you protect your space, assets, and community at all hours. A reliable access system also streamlines member onboarding and reduces front-desk workload, letting you focus on

delivering exceptional experiences rather than managing keys or fobs.

### Key Takeaways

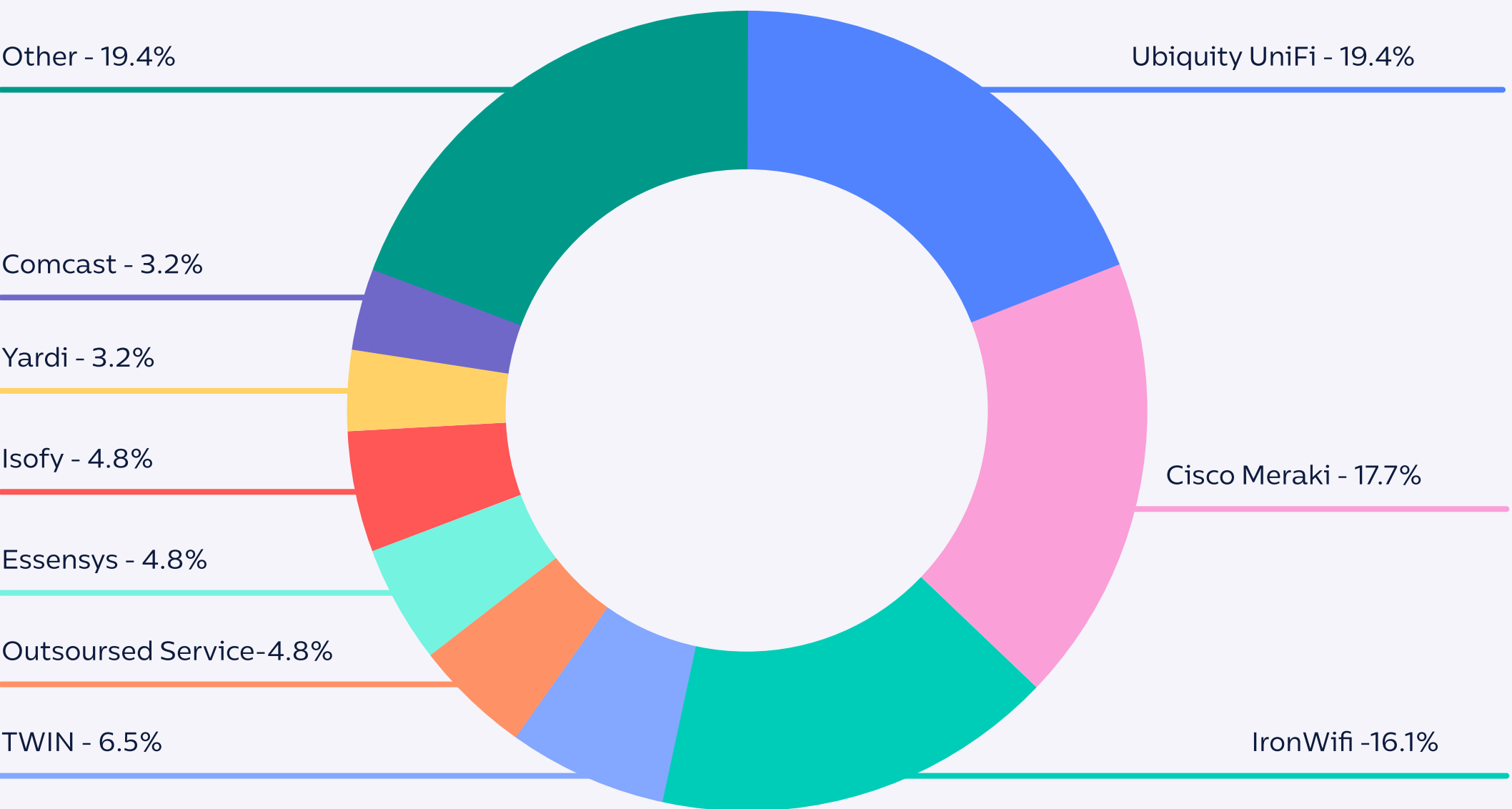
- Salto leads at 37%, followed by Kisi (16.0%) and Paxton Net2 (8.6%).
- With operators using over 35 different access control systems, you need a platform with flexible integrations that can accommodate your unique security protocols and keep your space running smoothly, no matter which solution you choose.

### Did You Know?

OfficeRnD Flex integrates with Salto, Kisi, Brivo, and Open Path to ensure seamless, centralized door management and secure 24/7 access for your members, facilitating administration and keeping your space safe around the clock.

# Network Management

## Wifi Management



### Why This Matters

Wi-Fi reliability and network security and performance are non-negotiable. Downtime or slow connections can drive members away and damage your reputation, while unsecured networks expose you to liability and data breaches. Investing in a robust, well-managed network not only keeps everyone productive and satisfied but also

demonstrates your commitment to professional, enterprise-grade service.

### Key Takeaways

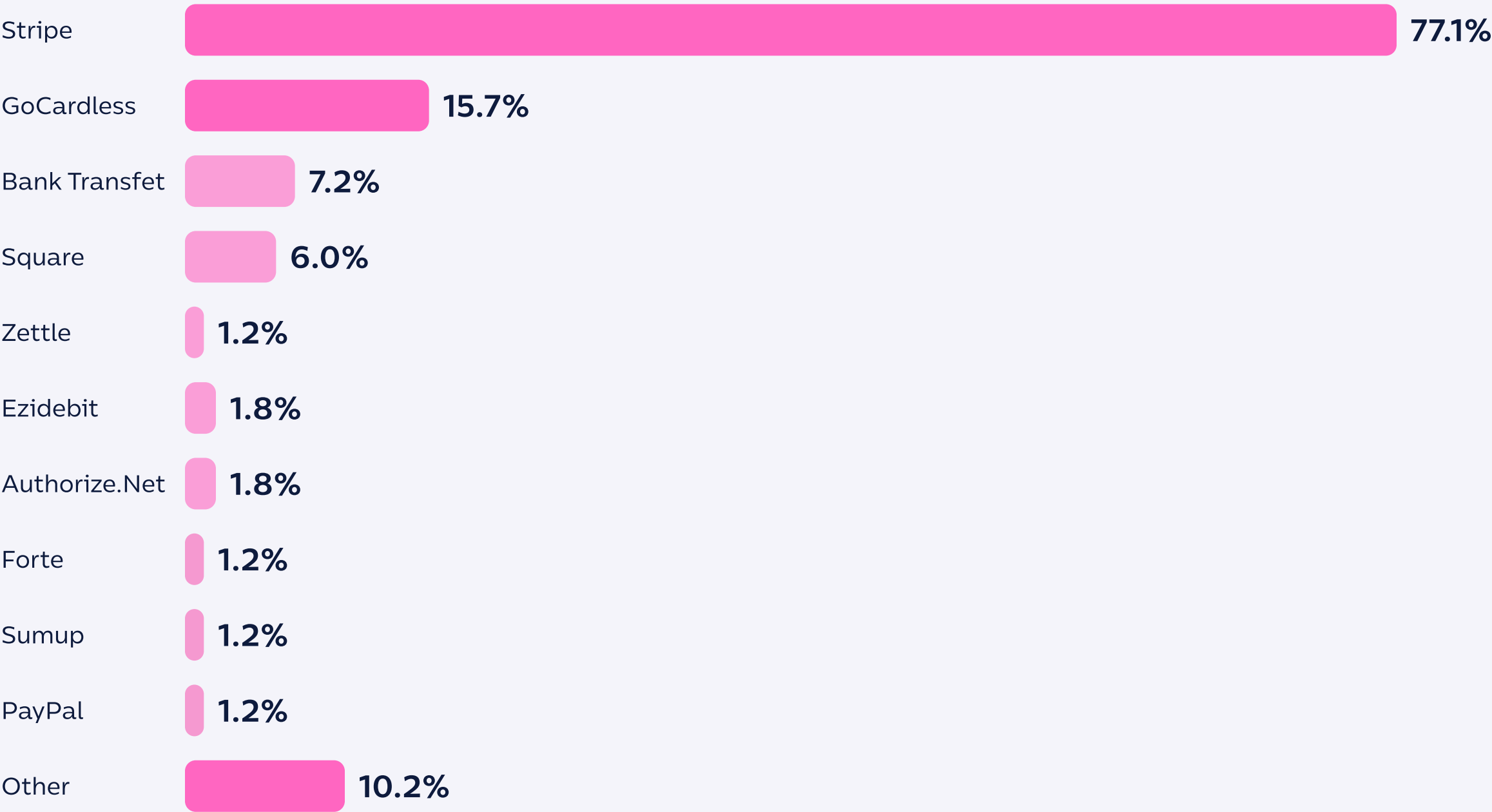
- Ubiquiti’s democratized hardware (19.4%) slightly edges Cisco Meraki (17.7%), with IronWifi close behind (16.1%).
- Partnerships and deeply integrated solutions provide a competitive edge in a highly fragmented space. Respondents use 20+ networking vendors.

### Did You Know?

OfficeRnD Flex integrates with IronWifi, twiindata, and isofy to provide centralized network provisioning, real-time performance monitoring, and enterprise-grade security, ensuring your members enjoy fast, reliable, and secure Wi-Fi without adding to your IT workload.

# Payment Gateways

## Payment Gateways



### Why This Matters

Seamless payments are table stakes. Seamless payments are table stakes. Members expect frictionless billing, from effortless sign-up and automated renewals to instant, transparent invoices, and any hiccup can erode trust and drive churn. A robust payment solution that handles proration, multiple currencies, and real-time reporting

not only boosts satisfaction but also ensures steady cash flow and eliminates manual reconciliation headaches.

### Key Takeaways

- Stripe dominates at 77%, followed by GoCardless (16%) for direct debit markets and manual bank transfers (7%).
- Surprisingly many respondents still use manual bank transfers as a payment gateway.

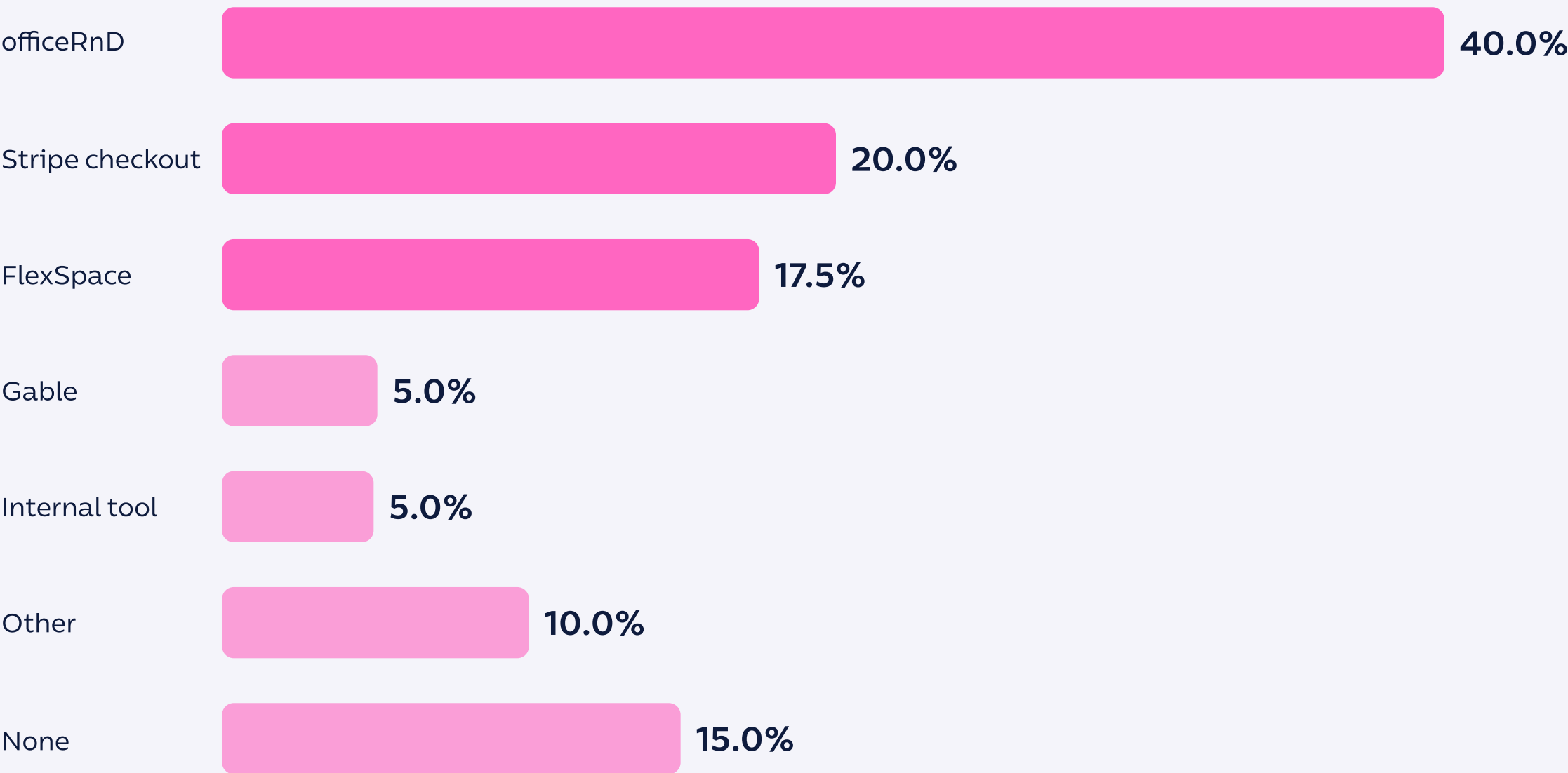
### Did You Know?

OfficeRnD Flex [integrates with Stripe and GoCardless](#) to streamline recurring billing and payment collection, reduce manual invoicing effort, and improve cash flow management.



# E-Commerce Solutions

## E-Commerce Solutions



## Why This Matters

Operators increasingly look to sell memberships, day passes, and add-ons online. E-commerce solutions on your website reduce friction by letting prospects purchase memberships, day passes, and add-ons instantly, on your website. By streamlining the buying journey, you capture more impulse sales, drive incremental revenue,

and free your team to focus on delivering exceptional member experiences.

## Key Takeaways

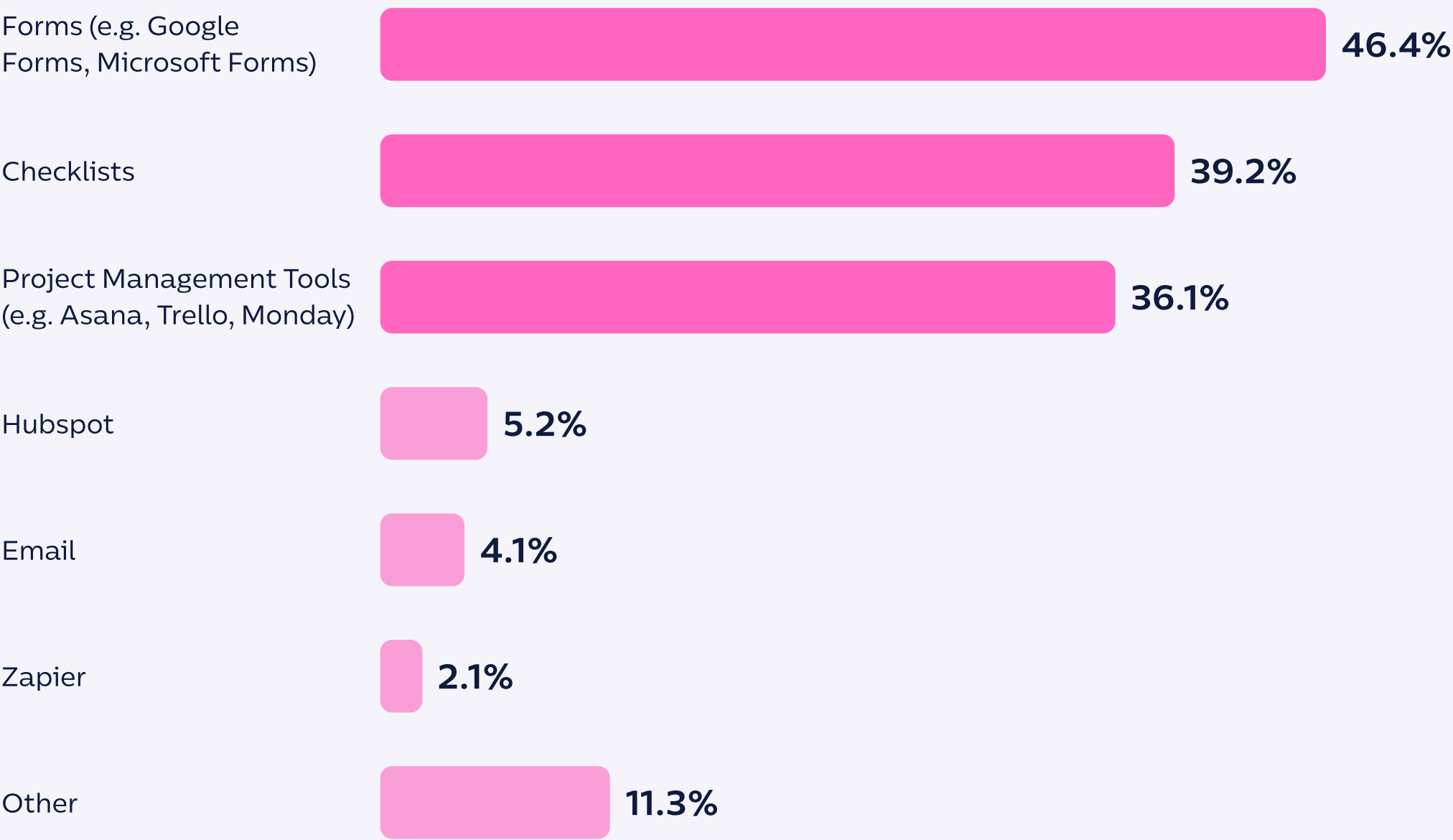
- OfficeRnD’s Growth Hub or Public Pages are the primary solution for **40%** of all operators.
- **Stripe Checkout** (20%) and **FlexSpace** (17.5%) are the next-most popular platforms.
- DIY internal solutions account for just **5%**, indicating operator preference for turnkey offerings.

## Did You Know?

The OfficeRnD Growth Hub enables you to turn your website into a powerful ecommerce engine, driving more revenue and significantly improving the member experience.

# Onboarding Tools

## | Onboarding tools



## Why This Matters

Streamlined onboarding forms and workflows set the tone for member experience. By automating essential steps, from identity verification to workspace selection, you minimize friction and make new members feel welcomed and confident from day one. This efficiency accelerates revenue recognition and frees your team to

focus on building community and delivering exceptional service.

## Key Takeaways

- Few operators pay for specialized onboarding tools, Zapier at just 2% is the lone paid integration of note.
- Nearly 47% rely on simple forms, 39% use checklists, and 36% prefer project-management apps.
- Embedding basic form integrations (e.g., Google Forms) into your platform may suffice for most.



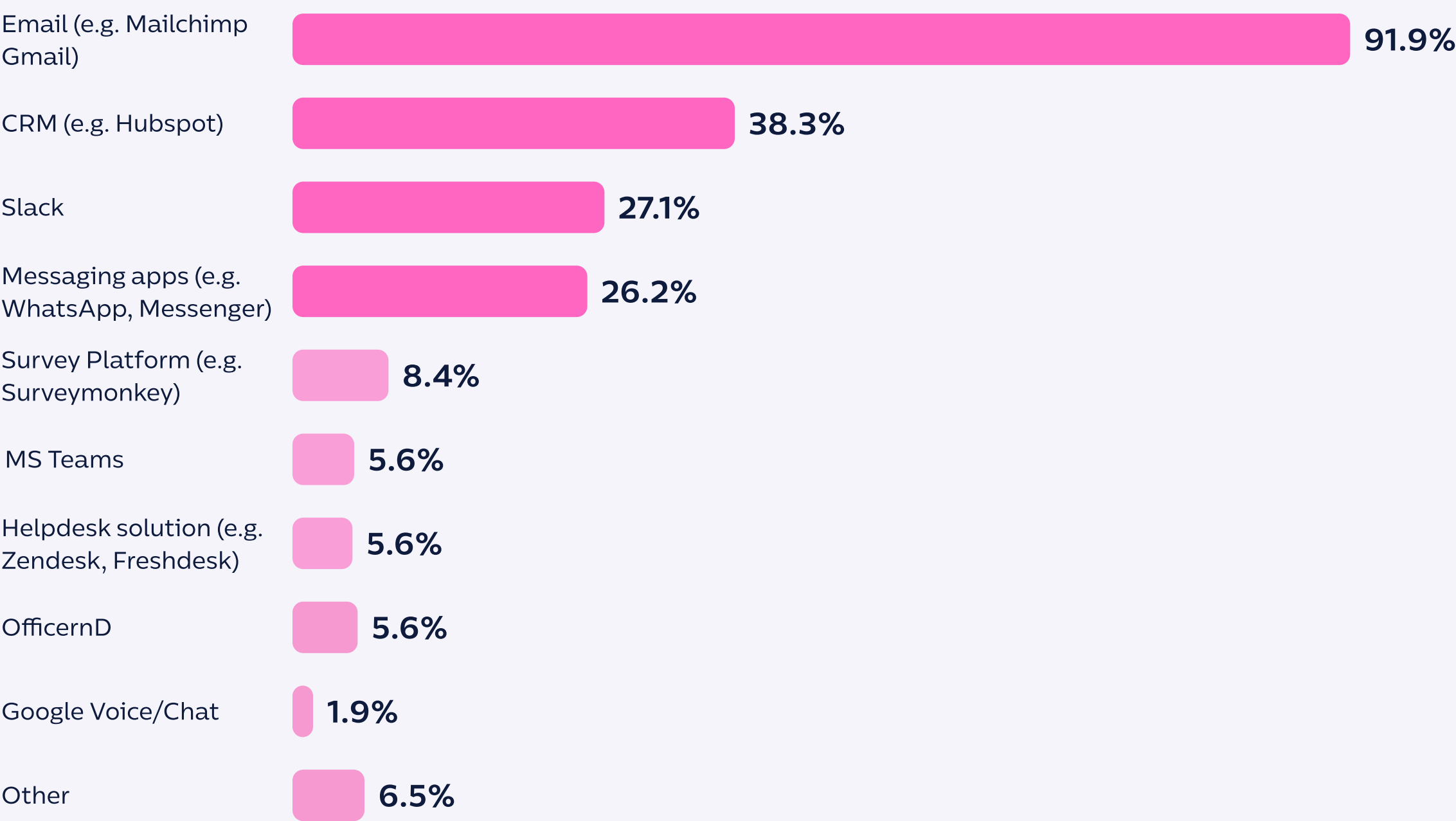
# Member Experience Software

The right member experience software helps coworking operators simplify daily operations and keep members satisfied. Choosing practical tools ensures smoother communication and stronger member relationships.



# Member Communication Tools

## Communication Software



### Why This Matters

Using the right communication tools like integrated email campaigns, in-app messaging, and push notifications ensures you reach members where they already are, keeping them informed of events, announcements, and support. Consistent, personalized outreach not only fosters a stronger community but also

demonstrates your commitment to service, driving higher engagement and member satisfaction.

### Key Takeaways

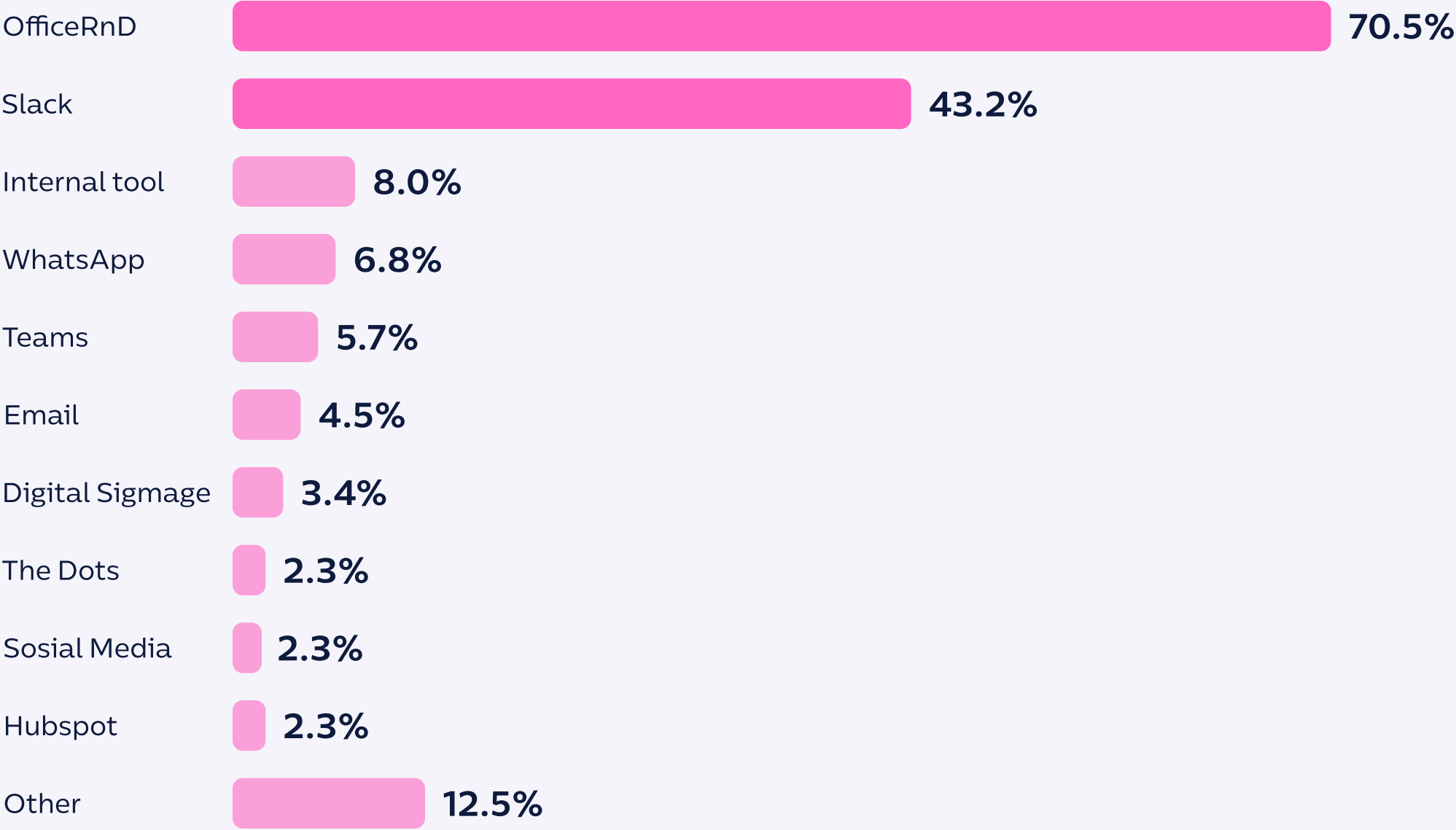
- 92% of operators use email, while 38% rely on Hubspot for CRM-driven messaging, and 27% use Slack.
- Helpdesk and specialized survey tools each sit at **5–6%** share, highly niche.

### Did You Know?

OfficeRnD Flex natively integrates with Slack to automate targeted announcements and improve member collaboration.

# Community & Collaboration Platforms

## Community & Collaboration



### Why This Matters

Fostering a sense of community is a core promise of coworking. By hosting regular events, facilitating peer-to-peer introductions, and providing dedicated social spaces, you turn a collection of desks into a collaborative ecosystem. A vibrant community not only enhances member satisfaction but also drives referrals and

long-term loyalty. More than half (52%) use OfficeRnD’s built-in collaboration features, while 42% rely on Slack channels.

### Key Takeaways

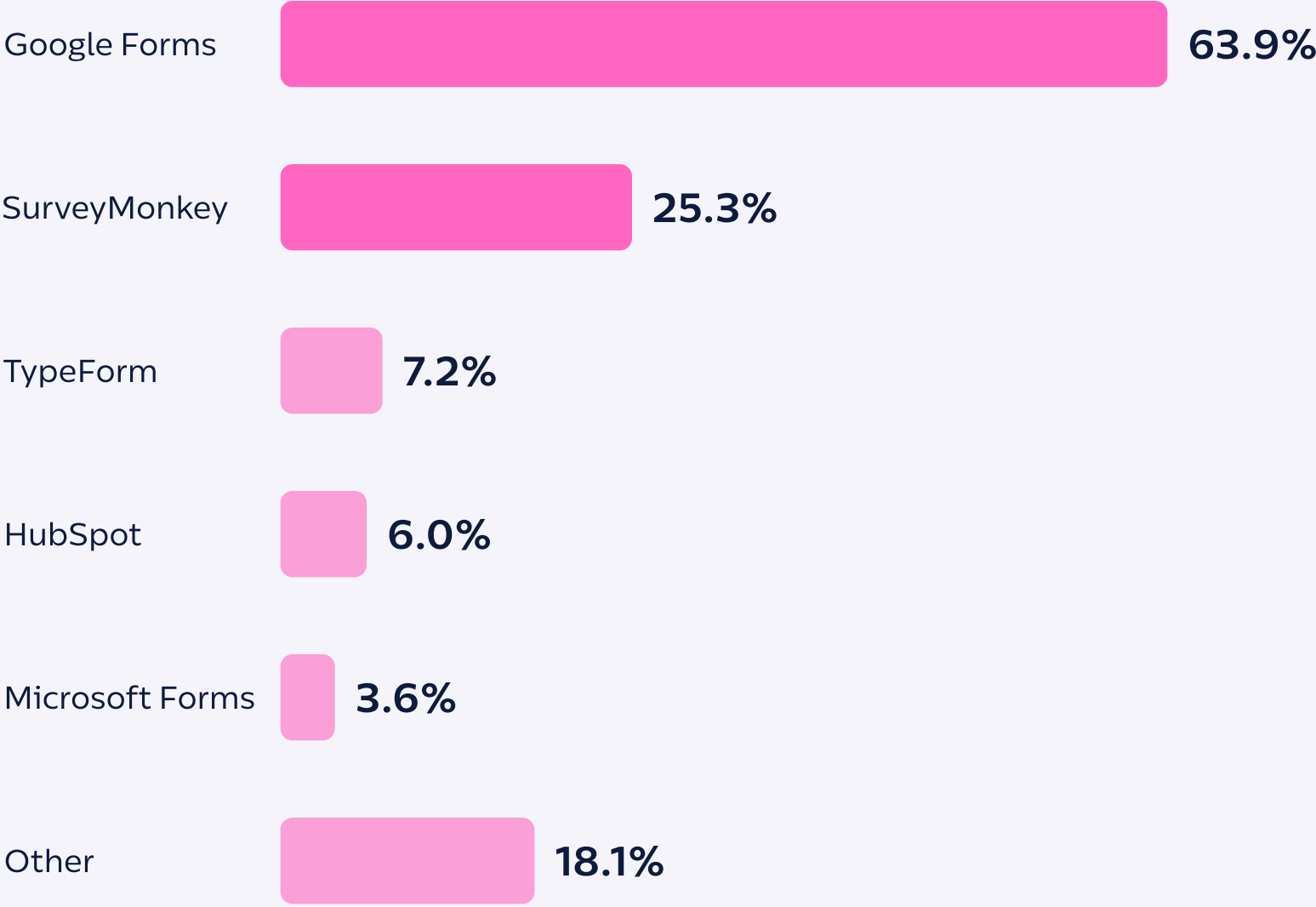
- To foster community and collaboration, most operators use their workspace management software and messaging tools like Slack.
- Only a small percentage of respondents prefer using specialized tools for collaboration and community building, signaling that operators value built-in engagement features within a unified platform, ensuring higher adoption, streamlined workflows, and a stronger, more connected member community.

### Did You Know?

The [Workplace in Flex OfficeRnD Integration](#) gives operators the ability to provide member companies easy-to-use booking tools for coordinating hybrid schedules and improving collaboration. Members can book desks and meeting rooms, plan weekly work schedules together, and invite teammates to the office – all from within the Member Portal.

# Member Feedback & Surveys

## Feedback Software



## Why This Matters

Member feedback and surveys inform you about your members' needs and perceptions, highlighting what's working, what needs refinement, and where new service opportunities lie. It's also crucial for improving your NPS score.

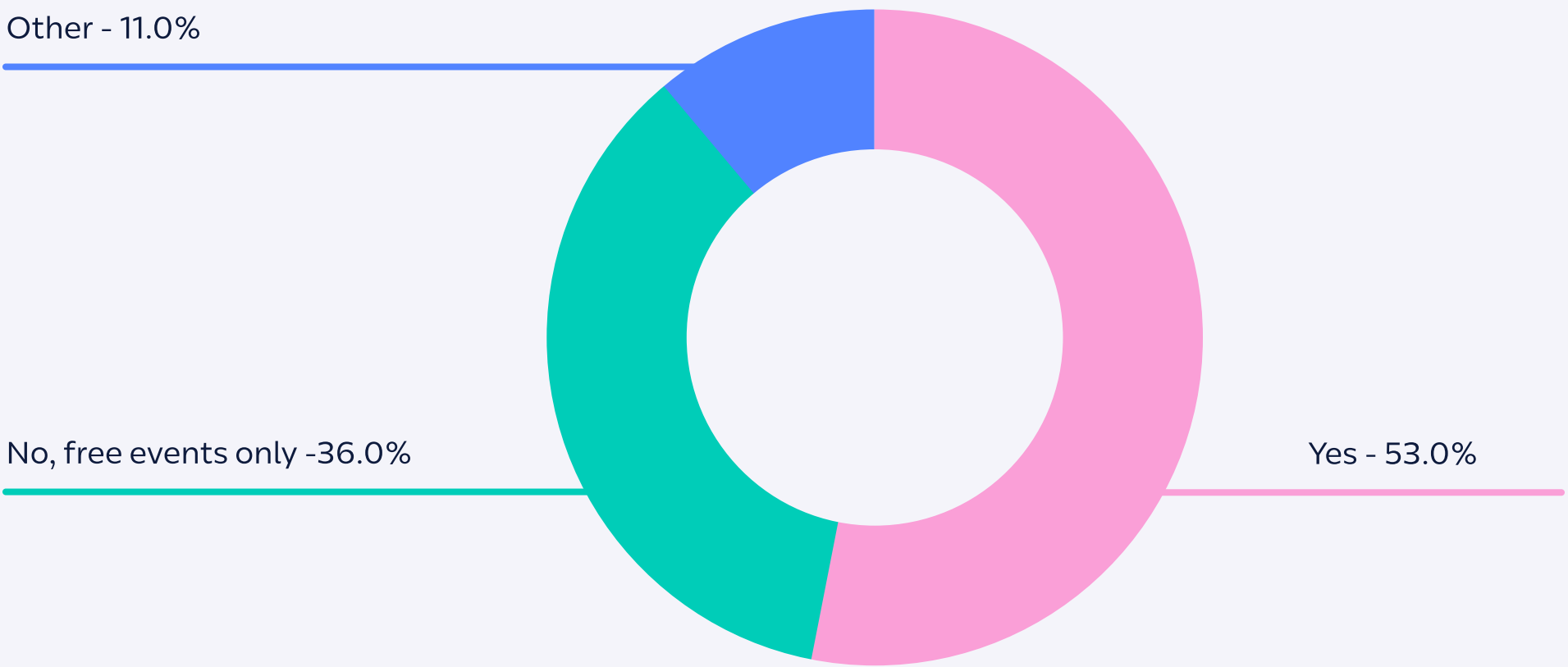
## Key Takeaways

- Nearly 64% of operators tap free Google Forms to gather feedback
- Other popular solutions include Hubspot, SurveyMonkey, and TypeForm.
- Nearly all survey tools in this space are free or low-cost and cover basic needs.
- Probably it makes sense to pursue a paid feedback solution if you can demonstrate clear ROI - most operators won't pay more than \$0–\$10 per month.

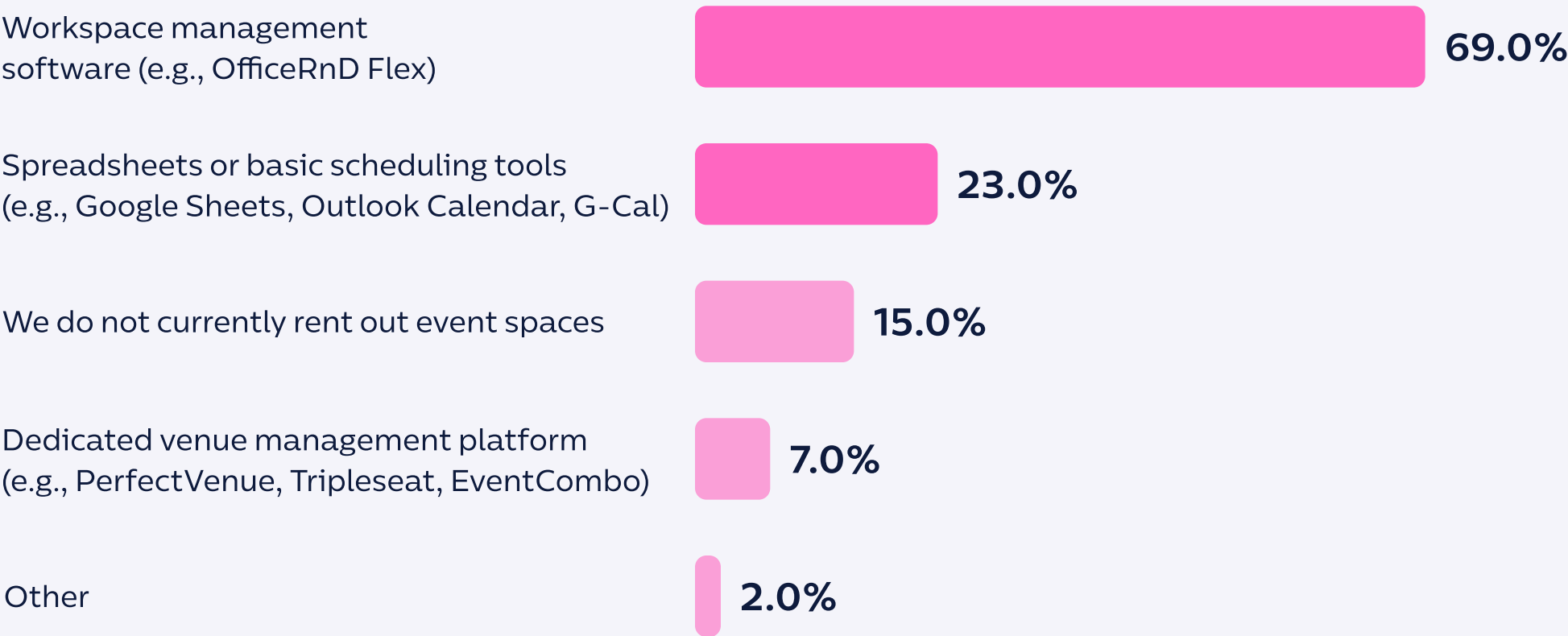


# Event management software

## Sell Event Tickets?



## Venue Management



## Why This Matters

Event management is crucial for orchestrating seamless, high-impact events that foster member engagement, showcase your space's value, and generate additional revenue through workshops, meetups, and sponsorships.



## Key Takeaways

- The majority of operators sell tickets for paid events in their spaces
- 69% prefer using their workspace management software for managing events, spreadsheets are the next most used method
- Only a small percentage of respondents rely on dedicated venue management platforms such as Perfect Venue or Tripleseat.



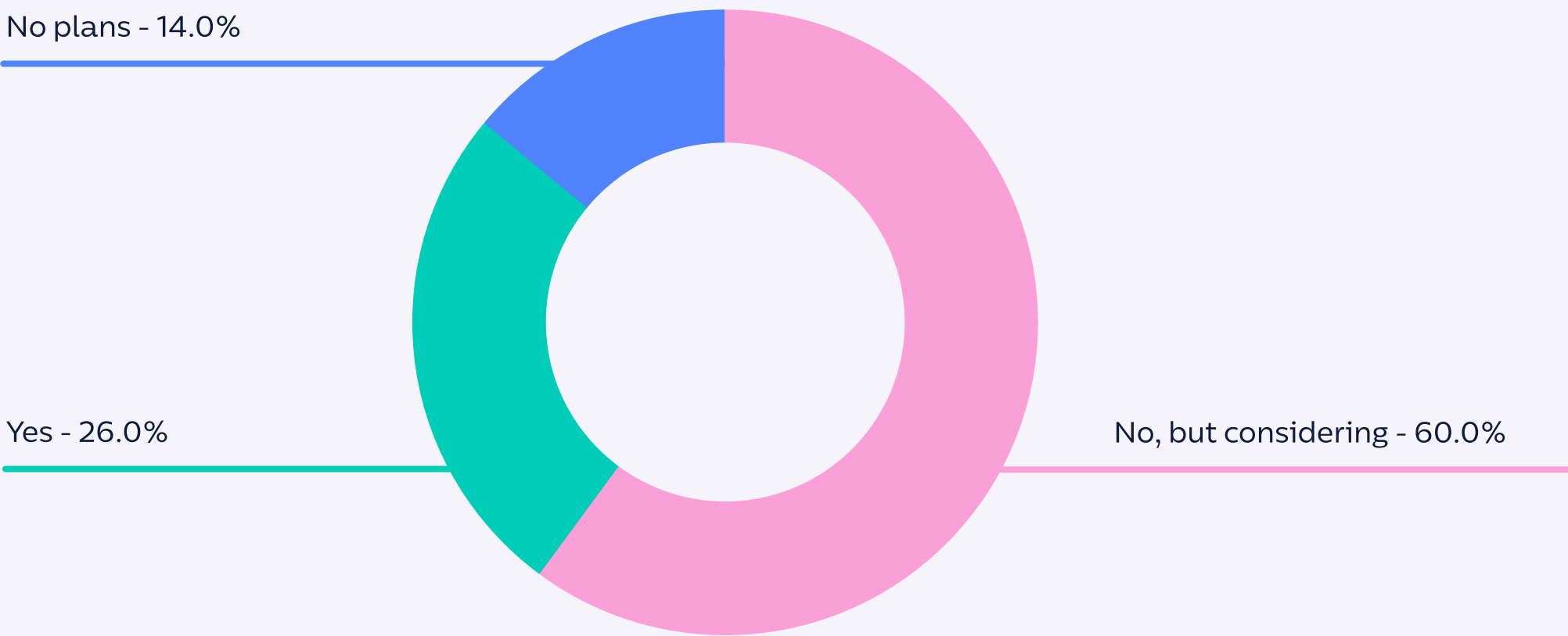


# Strategic Trends

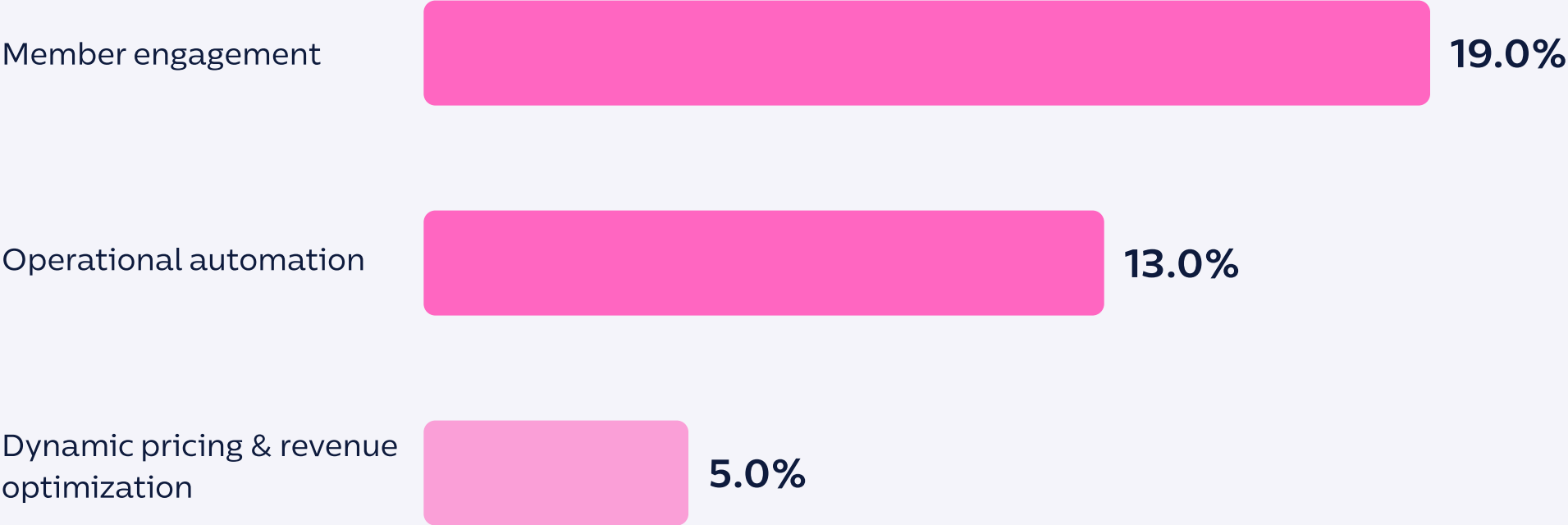
Beyond today's core stack, two cross-cutting trends are reshaping the market. Can you guess what the first one is?

# AI Adoption

## Do you currently use AI tools?



## What Do You Use AI Tools For?



## Why This Matters

AI in coworking could revolutionize operations by analyzing space-usage patterns to optimize layouts, automating routine administrative tasks like billing and access provisioning, and powering intelligent chatbots and personalized recommendations, enabling operators to boost efficiency, enhance member satisfaction, and drive sustainable growth.

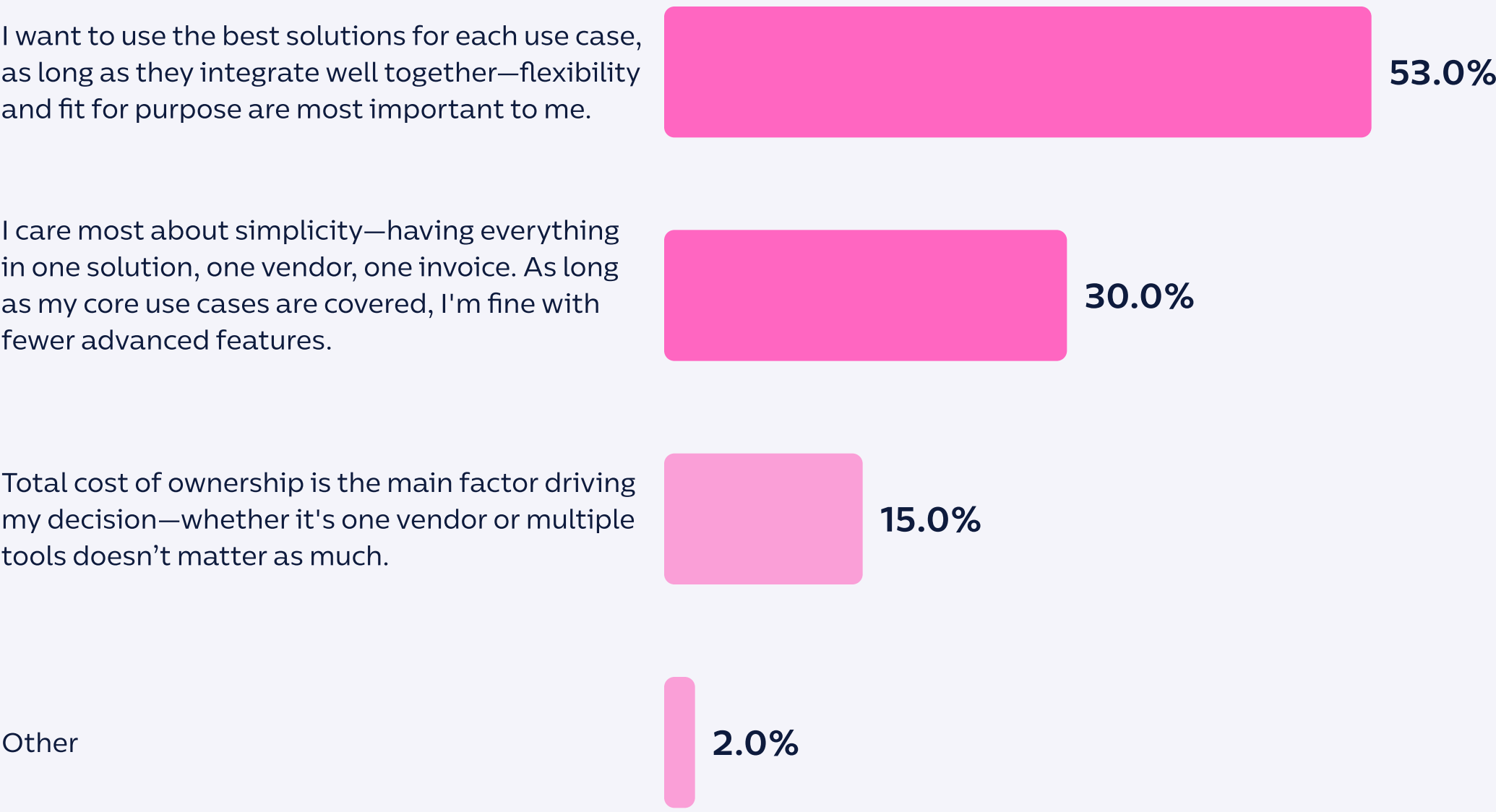


## Key Takeaways

- AI is top of mind for 60% of operators, 26% have active use cases, another 14% are in “consideration” mode.
- Member engagement workflows rank as the #1 AI application among surveyed operators.
- Lay the groundwork now by standardizing your data schemas and building internal AI literacy. Early pilots in chatbot-based support, automated scheduling, or personalized member recommendations will differentiate you as AI matures.

# Choosing Coworking Software

## Selecting Coworking Software



## Key Takeaways

- The biggest percentage of operators prioritize “best-of-breed” solutions for each use case as long as they integrate well, over monolithic platforms.
- Only 30% trade off advanced features for a single-vendor “suite.”



## Why This Matters

Choosing the right coworking management software is a strategic decision that can make or break your operational efficiency and member satisfaction, ensuring seamless integrations, automated workflows, and actionable insights so you can focus on growing your community and revenue.



# Data-Driven Recommendations



# Data-Driven Recommendations

Here are five laser-focused, data-driven moves you can make right now to sharpen your tech roadmap and amplify both member satisfaction and your bottom line:

## 1 . Lock Down Your Core Financials

- Integrate your accounting system with your coworking management platform to streamline billing and financial reporting, eliminate manual data entry, and gain real-time visibility into cash flow, so you can forecast accurately, reduce errors, and focus on growing your space.

## 2 . Unify Member Engagement with HubSpot

- HubSpot commands a 52.9% share in CRM. Consider connecting it natively to centralize member profiles, automate personalized drip campaigns, and track every upsell opportunity.
- By folding email marketing, in-app messaging, and Slack into one data hub, you'll drive higher open rates, stronger referrals, and measurable revenue lifts without juggling multiple tools.

## 3 . Build on a Truly Open Coworking Management Platform

- Operators use 35+ different access control systems and 20+ networking vendors. Choose a management solution that offers plug-and-play integrations for Salto, Kisi, Brivo, OpenPath, Cisco Meraki, IronWifi, and more.
- Likewise, ensure your payments (Stripe at 77% dominance), e-commerce engine, and onboarding forms all flow through the same backend - this “one-pane” approach eradicates integration gaps (61% cite this as their top challenge) and slashes staff training time.

## 4 . Leverage Built-In Community & Collaboration

- Over half of operators rely on native collaboration features (52%) versus niche platforms. Ask yourself if embedding peer introductions, event RSVPs, and feedback surveys directly into your member portal will have a positive impact on your operations.
- Streamlined, in-app engagement tools drive higher adoption (50% of operators struggle with member uptake) and turn every touchpoint into an opportunity for upsells and loyalty.

## 5 . Start Small, Scale Smart with AI

- Sixty percent of operators are eyeing AI, but only 26% have active use cases. It makes sense to pilot lightweight projects like chatbot-based support or automated scheduling to prove ROI.
- Standardize your data schemas now so you can layer on more advanced analytics, space-usage optimization, dynamic pricing, and personalized recommendations—without reengineering your stack later.



### **Disclaimer**

These recommendations are offered as guidance based solely on survey findings. You should always evaluate your own operational requirements and use cases before making any technology decisions.

# Forward-Looking Insights



# Forward-Looking Insights

Looking ahead, the coworking technology landscape will be defined by:

- **Data-First Platforms**

Operators will demand real-time analytics and embedded BI dashboards—covering utilization, drop-in flow, net promoter scores, and more.

- **Composable Workspaces**

As the “best-of-breed” philosophy prevails, platforms must become more composable: a lightweight core plus a rich app marketplace. Think “WordPress meets Salesforce AppExchange” for coworking

- **AI-Augmented Operations**

By 2026, AI will shift from experimental to essential - automating everything from dynamic pricing to space-usage predictions. Early adopters could see measurable improvements in occupancy and member satisfaction.

- **Ecosystem Partnerships**

True differentiation will come from curated ecosystems: banking partners for embedded finance, HR platforms for corporate members, and wellness apps for community engagement.

- **Security & Privacy as a Feature**

While only 8% cite it today, rising regulations (GDPR, CCPA, ISO27001) will make robust security and privacy compliance a competitive advantage, not just a checkbox.



# OfficeRnD Flex

## Your Best Friend In Managing Your Space Efficiently

We believe technology is paramount in helping operators meet the rapidly changing demands of today's flex space industry. That's why we're constantly improving OfficeRnD Flex.

With our platform, you can easily automate administrative processes, keep track of memberships and contracts, manage meeting room bookings, automate billing and payments, and much more.

Recent updates to OfficeRnD Flex include seamless visitor management and the ability to embed an ecommerce storefront directly into your website, enabling you to boost revenue. Spend less time on operations and more time creating exceptional experiences for your members.

[Learn more](#)

