

CLIENT SURVEY

2017

**MatchOffice
presents this
year's client survey**

This year, more than 1,000 clients from 25 countries have participated in our survey. The responses we have received provide valuable industry insights from the clients' point of view. Get all the data and analysis you need, right here.

Table of Contents

Introduction	3
Key Results	4
1 : Have you ever used a serviced office?	5
2 : What sort of contract do you have?	6
3 : How many people from your firm are using your serviced office?	7
4 : Do you plan to renew your contract?	8
5 : What length of contract did you sign?	9
6 : Which of your office's facilities do you use?	10
7 : Which services are the most important to you?	11
8 : What are the disadvantages of serviced offices?	12
9 : What made you choose a serviced office over a traditional one?	13
10 : Why did you choose the serviced office you currently use?	14
11 : What would increase the value of your serviced office?	15
12 : How well does your serviced office meet your expectations? ..	16
About MatchOffice	17

Introduction

For the third time, we present an extensive survey on the clients of European flexible workspaces. It is a natural follow-up on our **Industry Survey** report, which asked flexible workspace providers worldwide about occupancy rates, prices, general attitude, etc. We aspire to provide you with valuable data in an increasingly competitive market, and these reports allow a multi-aspect industry analysis and help predict future trends.

This year, 1054 clients in 25 countries have contributed to our report. It aims to identify how client preferences and satisfaction, type and length of contract and business needs have changed since 2016.

The demand for flexible workspaces is even higher this year. For over 60 % of clients it is a new type of rent, and apparently, part of them preferred it over traditional offices. We are heartened to see that flexible workspaces are getting more recommendations as well as lengthy leases. Almost 20 % of clients sign a contract for 1-2 years or even longer. Also, many of them tend to prefer offices with networking possibilities. With this knowledge, you can plan growth directions for your business and cater for the needs of your clients in the best way possible.

We sincerely hope that you will enjoy reading and benefit from our survey, and we wish you prosperity and reaching new heights in the year to come.



Jakob Dalhoff
CEO, MatchOffice



Key Results

Our findings.

First Impression

This year, we can see that even more clients are focused on business etiquette and workspace aesthetics. They do not want their visitors to wander in search of their office. A friendly receptionist who will create a hospitable atmosphere is a necessity for almost half of the respondents. Creative office design inspires clients, entertains their guests and generally brings more joy to everyday work. However, office space must be not only beautiful but functional, there is an increased need in lounges for employees to be able to both relax and have a meeting.

Community

Even though client satisfaction is high, the survey results give providers food for thought. A good example is networking, it is not enough to just allow some areas where clients from different companies can communicate informally, - engaging activities, dedicated events, and parties will greatly improve the process. It is worth it as community spirit benefits everyone. Entrepreneurs often get inspiration in success stories of their neighbors, purchase products and services from each other, and closely cooperate.

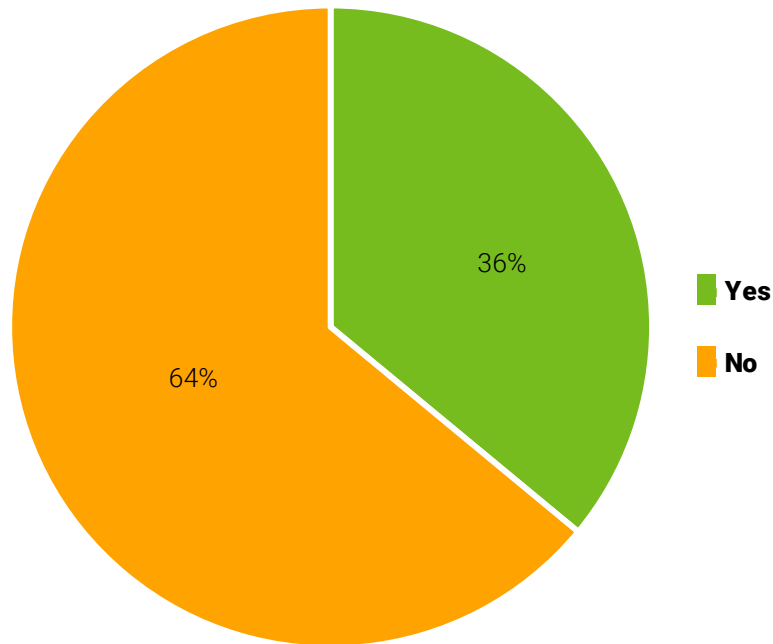
Bright Outlook

Jakob Dalhoff, CEO of MatchOffice, says:

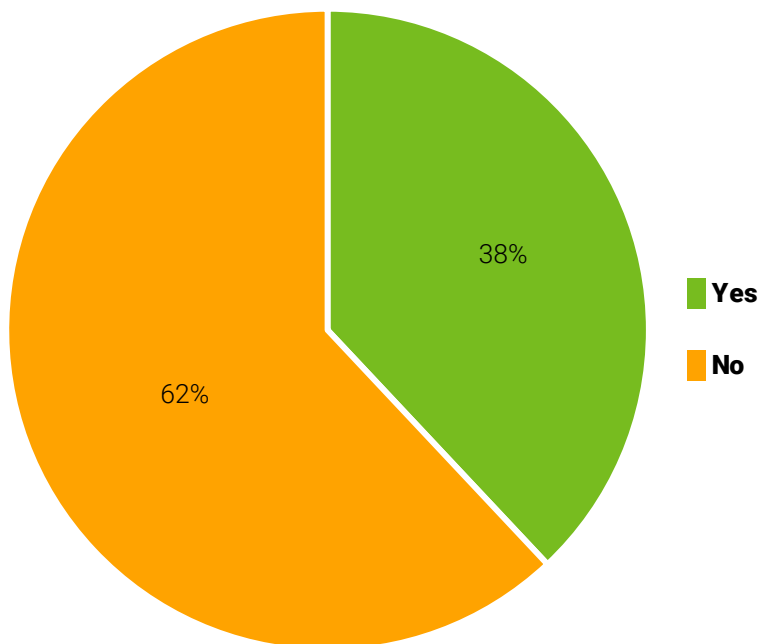
“ **The industry of flexible workspaces is booming worldwide. Looking at this year's results, we foresee its further growth. They are so popular because they are universal and can satisfy almost all business needs. Flexible workspaces allow communication between colleagues irrespective of their rank, which is part of the new corporate culture.** ”

1 : Have you ever used a serviced office?

2016



2017

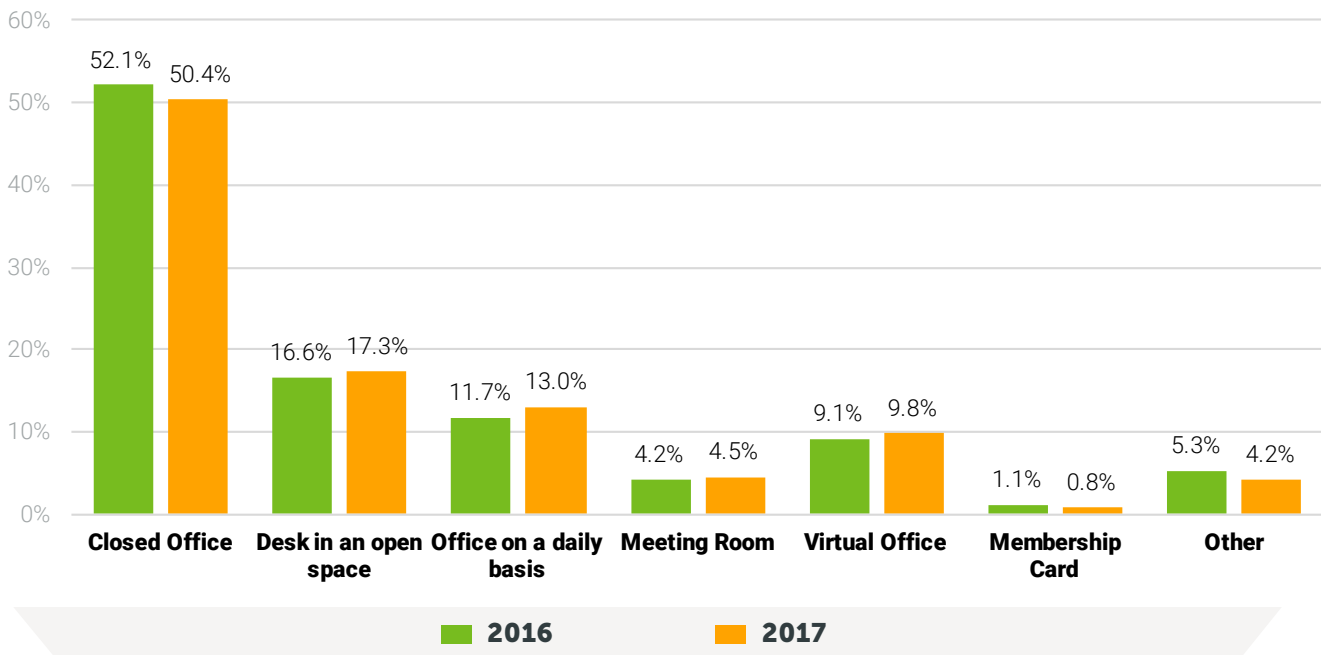


As predicted in 2016, the industry has achieved impressive growth this year. In 2017, 64 % of those surveyed are first-time clients, and almost 40 % have already discovered the many benefits of flexible workspaces.

With the popularity and growing market, more providers are entering the competition and offering inspirational workspaces to clients. By providing access to hospitality and community services such as gym, parking and networking events to name a few, they increasingly resemble hotels. Getting access to functional workspaces and meaningful connections seems to be what many companies are looking for today.

2 : What sort of contract do you have?

2016 / 2017



Like in the two previous years, over half of all respondents have signed a closed office agreement. However, we can see a slight increase in clients preferring shared space and desks on a daily basis. Despite concerns about noise, many of them choose open space. There are no cubicles and employees can move around freely and talk to their coworkers or other entrepreneurs in common facilities.

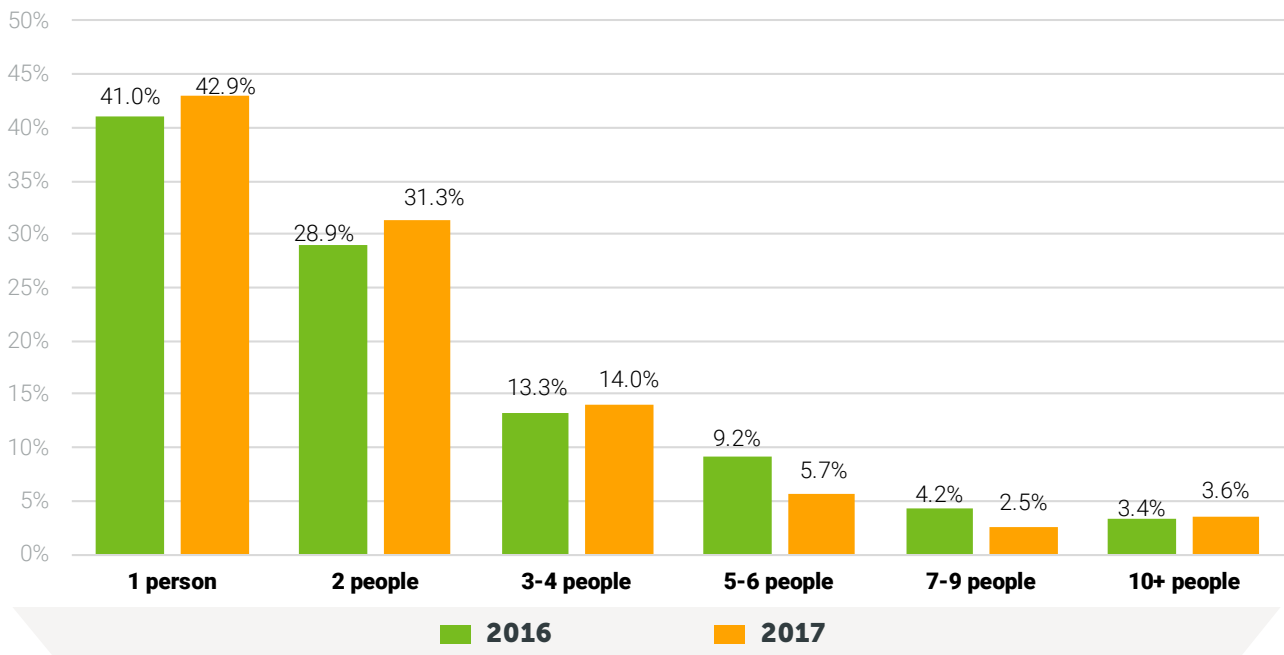
Jakob Dalhoff, CEO of MatchOffice, says:

“ The developing trend of coworking suggests that people want to interact at work, share their experience, and ask for advice. Often there’s a great mix of freelancers, start-ups, scale-ups and corporates that allows you to find the like-minded and the not so like-minded. ”



3 : How many people from your firm are using your serviced office?

2016 / 2017



For the third year in a row, we can see an upward trend in the number of bigger clients (10+ people) relocating to flexible workspaces. As a cost-saving measure, many companies nowadays adopt a flexible staffing strategy. They have core employees and as the workload increases, they hire temporary or part-time personnel to handle ad hoc tasks. Flexible workspaces are also the choice for the overwhelming majority of teams with 1-2 people (74.2 %).

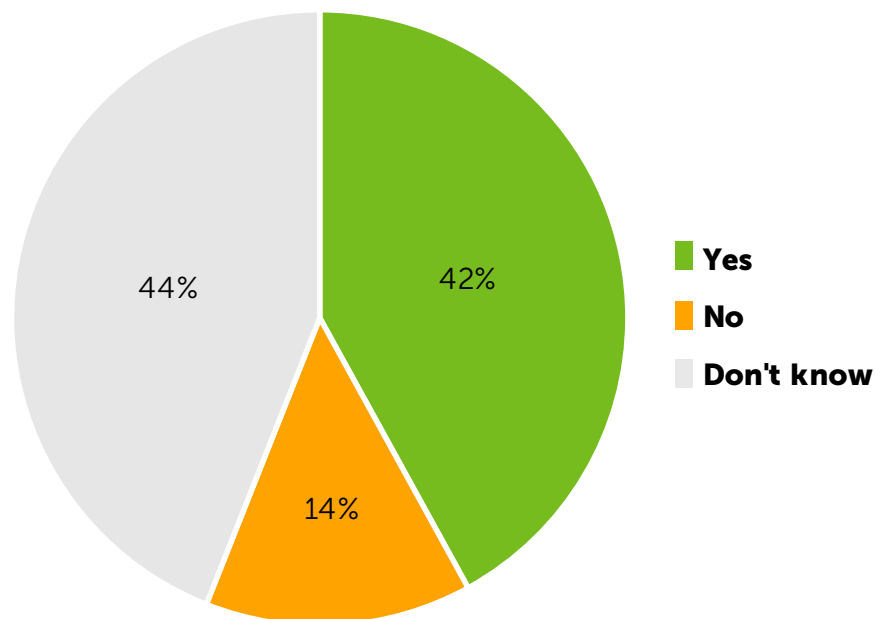
“Freelancers and start-ups often choose flexible workspaces to stay competitive and to afford many facilities they would not be able to pay for on their own. However, it is also a perfect solution for big companies with flexible headcount,

says Martin Roerholt, Global Relationship Manager at MatchOffice.

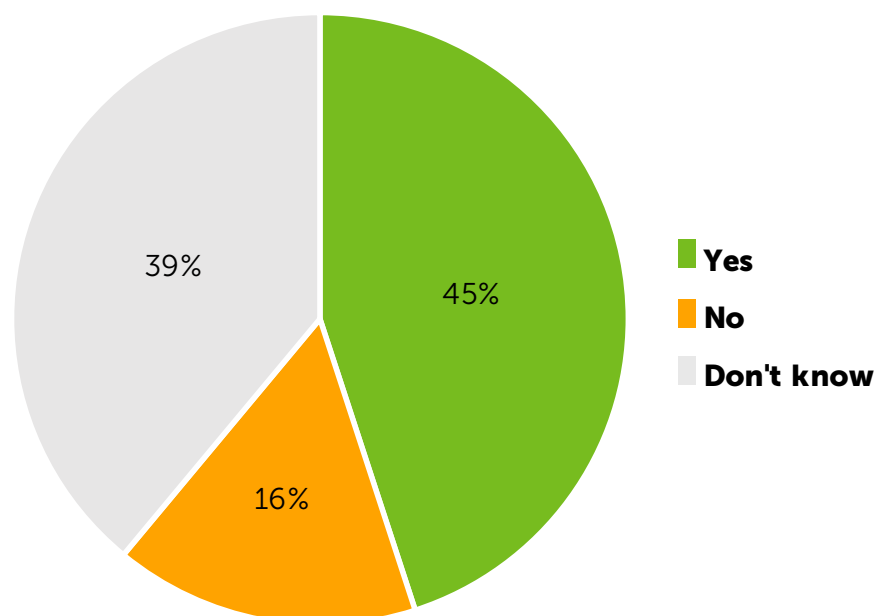


4 : Do you plan to renew your contract?

2016



2017

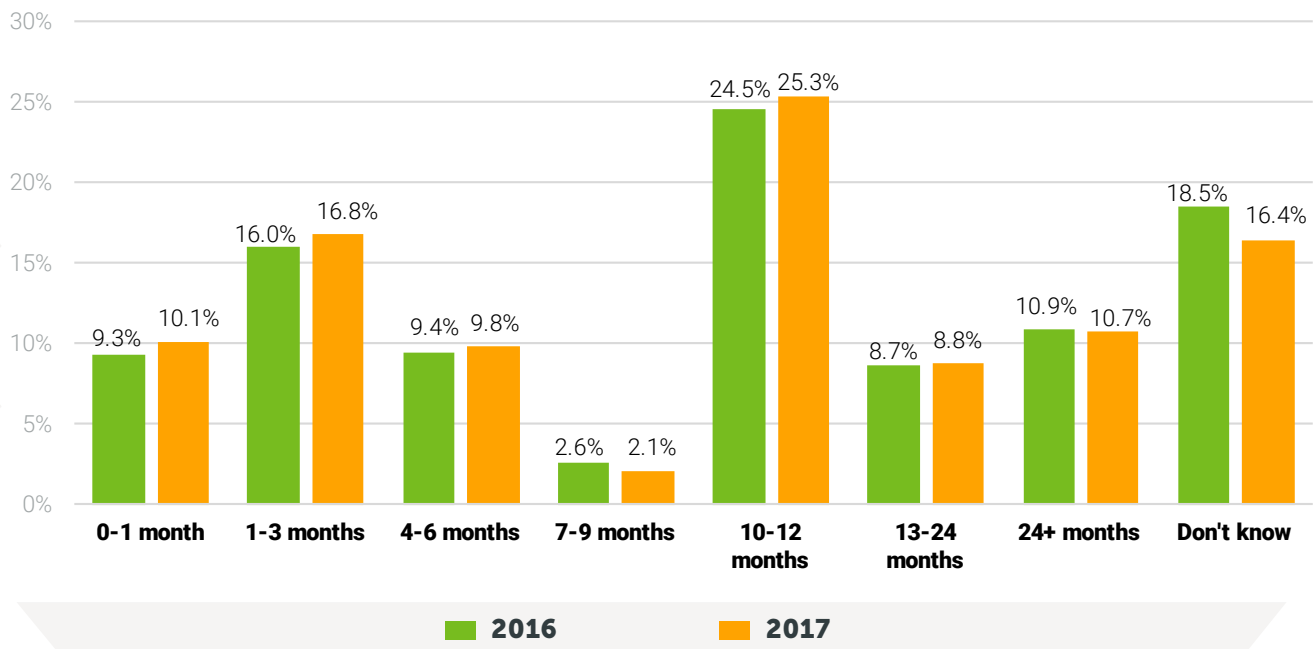


The 2017 graph suggests a healthy industry – almost half of clients plan to renew their contract. 39 %, however, have not decided yet, which means providers still have every chance to retain this client base. One reason to stay might be the provider playing a trusting role by supporting the client on their journey towards success. Another reason is the community spirit. Providers connect fellow interests by socially engineering people, companies and industries.

In comparison with 2016, the number of clients who decided not to renew is 2 percentage points up this year. It might be explained by many factors, for instance, if a flexible workspace is fully occupied, and companies cannot expand and have to leave the premises.

5 : What length of contract did you sign?

2016 / 2017



We are delighted to see that about one-third of clients have chosen to sign a long-term contract (10-24 months). Furthermore, over 10 % of those surveyed have decided on a tenancy longer than two years. It is not surprising as many clients might negotiate a better deal if they rent business premises for a longer period. 36.7 % of respondents opt for short-term leases (1-6 months). The number of very short contracts (0-3 months) has been slowly increasing since 2015.

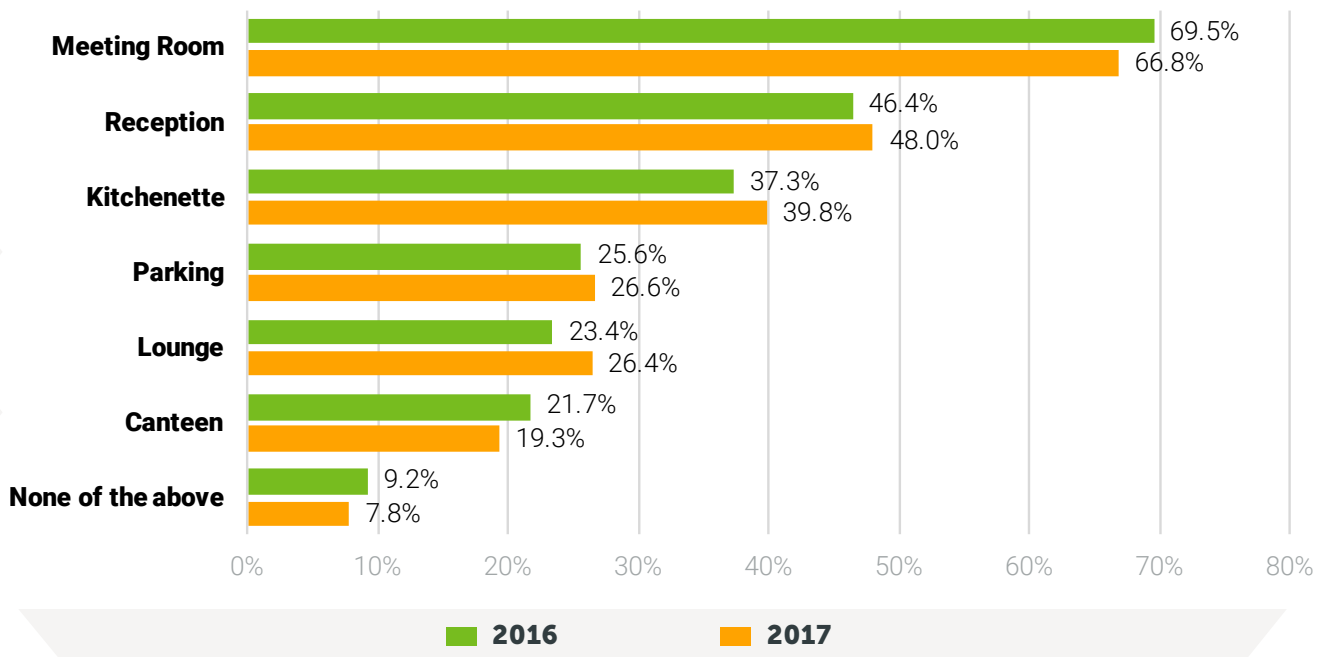
Jakob Dalhoff explains:

“ These are quite wonderful statistics. We have almost equal proportions of forward-thinking companies which have already discovered the merits of flexible workspaces, and entrepreneurs who greatly benefit from the possibility to adjust workspace to an unstable workload and to stay agile.



6 : Which of your office's facilities do you use?

2016 / 2017



Against 2016, the number of clients who use a reception has grown by 1.6 percentage points. Companies understand that the first impression their visitors get really matters and choose flexible workspaces with beautifully designed lobbies and friendly receptionists.

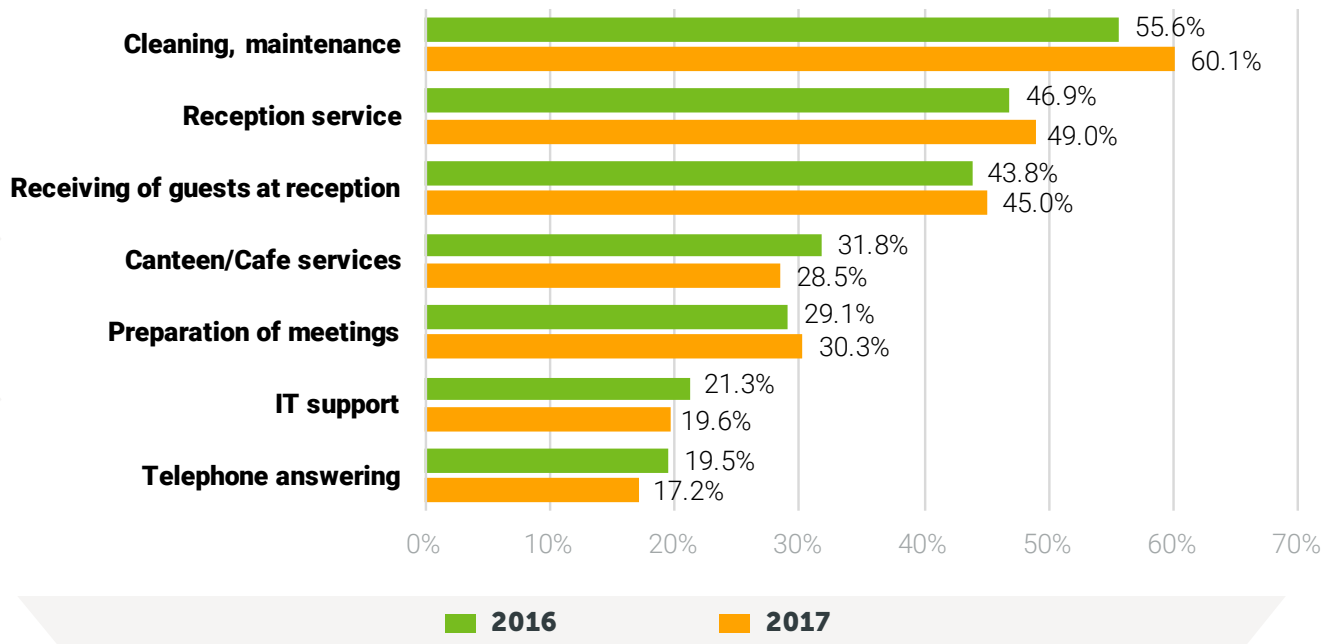
In addition, the use of meeting rooms has slightly decreased, although they are still in high demand. At the same time, a noticeable shift towards lounges and kitchenettes can be observed. The tendency for multi-tasking fuels the popularity of multi-purpose spaces.

“ Spontaneous gatherings help build community and relations between clients. We heard about providers intentionally installing slow brew coffee makers because a lot of people have coffee in common, says Martin Roerholt.



7 : Which services are the most important to you?

2016 / 2017



The 2017 figures suggest that a mess may hurt the company image. There is a 4.5 percentage points increase in clients for whom cleaning and maintenance have the biggest value.

Slightly under half of the clients require a reception to welcome guests, which resonates with the previous graph. Interestingly, telephone answering is diminishing in importance for the third year in a row. For one thing, we see the rise of chatbots and other channels of interaction, and for another, telephone systems are costly for the providers, and they will adapt to the reducing demand.

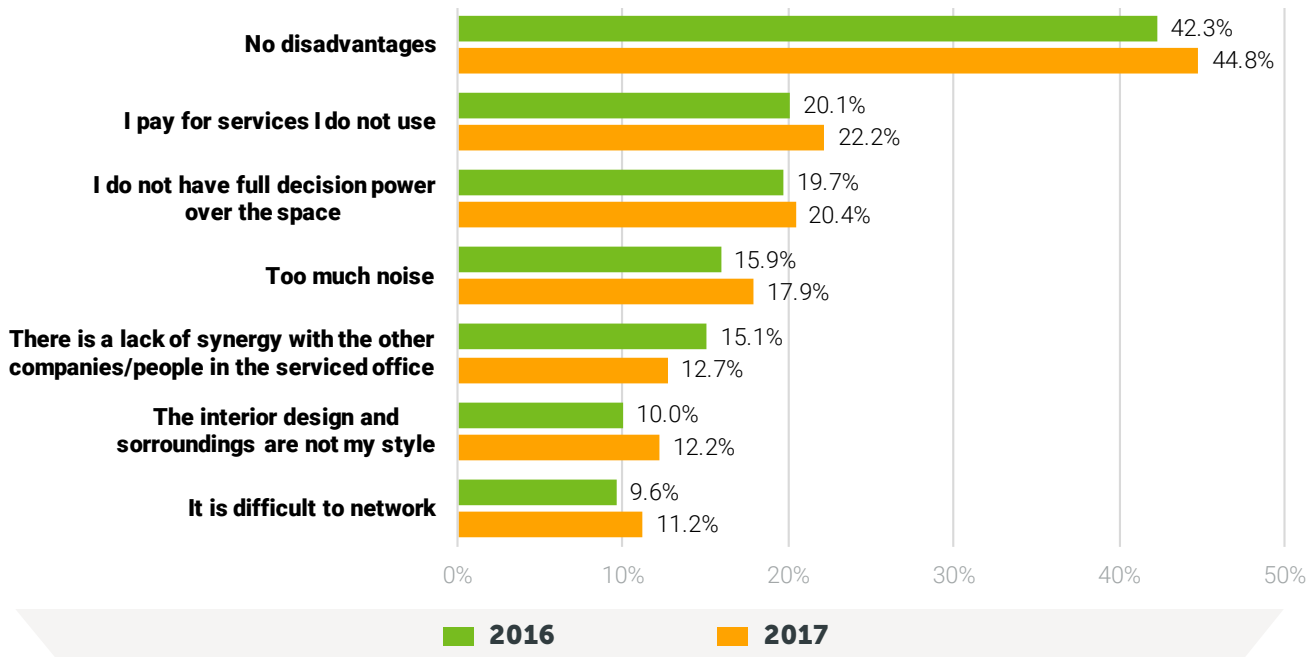
Jakob Dalhoff says:

“ This data look very natural, companies want to work in comfortable conditions, leave their guests with a favorable impression, communicate directly about key matters and automate the mundane. ”



8 : What are the disadvantages of serviced offices?

2016 / 2017



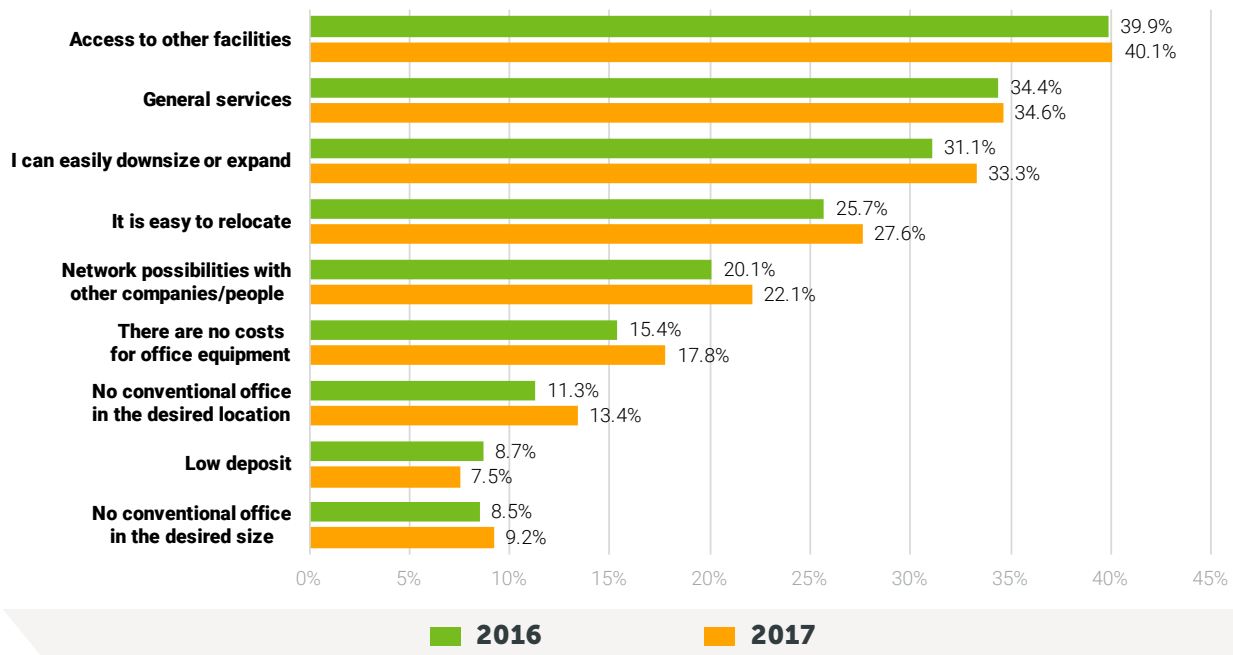
This year, 44.8 % of clients believe flexible workspaces have no disadvantages, a 2.5 percentage points increase against 2016. However, more respondents (slightly over 20 %) are not happy with having to pay for the services included in the price but not used by them.

“ There is a certain proportion of clients wanting to see improvements in the office design and networking, which create a warm atmosphere. We can see a new wave of flexible workspaces which even use pieces of art and other exquisite décor elements in their interiors to attract new clients and make them feel exclusive. Combined with the urge to work in a start-up environment, this makes it very attractive to corporates, says Jakob Dalhoff.



9 : What made you choose a serviced office over a traditional one?

2016 / 2017



The data in this graph confirm the conclusions we reached on the previous page. Against 2016, the situation has not changed drastically. Most clients still choose flexible workspaces because clients feel they outperform conventional in terms of price, easy relocation, extra costs, facilities and services, etc. Over one-third of all clients (2.2 percentage points more than last year) appreciate flexibility as they can adjust their headcount to the changing needs.

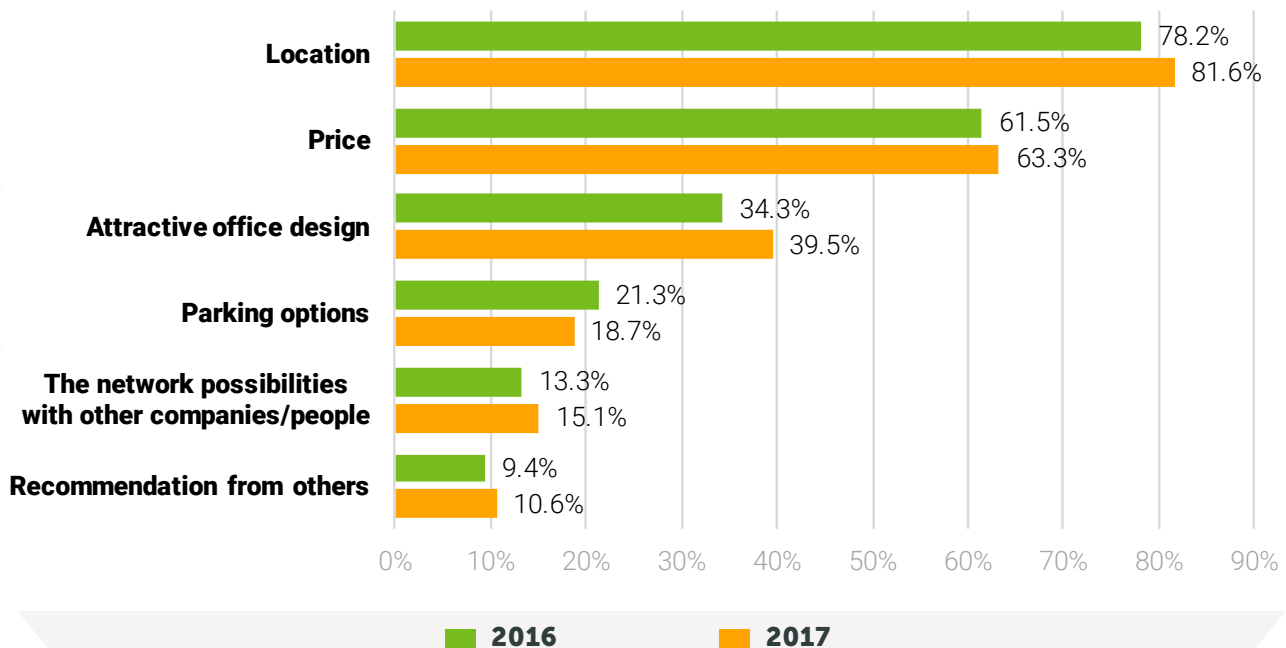
Martin Roerholt, Global Relationship Manager at MatchOffice, says:

“With flexible workspaces, it is a plug-and-play solution as everything is ready, and moving out is just as easy as the notice period is usually short. Many providers have their locations widespread, so you can get a uniform high standard and work from anywhere you like.”



10 : Why did you choose the serviced office you currently use?

2016 / 2017



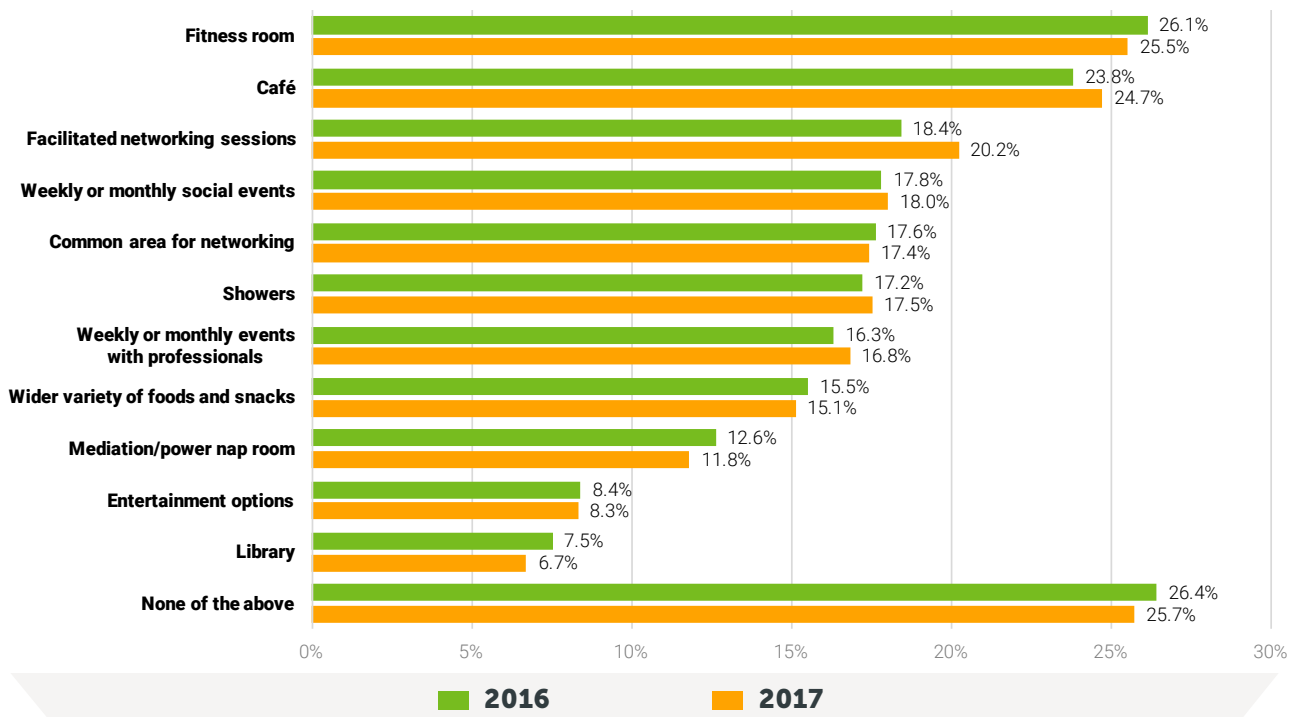
Unsurprisingly, almost 82 % of the participants say location influenced their choice. It saves valuable time otherwise spent on commuting and improves company image when their office is in a landmark building with a park nearby or stunning views. Seeking prestige might explain a 5.2 percentage points growth in the number of those motivated by attractive office interiors. However, it is of equal importance for employees, inspirational eye candy designs boost their productivity.

For the third consecutive year, price remains the second most decisive factor. The most noticeable change is in the respondents appreciating networking possibilities; it has doubled compared to **2015**. Similarly, this year every tenth client relies on recommendations; it is five times more than in 2015.



11 : What would increase the value of your serviced office?

2016 / 2017



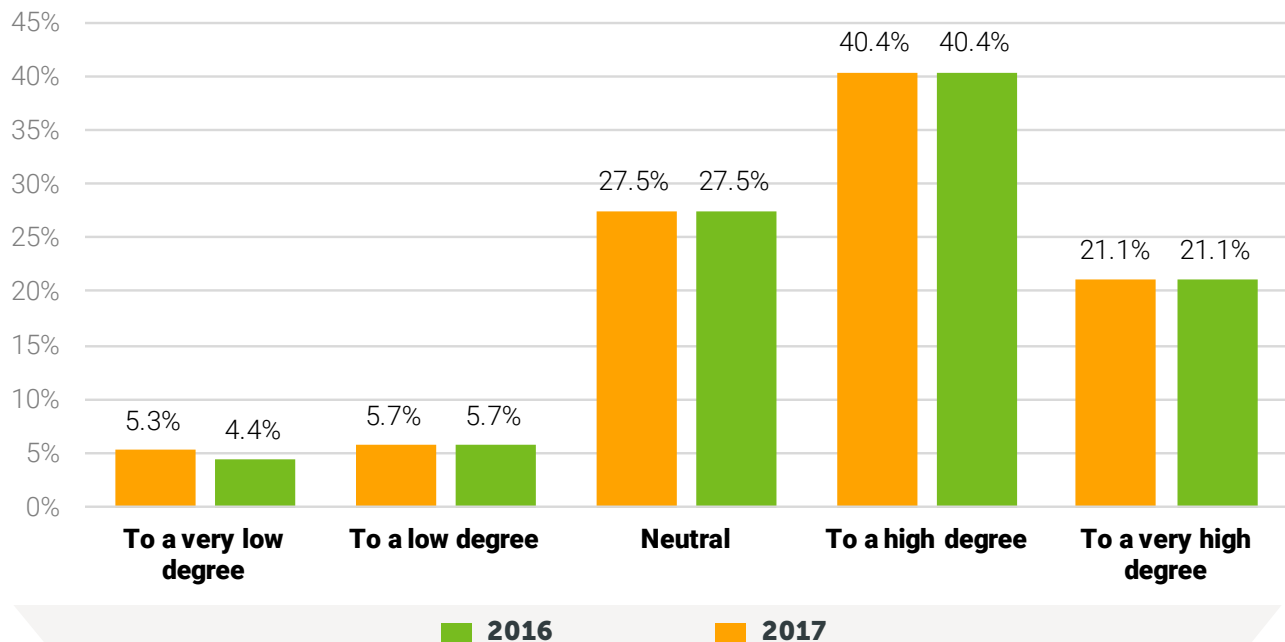
We can see almost the same sentiments as last year with an even bigger shift towards networking as 55 % of clients believe it will make their flexible workspaces even more attractive. Interestingly, they expect providers not only to offer areas for informal communication but also help people connect with each other, organize dedicated events and even invite experts from different areas to share their experience.

Like in 2016, the same proportions of clients (around a quarter) mentioned they would benefit from a fitness room and a café in the building. As the speed of life is increasing, people want to have everything within a few minutes reach. Encouragingly, 25.7 % are content with what they have now.



12 : How well does your serviced office meet your expectations?

2016 / 2017



This year's figures look as inspiring as in 2016. 65.3 % of all clients report flexible workspaces have lived up to their expectations to a high or a very high level and there is a positive shift in neutrals. The number of clients with low satisfaction has remained unchanged which means there is still room for improvement.

Martin Roerholt comments:

“ This is the second time we have asked about expectations, which now makes it possible to compare. The flexible office industry is developing rapidly with more players entering the market, which naturally raises the bar. There will be more cool features and services at the same price. Therefore, we expect the level of client satisfaction to be even higher in the future. ”



About MatchOffice

MatchOffice is one of Europe's leading commercial real estate brokers, cooperating with flexible workspaces since 2004. Almost 6,000 flexible workspaces are represented on our new global website, and the number is increasing rapidly. Our strategies of visibility, easy user-engagement and automatization are among the cornerstones of our leadership.

We strive to stay one step ahead and deliver the best service to our clients and partners. Our talented international team makes a remarkable effort to introduce new, cool functions and make our platform as user-friendly as possible. This approach is valued by thousands of businesses which choose us for commercial space lease, sale or purchase. MatchOffice is a forward-thinking company that looks to the future with confidence.

Now you can find
coworking + meeting rooms at
www.matchoffice.com

**Explore MatchOffice's
other surveys**

Client Survey 2016
Industry Report 2017
Industry Report 2016



**Abelgade 4,
DK-2100 Copenhagen
+45 39 45 85 50
post@matchoffice.com**

MatchOffice is present in more than 100 countries and has local sites in a number of countries including:

**Austria, Belgium, Denmark, Finland,
France, Germany, Hong Kong, Italy, India,
Luxembourg, The Netherlands, Norway, Poland,
Singapore, Spain, Sweden, and Switzerland.**