

CLIENT SURVEY

2019

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

Over a 1,000 clients from 23 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.



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Introduction

For the fifth consecutive year, we are proud to present the MatchOffice Client Survey. Traditionally, the questionnaire was conducted among clients of European flexible workspaces to find out whether or not they are satisfied with the workspace they currently occupy, what they value the most, and determine the latest tendencies of the market from the client's perspective.

In 2019, 1055 participants expressed their opinion on how flexible workspace providers can optimize customer experience. With the general shifts in corporate culture, shared workspaces are holding the lead position in the market gaining over 60% of new clients yearly. While most respondents are planning to continue their cooperation with the chosen provider, there is still room for improvement in order to win over those who haven't made up their minds yet.

With competition on the market being higher than ever, serviced office providers focus increasingly on the needs and well-being of the tenants. Thus, even large corporations tend to move to coworking spaces. In our [Industry Survey](#), published in June this year, we give more detailed information on the trends and the course of development of the flexible workspace market.

We hope that our survey results will be a great asset for you to develop your business exceeding the clients' expectations.



Jakob Dalhoff
CEO, MatchOffice
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Key Results

Our findings.

Customer centricity

In 2019, flexible workspaces focus on meeting all possible requirements of the modern client. The evolving workforce of today is used to an abundance of choices for coworking spaces of all shapes and sizes. To succeed in this highly competitive and dynamic market, office providers strive to present high-tech workspaces with activity-based design to minimise customer effort and enhance tenant experience. To satisfy not only business, but also personal needs on the client, flex-spaces are becoming pet-friendly.

Flex-space as long-term solution

With the flexible structure of today's work, and self-employment being an increasing trend, coworkings are mostly associated with freelancers and project-based teams. However, there has been a shift towards corporate adoption of coworking. Big companies turn to utilizing flexible offices as a long-term solution and viewing 'space as a service'.

Corporations benefit greatly from the economy and agile working that flexibility can provide.

Flexible workspaces go global

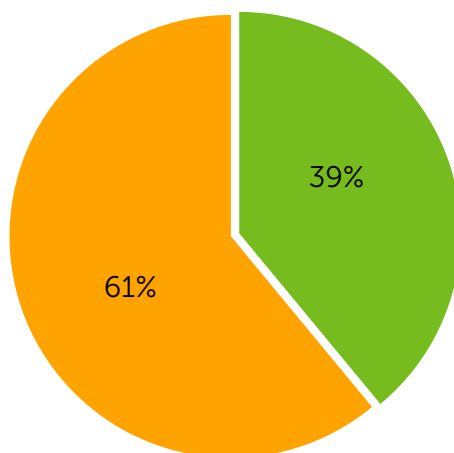
Jakob Dalhoff, CEO of MatchOffice, says:

“Coworking space market gained massive popularity across the globe providing international opportunities for networking. Getting a membership allows clients access to all locations of the provider worldwide. This way companies can grow and establish a workspace system abroad. We can observe overseas providers expanding in big European cities, and Asian providers entering Europe and the US.”



1 : Have you ever used a serviced office?

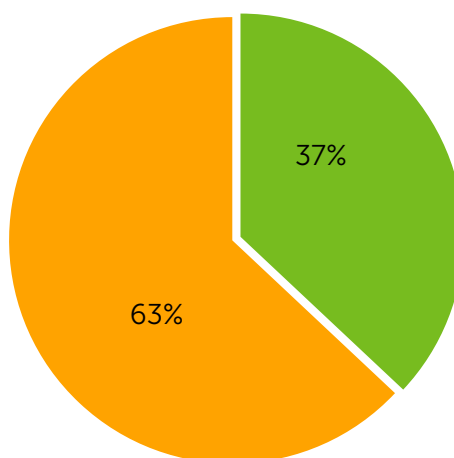
2018



■ Yes

■ No

2019



■ Yes

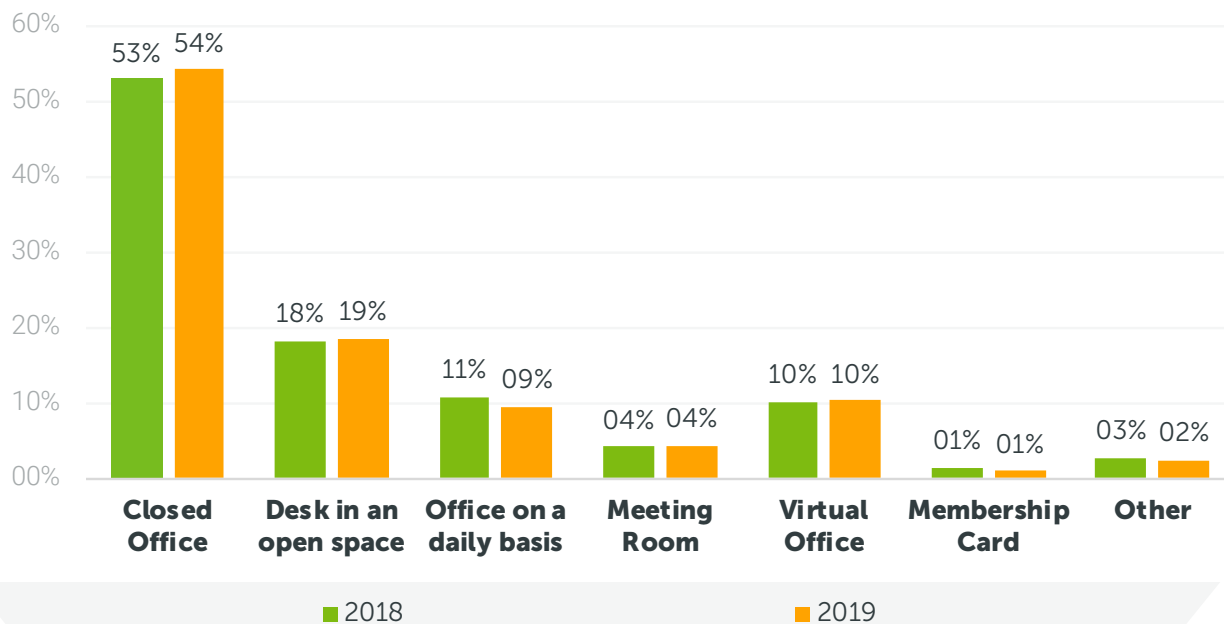
■ No

In 2019, the popularity of flexible office space continues to grow, gaining 63% of new tenants. The market is thriving as individual freelancers and small teams, along with large corporations explore the excellent opportunities provided by this type of workspace.

The ratio of returning to first-time clients remains quite stable year-on-year. This is a great sign indicating that serviced office providers manage to remain innovative, maintain a high level of client satisfaction, and retain their existing tenants.

2 : What sort of contract do you have?

2018 / 2019



Just like in the years before, the majority of respondents give preference to the privacy of a closed office. The number of those using hot desks rose by 5%-points. The amount of respondents renting an office on a daily basis decreased by a whole 1.3%-points, while the graphs representing those using other services remain almost unchanged.

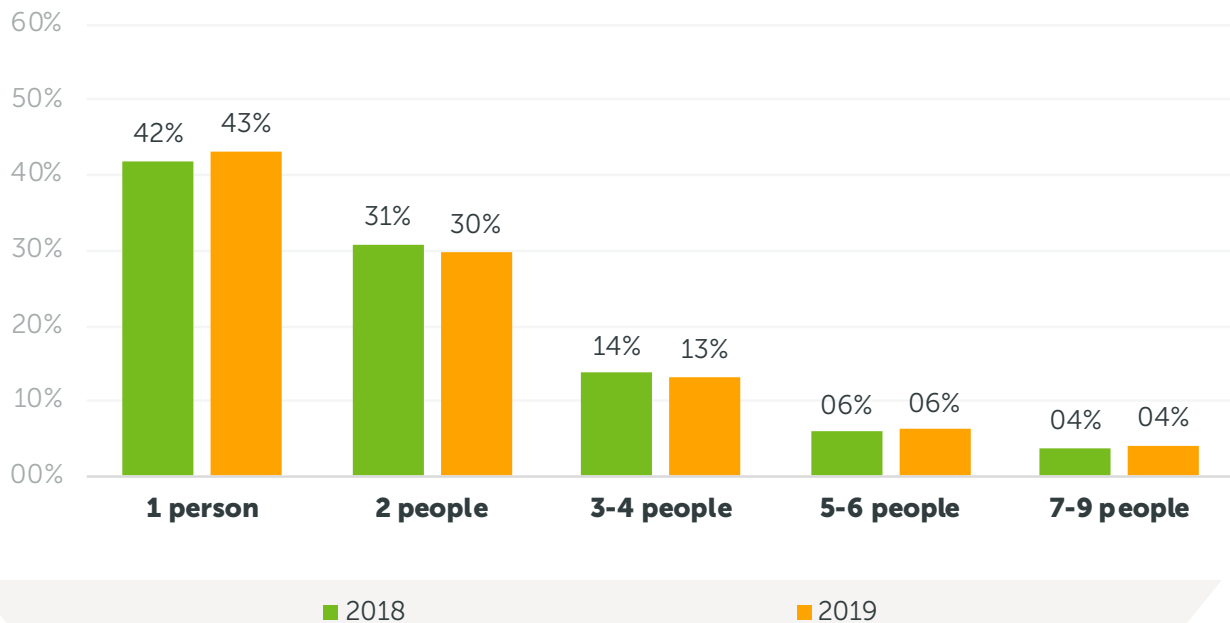
Jakob Dalhoff, CEO of MatchOffice, says:

“ ***This year’s survey shows stability of client choice when it comes to the type of service they go for. Considering the growing demand, providers get a precise vector of development for the upcoming years.*** ”



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

2018 / 2019



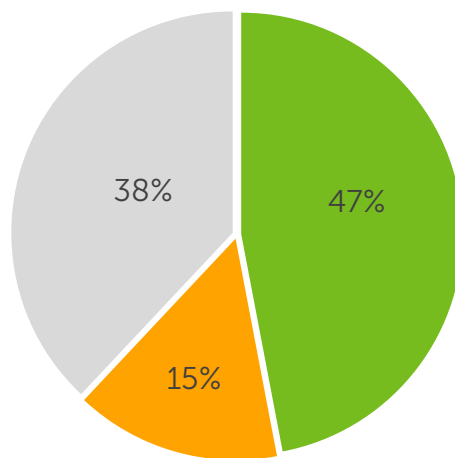
Despite increasing popularity among corporate occupiers, individual entrepreneurs still comprise the largest share of serviced office users. The percentage of small teams renting flexible workspaces is stable compared to last year's results.

“Flexible offices make things easy when it comes to workspace arrangement, as all the facilities are taken care of. It is especially relevant if you are a freelancer or small team. This explains the high popularity this workspace option among individual employees,” says Jakob Dalhoff, CEO at MatchOffice.



4 : Do you plan to renew your contract?

2018

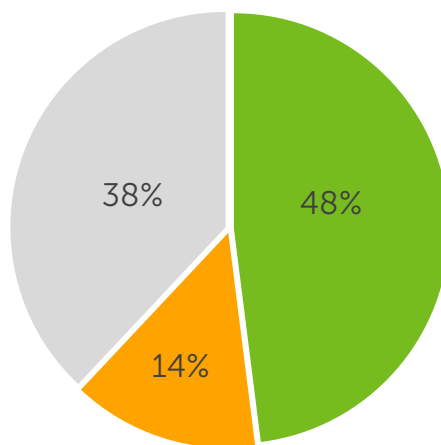


■ Yes

■ No

■ Don't know

2019



■ Yes

■ No

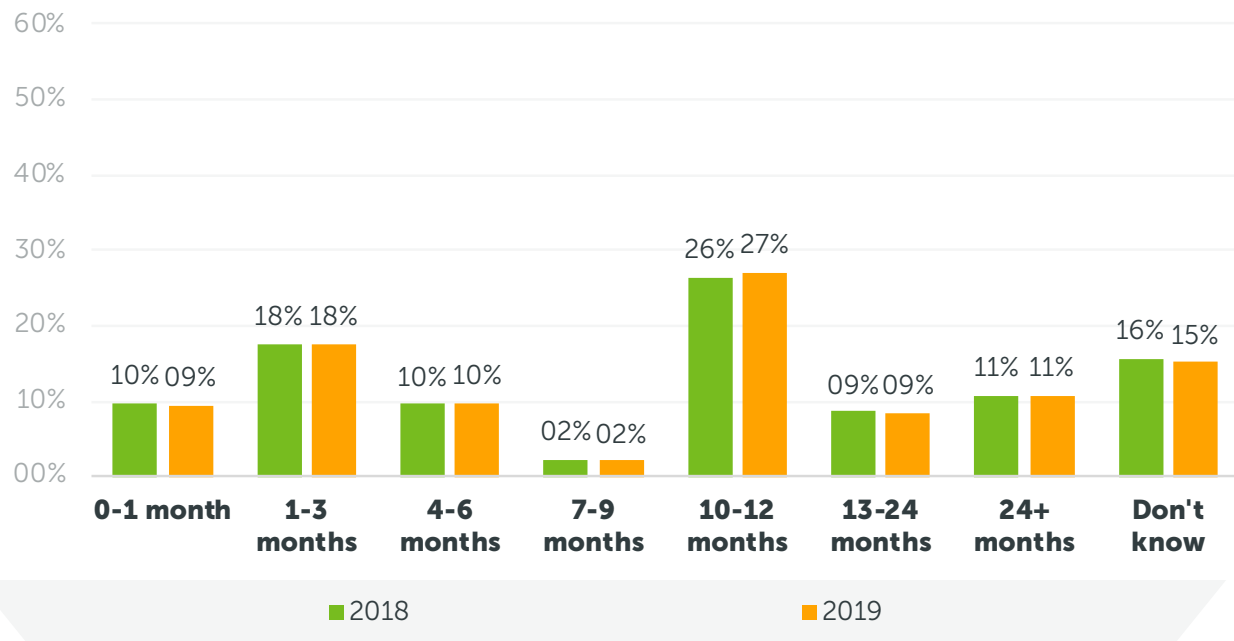
■ Don't know

This year there has been a slight increase in the share of those planning to renew their contracts with the serviced office provider over those who don't. Business is booming and it looks like so far providers are doing a great job when it comes to client retention.

Big companies are following the flexible working trend. Unlike individual specialists, corporations are looking for a long-term solution for their business. This is a great opportunity for office providers to conduct longer-term contracts or increase the percentage of contract renewal.

5 : What length of contract did you sign?

2018 / 2019

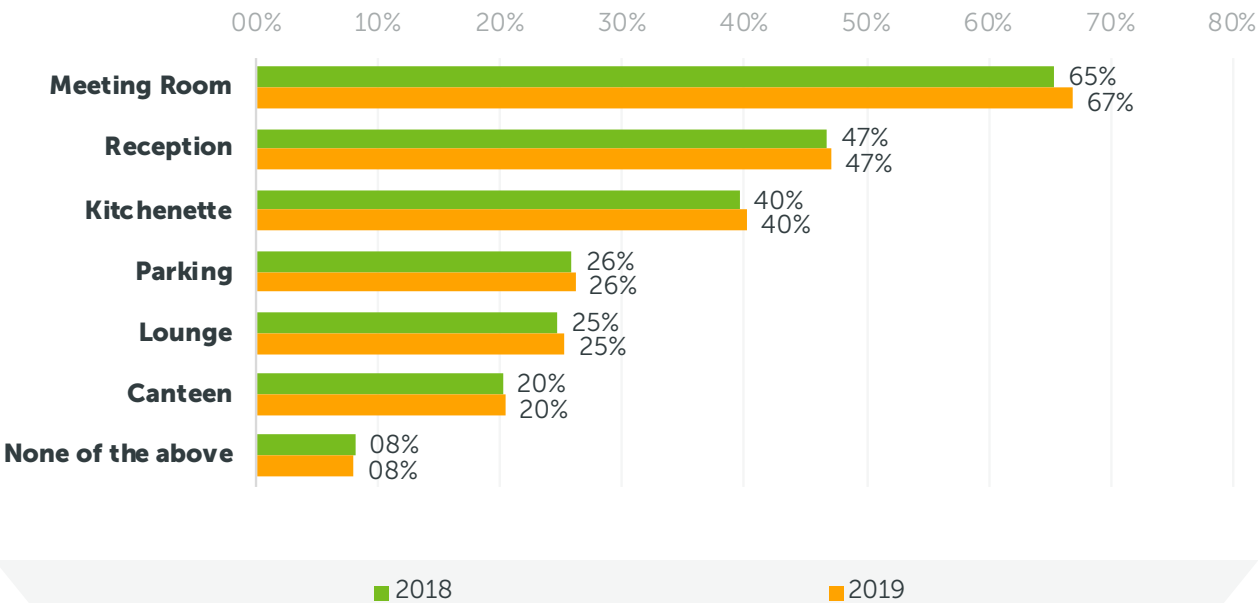


Just like in 2018, most respondents this year opted for 10-12 month contracts. The second most popular contract length is 1-3 months. Taking into account the stable year-on-year data, it looks like serviced office providers established a gold standard for contract lengths in the market.



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

2018 / 2019

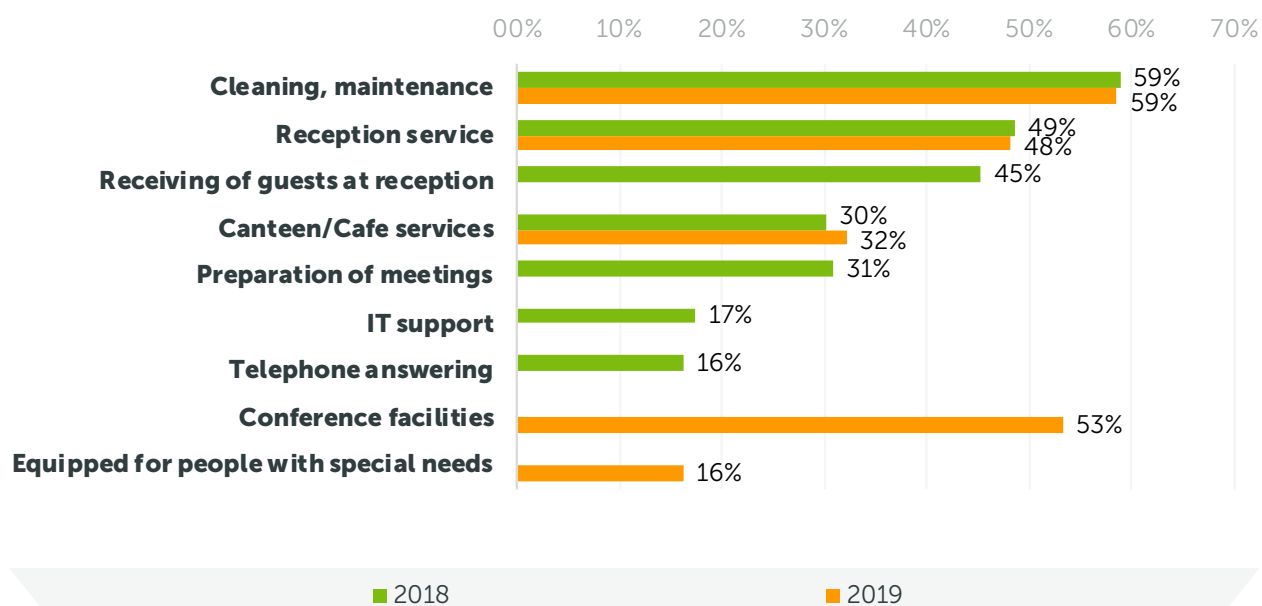


As usual, meeting rooms maintain the position of the most highly used serviced office facility. This year, the popularity of this facility rose by 1.5%-points. There has been just a slight increase in the number of those using other services presented in the inquiry.



7 : Which services are the most important to you?

2018 / 2019

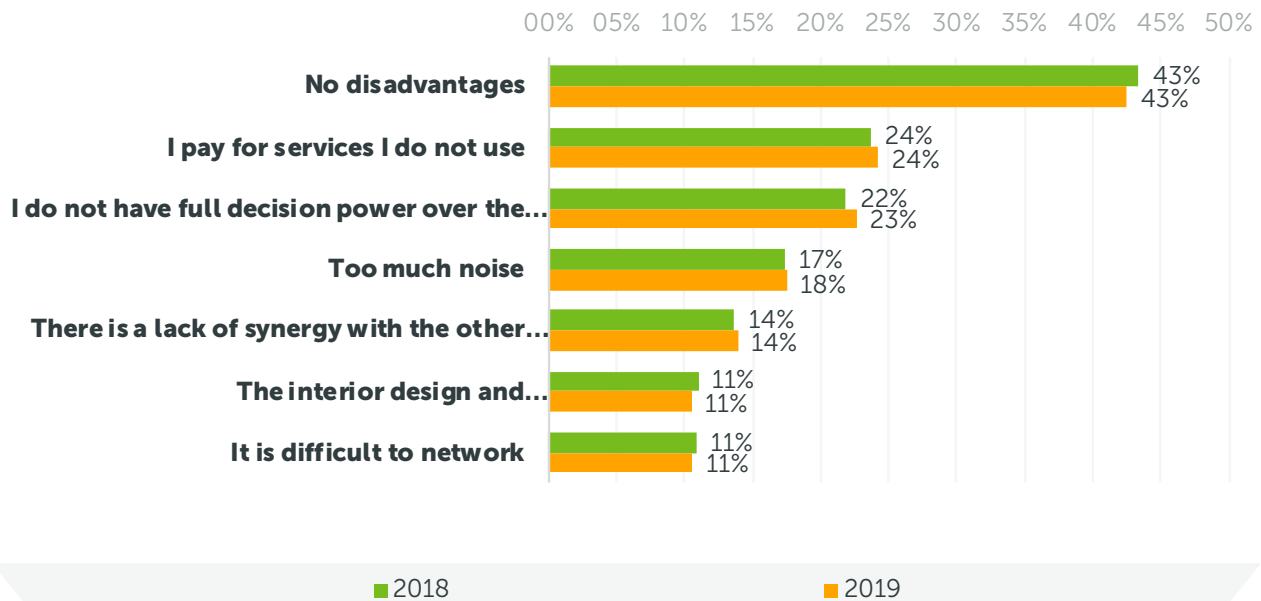


This year, we introduced two new services to our questionnaire: conference facilities and equipment for people with special needs. They got 53.2% and 16.2% of votes respectively. Cleaning and maintenance are still the most popular. 2%-points more employees turned to using cafe service.



8 : What are the disadvantages of serviced offices?

2018 / 2019



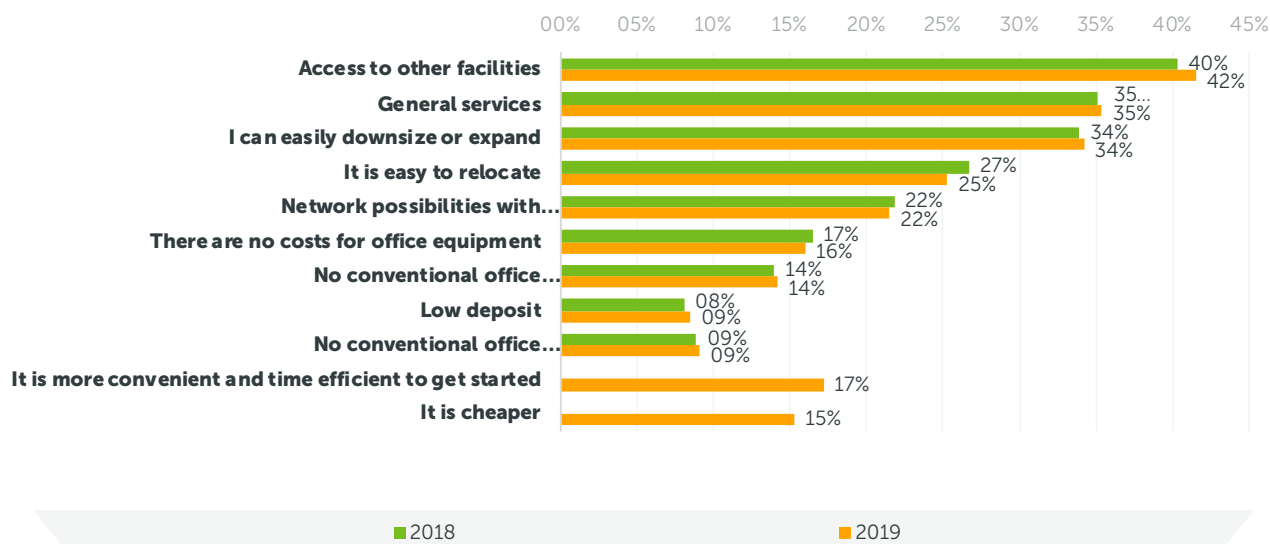
As usual, most respondents did not find any disadvantages in using a serviced office. Almost a quarter of all respondents believe they are paying for an array of services that they do not use and are neither able to make any changes or adjustments when it comes to design or workspace arrangement. Altogether, 10.5% of respondents dislike the interior design of their workspace.

Open-plan offices could be catalysts of noise which 17.5% of respondents consider a disadvantage. Although, coworking spaces were designed with networking opportunities in mind, 13.9% of our respondents feel the lack of synergy and 10.6% find it difficult to network.



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

2018 / 2019



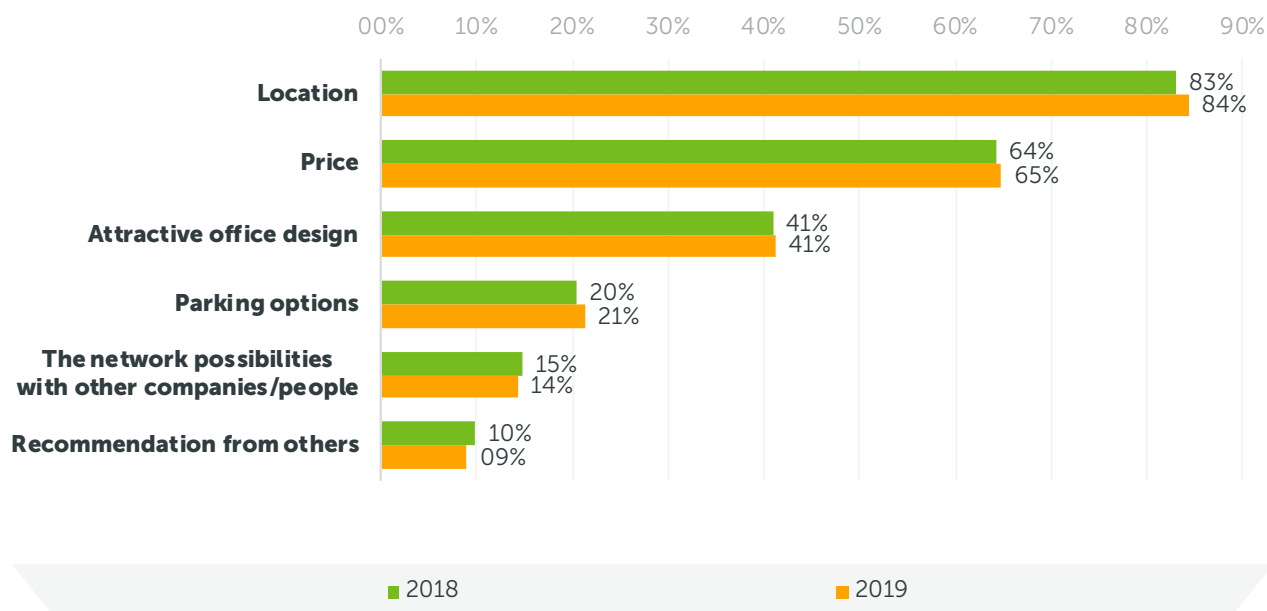
The main reason for clients to opt for a flexible office are the facilities provided. Not having to think about workspace arrangement and being able to move in instantly is a major hassle relief. Even though a number of users complain about paying for what they do not use, most of them stick to the standard bundle.

Flexible offices currently provide the most cost-efficient options on the market which keeps attracting new users year after year.



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

2018 / 2019

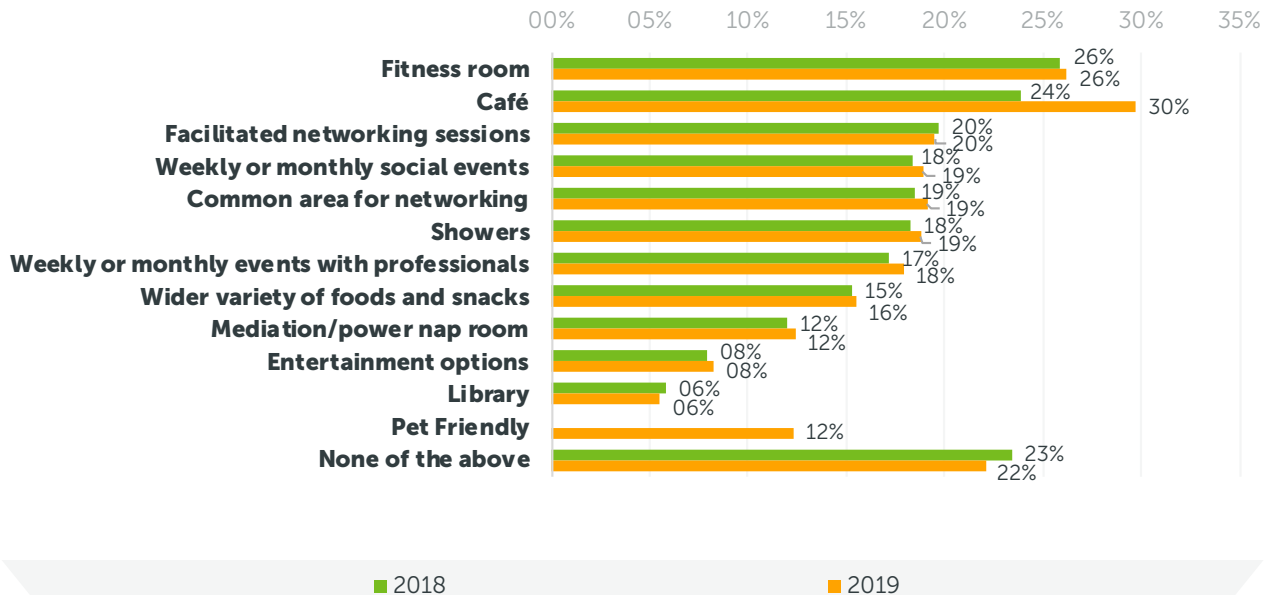


The main factor for a company to choose their workspace remains its location. 64.8% motivated their decision by pricing. A little over 41% appreciate attractive office design. 21.3% were looking for convenient parking facilities nearby. 14.3% of respondents were looking to channel with likeminded professionals. And finally, 9% followed the recommendation from others.



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

2018 / 2019



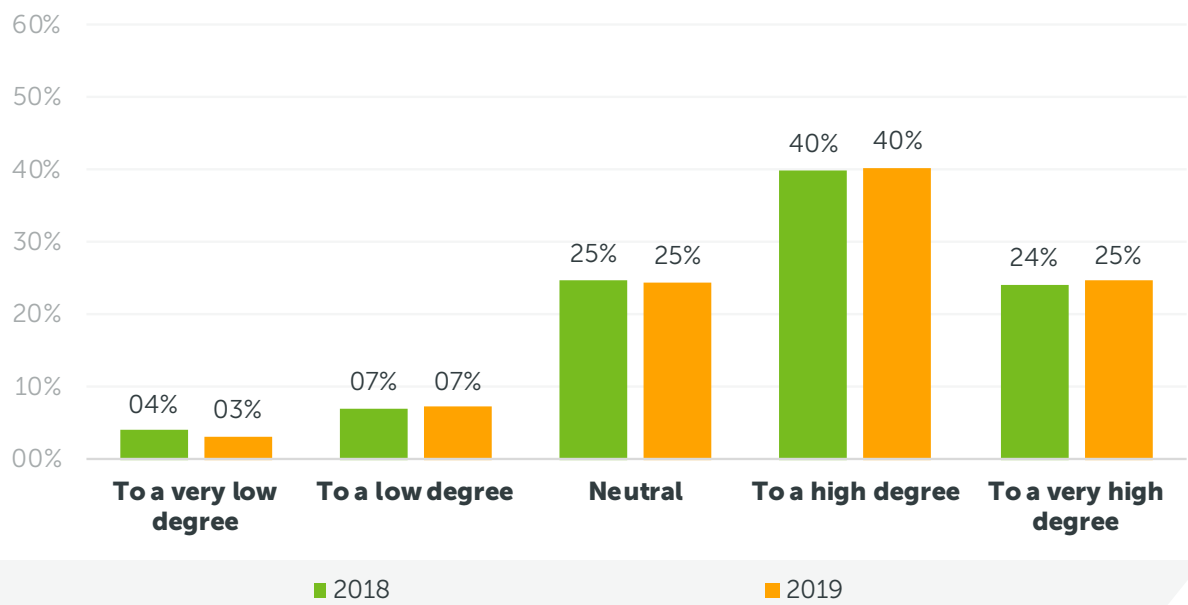
Following the latest tendencies in flexible office space development, we introduced a new category to our questionnaire – pet friendly workspaces. As can be seen from the graph, this facility was voted for by 12.3% of clients. The number of those, who could use a café nearby increased by a whole 5.8%-points.

Generally, the responses are similar to the ones from last year with a decrease of 1.3%-points in the number of those, who are content with the services provided.



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

2018 / 2019



Most respondents this year reported to be highly satisfied with their workspace. There has been a slight rise in the number of those satisfied to a very high degree – 0.6%-points, to be exact. At the same time, the number of respondents, whose expectations were met to a very low degree decreased by 0.8%.



About MatchOffice

MatchOffice is one of Europe's leading commercial real estate brokers, cooperating with flexible workspaces since 2004. Almost 7,000 flexible workspaces are represented on our 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.

**Explore MatchOffice's
other surveys**

[Client Survey 2018](#)

[Industry Survey 2019](#)

[Industry Survey 2018](#)



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

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

