

CLIENT SURVEY

2020

MatchOffice presents the Client Survey of 2020

Over 1000 clients from 23 countries took part in our survey. Read on to find out the clients' perspective on renting a serviced office under the conditions of a global pandemic.



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Introduction

Following a good tradition, we would like to present to your attention the MatchOffice Client Survey, conducted for the sixth consecutive year. We asked clients of European serviced offices how they feel about the workspace they currently occupy, what services they value the most, and found out the general tendencies in view of the global COVID-19 pandemic.

The never before seen shift to homeworking, that emerged in 2020, put operators in the position where they have to adjust to the new norms and regulations. Access to many services that were provided previously is now restricted. Workspaces are now introducing more private zones that allow social distancing and implementing strict sanitization. Businesses are trying to stay afloat and thus are looking for flexible and cost-effective solutions.

We are living in strange and unpredictable times and it is interesting to see, what the future holds for serviced offices. At the moment, many clients completely moved out or significantly downsized their office space. However, companies still need to make use of a business address, meeting rooms, call and mail handling. And this is where workspaces step in. Lastly, individual entrepreneurs and small companies will likely continue using the benefits of serviced offices.



Jakob Dalhoff
CEO, MatchOffice
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Key Results

Our findings.

Shorter, more flexible agreements

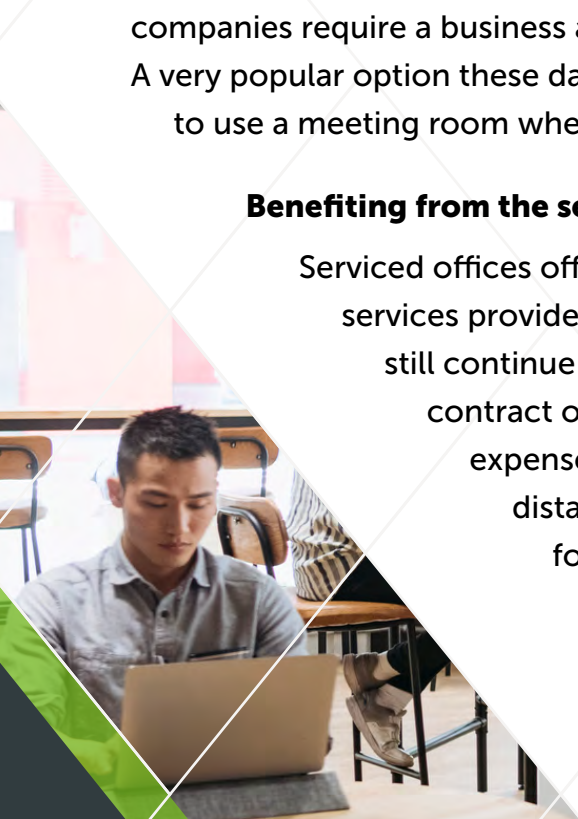
With the uncertainty brought about by 2020 and businesses being on the brink of survival, most of our respondents shifted from long-term memberships to more flexible options. An overwhelming 44% of our respondents haven't made up their minds as to whether to renew their contracts. There has been a significant decrease in memberships. Companies are trying to find the most optimal and cost-effective solution in these challenging time for the business.

Using a business address while at homeoffice

As tenants were moving out of their offices, there has been an increasing demand for virtual offices. To maintain a professional image, companies require a business address as well as phone and mail handling. A very popular option these days is renting a virtual office with the possibility to use a meeting room when required.

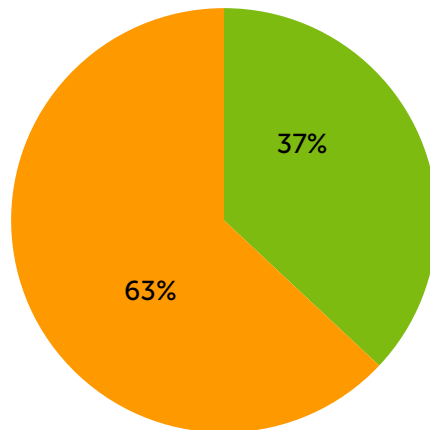
Benefiting from the services provided by flex-spaces

Serviced offices offer unparalleled benefits when it comes to an array of services provided. Therefore, many companies and individual entrepreneurs still continue using them. Operators are adjusting by offering shorter contract options, lowering or eliminating security deposits and utility expenses. By being able to provide all conditions for social distancing, serviced offices are quite likely to thrive in the foreseeable future.



1 : Have you ever used a serviced office? / Have you used a serviced office since the start of the COVID-19 pandemic?

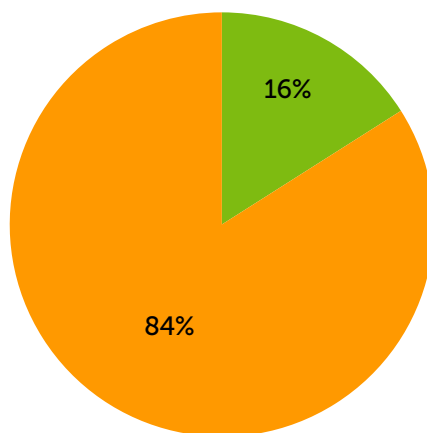
2019



■ Yes

■ No

2020



■ Yes

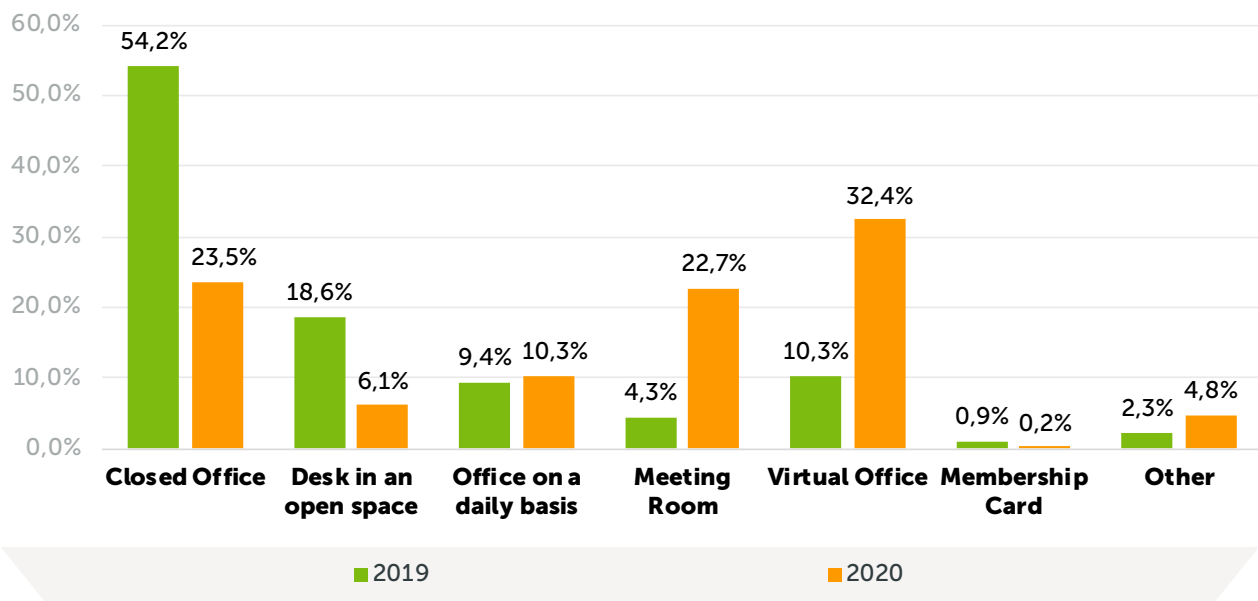
■ No

2020 brought about massive changes in the way people work. Due to the safety regulations, people had to move to home office leaving workspaces standing empty. According to our survey results, only 16% of respondents used their serviced office since the quarantine was introduced.

As businesses were reopening, serviced office operators were doing their best to adjust to the new norms. Thus, it is quite likely that workspaces should be able to revive and regain their popularity. After all, serviced offices can provide an array of services that make working much more pleasurable.

2 : What sort of contract do you have?

2019 / 2020



Unlike the previous years, in 2020, the most popular services among our clients were virtual office and meeting room. On a number of times, people like to use the virtual office with a possibility of booking a meeting room when necessary. The amount of respondents renting closed offices decreased by a whole 30.7%-points, those, renting desks in an open space – by 12.5%-points.

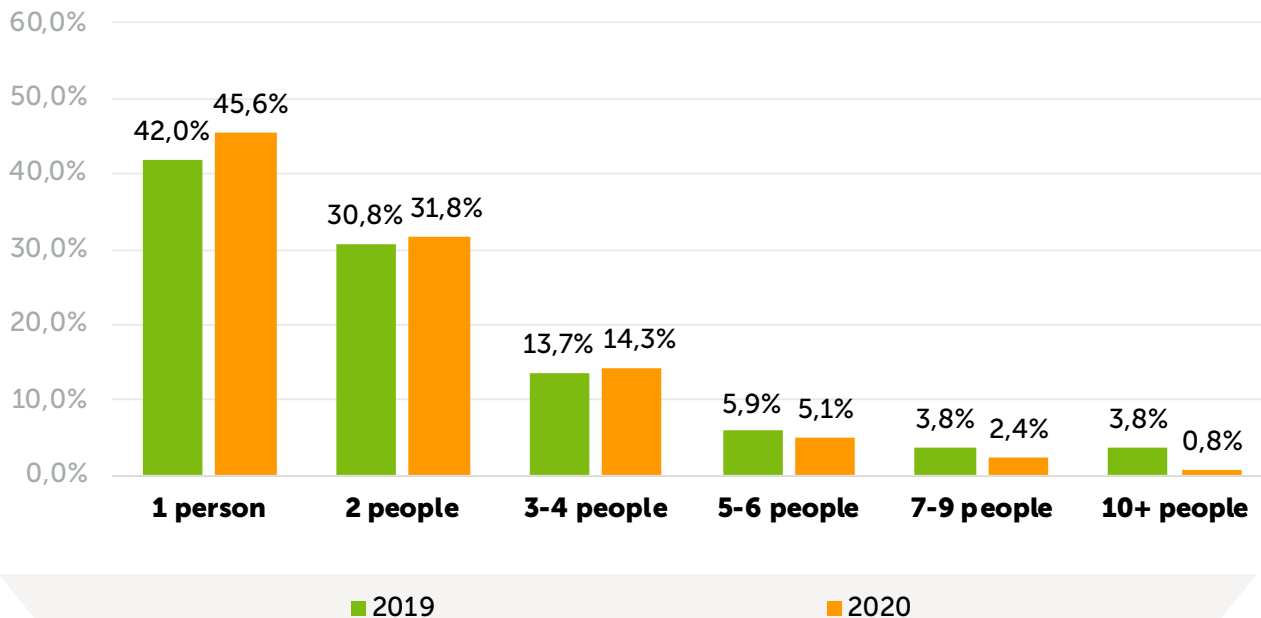
Jakob Dalhoff, CEO of MatchOffice, says:

“ **A virtual office gives your business a prominent address, you can use a meeting room when you need a brainstorming session and have your calls and mail handled. All of this allows you to look professional at an affordable price point.** ”

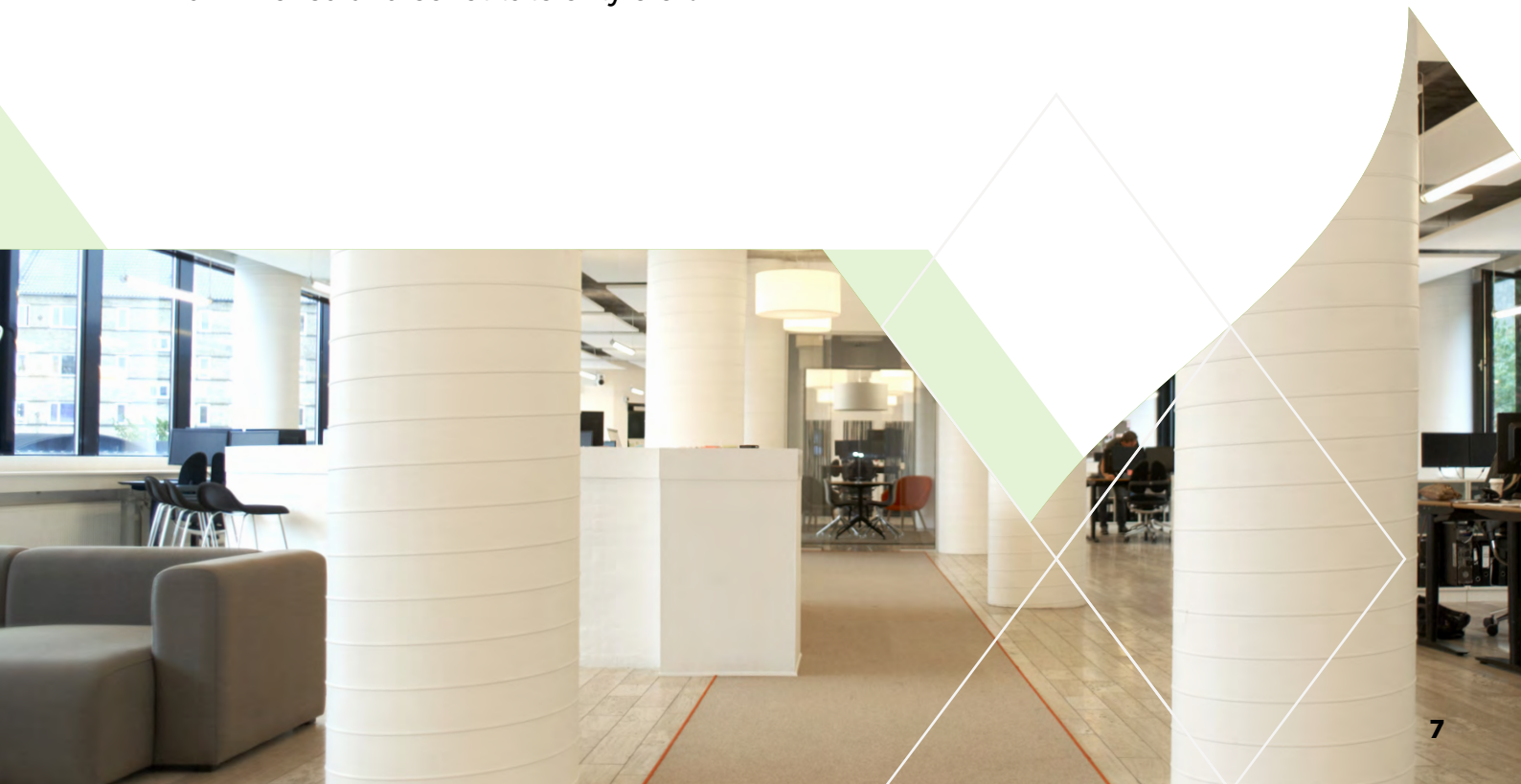


3 : How many people from your firm are using your serviced office? / How many people from your firm were using services office since the start of quantine?

2019 / 2020

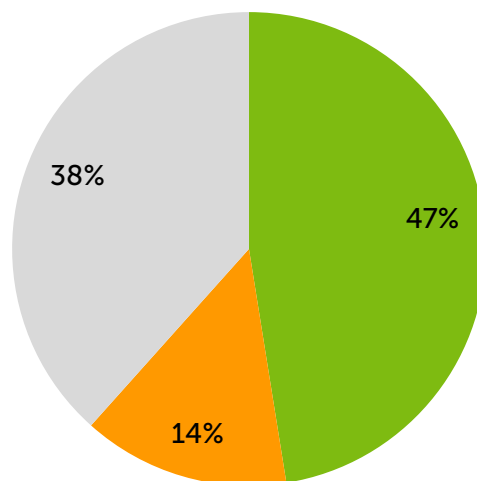


With the requirement for social distancing, we can see that in most cases only up to 3 people are using a serviced office at the same time. Just like last year, the majority is constituted by individual entrepreneurs. The amount of clients, renting a serviced office in groups of 3-4 people is 14.3% this year. Naturally, those renting a serviced office in groups of 10 people and more significantly diminished and constitute only 0.8%.



4 : Do you plan to renew your contract?

2019

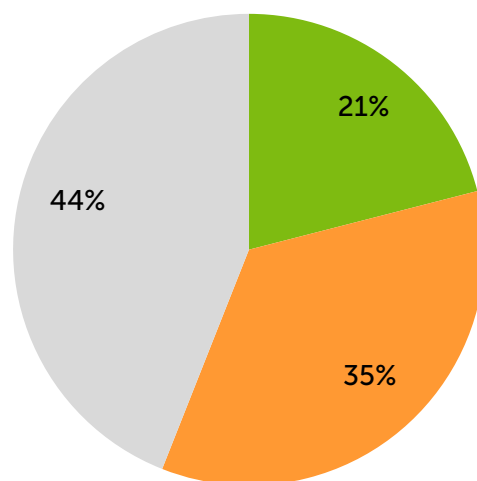


■ Yes

■ No

■ Don't know

2020



■ Yes

■ No

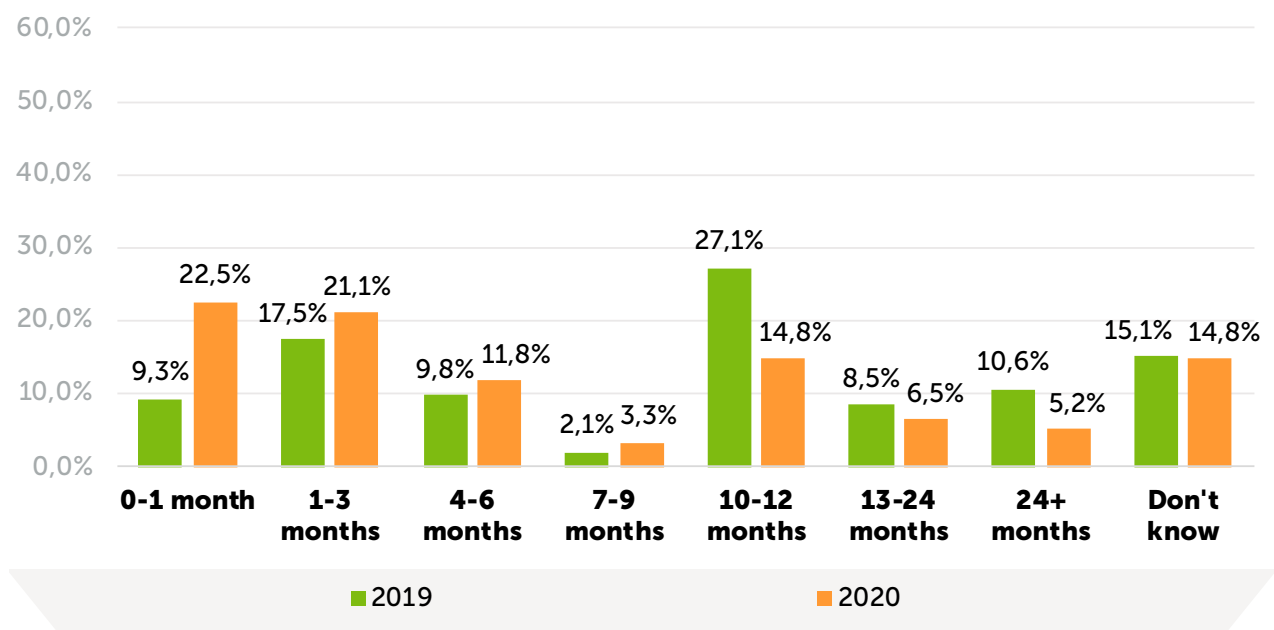
■ Don't know

This year businesses found themselves in a difficult and uncertain situation. Under these circumstances, a lot of them had to cancel their memberships and switch to monthly options. With companies being on the brink of survival, a lot of workspaces were standing empty. The benefit of serviced offices is that they offer a flexible agreement that can be adjusted depending on the needs of the client.

44% of respondents are not sure yet whether or not to renew their membership. 35% decided to opt out, which is 21%-points more than last year. The minority of 21% are still willing to proceed with their membership.

5 : What length of contract did you sign?

2019 / 2020

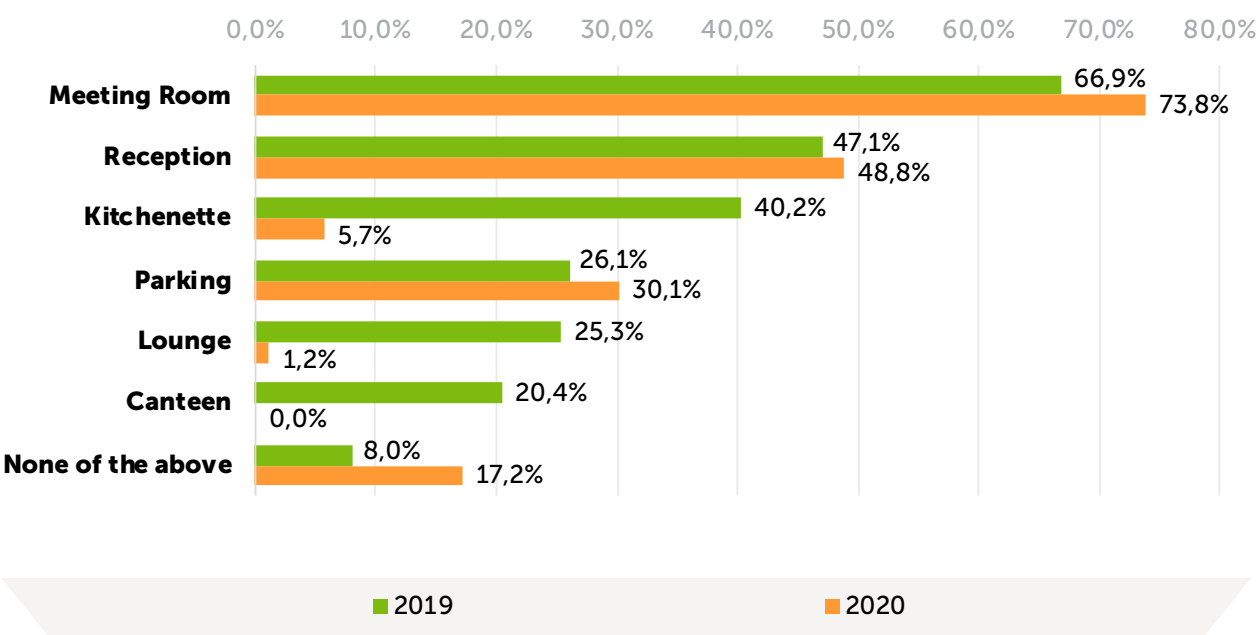


We can see that 22.5% of respondents concluded contracts up to 1 month of length. Another 21.1% signed contracts of 1-3 months. On the other hand, we can spot a downfall of 12.3%-points in the number of those who signed 10-12-month contracts. With the overall vagueness brought about by this year's pandemic, companies are trying to secure their already difficult state. On the upside, flexible offices allow to make modifications and select the optimal option that suits the needs of your business.



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

2019 / 2020

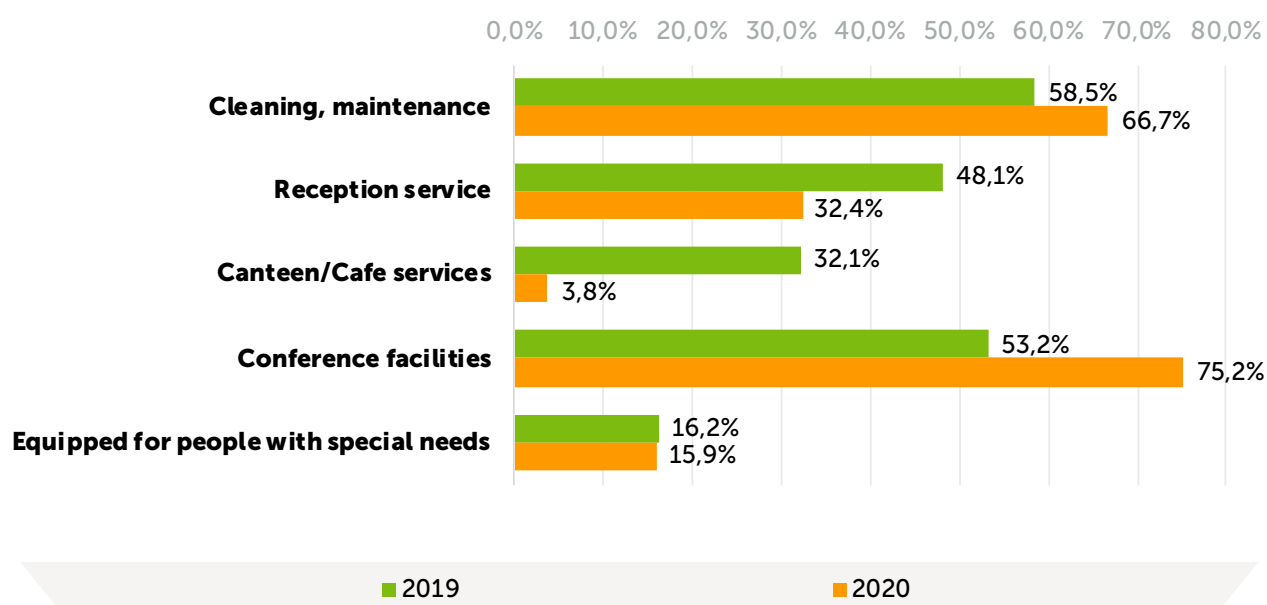


With the Coronavirus outbreak, there have been certain restrictions regarding the services allowed in a shared office space. Mostly, this concerned common areas like business lounge and kitchen, which can be seen in the survey results – only 5.7% of our respondents used the kitchen, none of them used the canteen, and only 1.2% used the lounge. Traditionally, meeting rooms maintain the leading position among the services used by our respondents. 48.8% used the services at the reception, a little over 30% used the parking, and 17.2% used none of the listed services.



7 : Which services are the most important to you?

2019 / 2020

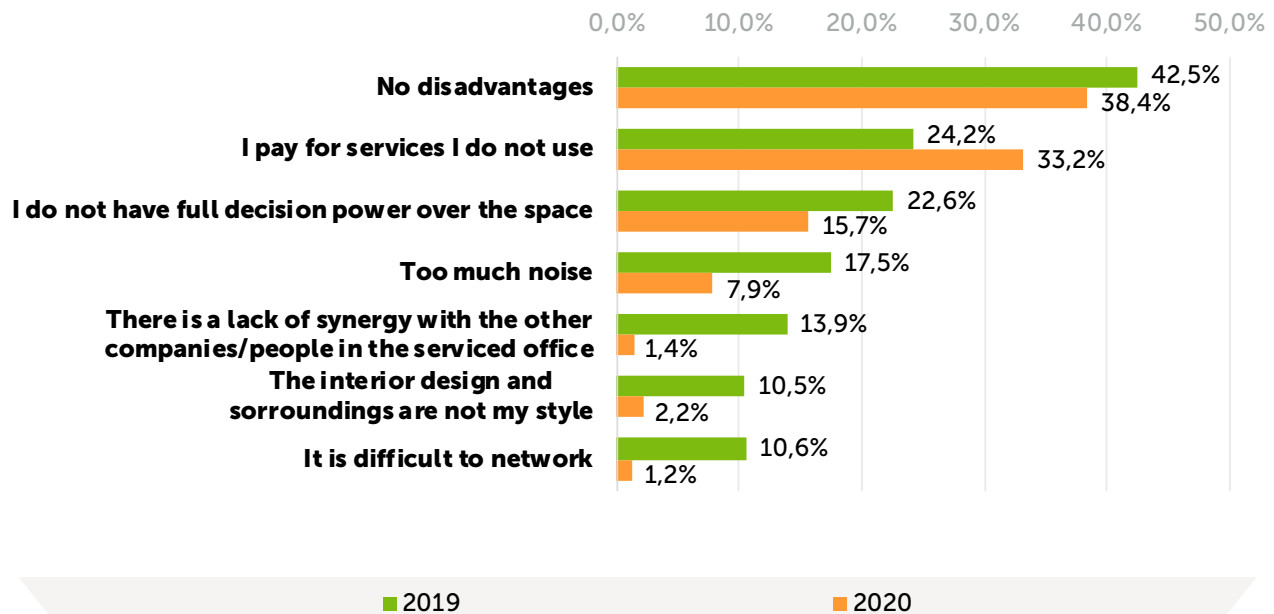


After the gradual reopening, we noticed a high demand for meeting and conference rooms among our clients. Thus, it is not surprising to see, that it is the most important service for over 75% of respondents. The second most important service is cleaning and maintenance, which is natural because of today's sanitary requirements. There was a significant decrease among those who value canteen/ café services – 28.3%-points. 32.4% of respondents find the services at the reception to be important. The number of respondents who mentioned facilities for people with special needs remains relatively unchanged.



8 : What are the disadvantages of serviced offices?

2019 / 2020

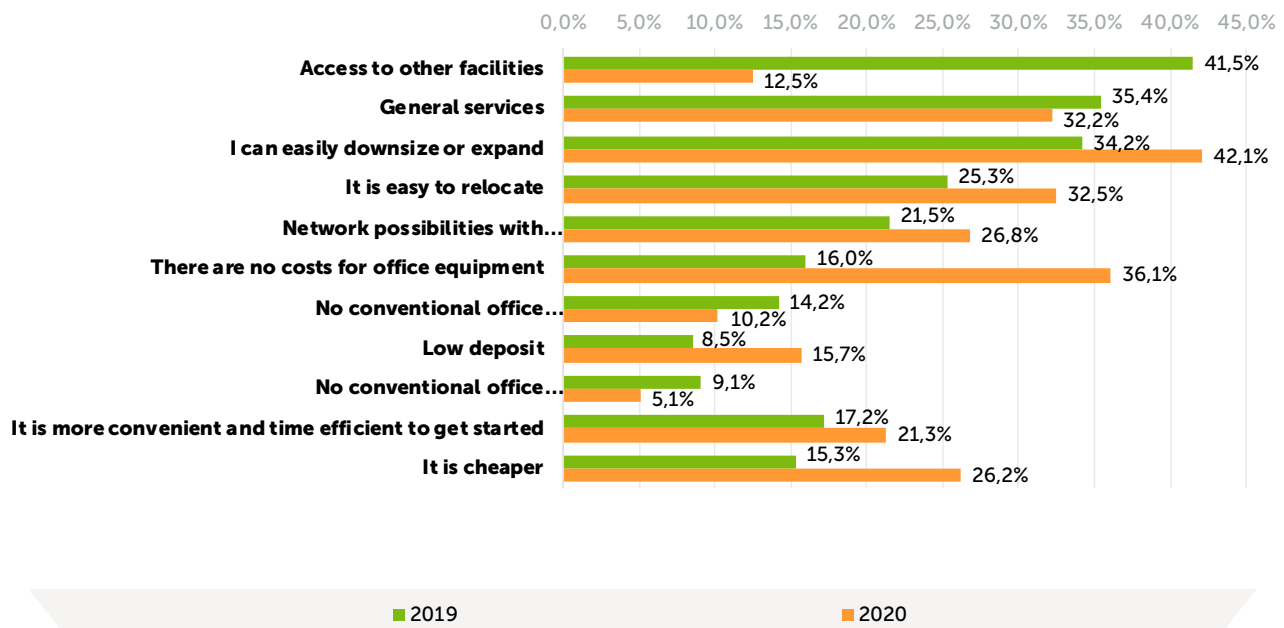


Just like last year, most of our respondents find no disadvantages in the serviced office they use. 33.2% this year think that they pay for services that they don't use. This may be especially relevant now that there are certain restrictions regarding the latter. Over 15% feel that they do not have full decision power over the space. The amount of those who think that there is too much noise decreased by 9.6%-points. As now there is a requirement for social distancing, only a little over 1% worry about synergy with other companies and networking.



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

2019 / 2020

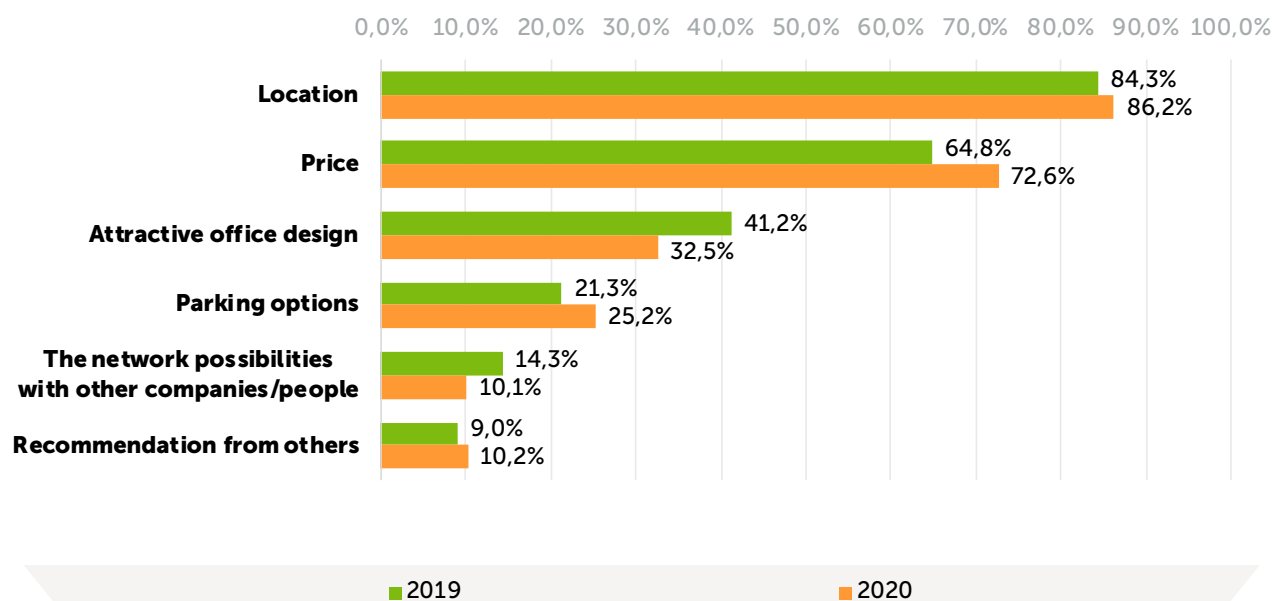


In 2020, the majority of our respondents chose a serviced office over a traditional one due to the flexibility allowing them to downsize or expand easily. 32.5% appreciate that it is easy to relocate. 32.2% value the general services, and 36.1% like that there are no costs for using office equipment. Especially relevant these days is that a serviced office is cheaper and the deposit is low – according to 26.6% and 15.7% respectively.



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

2019 / 2020

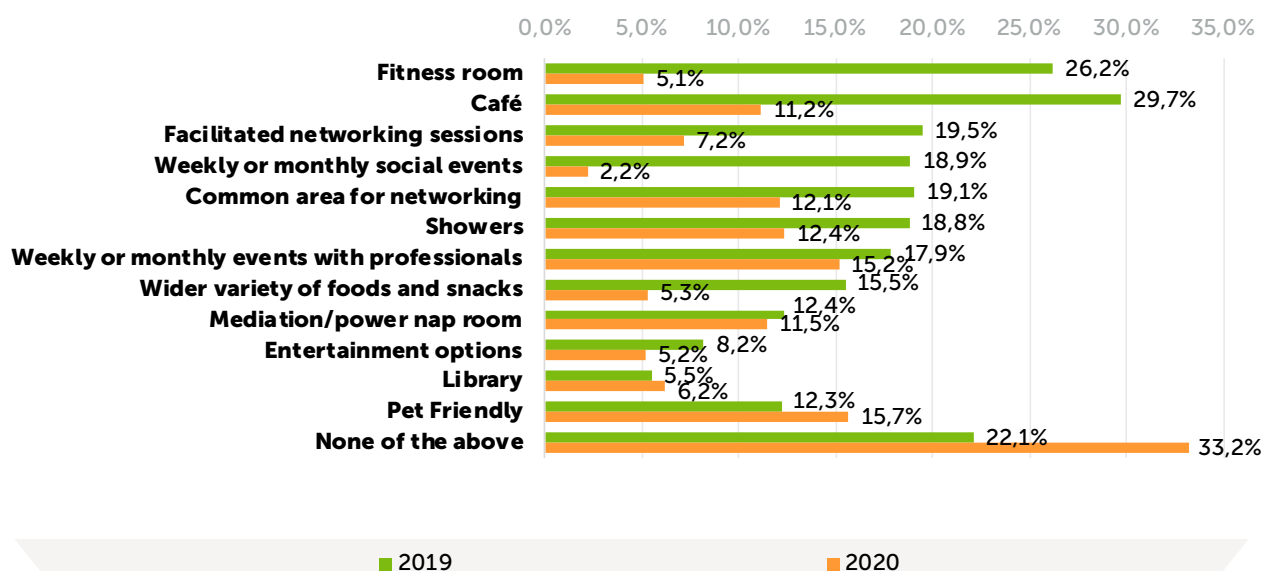


Similar to last year's results, the majority of respondents chose their serviced office basing on location – 86.2%. The number of those who chose their serviced office basing on the price rose by 7.8%-points. Putting aside the price point and safety regulations, 32.5% also paid attention to attractive office design. Over a quarter valued available parking options. 10.2% got the recommendations from others to use a particular serviced office space.

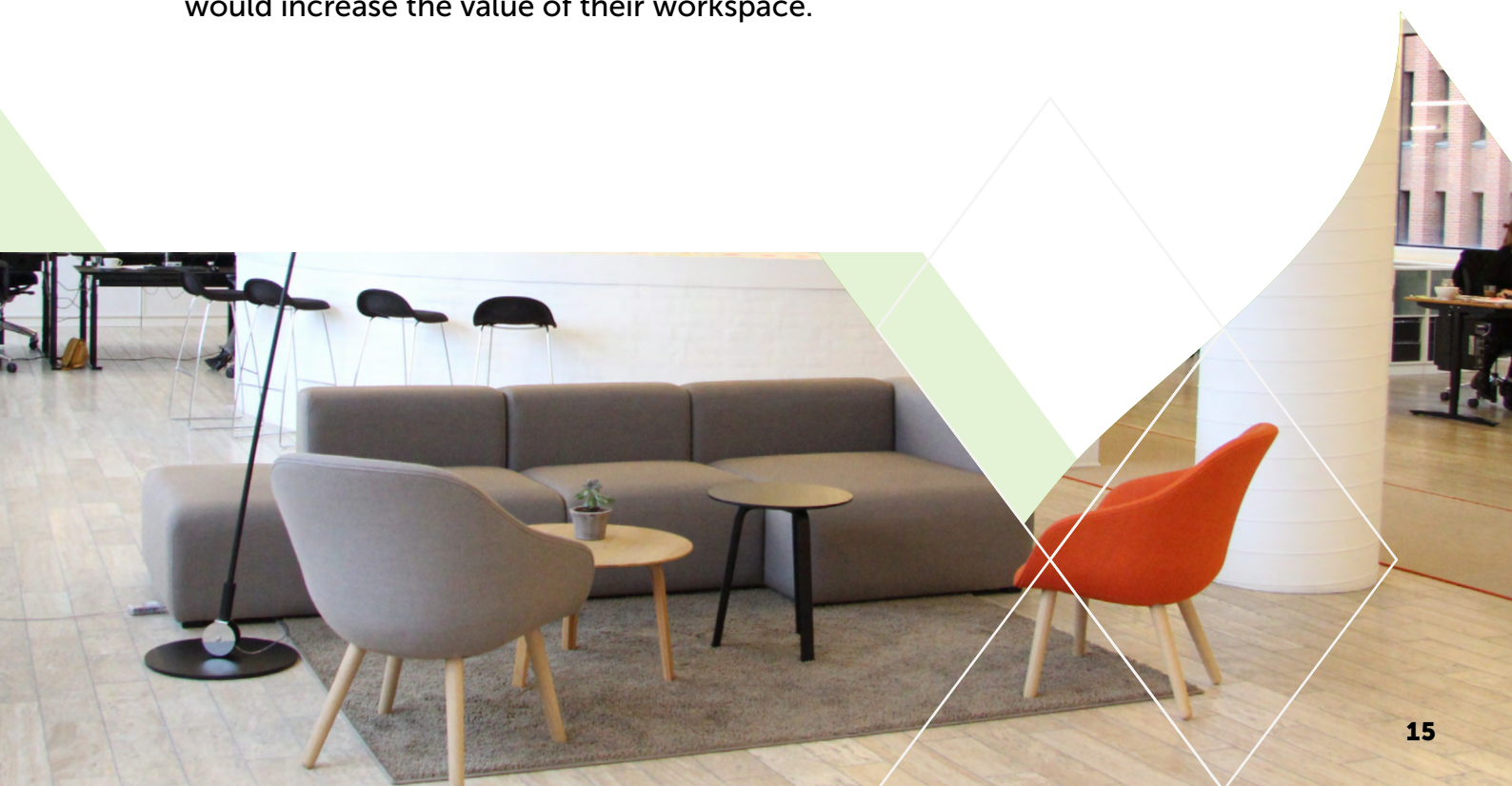


11 : What would increase the value of your serviced office?

2019 / 2020

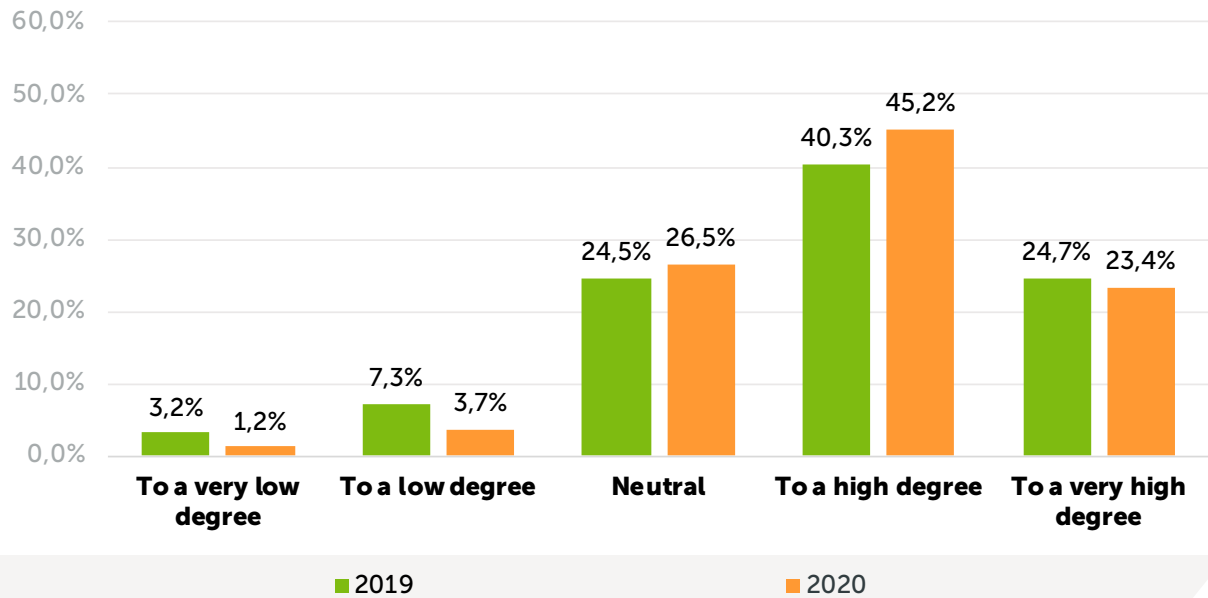


We can clearly spot how priorities of our respondents changed this year because of the pandemic. There was a huge decrease in the number of those who would appreciate if their workspace had a fitness room (21,1%-points), facilitated networking sessions (18,5%-points), regular social events (16,7%-points), wider variety of foods and snacks (10,2%-points), and so on. Over 15% this year pointed out, that they would like it if their workspace was pet friendly. An overwhelming 33,2% responded that none of the listed services would increase the value of their workspace.



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

2019 / 2020



Over 45% of our respondents this year reported to be highly satisfied with the workspace they are renting. 23.4% reported a very high degree of client satisfaction. The number of those who maintained status quo rose by 2%-points. It is nice to see that the amount of those whose expectations were met to a low and very low degree decreased by 3.6 and 2%-points respectively.



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.

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other surveys**

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