

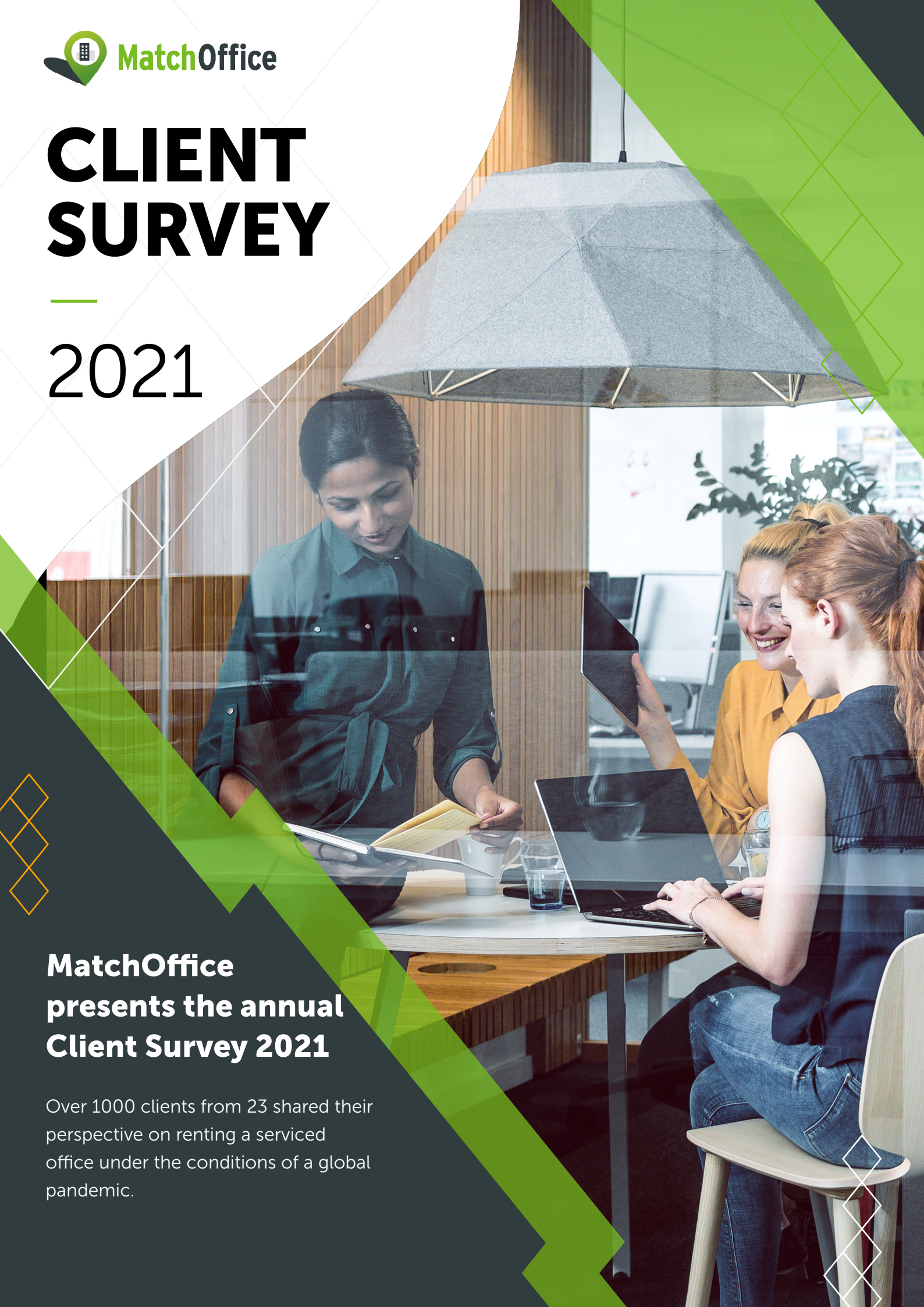
# CLIENT SURVEY

2021



## MatchOffice presents the annual Client Survey 2021

Over 1000 clients from 23 shared their perspective on renting a serviced office under the conditions of a global pandemic.





# Table of Contents

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

# Introduction

MatchOffice is happy to present to your attention our **Client Survey 2021**, conducted for the seventh year in a row. The goal is to find out whether the clients of the European serviced offices are satisfied with their current workspace, what they value the most, and discover the latest tendencies of the market from the client's perspective.

**In 2020**, the commercial real estate industry took an interesting turn that developed further in 2021. The trends that picked up have now become well established. The majority of employees agree there are advantages to both working in an office and working from home. As the situation stabilizes and people return to their workspaces, we are expecting to see different hybrid working models in action. We have also enquired service providers about their perspective on the market, which can be found in the [MatchOffice Industry Survey 2021](#).

Now it is more than ever interesting to observe what challenges the future holds for the industry. One thing is certain – we have entered a new chapter in the evolution of serviced offices. Hopefully, you find this year's report interesting and insightful, enjoy your reading!



**Jakob Dalhoff**  
CEO, MatchOffice  
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# Key Results

## Our findings.

### **Established tendencies**

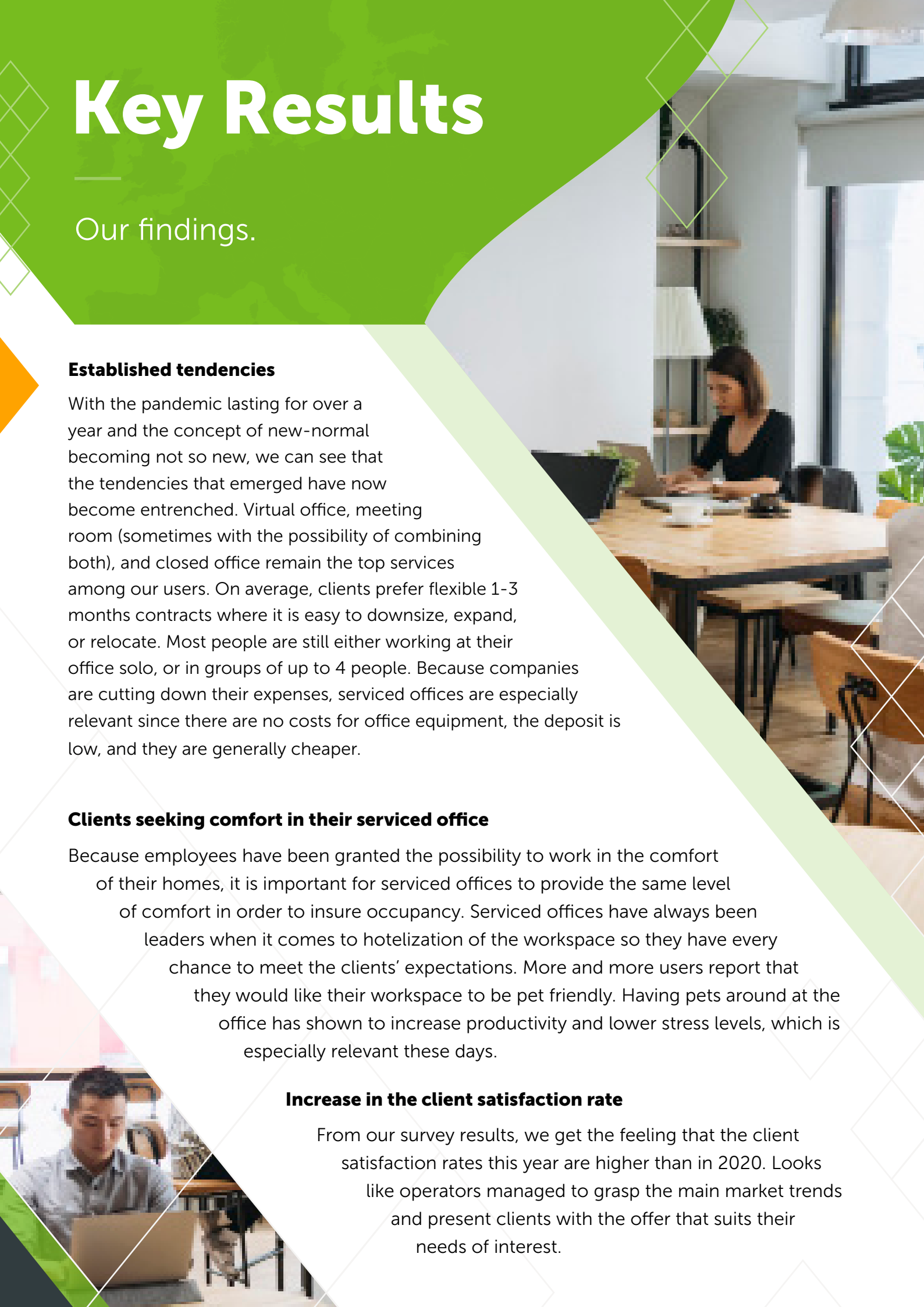
With the pandemic lasting for over a year and the concept of new-normal becoming not so new, we can see that the tendencies that emerged have now become entrenched. Virtual office, meeting room (sometimes with the possibility of combining both), and closed office remain the top services among our users. On average, clients prefer flexible 1-3 months contracts where it is easy to downsize, expand, or relocate. Most people are still either working at their office solo, or in groups of up to 4 people. Because companies are cutting down their expenses, serviced offices are especially relevant since there are no costs for office equipment, the deposit is low, and they are generally cheaper.

### **Clients seeking comfort in their serviced office**

Because employees have been granted the possibility to work in the comfort of their homes, it is important for serviced offices to provide the same level of comfort in order to insure occupancy. Serviced offices have always been leaders when it comes to hotelization of the workspace so they have every chance to meet the clients' expectations. More and more users report that they would like their workspace to be pet friendly. Having pets around at the office has shown to increase productivity and lower stress levels, which is especially relevant these days.

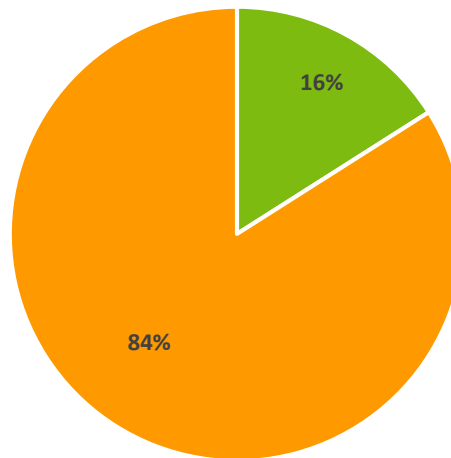
### **Increase in the client satisfaction rate**

From our survey results, we get the feeling that the client satisfaction rates this year are higher than in 2020. Looks like operators managed to grasp the main market trends and present clients with the offer that suits their needs of interest.



# 1 . Have you used a serviced office since the start of the COVID-19 pandemic?

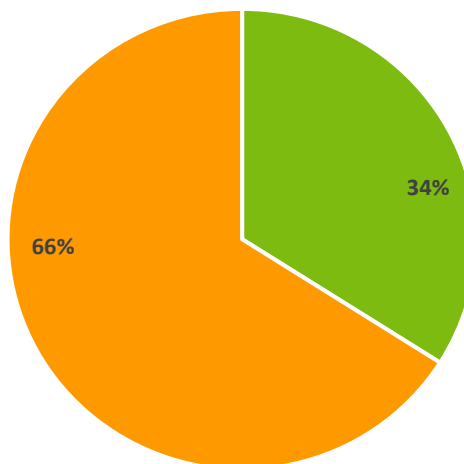
**2020**



■ Yes

■ No

**2021**



■ Yes

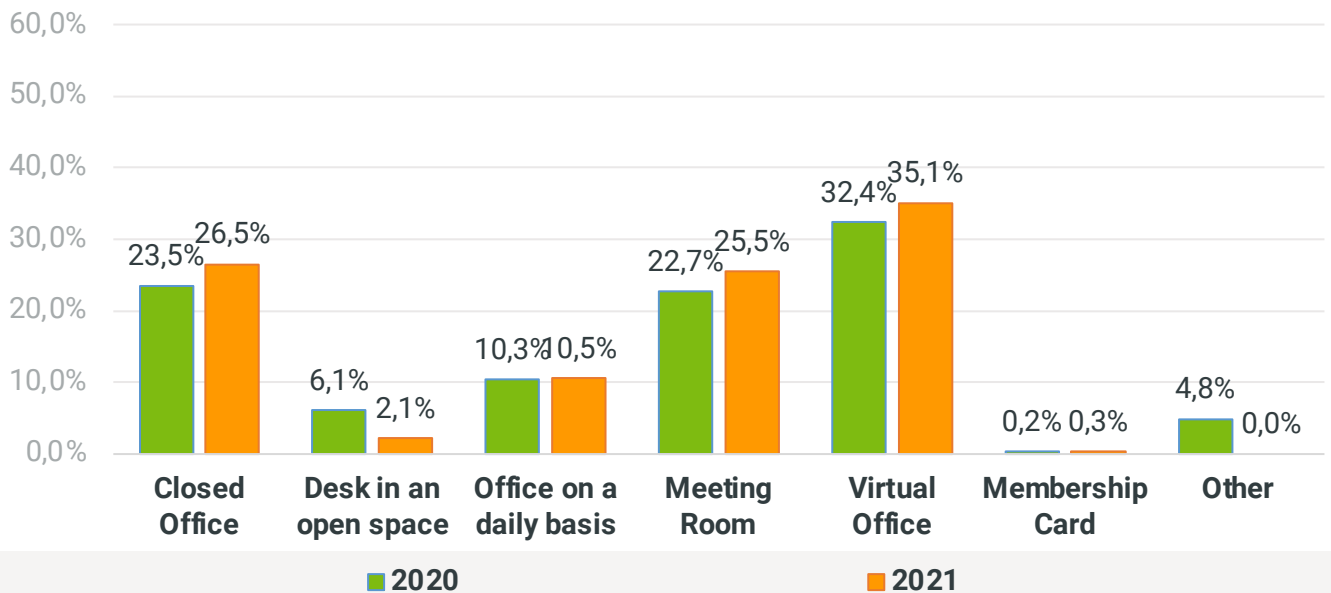
■ No

Following the last year's major drop in office occupancy, 2021 brought about steady changes for the better. While the majority of our respondents are still working from home office, the number of those, who used their services offices is more than double.

Since the start of the COVID-19 pandemic, operators gained a lot of valuable experience and learned how to make their workspaces meet the clients' requirements in terms of safety, flexibility, and cost-effectiveness. With more people getting vaccinated, it is expected that the number of those using a serviced office will grow exponentially.

## 2 . What sort of contract do you have?

2020 / 2021



This year's survey results demonstrate stability regarding the tendencies in client demands. Virtual office, meeting room (sometimes with the possibility of combining both), and closed office remain the top services among our users. This choice is dictated by the new realia, where most work remotely but would still like their business to have a prestigious address and gather for in-person brainstorming sessions. And those who don't work from home, prefer the safety of a private office.

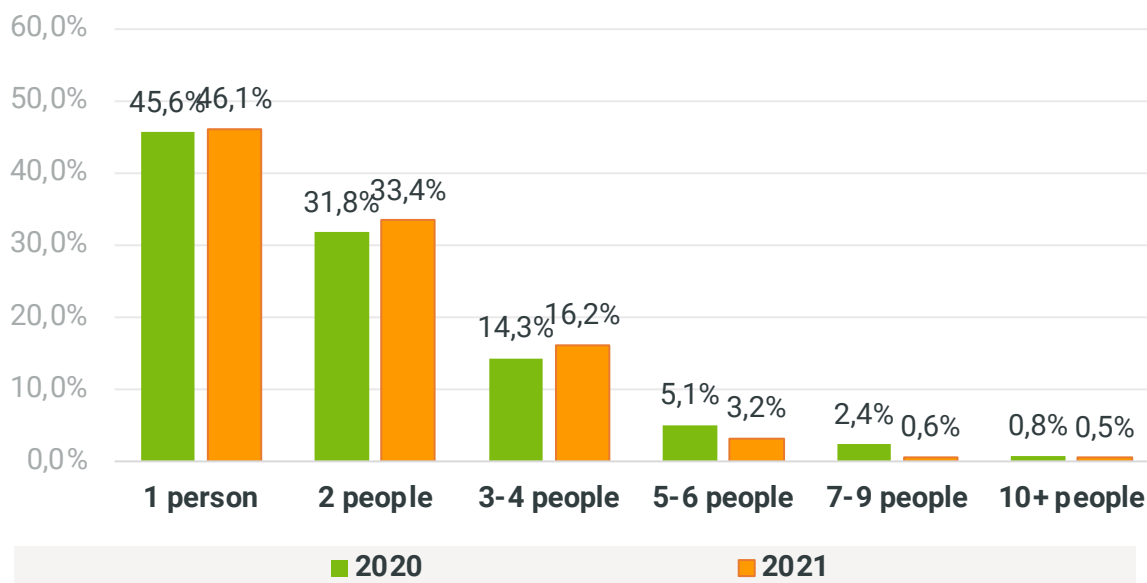
Jakob Dalhoff, CEO of MatchOffice, says:

“ Among the less popular options, we have office on a daily basis, used by 10,5% of our respondents, desk in an open space, used by 2,1%, and membership card – 0,3%. In the current conditions, clients prefer short-term solutions and flexibility.



### 3 . How many people from your firm were using your serviced office since the start of quarantine?

**2020/ 2021**



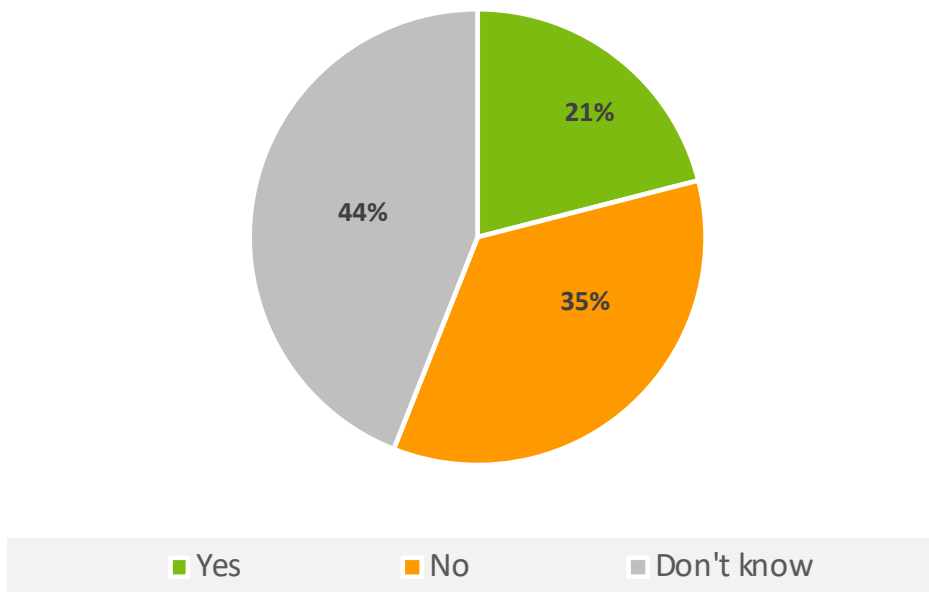
One year after the office workers were sent home due to the pandemic, we can observe that most people are still either working at their office solo, or in groups of up to 4 people. The majority of employees agree there are advantages to both working in an office and working from home. As the situation stabilizes and people return to their workspaces, we are expecting to see different hybrid working models in action.



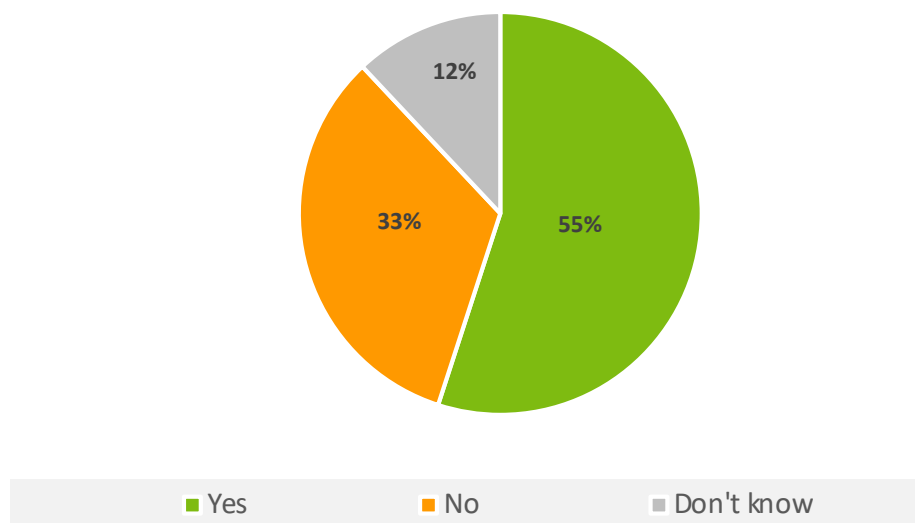


## 4 . Do you plan to renew your contract?

2020



2021



Last year, we saw uncertainty prevailing among our respondents as to whether or not renew their contract. In 2021, more than half decided to proceed with the service they currently use. 33% made up their mind to discontinue their agreements. Only 12% of respondents this year haven't reached a decision regarding their contract renewal.

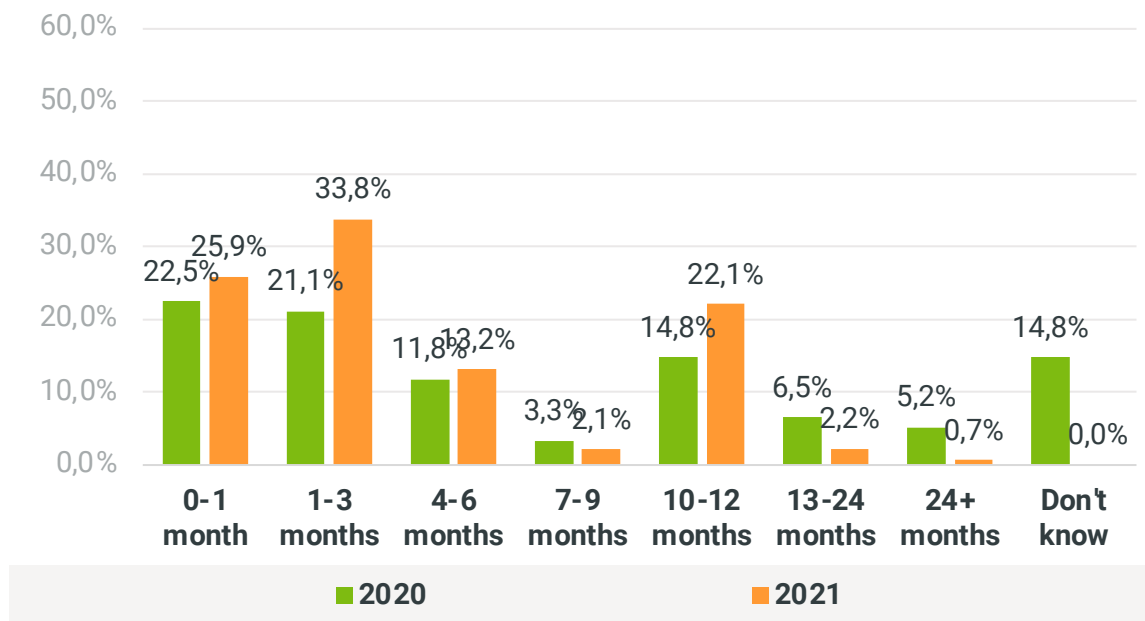
Jakob Dalhoff, CEO of MatchOffice, says:

“ ***In addition to the obvious benefits in the form of numerous services and conditions that stimulate productivity, the office environment plays an important role in training new employees and involving them in your corporate culture.*** ”



## 5 . What length of contract did you sign?

2020 / 2021

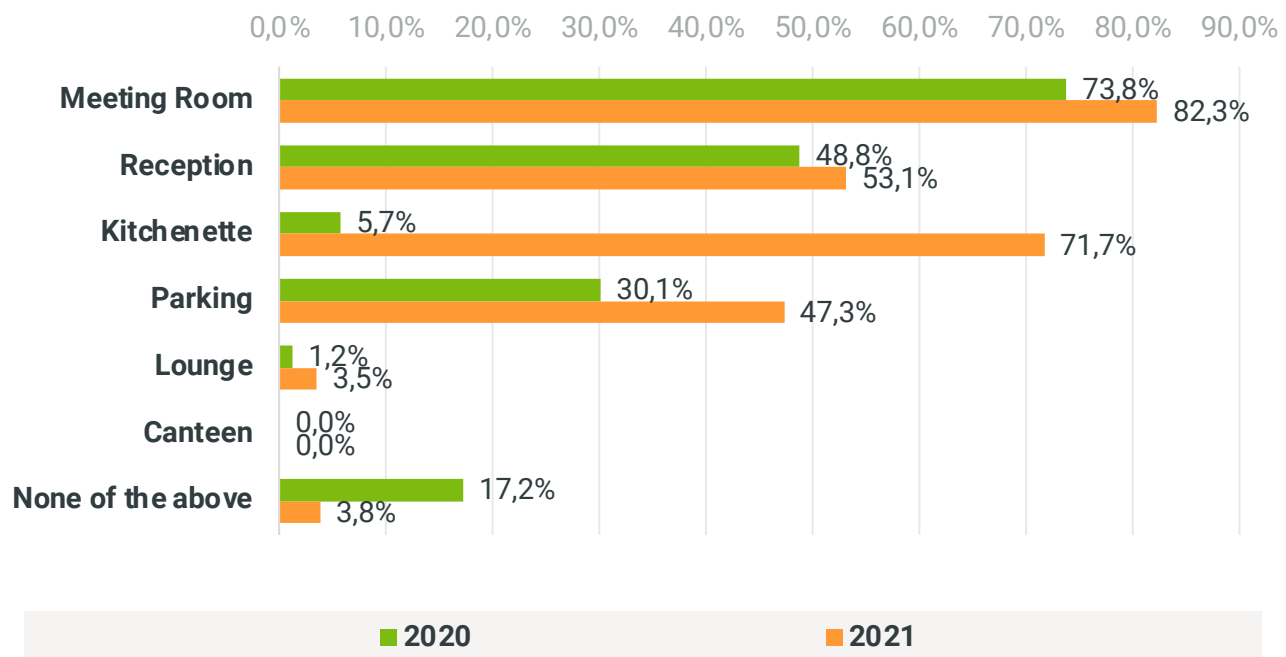


Most respondents this year signed 1-3 months contracts – 33,8%, which is 12,7%-points more than in 2020. Over a quarter of respondents signed 1-month contracts or shorter. 13,2% signed 4-6 months contracts. We could spot a 7,3%-points rise in the share of those who signed 10-12 months contracts. Only 2,2% of respondents signed 1 to 2-year contracts, and less than 1% signed longer contracts.

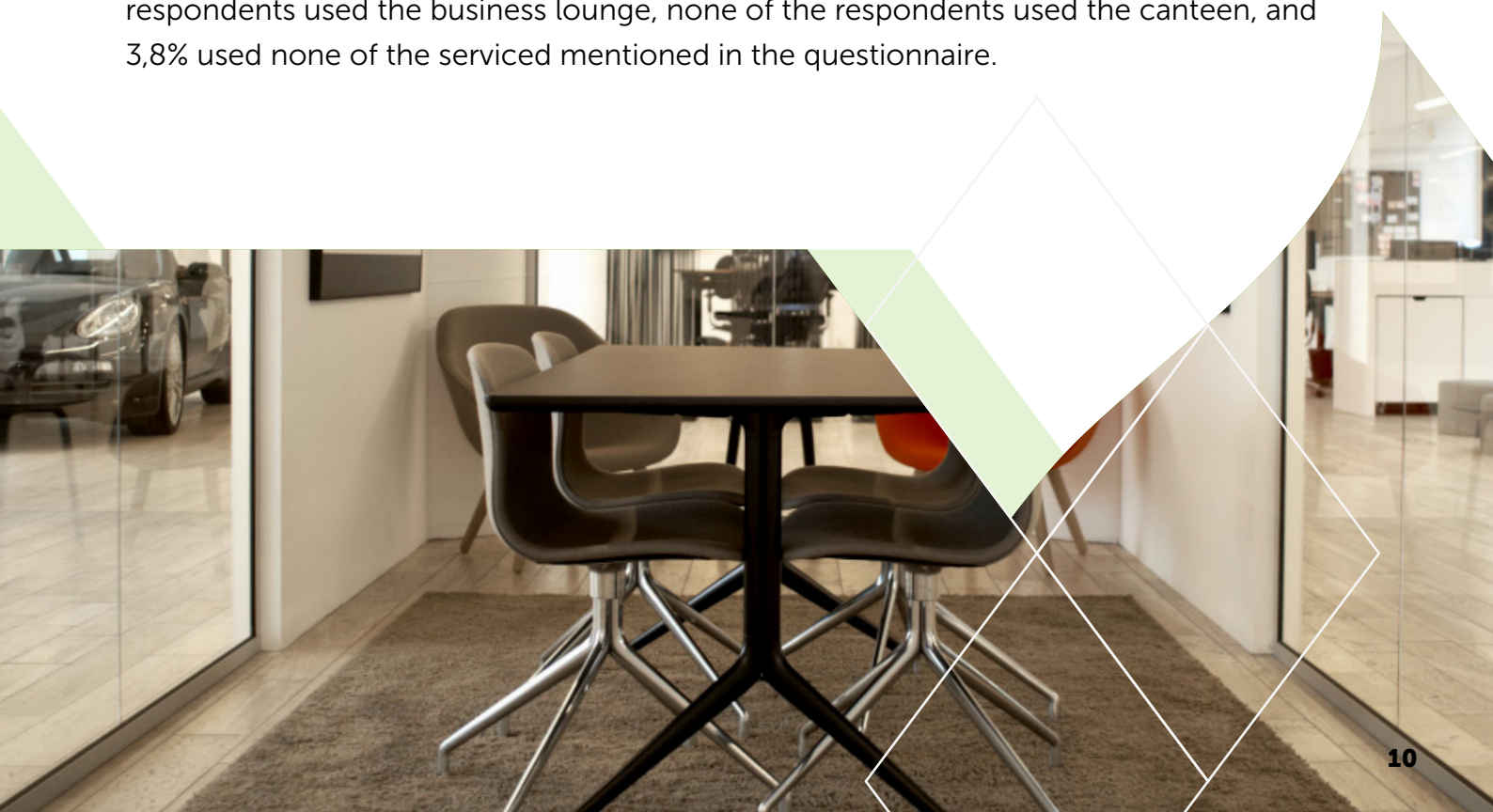
Just like last year, clients prefer flexibility and short-term solutions, where it is possible to move, downsize or expand. As long as the world remains in the state of a pandemic, such trends will most likely remain relevant.

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

2020 / 2021

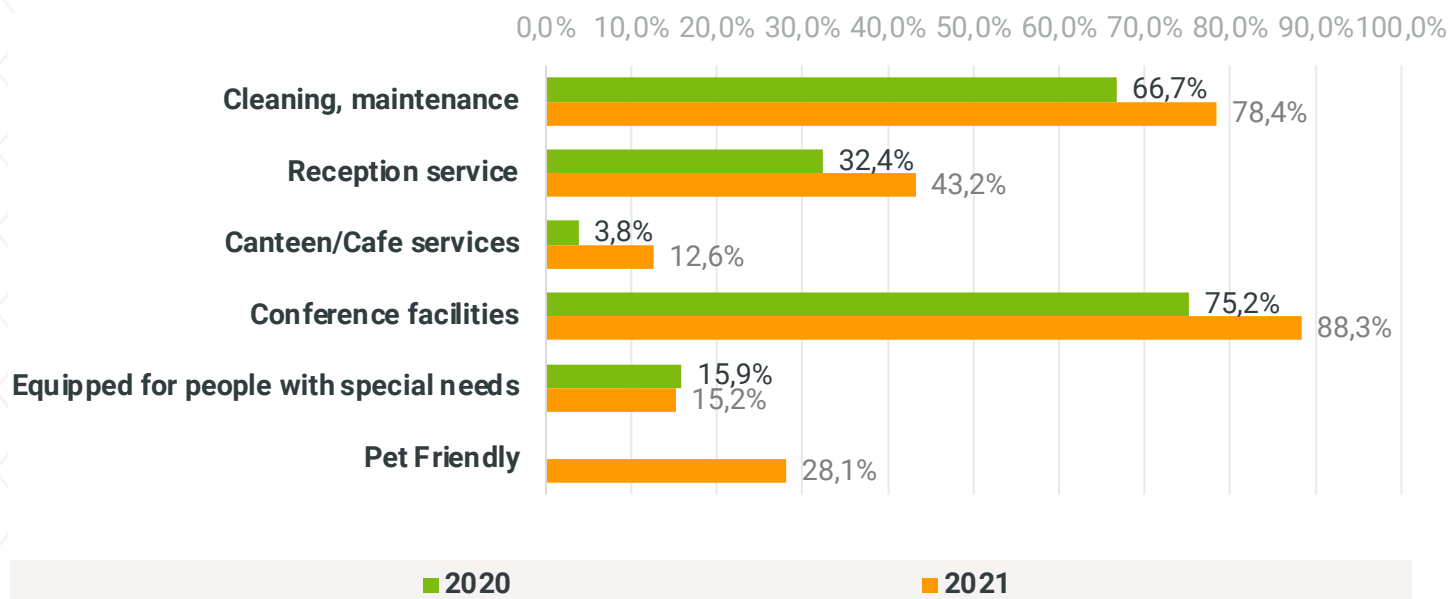


Experience of the two pandemic years shows that renting out meeting rooms either separately, or renting a virtual office with the possibility of using a meeting room has been the most popular service among clients. In 2021, renting meeting rooms was even more popular among our users, than last year. 53,1% of respondents were using the reception, which is 4,3%-points more than in 2020. We can see a significant rise in the number of those who used the kitchenette, a whole 66%-points. The number of respondents who used the parking facility rose as well, this year it's 47,3%. Only 3,5% of respondents used the business lounge, none of the respondents used the canteen, and 3,8% used none of the serviced mentioned in the questionnaire.



## 7 . Which services are the most important to you?

2020 / 2021



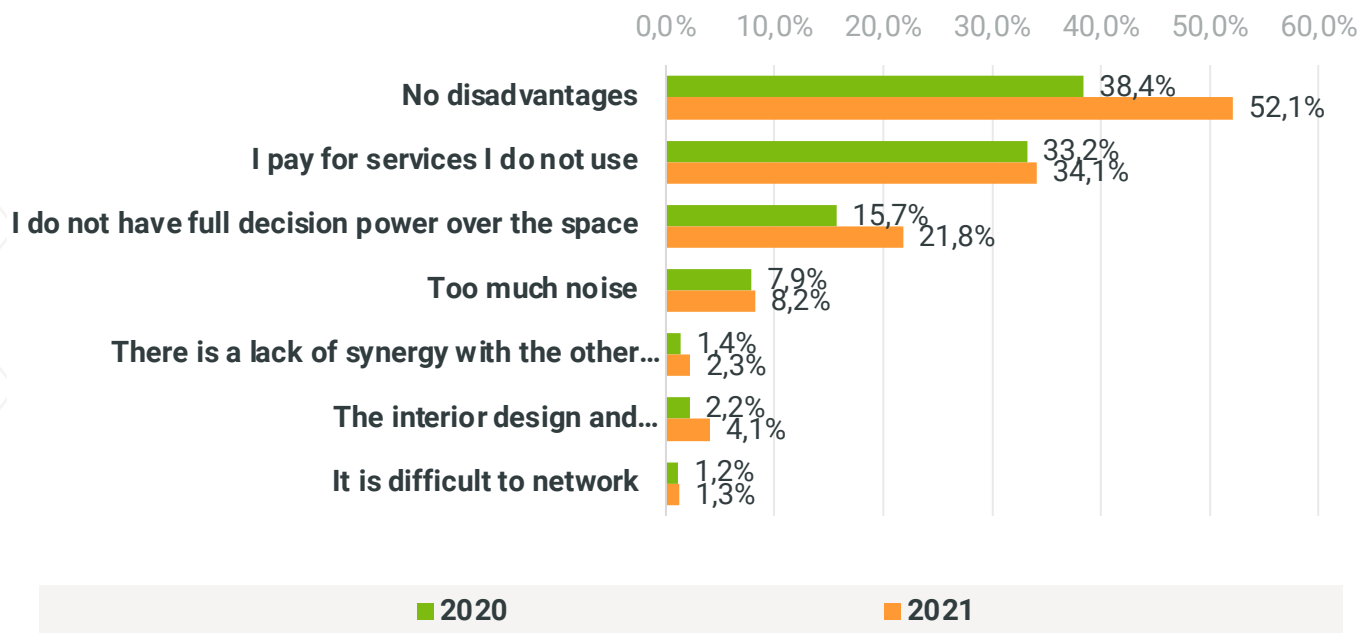
If we take a look at the services our clients considered most important this year, we can spot the same trends as in 2020. Conference facilities were picked the most important by 88,3% of users, 78,4% value cleaning and maintenance services, and 43,2% think reception service to be most important. There has been an 8,8%-points rise in the share of respondents who consider café services most important. The share of those who value workspaces equipped for people with special needs remains almost unchanged.

Unsurprisingly, 28,1% of users this year selected pet friendly workplaces as their top



## 8. What are the disadvantages of serviced offices?

2020 / 2021



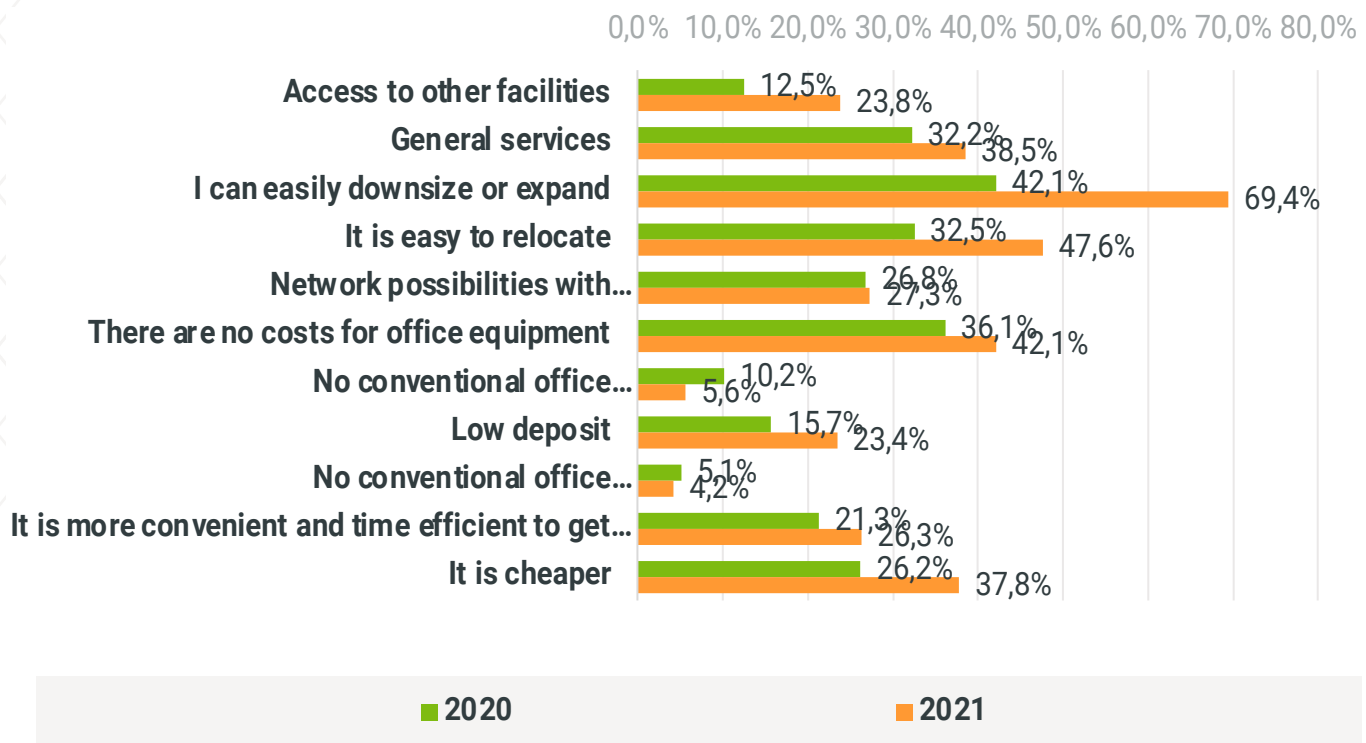
More than half of our respondents – 52,1% think that serviced offices have no disadvantages, this is 13,7%-points more than last year. 34,1% of users think that they pay for services they do not use. 21,8% don't like the fact that they don't have full decision power over the space, this is 6,1%-points more than last year. The number of respondents who consider serviced offices too noisy remained almost the same as last year – 8,2%. As employees are still required to distance, only 2,3% feel lack of synergy with others in a serviced office, and 1,3% think that it is difficult to network. 4,1% think that the interior design and surroundings are not their style.





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

2020 / 2021

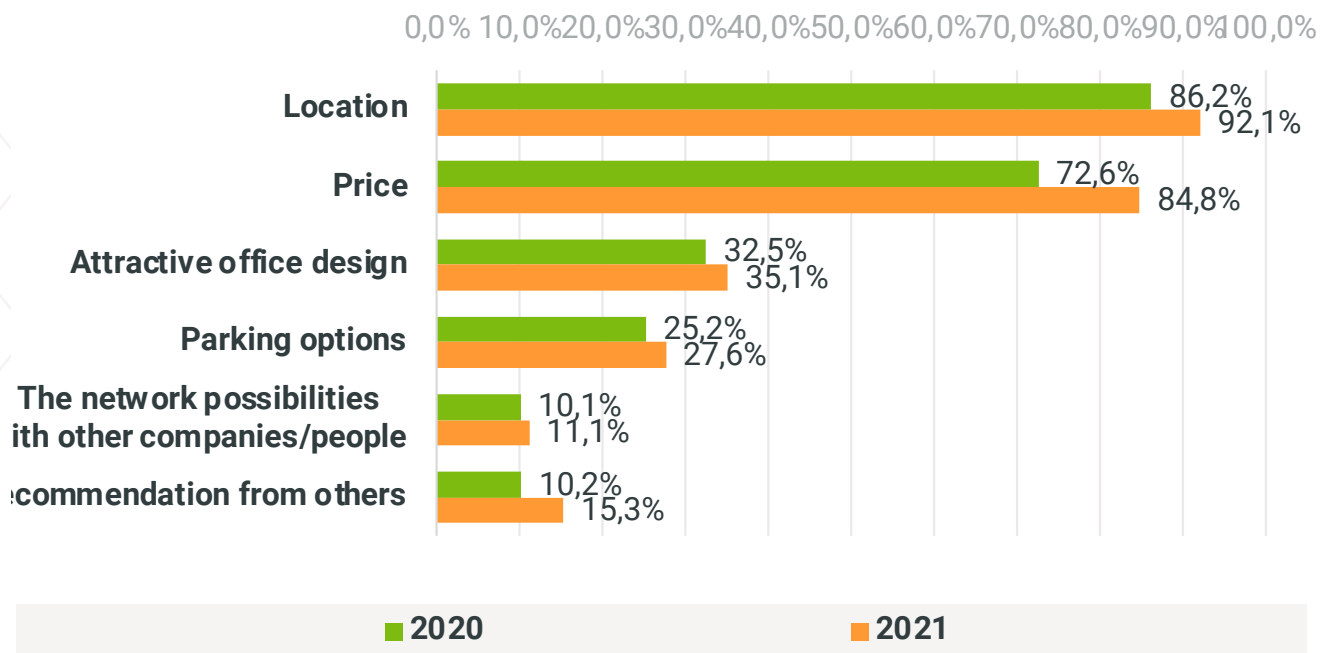


As companies re-imagine and reassess their need for physical space, 69,4% of our respondents chose their current serviced office because it is easy to downsize or expand. 47,6% made their choice based on the fact that it is easy to relocate. Now that companies are cutting down their expenses, it is especially relevant that there are no costs for office equipment, this was the key factor for 42,1% of users. Hence, 37,8% opted for a serviced office over a traditional one as it is cheaper, and 23,4% appreciated the low deposit. 38,5% of our respondents like the general services that are offered and 26,3% think that it is more convenient and time efficient.



## 10 . Why did you choose the serviced office you currently use?

2020 / 2021

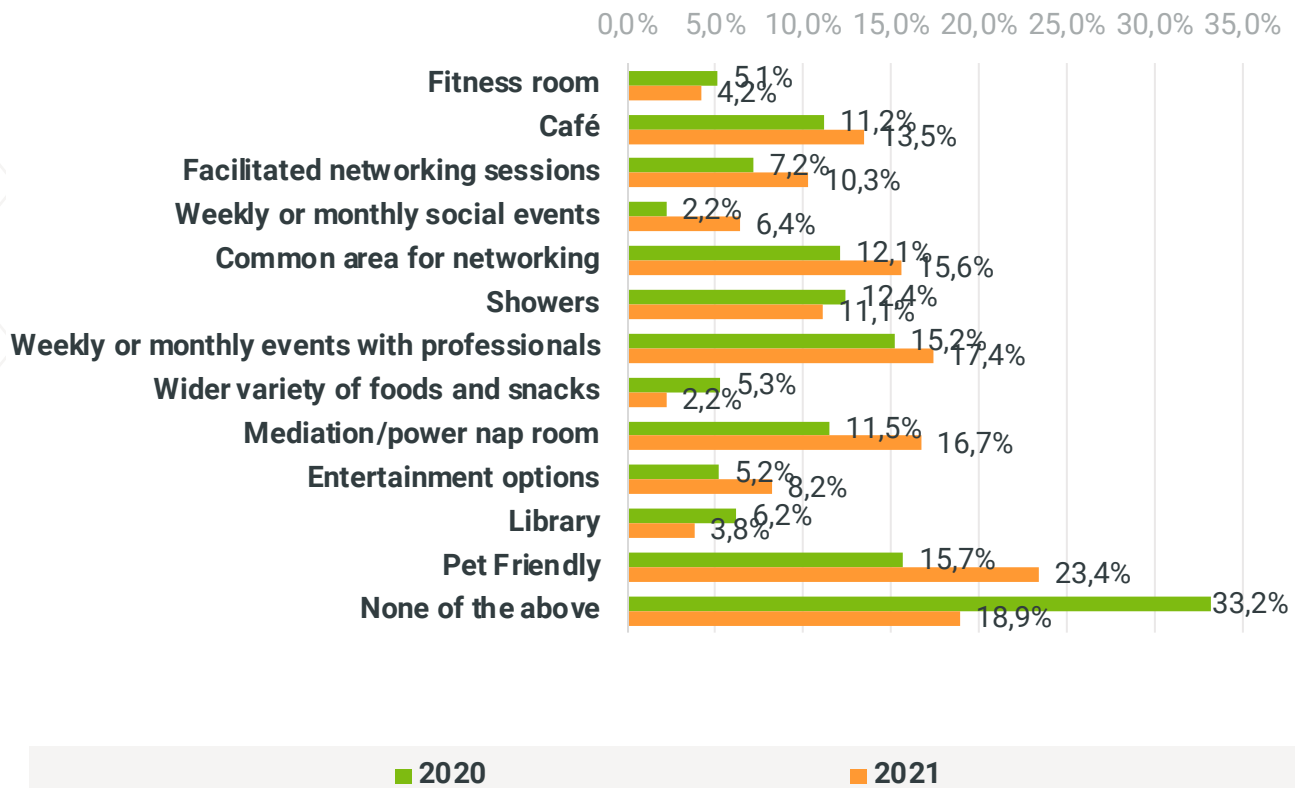


Upon analyzing the year-on-year results of our client survey, it can be seen that the majority of clients choose a serviced office depending on where it's located. In 2021, 92,1% of our respondents chose their workspace because of its location. Price is the second most popular factor affecting the choice of the serviced office. This year there was a 12,2%-point rise among clients who based their decision on pricing. 35,1% chose their workspace because of the attractive office design. 27,6% opted for a workspace that offers convenient parking options nearby. 15,3% of our respondents chose their serviced office because of recommendations from others, this is 5,1%-points more than in 2020. And finally, 11,1% joined a space with likeminded professionals and networking opportunities.



## 11 . What would increase the value of your serviced office?

2020 / 2021

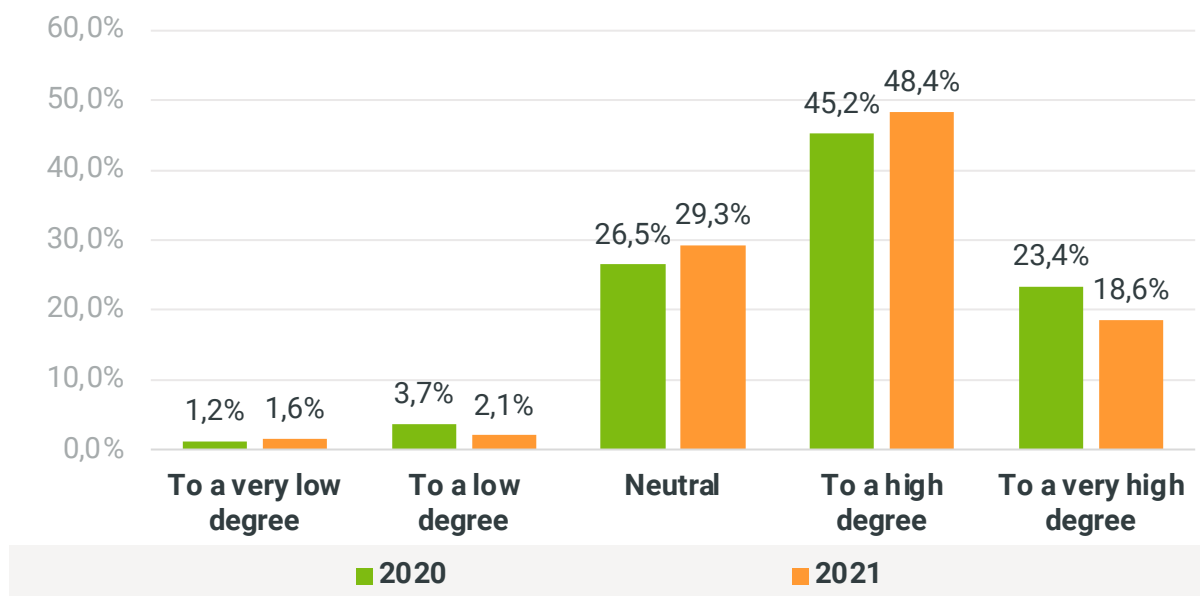


This year, 23,4% of respondents indicated that it would increase the value of their serviced office, if it was pet friendly. This doesn't come as a surprise, considering the unforeseeable circumstances we have been living in for more than a year. Employees seek comfort and improvement of their work/life balance. 17,4% of respondents would appreciate weekly or monthly events with professionals to upgrade their skills. 16,7% would like their workplace to have meditation or power nap rooms where they could relax and unwind. 16,6% of respondents mentioned common areas for networking as an added plus to their workspace. Another 13,5% would like to see a café on site.

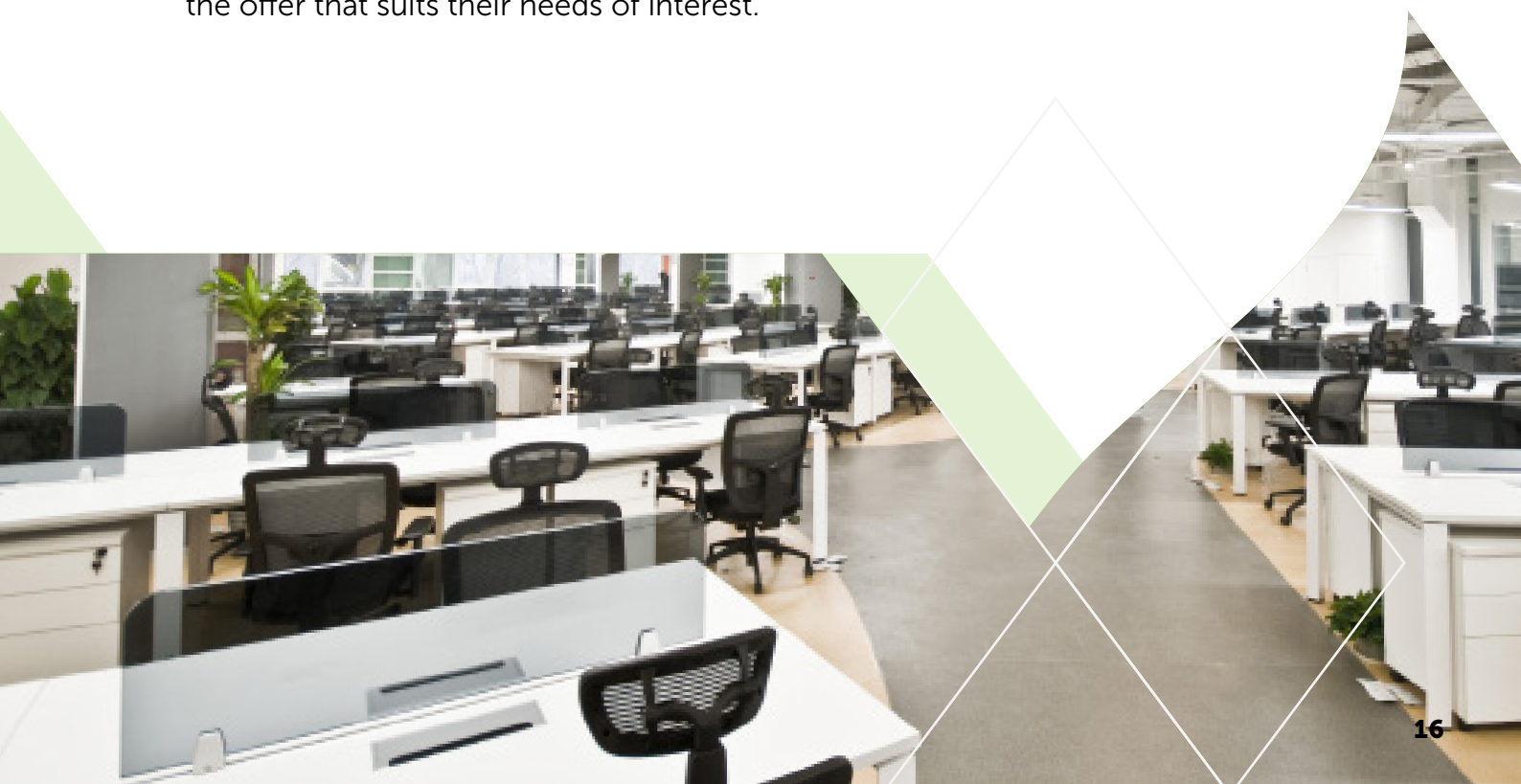


## 12 . How well does your serviced office meet your expectations?

2020 / 2021



Like in 2020, most of our respondents – 48,4% are satisfied with their serviced office to a high degree. The number of clients who feel that their serviced office meets their needs to a very high degree this year is 4,85-points less than last year – 23,4%. Those that reported that their serviced office met their expectations to a low degree constitute only 2,1% and to a very low degree – 1,6%. These results demonstrate that the satisfaction rates this year are higher than in 2020. Looks like operators managed to grasp the main market trends and present clients with the offer that suits their needs of interest.





# About MatchOffice

**MatchOffice is one of Europe's leading** commercial real estate brokers, cooperating with flexible workspaces since 2004. Almost 12,000 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 2020](#)

[Industry Survey 2021](#)

[Industry Survey 2020](#)



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

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Spain, Switzerland, Luxembourg,  
Poland, France, Belgium, United Kingdom,  
Austria, Italy, India, Singapore, and Hong Kong.**