



CLIENT SURVEY

2022

**MatchOffice
presents the annual
Client Survey 2022**

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

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Introduction

We are pleased to bring to your notice the results of our eighth annual Client Survey 2022. The research aims to determine the clients' satisfaction with their existing workspace, the things they value most, and the most recent market trends as seen through the eyes of the clients of European serviced offices.

In 2022, we could see signs of revival of the industry, despite many unfavorable conditions. The trends of the past years continue to develop, however, now we see that more clients are returning to the office. People are seeking the networking opportunities that they were missing during lockdown. Workspaces in turn are doing their best to provide competitive amenities and a high level of comfort. Additionally, we asked service providers what they thought about the market, and the results are available in the MatchOffice Industry Survey 2022.

It is intriguing to see what difficulties the serviced office market may face in the future, taking the new ways of working, as well as external factors into account. We are now certainly living in a new stage of development for the industry. Please enjoy reading this year's report in the hopes that you find it interesting and insightful.



Jakob Dalhoff
CEO, MatchOffice
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Key Results

Our findings.

Bigger teams are returning to the workspaces

Having worked mostly from homeoffice during two years, people are seeking the networking opportunities with likeminded professionals, which using a serviced office can provide. At this point, the vacancy is still pretty high, and we still don't see teams renting large spaces. Due to hybrid work, when employees may only visit the office a few times a week, firms must choose how to make the most efficient use of available space. Still, we spot a positive tendency regarding bigger teams returning to the office comparing to the results of the previous years' surveys.



Flexibility above all

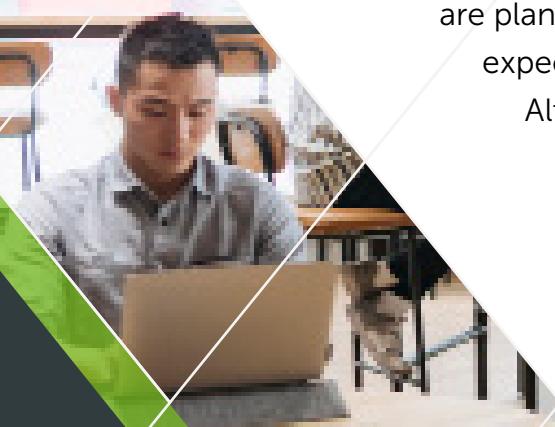
In these uncertain times, clients don't want to commit to a long-term contract anymore. Employees are choosing safer short-term options with the possibility navigate between locations and easily downsize if necessary.

We still see a lot of virtual office users, renting an office on a daily basis, or a meeting room. Flex space is frequently used by businesses as a test environment before deciding on the best long-term solution for their needs.

Expectations for a rise in flex space utilization

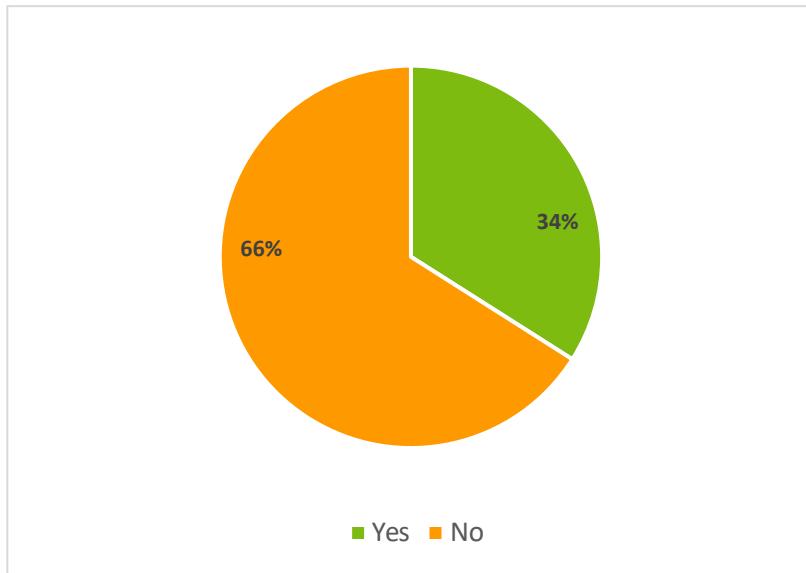
From our survey findings, we could see that the majority of respondents are planning to renew their contracts. Generally, employees are expected to use more flexible office space in the future.

Although, the future of the work may never be the same, there are numerous advantages provided by serviced offices, that will keep attracting professionals all over the world.

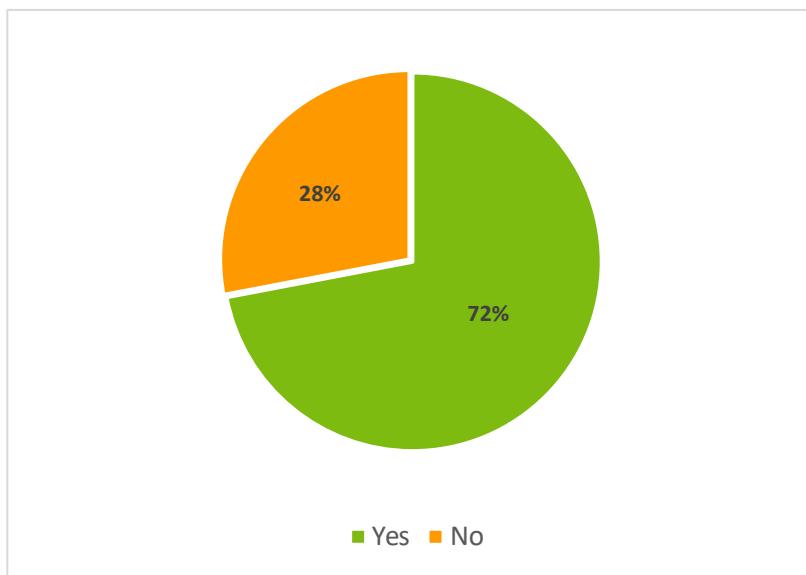


1 . Have you ever used a serviced office?

2021



2022

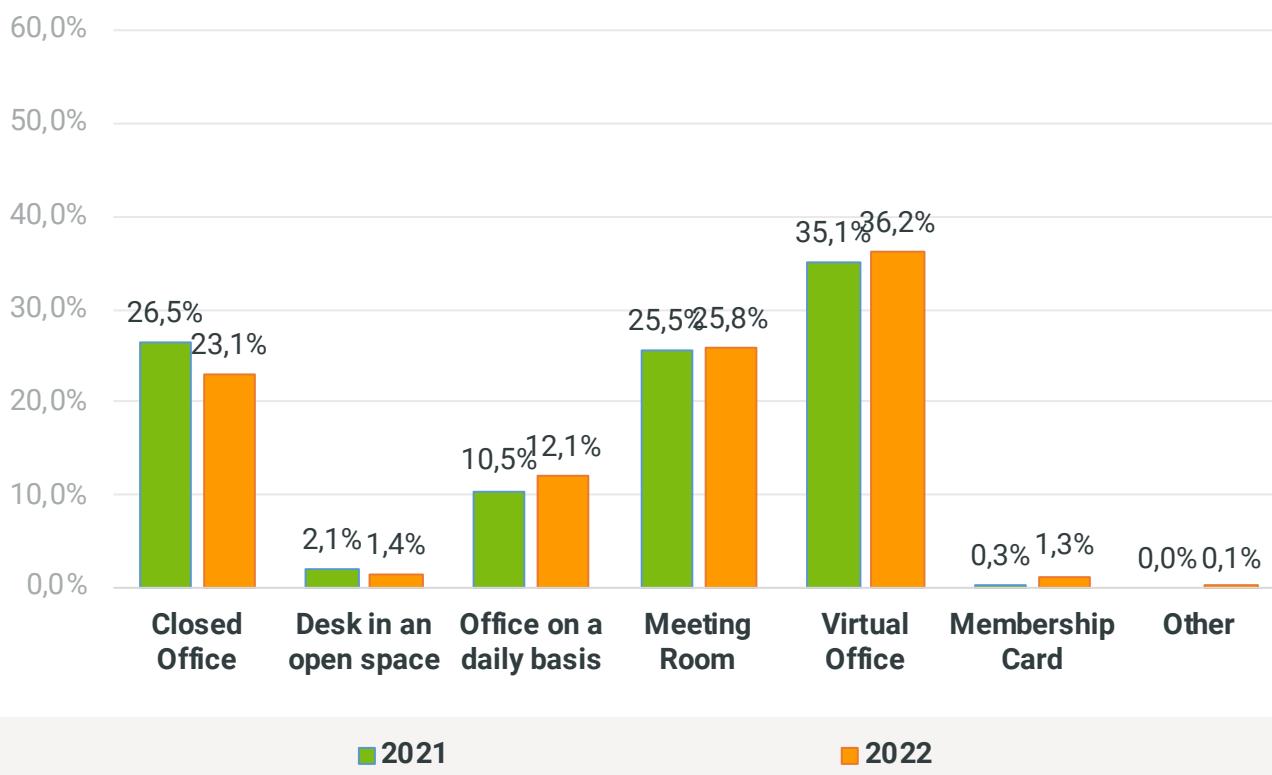


In 2022, the demand for flexible office space is growing comparing to the last year's results. With the implementation of hybrid work models, more and more employees make use of the networking opportunities provided by this type of workspace.

Despite the difficulties that this market has been facing due to the pandemic and inflation, serviced office spaces have evolved and adapted, offering potential clients more flexible and cost-effective solutions with different setup possibilities.

2 . What sort of contract do you have?

2021 / 2022



■ 2021

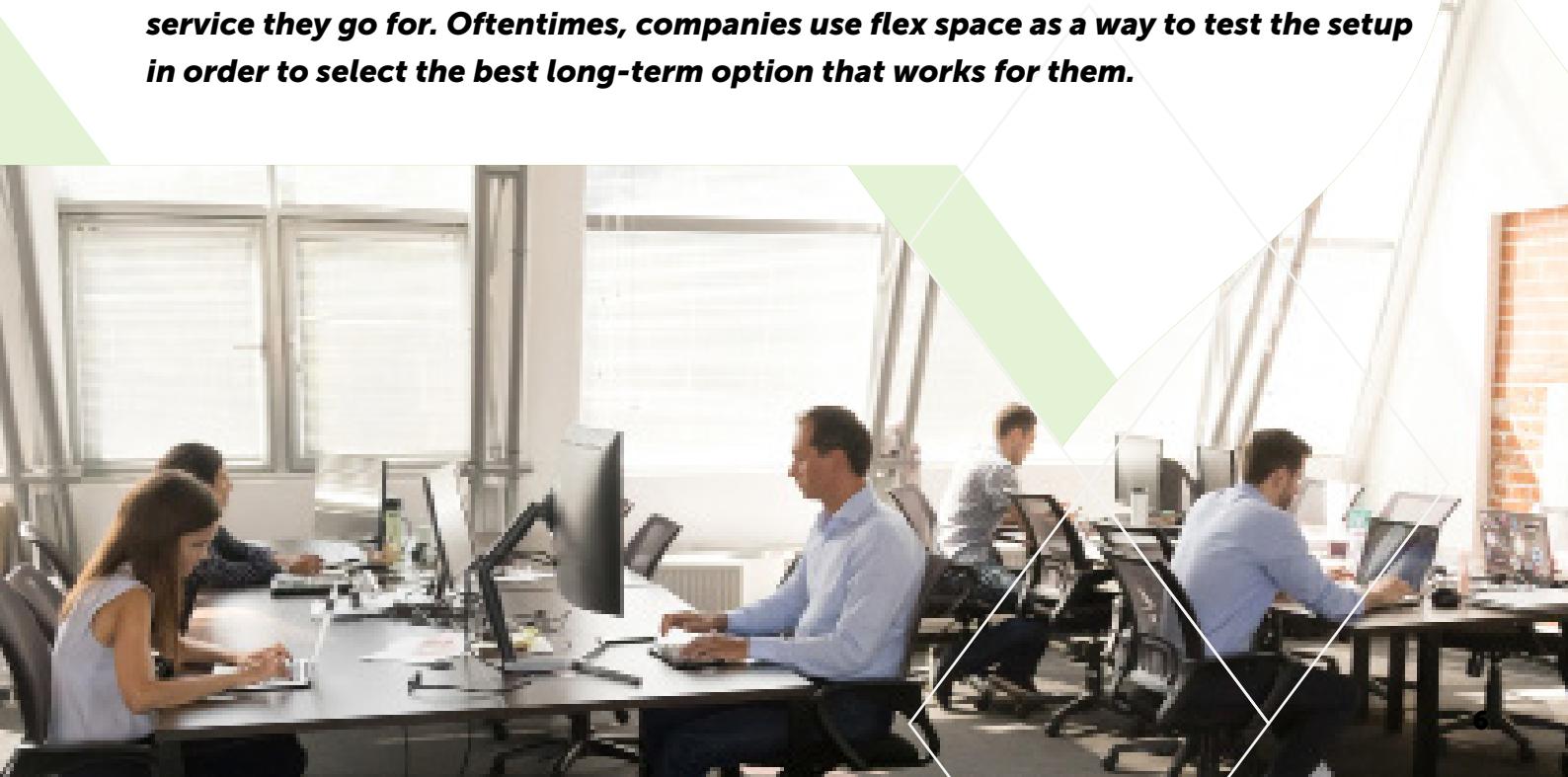
■ 2022

Similarly to 2021, the most popular options are virtual office and meeting room services (or the combination of both). They are followed by closed office and office on a daily basis. In many cases, employees only use flexible office space in certain situations, while working at home most of the time.



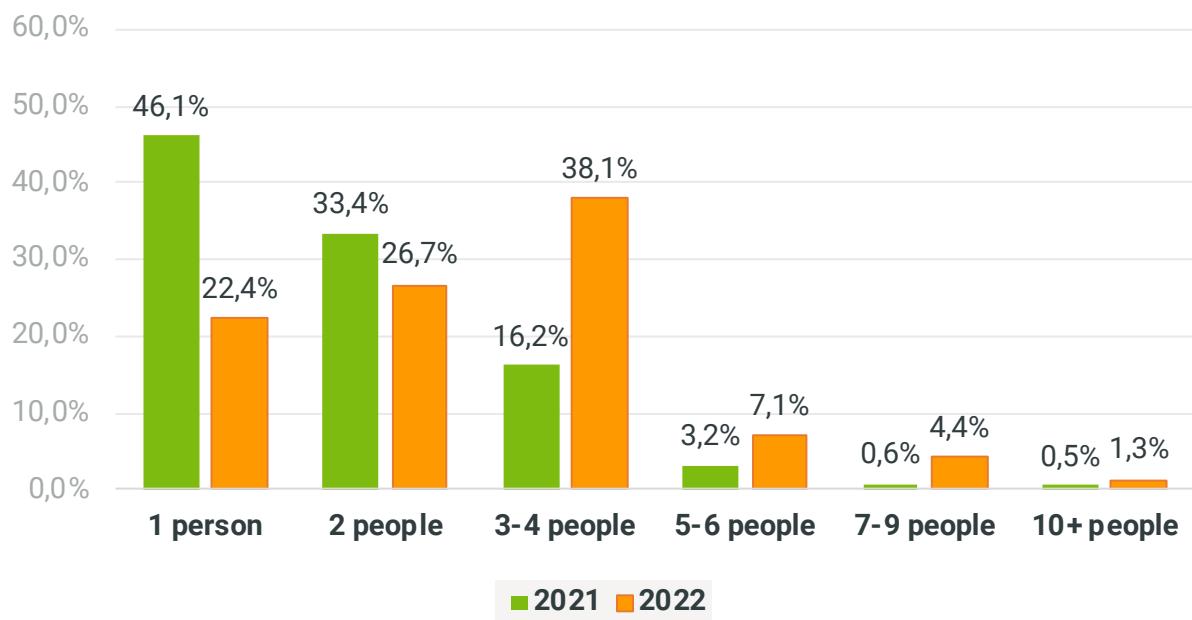
Jakob Dalhoff, CEO of MatchOffice, points out:

Our survey this year demonstrates a stable tendency regarding client choice of the service they go for. Oftentimes, companies use flex space as a way to test the setup in order to select the best long-term option that works for them.



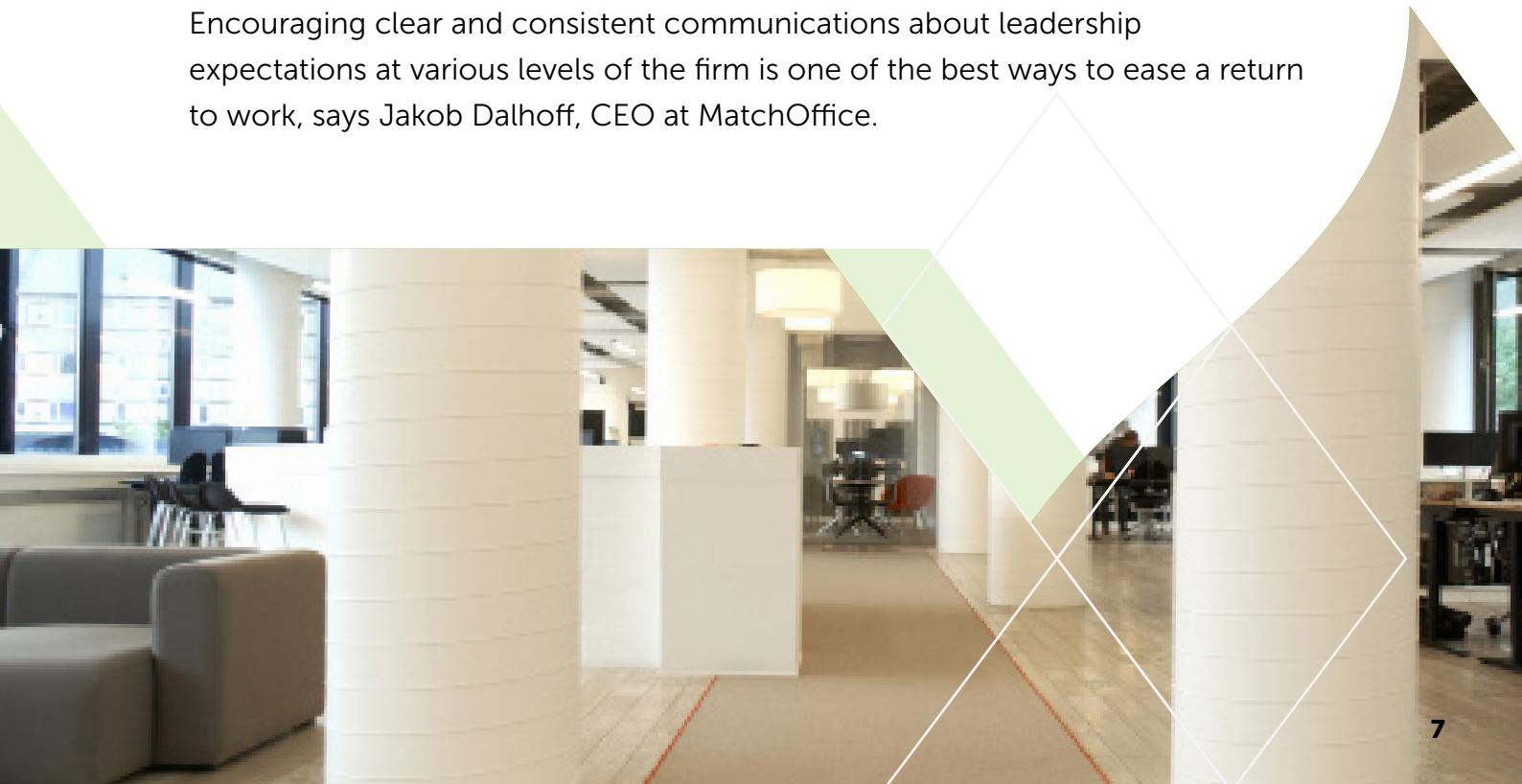
3 . How many people from your firm were using your serviced office?

2021 / 2022



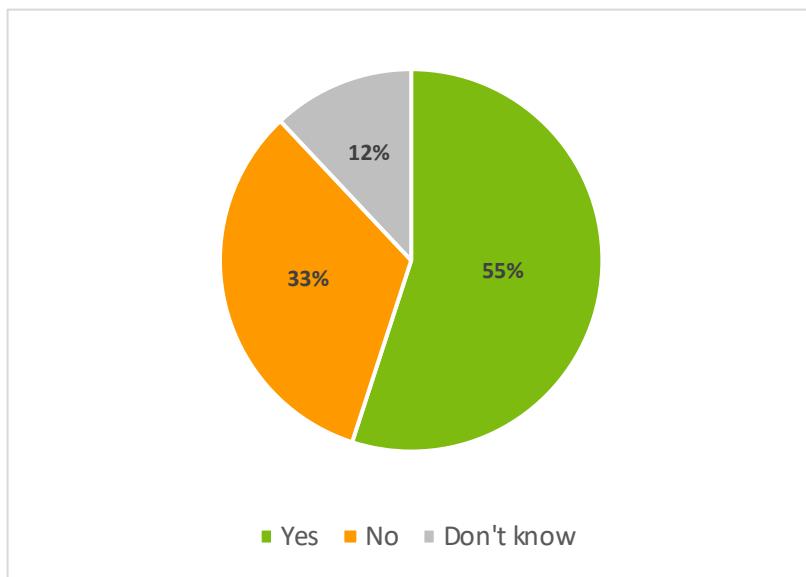
Comparing to last year's results, our respondents started using their serviced offices in bigger teams (mostly teams of 3-4 people vs. 1-2 people in 2021). Because of hybrid work, employees may be at the office only several times per week, which leads businesses to consider the best and most cost-effective use of the space.

Encouraging clear and consistent communications about leadership expectations at various levels of the firm is one of the best ways to ease a return to work, says Jakob Dalhoff, CEO at MatchOffice.

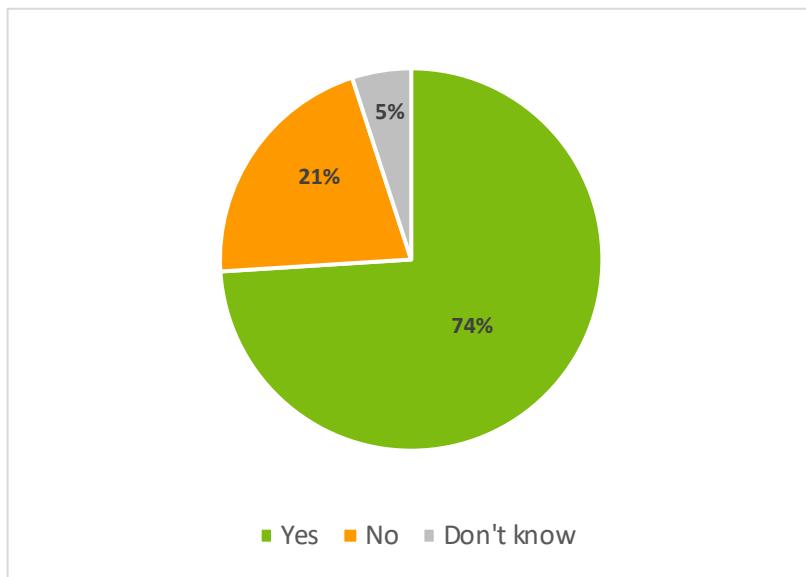


4 . Do you plan to renew your contract?

2021



2022

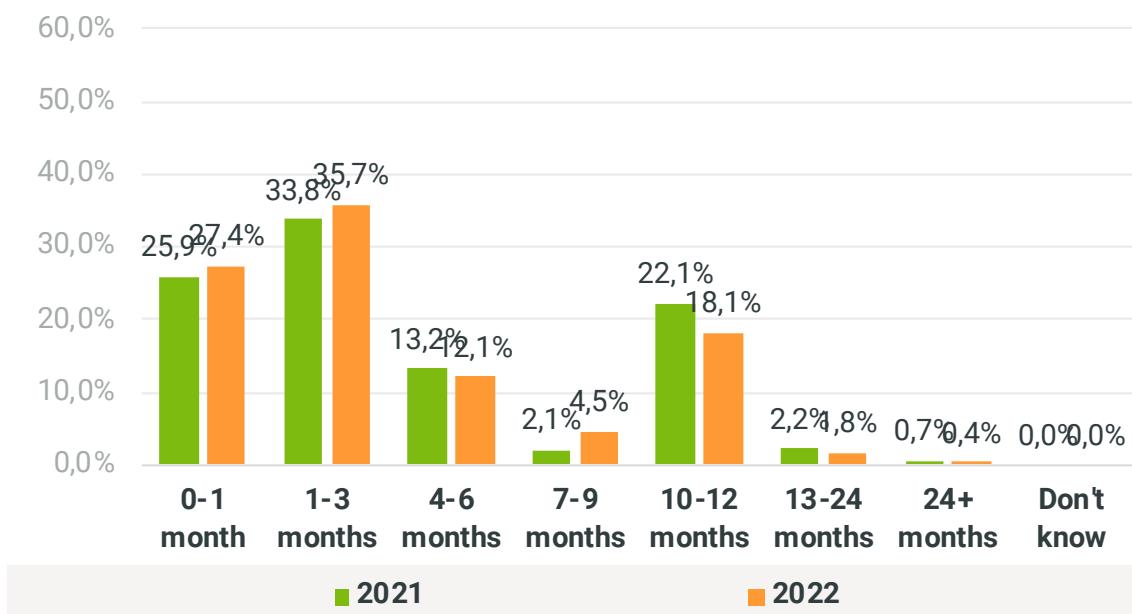


This year, we can see an increase in the share of respondents, who are planning to renew their contract. After two years of working mostly from home, a lot of professionals are hungry for the networking opportunities, provided by their serviced offices.

Flexible office settings are developing workplaces that improve staff members' experiences of a secure and enjoyable work environment. Working on-site can promote teamwork and is essential for many professions. The best amenities may vary from workspace to workspace, but they are crucial for attracting and retaining top staff.

5 . What length of contract did you sign?

2021 / 2022



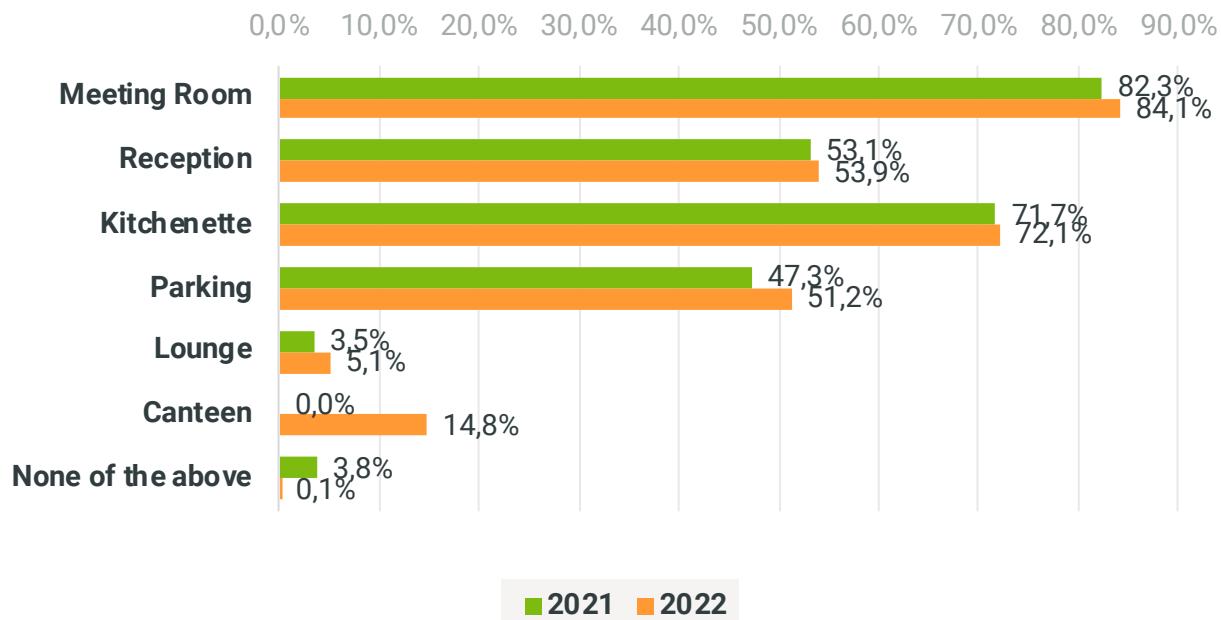
Like in 2021, most of the surveyed clients selected the most flexible options: 0-1 month and 1-3 month contracts. There has been a 4%-point decrease in the share of clients opting for 10-12 month contracts. Given the overall uncertainty of the circumstances, clients want the most flexibility they can get.

As businesses adopt hybrid work arrangements and as new patterns of space use emerge, flexible space solutions will undoubtedly play a significant role in their real estate plans.



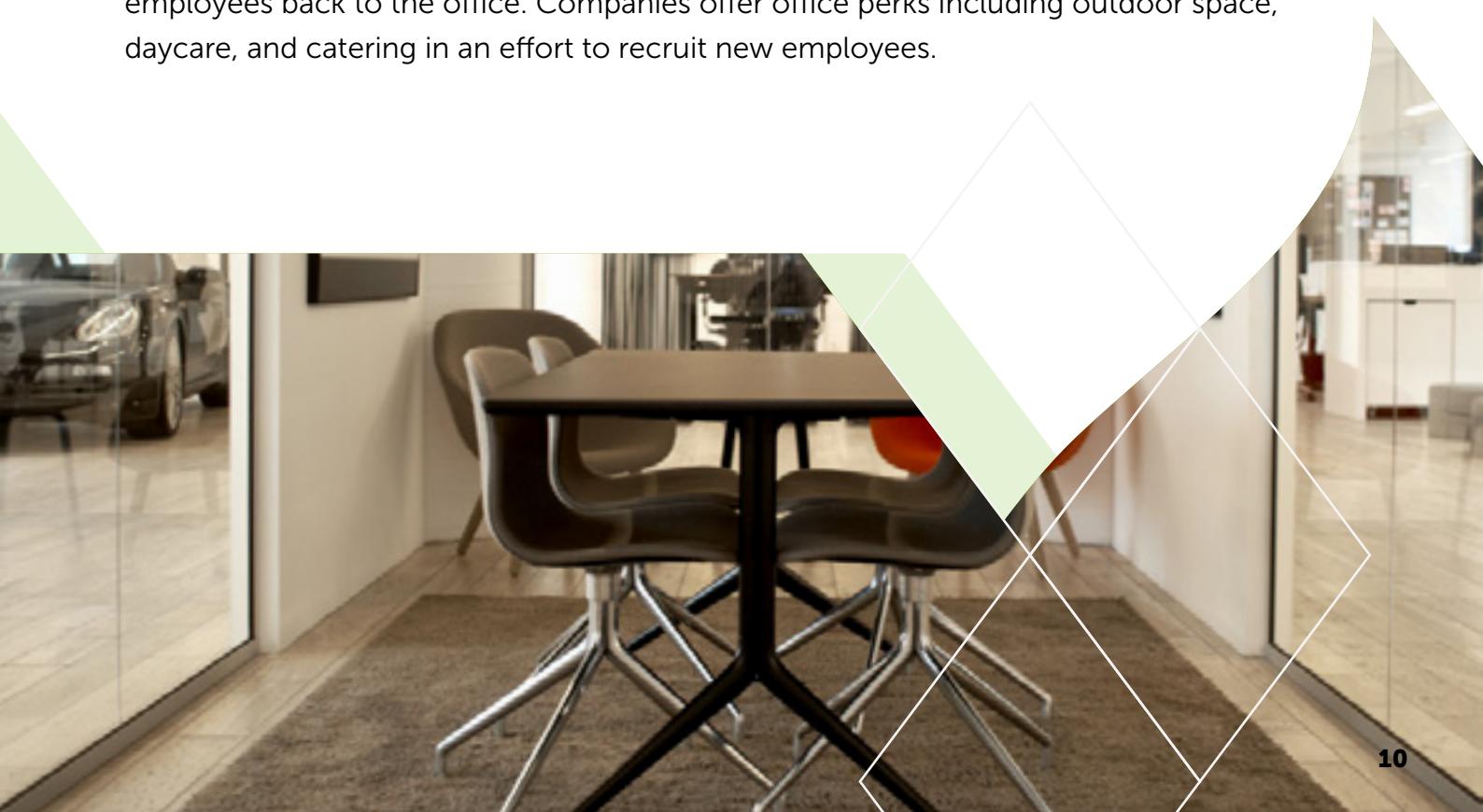
6 . Which of your office's facilities do you use?

2021 / 2022



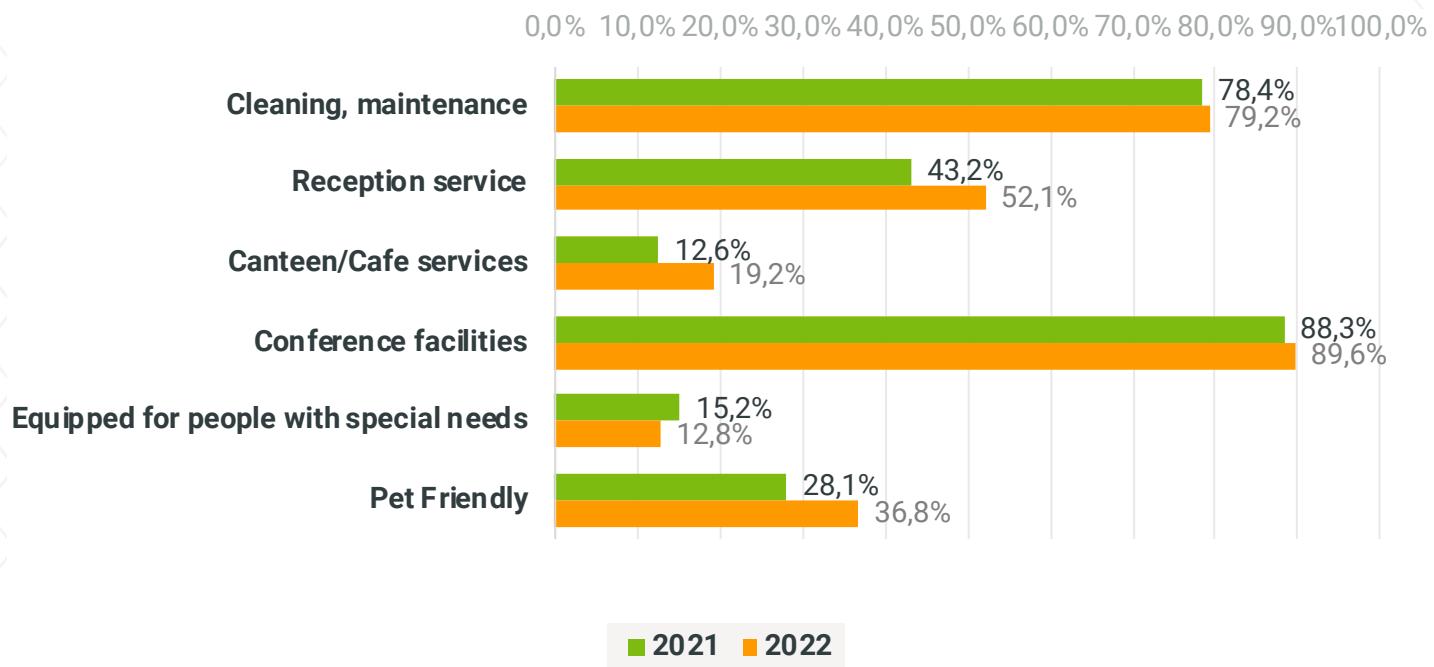
The most popular service among clients over the course of the two past years has been renting out conference rooms, either alone or as part of a virtual office package. 53.9% were using the reception service, 72.1% made use of the kitchenette. The share of respondents using parking grew by 3.9%-points. We can spot a considerable rise among those, using the canteen at their office, this year it's 14.8%.

Various amenities, offered by serviced offices are one of the key factors, that draw employees back to the office. Companies offer office perks including outdoor space, daycare, and catering in an effort to recruit new employees.



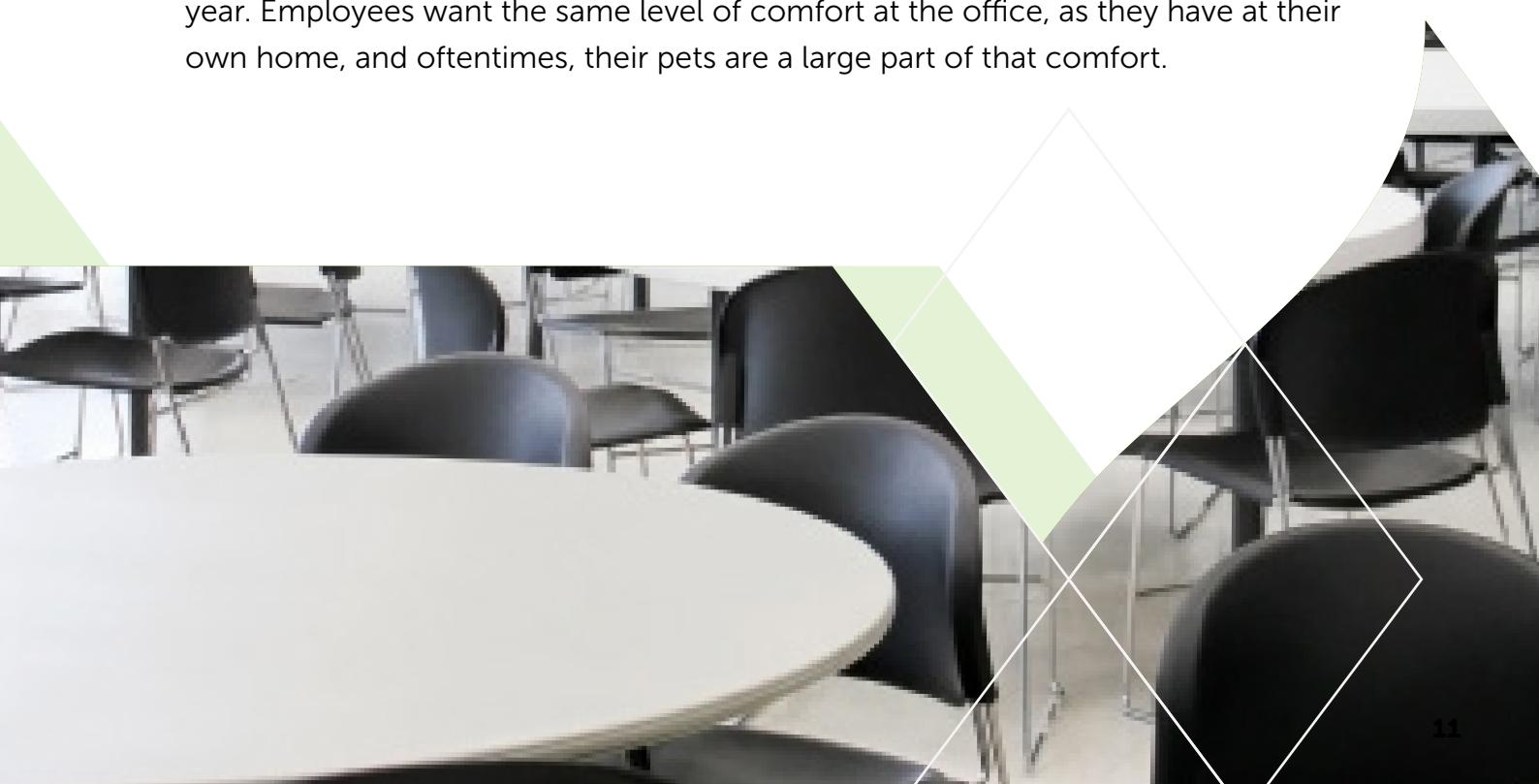
7 . Which services are the most important to you?

2021 / 2022



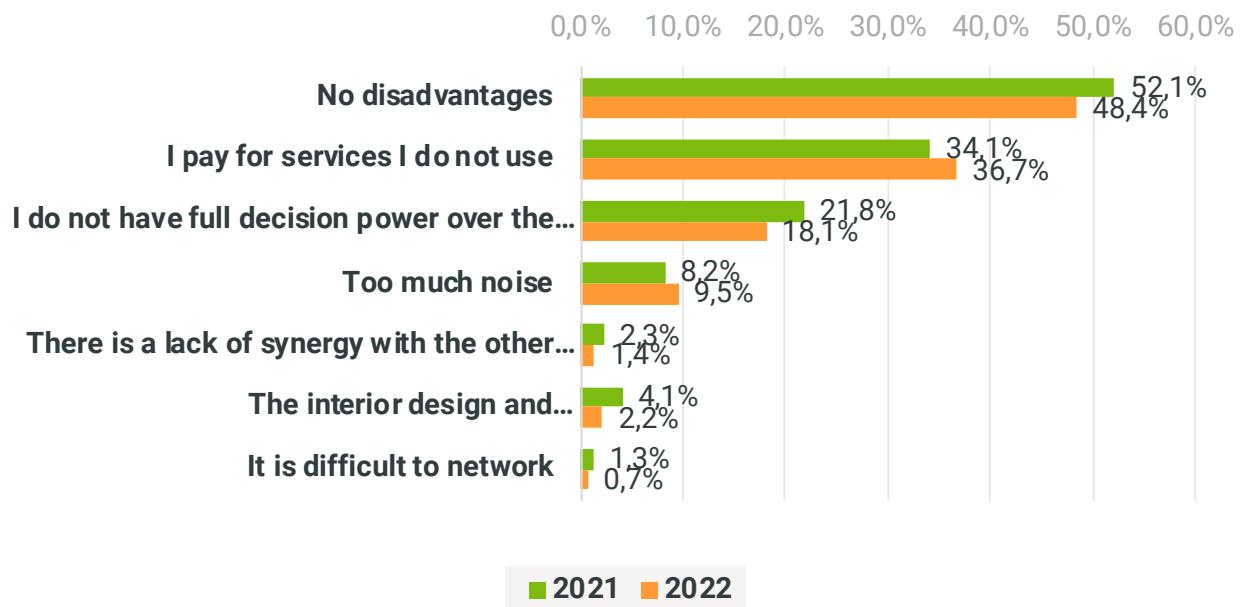
We can see the similar tendencies as in 2021 if we look at the services that our clients thought were most important this year. Users prioritized conference facilities (chosen by 89.6%), cleaning and maintenance services (chosen by 79.2%), and reception services (chosen by 52.1%) in that order. The percentage of respondents who think café services are most important has increased by 6.6%-points. Nearly the same percentage of individuals still prefer workspaces that are accessible to those with special needs.

Unsurprisingly, pet-friendly workspaces were the top pick for 36.8% of users this year. Employees want the same level of comfort at the office, as they have at their own home, and oftentimes, their pets are a large part of that comfort.



8. What are the disadvantages of serviced offices?

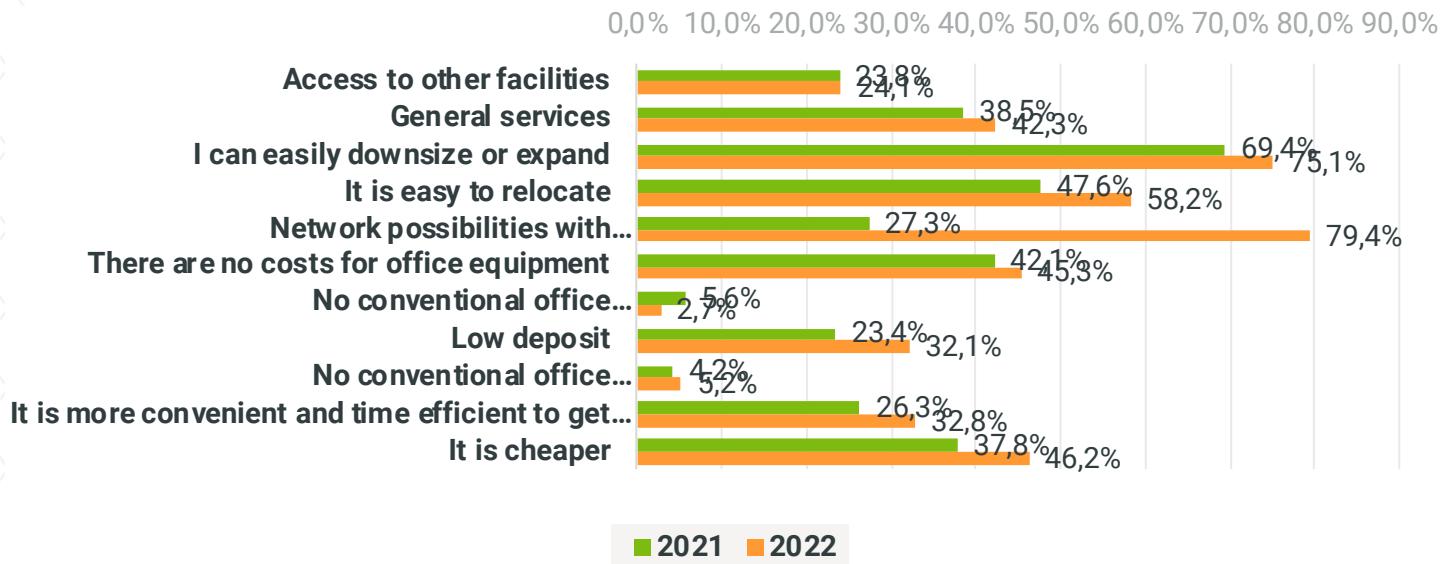
2021 / 2022



48.4% of our respondents, down 3.7%-points from last year, believe that serviced offices have no downsides. 36.7% of clients believe they pay for services they never use. 18.1% of users — a 2.9%-point decrease from the previous year — do not like the fact that they do not have complete decision-making authority over the area. 9.5% of respondents, or about the same as last year, said that serviced offices are excessively noisy. Only 1.4% of employees feel that there is a lack of synergy at a serviced office, and 0.7% believe that networking is challenging. 2.2% believe that the surroundings and interior decor do not reflect their personal taste.

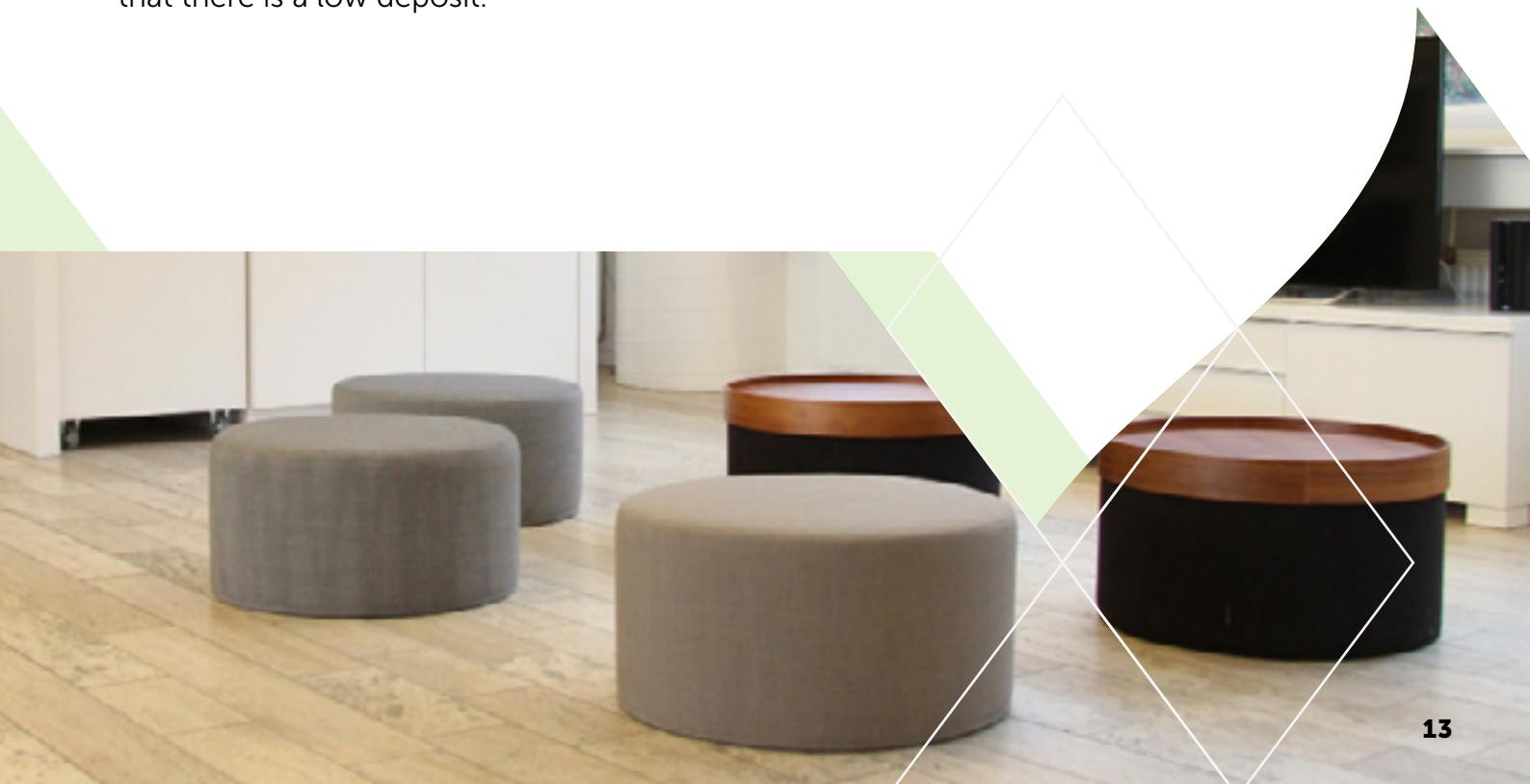
9 . What made you choose a serviced office over a traditional one?

2021 / 2022



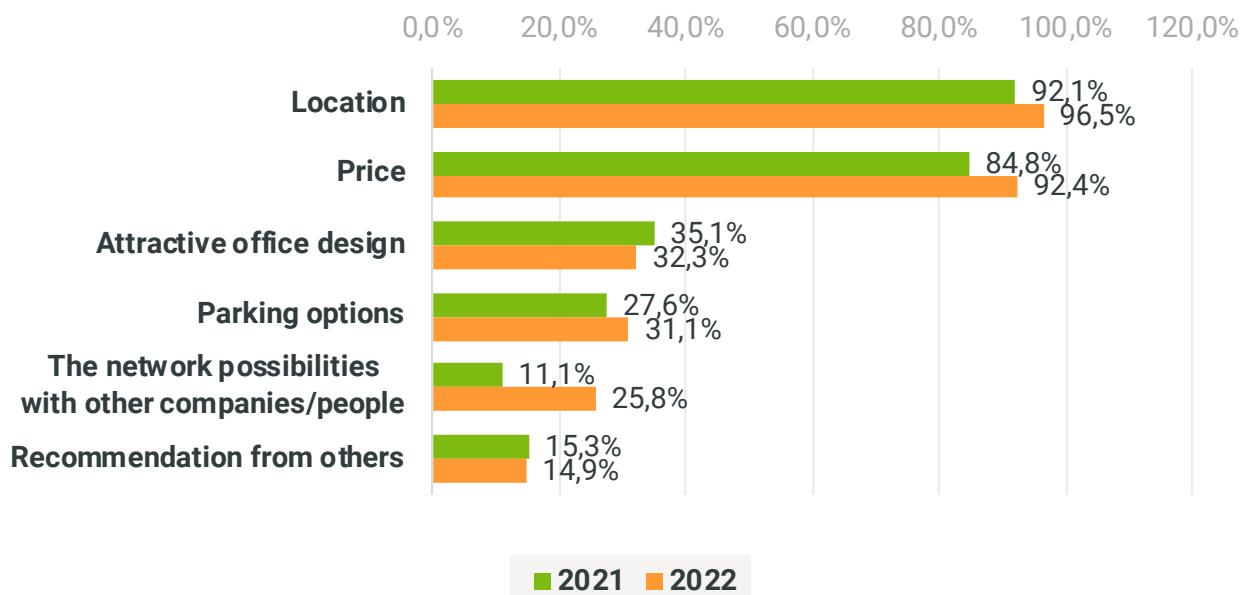
■ 2021 ■ 2022

The majority of our respondents pointed out that they value networking possibilities with likeminded professionals at the workspace they currently occupy. 75.1% like that they can downsize or expand their workspace if necessary. 58.2% think that it's easy to relocate from one place to another. 46.2% like the fact that the using a serviced office is cheaper. 45.3% enjoy that there are no costs for office equipment. 42.3% of respondents love to make use of the general services provided at a flex office. 32.8% of respondents believe, that using a serviced office is more convenient and time efficient. Another 32.15 like that there is a low deposit.



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

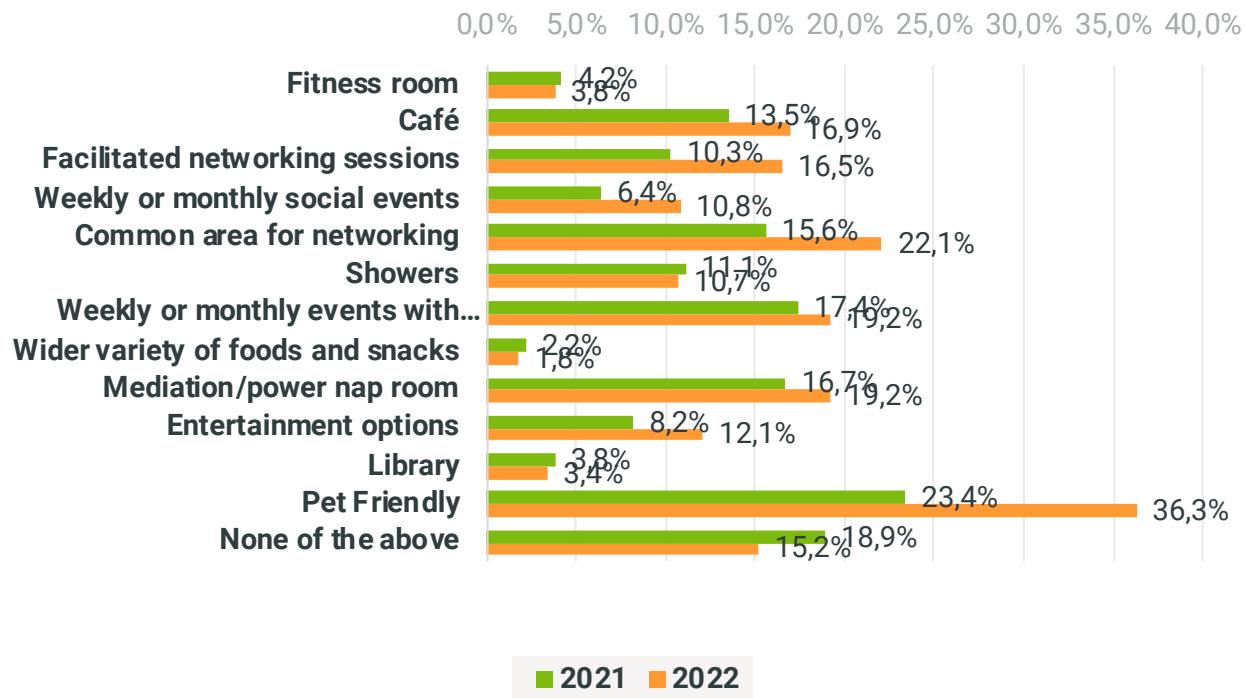
2021 / 2022



The majority of clients select a serviced office based on the location after comparing the results of our client survey year over year. In 2021, 96.5% of our respondents said that location played a role in their decision to work there. The second most common factor influencing the selection of a serviced office is price. The percentage of customers who made their choice solely on price increased by 7.6%-points this year. 32.3% of respondents choose their workplace due to the appealing office layout. 31.1% of respondents chose a place of employment that is close to convenient parking choices. 14.9% of our respondents—0.4%-points less than in 2021 — said they choose their serviced office as a result of recommendations from others. Finally, 25.8% of clients joined a place with networking opportunities and professionals who shared their interests.

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

2021 / 2022

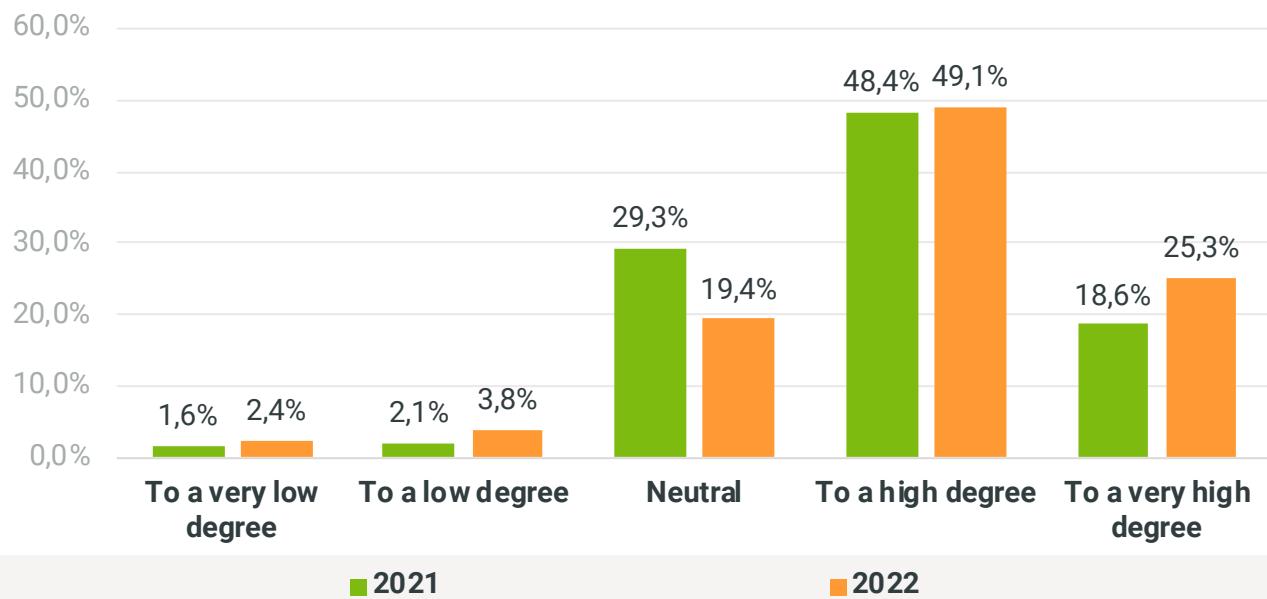


This year, 36.3% of respondents said that having a pet-friendly serviced office would boost its worth. 22.1% of clients said that they would like to have a common area for networking. 19.2% of those surveyed said they would value weekly or monthly skill-upgrading events with specialists. Another 19.2% of workers would appreciate having quiet spaces for meditation or power naps at work. 16.5% of respondents cited networking opportunities as a benefit of their office. 16.9% of respondents would also like to see a café there.

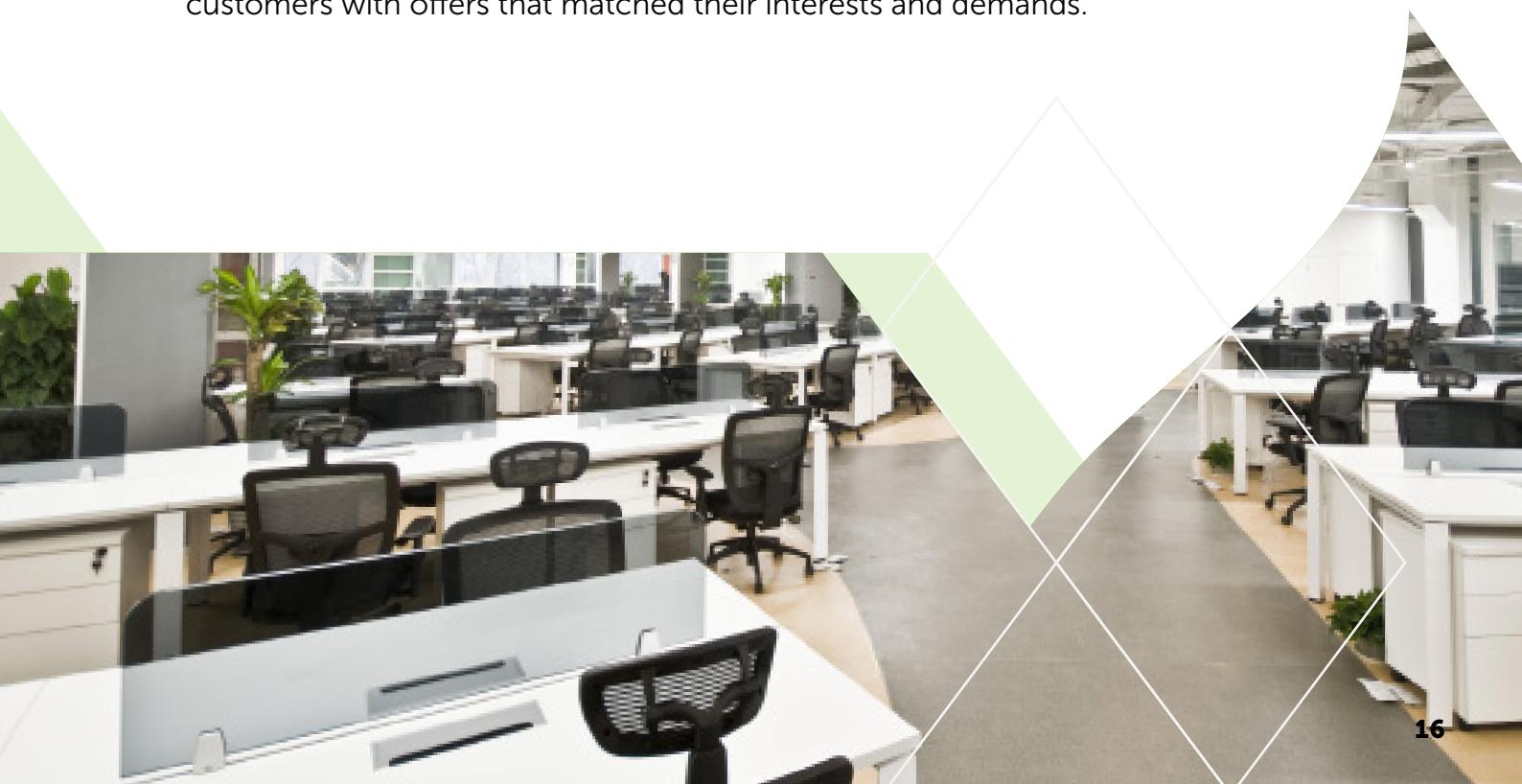


12 . How well does your serviced office meet your expectations?

2021 / 2022



Similarly to the last year's results, the majority of our respondents – 49.1% – are extremely satisfied with their serviced office. This year, 6.7%-points more feel that their serviced office meets their demands in a very high degree than they did previous year. Only 3.8% and 2.4% of respondents said their serviced office met their expectations to a very low degree, respectively. These findings show that this year's satisfaction levels are higher than those from 2021. It appears that business owners were able to identify the key industry trends and supply customers with offers that matched their interests and demands.



About MatchOffice

MatchOffice is one of Europe's leading commercial real estate brokers, cooperating with flexible workspaces since 2004. Almost 13,000 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

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[Industry Survey 2022](#)

[Industry Survey 2021](#)



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