


# CLIENT SURVEY

2023



## MatchOffice presents the annual Client Survey 2023

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 delighted to announce the outcomes of our ninth annual Client Survey for the year 2023. The objective of this research is to gauge client satisfaction with their current workspace, discern the aspects they value most, and explore the latest market trends through the perspective of European serviced office clients.

In 2023, we observed trends from previous years persisting, but with the notable shift of more clients returning to the office. With hybrid working on the rise, tenants seek the flexibility serviced offices can provide. In addition, we solicited opinions from service providers regarding their insights on the market, and you can access the findings in the MatchOffice Industry Survey for 2023.

Examining the forthcoming challenges that the serviced office market might encounter, factoring in evolving work patterns and external influences, is indeed fascinating. We are undeniably embarking on a fresh phase of progress within this industry. We invite you to read this year's report with the aspiration that you find it useful and enlightening



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# Key Results

Our findings.

## **Hybrid work is on the rise**

Since full-time remote work isn't suitable for everyone or every company, workspaces are adapting to accommodate this trend. More individuals are now spending a maximum of three days a week in the office, thus, workspaces are becoming more dynamic, and common areas are taking on a more prominent role as methods of communication and collaboration evolve. Employees are reimagining the office as a place that offers more than what can be accomplished at home, making flexible-layout serviced offices increasingly popular.

## **High demand for flexibility**

Serviced offices offer the flexibility of short-term contracts, sparing clients from long commitments that lock them in for a decade or more, allowing the freedom to adapt their workspace as required. As the company's size fluctuates, there is liberty to adjust the amount of rented space. This agility allows the workspace office to accurately mirror the tenants' needs. If requirements change, there is flexibility to modify your workspace.

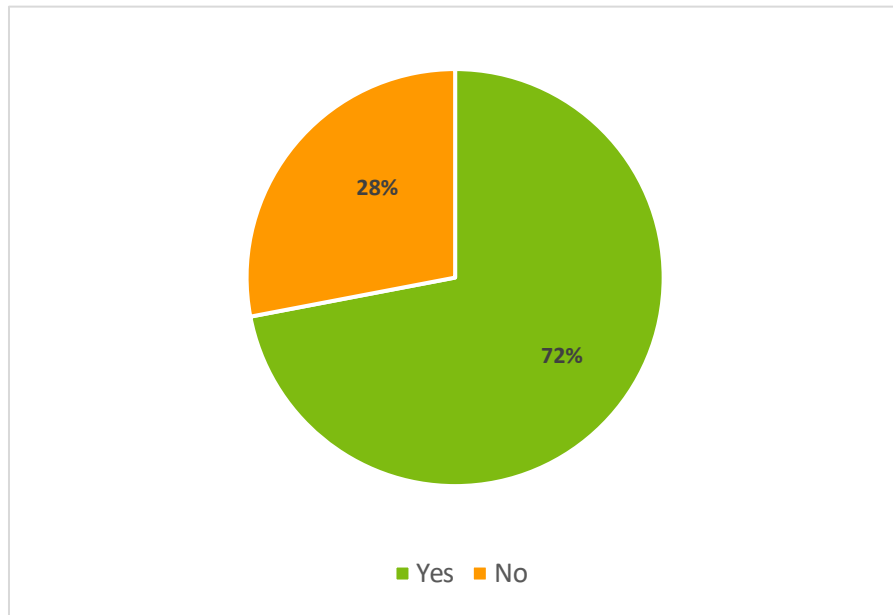
## **Bigger teams are back to the office**

According to our survey, there is a steady tendency of bigger teams returning to their offices. In the broader context, there's an expectation that employees will increasingly embrace flexible office arrangements in the years to come. While the future of work may undergo a transformation, serviced offices continue to offer a multitude of advantages that will draw professionals from across the globe.

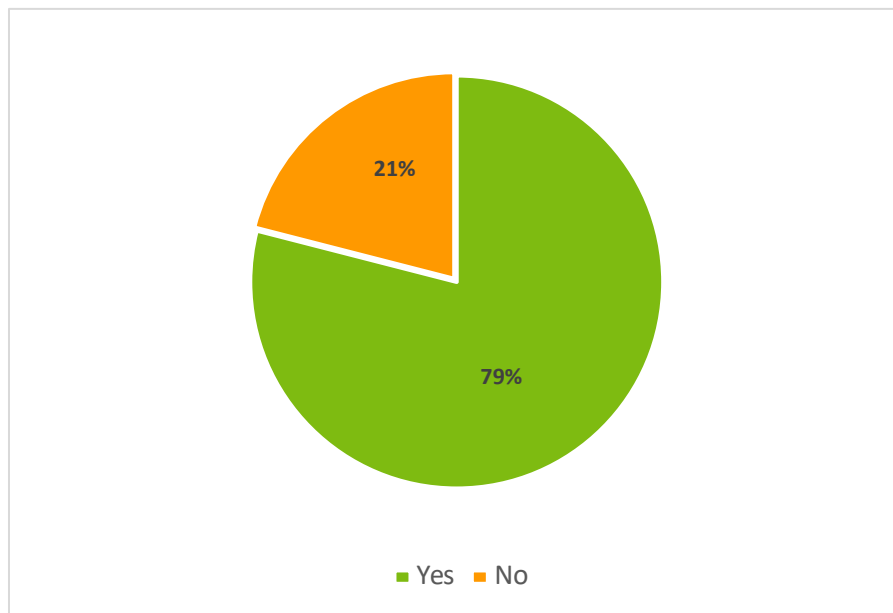


# 1 . Have you ever used a serviced office?

**2022**



**2023**

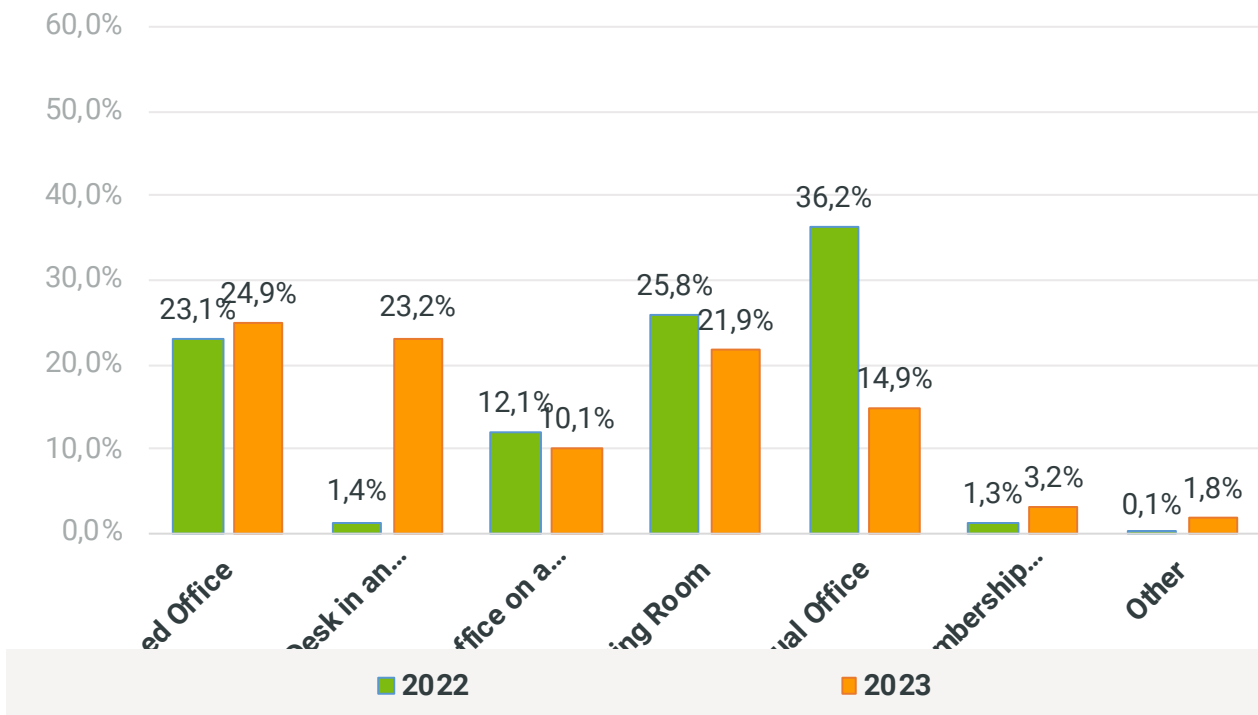


In 2023, we can see, that the percentage of those, using a serviced office has grown to 79% compared to 72% in 2022. As hybrid work models become more prevalent, an increasing number of employees are capitalizing on the networking prospects offered by these workspace arrangements.

As businesses reshape their perception of the office, envisioning it as a place that provides added value compared to what individuals can attain in their homes, there is a growing, unprecedented popularity of serviced offices with adaptable designs.

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

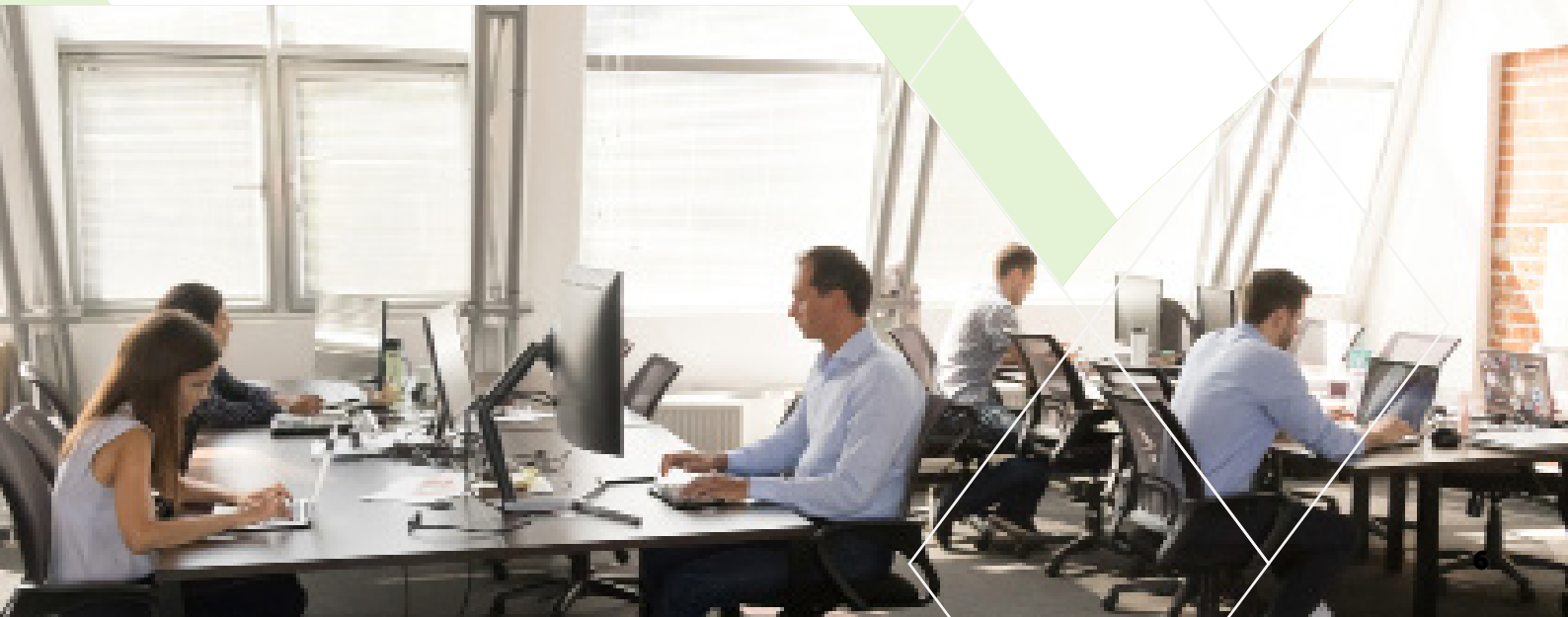
2022 / 2023



In 2023, we can see an increase in the popularity of renting a physical workspace and a drop in the popularity of virtual office, which has been booming during the recent years. There was a 21.8%-points rise among those, renting a desk in an open space, and a 21.3%-points decline among those, renting a virtual office.

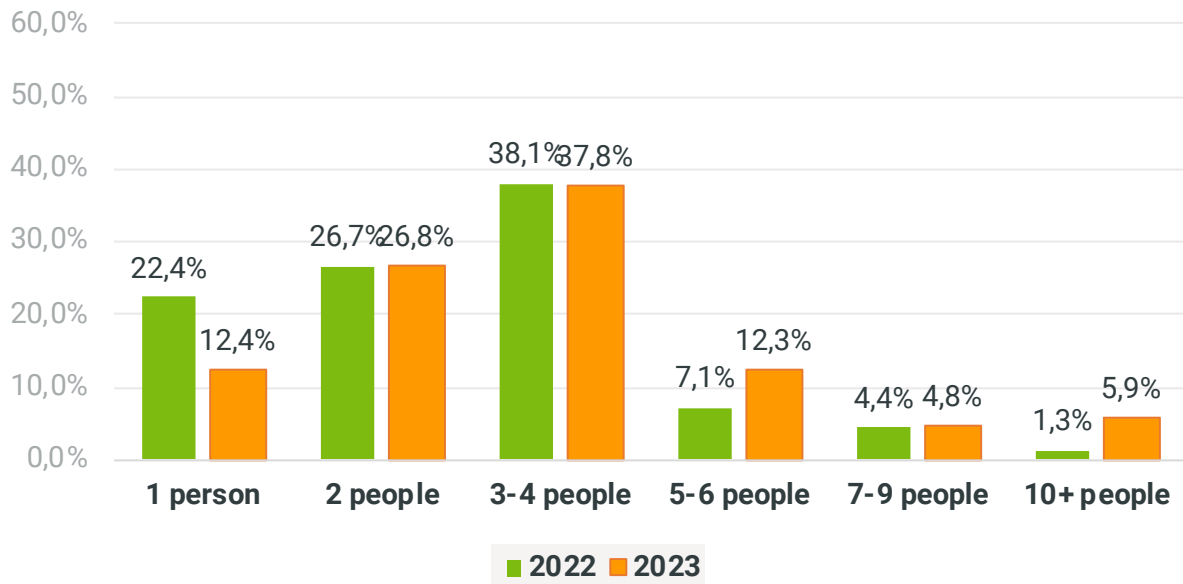
“ Jakob Dalhoff, CEO of MatchOffice, points out:

***We can see a tendency towards people coming back to the office either full-time, or as part of the hybrid model. Flexibility now encompasses the capacity to determine one's work hours, and it extends beyond mere remote work.***



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

2022 / 2023



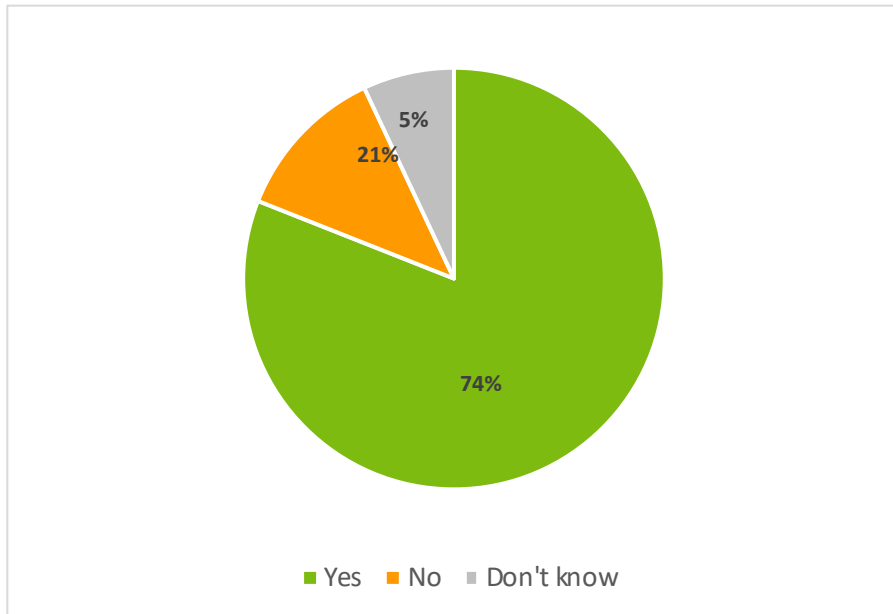
This year, we can spot a 5.2%-points increase in the share of employees going to the office in 5-6 persons. The 3-4 and 2 people bands remained stable. The share of those, going to the office solo, decreased by 10%-points. We can also spot a rise of 4.6%-points among those, going to the office with 10+ colleagues.

Fostering transparent and uniform communication regarding leadership expectations at different organizational levels represents an effective strategy for facilitating a smooth return to the workplace, says Jakob Dalhoff, CEO at MatchOffice.

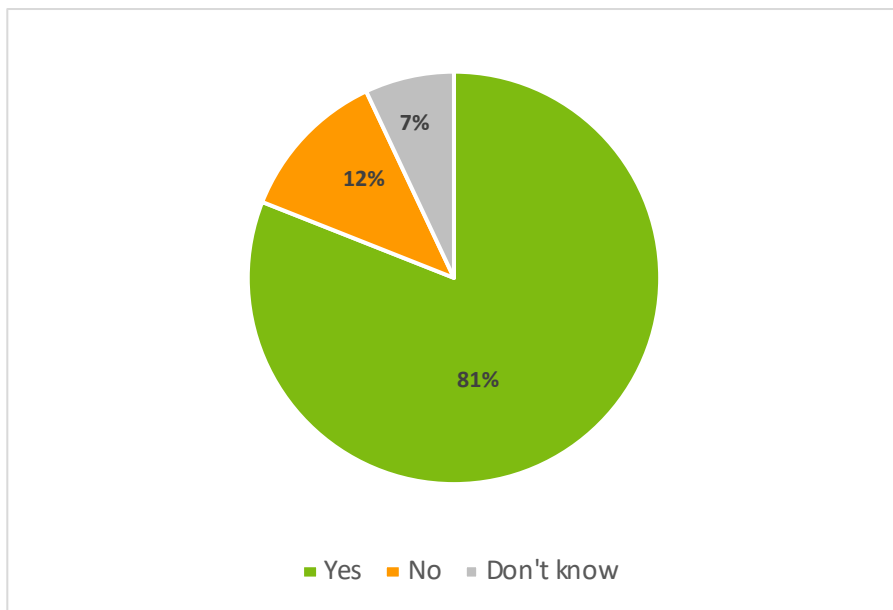


## 4 . Do you plan to renew your contract?

**2022**



**2023**



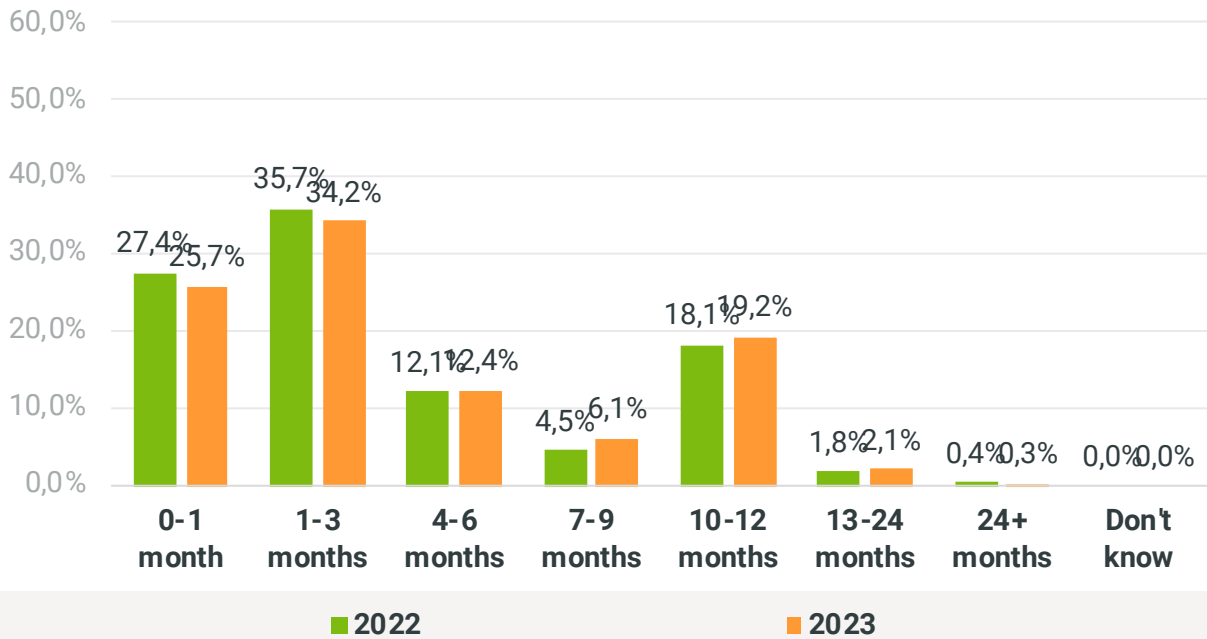
In 2023, there's a noticeable uptick in the percentage of respondents looking to extend their contracts. With the growing tendency of employees returning back to the office, many professionals are eager to embrace the networking possibilities facilitated by their serviced workspaces. Being present at the office can foster collaboration, and it remains a necessity for numerous occupations.

In the era of hybrid work, traditional offices, which used to be quite uniform, are undergoing a transformation. A high-quality office setting has become the distinguishing factor that can attract individuals to work for your organization, thus enabling your company to expand and realize its full potential.



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

2022 / 2023

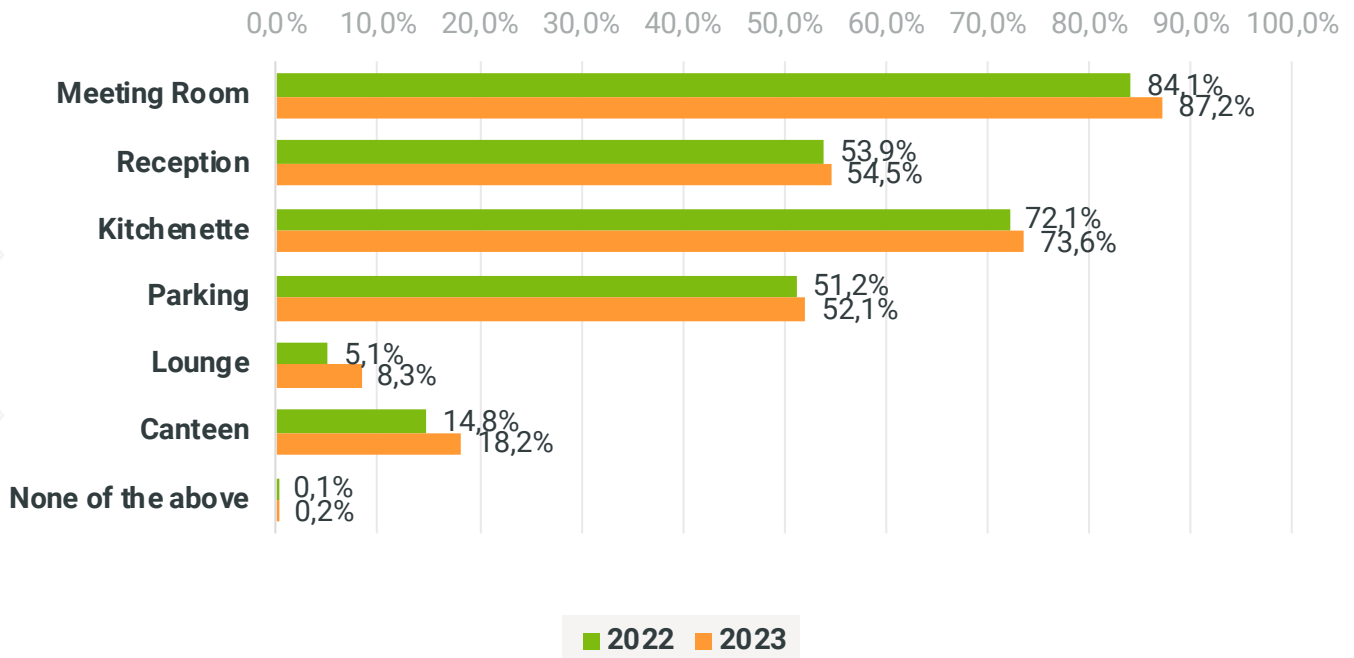


Like in 2022, the majority of the surveyed clients selected the most flexible options: 0-1 month and 1-3 month contracts. Similarly, the share of those, who signed 10-12 months contracts remains stable.

Flexible office contracts continue to dominate on the market. Acquiring a serviced office involves a straightforward monthly financial commitment, simplifying the intricacies of your office lease arrangement.

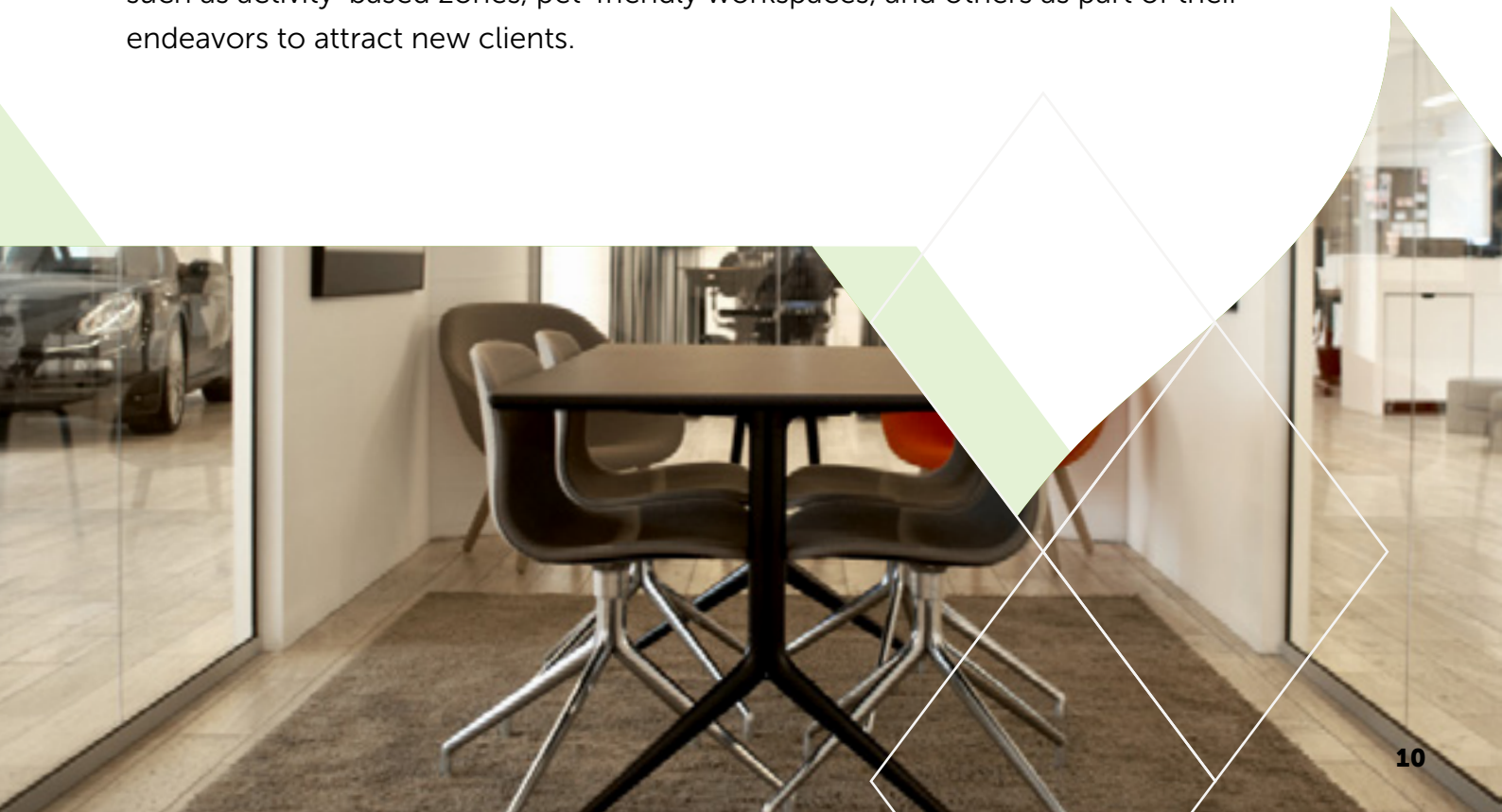
## 6 . Which of your office's facilities do you use?

2022 / 2023



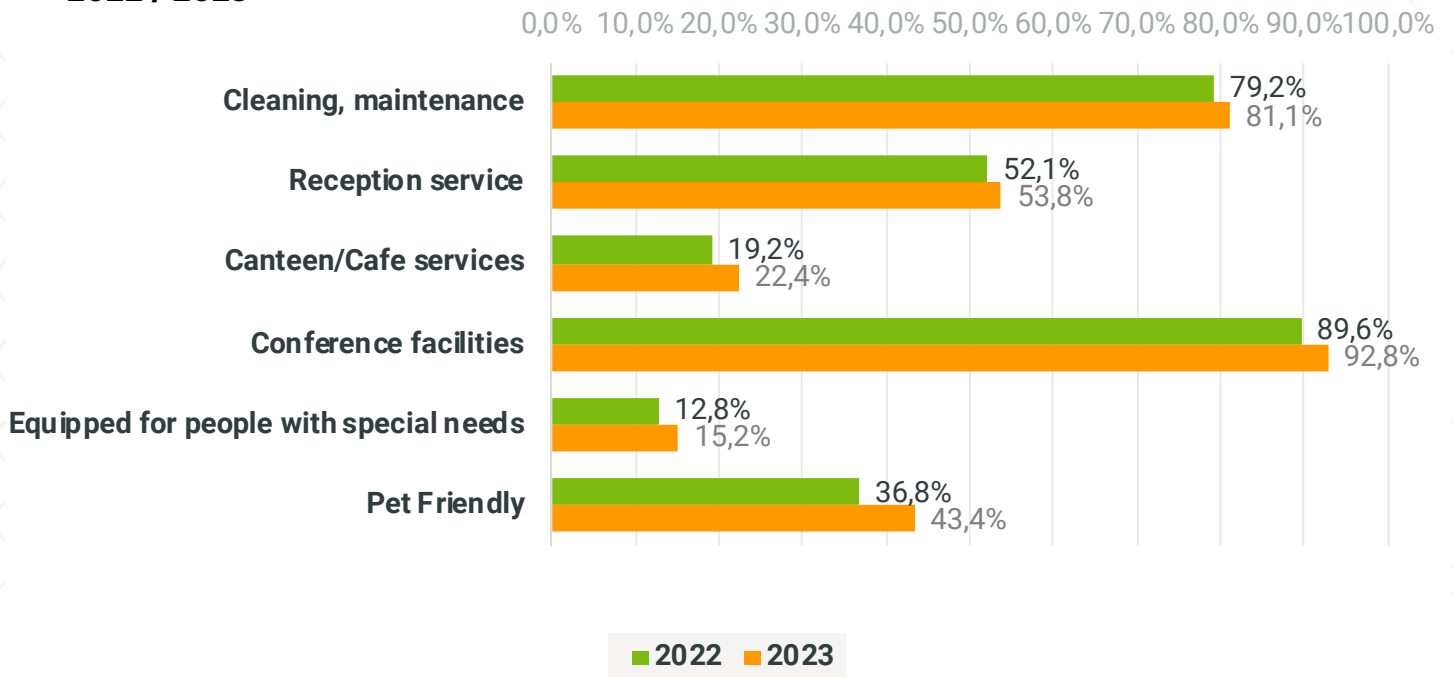
In 2023, we can spot the ongoing popularity of renting meeting rooms. This year, the share of those, using this service, grew by 3.1%-points. 54.5% of respondents made use of the reception service, and 73.6% used the kitchenette. The number of those, using the canteen grew by 3.4%-points.

A multitude of services provided by workspaces stands out as a pivotal factor enticing employees to return to the workplace. Companies are now extending office benefits such as activity-based zones, pet-friendly workspaces, and others as part of their endeavors to attract new clients.



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

2022 / 2023

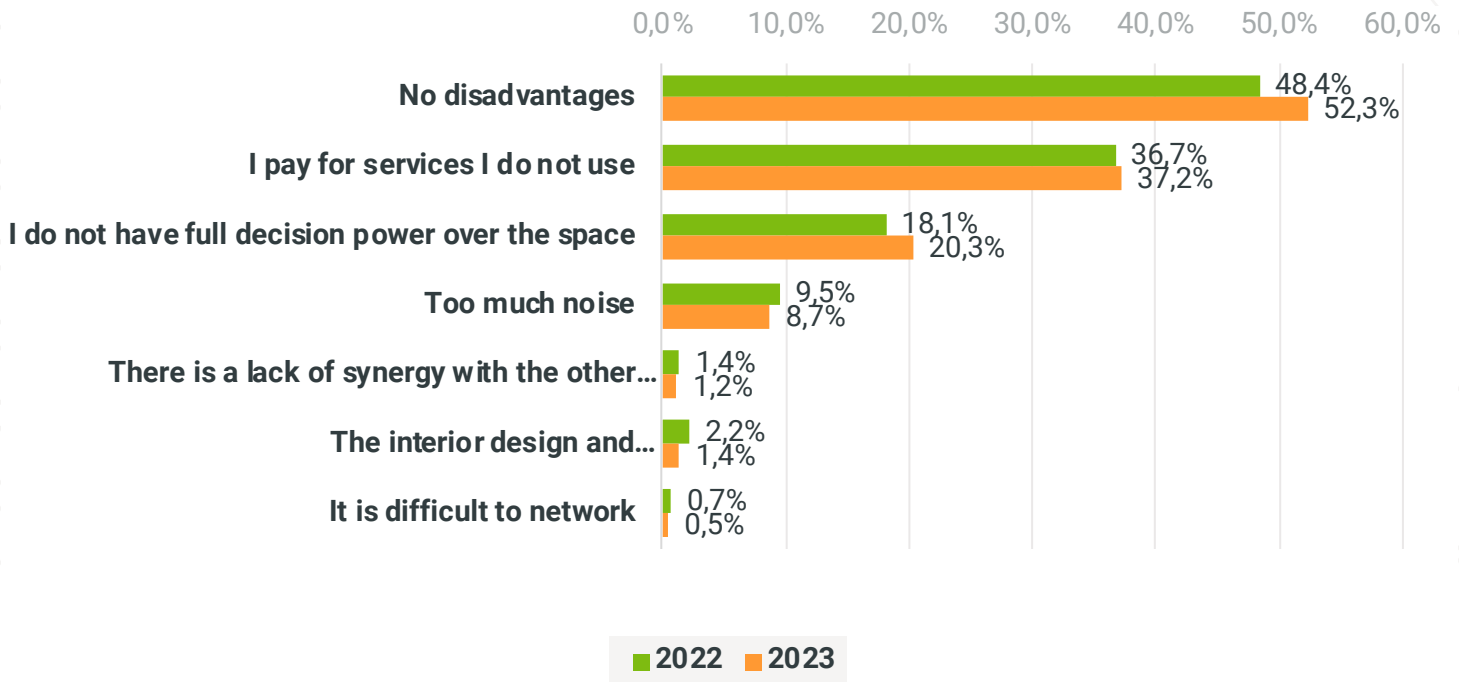


When we examine the services our clients deemed most essential this year, we notice similarities to the trends observed in 2022. Users placed a high emphasis on conference facilities (selected by 92.8%), followed by cleaning and maintenance services (chosen by 81.1%), and reception services (selected by 53.8%). Notably, the importance of café services has risen by 3.2%-points among respondents. Likewise, a nearly equivalent percentage of individuals still prefer workspaces that are inclusive and accessible to those with special needs. Pet-friendly office environments were the preferred choice for 43.4% of users in the current year.



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

2022 / 2023

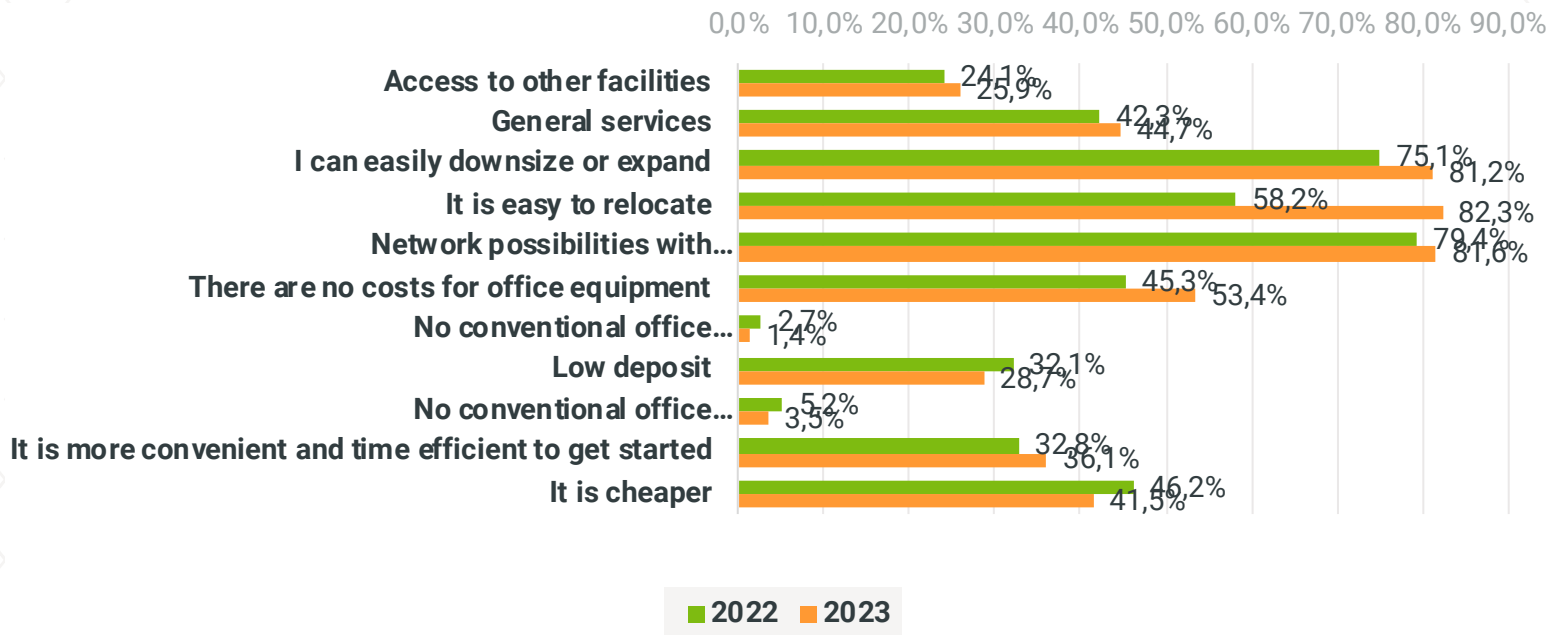


Among our respondents, 52.3%—an increase of 3.9%-points from the previous year—expressed that they see no downsides to serviced offices. Meanwhile, 37.2% of clients believe they are paying for services they rarely use. For 20.3% of users, a 2.2 percentage point increase from the prior year, their primary concern is the lack of complete decision-making authority over the workspace. 8.7% of respondents, similar to the previous year, find serviced offices to be excessively noisy. A mere 1.2% of employees believe there is a lack of synergy in serviced offices, and 0.5% perceive networking as challenging. Additionally, 1.4% feel that the office’s surroundings and interior decor do not align with their personal taste.

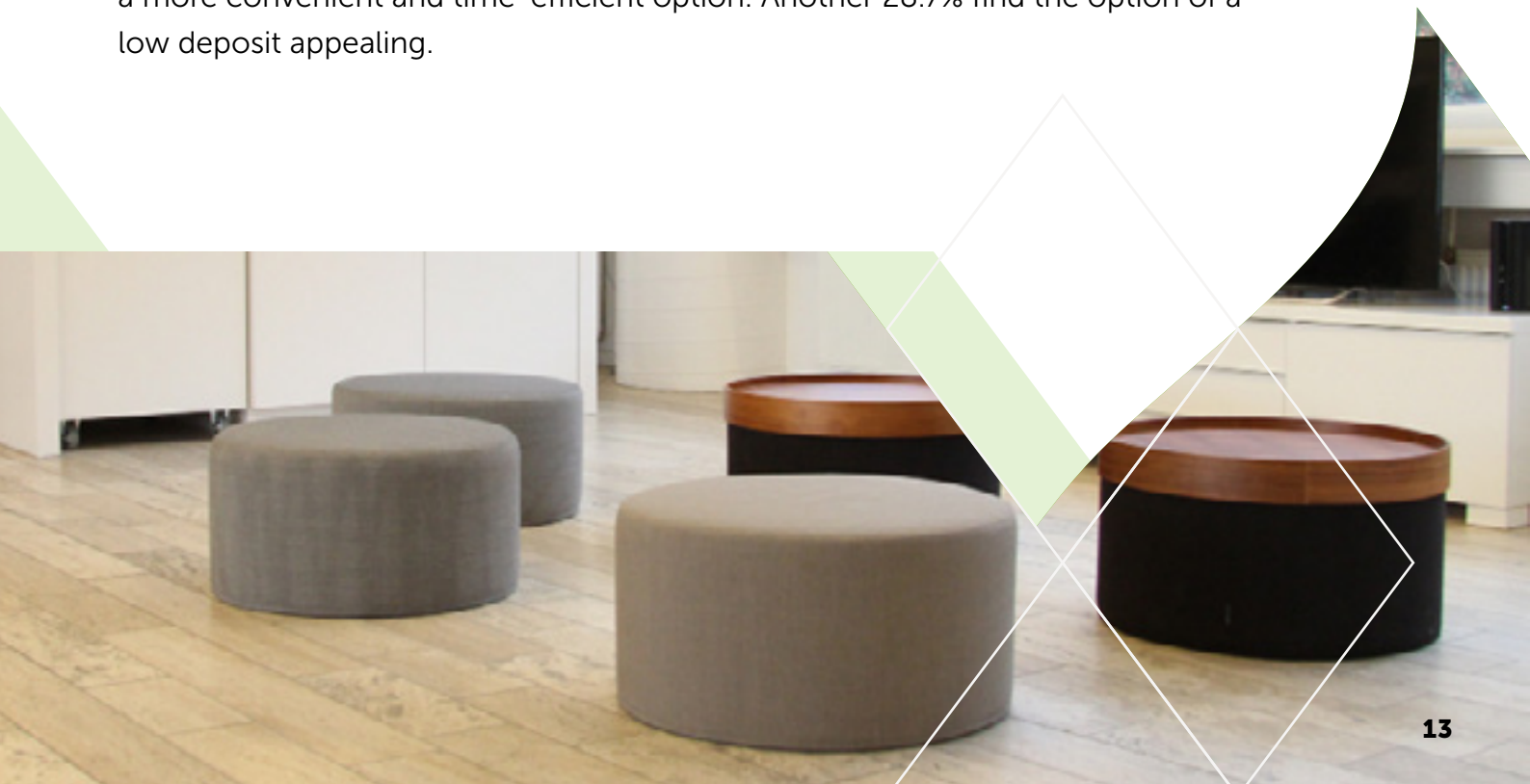


## 9 . What made you choose a serviced office over a traditional one?

2022 / 2023

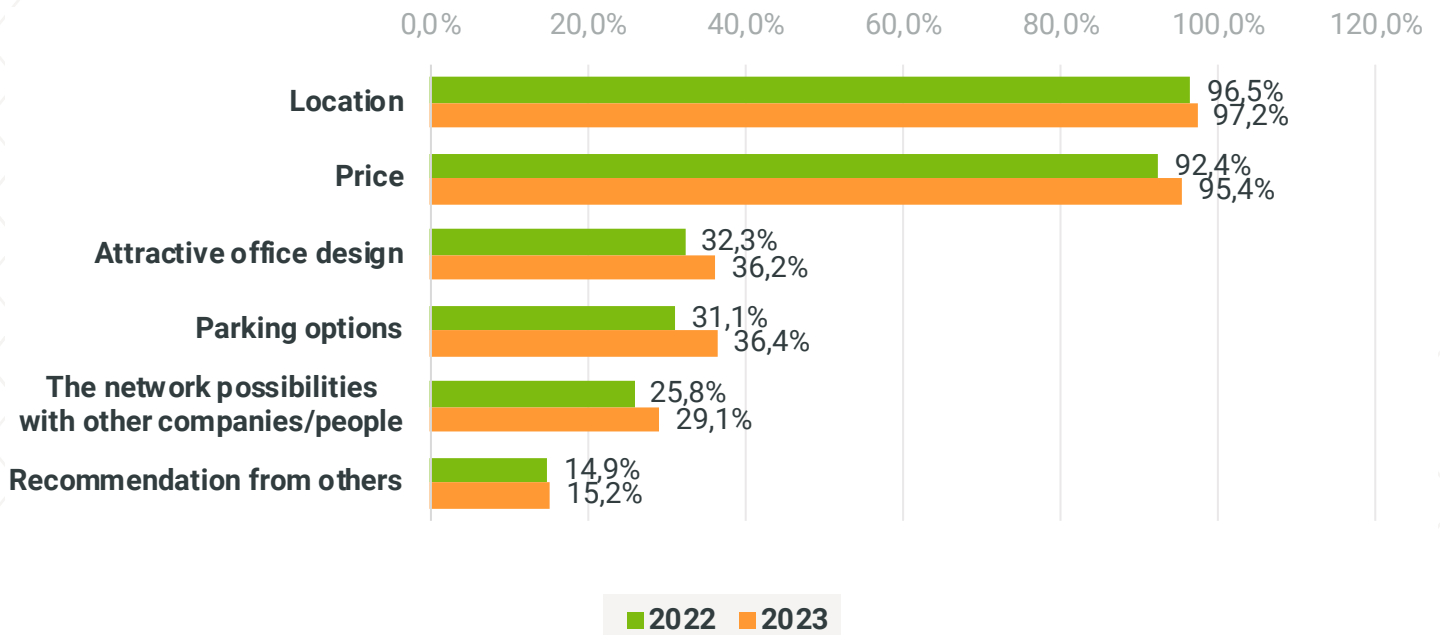


The majority of our survey participants have emphasized their appreciation for the possibility to relocate as needed. Approximately 81.2% find it valuable that they have the flexibility to expand or downsize their workspace. Additionally, 81.6% enjoy networking possibilities with likeminded professionals. About 41.5% appreciate the cost-effectiveness of using a serviced office, while 53.4% enjoy the absence of expenses related to office equipment. Furthermore, 44.7% of respondents derive satisfaction from utilizing the general services offered at a flexible office. A significant 36.1% of participants view using a serviced office as a more convenient and time-efficient option. Another 28.7% find the option of a low deposit appealing.



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

2022 / 2023

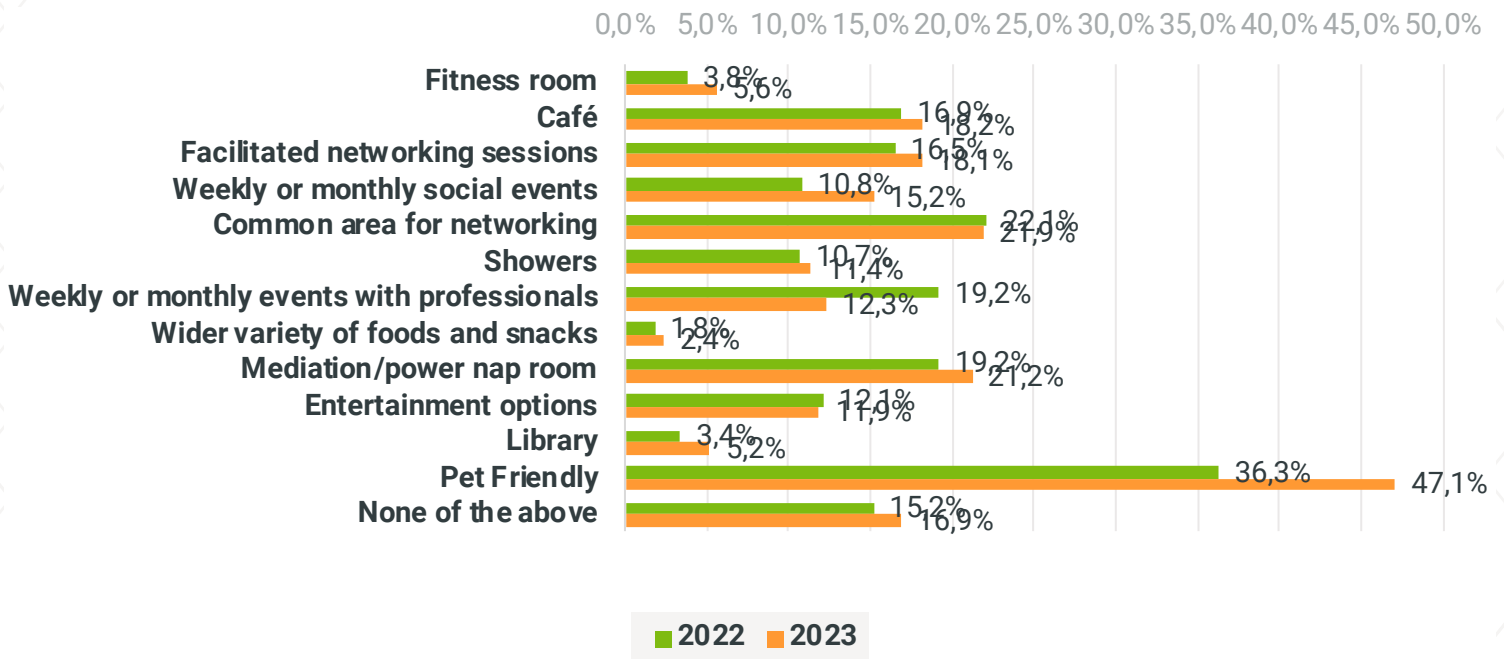


Comparing the results of our annual client survey, it becomes evident that the majority of clients prioritize the location when selecting a serviced office. In 2023, a significant 97.2% of respondents indicated that location played a role in their decision. The second most common factor influencing their choice is the price, with an increase of 3%-points this year in clients selecting solely based on price. Office layout's appeal is another key consideration for 36.2% of respondents, while 36.4% opt for workplaces with convenient parking options nearby. About 15.2% of our respondents, slightly more than in 2022 by 0.3 percentage points, base their decision on recommendations from others. Lastly, 29.1% of clients prefer serviced offices that offer networking opportunities and a community of professionals who share their interests.

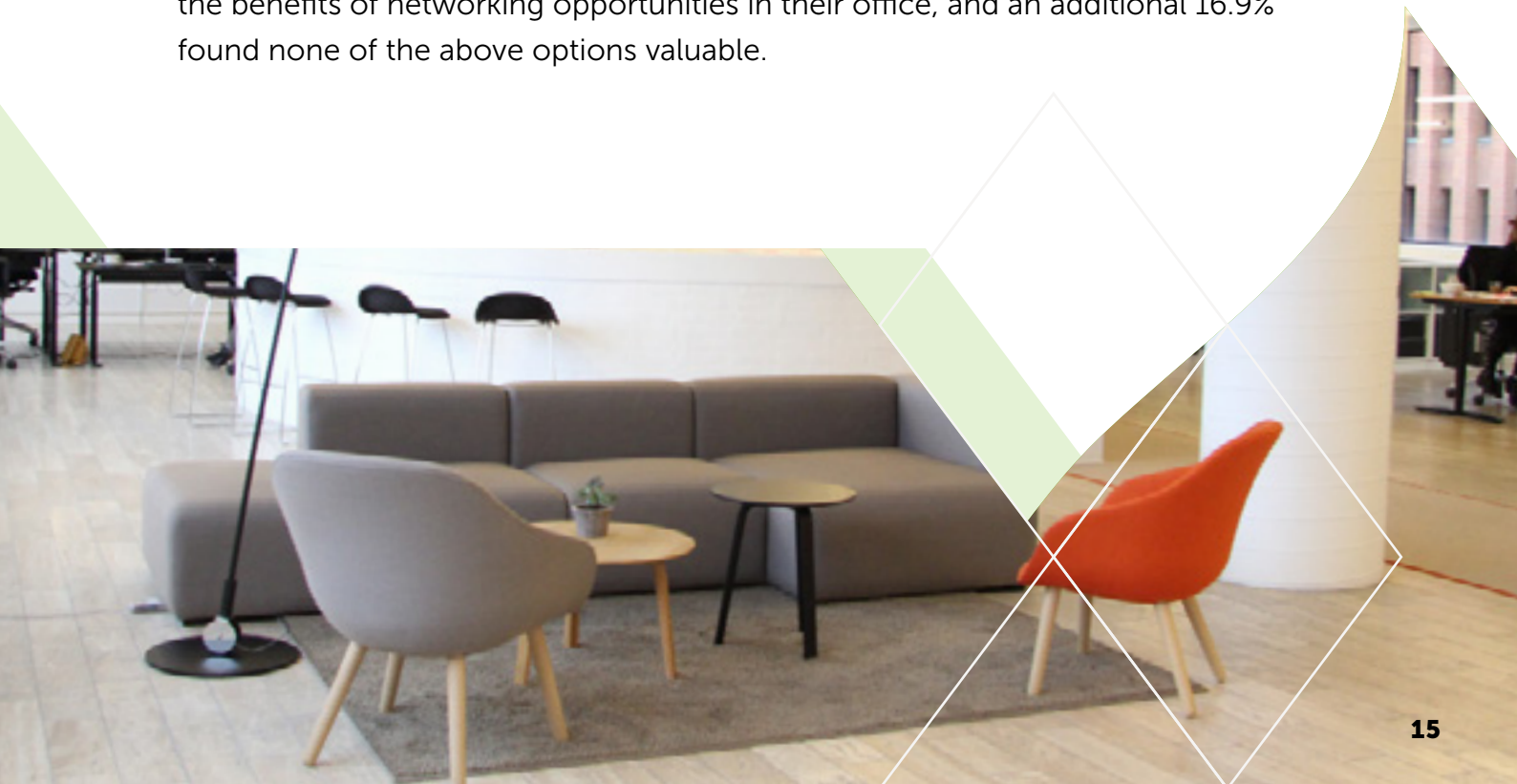


# 11 . What would increase the value of your serviced office?

2022 / 2023

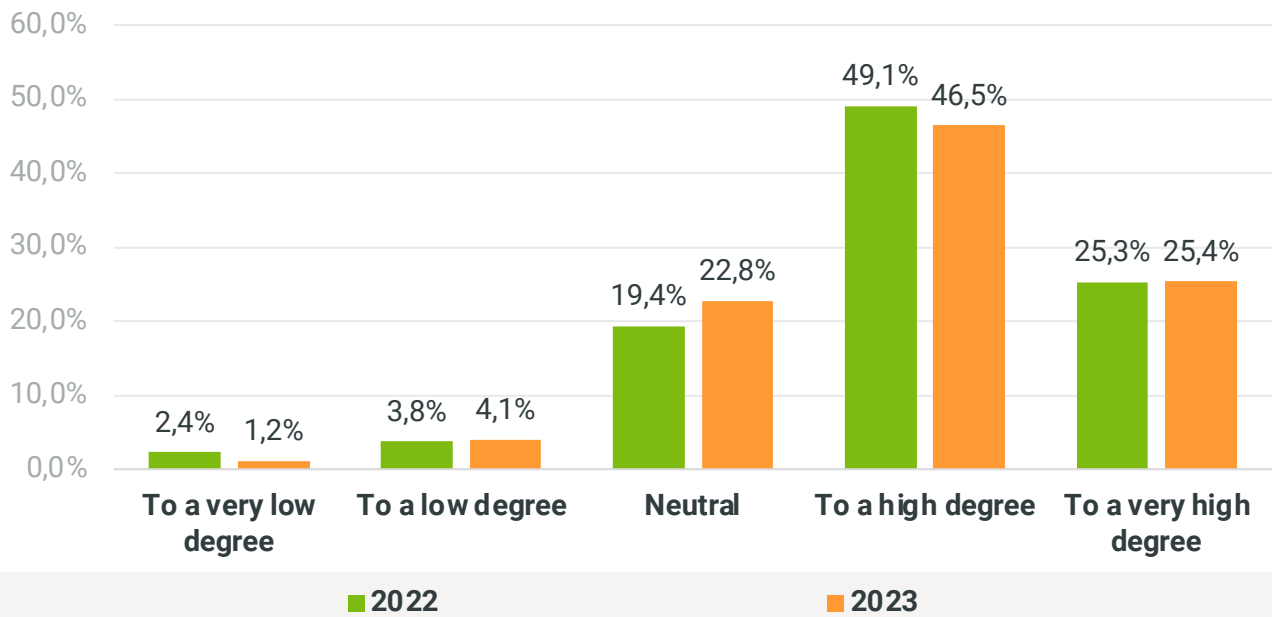


In the current year, 47.1% of respondents expressed the view that the feature of a pet-friendly serviced office would enhance its appeal. Additionally, 21.9% of clients expressed a desire for a communal area dedicated to networking. For 12.3% of those surveyed, the value lies in access to skill-enhancement events led by specialists, either on a weekly or monthly basis. An equal 21.2% of workers emphasized the importance of having serene spaces for meditation or power naps within the workplace. Furthermore, 18.1% of respondents acknowledged the benefits of networking opportunities in their office, and an additional 16.9% found none of the above options valuable.

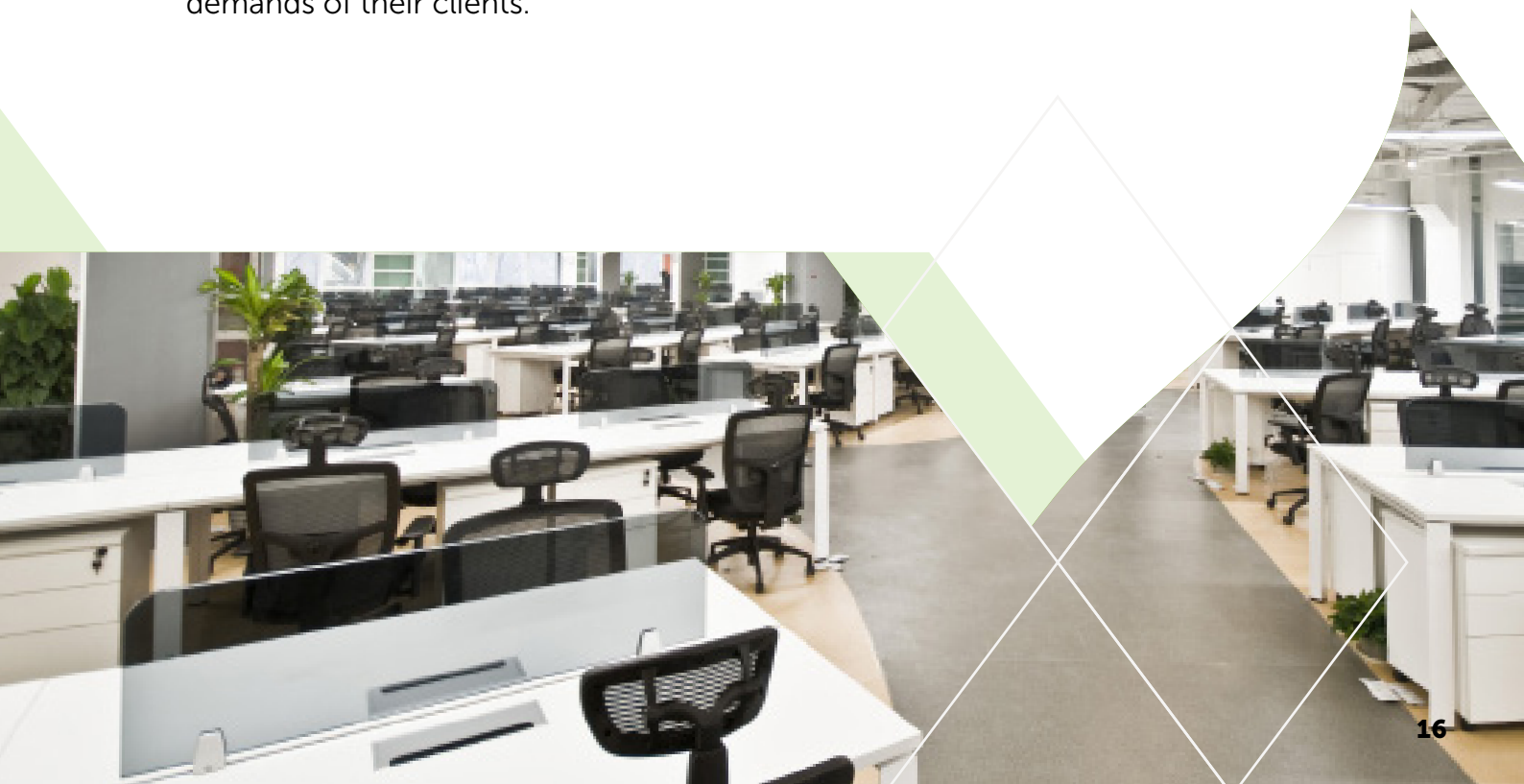


## 12 . How well does your serviced office meet your expectations?

2022 / 2023



Much like last year's results, the majority of our survey participants, totaling 46.5%, express a high level of satisfaction with their serviced office. Notably, this year, 25.4% of respondents feel that their serviced office aligns exceptionally well with their requirements. In contrast, only 4.1% and 1.2% of respondents reported that their serviced office fell significantly short of their expectations, respectively. These results suggest that workspaces have been successful in recognizing key industry trends and tailoring their offerings to better match the interests and demands of their clients.





# 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 2023](#)

[Industry Survey 2022](#)



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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.**