

UK Flex Office MARKET

2025

Sponsors:



The UK flex office market is experiencing a transformative period, with flex spaces now accounting for approximately 10% of London office space. This report examines the market dynamics, business models, and growth opportunities in this evolving sector.

52 UK brands with **10+ locations** totalling **1,230 locations**.

Business models:

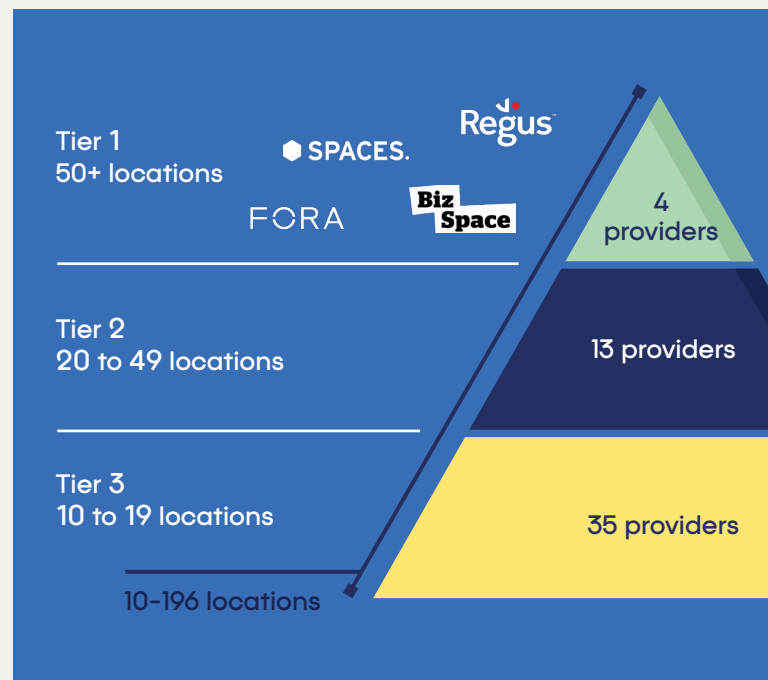
There are four main routes to market: Owner-Operator (35%), Management Agreement (16%), Franchise (3%), and Lease (46%). With a growing trend toward a hybrid model that combines management agreement and lease.

Regional distribution:

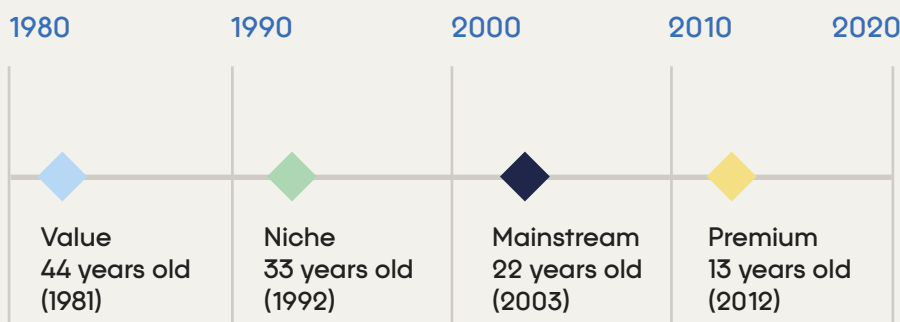
46% of key players maintain a presence in both London and regional markets, while 39% focus exclusively on regional locations and 15% operate solely in London.

Market Dynamics:

The pandemic accelerated polarisation in the sector. Newer entrants focus on premium, hospitality-led, and management agreement models, while established, property-led providers prioritise ownership and value-driven offerings.



The average age by segment:



*Source: Spaces to Places, January 2025. Note: Serviced >10 buildings in the UK

This data relates exclusively to the top 52 brands analysed in the UK market.

For full report and details download at spacestoplaces.co.uk/flex

