



Adapt To Survive: The Flex Space Revolution

An industry report

Insights, research and analysis into the current reality for asset owners

Accessia

www.accessia.com

Introduction

Workplaces are having to adapt to survive. Companies now expect more from their workplaces, including greater flexibility from their landlords to accommodate changes to their business due to market fluctuations, harsh economic realities, and hard-to-predict growth. On top of this, employees' needs for their spaces are evolving quickly.

Inevitably, with such varying demands and rapid change, some building operators and landlords are struggling to keep up. But the longer building operators and landlords fail to meet tenants' needs, the more pressure they face. Tenant churn, low occupancy rates, rising costs, falling revenue, and sustainability targets are all formidable challenges.

The rise of the flex space model has compounded this issue, making the fight for tenants more competitive than ever before. Many operators are being forced to adopt a flexible approach themselves just to compete, but the concept is still in

its infancy and the path from struggling traditional office building to profitable coworking style flex space is not well trodden.

How acutely are building operators feeling these challenges? What are their plans to tackle them? How will workplaces change in the coming years? These were the questions we set out to answer when we surveyed 200 UK asset managers at companies of various sizes, right across the country.

As a workplace access, experience and analytics platform that helps flex space operators attract and retain customers by understanding and optimising their spaces,

Accessia is uniquely placed in the market. We have direct insight into how the most successful companies in the industry are making decisions. Comparing this with the findings of this research is fascinating, and we believe this report will be valuable to anyone across the office and commercial building sector, from those considering transitioning from a traditional multi-let model to coworking, to those with an established flex space offering.

Mark Loney
CEO
Accessia

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Methodology

The research was conducted in February 2024 via a Censuswide survey of 200 UK asset managers in commercial property companies of varying sizes.

Profile of companies interviewed

Employees

10-49 employees.....	21.5%
50-99 employees.....	19.5%
100-249 employees.....	39%
250+ employees	20%

Location*

East of England	8%
Greater London	49%
East Midlands	13.5%
West Midlands	14.5%
North East	9.5%
North West	8.5%
Northern Ireland.....	12%
Scotland	11.5%
South East.....	8.5%

* Some respondents have operations in multiple locations
Percentage totals throughout this report may not equal 100% due to rounding to the nearest whole number



Executive summary

The traditional 9-to-5 office landscape for the most part no longer exists. This has had a significant effect on the nation's 435,000 office properties with 99% of asset managers agreeing it's harder to make money from commercial buildings post-pandemic.

One in five are now struggling to predict their revenue streams and 18% are grappling to maintain occupancy rates in their buildings, while 15% don't understand what tenants want.

A key driver for such a drastic market change, according to asset managers, is the reality facing SMEs which is preventing them from committing to traditional leased office spaces and means they are looking for flexible space solutions instead. 29% of asset managers say that organisations are finding it difficult to gauge when and how often their employees want to be in the office. 31% are juggling office-based, hybrid, and remote working employees. And a third

are investing in smaller satellite offices instead of one headquarters. This has created a significant lease disconnect in the market, with the tenant population wanting shorter leases which are out of sync with building owners' business models.

To address these issues and appeal to the SME market, many operators are adapting their portfolios to include flex workspace offerings. Done right, this holds the key to operator success.

However, despite 33% seeing transitioning to a flex model as an opportunity for commercialisation, only 16% are analysing how their communal spaces are being used. The key to unlocking this insight and making a success of the

flex space model is the intelligent use of data.

Collecting and analysing accurate people-attributed data on building or space usage is essential for optimising spaces to attract and retain tenants, boosting revenue, reducing costs, and improving security. But the majority are still operating in the dark when it comes to this. Time consuming solutions still proliferate. One in five still rely on floor walkers, tenant surveys are favoured by 20%, and 18% still use manual sign-in books to monitor people in their buildings.

With such limited data capture methods, it's not surprising that even the 49% who review their building data monthly report challenges. For instance,

on the security front, 92% of respondents admit there are people who no longer have official access to their buildings but who still possess key cards or other means of entry. This is a problem which can be exacerbated with the flex model, where a greater number of smaller tenants or paying individuals have access to a building.

But while adapting to a flex space offering has several benefits, from greater tenant satisfaction to an increased number of revenue streams, there are challenges for the market which are felt most acutely by the biggest operators with multiple buildings to modify. First and foremost are the high upfront costs of design and fit-out which concerns 30%. Plus, there is a combination of

Despite 33% seeing transitioning to a flex model as an opportunity for commercialisation, only 16% are analysing how their communal spaces are being used. The key to unlocking this insight and making a success of the flex space model is the intelligent use of data

ongoing costs to factor in. Tenants expect a much higher standard of ongoing services and there is more upkeep to contend with, which are challenges for 28% and 20% of asset

managers respectively.

There is also an environmental agenda to consider. This can be a big draw for tenants who expect their building to assist in their own race to net zero. As such, 21% of the market is actively working to make their buildings more environmentally sound. But this adds further cost pressure.

Such challenges need to be overcome to be successful in the new world of work. Companies need to rethink not only their business models, offering, and target markets, but also their approach to data collection and analysis if they are to successfully navigate the flex space revolution.



The current landscape

Modern working

According to the Office for National Statistics (ONS), there are 435,000 rateable office properties in England and Wales alone. These buildings once served the business community on a traditional working basis, Monday-Friday, 9am-5pm. But that landscape is drastically different today.

Indeed, 99% of the 200 asset managers in property companies studied for this report agree it's harder to make money from commercial buildings post-pandemic. Meanwhile, one in five say they are struggling to predict their revenue streams, 18% are battling to maintain occupancy rates, and 15% are struggling to understand what tenants want.

Operator priorities

A closer look at the main priorities of workplace operators reinforces the many commercial challenges they face.

One in five say they are struggling to predict their revenue streams, 18% are battling to maintain occupancy rates

1. Occupancy

One in five are focused on what you might call the sector's foundational issue, increasing occupancy rates. Unsurprisingly then, improving space appeal and making buildings look more high-tech are priorities for 17% and 20% respectively, both of which could be

interpreted as tactics to increase occupancy. Almost one in five (19%) are worried about low satisfaction amongst the people that use their building, coupled with a further 12% that are troubled by the uncertainty brought by their rate of churn.

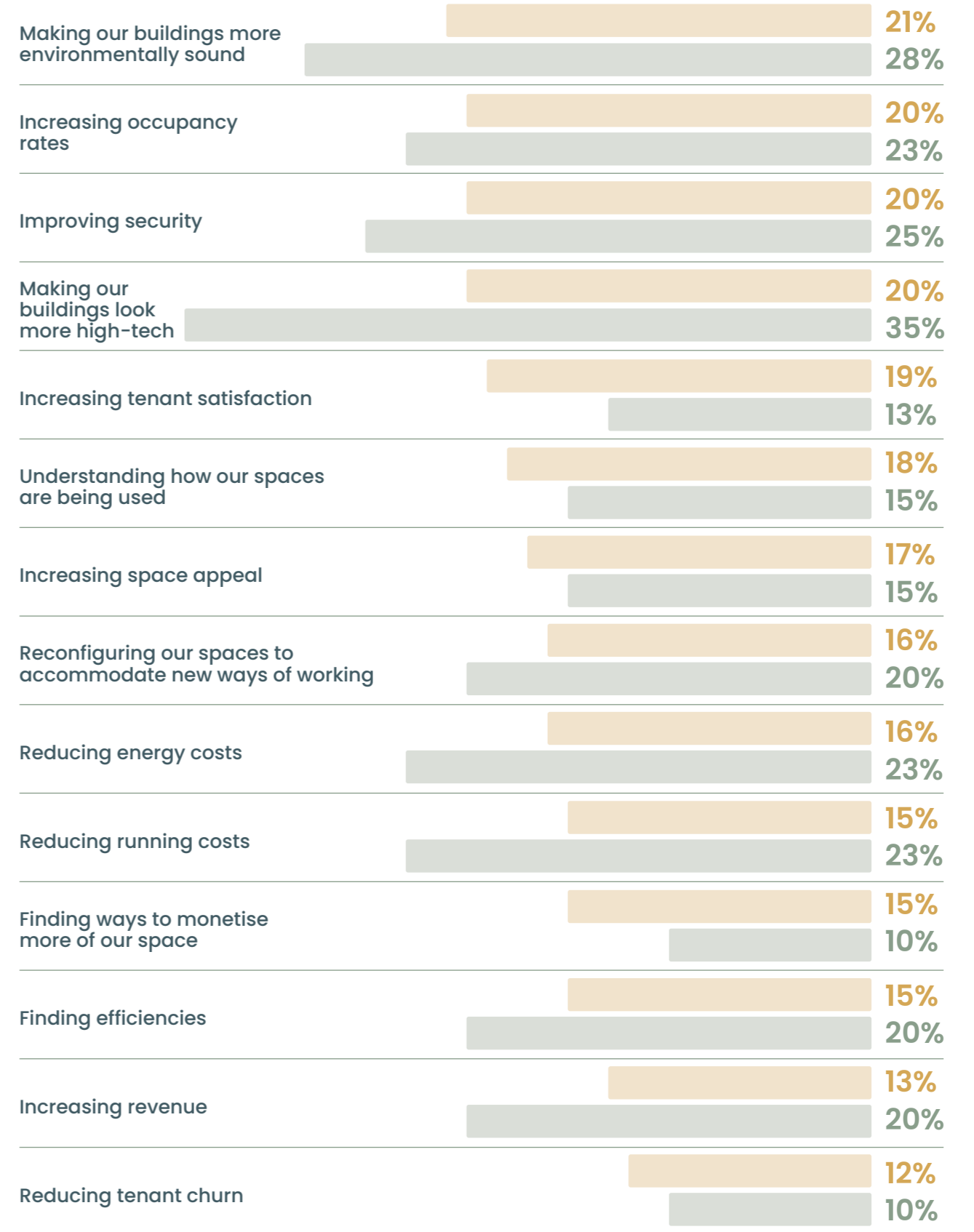
2. Space optimisation

To provide the right facilities to boost tenant satisfaction, operators need to understand how their buildings are currently being used, but 18% have identified this as a significant and high-priority problem, according to our research. This lack of insight will be hindering the 15% trying to find ways to monetise more of their space. It also won't help the 16% trying to successfully reconfigure their buildings to accommodate new ways of working.

Overall operator priorities

Pressures felt by the larger companies studied

Overall priorities
Priorities for companies with 250+ employees



3. Savings

With companies struggling to make money from their buildings, cost cutting is high on the agenda. Almost one in six (16%) are trying to reduce energy costs, 15% are focused on minimising other running costs, and 15% are looking for other efficiencies to reduce overheads.

4. Sustainability

Adding a layer of pressure to an already difficult situation, tenants and regulators are increasingly expecting asset managers to be investing in reducing their building's impact on the environment. This is particularly true for corporate tenants with ESG (environmental, social, governance) targets. These tenants expect their entire supply chain, including their landlords and workplace operators, to support their commitment to achieving net zero emissions and, with the growing focus on retrofitting the UK's building stock, 21% of those we surveyed said that making their buildings more environmentally sound is a priority.

You might think that larger operators might be insulated from the harshness of the market, but this isn't borne out by the data. These pressures

are felt more acutely by the largest organisations surveyed, suggesting a multiplier effect in bigger property portfolios.

The lease gap

Coupled with these priorities are growing concerns about the future of tenancy leases. Over a third (36%) of operators believe that the days of tenants signing long leases are over.

Perhaps these are the pessimists of the group, but the lease lengths uncovered

Tenants and regulators are increasingly expecting asset managers to be investing in reducing their building's impact on the environment

by the research suggests they are more likely realists. Indeed, there's a serious market misalignment – a significant gap between the length of lease wanted by tenants and operators.

44% of operators say a lease of five or more years best suits their business model, but just 32% report that tenants want such a long lease. Indeed, 30% say tenants want a maximum lease of two years.

This shift could be caused by residual doubts following a period of economic uncertainty where

companies are still finding their new normal and don't want to commit themselves to a long lease in the meantime.

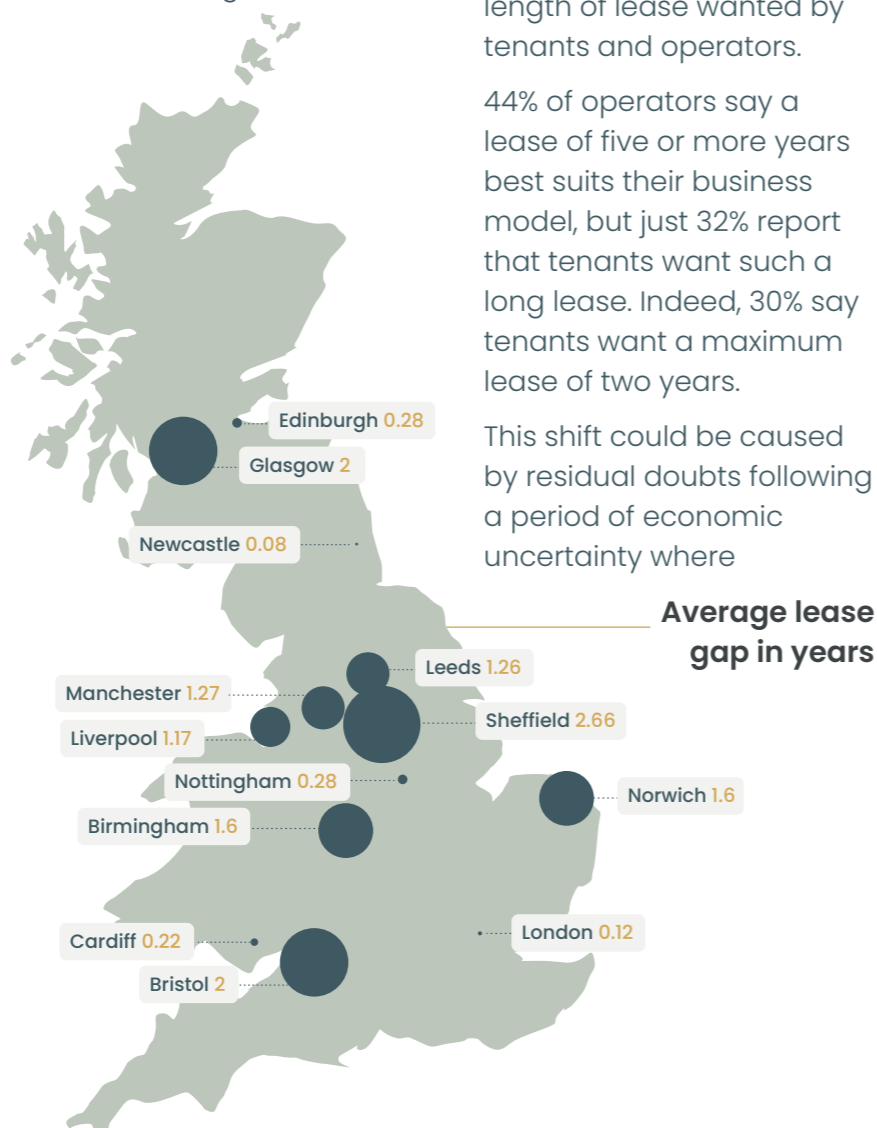
But it could also be caused by business needs changing, with many now wanting smaller offices or multiple regional offices that are in a building that offers a mix of spaces such as meeting rooms, quiet working areas, collaboration spaces, and communal kitchens. Flex space models that offer this range of amenities typically also offer shorter lease lengths.

In every part of the UK surveyed, on average, tenants want a lease that is shorter than the lease landlords would like. This is a significant market pressure on building operators and is forcing them to compromise or rethink their business models to move towards a flex space offering. It's worth noting that this disparity could well continue to grow, only follow-up research will uncover if this is the case. One thing that is clear

Tenant uncertainty

- 29%** say tenants are struggling to gauge how many of their employees want to be in the office, and when
- 31%** say tenants are juggling office-based, hybrid, and remote working with a workforce that want a nice office to go to but don't want to be there all the time
- 33%** say tenants are investing in smaller offices in multiple locations to attract and benefit from pockets of talent across the UK

This is also true for large corporations: 27% say that even large corporate tenants want a mix of smaller spaces at their disposal for their dispersed workforce to work from when needed



from this data set alone, though, is that this pressure is forcing operators to think increasingly laterally. A third (32%) say they are having to offer a mix of spaces in their buildings to accommodate tenants so that their office spaces don't remain empty.

Tenant uncertainty

Part of the problem – and potentially driving this demand for shorter leases in buildings that offer a mix

of spaces – is the reality facing companies in the UK. Tenants are facing uncertain times, so they themselves don't know what commercial space they need now and in the future. They are still trying to work out how the hybrid working revolution will finally play out in their organisations and are continuing to experiment with different approaches.

Redesigning the offering

In adapting to the changing needs of tenants and occupiers, a flex space revolution appears to be well underway.

But the flexible offering is itself still in flux. Indeed, 15% of operators agree it's hard to know what spaces or services tenants want. As such, not all operators are

taking the same approach. As the flex space concept continues to evolve, each operator is considering different facilities and features to invest in which

is fuelling fierce competition for tenants and members. But without knowing for sure, any investment in services and facilities is a risk.



From a myriad of possibilities, operators offer everything from:



Social events for tenants
25%



Communal meeting rooms for hire
24%



Communal kitchen areas
24%



An in-house café
24%



Phone or video booths
22%



Solo workspaces
19%



Membership with some member perks
20%



In-building gym
18%



Lockers
17%



Showers
13%

Does this solve the problem?

No matter what mix of spaces and services companies offer, there are some common benefits from the flex space model which tenants value.

They have no headaches setting up their space. In flex spaces, the building is ready for tenants to move into from day one and, according to 21%, this is the biggest advantage to tenants.

The space looks high-end without the investment. Companies can move into a contemporary space with a design that is finished to a high standard without having to spend

A beautiful workspace helps tenants project an image that marries with how they want to be perceived, say 21% of operators

time and energy on their own fit-out. 19% agree this is a significant benefit to tenants.

Easier to attract talent. This design, along with the amenities you might expect to find in a flex space, makes attracting workers easier, which is noted by 20%.

Positive impact on tenant brand and reputation. A beautiful workspace

helps tenants project an image that marries with how they want to be perceived, say 21% of operators.

The space can scale as required. With a flexible lease or membership term, companies can expand their space as they grow, or shrink as their workforce changes. One in five operators acknowledge this as a key benefit for tenants, especially for SMEs where circumstances can change quickly.

It's low risk. It's a low-risk option for tenants and 17% agree this is what they value most about being in a flex space.

The benefits for operators

It's not just tenants who have a lot to gain from the flex space model, all 200 operators interviewed identified several commercial advantages.

Increase revenue. With a flex space, there are more opportunities to generate revenue from the square footage. Firstly, tenants are paying a premium for the benefit of everything being

Flexible leases are more appealing to SMEs who can grow or shrink rapidly

done for them.

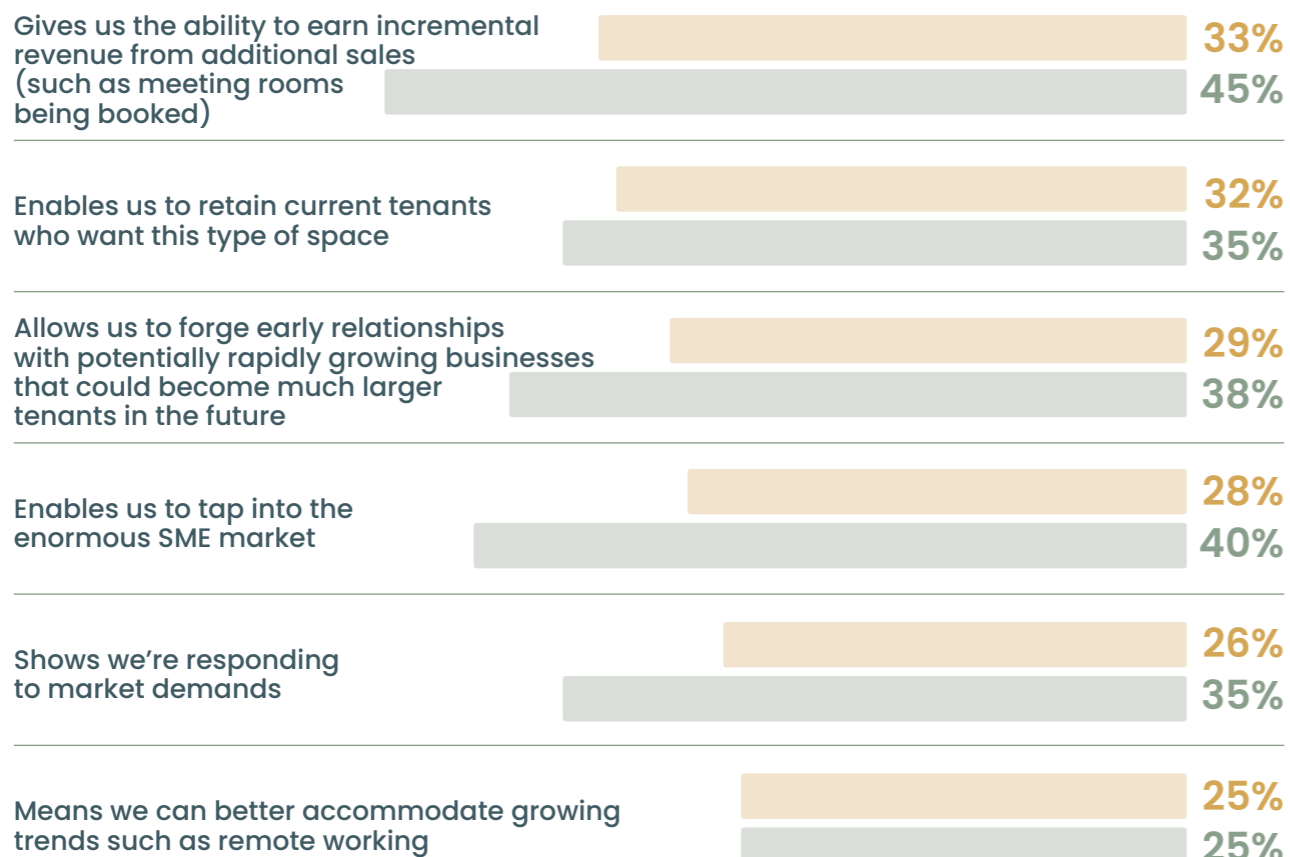
Plus, a third of operators agree there are options for additional revenue streams such as meeting rooms. Not only can tenants rent these, but they can also be offered to external

organisations that require a professional setting to host clients or meetings. Similarly, communal spaces can be rented for functions or events during the working day or after hours.

Retain tenants. With the move away from employees reporting to the office five days a week, many organisations are giving up their big office spaces. However, 32% of operators agree there is

Opportunities for flex space

Overall opportunities For companies with 250+ employees



an opportunity to retain them in some capacity by adapting their building's offering to be a flex space. Tenants will likely take a smaller space but pay a premium to rent it as an A+ or B category finish.

Forge relationships with SMEs.

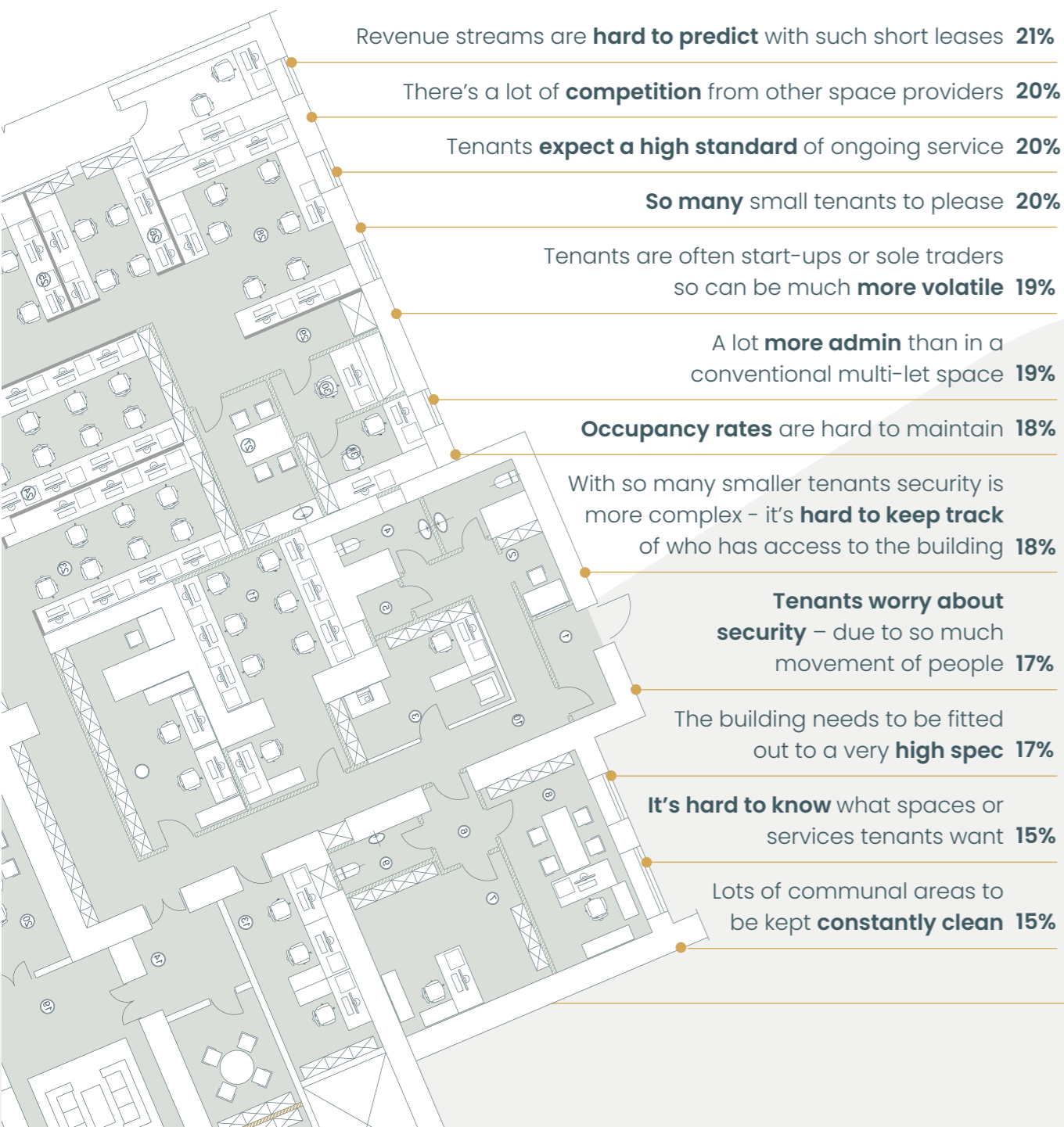
Flexible leases are more appealing to SMEs who can grow or shrink rapidly. 28% of operators agree that taking a flexible approach means they can tap into these smaller companies more easily.

While, as we saw, the largest property companies studied felt the challenges

more acutely, they also agree they will benefit most from a flex space model. Almost half (45%) feel positive about their ability to better monetise space such as meeting rooms, and 40% are excited by the prospect of forging early relationships with SMEs.

Flex space competition now and in the future

All in all, adopting a flex space approach seems like a sensible commercial decision. But it still comes with its own set of challenges for operators to navigate.



There's lots of competition.

As we have discussed already, many operators are offering some kind of flex space, so there's a lot of competition. Presently, only 1 in 5 operators are concerned by the level of competition. They need to offer something different from the rest to stand out, but 15% don't understand what tenants want. All this data reflects a market in its infancy with a wide interpretation of the flex space offering, from shorter leases to coworking, and it could well be that operators are underestimating the fierce competition on the horizon.

High upfront cost. Tenants want spaces that look great and are fitted to a high specification so that they don't have to spend time setting up the space, especially when they don't have a dedicated facilities management team, but this can't be achieved with a traditional budget. It's no wonder then that 17% of operators are concerned about the upfront investment required

Tenants want spaces that look great and are fitted to a high specification so that they don't have to spend time setting up the space, especially when they don't have a dedicated facilities management team

to meet the expectations of modern tenants.

Tenants expect a high level of ongoing hospitality.

Being in a flex space building means tenants benefit from having dedicated admin and facilities staff on hand to help with any issues. This is ringing alarm bells for 20% of operators for whom this is likely a step up in terms of the service they currently offer.

It can be difficult to attract and retain great front-of-house and maintenance staff who can nurture relationships with all tenants at a

consistent level, especially in a competitive market. Relationships are crucial in flex spaces, having a high staff churn in these roles will be unacceptable to tenants and risks them leaving in favour of a competitor.

Building upkeep is a challenge. Tenants expect their spaces to always be clean and in good condition. In a flex space environment, there are multiple communal spaces, including kitchens and meeting areas, often across several floors. Operators need to have a plan in place for cleaning these various areas which can require a larger budget than in a traditional building. For a community where one in five is already grappling with expensive challenges such as improving environmental performance and 15% are trying to reduce running costs, the pressures of running a flex space feel acute. 19% worry about the admin required and 15% are concerned about the amount of communal areas that have to be kept clean.

It's hard to know what mix of spaces to offer.

There are many interpretations of the flex space model. Knowing the right combination of services and spaces to offer, including meeting rooms, private offices, hot desks, communal kitchens, and member events, is essential to attracting and retaining tenants but appears to be a real challenge for almost one in six.

Occupancy rates are still low.

On-site office hours have shifted from the traditional Monday-Friday, leading to many corporates giving up their large office spaces. Now, 18% of building operators are dealing with low

tenancy rates. And because operators must offer shorter lease agreements and more flexibility across the board, 21% are concerned with the volatility in their revenue streams. With the competition in mind, some may be wondering if there are enough organisations out there in a position to fill all those spaces.

Security

Security is another major challenge. 92% of operators admit that there are instances of people who no longer have official access to their buildings, but who still possess key cards or other means of entry. It's no wonder then that one in five operators are

Keeping rooms locked has a negative impact on revenue as well as creating an admin burden

primarily concerned with security issues.

In broad terms, the flex space business model results in having lots of smaller tenants, rather than a few larger ones. This means more people coming and going from the building from a wider spread of companies, which adds layers of complexity.

Not knowing who is in the building is a concern for several reasons, not least

in the instance of a fire or other emergencies requiring building evacuation. Plus, many tenants – especially those in the tech, legal, or financial sectors – will have precious intellectual property and client data to protect. For the 21% of tenants primarily concerned with security, they will require assurance that a flex space can deliver a secure base for their business before signing any lease agreement.

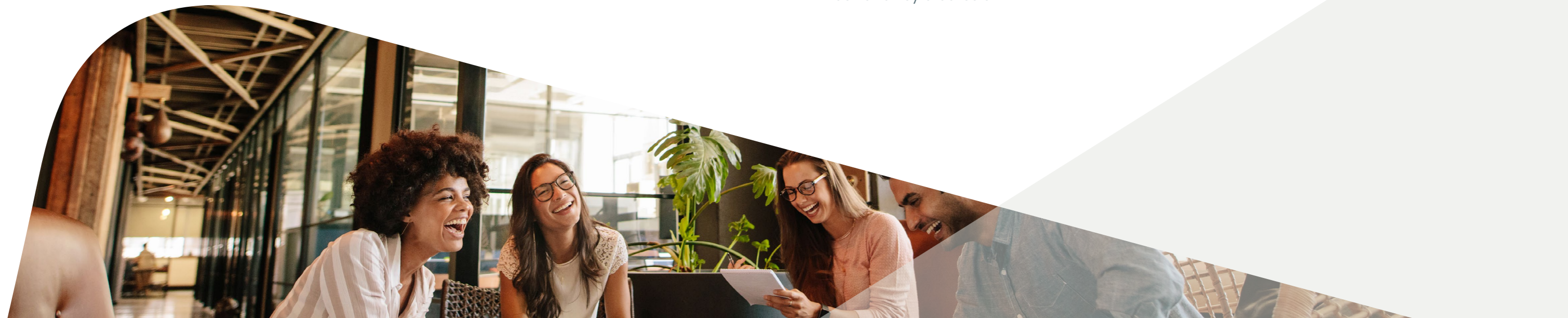
A poor security provision can create as many problems as no security provision, just in different ways. 24% of operators offer communal meeting rooms. Securing those rooms with lock and key creates an

admin task for front-of-house staff, and 19% are deeply concerned with reducing admin. Leaving them unlocked creates a free-for-all approach that goes unchecked and, most importantly, means they are uncharged and so is a missed opportunity for generating revenue.

The survey also shows that the vast majority of operators use clunky and outdated measures of security including keys (23%), swipe cards (17%), and key fobs (15%) which doesn't present a high-tech experience. What's more, 9% of operators say they still rely on

staffed reception desks as their front-of-house security. But these can be easily bypassed.

Not only does this present a concern from a security perspective, but it hinders the very experience tenants expect and that operators rely on to attract tenants.



The role of data

Given the challenges, including fierce competition for tenants, the cost of getting the flex space offering right, and the need to minimise operating costs and balance security, operators need to be smart with how they make decisions.

Insights and data will be vital to demonstrate how buildings are being used and highlight areas for improvement that could make all the difference in a highly competitive market.

Gathering data

Given the importance of data, it's interesting to see that the majority of operators are reliant

on manual means of data collection including watching CCTV, floorwalkers, and sign-in books. Manually collected data is far harder to analyse in any meaningful way. Even those who are relying on technology by using PIR or people counting sensors aren't getting a complete picture. That's because these methods don't collect people-specific data, and

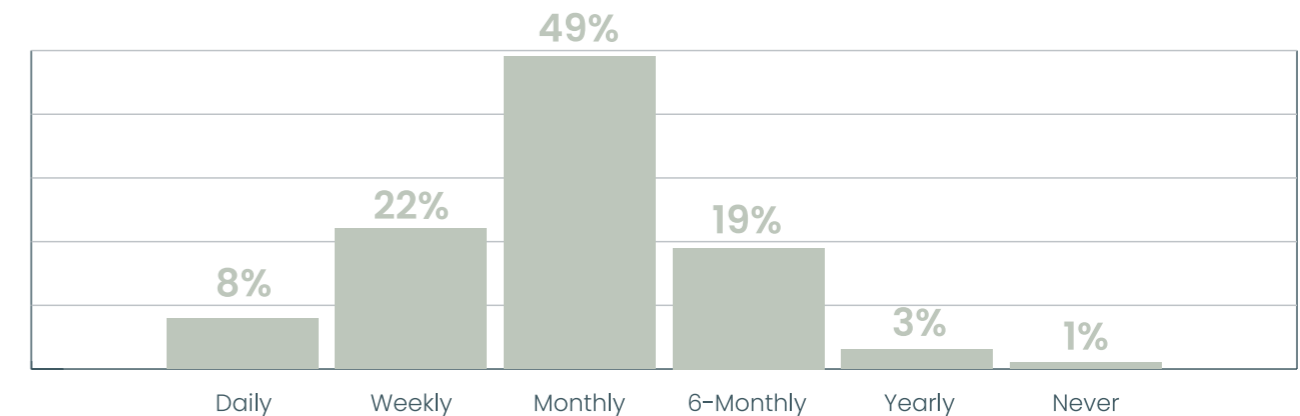
the data can be inaccurate and unreliable, making it difficult to make clear conclusions about who, and/or which teams or tenants, are using the space.

Despite the commercial pressures building operators are facing, many are missing a trick in terms of understanding how their space is being used, who's coming and going or

How building operators gather data

- Video analytics / **25%**
- WiFi monitoring / **22%**
- Current access control data / **22%**
- PIR sensors / **22%**
- Tenant surveys / **20%**
- Floorwalkers / **20%**
- Desk booking data / **19%**
- Desk occupancy sensors / **19%**
- Manual sign-in books / **18%**
- Analysing meeting room booking data / **16%**
- People counting sensors / **16%**

How often operators review their building data



showing signs of potential churn, what areas of their building are underutilised, and what's being needlessly heated. In short, they are missing opportunities to understand how their space is being used which will help to retain tenants and to have an offering that appeals to prospects.

Using the data

Our research amongst 200 building operators shows that the majority (72%) don't review their data frequently enough. Reviewing data less than weekly means operators can't act with agility to identify potential issues before they arise, which risks tenant dissatisfaction and a loss of revenue.

Delving deeper, the largest operators are 22% more likely to review their data daily and 40% review their

data weekly compared to a quarter of the smallest corporations. This may be because they use more sophisticated systems which make the data easier to gather, access, and analyse. Regardless of size, all operators should be prioritising intelligent data analysis as this is the key to growing a flex space business.

Data shortcomings

But even the 30% who say they review their building data weekly or more still have serious concerns over tenant satisfaction, occupancy rates, how their space is being used, revenue streams, and security. This raises three questions:

1. Do they have the right data?

Not all data is created equal.

Reviewing data less than weekly means operators can't act with agility

Accuracy can be a challenge if data isn't being collected in a meaningful way. For example, 18% of buildings use manual sign-in books but it's easy to bypass these, meaning building data could be wildly inaccurate. Sign-in books also fail to tell the whole story as they only capture entry and exit times without any context to which spaces an individual has used. Similarly, access control data doesn't show if someone follows another person into the building, nor does it show when someone leaves or their movement throughout the building. Conversely, data

that is attributed to people provides granularity as to what happens within a space, opening up a world of insights to operators.

2. Are they analysing the data in a sensible way?

Having the right data is step one. But step two is analysing it.

Our research shows that despite 24% of operators offering communal meeting rooms, only 16% are capturing and reviewing data related to the rooms' use, which highlights a significant missed opportunity in understanding how spaces

are used and whether they offer the right space configuration and sizing.

Without holistically and regularly analysing building data, operators can't understand which days of the week are busiest and plan resources accordingly, which areas are used most frequently and so will need more cleaning, and which are underused in their building. So, it's impossible to ensure they are offering everything their tenants need and expect, which is the only way to guarantee tenant satisfaction and retention.

3. How long does the data take to analyse?

Time is precious.

In an industry that is already fighting many battles, there is often little time to spend hours or days analysing building data. But without doing so, operators risk missing valuable insights that would potentially help them improve their offering, their occupancy rate, and tenant satisfaction. Therefore, data and reports need to be delivered quickly and in an easily digestible format that allows for quick analysis and decision making.

How data can help #1

Optimise spaces and understand members

Understanding which kinds of spaces different member-types prefer is essential for getting the balance right so that members love the space. For example, it's easy to assume that freelancers and individual members are the most likely to use the open coworking spaces such as benches, sofa areas, and individual desks over members with teams working in private office spaces. However, accurate, people-attributed data may reveal instead that individual workers or freelancers almost exclusively book meeting rooms, perhaps to host clients, but rarely use the sofa areas.

On a similar note, data can help operators understand what extras are worth investing in. For example, if a building offers a gym, but the data shows that few members are using it, operators can know they either need to encourage more use of the space or repurpose it into something that members value more.

People-attributed data can also provide an overview of which events are well attended and how engaged members are, making it easier to identify who might be at risk of churning and allowing the operator to take preventative steps.

Understanding space usage will help operators make decisions on getting the mix of spaces right.

It will also help with space optimisation.

In this example, imagine there are five meeting rooms on one floor. Building data can offer insights into how often these spaces are being used. It might be that all of the meeting rooms are oversubscribed which is causing frustration amongst members who find it difficult to make a booking.

By understanding the data, flex space operators can make informed decisions to make their space work harder for their customers, which is a concern for 16% of operators. In this case, they could discover that the meeting rooms are too big and, although booked,

remain under capacity. These five meeting rooms could then be reworked to create eight meeting rooms instead or smaller phone booths could be installed to facilitate quiet working or 1-1 calls. This will relieve frustrations with tenants and increase revenue.

Sharing current space occupancy with tenants can further help alleviate frustrations as they can easily see what spaces are available in the building. For example, if they need a meeting room at the last minute, they can easily see if one is available or not rather than walking around the building to find that they are all in use.

Together, this approach means that operators will have a deeper understanding of their tenants to allow them to analyse and predict trends in occupancy rates. Having this understanding will allow operators to act with agility and remove the fear of a volatile market, leading to more predictable revenue based on more accurate tenant churn and occupancy forecasts.



How data can help #2

Save costs

For 15%, reducing running costs is their number one priority. For them and everyone else working to make savings, building data can help. Insights can help operators map the usage of different areas of the building. This can be used to help housekeeping teams devise an effective

cleaning schedule to ensure frequently used spaces are checked and cleaned more regularly, and less time is wasted in unused areas. Similarly, data can show which days of the week are busier than others and additional cleans can be included if necessary. This ensures efficiency, streamlines

costs, and increases tenant satisfaction.

Using similar data can help plan heating and air conditioning throughout a building, ensuring that spaces aren't using unnecessary energy. Not only will this reduce bills, but it serves a sustainability purpose too.

How data can help #3

Provide security reassurance

For 17% of tenants, security is a critical issue. Yet 92% of operators say they have a problem with people who shouldn't have access being able

to get into a building. A good combination of hardware and software that integrates with an existing CRM will let people get on with what they need to, without adding unnecessary friction.

This is while protecting against revenue loss and reputational damage by keeping spaces secure and alerting building staff of any issues in real-time.

Together, this approach helps operators not only understand how their spaces are currently being used, but also how they can make more of their buildings. They can unlock new revenue streams by

diversifying their offerings or adjusting the type of amenities, services, and spaces already offered. And ultimately, they can increase tenant satisfaction, retention, and attraction to get ahead of the

competition. Those who best collect and analyse data without adversely impacting the tenant experience will be best placed to successfully navigate the flex space revolution.

About Accessia

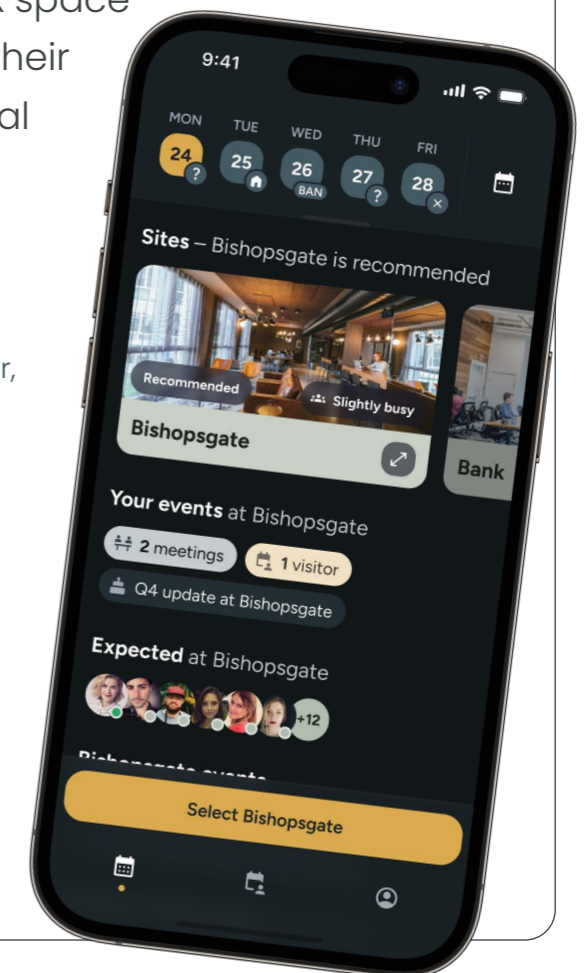
Accessia is the workplace access, experience and analytics platform that helps flex space operators understand and optimise their spaces while delivering an exceptional experience for members.

Using smart location services to harness people-powered data and deliver the insights that matter, Accessia is the key to success in your spaces and can be used standalone or integrated into your existing apps.

Accessia was founded by a group of problem-solving innovators who believe in building better - better data and better experiences for better workplaces. With over a century working in tech between us, your space is in safe hands.

To find out more, visit www.accessia.com

 Read our US report 'Adapt To Survive: The Coworking Revolution'





Accessia

95 Aldwych
London WC2B 4JF
www.accessia.com