

wework

BUSINESS INTELLIGENCE

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MID-YEAR SNAPSHOT:

The State of Flex at WeWork

An analysis of how companies utilized WeWork's spaces worldwide, comparing the first half of 2025 with the first half of 2026.

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Key Takeaways

8 in 10 

companies kept or expanded their WeWork footprint year over year.

9.9% 

was the growth rate of the average footprint per company, increasing from 10.5 to 11.5 seats in the first half of 2026.

14 

of WeWork's 20 major markets grew their footprint, led by London (+26%), Buenos Aires (+21%) and Paris (+19%).

14.8% 

growth in average footprint (7.8 to 9.0 seats) by small businesses, while enterprises grew 5.6% (105 to 111 seats).

10.7 

desks and 11 months were the average agreement terms, holding steady year over year.

San Francisco 

was the standout market for member growth: 8% more companies than a year earlier, with enterprises up 11%.

20.4% 

growth in On Demand reservations year over year, averaging 82,241 a month.

KEY TAKEAWAYS

In the first half of 2026, the average company's footprint at WeWork was nearly 10% larger than a year earlier, a gain led by the smallest companies and shared by the largest, from one-person startups to large enterprises.

Worldwide, 8 in 10 members present in both years kept or expanded the space they occupy.

Flexible space is becoming a core component of their real estate strategy: the same behavior [WeWork found among large, multinational corporations](#) utilizing its spaces earlier this year, now visible across the full member base.

That is the state of flex at WeWork today: companies of all sizes are committing to more space.

This report draws on WeWork's proprietary membership data to compare the first half of 2025 with the first half of 2026, spanning every member company worldwide across all membership types except Business Address.

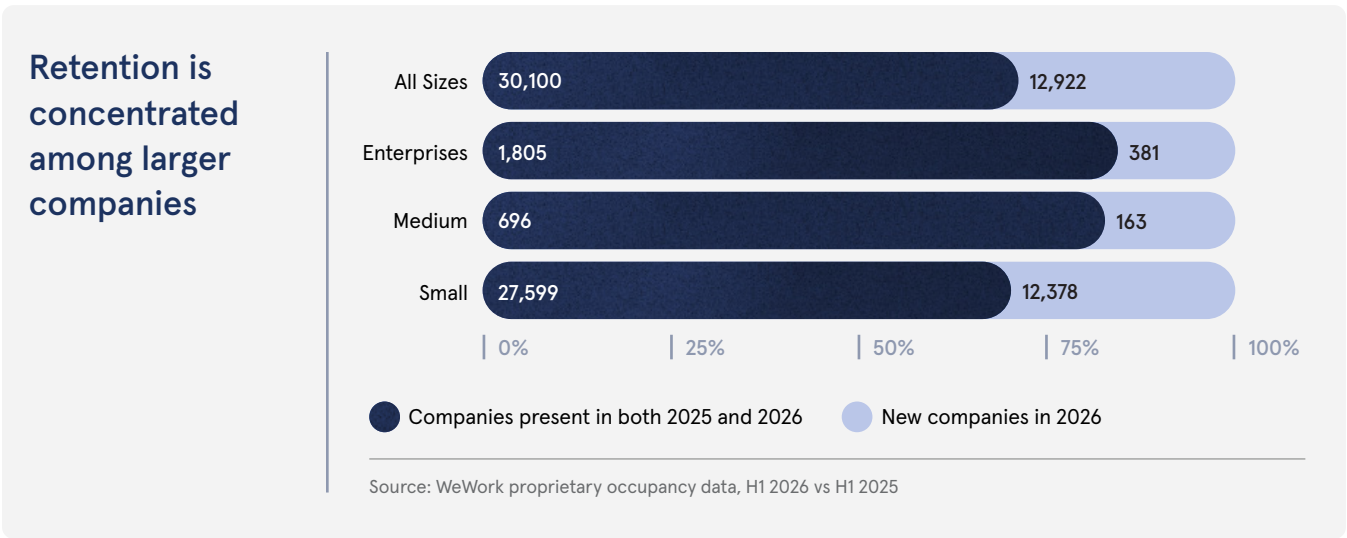


A Network of 43,000 Companies

In the first half of 2026, 43,022 companies were WeWork members. 7 in 10 had been with the company a year earlier; the other 12,900 or so were new.

The network is keeping more of its members than it used to. The share of companies present in one year but not the next fell by nearly seven points year over year, from about 41% to 35% – roughly 6,500 fewer departures than the year before. Most of the companies that leave are small businesses, which also make up most of those joining, as smaller firms tend to open, grow, and close more often than larger ones.

So even as companies cycled through WeWork, the shape of the network stayed the same: mostly small businesses, with a steady share of enterprises and mid-size firms.

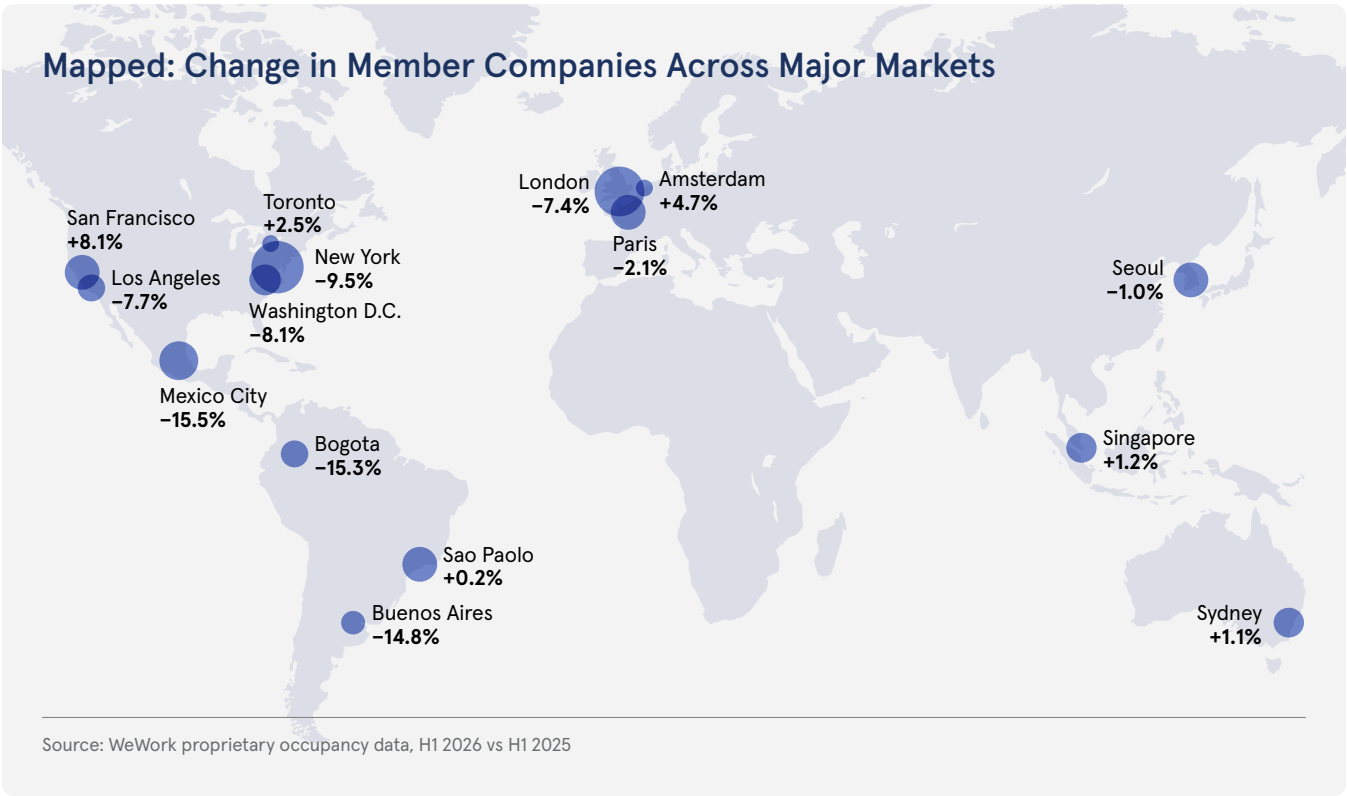


Where the Network Grew

San Francisco stood out on the map: membership grew 8% on a wave of new small teams, with enterprises up 11%. Nearly half its members (48%) joined in just the past year, the highest share of any major market, with **Miami** close behind at 44%. This fits what's happening across San Francisco, where AI companies have been taking a lot of office space. [CBRE](#) found the city's office vacancy dropped about five points in a year, the biggest fall of any major U.S. city.

Amsterdam and **Toronto** also grew by 5% and 3%, respectively. In Amsterdam, the gains came from every size of company, with enterprises up 10%; in Toronto, small businesses led, up 6%.

Across Asia-Pacific's major markets, the network held steady: **Singapore** and Sydney each grew about 1%, with small businesses in Sydney up 4%, and **Seoul** was essentially flat.



Bigger Footprints, Steady Deals

Companies are holding more space than a year ago, even though the size and length of the agreements they sign have changed very little.

10% more seats per company

On average, companies occupied **11.5 seats per month in the first half of 2026**, up from 10.5 a year earlier, a 9.9% increase.

Small businesses drove most of it. Their average footprint grew from 7.8 to 9.0 seats, up 14.8%. Enterprises expanded from 105 to 111 seats, up 5.6%. Mid-size firms held steady at around 33 seats.

Part of that rising average reflects turnover among the smallest companies that cycle in and out of WeWork.

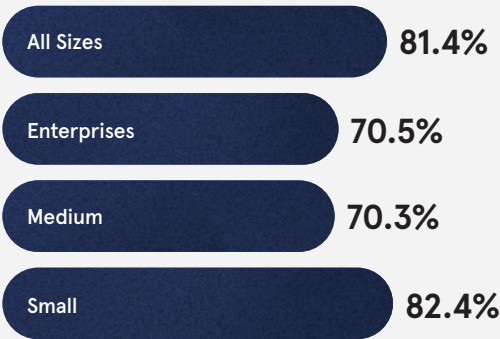
The more telling measure is what individual companies did. Among the 30,100 companies present in both periods, **81% kept or expanded their footprint**. That holds across sizes: 82% of small businesses, 71% of enterprises, and 70% of mid-size firms.

The same holds by market. In every market analyzed, at least 80% of companies that stayed kept or grew their space, and in several, it was higher: **91% in Miami, 90% in Amsterdam, 88% in Seoul, and 87% in São Paulo, Los Angeles, and Chicago.**

Footprints grew for every segment except mid-size companies



8 in 10 companies kept or grew their space



● Share of companies present in both H1 2025 and H1 2026 that kept or expanded their footprint

Source: WeWork proprietary occupancy data, H1 2026 vs H1 2025

Footprints by Market

Footprints for every segment grew in 14 of the 20 major markets, with small businesses growing theirs in 18 of 20 major markets.

In the **United States** and **Canada**, **Los Angeles** led with the average footprint up 13%, followed by **Washington, D.C.** and **Boston** at 10%, **Toronto** at 8%, and **Chicago** at 5%. In **Los Angeles** and **Washington, D.C.**, enterprises led, expanding their footprints by 45% and 26%. **San Francisco** added enterprises faster than any other US market while keeping its average footprint level.

“Companies increasing their flexible space footprint across the United States and Canada is indicative of the new status-quo: a growing need for speed, agility, and adaptability in their real estate portfolios in today’s fast-paced and rapidly evolving economy. From San Francisco to Washington D.C. and everywhere in between, even the largest enterprises are continuing to lean on flex to deliver exceptional workplace experiences for their employees while decreasing their long-term commitments where it makes sense.”

— Luke Robinson | *Regional President for North America, WeWork*

In **EMEA**, **London** grew 26% and **Paris** 19%, with companies of every size adding space: London's enterprises expanded their footprint by 48% and its small businesses by 12%. London's growth comes amid a broader shift in the city, where [flexible space now accounts for about 10% of all central London offices](#), and [CBRE](#) expects it to reach 20% by 2030. Elsewhere in EMEA, small businesses in **Berlin** and **Amsterdam** added space as well, up 19% and 32%, respectively.

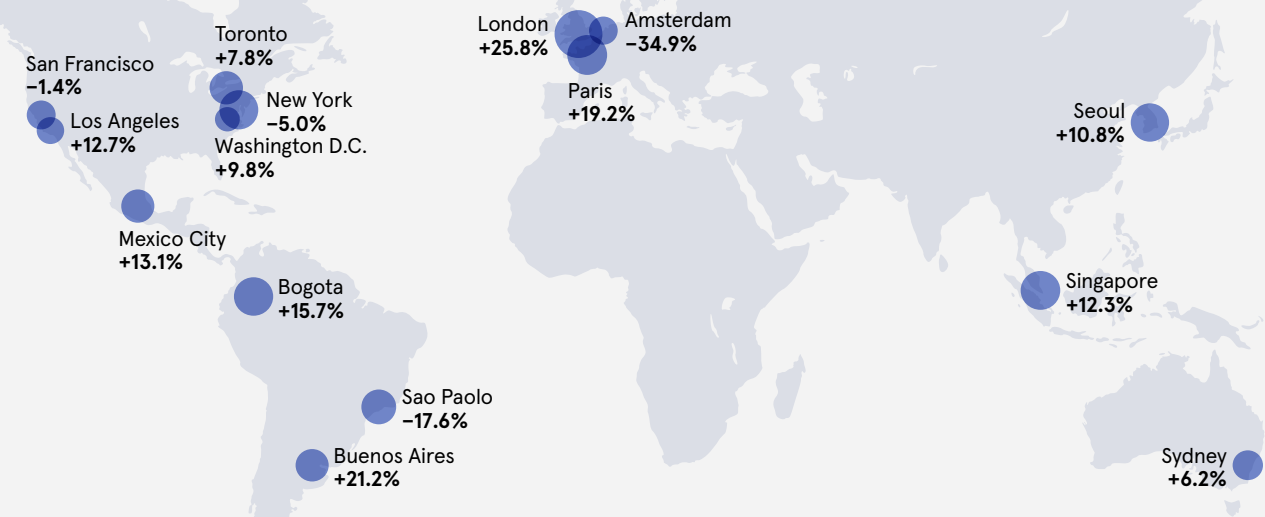
“Our latest data shows flexible workspace becoming an increasingly important part of companies’ real estate strategies. London is a powerful example: the average footprint of companies in our locations has grown significantly. Businesses increasingly recognise that they can’t predict exactly what their headcount or space requirements will look like several years from now. Flex gives them the agility to adapt as those needs change and is becoming a core part of how companies plan their real estate for the long term.”

— Luke Armstrong | *Regional President for EMEA, WeWork*

Asia-Pacific grew across the board: **Singapore** up 12%, **Seoul** 11%, **Sydney** 6%. Enterprises in Singapore grew their footprint by 22%, and in Sydney by 16%.



Mapped: Footprint Change by Major Markets



Source: WeWork proprietary occupancy data, H1 2026 vs H1 2025

Deal Sizes and Terms Held Steady

The deals being signed tell a steadier story. Across new and renewal agreements for committed, multi-desk memberships, **the average deal was 10.7 desks in the first half of 2026**, up from 10.3 a year earlier, a 3.8% increase. **The average commitment was 11 months**, up from 10.8.

By size, little moved. Small deals of 1 to 9 desks, mid-size deals of 10 to 49, and large deals of 50 or more all stayed consistent with the year before: within a desk or two in size and half a month in length.

One year on, companies aren't signing dramatically bigger or longer deals. They're holding more space overall and staying in it. Flexible real estate lets them add seats as teams grow, without committing to a fixed floor plan.

New Deals, Same Terms

	AVERAGE DESKS	AVERAGE TERM
All Deals	10.3 $\xrightarrow{+3.8\% \text{ YoY}}$ 10.7	10.3 $\xrightarrow{+2.1\% \text{ YoY}}$ 11.0
1-9 Desks	3.5 $\xrightarrow{-3.1\% \text{ YoY}}$ 3.4	10.5 $\xrightarrow{+2.2\% \text{ YoY}}$ 10.7
10-49 Desks	19.9 $\xrightarrow{+1.0\% \text{ YoY}}$ 20.1	11.3 $\xrightarrow{+2.6\% \text{ YoY}}$ 11.6
50+ Desks	117.2 $\xrightarrow{-1.2\% \text{ YoY}}$ 115.8	14.5 $\xrightarrow{-2.9\% \text{ YoY}}$ 14.1

Source: WeWork proprietary occupancy data, H1 2026 vs H1 2025

“A 21% increase in space per company in markets like Buenos Aires, and 87% of companies retaining or expanding their space in key markets such as São Paulo, confirm that flexibility is no longer a temporary alternative but the cornerstone of corporate efficiency and growth in the region.”

– Claudio Hidalgo | *Regional President for LATAM, WeWork*



On Demand Up 20%

Reservation data offers a different view of the network, capturing desks and rooms booked through On Demand.



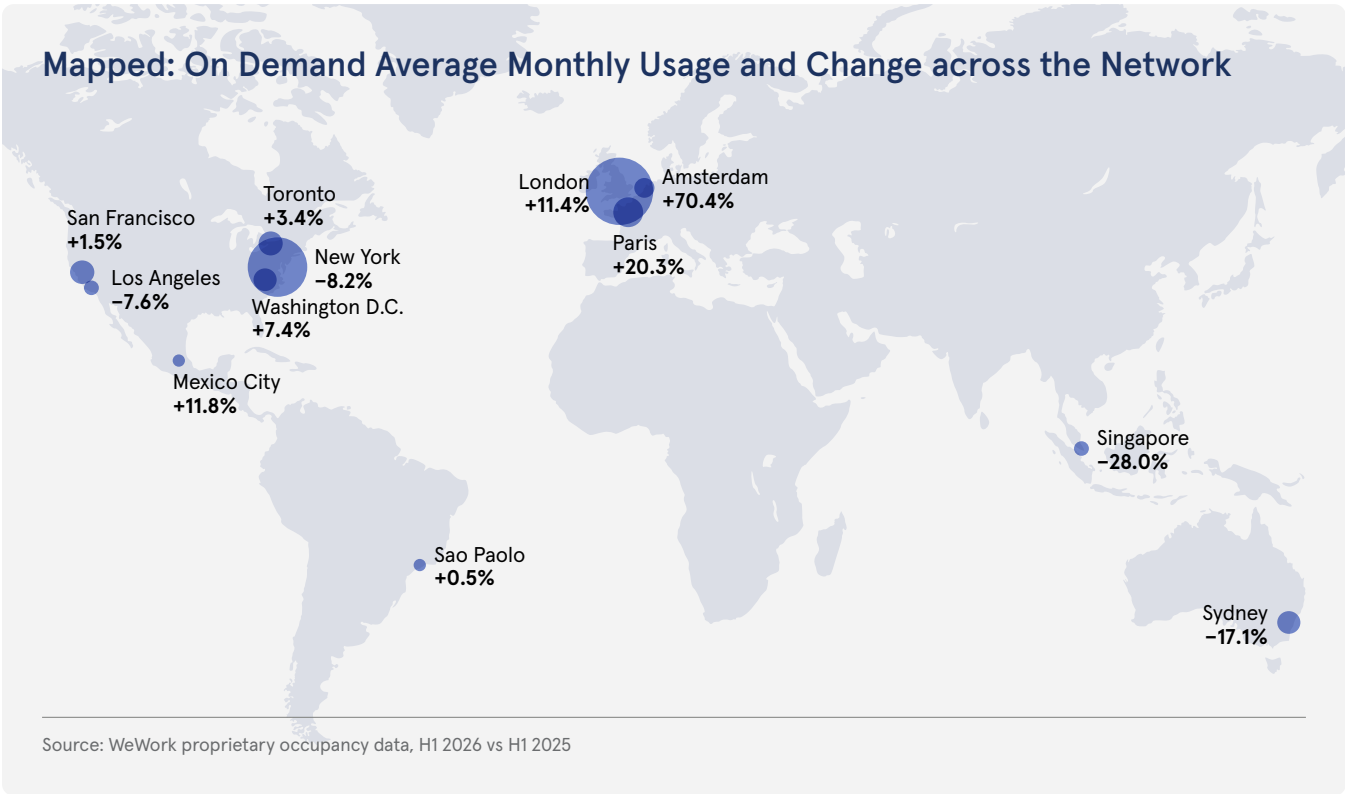
Around the World

[On Demand](#) activity grew across the network in the first half of 2026, averaging 82,241 reservations a month, up 20.4% from 68,279 a year earlier — roughly 14,000 more bookings each month. The increase comes as hybrid work settles in, with [most people now in the office two or three days a week](#) and booking space when they need it. **London** was the busiest market for it, averaging about 10,700 reservations a month, and it grew 11% year over year.

By Market

On Demand rose in 10 of the 17 markets that offer it. **EMEA** led: **Amsterdam** up 70%, **Berlin** 36%, **Paris** 20%, **London** 11%. London's rise looks smaller only in percentage terms: it still books more On Demand reservations than Amsterdam, Berlin and Paris combined, so it's a modest growth on paper but a significant one in reality.

Elsewhere, **Miami** grew 12%, **Mexico City** 12%, **Washington, D.C.** 7% and **Toronto** 3%. **Amsterdam** stands out on both counts: one of the few markets where member companies grew, and the biggest gainer in On Demand bookings, up 70%.



Flex as an Established Option

Fewer companies were in the network in the first half of 2026 than a year earlier, yet the space they hold has grown. The average footprint grew nearly 10%, rising in 14 of WeWork's 20 major markets, and 8 in 10 companies present in both years kept or expanded theirs, from small ventures to global enterprises.

Deal sizes and terms barely moved, so the growth came from companies adding seats and staying. Together with the growth in On Demand bookings, the picture is of companies treating flexible space as an established option rather than a temporary one: space they keep, and add to, as their needs change.

This report is a product of WeWork Business Intelligence, the company's data and research engine for understanding the complexities of the modern workplace. By combining global real estate trends with real-time market data, Business Intelligence gives leaders the evidence they need to navigate the changing world of work and deploy flexible, high-performing workspace strategies for the future.

Methodology

For this report, we analyzed internal membership data across our worldwide locations, comparing the first half of 2025 (January to June) with the first half of 2026.

We included physical offices, All Access memberships and Managed Solutions. For the company-level findings — footprint, retention, and deal metrics — we excluded All Access Pay-per-Use and On Demand, which are not memberships in the same sense.

We grouped companies by workforce size: enterprises (1,000 or more employees), medium businesses (500 to 999), and small businesses (fewer than 500).

Footprint figures reflect the average number of seats a company held per month. Deal size and term are based on new and renewal agreements signed in each period for committed, multi-desk memberships; month-to-month, dedicated desk and hot desk agreements are excluded.

All Access and On Demand figures are monthly average reservations, excluding cancelled ones.

Market-level findings cover WeWork's 20 major markets.



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