

# Flexible Office Market Survey 2026

---

The current state of flexible offices in major cities across Japan

March 18, 2026

**Xymax Research Institute**

# Survey Overview

In recent years, companies have been rethinking their employees' work styles and workplaces due to work style reforms and the spread of teleworking as a result of the COVID-19 pandemic. These developments have focused attention on workplaces that can be used flexibly in terms of time and location as needed ("flexible offices"), leading to rapid growth in their market.

Since 2020, Xymax Research Institute has been compiling and analyzing data on the number of flexible office locations and their floor area in order to quantitatively assess the flexible office market on an annual basis. This report, which covers the 7th survey, presents the aggregated results of data collected through December 2025.

The contents of this report are as of the time of writing. Xymax Research Institute Corporation does not guarantee their accuracy or completeness. This report may not be reproduced, cited, transmitted, distributed, or reprinted without prior permission of Xymax Research Institute Corporation.

## <Related surveys>

- *Flexible Office Market Survey 2025*, released on February 21, 2025

[https://www.xymax.co.jp/english/assets/pdf/news\\_research/20250221.pdf](https://www.xymax.co.jp/english/assets/pdf/news_research/20250221.pdf)

- *Classification of Flexible Offices by Type*, released on May 2, 2023

[https://www.xymax.co.jp/english/assets/pdf/news\\_research/20230502.pdf](https://www.xymax.co.jp/english/assets/pdf/news_research/20230502.pdf)

<b>Survey period</b>	October–December 2025
<b>Survey coverage</b>	<p>Workplace services provided by operators primarily to corporations and self-employed individuals under various forms of contract, including service contracts and fixed-term building leases, rather than a general office lease.</p> <p>* Excludes teleworking arrangements by karaoke stores, hotels, eating and drinking establishments, etc.</p> <p>* Includes one-person private booths.</p> <p>*Totals may not add up due to rounding.</p> <p>* The figures in this report are aggregates at the time of the survey. Data are added and updated on a daily basis.</p>
<b>Geographical coverage</b>	Tokyo 23 Wards and ordinance-designated cities with a population of more than 1 million (Yokohama, Osaka, Nagoya, Sapporo, Fukuoka, Kawasaki, Kobe, Kyoto, Saitama, Hiroshima, Sendai)
<b>Survey method</b>	Online research, inquiries and interviews with service operators

# Outline of Flexible Offices Covered by the Survey

Flexible offices encompass a diverse and segmented range of services and are referred to by a variety of names depending on the operator, such as rental offices, shared offices, serviced offices, satellite offices, and co-working offices. In this report, we use the term “flexible office,” which is the subject of the survey, as a generic term for workplaces provided by operators primarily to corporations and self-employed individuals under various forms of contract, including service contracts and fixed-term building leases, rather than a general office lease.

In this survey, we have also categorized flexible offices by office format into “multi-location,” which refers to a brand of flexible office that operates in multiple locations, and “single-location,” which refers to offices that operate independently, as shown in the following chart. The multi-location format is further subdivided into the “office type,” “one-person private booth type,” and the “rental meeting room type.”

Office format	Outline	
Multi-location	<ul style="list-style-type: none"> <li>• Mainly operated by <u>large operators, such as real estate companies (developers and service providers), and railway companies.</u></li> <li>• <u>Offices are operated in multiple locations under the operator's brand.</u></li> <li>• Facilities and services have been standardized for each brand.</li> <li>• There is a large network of offices spanning central business districts and the suburbs (regional areas).</li> <li>• Operates in large office buildings, train stations, and retail facilities.</li> </ul>	
	Office type	These tend to be a wide variety of facilities, including private booths and coworking spaces, and are used for everyday tasks such as individual work and team meetings. Some are used as exclusive company offices, while others are used by workers based on their location and equipment needs.
	One-person private booth type	Workspace booths packaged with the necessary equipment for solo work or web conferencing. They are primarily installed in easily accessible locations, such as major train stations, large office buildings, and common areas of retail facilities, and are expected to be used as touch-down points for short-term personal work before or after traveling to a different place.
	Rental meeting room type	Services that provide meeting rooms that are available by the hour. These are relatively large spaces used primarily for one-time occasions such as training, seminars, and events. They tend to provide extensive equipment and support services necessary for meetings.
Single-location	<ul style="list-style-type: none"> <li>• Mainly operated by <u>small operators</u> and individual building owners.</li> <li>• <u>Each office is operated independently.</u></li> </ul>	

# Understanding the Market from the Number of Flexible Office Locations in Major Cities Across Japan

There are 2,347 flexible office spaces in Greater Tokyo (Figure 1). In particular, there are 1,964 locations in Tokyo's 23 wards, with 1,278 of those located in the 5 central wards, indicating that supply is concentrated in central Tokyo where offices are clustered.

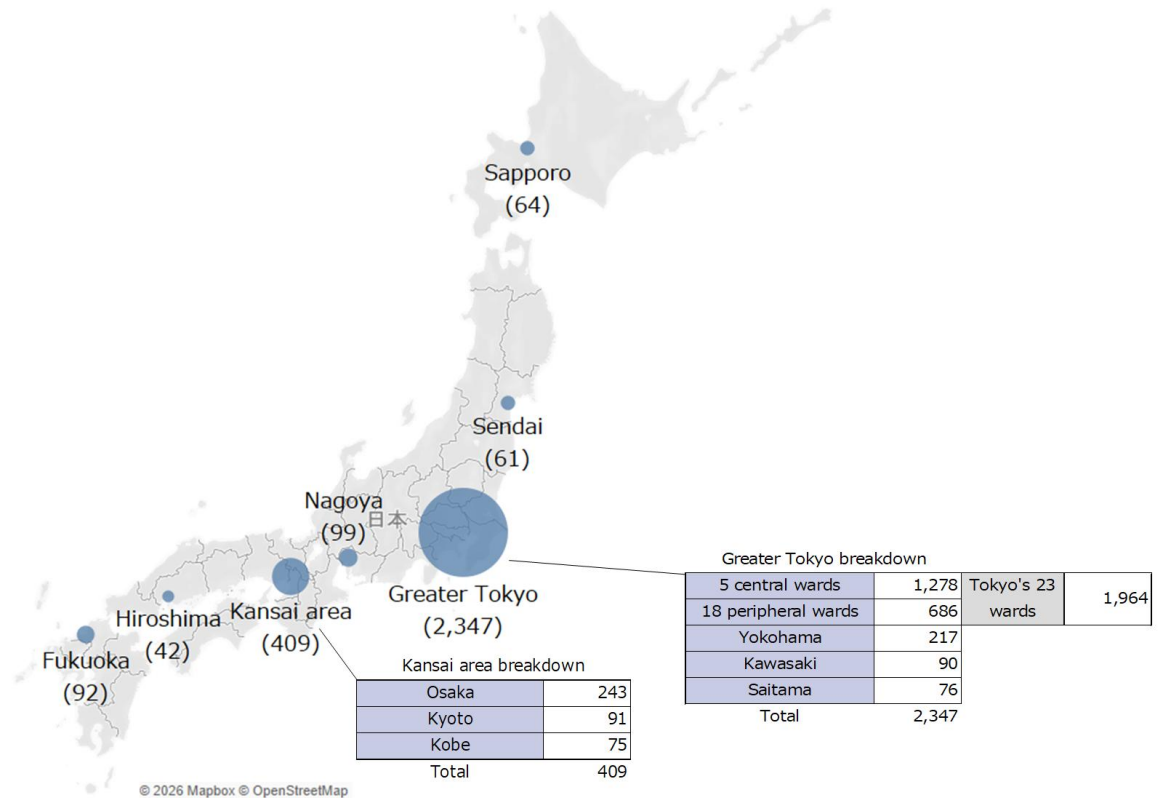
There are 409 flexible office spaces in the Kansai area, of which 242 are in Osaka City.

Dozens of locations have been identified in other major cities as well, indicating that the supply of flexible office spaces is expanding nationwide.

The total floor area (including estimates) of flexible office spaces in Tokyo's 23 wards (1,964 location) is about 342,000 tsubo (1 tsubo = approx. 3.3 sqm), accounting for about 2.6% of the office stock (13.23 million tsubo).\*1

\*1 Office Stock Pyramid 2026, published on January 14, 2026  
[https://www.xymax.co.jp/english/assets/pdf/news\\_research/20260114\\_Pyramid.pdf](https://www.xymax.co.jp/english/assets/pdf/news_research/20260114_Pyramid.pdf)

**Figure 1: Number of Flexible Office Locations in Major Cities Across Japan**



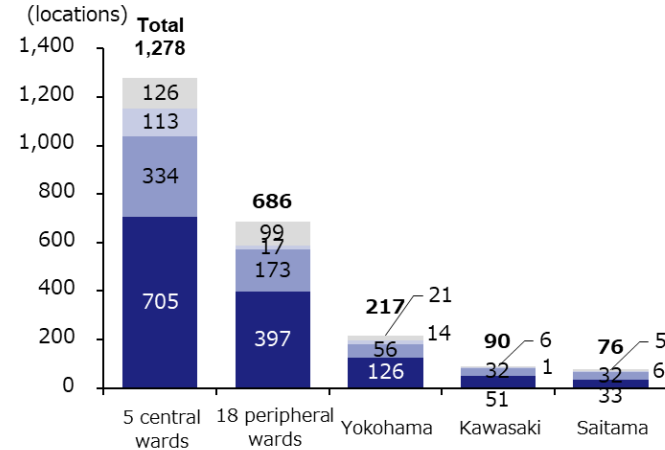
# Flexible Offices by Office Format in Different Areas of Greater Tokyo

In Greater Tokyo, the multi-location format accounts for around 90% of all locations in every district (Figure 2). In particular, the proportion of office-type multi-location facilities is high, accounting for more than 50% of the total in the four cities excluding Saitama.

The proportion of private booth-type units is relatively high in Kawasaki and Saitama.

The 5 central wards have the highest percentage of the rental meeting room type (8.8%). We assume that convenience of location is valued for gatherings of large numbers of people, and that there is a high demand in the 5 central wards, where offices are concentrated, to supplement large spaces that cannot be provided within companies' own offices.

**Figure 2: Number of Flexible Office Locations – Greater Tokyo, By Office Format**



Single-location		9.9%	14.4%	9.7%	6.7%	6.6%
Multi-location	Rental meeting room type	8.8%	2.5%	6.5%	1.1%	7.9%
	Booth type	26.1%	25.2%	25.8%	35.6%	42.1%
	Office type	55.2%	57.9%	58.1%	56.7%	43.4%
	<b>(Total)</b>	<b>90.1%</b>	<b>85.6%</b>	<b>90.3%</b>	<b>93.3%</b>	<b>93.4%</b>

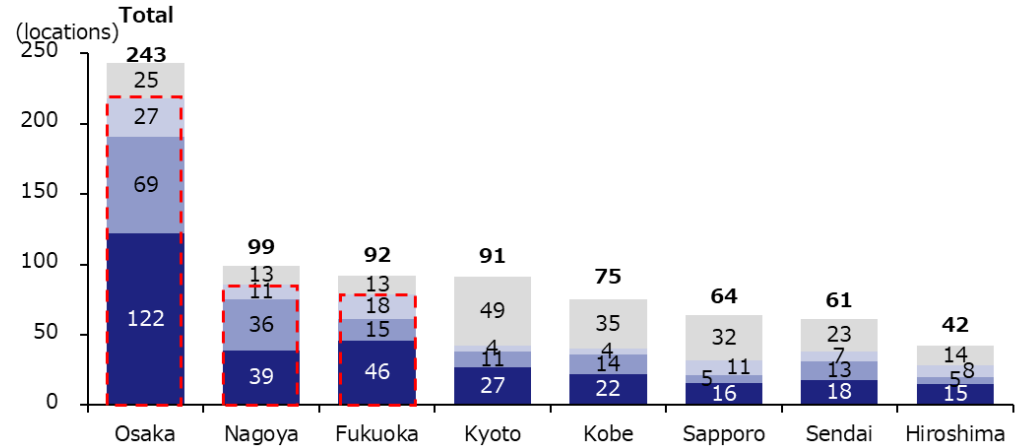
# Flexible Offices by Office Format in Areas Outside Greater Tokyo

Among the eight cities outside of Greater Tokyo, the cities with a relatively large office market, namely Osaka, Nagoya, and Fukuoka, have a higher proportion of the multi-location format than other cities, a similar trend to Greater Tokyo shown in Figure 2 (Figure 3). The proportion of multi-location office-type facilities in Osaka and Fukuoka is also 50% or higher, similar to many cities in Greater Tokyo. Compared to Osaka and Fukuoka, Nagoya has a slightly lower proportion of office-type units but a higher proportion of private booth-type units.

On the other hand, in cities other than Osaka, Nagoya, and Fukuoka, the proportion of single-location facilities is relatively high.

The proportion of rental meeting room-type facilities tends to be relatively high—nearly 20%—in Fukuoka, Sapporo, and Hiroshima. It can be inferred that there is a certain level of demand for rental meeting room-type facilities as venues for large-scale training sessions and events involving overnight stays, even outside Greater Tokyo.

**Figure 3: Number of Flexible Office Locations – Outside Greater Tokyo, By Office Format**



Single-location		10.3%	13.1%	14.1%	53.8%	46.7%	50.0%	37.7%	33.3%
Multi-location	Rental meeting room type	11.1%	11.1%	19.6%	4.4%	5.3%	17.2%	11.5%	19.0%
	Booth type	28.4%	36.4%	16.3%	12.1%	18.7%	7.8%	21.3%	11.9%
	Office type	50.2%	39.4%	50.0%	29.7%	29.3%	25.0%	29.5%	35.7%
	(Total)	89.7%	86.9%	85.9%	46.2%	53.3%	50.0%	62.3%	66.7%