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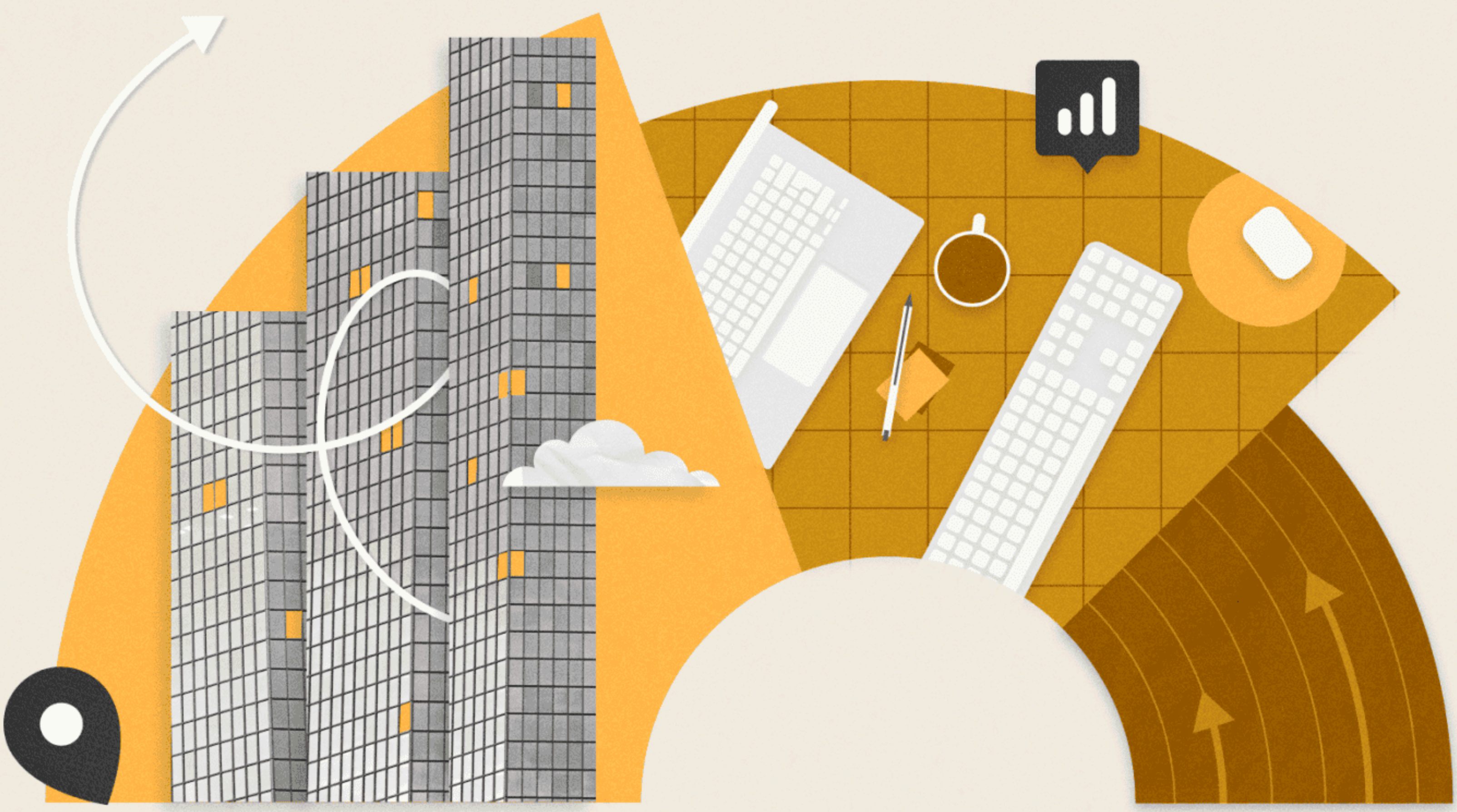
Report —— August 2026

2026 Office Recovery Trends Across Major U.S. Markets

See how the return-to-office is unfolding nationwide – and how local economies, hybrid schedules, and commute patterns are shaping the story market by market.



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Key Takeaways

- Nationwide office visits grew 6.0% YoY in H1 2026, bringing visits to 31.2% below 2019 levels – the narrowest H1 gap since the pandemic.
- Market performance diverged widely, with Miami sitting closest to its 2019 baseline (-11.5%). Denver, meanwhile, remained furthest behind, while Los Angeles (+13.0%) and San Francisco (+10.9%) posted the fastest year-over-year (YoY) gains.
- The hybrid workweek remained entrenched nationwide – but Friday office attendance varied widely by market. Miami and Dallas recorded the highest Friday shares in H1 2026, at 14.9% each, while Chicago posted the lowest, at 9.9%.
- Visits originating within five miles of the workplace were both the most recovered relative to 2019 and the fastest growing YoY.
- San Francisco led all markets in its shift toward close-by visits, while auto-centric Houston saw relatively little change in visit proximity.

Visits Rise, Markets Diverge

The return-to-office debate sometimes feels like it's stuck on repeat. Employers tighten attendance rules, workers push back – or look for loopholes – and around it goes.

But amid the noise, real progress is being made on the ground. In H1 2026, nationwide office visits grew 6.0% year over year (YoY) and the post-pandemic gap narrowed to its slimmest margin yet.

That national number, though, is an average of increasingly different stories. The same 6.0% contains a Miami sitting within striking distance of 2019, a San Francisco gaining momentum, and a Denver still trailing; a Dallas where roughly one in seven office visits happens on a Friday and a Chicago where it's barely one in ten; a New

York where almost half of all visits now come from within five miles and a Houston where it's just a quarter.

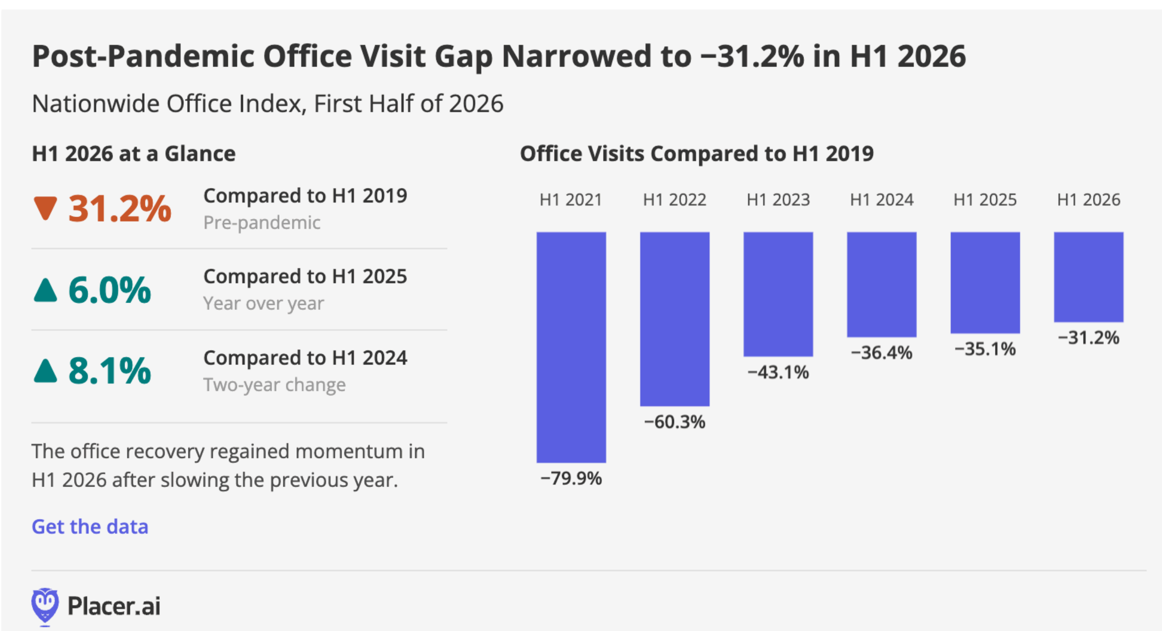
This report examines office recovery trends across 11 major U.S. markets, exploring where attendance is gaining fastest, and how hybrid workweeks and commute patterns differ by city.

Back in Acceleration Mode

Key Insights From this Section:

- Nationwide office visits grew 6.0% YoY in H1 2026, narrowing the gap with H1 2019 to 31.2%.

In H1 2026, nationwide office visits grew 6.0% YoY, a marked acceleration from the 1.9% YoY increase recorded in H1 2025. Total visits remained 31.2% below H1 2019 levels – the narrowest H1 gap since the pandemic began, and a notable improvement from -35.1% in H1 2025.



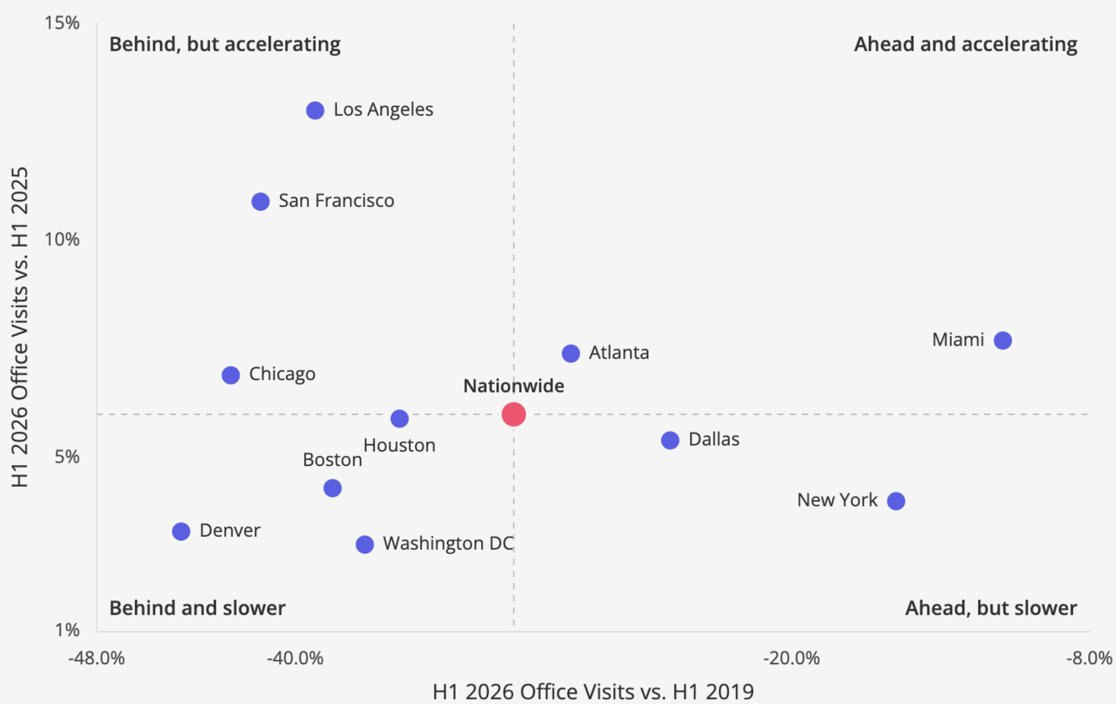
Local Realities Shape Regional Markets

Key Insights From this Section:

- Macro trends masked significant divergence across cities.
- Sunbelt markets Miami, Dallas, and Atlanta – along with New York – remained closest to their pre-pandemic office visit levels.
- West Coast markets posted the fastest YoY growth, while slower markets such as Washington, D.C. and Denver continued to recover at a more gradual pace.

Sunbelt Hubs Are Closest to 2019; West Coast Hubs Are Moving Fastest

Office Visits in H1 2026 vs. H1 2025 and H1 2019



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Sunbelt Leaders Ride a Corporate Relocation Wave

Miami remained the nation's standout market in H1 2026, sitting closest to its 2019 baseline (-11.5%) while also continuing to post above-average YoY growth (+7.7%). Although the broader metro area lost population last year, the city itself is growing, and an ongoing wave of corporate relocations likely helped draw more workers into local offices.

Atlanta and **Dallas** also outpaced the nationwide recovery baseline, buoyed by their own steady stream of corporate moves. And though Dallas' YoY growth came in slightly below the nationwide average at 5.4%, the Texas hub has less ground left to recover than most markets.

Finance-heavy New York Stays Ahead

After Miami, **New York** (-15.8% vs. 2019) sat closest to its pre-pandemic baseline of any market tracked in H1 2026. Office visits in the city grew another 4.0% YoY – below the +6.0% national rate, but consistent with a market building on substantial earlier gains. New York's advantage is supported by its concentration of finance firms, many of which were early adopters of strict return-to-office policies.

The West Coast Mounts a Late Surge

Los Angeles and **San Francisco** lagged nationwide recovery rates vs. 2019 in H1 2026 – but the two cities posted the fastest year-over-year gains in the nation. For LA (+13.0% YoY), much of that momentum reflects recovery from a bruising H1 2025, when January's wildfires and June's downtown unrest likely weighed on office visits. In San Francisco (+10.9% YoY), an influx of artificial intelligence startups and venture capital has fueled downtown leasing activity, helping pull workers back into a market that remained 41.4% below 2019 levels in H1 2026.

Every Market Moves Forward

All other markets analyzed – including **Boston**, **Chicago**, and **Houston** – also posted YoY growth in H1 2026, with Chicago outpacing the nationwide benchmark at 6.9% YoY. Even remote-friendly **Denver**, which ranked last in its recovery relative to 2019, recorded a 3.3% YoY increase. **Washington, D.C.**, meanwhile, posted the nation's slowest annual growth at 3.0% – perhaps due in part to a sluggish job market.

The Workweek Bends Locally

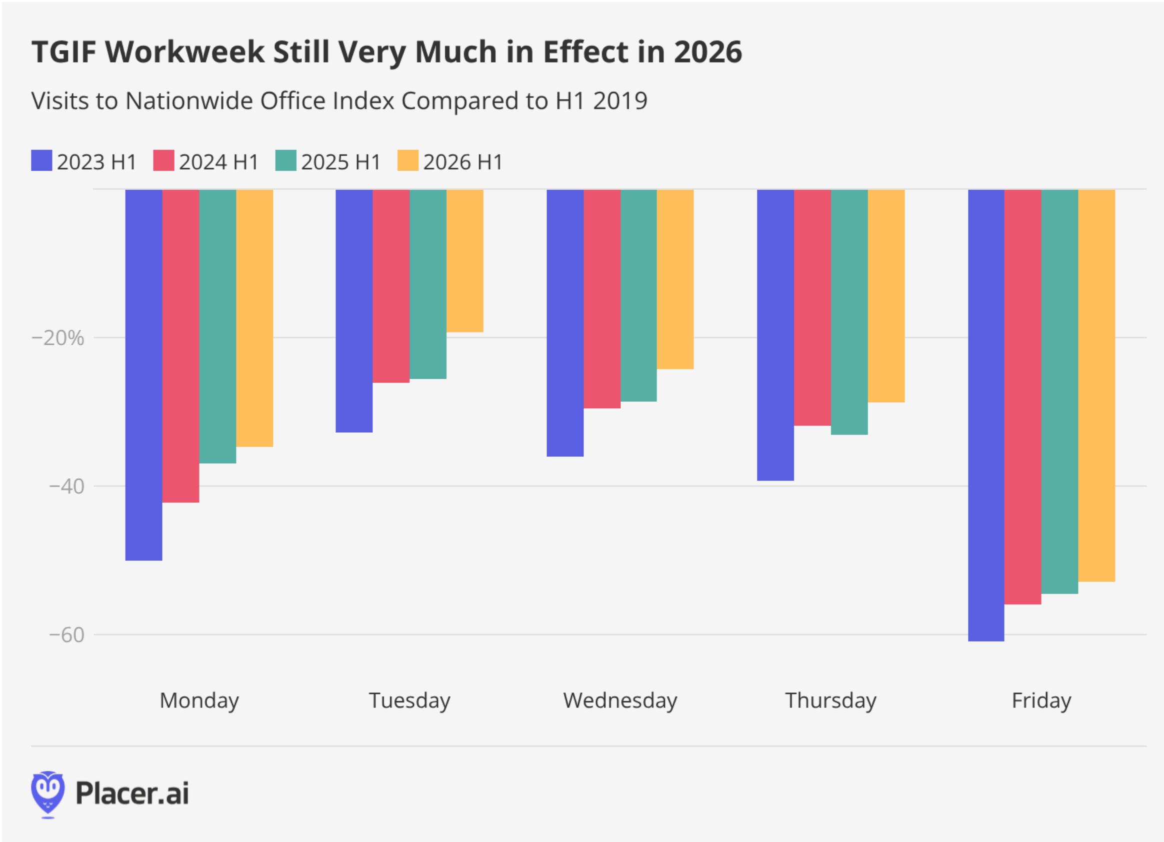
Key Insights From this Section:

- The nationwide office week remained concentrated around a midweek core, with Tuesday visits down just 19.3% compared to H1 2019.
- Friday office attendance varied considerably across markets.

The Hybrid Week Holds

Hybrid work was still the name of the game in H1 2026. Tuesday remained the busiest day of the week, sitting just 19.3% below 2019 levels. Wednesday (-24.2%) and Thursday (-28.7%) rounded out the mid-week core, while Monday (-34.7%) continued to lag and Friday remained down more than 50%.

And though every weekday's post-pandemic gap narrowed in H1 2026, the gains were uneven. Tuesday saw the biggest YoY jumps, followed by Wednesday and Thursday, while Monday and Friday saw only modest increases.



Friday's Fade Varies by Market

Here too, the precise contours of the hybrid week varied significantly by market.

In some cities, Friday attendance largely mirrored the broader recovery. **Miami** and **Dallas**, for example – both among the leading recovery markets – recorded the nation's highest Friday visit shares, with **Atlanta** also posting above-average Friday attendance. By contrast, markets with deeper overall visit deficits relative to 2019, including **Chicago**, **Boston**, and **San Francisco**, had some of the lowest Friday shares.

In other markets, however, Friday attendance appears to have reflected distinctly local conditions. **New York**, for example, combined a strong overall recovery with a relatively soft Friday share of just 11.9% – perhaps as commuters sought to avoid long regional-rail journeys heading into the weekend.

Houston, by contrast, posted a lower Friday share than its overall recovery might suggest, likely due in part to the energy industry's fondness for compressed "9/80" schedules that grant alternating Fridays off. That practice may also help explain why Houston's Friday share was already relatively low in H1 2019.

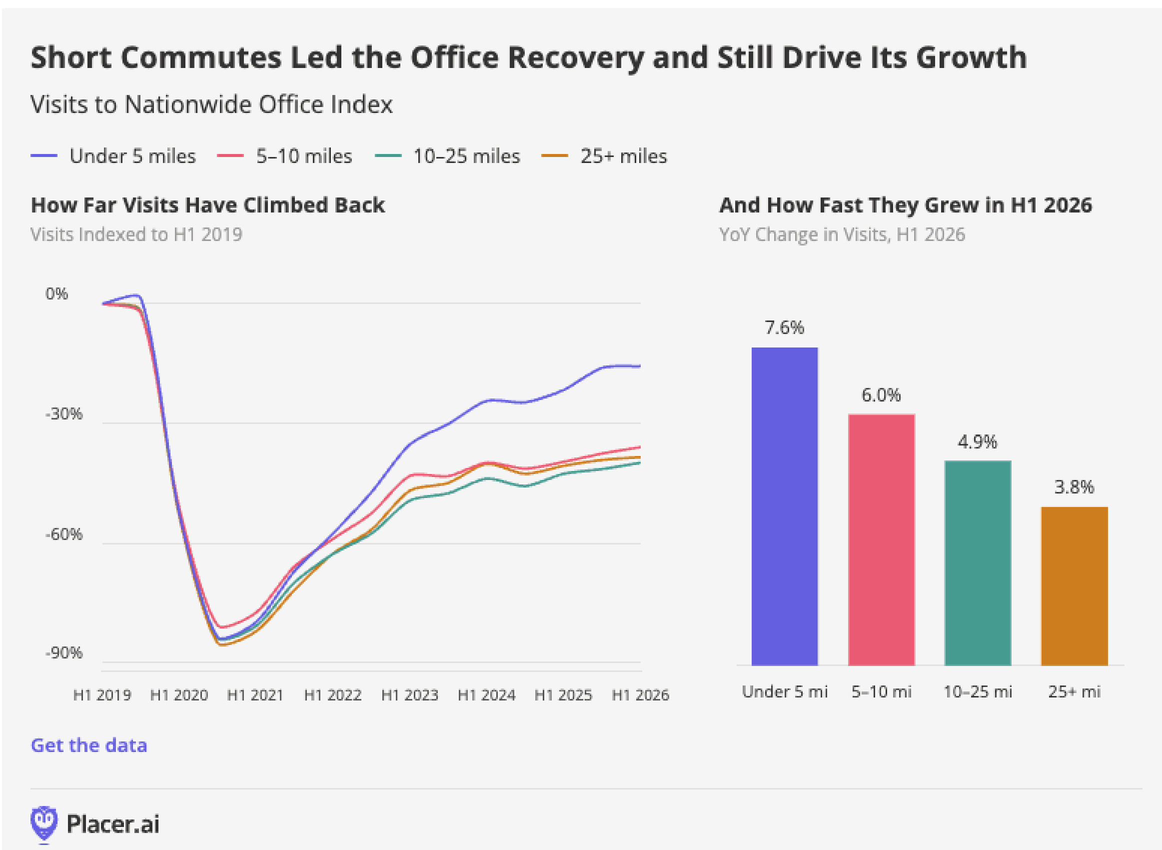
The Power of Proximity

Key Insights From this Section:

- Visits originating within five miles of the office continued to recover fastest and posted the strongest YoY growth in H1 2026.
- Dense markets such as San Francisco, New York, and Chicago saw the greatest shift toward nearby visits, while sprawling Houston saw relatively little change.

Short Commutes Lead the Recovery

Nationwide, short commutes remained a key driver of the office recovery in H1 2026, extending a trend seen in earlier years.



In H1 2026, these nearby visits also posted the fastest YoY growth – likely reflecting more frequent office attendance among employees with shorter, easier commutes.

Urban Density Drives Nearby Visits

Once again, however, the strength of this shift varied considerably by market.

San Francisco led both in its share of close-by visits, at 48.1%, and in the growth of that share since H1 2019. The city's AI boom likely played a role here as well – the young startups driving the current leasing wave tend to favor in-person work and cluster in neighborhoods like Hayes Valley's "Cerebral Valley," where employees often live within walking distance of their desks.

New York (45.3%) and **Chicago** (41.5%) also ranked near the top. In these dense transit cities, urban-core residents account for a growing share of office traffic, while visits from suburban commuters remain more subdued. By contrast, the geography of office visits changed relatively little in sprawling, auto-centric **Houston**.

All News is Local

Halfway through 2026, the return-to-office push is still very much under way. New mandates keep coming into effect – a majority of Fortune 100 companies now require five days a week at a desk – and badge swipes have quietly become a performance metric.

But the national trend tells only part of the story. The pace and shape of the recovery still vary widely by market, reflecting differences in commuting patterns, urban form, industry mix, and local office policies. The next phase of the office recovery is therefore unlikely to follow a single national script – attendance may continue to rise broadly, but where it rises fastest will depend increasingly on the particulars of each market.