

Metropolitan Areas Office Demand Survey Autumn 2025

<Detailed Report>

Exploring hybrid work implementation; meeting space shortages and internal communication pose challenges

January 29, 2026

Xymax Research Institute

Survey Overview

The hybrid work model of commuting and telework, which has become widespread due to the COVID-19 pandemic, is becoming established as a permanent way of working in the future. What kind of workplace is suitable for this new way of working?

Since autumn 2016, Xymax Research Institute has conducted a semi-annual survey on the actual office usage and working styles of companies, continuously analyzing the relationship with office demand. This report covers the results of the 19th survey.

Survey period	November 25–December 7, 2025
Target respondents	59,294 companies in total that include the following: <ul style="list-style-type: none"> • Tenants of office buildings managed by the Xymax Group • Companies subscribing to ZXY, a satellite office service for corporate customers • Client companies of XYMAX INFONISTA Corporation
No. of valid responses	1,555 (Aggregated in office units; therefore, answers from different offices of the same company are treated as separate answers.)
Geographical coverage	Nationwide (Tokyo; Osaka City, Osaka Prefecture; Nagoya City, Aichi Prefecture; Fukuoka City, Fukuoka Prefecture; Kanagawa Prefecture; Saitama Prefecture and Chiba Prefecture)
Survey method	Email

The percentage mix in the charts contained in this report is rounded to the first decimal place and, therefore, may not add up to 100%.

Attributes of respondent companies

Sector	Type of office		Location of office		Size of office under lease (1 tsubo=3.33 sqm)		Average employee age		Listed/ not listed	
	Agriculture and forestry	3 (0.2%)	Head office	1,000 (64.3%)	Less than 30 tsubo	311 (20.0%)	20-29	23 (1.5%)	Listed	234 (15.0%)
	Fisheries	0 (0.0%)	Branch office	361 (23.2%)	30-49 tsubo	198 (12.7%)	30-39	486 (31.3%)	Not listed	1,285 (82.6%)
	Mining and quarrying of stone and gravel	0 (0.0%)	Sales office	132 (8.5%)	50-99 tsubo	253 (16.3%)	40-49	813 (52.3%)	Don't know	36 (2.3%)
	Construction	88 (5.7%)	Sub-office	23 (1.5%)	100-199 tsubo	222 (14.3%)	50-59	179 (11.5%)		
	Manufacturing	249 (16.0%)	Call center	6 (0.4%)	200 tsubo or more	268 (17.2%)	60 or above	45 (2.9%)		
	Electricity, gas, heat supply and water	8 (0.5%)	Computer room	1 (0.1%)	No answer	303 (19.5%)	No answer	9 (0.6%)		
	Information and communications	262 (16.8%)	Other	32 (2.1%)						
	Transport and postal services	27 (1.7%)	Tokyo's 23 wards	879 (56.5%)						
	Wholesale and retail trade	219 (14.1%)	Osaka City	188 (12.1%)						
	Finance and insurance	44 (2.8%)	Nagoya City	131 (8.4%)						
	Real estate and goods rental and leasing	80 (5.1%)	Fukuoka City	73 (4.7%)						
	Scientific research, professional and technical services	132 (8.5%)	Other	284 (18.3%)						
	Accommodations, eating and drinking services	12 (0.8%)								
	Living-related and personal services and amusement services	13 (0.8%)								
	Education, learning support	28 (1.8%)								
	Medical, health care and welfare	27 (1.7%)								
	Compound services	17 (1.1%)								
	Services, n.e.c.	299 (19.2%)								
	Governments and agencies (Excl. those classified elsewhere)	6 (0.4%)								
	Unclassifiable	41 (2.6%)								
Number of employees	Less than 100	801 (51.5%)								
	100-999	486 (31.3%)								
	1,000 or more	260 (16.7%)								
	Unknown	8 (0.5%)								

Main Findings

1. Outlook of office demand (from P. 4)

- The percentage of companies with an increase in office occupants over the past year (27.7%) exceeded the percentage of companies with a decrease (12.2%).
- In terms of changes in office size over the past year, “Expansion (actual + potential)” (12.9%) outweighed “Downsizing (actual + potential)” (6.2%). The DI remained positive at 6.7.
- In terms of future office size (up to 2–3 years ahead), 18.0% of the companies said they “want to expand,” more than those who said they “want to downsize” (5.5%).

2. Factors affecting office demand (from P.15)

- The percentage of companies with a coming-to-office ratio of “100% (Come to office full time)” was 22.3%. The remaining 77.5% continue to adopt telework. Since the Spring 2023 survey, there has been no significant change in how often employees came to the office, with the hybrid model with a higher proportion of employees coming to the office (60–99%) accounting for roughly half (47.0%).
- When comparing coming-to-office ratios over the past year, “No change” was the most common response at 77.2%. Regarding future coming-to-office ratio intentions, “Will not change” (64.6%) also accounted for the majority.
- 32.4% of the companies felt their office was small, exceeding the percentage that felt it was large (13.3%).

3. Work styles and the workplace (from P. 25)

- In terms of spaces that companies want to add or introduce to their main office in the future, there was a strong need for “Booth/private room for remote meetings” (16.9%) and “Meeting room (private)” (15.6%), suggesting that office layouts for ABW tailored for hybrid work with a higher proportion of coming to the office will become increasingly available.
- The top problem or challenge concerning the main office was “Lack of meeting rooms or space for remote meetings” (57.7%), significantly outweighing other items. Additionally, among groups that identified a shortage of meeting rooms as a challenge, the lack of meeting rooms for 1 person (booth/private room for remote meetings) (47.5%) and for 2-4 persons (46.9%) was particularly pronounced.
- The availability of work-from-home policies and satellite offices was 45.1% and 29.7%, respectively, showing no significant change from the Autumn 2024 survey conducted one year ago.
- When asked whether they believe internal communication (both face-to-face and online) has become more active, approximately 60% of respondents answered “(Somewhat) agree,” while 33.4% answered “(Somewhat) disagree.”. The most frequently cited specific challenge was “Communication tends to be insufficient online” (65.1%).
- 28.2% of the companies said they were “already implementing” human capital management initiatives. Combined with the percentage of companies that “intend to implement in the future,” these companies accounted for 54.3%.

1. Outlook of office demand

1. Changes over the past year
2. Future intentions

1.1. Changes over the past year

Number of office occupants over past year: “Increased” (27.7%) outweighed “Decreased” (12.2%), both remaining flat

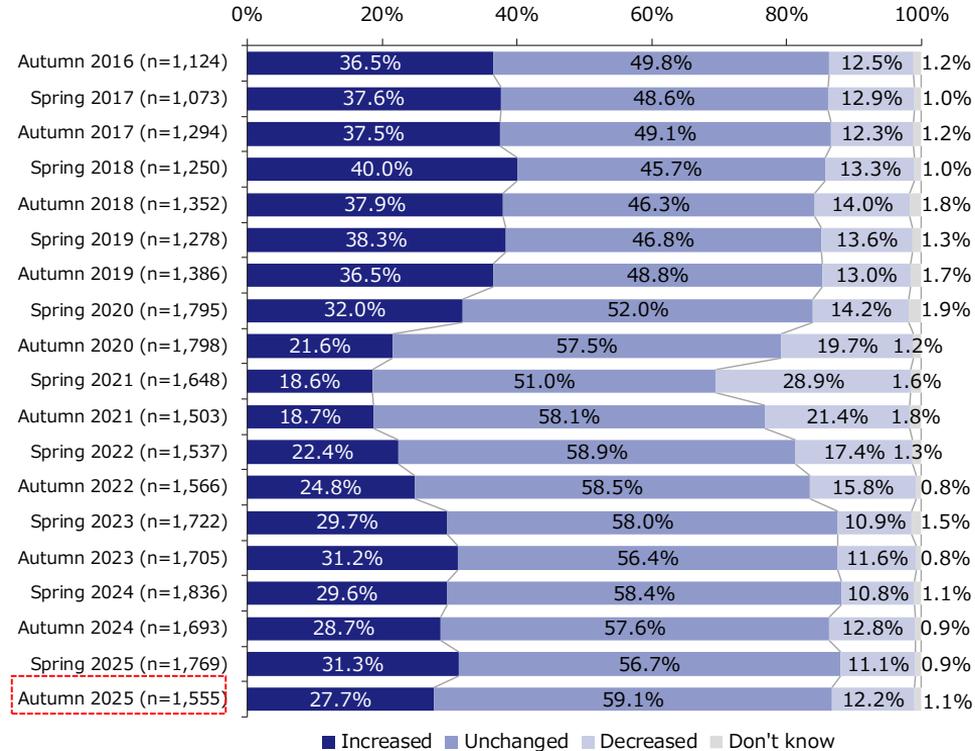
Figure 1 (red frame) shows changes in the number of office occupants* over the past year.

The percentage of companies with an increase in office occupants was 27.7%, exceeding the percentage of companies with a decrease (12.2%).

The percentage of increases, which had been rising since hitting bottom in the Spring 2021 survey, and that of decreases, which had been declining since peaking in the Spring 2021 survey, have remained largely unchanged.

*Number of office occupants: The number of people belonging to the office, regardless of whether they come to the office or not

Figure 1: Change in Number of Office Occupants



■ Increased ■ Unchanged ■ Decreased ■ Don't know

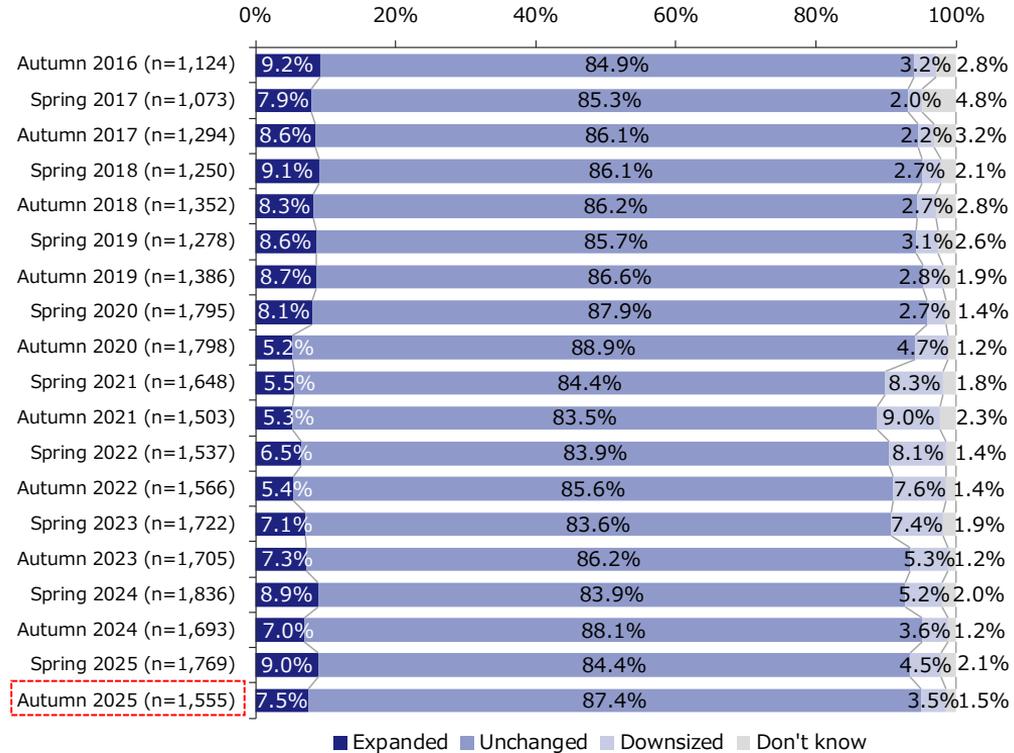
(All respondents)

Companies downsizing their office continue to decrease

In terms of changes in office size over the past year, the percentage of companies that “expanded” their office size was 7.5%, while the percentage of companies that “downsized” was 3.5% (Figure 2 (red frame)).

Continuing from the previous survey, “Expanded” outweighed “Downsized,” but the percentages declined slightly. “Downsized,” in particular, continued on a declining trend since peaking in the Autumn 2021 survey.

Figure 2: Change in Office Size



(All respondents)

1.1. Changes over the past year

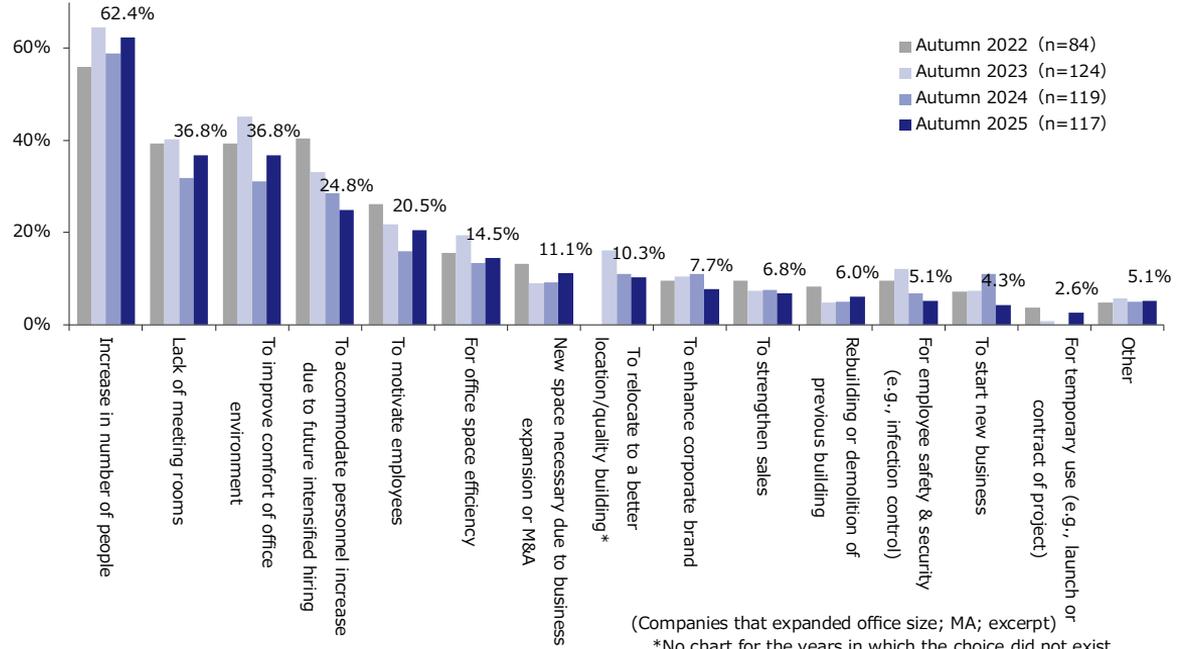
Top reasons for office size expansion: “Increase in number of people,” “Lack of meeting rooms”

The most popular reason for office size expansion was “Increase in number of people” (62.4%), the same as in previous surveys (Figure 3).

This was followed by “Shortage of meeting rooms” (36.8%) and “To improve comfort of office environment” (36.8%).

On the other hand, “To accommodate personnel increase due to future intensified hiring” (24.8%) has been declining consistently since the Autumn 2022 survey.

Figure 3: Reason for Office Size Expansion

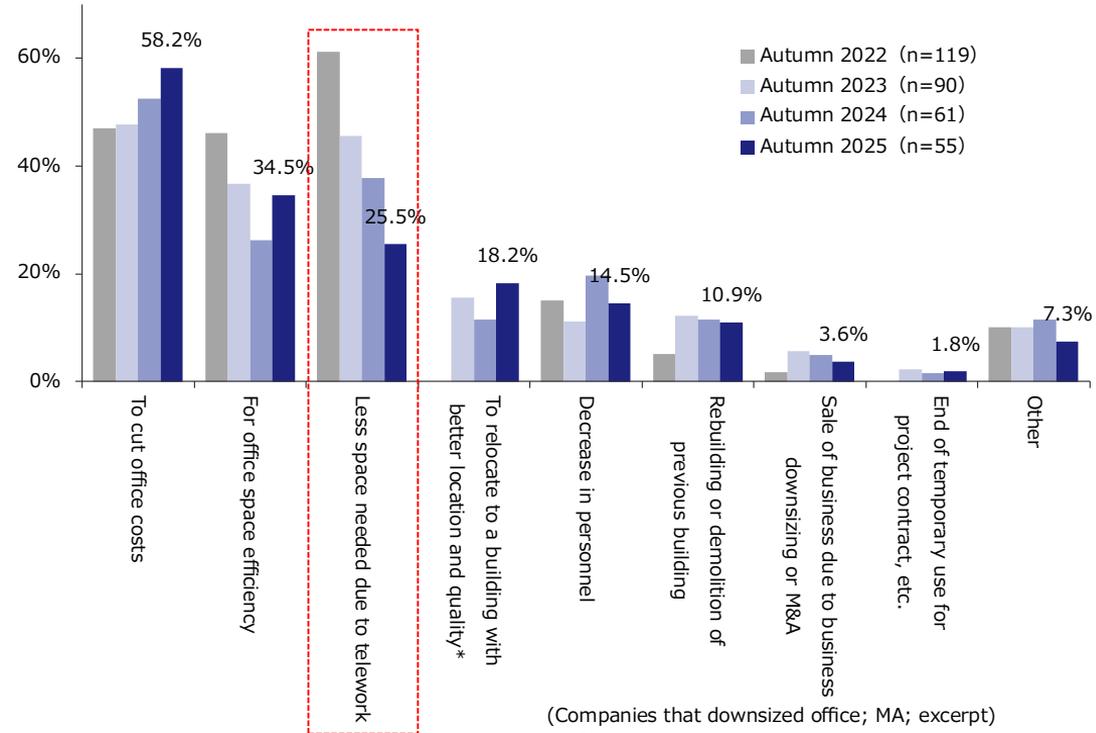


Smaller percentage of “Less space needed due to telework” as reason for downsizing

The top reason for office downsizing was “To cut office costs” (58.2%) (Figure 4).

The declining trend in the percentage of “Less space needed due to telework,” the third most popular reason, since the Autumn 2022 survey suggests that the adjustment of office size to accommodate new work styles that emerged in response to the COVID pandemic has subsided.

Figure 4: Reason for Office Downsizing



(Companies that downsized office; MA; excerpt)

*No chart for the years in which the choice did not exist.

1.1. Changes over the past year

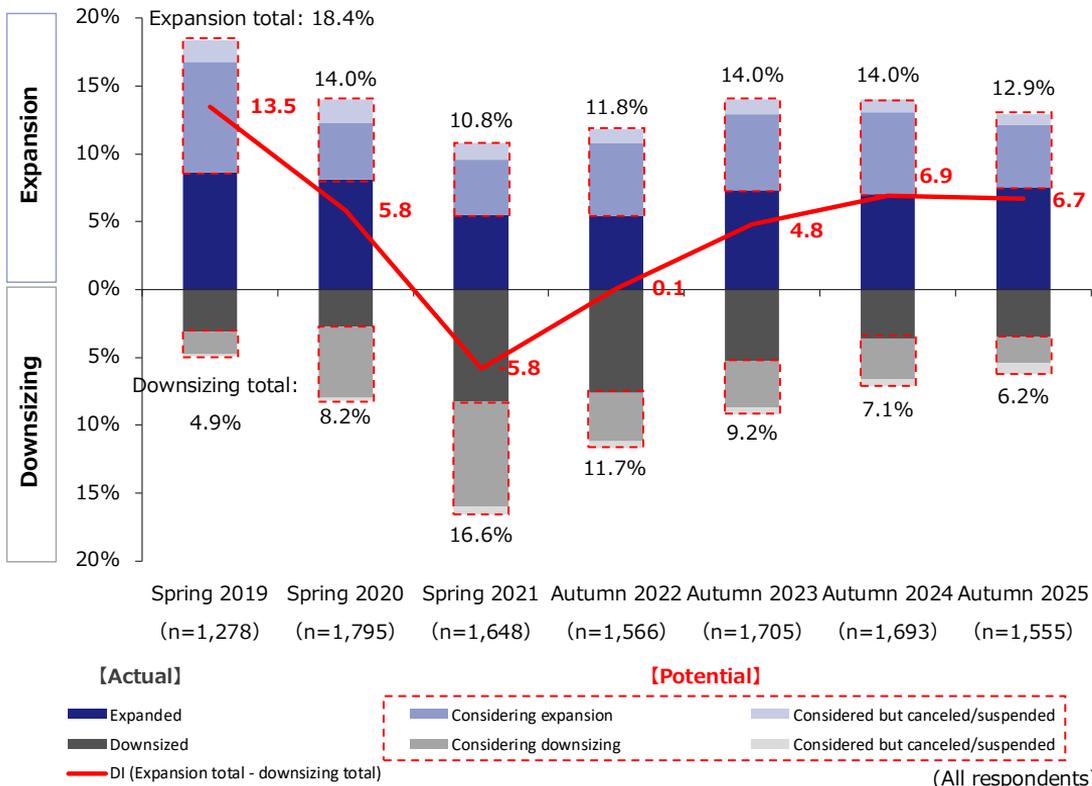
Actual (and potential) changes in office size: Expansion significantly exceeded downsizing; DI grew in positive direction

Even if office size had remained unchanged over the past year, when we add the percentage of “Considering expansion” and the percentage of “Considered but cancelled or suspended” as the percentage of “Potential expansion,” the total “Expansion (actual + potential),” which had been on an upward trend after hitting bottom in the Spring 2021 survey, remained unchanged since the Autumn 2023 survey at 12.9% (Figure 5).

The percentage of “Downsizing (actual + potential)” (6.2%) continued to decline since peaking in the Spring 2021 survey.

Expansion also outweighed downsizing in actual performance, as shown in Figure 2. When potential expansion is added, the gap widens further, as indicated by the DI remaining in positive territory at 6.7. The trend has shifted from downsizing following the onset of the COVID-19 pandemic to sustained expansion.

Figure 5: Actual + Potential Change in Office Size Over Past Year



(All respondents)

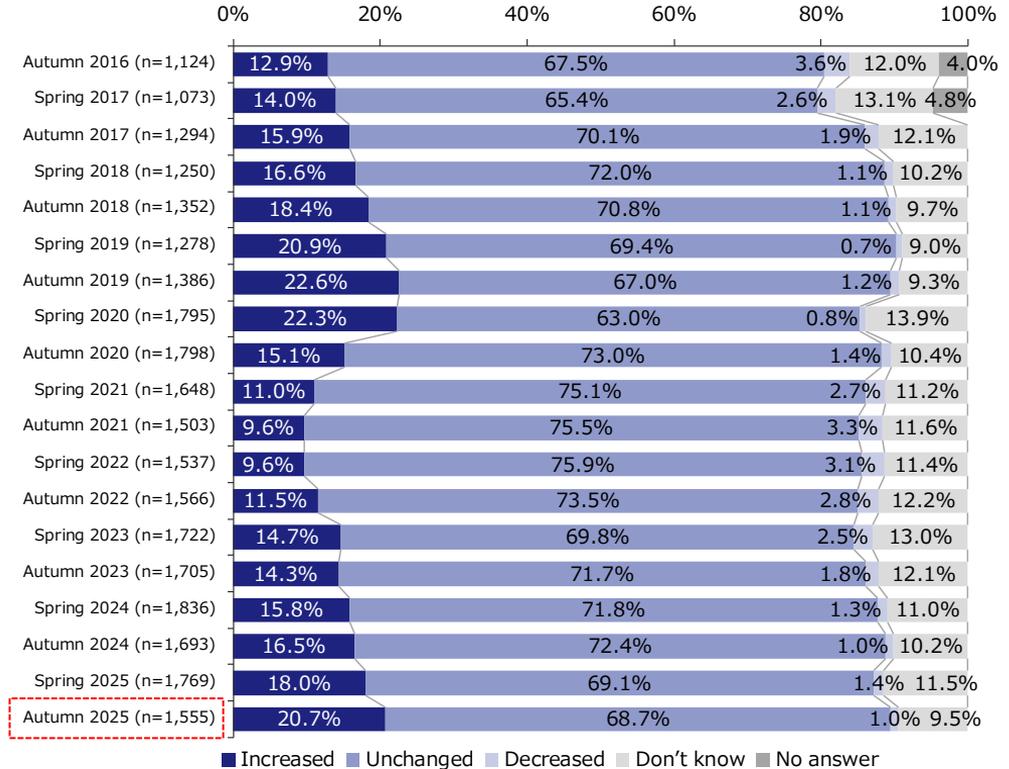
1.1. Changes over the past year

20.7% of companies reported increase in rent per tsubo, continuing an upward trend over the years

In terms of changes in rent per tsubo, 20.7% of companies said it “increased,” more than those that said it “decreased” (1.0%), indicating an upward trend in rent (Figure 6 (red frame)).

Looking at the trend over time, the percentage of companies that said rent “increased” has been on the rise since the Autumn 2021 survey.

Figure 6: Change in Rent per Tsubo



(All respondents)

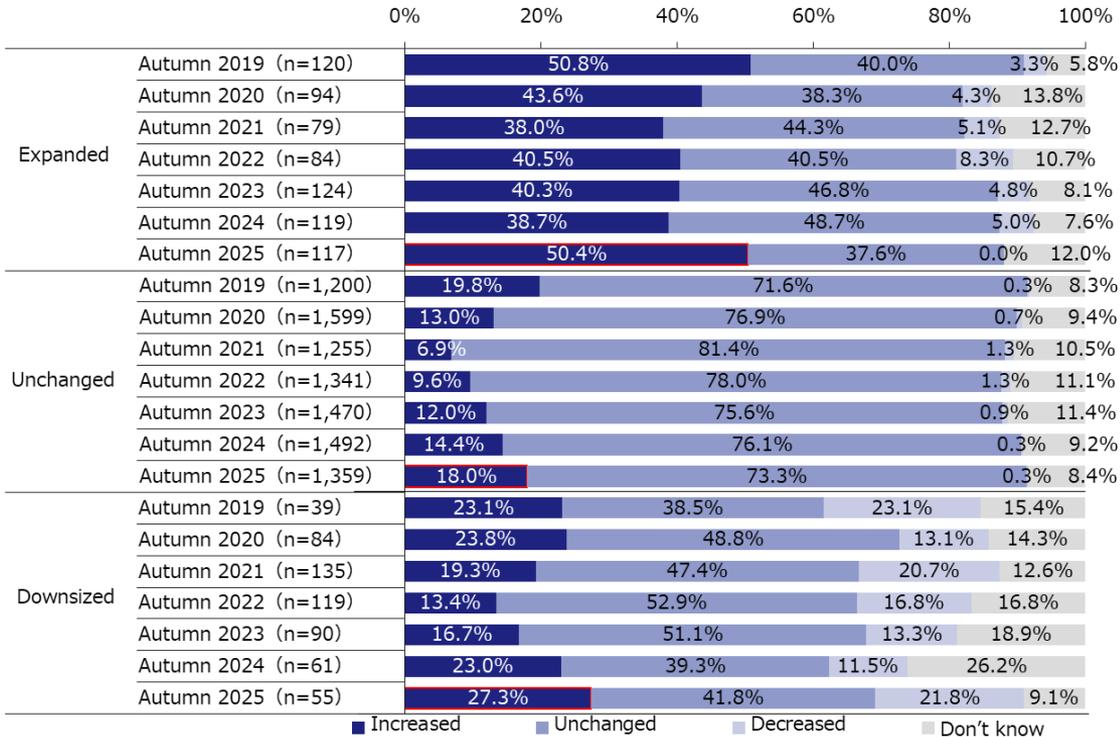
1.1. Changes over the past year

18.0% of companies with no change in office size reported increase in rent per tsubo

When examining changes in rent per tsubo by changes in office size, the percentage of companies that reported an increase in rent per tsubo was 50.4% among companies that “expanded” their office size and 27.3% among companies that “downsized,” both exceeding the percentage reporting a decrease (Figure 7).

Among the companies with “unchanged” office size, 18.0% responded that their rent per tsubo “increased.” Given the rise in market rent levels, we believe that a certain number of cases occurred where rents increased upon contract renewal, even for tenants who did not relocate.

Figure 7: Change in Rent per Tsubo – By Change in Office Size



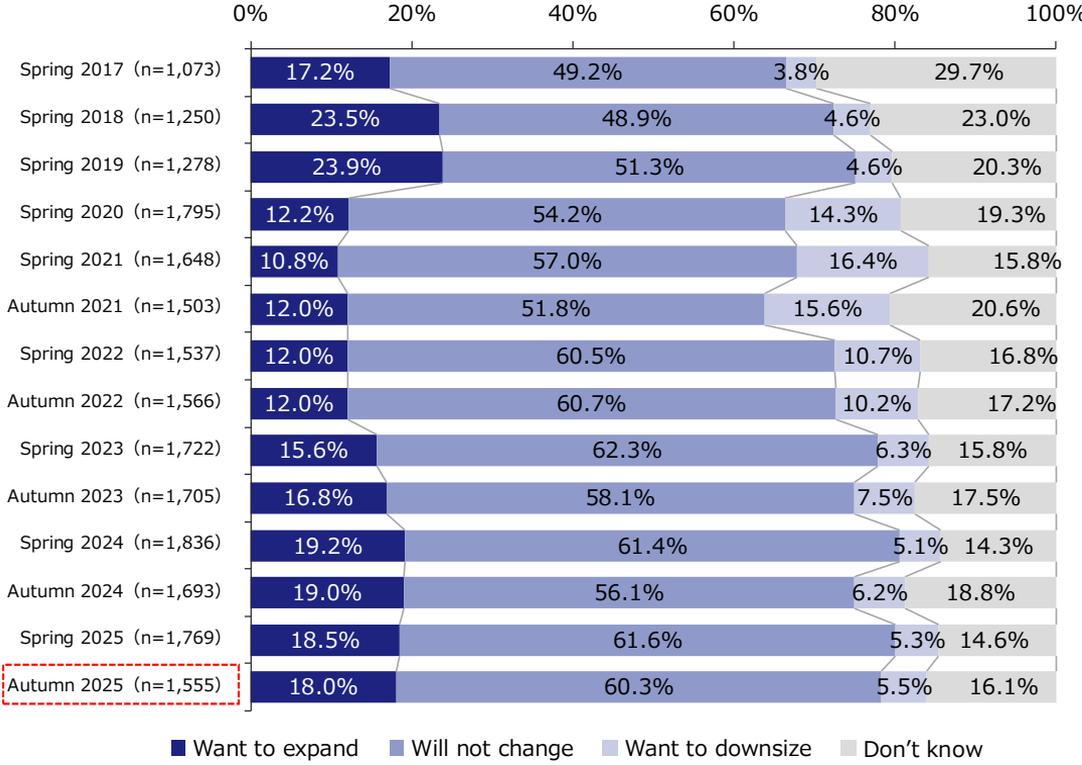
(All respondents; excerpt)

Intentions to expand unchanged after continued rise since Spring 2021

In terms of future office size (up to 2–3 years ahead), 18.0% of the companies said they “want to expand,” more than those who said they “want to downsize” (5.5%) (Figure 8 (red frame)).

When compared over time, the percentage of companies that “want to expand,” which had been increasing since hitting bottom in the Spring 2021 survey, remained unchanged and has not returned to pre-pandemic levels (i.e., prior to the Spring 2019 survey).

Figure 8: Future Change in Office Size



(All respondents)

1.2. Future intentions

Intentions to expand significantly outweigh intentions to downsize regardless of office location or number of employees

Here, we compare companies' future intentions for office size by attribute. By office location, the percentage of companies that “want to expand” significantly exceeded those that “want to downsize” across all groups. However, compared to past surveys, the percentage of companies in Nagoya City and Fukuoka City that “want to expand” has decreased (Figure 9).

By number of employees, the percentage of companies that “want to expand” also exceeded those that “want to downsize” across all groups (Figure 10). However, among large companies with 1,000 or more employees, the proportion those that “want to expand” (16.5%) decreased by 3.6 ppts compared to the Autumn 2024 survey, a significantly larger decline than in other groups.

Figure 9: Future Change in Office Size – By Office Location

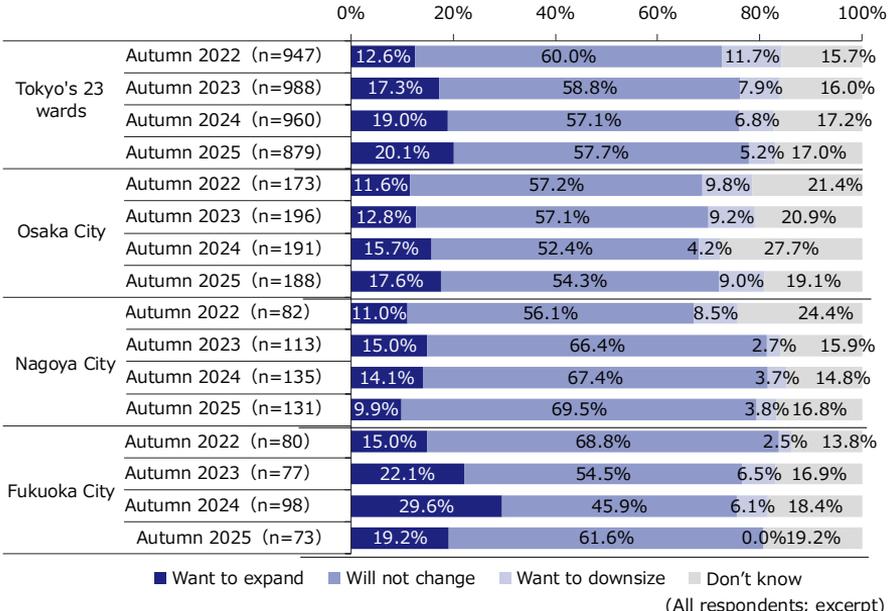
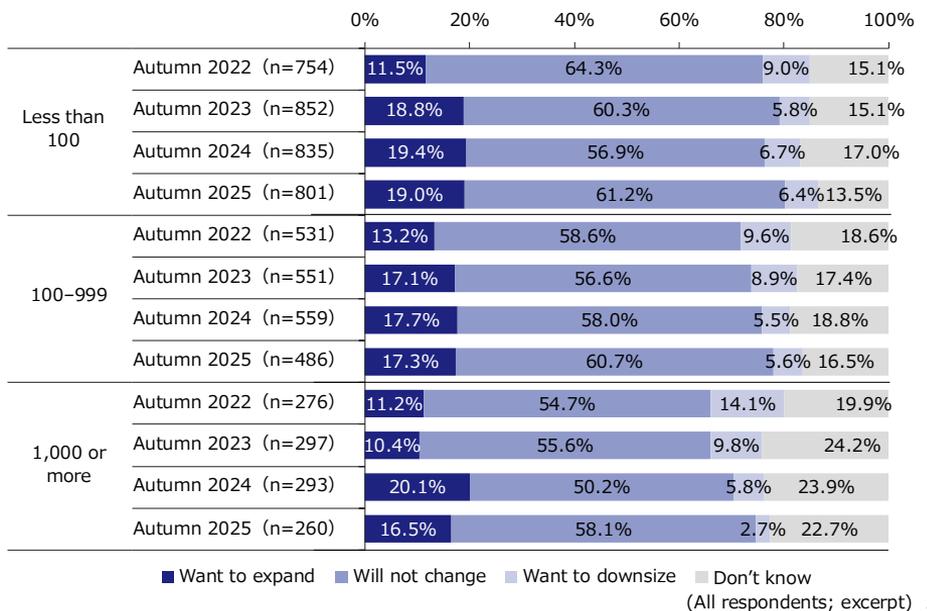


Figure 10: Future Change in Office Size – By Number of Employees



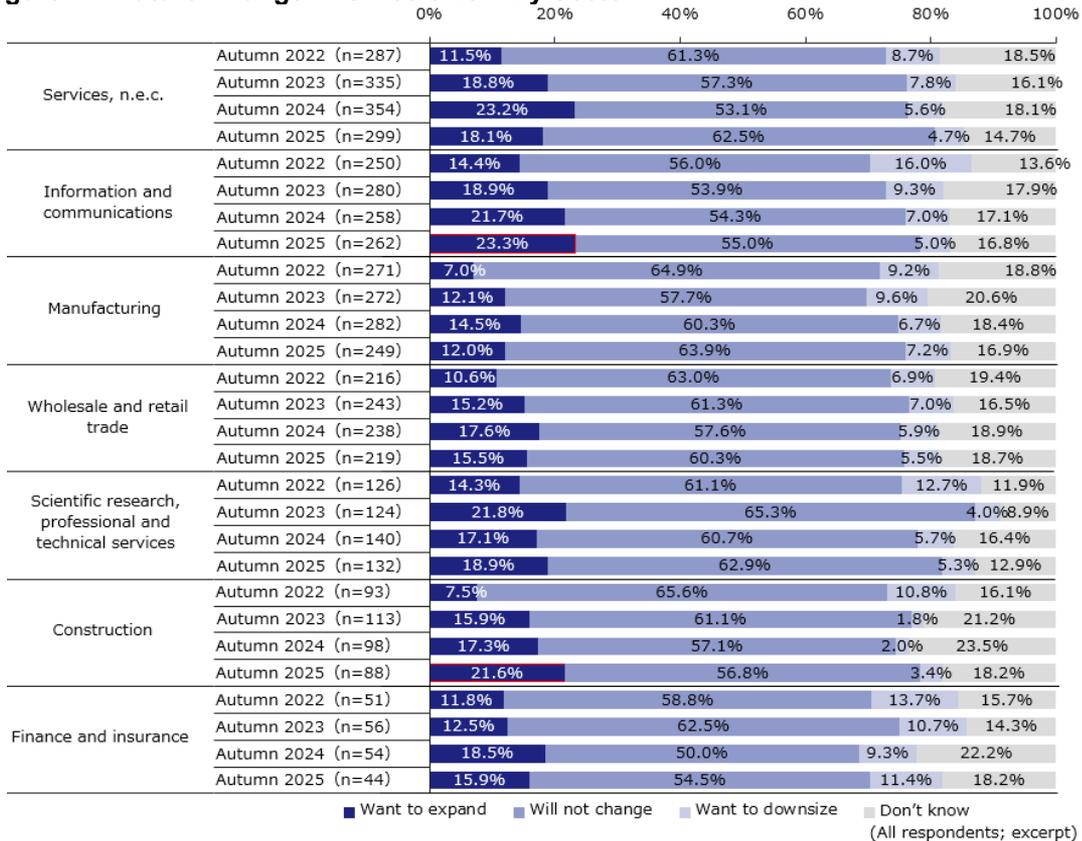
1.2. Future intentions

Over 20% of companies in the information and communications and construction sectors “want to expand,” an increasing trend over time

When looking at future intentions by sector, “Want to expand” also outweighed “Want to downsize” across all sectors (Figure 11).

In particular, the percentage of “Want to expand” was more than 20% in the information and communications and construction sectors, showing an increasing trend over time.

Figure 11: Future Change in Office Size – By Sector



2. Factors affecting office demand

1. Coming-to-office ratio
2. Percentage of desks, perception of office size, business sentiment

Around 80% of companies continue to adopt telework

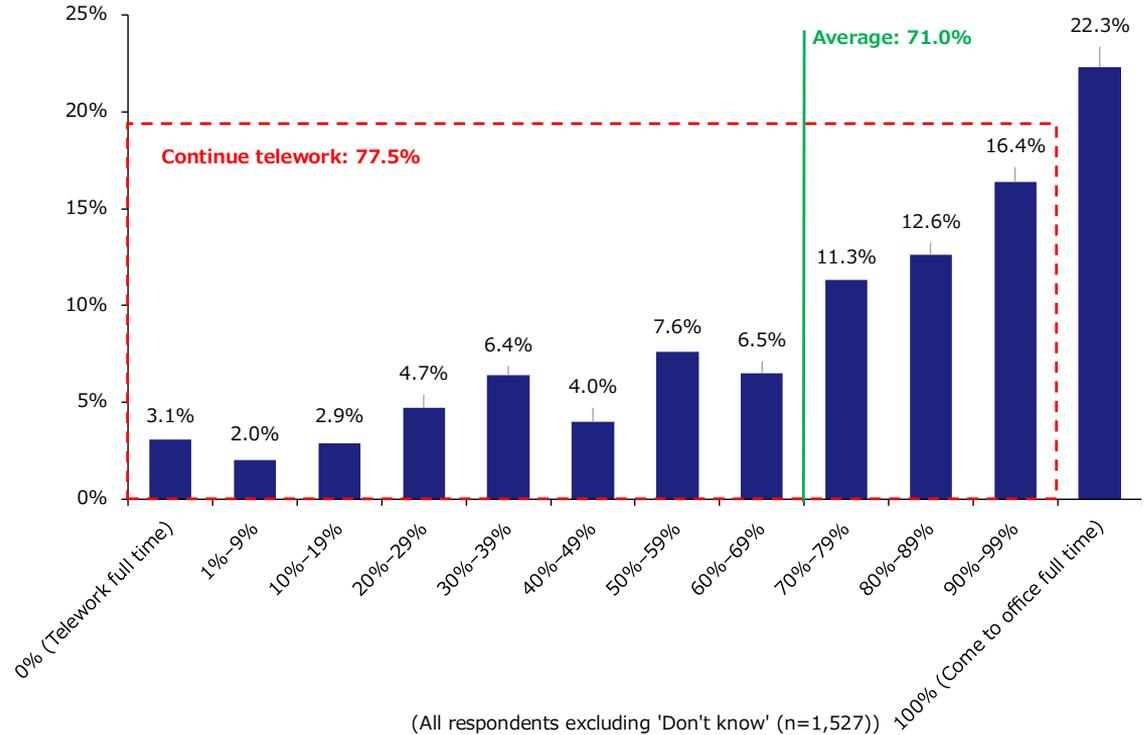
With a coming-to-office ratio of 100% meaning all employees came to the office, we asked companies' current average coming-to-office ratio (Figure 12).

At the time of the survey, 22.3% of the companies reported "100% (Come to office full time)," indicating that the remaining 77.5% continued to adopt telework to varying degrees.

The average value* was 71.0%.

*The average value was calculated by adopting the central number within the range indicated by each choice: 5% for "1%–9%," 14.5% for "10%–19%," 24.5% for "20%–29%," etc.

Figure 12: Actual Coming-to-Office Ratio



The percentage mix in the charts contained in this report is rounded to the first decimal place and, therefore, may not add up to 100%.

2.1. Coming-to-office ratio

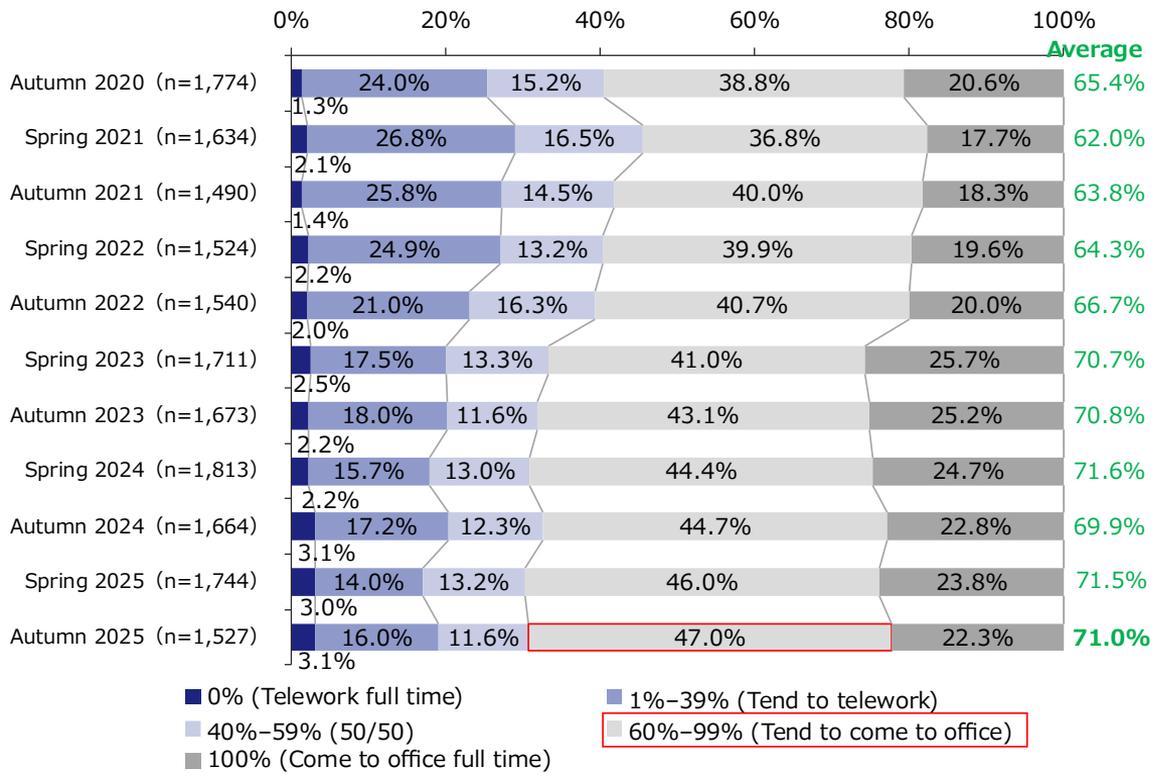
Around half of companies adopt a hybrid work model with a higher proportion of employees coming to the office (60–99% coming-to-office ratio)

We divided the coming-to-office ratio of Figure 12 into five levels--0% (Telework full time), 1%–39% (Tend to telework), 40%–59% (50/50), 60%–99% (Tend to come to office), and 100% (Come to office full time)--and compared the results with previous surveys (Figure 13).

“100% (Come to office full time)” peaked in the Spring 2023 survey and has since gradually declined, reaching 22.3% in this latest survey. Meanwhile, “60–99% (Tend to come to office)” has increased, with 47.0%—roughly half—of companies adopting a hybrid work model with a higher proportion of employees coming to the office. The average coming-to-office ratio was 71.0%, remaining largely unchanged.

*The average value was calculated by adopting the central number within the range indicated by each choice: 5% for “1%–9%,” 14.5% for “10%–19%,” 24.5% for “20%–29%,” etc.

Figure 13: Actual Coming-to-Office Ratio (Comparison over Time)



(All respondents excluding 'Don't know')

2.1. Coming-to-office ratio

Less than 20% come to office full time in Tokyo's 23 wards; telework taken root more than in other regions

Looking at the coming-to-office ratio by office location, the percentage of “100% (Come to office full time)” was less than 20% and the average coming-to-office ratio was 66.2% in Tokyo's 23 wards, indicating that teleworking has been firmly established more than in other regions (Figure 14). Furthermore, while Fukuoka City has a high average coming-to-office ratio of 81.8%, the proportion of “100% (Come to office full time)” is showing a downward trend.

By number of employees, only around 10% of large companies with 1,000 employees or more embraced a coming-to-office ratio of “100% (Come to office full time),” suggesting that telework has become an established practice. On the other hand, while “100% (Come to office full time)” was more than 20% among small companies with less than 100 employees, the average figure was not significantly different from large companies (Figure 15).

Figure 14: Actual Coming-to-Office Ratio – By Office Location

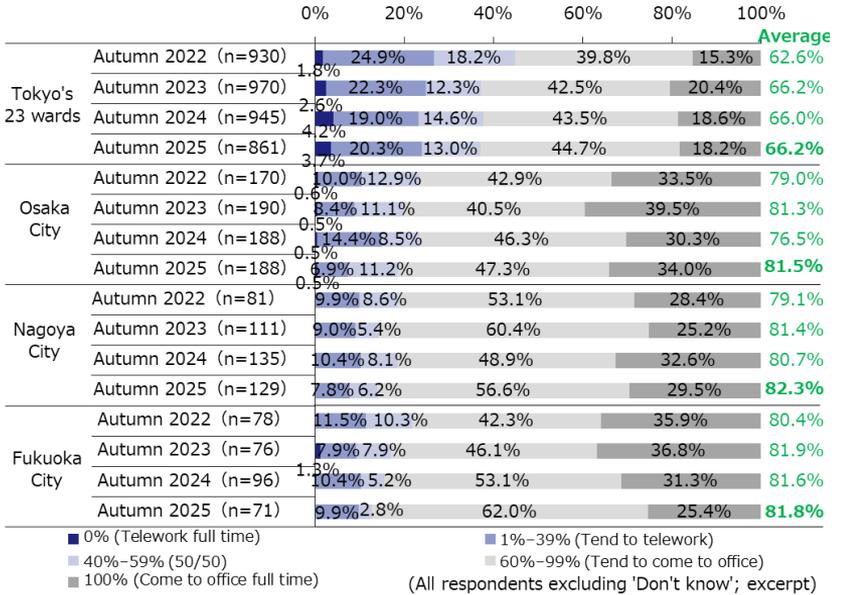
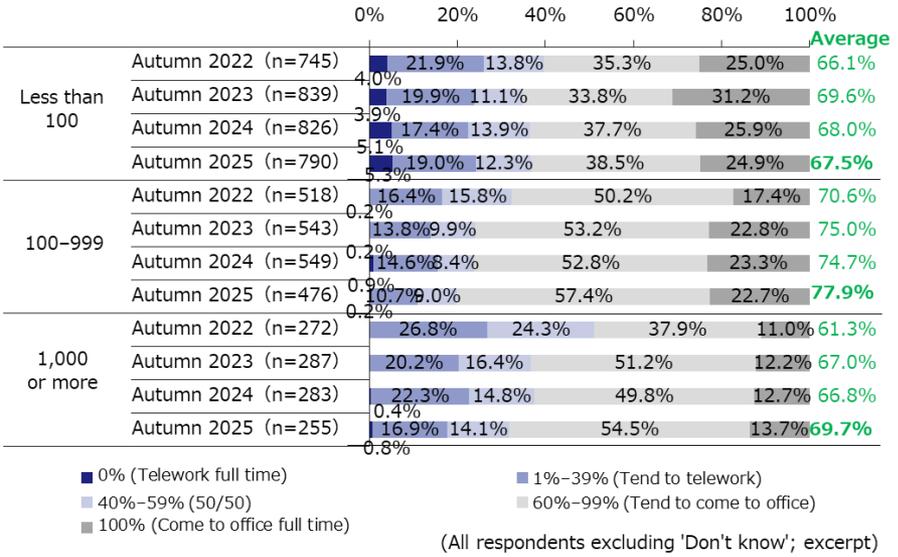


Figure 15: Actual Coming-to-Office Ratio – By Number of Employees



(All respondents excluding 'Don't know'; excerpt)

2.1. Coming-to-office ratio

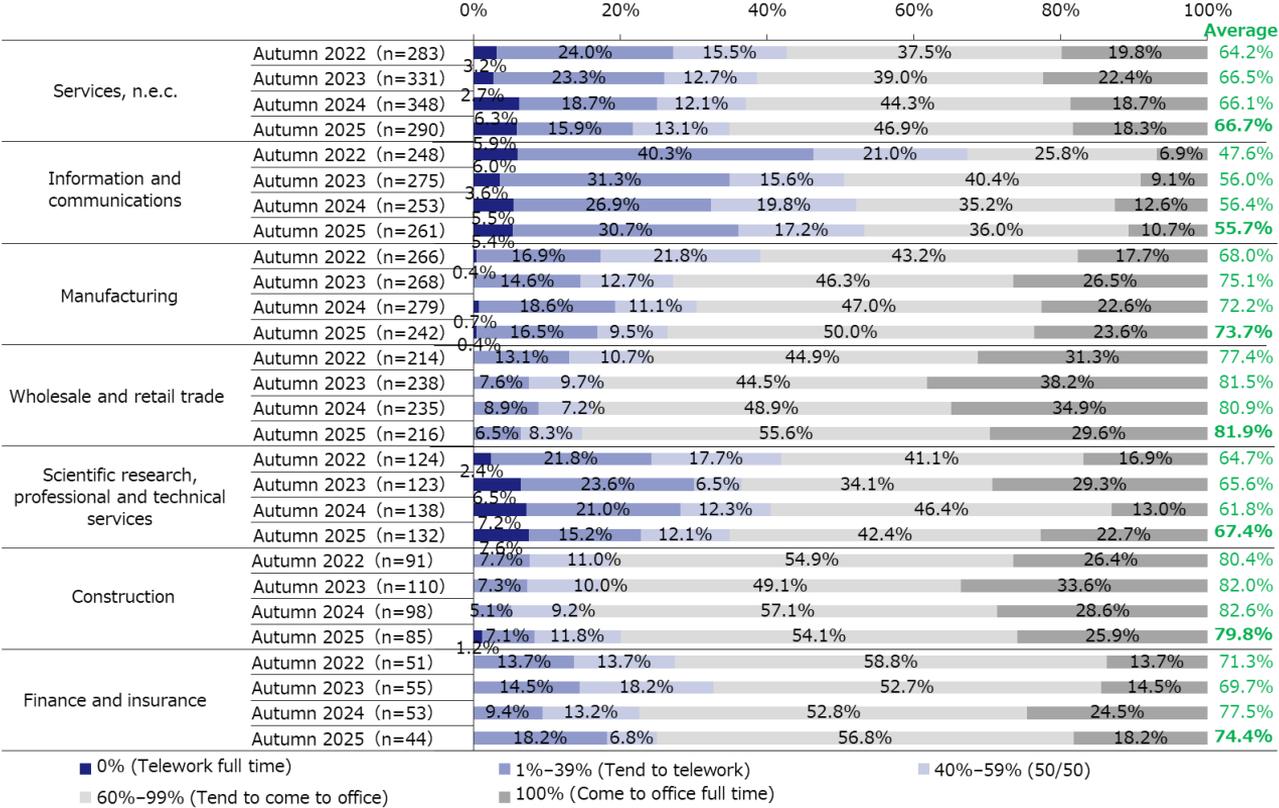
“100% (Come to office full time)” on downward trend even in “Wholesale and retail trade” and “Construction” sectors with high coming-to-office ratios

Figure 16 shows coming-to-office ratios by sector.

The highest average coming-to-office ratio was recorded in “wholesale and retail trade” (81.9%), while the lowest was in “information and communications” (55.7%), indicating significant differences by sector.

However, even in the wholesale and retail trade and construction sectors, which have relatively high average coming-to-office ratios, the proportion of “100% (Come to office full time)” has been declining over time. This suggests that hybrid work is expanding across all sectors.

Figure 16: Actual Coming-to-Office Ratio – By Sector

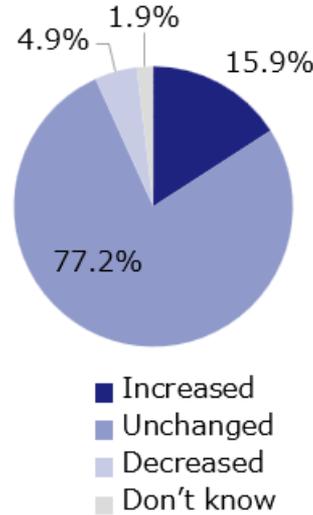


The majority (64.6%) “will not change” their future coming-to-office ratio

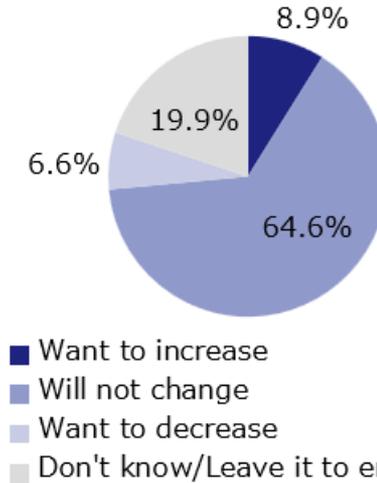
When comparing coming-to-office ratios over the past year, “No change” was the most common response at 77.2%, significantly outpacing the second most common response, “Increased” (15.9%) (Figure 17 (left)). The results indicate that the ratio has stabilized after more than two years since the reclassification of COVID-19 as a Class 5 infectious disease in May 2023.

Regarding future coming-to-office ratio intentions, “Will not change” (64.6%) accounted for the majority (Figure 17 (right)), suggesting that maintaining the status quo appears to be the prevailing stance for the time being.

Figure 17: Change in Coming-to-Office Ratio Over Past Year (Left) and Future Coming-to-Office Ratio Intentions (Right)



(All respondents (n=1,555))



(All respondents (n=1,555))

2.1. Coming-to-office ratio

Large companies that kept coming-to-office ratios low during pandemic saw a return to office over past year

Comparing changes in coming-to-office ratios over the past year and future intentions (Figure 17) by number of employees revealed distinct characteristics based on company size.

First, regarding changes in coming-to-office ratios compared to one year ago, larger companies showed a higher proportion reporting an increase, suggesting employees are returning to the office from telework (Figure 18).

On the other hand, no significant difference was observed in the proportion of respondents who answered “Want to increase” regarding future coming-to-office ratio intentions. Instead, the proportion of those who answered “Don’t know/Leave it to employees” tended to be higher among large companies (Figure 19).

Based on these factors, we can infer that the reason for the significant change over the past year is that, while large companies generally refrain from actively boosting coming-to-office ratios, instead leaving it to employee discretion, they kept the ratio low during the COVID-19 pandemic (Figure 15).

Figure 18: Change in Coming-to-Office Ratio Over Past Year – By Number of Employees

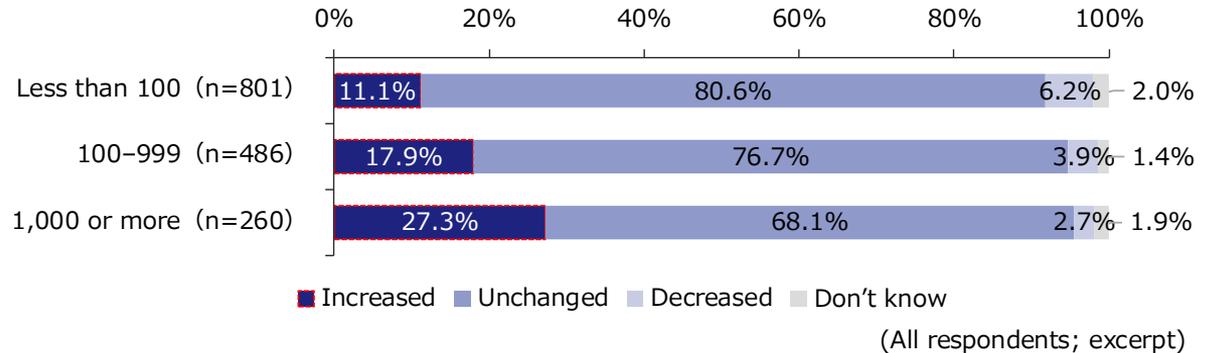
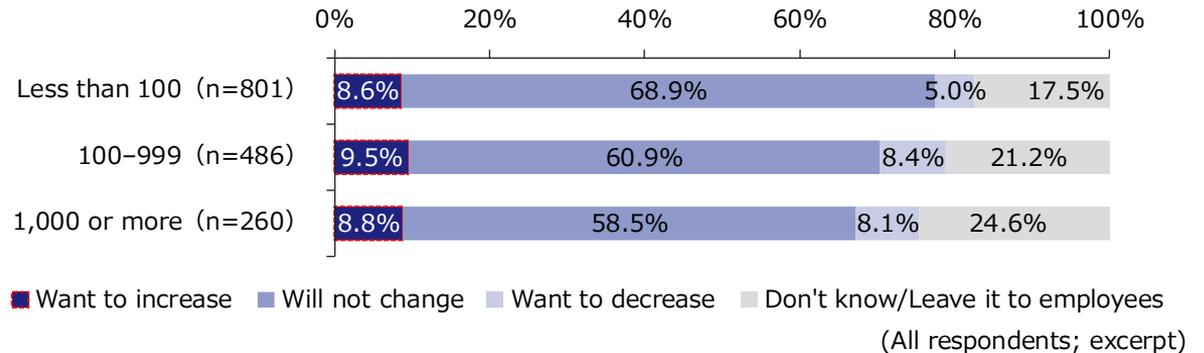


Figure 19: Future Coming-to-Office Ratio Intentions – By Number of Employees



2.1. Coming-to-office ratio

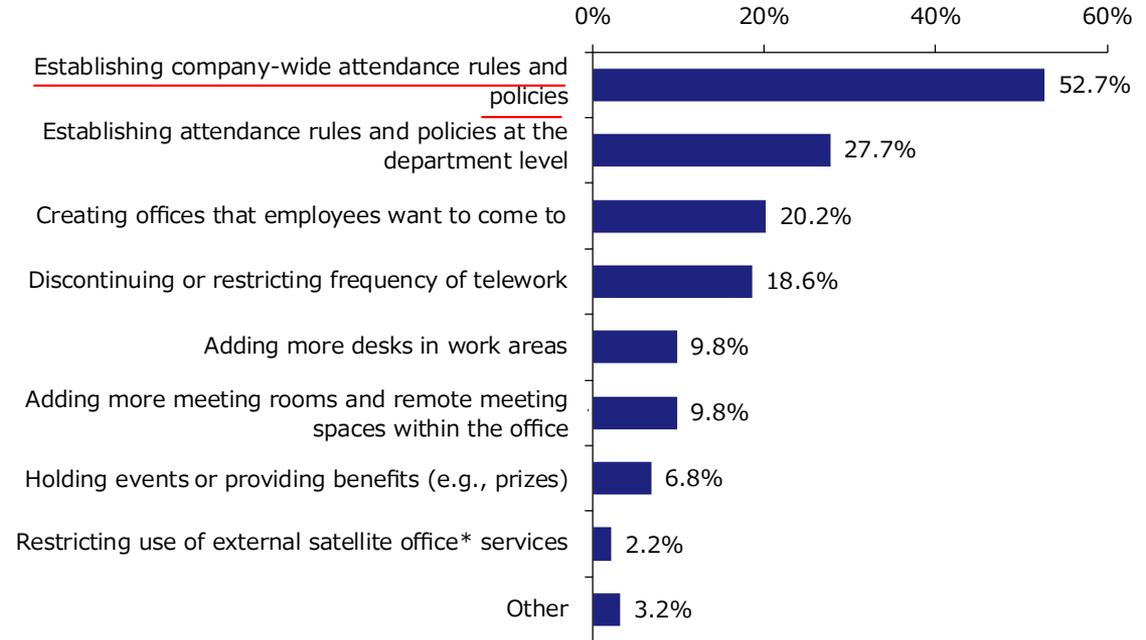
Top initiative to increase coming-to-office ratio: “Establishing company-wide attendance rules and policies”

Figure 20 shows the results of asking companies implementing initiatives to increase coming-to-office ratios about the specifics of those initiatives.

The top response was “Establishing company-wide attendance rules and policies” (52.7%), significantly outpacing other items. Only 18.6% of companies answered “Discontinuing or restricting frequency of telework,” while efforts such as establishing rules and “Creating offices that employees want to come to” are being prioritized.

Furthermore, when examining characteristics by number of employees, we found that initiatives related to office environment improvements—such as “Creating offices that employees want to come to” and “Adding more meeting rooms and remote meeting spaces within the office”—were implemented at a higher rate by larger companies. On the previous page, we noted that larger companies have seen higher office attendance rates over the past year (Figure 18). These efforts to create offices employees want to come to may also be contributing to the increase in coming-to-office ratios.

Figure 20: Initiatives Implemented to Increase Office Coming-to-Office Ratios



(Excluding 'None in particular/Not trying to increase coming-to-office ratio' (n=499); MA)

*Satellite office: A general term for workplaces established for teleworking, separate from the main office or home

32.4% feel current office is “(Very/somewhat) small”

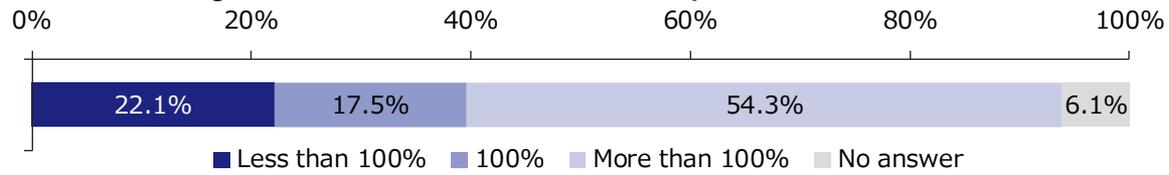
We calculated the percentage of desks provided to office occupants by companies based on the number of office occupants and desks at the time of the survey. We then sorted the results into three groups: “Less than 100%,” “100%,” and “More than 100%” (Figure 21).

The largest group (54.3%) were companies with desks for “more than 100%” of office occupants accounted for the most, while the smallest group (22.1%) were companies with desks for “less than 100%” of office occupants.

As for how companies felt about the size of their current office, 32.4% replied they felt their office was either “very small” or “somewhat small,” while 13.3% felt it was “very large” or “somewhat large” (Figure 22 (red frame)).

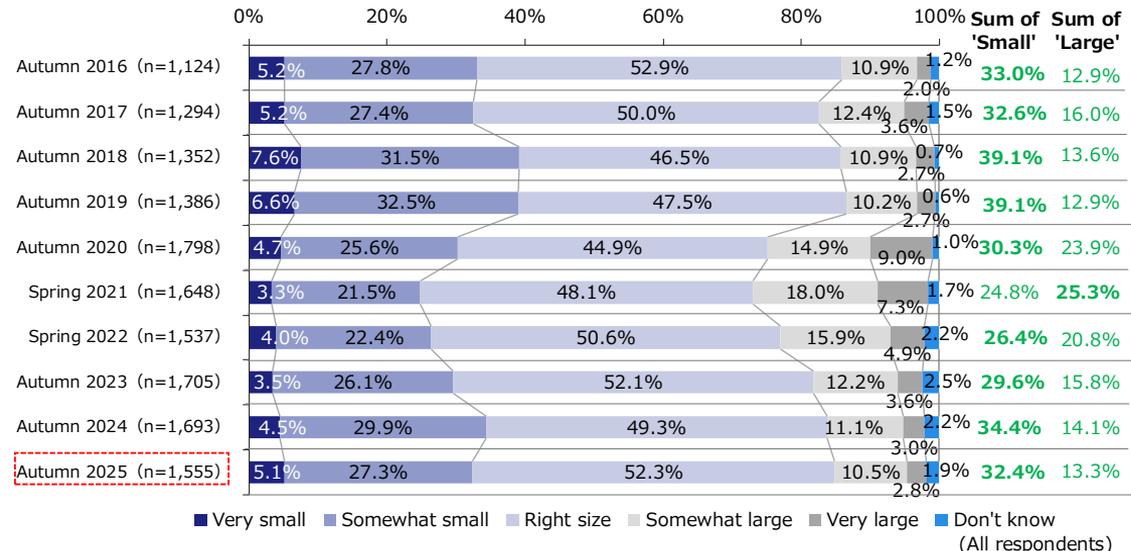
Since the Spring 2021 survey, “(Very/somewhat) small” had been on an upward trend, while “(Very/somewhat) large” had been on a downward trend. This time, however, both declined. As changes in the coming-to-office ratio have leveled off, changes in perceptions of office size also appear to have stabilized.

Figure 21: Percentage of Desks to Number of Office Occupants



(All respondents (n=1,555))

Figure 22: Perception of Office Size



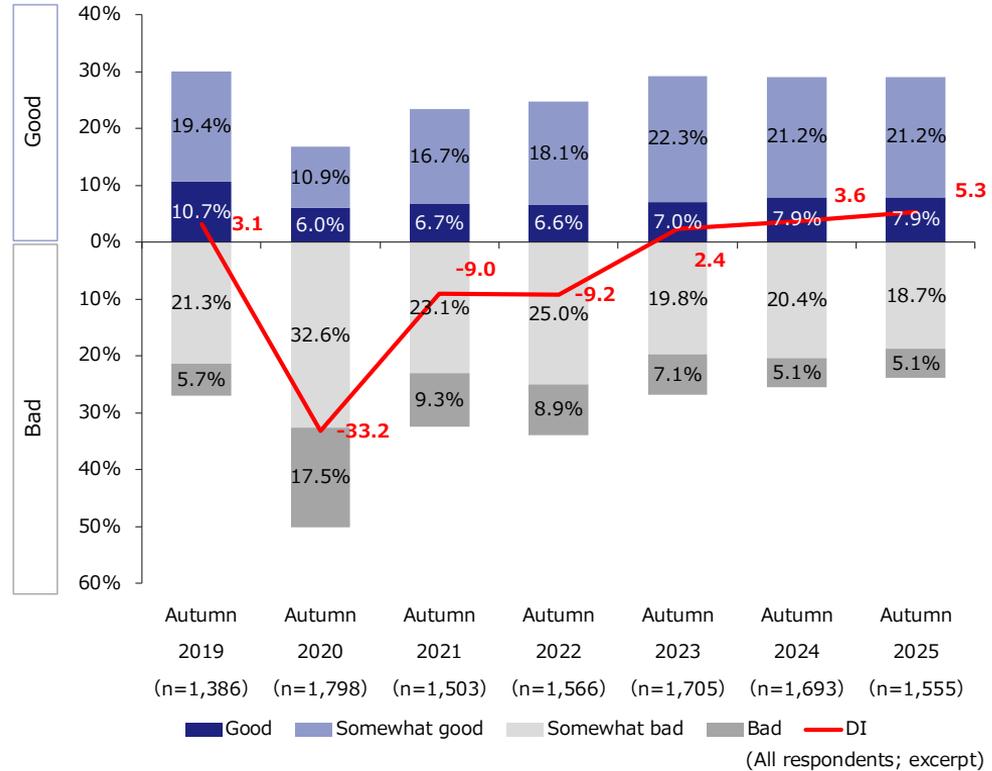
Business sentiment DI remained positive but flat

Figure 23 shows the business sentiment DI, which is the sum of the percentages of “good” and “somewhat good” business sentiments for one’s own company minus the sum of the percentages of “bad” and “somewhat bad” sentiments, based on the following five-point scale: “Good,” “Somewhat good,” “Neither good nor bad,” “Somewhat bad,” and “Bad.”

In this survey, the sum of “Good” and “Somewhat good” was 29.1%, and that of “Bad” and “Somewhat bad” was 23.8%.

The DI stood at 5.3, remaining positive following the Autumn 2024 survey but showing little change.

Figure 23: Business Sentiment



3. Work styles and the workplace

1. Usage and challenges of the main office
2. Work styles and telework
3. Human capital management and evaluation

3.1. Usage and challenges of the main office

Major focuses when implementing office strategies include “Productivity improvement” and “Improvement of employee satisfaction”

When we asked companies their major focuses when implementing office strategies, the top responses included “Productivity improvement” (64.4%), “Improvement of employee satisfaction” (56.8%), and “Employee motivation enhancement” (47.5%) (Figure 24).

These elements directly impact employee experience and performance, and their importance has grown significantly in the context of human capital management in recent years. The situation where offices are required to fulfill diverse roles following the COVID-19 pandemic continues to be firmly established.

Figure 24: Major Focuses When Implementing Office Strategies



(All respondents (n=1,555); MA)

*1 SDGs: Sustainable Development Goals

*2 ESG: Corporate value evaluation indicators based on non-financial information such as Environment, Social, and Governance

3.1. Usage and challenges of the main office

Companies aiming to increase coming-to-office ratios prioritize productivity and communication; those seeking to reduce the ratio focus on satisfaction

Figure 25 shows the results of comparing the major focuses when implementing office strategies (Figure 24) by future coming-to-office ratio intentions (Figure 17).

Among companies that responded they “want to increase” future coming-to-office ratios, a higher proportion focused on “Productivity improvement,” “More active internal communication,” and “Improvement in work engagement” compared to the overall total.

On the other hand, among companies that responded they “want to reduce” the coming-to-office ratio, the proportion that focused on “Improvement of employee satisfaction,” “Employee motivation enhancement,” “Better work-life balance,” and “Refresh and improve health (well-being)” was relatively high.

These results suggest that differences in corporate values regarding what to prioritize in office investments are manifest as differences in office attendance policies.

Figure 25: Major Focuses When Implementing Office Strategies – By Future Coming-to-Office Ratio Intentions

	Future coming-to-office ratio intentions				Total (n=1,555)
	Want to increase (n=138)	Will not change (n=1,004)	Want to decrease (n=103)	*Don't know/Leave it to employees (n=310)	
Productivity improvement	73.2%	65.5%	64.1%	56.8%	64.4%
Improvement of employee satisfaction	65.9%	55.8%	74.8%	50.0%	56.8%
Employee motivation enhancement	54.3%	45.7%	64.1%	44.5%	47.5%
Operational (work) efficiency	49.3%	43.3%	50.5%	43.9%	44.4%
More active internal communication	66.7%	40.7%	51.5%	38.7%	43.3%
Improvement in work engagement	47.1%	26.3%	40.8%	30.6%	30.0%
Reduction of office costs	31.9%	28.1%	38.8%	24.8%	28.5%
Strengthening hiring; reducing turnover rate	34.8%	25.4%	34.0%	20.6%	25.9%
Better work-life balance for employees	30.4%	21.1%	46.6%	27.1%	24.8%
Enabling employees to refresh or improve health (well-being)	27.5%	21.3%	37.9%	22.3%	23.2%
Support for balancing work and child/elderly care	18.8%	16.0%	21.4%	16.5%	16.7%
Improvement in customer service/satisfaction	18.8%	16.1%	12.6%	13.2%	15.6%
BCP (business continuity plan for disasters, etc.)	17.4%	13.6%	18.4%	15.8%	14.7%
Promoting digital transformation in workplace	15.2%	9.4%	16.5%	10.6%	10.6%
Encouraging innovation; creating new businesses	17.4%	6.6%	14.6%	10.3%	8.8%
SDGs*1 and ESG*2 considerations	3.6%	7.4%	9.7%	8.4%	7.4%
Diversity and inclusion	5.8%	4.2%	4.9%	5.2%	4.6%
Other	0.0%	0.2%	0.0%	0.0%	0.1%
None in particular; don't know	0.7%	8.8%	1.9%	16.8%	9.2%

(All respondents (n=1,555); MA)

*1 SDGs: Sustainable Development Goals

*2 ESG: Corporate value evaluation indicators based on non-financial information such as Environment, Social, and Governance

3.1. Usage and challenges of the main office

Companies want to add/introduce “booth/private room for remote meetings” in their office in the future

We asked companies about existing diverse spaces in their main office*1 and those they wish to add or introduce in the future (Figure 26).

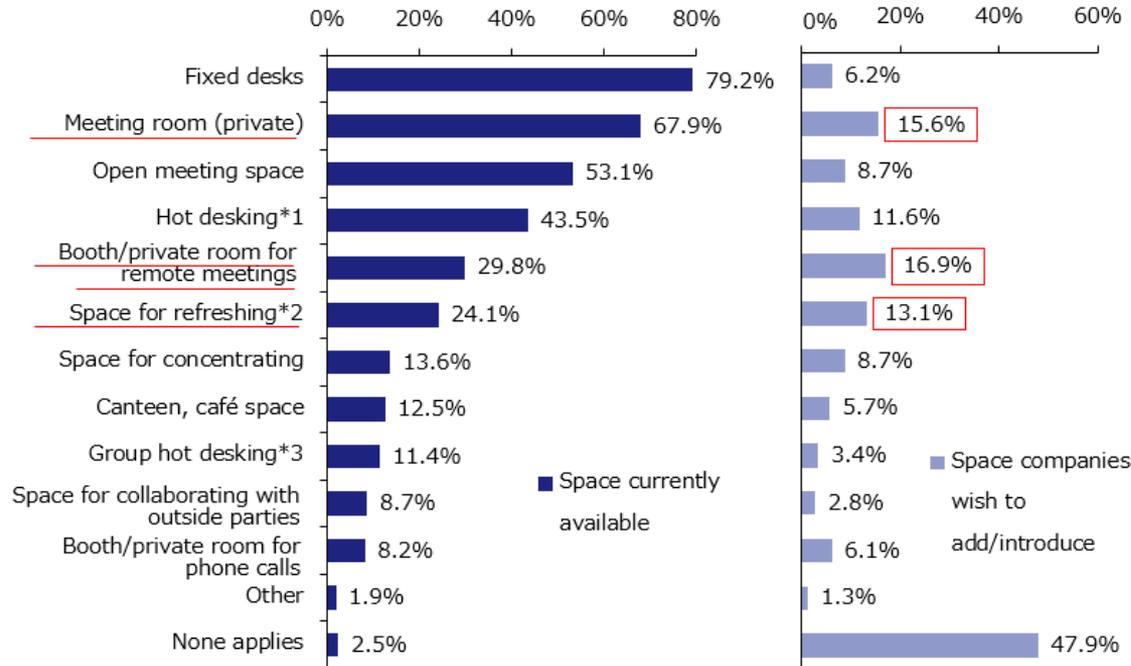
In terms of existing spaces (left chart), the top responses were “Fixed desks” (79.2%), “Meeting room (private)” (67.9%), and “Open meeting space” (53.1%).

Regarding spaces that companies want to add or introduce in the future (right chart), the percentage of “None applies” (47.9%) was high, indicating that many companies felt their current layout was sufficient. Items with relatively high response rates included “Booth/private room for remote meetings” (16.9%), “Meeting room (private)” (15.6%), and “Space for refreshing” (13.1%). As confirmed in Figure 13, with hybrid work involving more office attendance becoming established, office layouts supporting such work styles through ABW*2 are expected to become more available.

*1 Main office: Refers not to decentralized offices (e.g., satellite offices) for teleworking but to the traditional office where employees congregate.

*2 ABW (Activity Based Working): Providing diverse work areas tailored to different tasks, such as booths for concentrating and spaces for team collaboration.

Figure 26: Space Currently Available in the Office (Left) and Space Companies Wish to Add/Introduce in the Future (Right)



(All respondents (n=1,555); MA)

*1 Hot desking: Desks that can be chosen by individuals freely
 *2 Space for refreshing: Space provided to refresh the mind and body. It is not only used for resting, but also for improving health or invigorating communication among employees.
 *3 Group hot desking: Desks within a designated area of the department or team, etc., that can be chosen by individuals freely

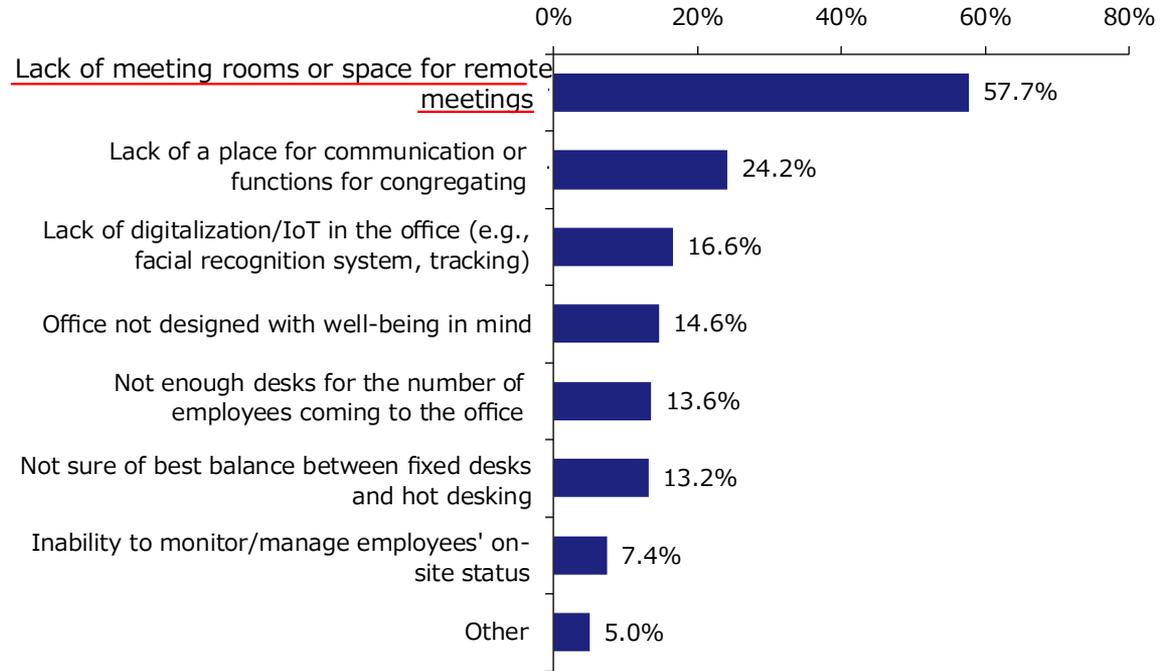
Top issue of main office: “Lack of meeting rooms or space for remote meetings”

When we asked companies experiencing challenges with their main office about the specific challenges they faced, “Lack of meeting rooms or space for remote meetings” ranked highest at 57.7%, significantly outweighing other items (Figure 27).

This suggests that the shortage of meeting rooms and space for remote meetings is recognized as an urgent issue by many companies, as such space are functions for daily operations.

This was followed by “Failure to create a place for communication or functions for gathering” (24.2%) and “Lack of digitization and IoT (facial recognition system, tracking, etc.) in the office” (16.6%). The results suggest that the roles and functions required of the office are becoming more sophisticated.

Figure 27: Problems and Challenges Concerning the Main Office



(Companies experiencing challenges in their main office (n=895); MA)

3.1. Usage and challenges of the main office

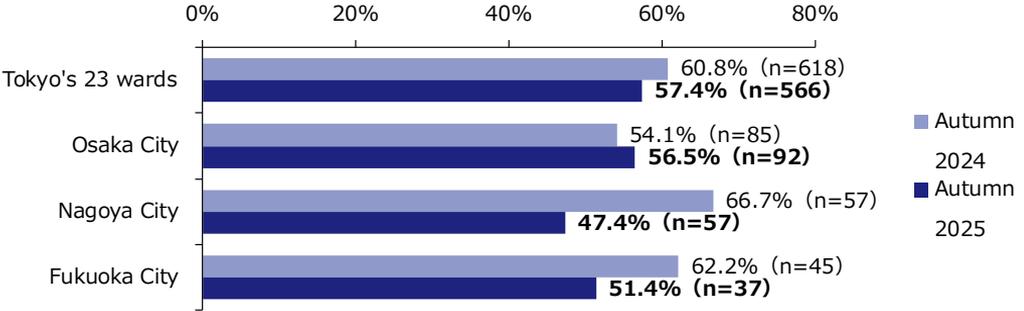
“Lack of meeting rooms or space for remote meetings” relatively high in Tokyo’s 23 wards and Osaka City

We examined the “lack of meeting rooms or space for remote meetings,” the top challenge concerning the main office, by office location (Figure 28) and by number of employees (Figure 29), comparing it with the Autumn 2024 survey.

By office location, the proportion of companies experiencing shortages was relatively high in Tokyo’s 23 wards and Osaka City. In Nagoya City and Fukuoka City, the sense of shortage appeared to have eased compared to the Autumn 2024 survey conducted one year prior.

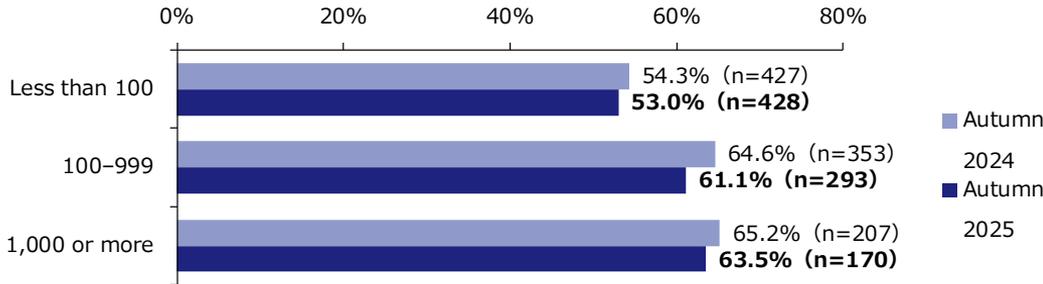
By number of employees, the proportion experiencing shortages was higher among larger companies, reaching 63.5% among those with 1,000 or more employees.

Figure 28: Lack of Meeting Rooms or Space for Remote Meetings – By Office Location



(Companies experiencing challenges in main office; MA; excerpt)

Figure 29: Lack of Meeting Rooms or Space for Remote Meetings – By Number of Employees



(Companies experiencing challenges in main office; MA; excerpt)

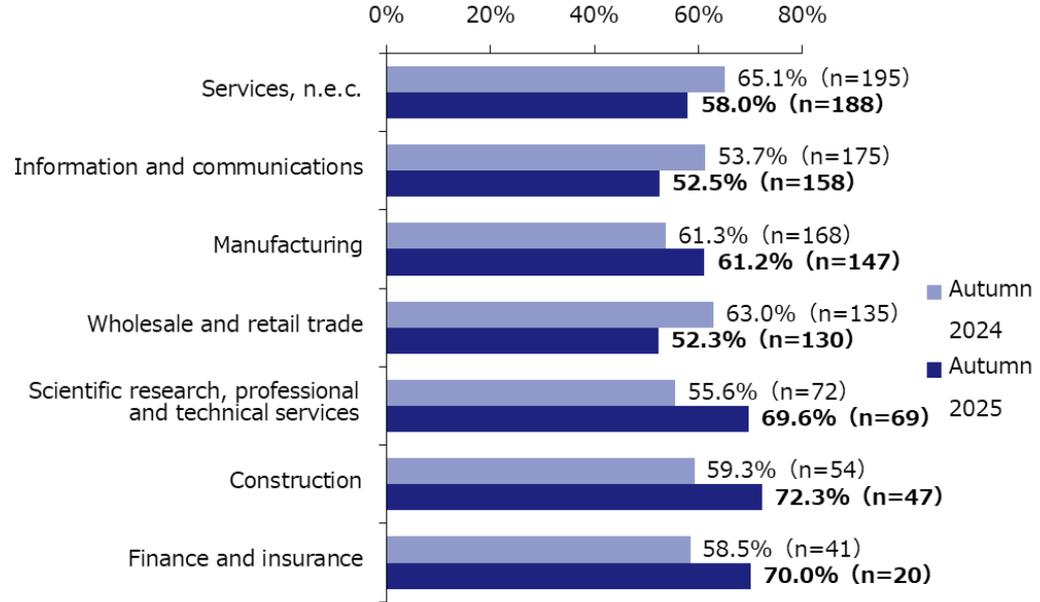
“Lack of meeting rooms or space for remote meetings” gradually being resolved in some sectors vs. a year ago

The results by sector are shown in Figure 30.

In this latest survey, around 70% of companies in “Scientific research, professional and technical services” (69.6%), “Construction” (72.3%), and “Finance and Insurance” (70.0%) cited a shortage of meeting rooms as a challenge, with all sectors showing an increase compared to the Autumn 2024 survey.

Meanwhile, in “Information and communications” (52.5%) and “Wholesale and retail trade” (52.3%), the figures remained around 50%, indicating that the sense of shortage is gradually easing compared to the Autumn 2024 survey.

Figure 30: Lack of Meeting Rooms or Space for Remote Meetings – By Sector



(Companies experiencing challenges in main office; MA; excerpt)

3.1. Usage and challenges of the main office

Groups experiencing lack of meeting rooms report lack of rooms for 1 person (booth/private rooms for remote meetings) and for 2–4 persons

Next, in Figure 31, we compared the types of meeting rooms currently lacking among companies that answered there is a “lack of meeting rooms or space for remote meetings” to the question in Figure 27 and those that did not.

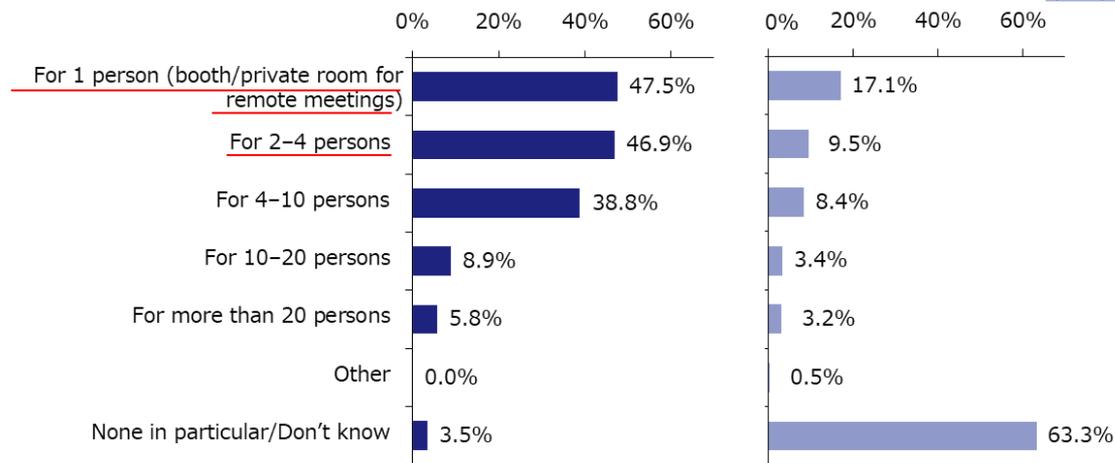
As a result, among groups that identified a shortage of meeting rooms as a challenge, the lack of meeting rooms for 1 person (booth/private room for remote meetings) (47.5%) and for 2-4 persons (46.9%) was particularly pronounced.

Meanwhile, even among groups that did not perceive a shortage of meeting rooms, there was a certain percentage of shortage across all types, including space for 1 person (booth/private room for remote meetings) (17.1%). This suggests that, even in companies where a shortage of meeting rooms is not recognized as an overt challenge, there may be a persistent lack of meeting rooms on a daily basis.

Figure 31: Type of Meeting Rooms Companies Lack – By Perceived Shortage

Left: Companies facing a shortage of meeting rooms (n=516)

Right: Companies not facing a shortage of meeting rooms (n=1,039)



(All respondents (n=1,555); MA)

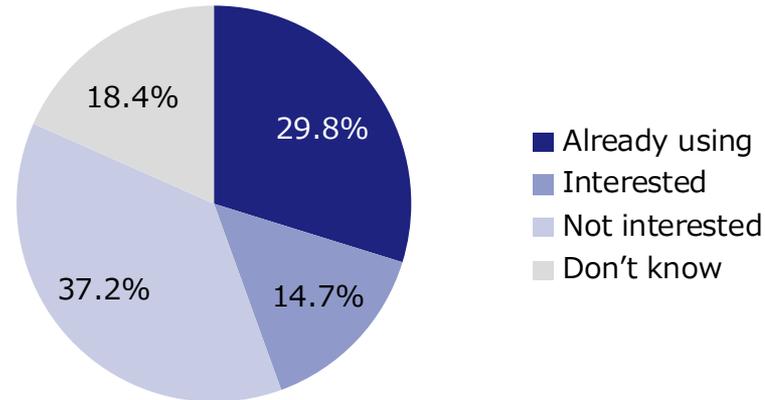
About 30% of companies “already using” shared meeting room services

When asked whether they currently use shared meeting room services,* 29.8% of companies responded that they are “already using” them, while 14.7% said they are “interested” (Figure 33).

As confirmed in Figure 32, many companies are implementing or considering the use of external services to address meeting room shortages. Following the pandemic’s end, office supply and demand have become particularly tight in city centers, driving up rents and raising the barriers to relocation or expansion. Given this background, the use of flexible meeting room services is likely to grow in the future.

*Shared meeting room service: A service that allows users to rent small meeting rooms (for about 4 to 8 people) located in nearby buildings or within their own building for only the time needed, typically on a pay-as-you-go basis. Corporate use is increasing as a solution to the lack of meeting rooms within company offices and from the perspective of optimizing office space efficiency.

Figure 33: Usage Status of Shared Meeting Room Services



(All respondents (n=1,555))

Companies anticipate using shared meeting rooms when in-house meeting rooms are unavailable

Figure 34 shows the results of presenting multiple scenarios for how shared meeting rooms (for 4 to 8 people) might be used and asking respondents to select scenarios likely to occur at their company.

The top response was “Use nearby shared meeting rooms for internal meetings because no company meeting rooms are available” (60.9%), followed by “Use shared meeting rooms near the client’s office for meetings or business negotiations” (44.1%), followed by “Use shared meeting rooms near the client’s office for meetings or business negotiations” (44.1%), followed by “Use shared meeting rooms near the client’s office for meetings or business negotiations” (44.1%), followed by “Use shared meeting rooms near the client’s office for meetings or business negotiations” (44.1%).

Figure 34: Use Cases of Shared Meeting Rooms



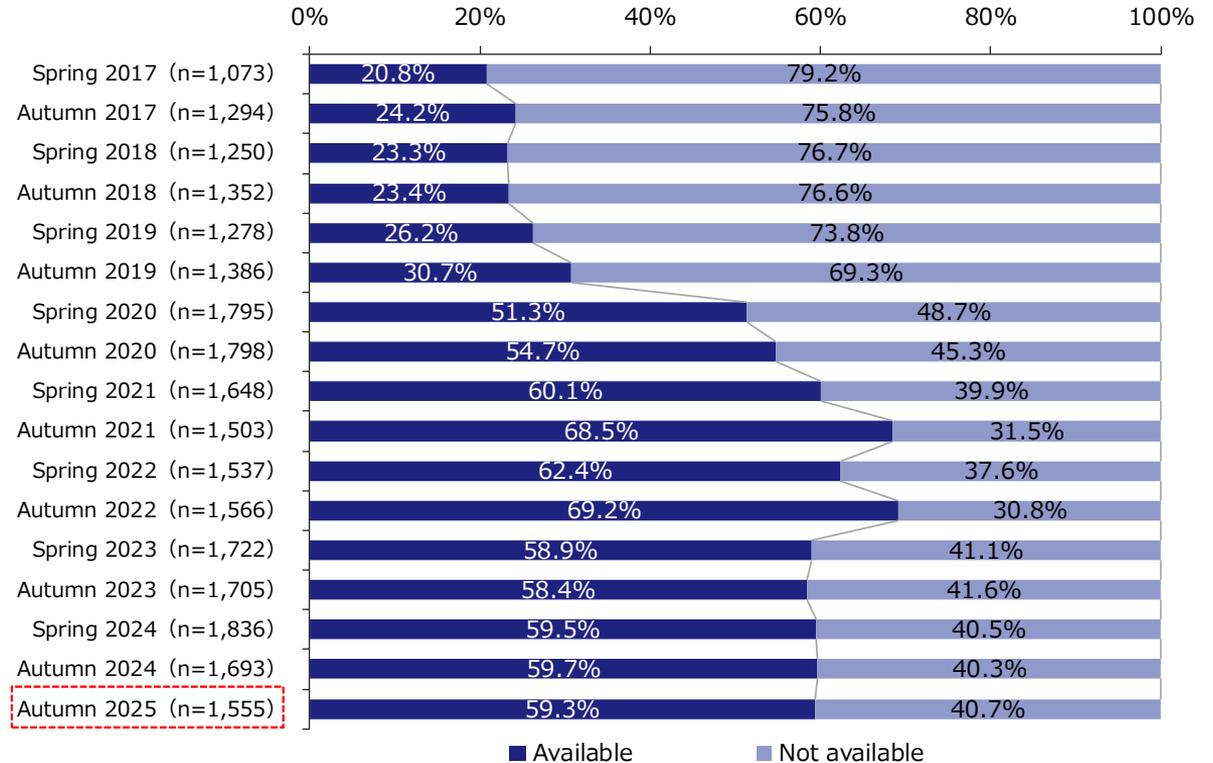
(Excluding 'Don't know/Will not use in any situation' and no answers (n=989); MA)

Approx. 60% of companies provide a place or policy for employees to telework

59.3% of the companies replied that at least one of the following three initiatives for telework was available: “Work-from-home policy,” “satellite offices provided by specialized operators,” and “satellite offices owned or leased by the company” (Figure 35 (red frame)).

It has remained flat since the Spring 2023 survey.

Figure 35: Availability of Place or Policy for Telework



(All respondents)

Both work-from-home policy and satellite office availability remained flat

Figure 36 shows the changes in the availability of places and policies for telework over time, namely work-from-home policies and satellite offices.*

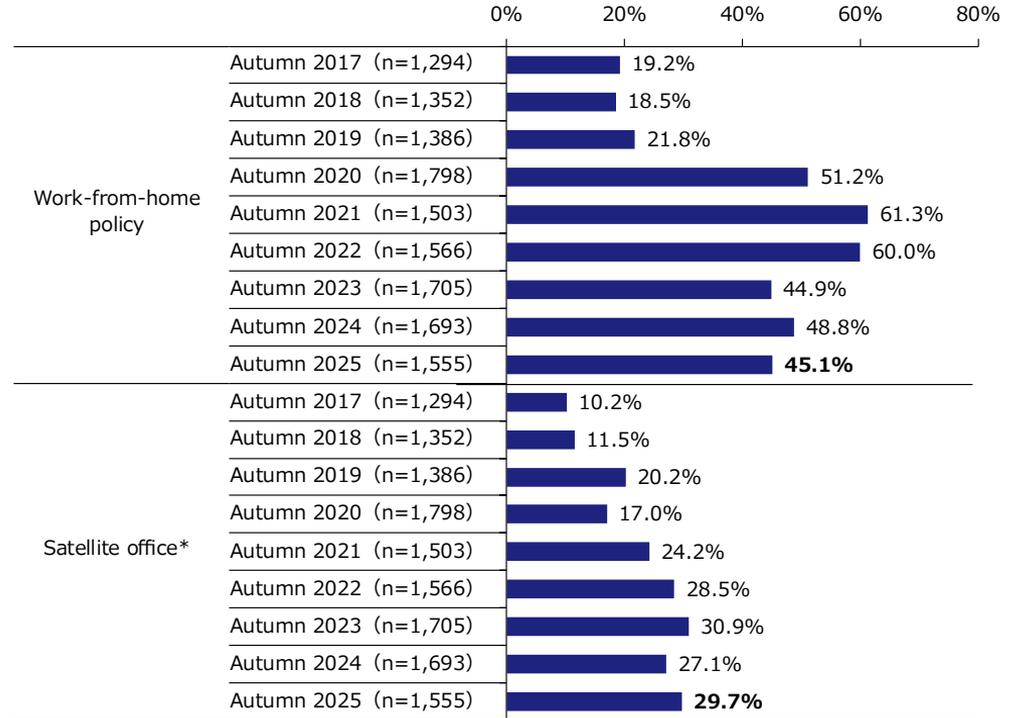
The availability of work-from-home policies peaked at 61.3% in the Autumn 2021 survey and has since declined, hovering around the 40% range after the pandemic subsided. In this latest survey, the figure was 45.1%.

The availability of satellite offices was 29.7%.

Both showed little change from the Autumn 2024 survey conducted one year ago, remaining flat.

*Either "Using satellite offices provided by specialized operators," or "Establishing satellite offices owned or leased by the company"

Figure 36: Availability of Work-from-Home Policy and Satellite Office



(All respondents; MA)

*Either "Using satellite offices provided by specialized operators" or "Establishing satellite offices owned or leased by the company"

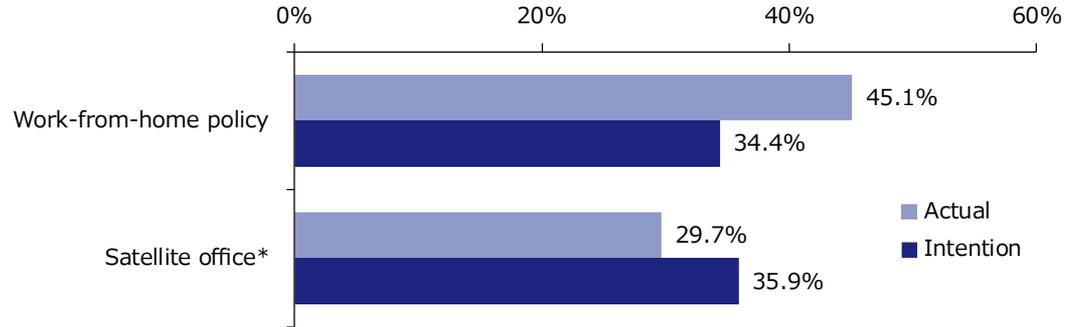
35.9% of companies wish to introduce satellite offices in the future

Figure 37 shows the initiative concerning the place or policy for telework that companies wish to implement in the future (up to 1–2 years ahead), regardless of the current situation.

34.4% of companies intend to introduce a “work-from-home policy,” lower than the actual availability (45.1%).

Meanwhile, the intention to introduce “satellite offices” stood at 35.9%, higher than the actual availability (29.7%) and also higher than the intention to introduce a “work-from-home policy.”

Figure 37: Initiatives for Telework Places or Policies to Be Implemented in the Future



(All respondents (n=1,555); MA)
 *Either "Using satellite offices provided by specialized operators" or
 "Establishing satellite offices owned or leased by the company"

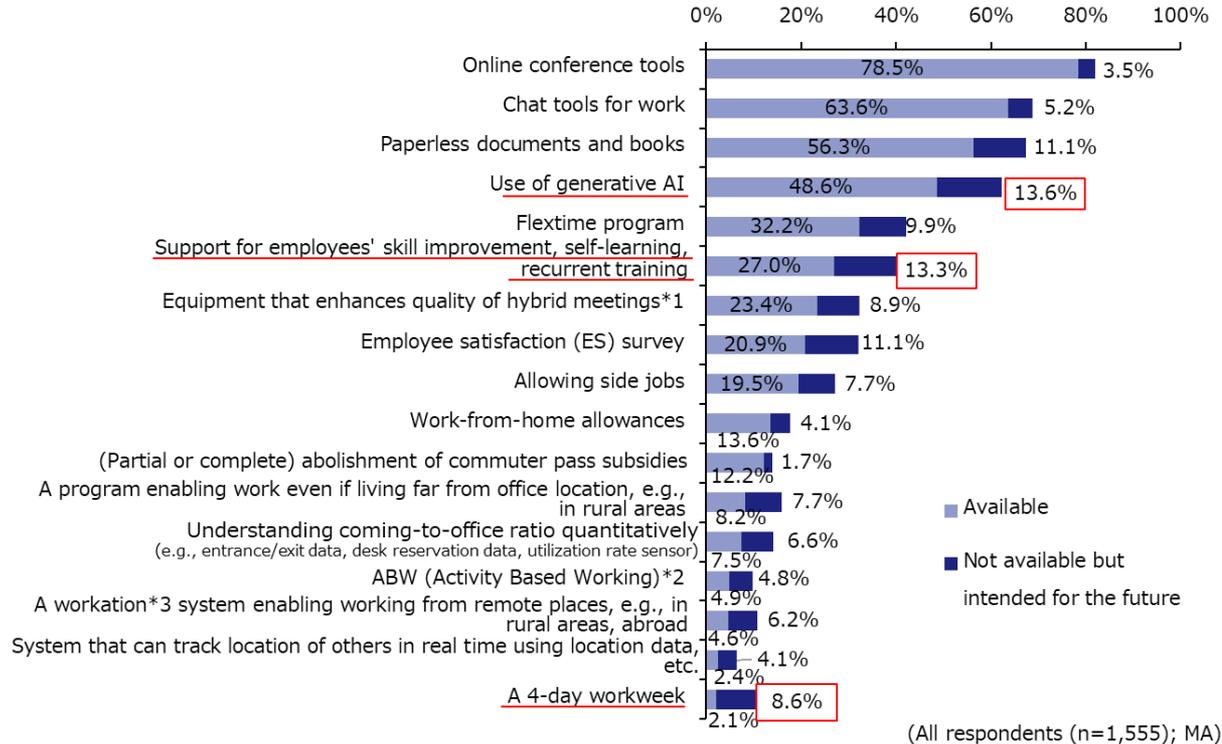
“Use of generative AI” and “Support for employees’ skill improvement, self-learning, recurrent training” hold potential for future growth

Figure 38 shows the combined percentage of work style initiatives that are currently available, plus those that are not currently available but that companies intend to implement in the future (“Not available but with future intent”).

Among currently available initiatives, “Online conference tools” (78.5%) and “Chat tools for work” (63.6%) ranked highest.

The initiatives with the highest future implementation intent were “Use of generative AI” and “Support for employees’ skill improvement, self-learning, recurrent training,” both exceeding 13%. The implementation of these initiatives may grow further in the future. Furthermore, while the current availability of “a 4-day workweek” is a modest 2.1%, the intention to adopt it in the future stands at 8.6%.

Figure 38: Work Style Initiatives



*1 360-degree cameras, large monitors, digital whiteboards, etc.

*2 ABW: Providing a wide variety of work areas that can be selected according to the work, such as booths for concentrating and space for team work.

*3 Workation: A portmanteau of work and vacation, meaning to work from a travel destination, etc.

Over 30% of companies struggle to invigorate internal communication. Companies are devising various strategies.

When asked whether they believe internal communication (both face-to-face and online) has become more active, around 60% of respondents answered “(Somewhat) agree,” while 33.4% answered “(Somewhat) disagree,” indicating that a certain number of companies perceive this as a challenge (Figure 39).

Additionally, when asked in an open-ended format about initiatives being implemented to invigorate internal communication, the responses were broadly categorized into the four types below. Below are some representative examples of responses for each type.

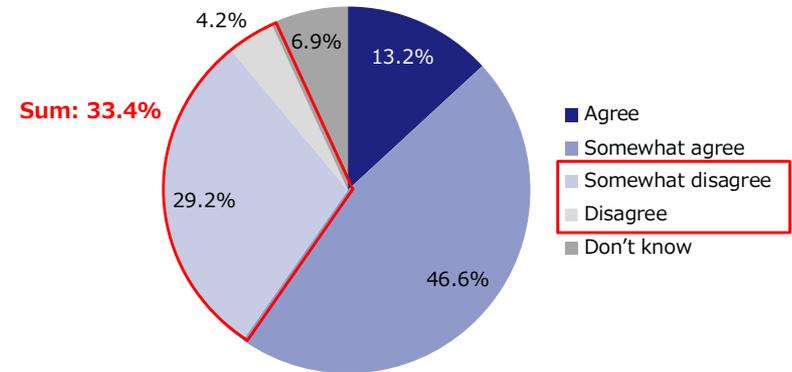
1. Creating daily touchpoints through spatial design and employee benefits: “Café spaces,” “Lounges,” “Free spaces with games, pianos, ping-pong tables, and drums,” and “Social spaces serving alcohol” within the office, as well as “Lottery-based hot desking,” “Free drinks and snacks,” “Suntory’s ‘President’s Treat Vending Machine,’” and “Delivered boxed lunches (to increase opportunities for eating lunch on-site)”

2. Operations to increase office attendance and face-to-face opportunities: “Setting one company-wide in-office day per month,” “Promoting team-based office attendance,” “Lunch gatherings after all-hands meetings,” “Holding lunches with other departments on a regular basis,” “Setting Fridays as in-office days to encourage after-work gatherings”

3. Event and recreation initiatives: Holding company events such as dinners, bowling, games, and cycling, as well as “Hosting seminars on topics useful for personal life such as health and money management,” “Encouraging company clubs,” “Displaying hobby and personal photos,” “Regional BBQ gatherings,” and “Simultaneous group activities for simple tasks (e.g., bag packing)”

4. Promoting dialogue within work processes: “Conducting regular 1-on-1 meetings,” “Encouraging face-to-face meetings whenever possible,” “Ensuring time for casual conversation before and after meetings,” “Utilizing SNS and groupware,” “Operating a virtual office,” “Online shuffle lunches,” “Setting up chat spaces for casual conversation,” “Installing cameras on PCs to see faces”

Figure 39: Whether Internal Communication (Both Face-to-Face and Online) Has Become More Active



(All respondents (n=1,555))

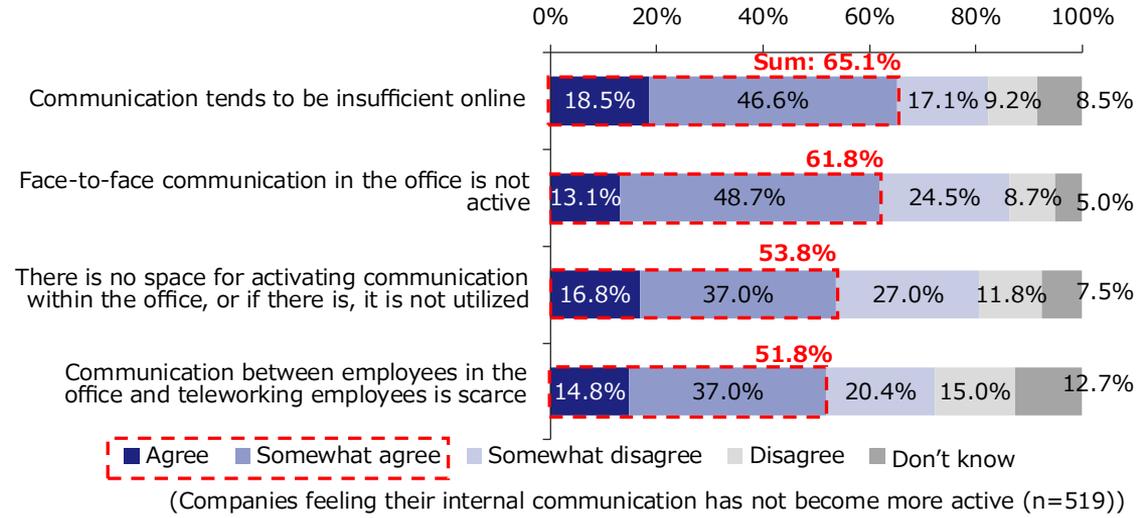
Challenges such as “Communication tends to be insufficient online” have become apparent under hybrid work arrangements

When we asked the approximately 30% of companies reporting in Figure 39 that they “disagree”* that internal communication has become more active about the specific challenges experienced, the top reply was “Communication tends to be insufficient online” (“(Somewhat) agree” total: 65.1%), followed by “Face-to-face communication in the office is not active” (“(Somewhat) agree” total: 61.8%) (Figure 40).

As confirmed in Figure 13, hybrid work has become established in many companies. Going forward, communication strategies and workplace environment improvements will be required based on this premise.

*The combined total of “Disagree” and “Somewhat disagree”

Figure 40: Communication-Related Challenges

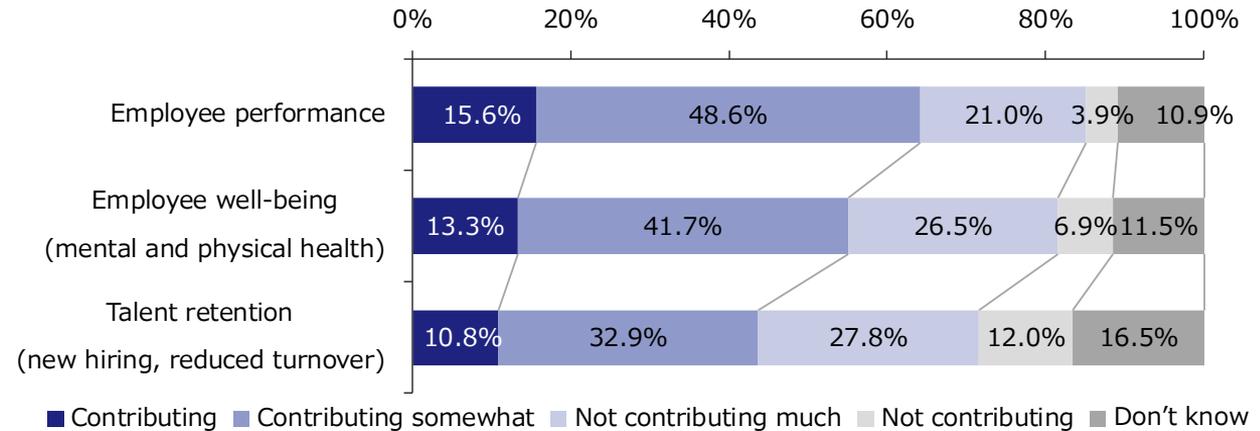


More than 60% say current workplace environment is “contributing (somewhat)” to “employee performance”

We asked companies whether their current workplace environment is contributing to the following three indicators: “Employee performance,” “Employee well-being (mental and physical health),” and “Talent retention (new hiring, reduced turnover)” (Figure 41).

The percentage of “Contributing (somewhat)” was more than 60% for “employee performance” and more than 50% for “employee well-being (mental and physical health).” Although the percentage for “Talent retention (new hiring, reduced turnover)” was 43.7%, lower than other items, it still exceeded “Not contributing (much)” (39.8%).

Figure 41: Level of Contribution to Current Workplace Environment



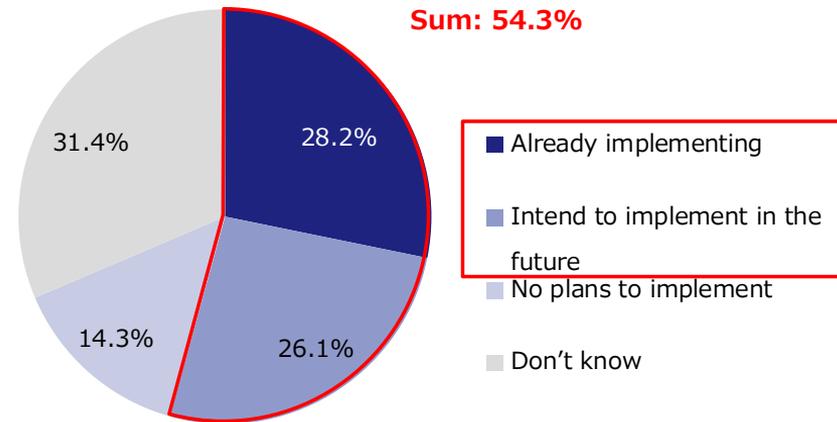
(All respondents (n=1,555))

28.2% of companies are “already implementing” human capital management; 26.1% “intend to implement in the future”

When we asked companies about their status of specific initiatives in human capital management,* 28.2% said they were “already implementing.” Combined with the percentage of companies that “intend to implement in the future” (26.1%), these companies accounted for 54.3% (Figure 42).

*Human capital management: A management approach that considers human resources as “capital” and seeks to improve corporate value over the medium to long term by extracting their value to the full. The “specific initiatives” refer to investments in human resources as well as internal and external information dissemination using the term “human capital management.”

Figure 42: Status of Specific Initiatives in Human Capital Management



(All respondents (n=1,555))

Companies with more advanced human capital management initiatives have higher evaluation of workplace environment

Figure 43 shows the results of comparing the evaluation in Figure 41 by specific human capital management initiatives (Figure 42).

Across all evaluation criteria, the proportion of companies that answered “Contributing (somewhat)” was highest among those “already implementing” human capital management. In particular, nearly 80% of companies engaged in human capital management responded that their workplace environment is “contributing (somewhat)” to “employee performance.” This suggests that companies more proactive in human capital management are also more willing to invest in workplace environments, and that the effects of such investments may be manifesting as outcomes such as employee performance.

When we examine the evaluation in Figure 41 for companies that selected “Discontinuing or restricting frequency of telework” in Figure 20 as an initiative to increase coming-to-office ratios, their evaluation in “Employee well-being (mental and physical health)” was approximately 13 pts lower compared to companies that did not select this initiative. Rather than restricting telework and forcing employees to come to the office, creating an attractive workplace environment that makes employees want to come in voluntarily is likely to lead to more desirable outcomes for companies.

Figure 43: Contribution of Current Workplace Environment to Each Item – By Specific Human Capital Management Initiative

