

## **Metropolitan Areas Office Demand Survey Autumn 2025 <Summary Report>**

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

January 29, 2026

The hybrid work model of combining commuting and telework, which has become widespread due to the COVID-19 pandemic, is becoming established as a permanent way of working. 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. We have released a report summarizing the results of our 19th survey. This **Summary Report** is an excerpt from the full report.

### **Main Findings**

- 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 (Figure 1).
- 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 2).
- 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%) (Figure 3-1).
- 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 (Figure 3-2).
- 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 (Figure 4-1). Additionally, among groups that identified a shortage of meeting rooms as a challenge, the lack of meeting rooms for 1 person (booths/private rooms for remote meetings) (47.5%) and for 2-4 persons (46.9%) was particularly pronounced (Figure 4-2).
- 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 (Figure 5).
- 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" (Figure 6-1). The most frequently cited specific challenge was "Communication tends to be insufficient online" (65.1%) (Figure 6-2).

**Survey Overview**

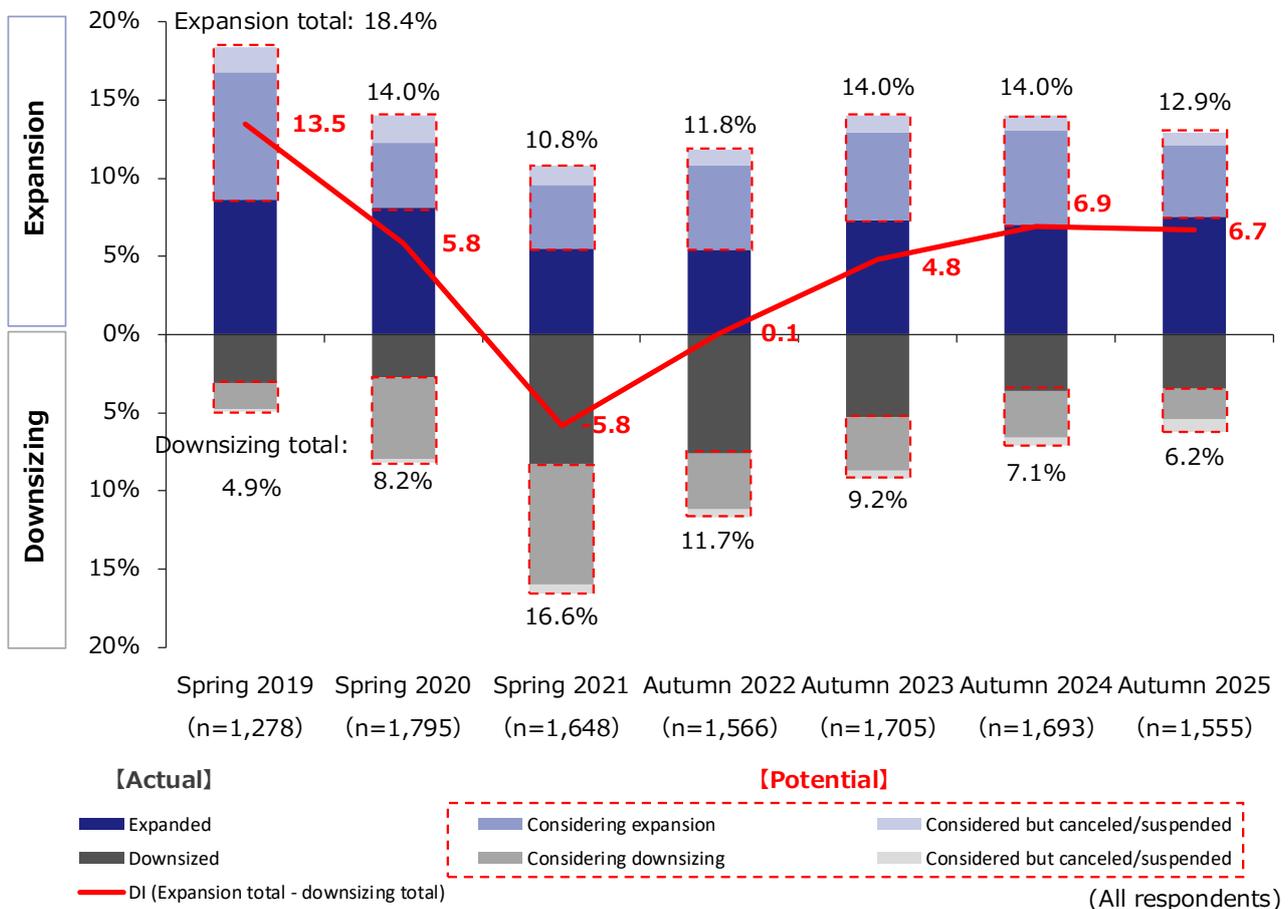
Survey period: November 25–December 7, 2025  
 Target respondents: 59,294 companies in total that include the following:  
 • Tenants of office buildings managed by the Xymax Group  
 • Companies subscribing to ZXY, a satellite office service for corporate customers  
 • Client companies of XYMAX INFONISTA Corporation  
 Number 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

**topic 1**

In terms of changes in office size over the past year, “Expansion (actual + potential),” which hit bottom in the Spring 2021 survey, remained unchanged since the Autumn 2023 survey at 12.9% (Figure 1). “Downsizing (actual + potential)” was 6.2%, continuing a downward trend since peaking in the Spring 2021 survey.

The DI, which is the difference between the expansion total and the downsizing total, remained positive at 6.7, continuing the expansive trend.

**Figure 1: Change in Office Size Over Past Year (Actual + Potential)**

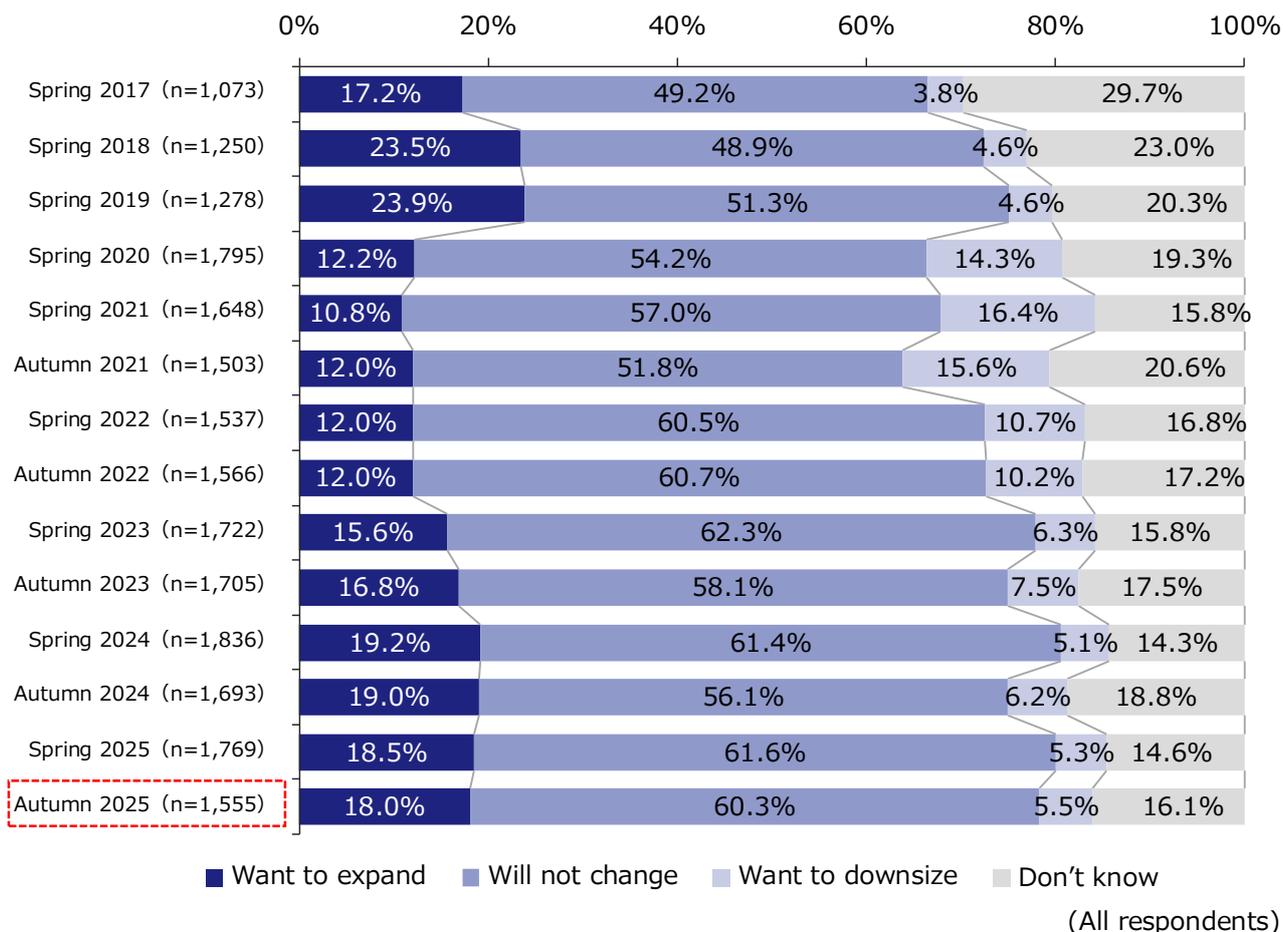


## topic 2

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 2).

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 2: Future Change in Office Size**

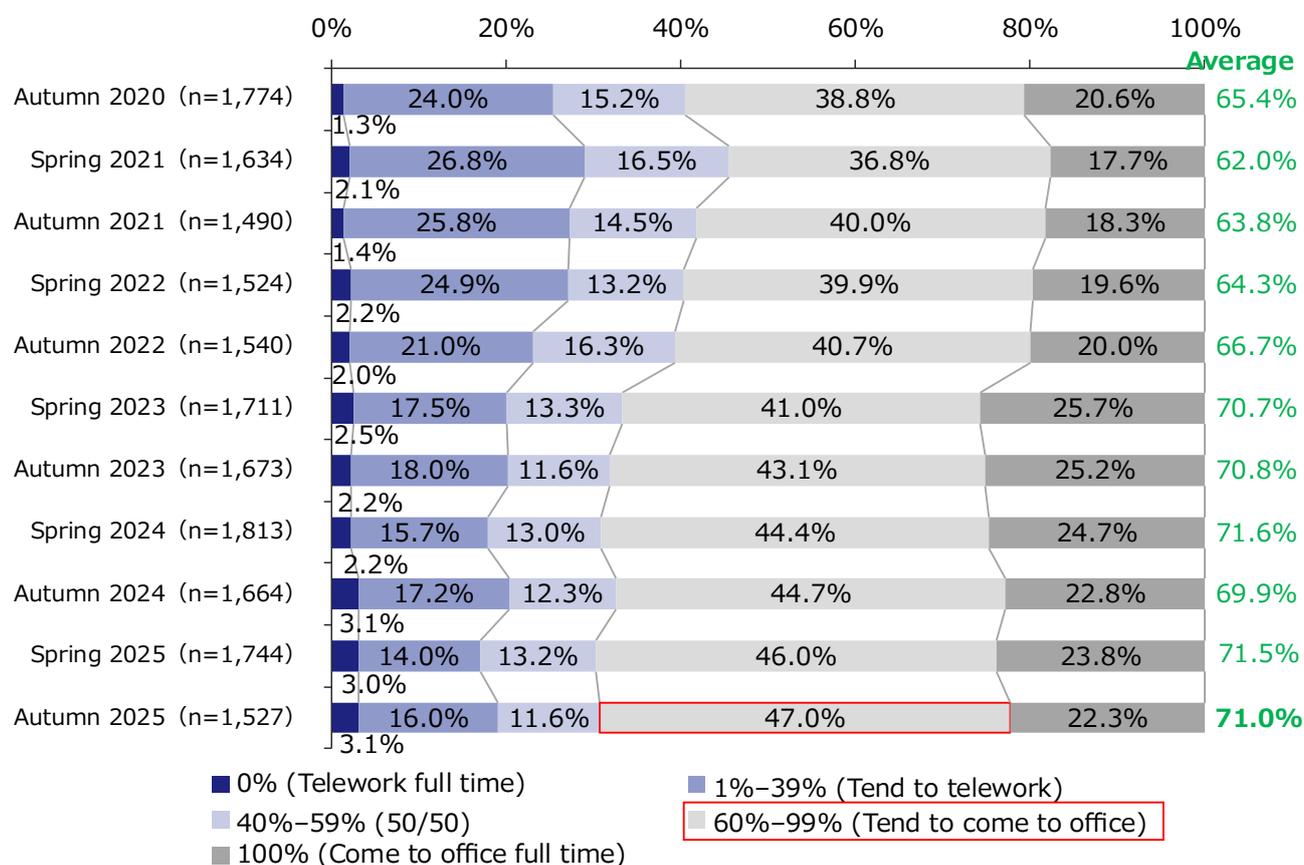


### topic 3

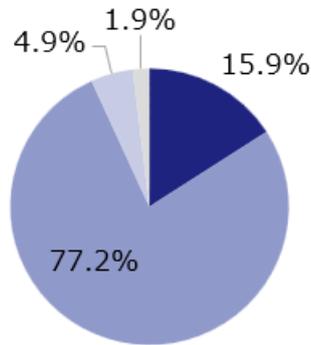
With regard to the coming-to-office ratio, “100% (Come to office full time)” peaked in the Spring 2023 and has since gradually declined, reaching 22.3% in this latest survey. Meanwhile, “60–99% (Tend to come to office)” has increased, with 47.0%—roughly half—of companies adopting a hybrid work model with a higher proportion of employees coming to the office. The average coming-to-office ratio was 71.0%, remaining largely unchanged (Figure 3-1).

When comparing coming-to-office ratios over the past year, “No change” was the most common response at 77.2% (Figure 3-2 (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 3-2 (right)), suggesting that maintaining the status quo appears to be the prevailing stance for the time being.

**Figure 3-1: Actual Coming-to-Office Ratio (Comparison Over Time)**

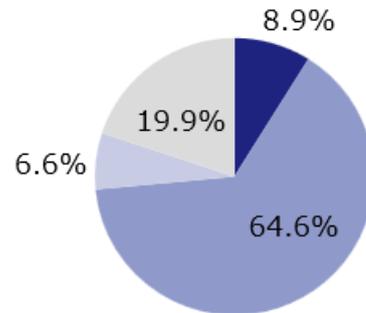


**Figure 3-2: Change in Coming-to-Office Ratio Over Past Year (Left) and Future Coming-to-Office Ratio Intentions (Right)**



- Increased
- Unchanged
- Decreased
- Don't know

(All respondents (n=1,555))



- Want to increase
- Will not change
- Want to decrease
- Don't know/Leave it to employees

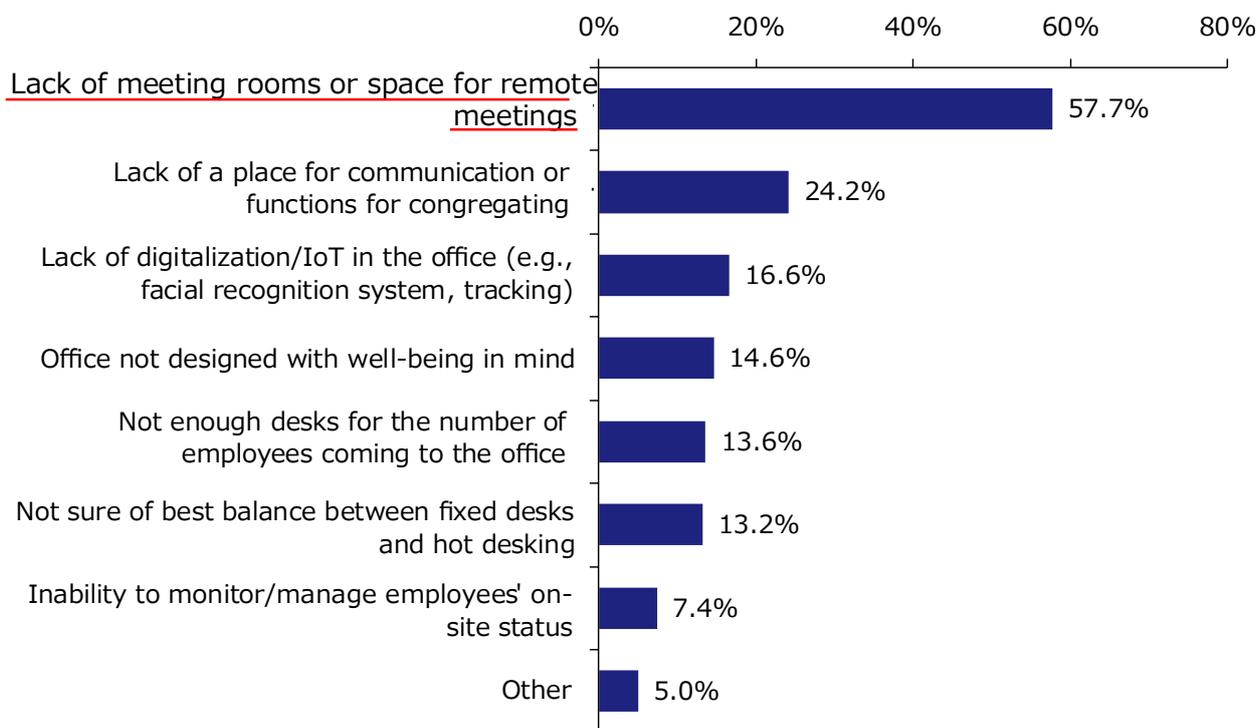
(All respondents (n=1,555))

## topic 4

When we asked companies experiencing problems and 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 4-1). This suggests that the shortage of meeting rooms and remote meeting space is recognized as an urgent issue by many companies, as such space are functions for daily operations.

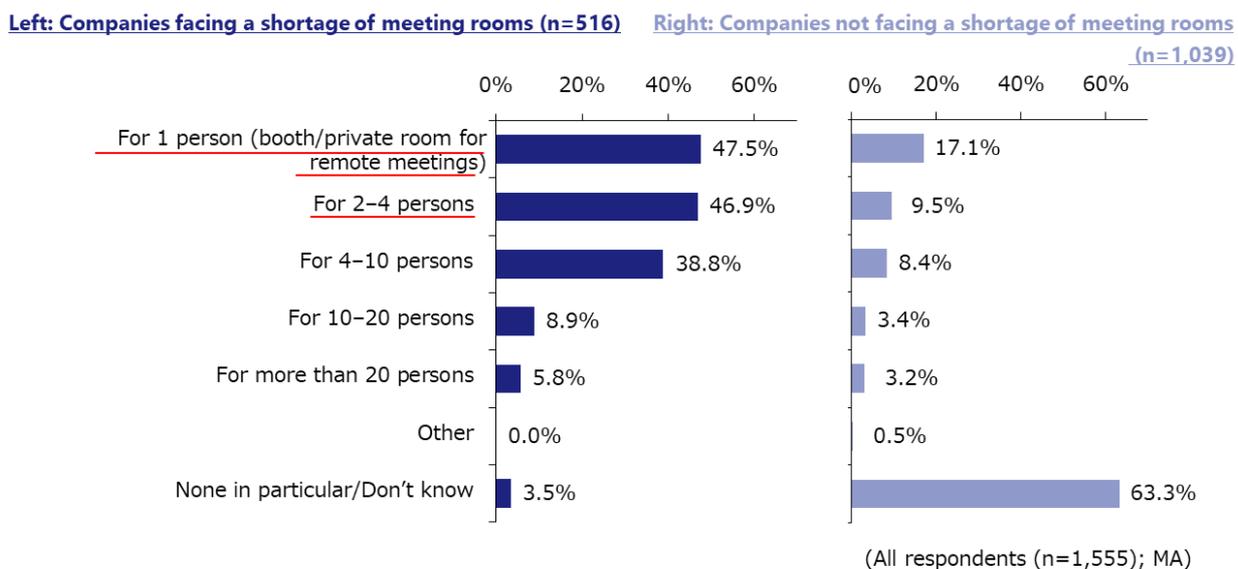
Next, in Figure 4-2, we compared the types of meeting rooms currently lacking against whether the company considered the lack of meeting rooms or remote meeting rooms as a challenge (Figure 4-1). As a result, among groups that identified a shortage of meeting rooms as a challenge, the lack of meeting rooms for 1 person (booths/private rooms 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 (booths/private rooms 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 4-1: Problems and Challenges Concerning the Main Office**



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

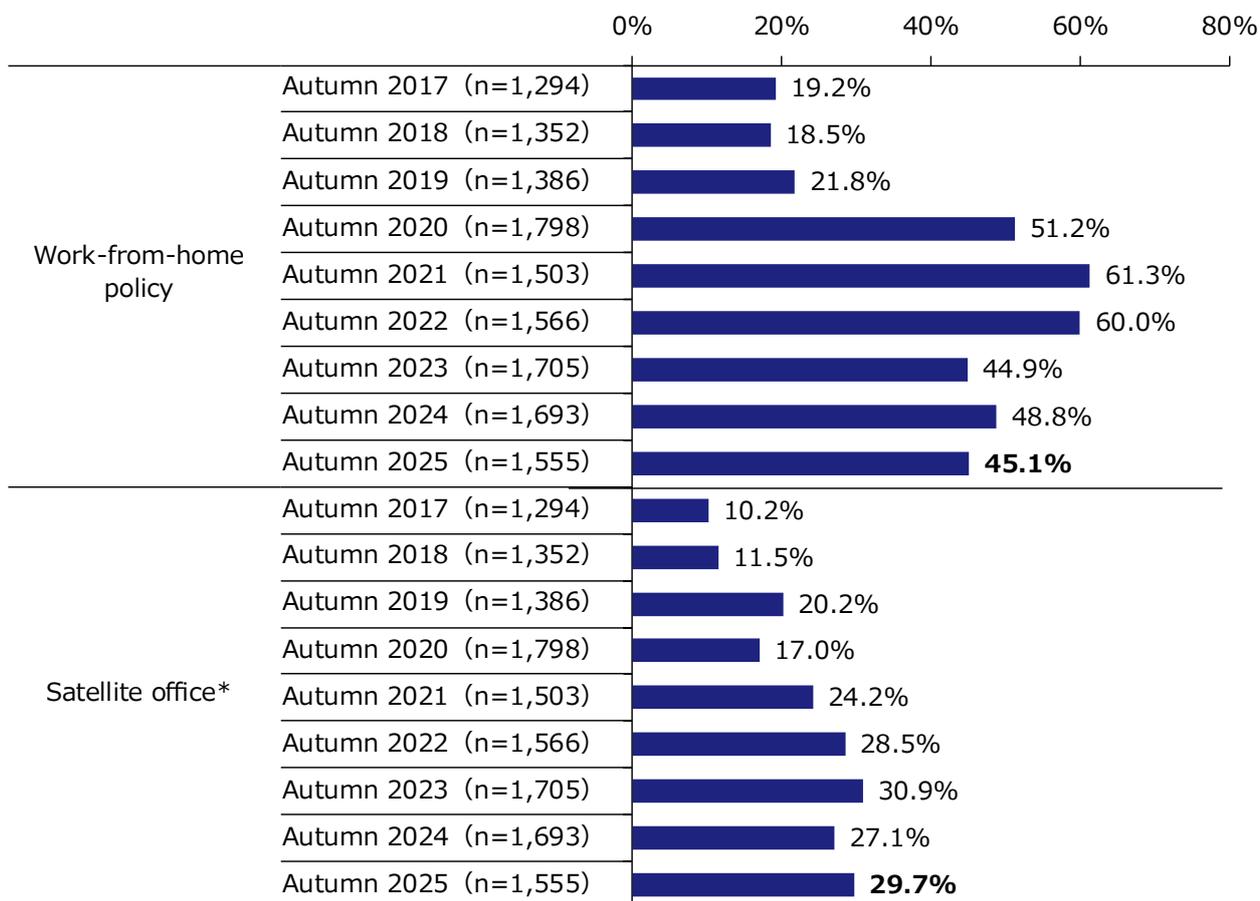
**Figure 4-2: Type of Meeting Rooms Companies Lack – By Perceived Shortage**



## topic 5

The availability of work-from-home policies was 45.1%, down from a peak of 61.3% in the Autumn 2021 survey and a subsequent decline to the 40% level following the pandemic’s subsiding (Figure 5). The availability of satellite offices was 29.7%. Neither showed a significant change from the Autumn 2024 survey conducted one year ago.

**Figure 5: Availability of Work-from-Home Policy and Satellite Office**



(All respondents; MA)

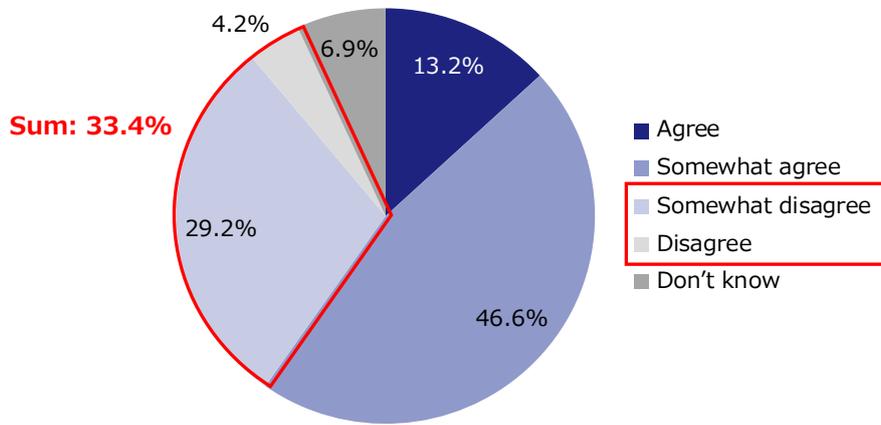
\*Either "Using a satellite office, etc. provided by a specialized operator, etc." or "Set up a satellite office, etc. owned or rented by own company"

## topic 6

When asked whether they believe internal communication (both face-to-face and online) has become more active, around 60% of respondents replied “(Somewhat) agree,” while 33.4% replied “(Somewhat) disagree,” indicating that a certain number of companies perceive this as a challenge (Figure 6-1).

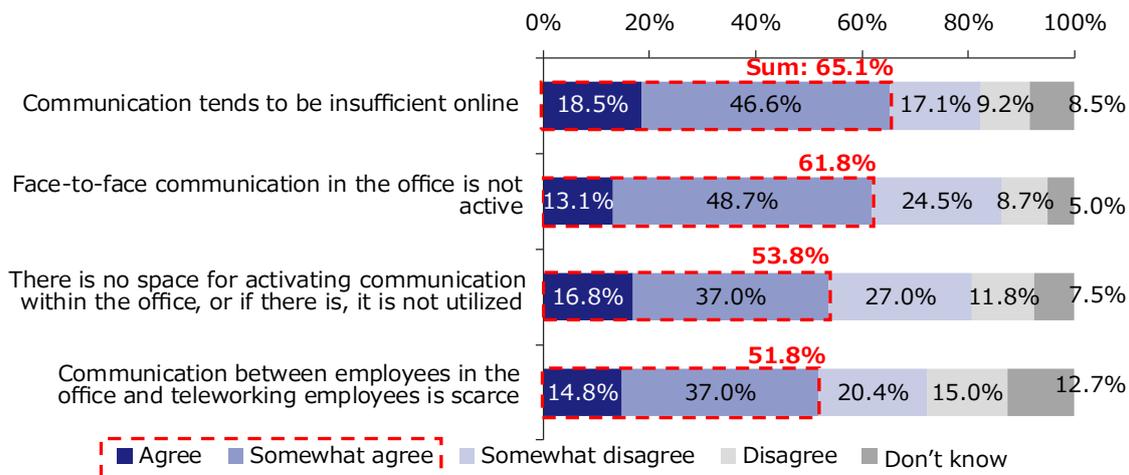
Furthermore, when we asked the approximately 30% of companies reporting that they “disagree” that internal communication has become more active about the specific challenges experienced, the top reply was “Communication tends to be insufficient online” (“(Somewhat) agree” total: 65.1%), followed by “Face-to-face communication in the office is not active” (“(Somewhat) agree” total: 61.8%) (Figure 6-2). As confirmed in Topic 3, hybrid work has become established in many companies. Going forward, communication strategies and workplace environment improvements will be required based on this premise.

**Figure 6-1: Whether Internal Communication (Both Face-to-Face and Online) Has Become More Active**



(All respondents (n=1,555))

**Figure 6-2: Communication-Related Challenges**



(Companies feeling their internal communication has not become more active (n=519))

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%.

**For further inquiries, please contact below:**

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