Metropolitan Areas Office Demand Survey Spring 2026

<Detailed Report>

Is office expansion set to level off? Focus shifts to optimizing workplace functions as hybrid work takes hold.

July 30, 2026

Xymax Research Institute

Survey Overview

The hybrid work model, 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. This report covers the results of the 20th survey.

Survey period	June 2–14, 2026
Target respondents	60,943 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
No. of valid responses	1,602 (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; and Kanagawa, Saitama, and Chiba prefectures)
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	Agriculture and forestry	5 (0.3%)
	Fisheries	0 (0.0%)
	Mining and quarrying of stone and gravel	2 (0.1%)
	Construction	106 (6.6%)
	Manufacturing	254 (15.9%)
	Electricity, gas, heat supply and water	11 (0.7%)
	Information and communications	264 (16.5%)
	Transport and postal services	32 (2.0%)
	Wholesale and retail trade	230 (14.4%)
	Finance and insurance	45 (2.8%)
	Real estate and goods rental and leasing	71 (4.4%)
	Scientific research, professional and technical services	132 (8.2%)
	Accommodations, eating and drinking services	14 (0.9%)
	Living-related and personal services and amusement services	7 (0.4%)
	Education, learning support	26 (1.6%)
	Medical, health care and welfare	32 (2.0%)
	Compound services	14 (0.9%)
	Services, n.e.c.	301 (18.8%)
	Governments and agencies (Excl. those classified elsewhere)	7 (0.4%)
	Unclassifiable	49 (3.1%)
Number of employees	Less than 100	837 (52.2%)
	100–999	491 (30.6%)
	1,000 or more	265 (16.5%)
	Unknown	9 (0.6%)

Type of office	Head office	1,026 (64.0%)
	Branch office	372 (23.2%)
	Sales office	150 (9.4%)
	Sub-office	21 (1.3%)
	Call center	8 (0.5%)
	Computer room	0 (0.0%)
	Other	25 (1.6%)
Location of office	Tokyo's 23 wards	896 (55.9%)
	Osaka City	189 (11.8%)
	Nagoya City	140 (8.7%)
	Fukuoka City	72 (4.5%)
	Other	305 (19.0%)
Size of office under lease (1 tsubo=3.33 sqm)	Less than 30 tsubo	312 (19.5%)
	30–49 tsubo	204 (12.7%)
	50–99 tsubo	270 (16.9%)
	100–199 tsubo	210 (13.1%)
	200 tsubo or more	269 (16.8%)
	No answer	337 (21.0%)
Average employee age	20–29	28 (1.7%)
	30–39	456 (28.5%)
	40–49	863 (53.9%)
	50–59	192 (12.0%)
	60 or above	53 (3.3%)
	No answer	10 (0.6%)
Listing status	Listed	235 (14.7%)
	Not listed	1,334 (83.3%)
	Don't know	33 (2.1%)

Main Findings

1. **Outlook of office demand (from P. 4)**
   - Number of office occupants over the past year: “Increased” (28.4%) outweighed “Decreased” (10.5%).
   - In terms of changes in office size over the past year, “Expansion (actual + potential)” was 14.4%, while “Downsizing (actual + potential)” was 6.2%. The DI has remained largely unchanged at 8.2 since the Spring 2024 survey.
   - Future number of office occupants (up to 1–2 years ahead): “Will increase” was 30.9%, while “Will decrease” was 5.0%. The percentage of “Will increase” has been gradually declining since the Spring 2023 survey.
   - Future office size (up to 2–3 years ahead): “Want to expand” (17.4%) outweighed “Want to downsize” (4.4%).

2. **Factors affecting office demand (from P. 21)**
   - The percentage of companies with a coming-to-office ratio of “100% (Come to office full time)” was 24.8%. Since the transition of COVID-19 to a Class 5 infectious disease (since the Spring 2023 survey), the average coming-to-office ratio has remained around 70%.
   - Perception of office size: The sum of “Very small” and “Somewhat small” (34.8%) outweighed the sum of “Very large” and “Somewhat large” (12.6%).

3. **Work styles and the workplace (from P. 27)**
   - Regarding companies’ major focuses when implementing office strategies, compared to the Spring 2019 survey, the Spring 2024 survey showed an increase in the percentage for all items. The Spring 2026 survey also maintained levels higher than the Spring 2019 survey for many items.
   - Issues felt in the main office: The top issue was “Difficulty in controlling the temperature to a comfortable level” (34.3%). This was followed by “Lack of meeting rooms” (27.4%) and “Lack of private rooms for remote meetings" (17.6%).
   - In terms of future intentions for the spaces within the office, “Want to increase” exceeded “Want to decrease” for all spaces, indicating there is demand for a wide variety of spaces. Even companies that “want to downsize” their office in the future may be intending to increase functions they require, such as “meeting room space” and “space for concentrating,” while optimizing office space with “work desk space” and “work support space.”
   - The availability of work-from-home policies stood at 42.3%, showing a gradual downward trend since the Spring 2023 survey. The availability of satellite offices was 31.7%, remaining largely flat.
   - Issues related to workplace strategies: The top issues reflected a failure to fully utilize the office as a space that supports work styles and organizational development, such as “Failure to activate teamwork and communication” (31.4%), “Cannot determine whether workplace environment is adapted to current work style” (27.2%), and “Failure to contribute to improving employee engagement” (24.4%).
   - In terms of the use of generative AI for work, only 10.4% of companies replied that they “do not use generative AI for work,” indicating that a large majority of companies already use generative AI in their work. Regarding the impact of generative AI, companies expect it will improve work efficiency and enable a shift toward higher-value work.

1. Outlook of office demand

1. Changes over the past year
2. Future intentions

Percentage of both increase and decrease in office occupants largely unchanged

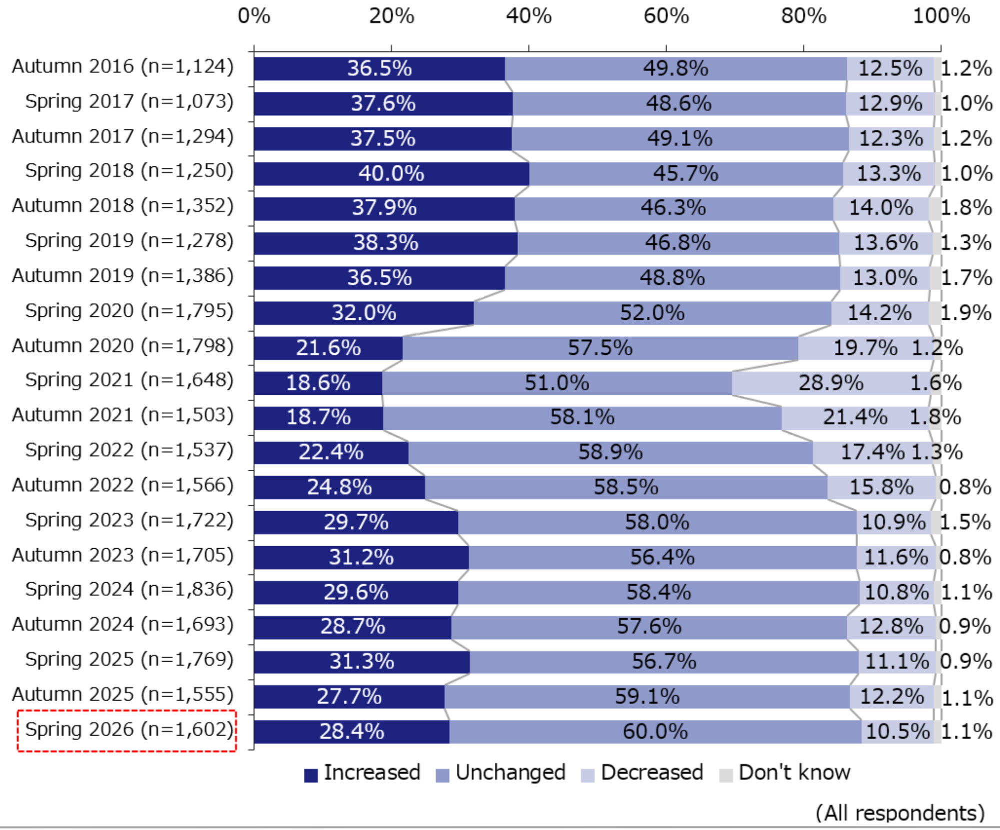
Figure 1 (red box) indicates changes in the number of office occupants* over the past year.

The percentage of companies with an increase in office occupants was 28.4%, exceeding the percentage of companies with a decrease (10.5%).

Looking at trends since previous surveys, the percentage of respondents reporting an increase has risen since bottoming out in the Spring 2021 survey, while the percentage reporting a decrease has declined since peaking in the Spring 2021 survey. Since the Spring 2023 survey, both figures have remained largely flat.

*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

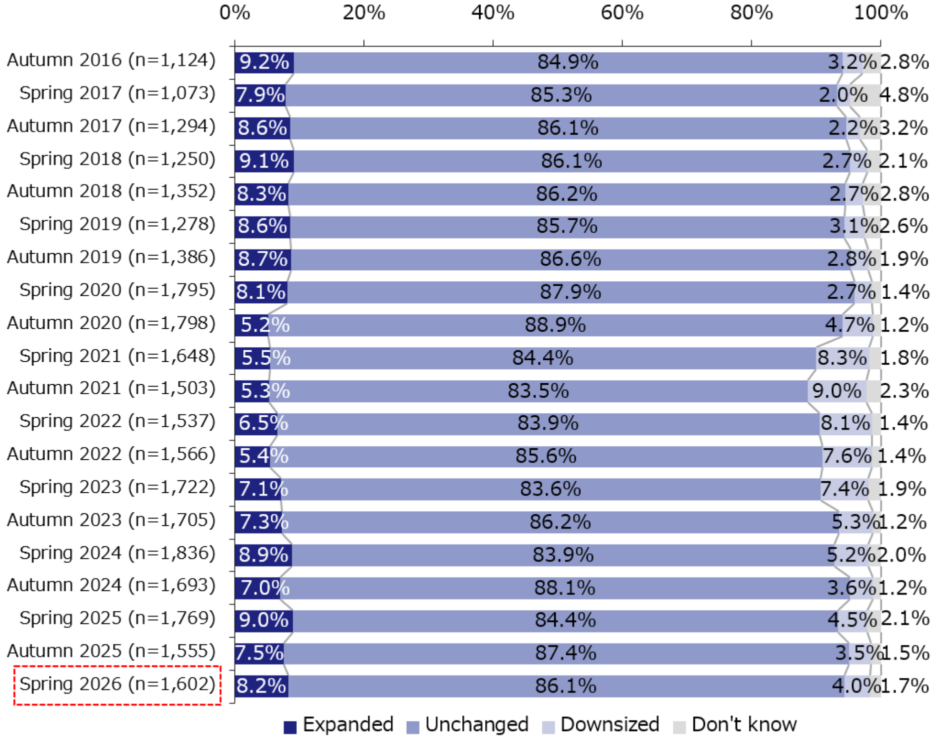


Office size expansion outweighing downsizing since Spring 2023 survey

In terms of changes in office size over the past year, the percentage of companies that “expanded” their office size was 8.2%, while the percentage of companies that “downsized” was 4.0% (Figure 2 (red box)).

“Expanded” has been outweighing "Downsized" since the Spring 2023 survey.

Figure 2: Change in Office Size (*For comparison charts by attribute, see [Appendix 1] at the end of the web page (in Japanese only))



(All respondents)

“Relocation” most popular style of office size expansion and downsizing

The most popular style of office size expansion was “Relocation” (48.9%), followed by “New opening” (19.1%) (Figure 3). “Expansion in same building” has decreased by more than 10 percentage points since the Spring 2025 survey; this may be influenced by the difficulty of securing vacant space for expansion within the same building.

The most popular style of office downsizing was “Relocation” (46.9%) (Figure 4).

Figure 3: Style of Office Expansion

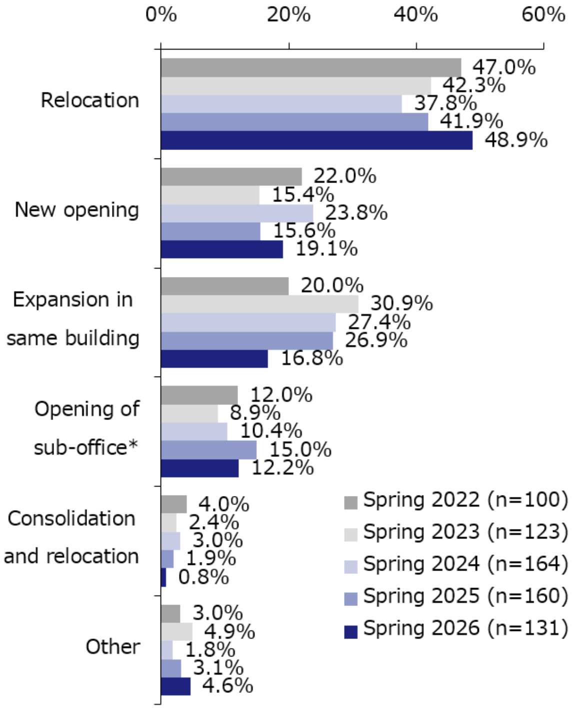
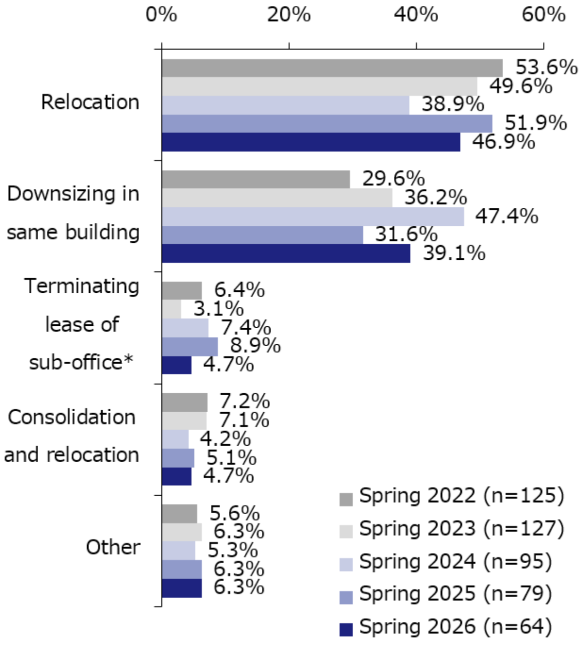


Figure 4: Style of Office Downsizing



(Figure 3: Companies that expanded; MA)
(Figure 4: Companies that downsized; MA)

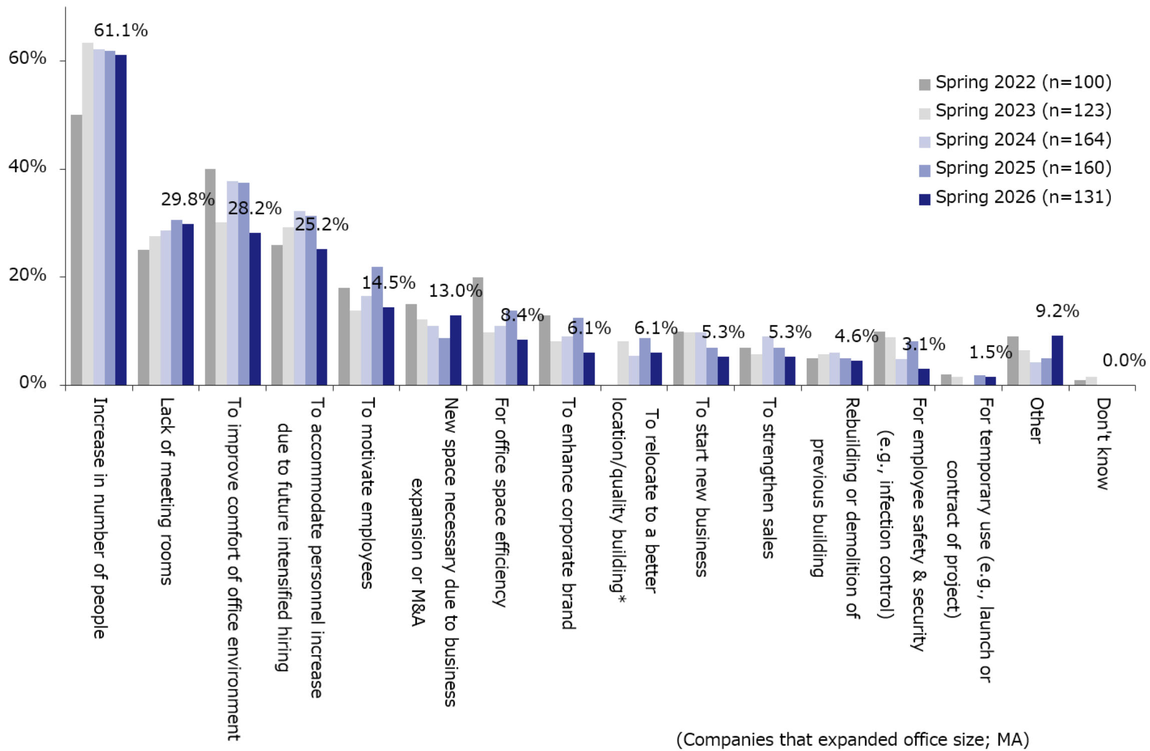
*Sub-office: A separate office located near the main office (e.g., head office) to handle some of its functions

Top reason for office size expansion: “Increase in number of people”

The most popular reason for office size expansion was “Increase in number of people” (61.1%) (Figure 5).

This was followed by “Lack of meeting rooms,” “To improve comfort of office environment,” and “To accommodate increase in personnel due to future intensified hiring.”

Figure 5: Reason for Office Size Expansion



(Companies that expanded office size; MA)
*No chart for the years in which the choice did not exist.

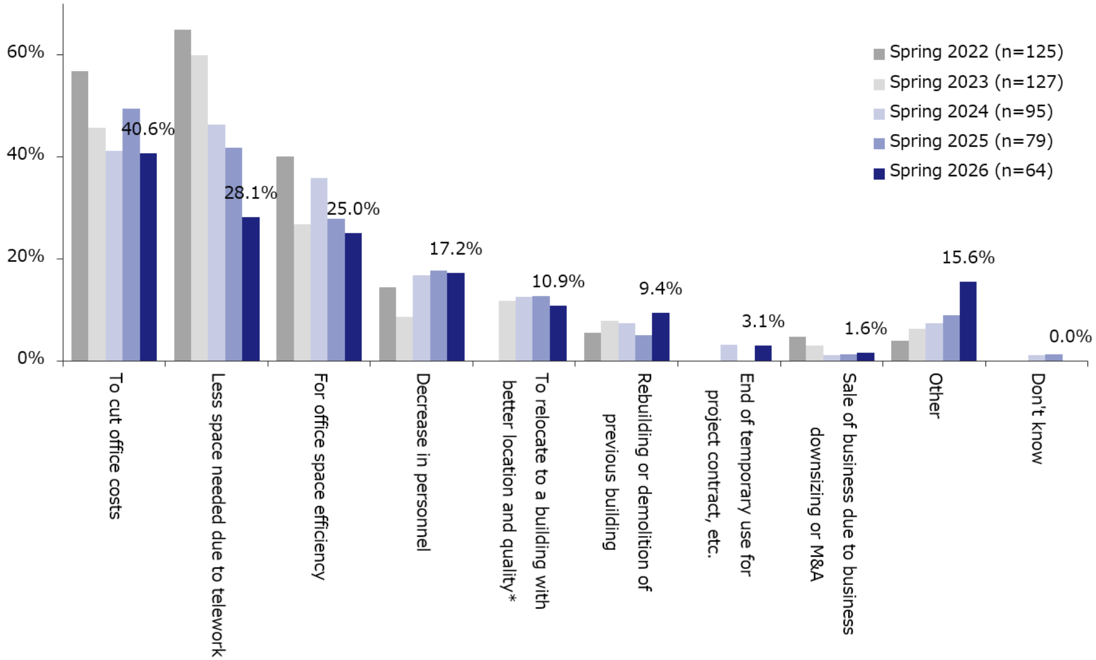
Top reason for office downsizing was “To cut office costs;” “Less space needed due to telework” continued to decline

The top reason for office downsizing was “To cut office costs” (40.6%).

In the open-ended responses for “Other,” answers citing cost factors were also observed, such as “We reduced the leased area to maintain our expense budget due to rising unit prices per tsubo.”

”Less space needed due to telework” has continued to decline since peaking in the Spring 2022 survey, standing at just 28.1% in this survey (Figure 6).

Figure 6: Reason for Office Downsizing



(Companies that downsized office; MA)
*No chart for the years in which the choice did not exist.

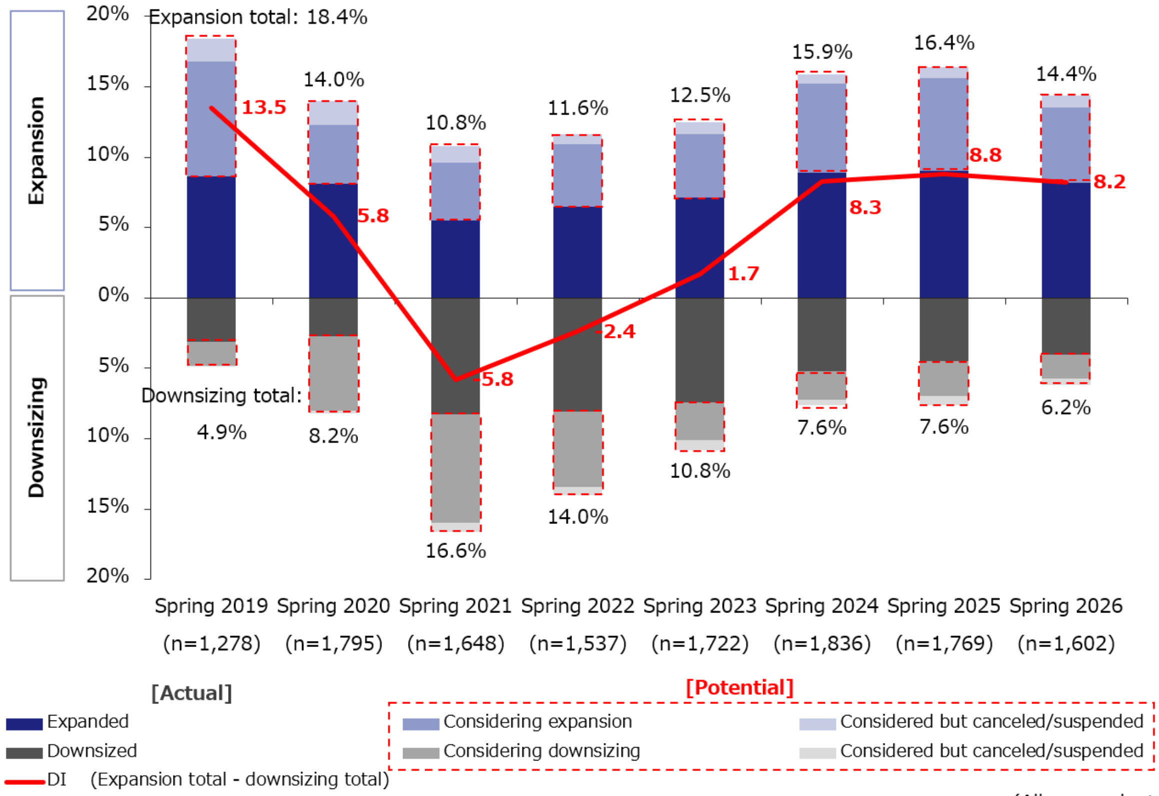
Continued expansionary trend in office size change (actual + potential)

Even if office size had remained unchanged over the past year, when we view the percentage of “considering expansion” and “considered but cancelled or suspended” as the percentage of “potential expansion,” the total “expansion (actual + potential)” was 14.4% (Figure 7). Similarly, the total for “Downsizing (actual + potential)” was 6.2%.

The downsizing trend has weakened since reaching bottom in the Spring 2021 survey. Expansion has outweighed downsizing since the Spring 2023 survey. The DI has remained largely flat at 8.2 since the Spring 2024 survey, indicating that the expansionary trend is continuing.

While there is a certain level of demand for space adjustments, as indicated by “potential expansion or downsizing,” companies that canceled or suspended expansion or downsizing plans (n=22) frequently cited “high costs” and “inability to find vacant space (buildings) that met desired conditions” as reasons. This suggests that, against the backdrop of a market characterized by rising rents and a shortage of vacant space, potential demand may not be materializing.

Figure 7: Change in Office Size Over Past Year (Actual + Potential)



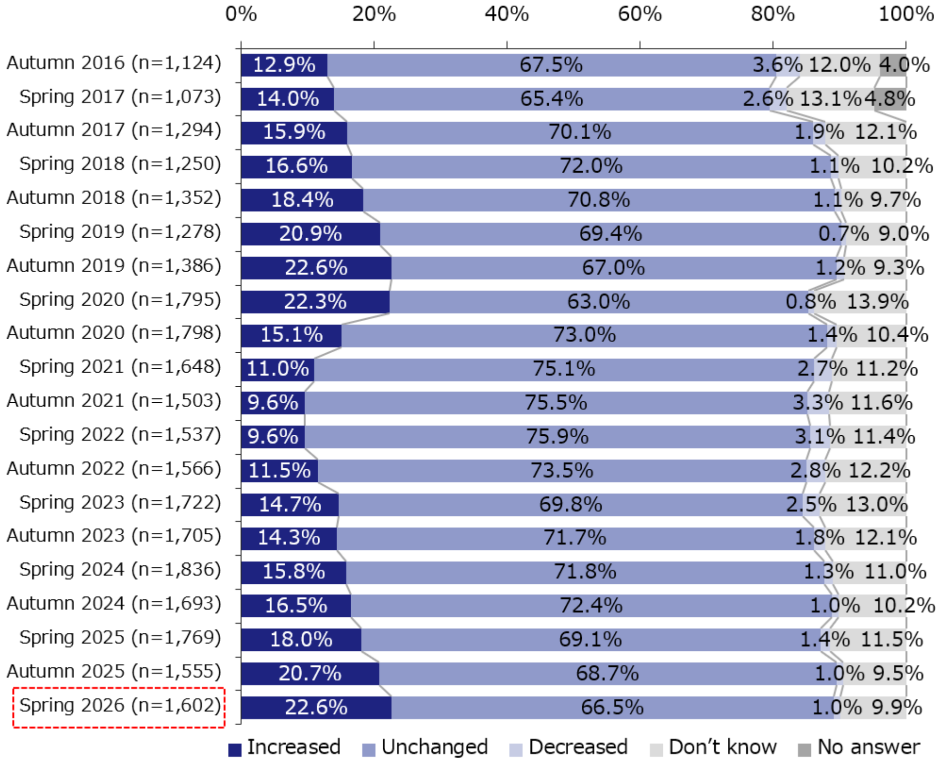
(All respondents)

22.6% of companies reported increase in rent per tsubo, significantly higher than the percentage of those that reported a decrease

In terms of changes in rent per tsubo, 22.6% of companies said it “increased,” significantly exceeding the 1.0% that reported it “decreased” (Figure 8 (red box)).

Since the Spring 2022 survey, the percentage of “Increased” has continued to rise, reaching a record high in this survey—tying the record set in the Autumn 2019 survey.

Figure 8: Change in Rent per Tsubo



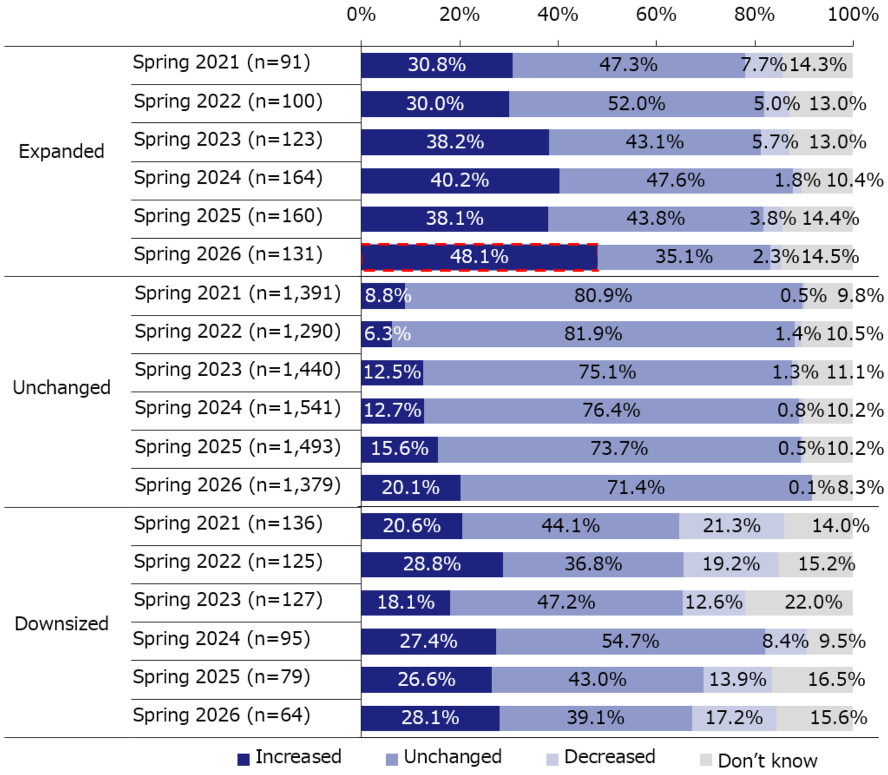
(All respondents)

Among companies that expanded, 48.1% reported increase in rent per tsubo

Examining changes in rent per tsubo by changes in office size revealed that the percentage of companies reporting an increase in rent per tsubo (48.1%) was higher among those that “expanded” their office size than among other groups.

It is possible that factors such as improvements to the office environment and a reassessment of location conditions, rather than simply an expansion of floor space, are influencing this trend (Figure 9).

Figure 9: Change in Rent per Tsubo – By Change in Office Size



(All respondents; excerpt)

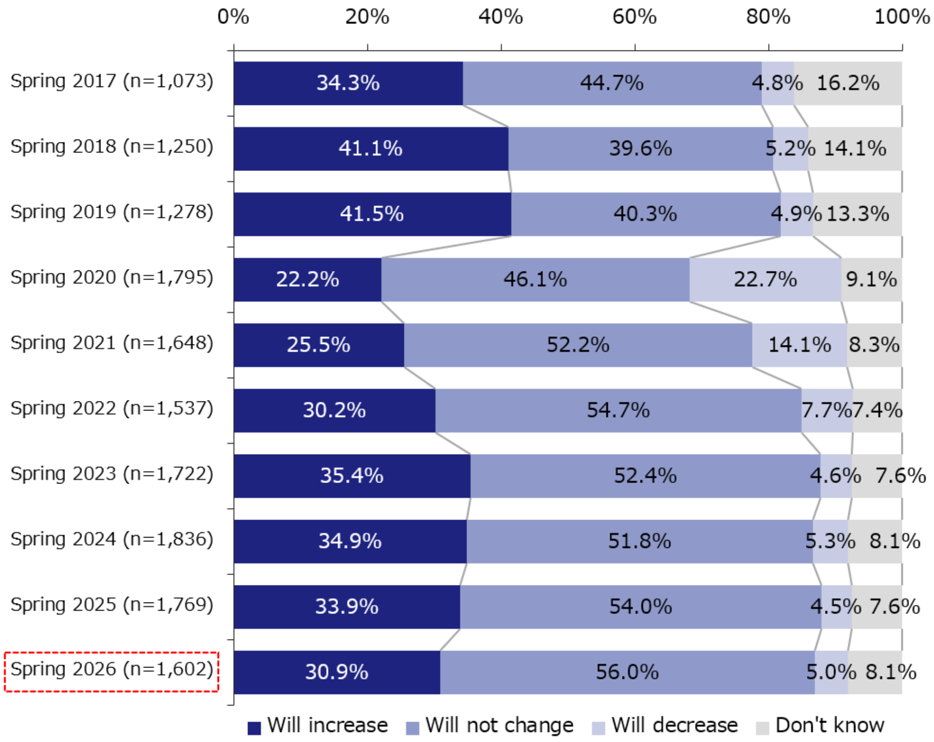
30.9% of companies expect office occupants to increase in future. Gradually declining since the Spring 2023 survey.

In terms of the future number of office occupants* (up to 1–2 years ahead), 30.9% of the companies said it "will increase," while 5.0% said it "will decrease." Since the Spring 2021 survey, the percentage of companies expecting an increase has consistently exceeded those expecting a decrease (Figure 10).

However, the percentage of companies expecting an increase has been gradually declining since the Spring 2023 survey.

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

Figure 10: Future Number of Office Occupants (*For comparison charts by attribute, see [Appendix 2] at the end of the web page (in Japanese only))



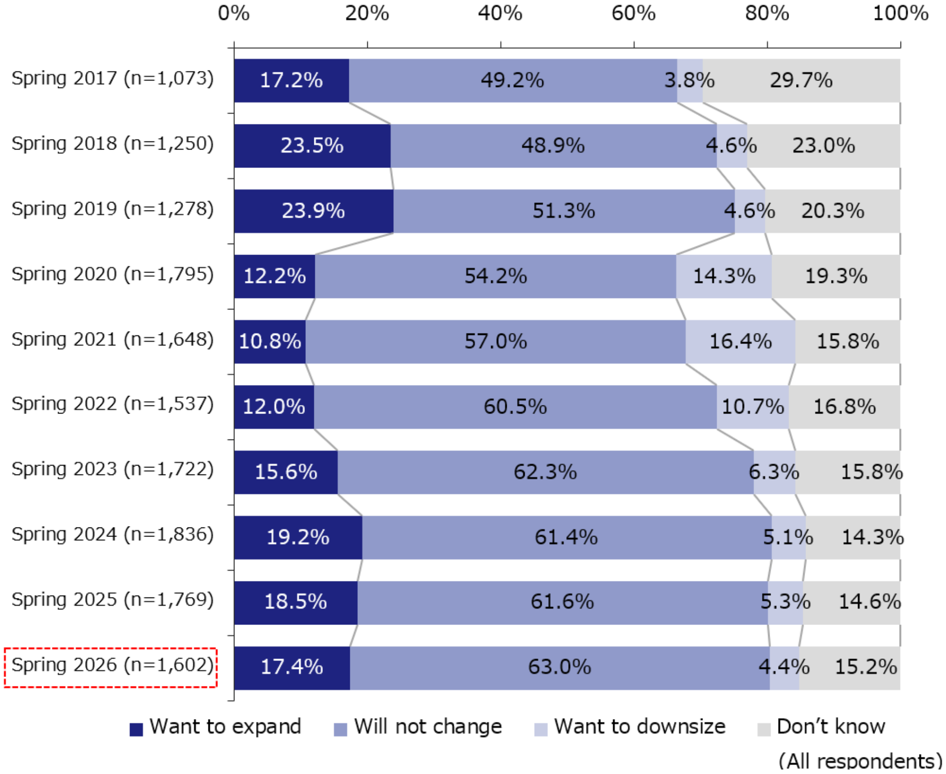
(All respondents)

“Want to expand” has remained flat after having increased since the Spring 2021 survey

In terms of future office size (up to 2–3 years ahead), 17.4% of the companies said they “want to expand,” more than those who said they “want to downsize” (4.4%) (Figure 11).

Over time, the percentage of companies that “want to expand” rose after hitting a low in the Spring 2021 survey but has remained largely flat since the Spring 2024 survey, showing no significant changes.

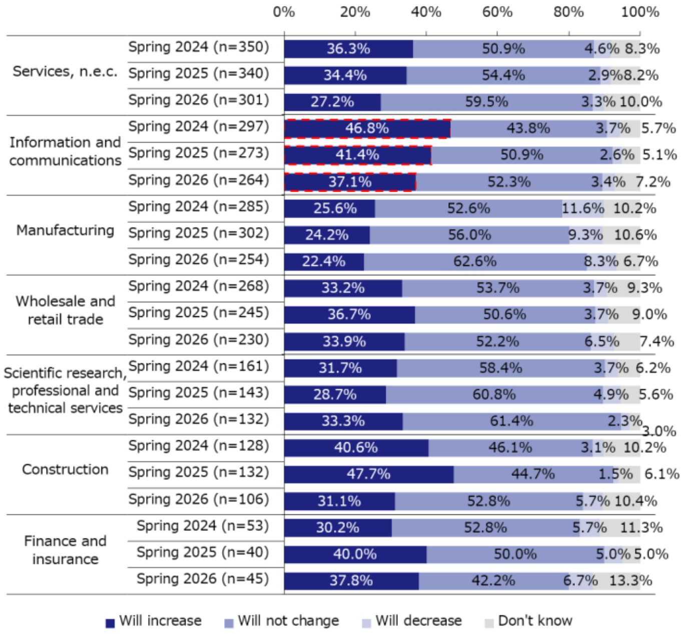
Figure 11: Future Change in Office Size (*For comparison charts by attribute, see [Appendix 3] at the end of the web page (in Japanese only))



Office occupant increase and office size expansion intentions trending downward in information and communications sector

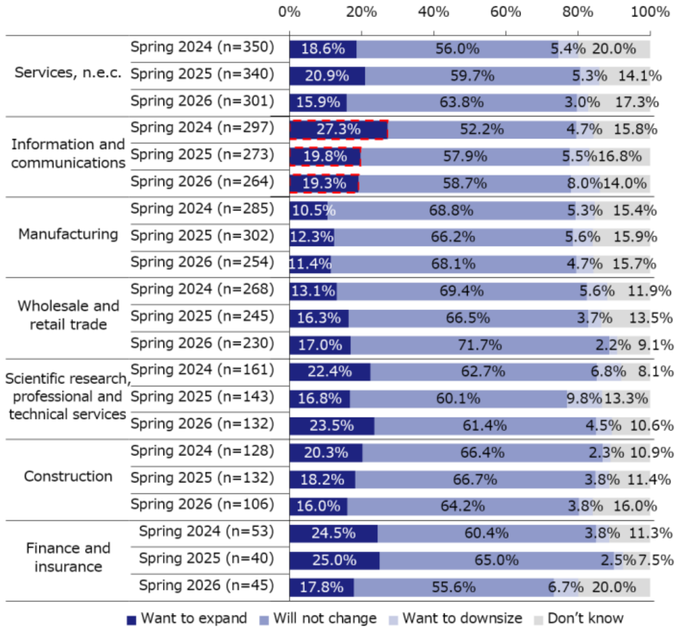
Here, we compare companies' intentions for their future number of office occupants and office size by sector (Figures 12 and 13). In the information and communications sector, while 46.8% of companies indicated that their number of office occupants "will increase" in the Spring 2024 survey, this figure dropped to 37.1% in the Spring 2026 survey. Furthermore, the percentage of companies that indicated they "want to expand" office space also declined from 27.3% in the Spring 2024 survey to 19.3% in the Spring 2026 survey, suggesting that intentions regarding staff increases and office expansion in the information and communications sector are stabilizing compared to past surveys.

Figure 12: Future Number of Office Occupants – By Sector



(All respondents; excerpt)

Figure 13: Future Change in Office Size – By Sector



(All respondents; excerpt)

“Relocation” most popular style for intention to expand or downsize

When we asked companies that “want to expand” their office size how they will do so, the top reply was “Relocation” (45.7%) (Figure 14).

"Relocation” (50.7%) was also the top reply for downsizing (Figure 15).

Figure 14: Style of Future Expansion

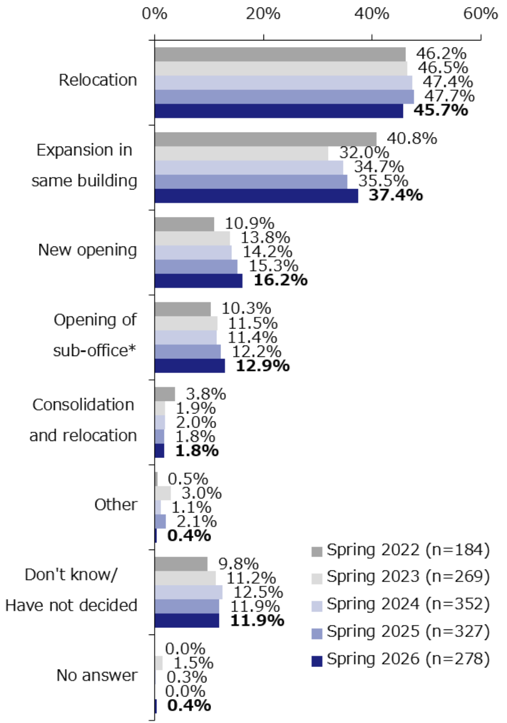
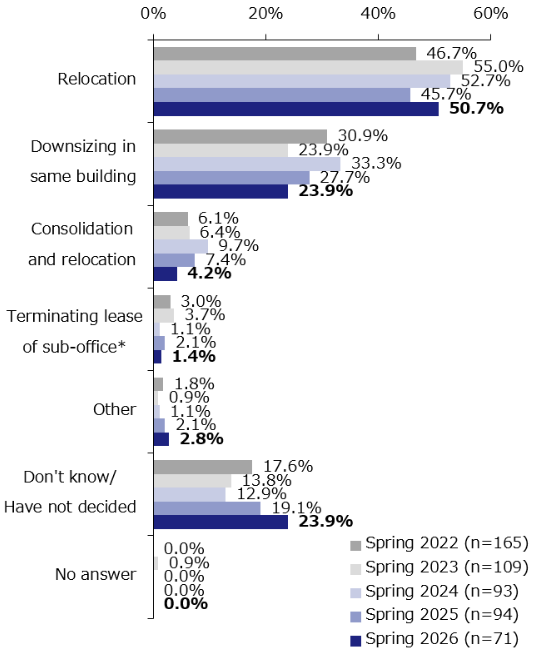


Figure 15: Style of Future Downsizing



(Figure 14: Companies that want to expand; MA; optional response)
(Figure 15: Companies that want to downsize; MA; optional response)

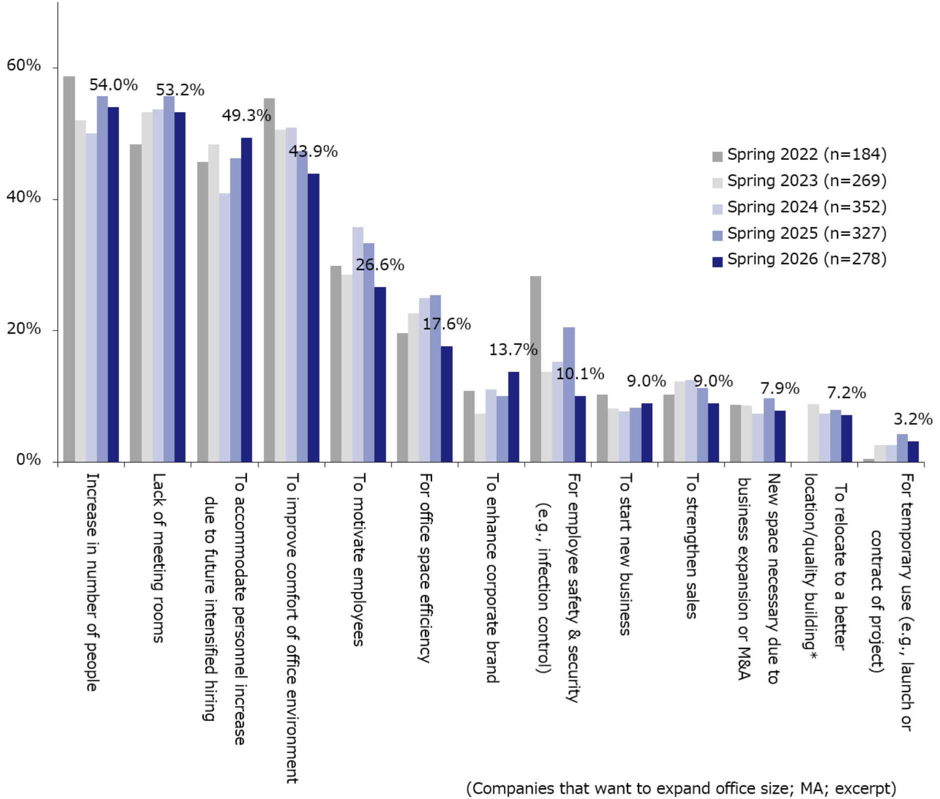
*Sub-office: A separate office located near the main office (e.g., head office) to handle some of its functions

Top reasons for wanting to expand: “Increase in number of people” and “Lack of meeting rooms,” both accounting for a majority

The top reasons cited for wanting to expand office space were “Increase in number of people” (54.0%) and “Lack of meeting rooms” (53.2%), both of which accounted for a majority (Figure 16).

The next most common reason, “To accommodate personnel increase due to future intensified hiring” (49.3%), has been on an upward trend since the Spring 2024 survey, indicating a growing need for expansion in anticipation of hiring.

Figure 16: Reason for Future Expansion



(Companies that want to expand office size; MA; excerpt)
*No chart for the years in which the choice did not exist.

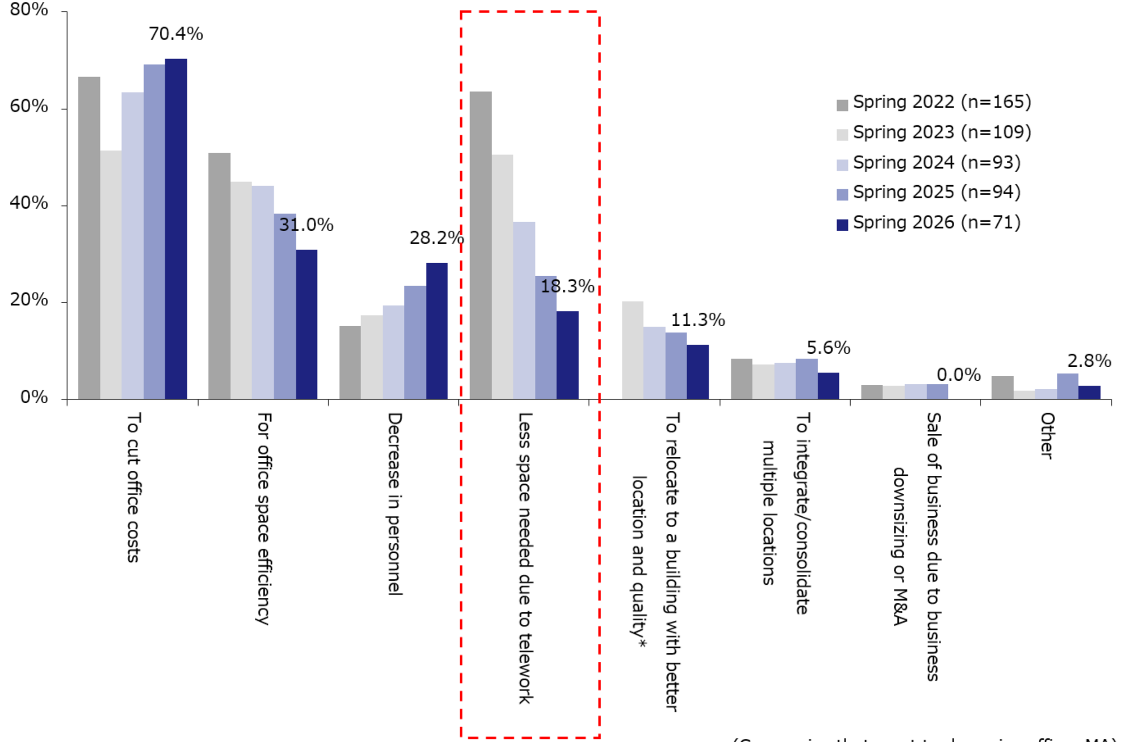
Top reason for wanting to downsize: “To reduce office costs”

As for reasons for downsizing, the highest percentage of companies cited “To reduce office costs” (70.4%), significantly leading the second-place reason and all others (Figure 17).

”Less space needed due to telework” has been declining in percentage every year, standing at just 18.3% this time. During the COVID pandemic, when telework spread rapidly, office space was adjusted to suit work styles, but this trend is likely to have come to an end.

Meanwhile, while “For office space efficiency” and “To relocate to a building with better location and quality” are on a downward trend, “Decrease in personnel” is on the rise, indicating a growing trend toward readjusting office size to align with headcount and costs rather than changes in work styles.

Figure 17: Reason for Future Downsizing



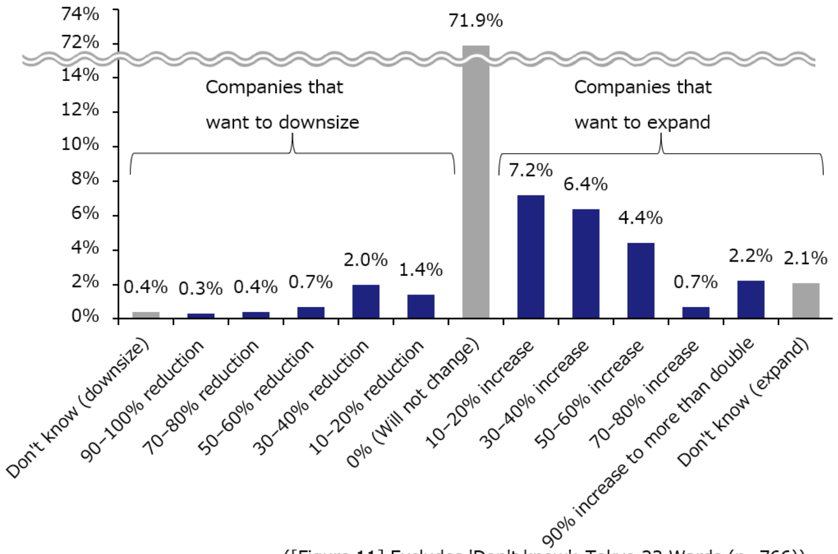
(Companies that want to downsize office; MA)
*No chart for the years in which the choice did not exist.

A large proportion of companies in Tokyo 23 Wards with intention to expand office space consider “10–20% increase”

We asked companies that “want to expand” or “want to downsize” their office space in the future how much they would like to increase or reduce their office space compared to their current offices and summarized the distribution of the percentage of increase or decrease in office area by office location (Figures 18 to 21).

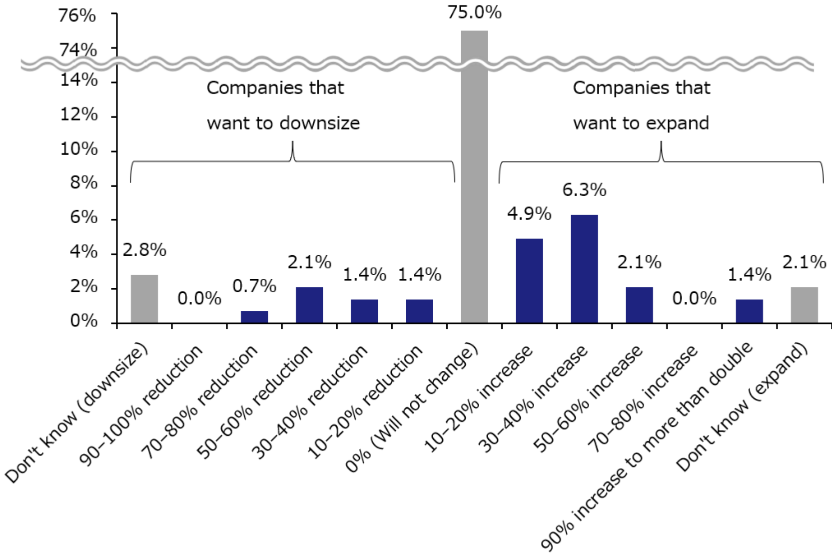
In Tokyo’s 23 wards, the largest group of responding companies—7.2% of the total—planned a “10–20% increase” of their office space. In addition, a significant number of companies indicated increases of 30–40% (6.4%) and 50–60% (4.4%). Regarding plans to downsize, the largest group of companies (2.0%) anticipated a “30–40% reduction.” In Osaka City, companies planning a “30–40% increase” accounted for the largest share, at 6.3% of all responding companies.

Figure 18: Distribution of Percentage of Increase/Decrease from Current Office Space – Tokyo 23 Wards



([Figure 11] Excludes 'Don't know'; Tokyo 23 Wards (n=766))

Figure 19: Distribution of Percentage of Increase/Decrease from Current Office Space – Osaka City

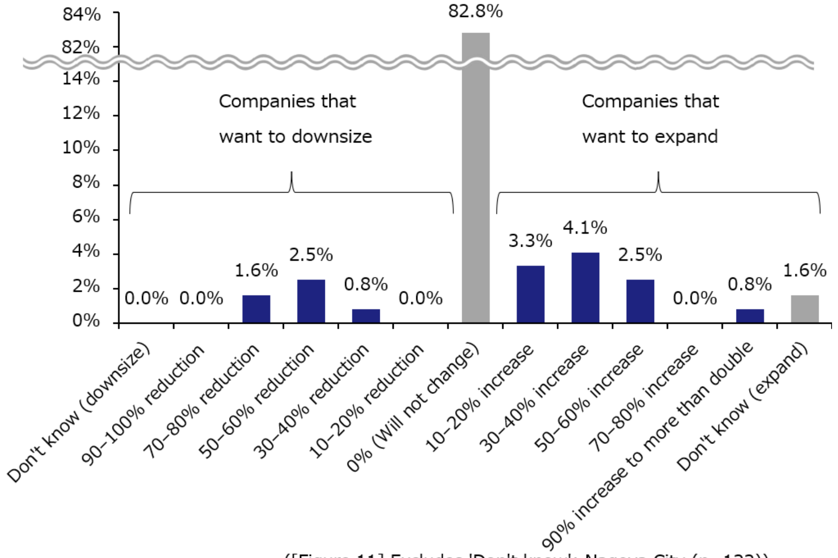


([Figure 11] Excludes 'Don't know'; Osaka City (n=144))

A large proportion of companies in Nagoya City with intention to expand office space consider “30–40% increase”

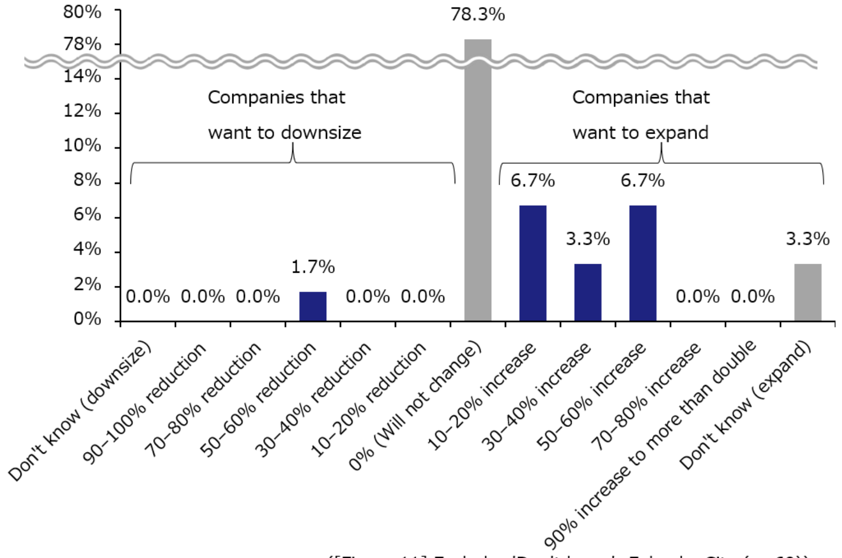
In Nagoya City, the proportion of companies anticipating a “30–40% increase” was the highest, accounting for 4.1% of all responding companies. In Fukuoka City, the proportions of companies anticipating a “10–20% increase” and a “50–60% increase” were both 6.7% of all responding companies, tying for first place.

Figure 20: Distribution of Percentage of Increase/Decrease from Current Office Space – Nagoya City



([Figure 11] Excludes 'Don't know'; Nagoya City (n=122))

Figure 21: Distribution of Percentage of Increase/Decrease from Current Office Space – Fukuoka City



([Figure 11] Excludes 'Don't know'; Fukuoka City (n=60))

2. Factors affecting office demand

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

75.2% of companies still adopt telework

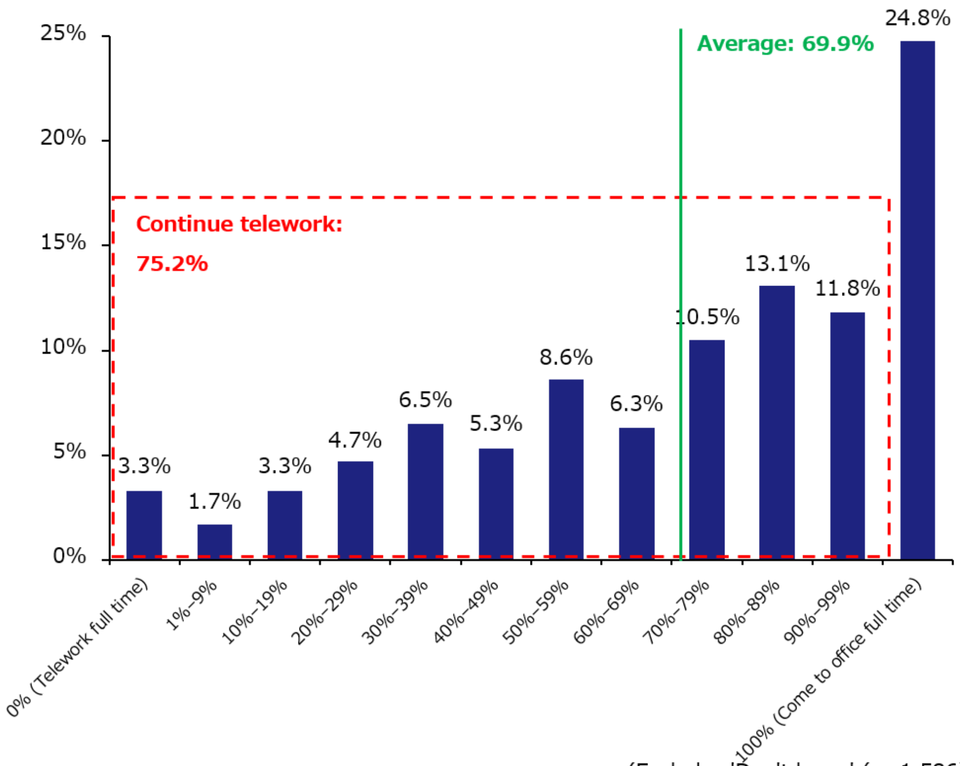
With a coming-to-office ratio of 100% meaning all employees came to the office, we asked companies' "current average coming-to-office ratio" (Figure 22).

At the time of the survey, 24.8% of the companies reported "100% (Come to office full time)," indicating that the remaining 75.2% continued to adopt telework to varying degrees.

The average value* was 69.9%.

*The average value was calculated from the median figure of the range of each choice: 5% for "1%–9%," 14.5% for "10%–19%," 24.5% for "20%–29%," etc.

Figure 22: Actual Coming-to-Office Ratio



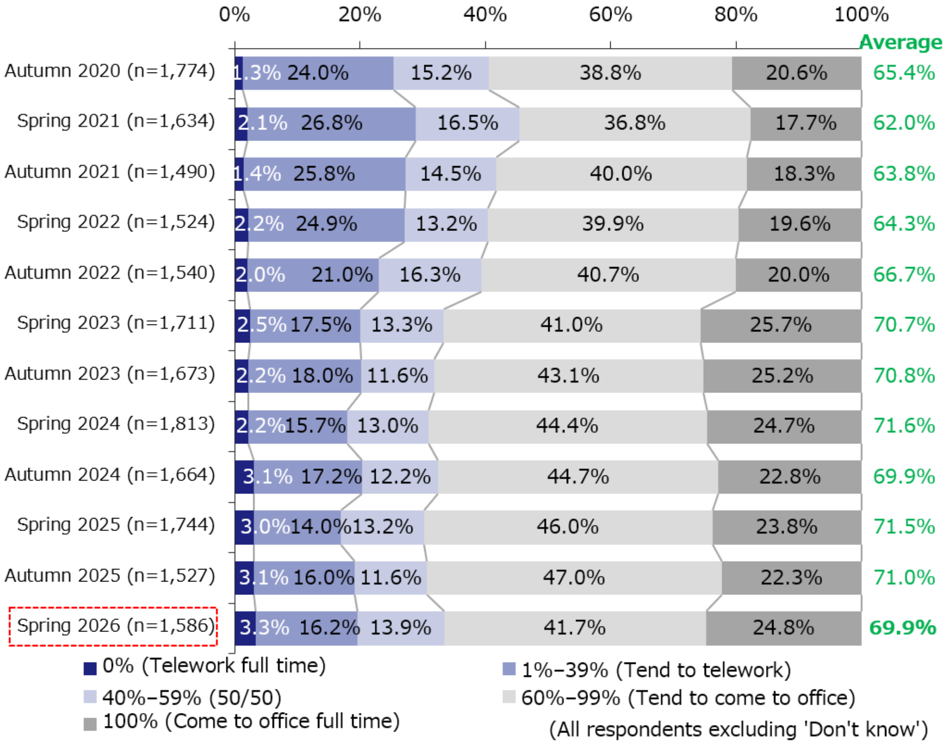
(Excludes 'Don't know' (n=1,586))

Average coming-to-office ratio stabilizing at approx. 70% since Spring 2023

We divided the coming-to-office ratio of Figure 22 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 23).

Since the transition of COVID-19 to a Class 5 infectious disease (i.e., since the Spring 2023 survey), the average coming-to-office ratio has remained around 70%. However, the breakdown has changed slightly. “60%–99% (Tend to come to office)” decreased by 5.3 points in this survey compared to the Autumn 2025 survey, while “40%–59% (50/50)” and “100% (Come to office full time)” showed slight increases.

Figure 23: Actual Coming-to-Office Ratio (Comparison over Time) (*For comparison charts by attribute, see [Appendix 4] at the end of the web page (in Japanese only))



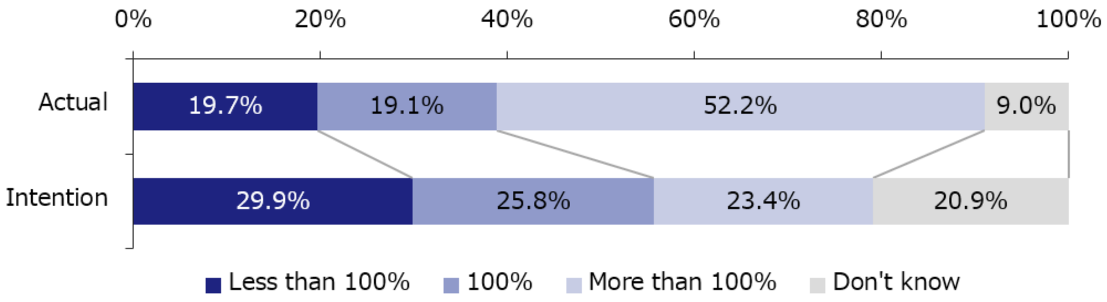
Percentage of desks to office occupants: 29.9% of companies want it below 100%

We calculated the actual percentage of desks that companies provided to their office occupants based on the number of office occupants and desks at the time of the survey, and the intended percentage of desks to the number of office occupants in the future. We then grouped the results into “Less than 100%,” “100%,” and “More than 100%” (Figure 24).

As for the actual percentage, desks provided for “more than 100%” of office occupants were the most common (52.2% of companies).

As for the intended percentage, the percentage of “More than 100%” stood at 23.4%, significantly lower than the actual percentage (52.2%), while “Less than 100%” stood at 29.9%, exceeding the actual percentage (19.7%).

Figure 24: Percentage of Desks to Number of Office Occupants (Actual and Intention)



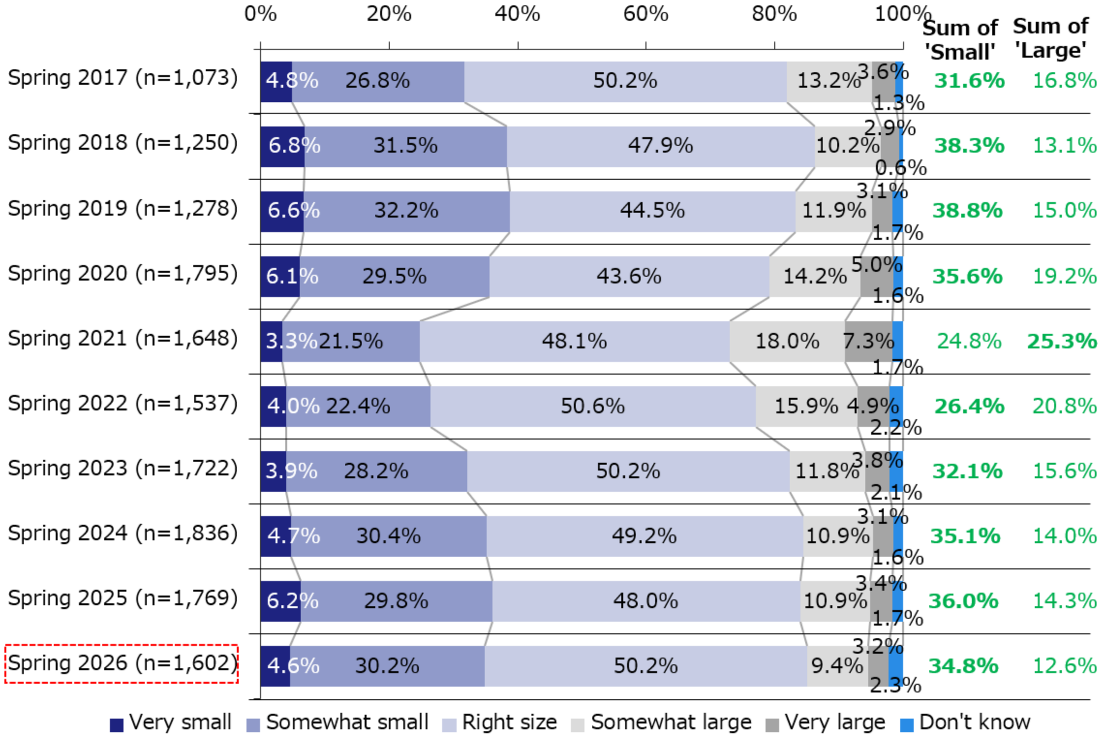
(All respondents (n=1,602))

Perception of office size: Sum of “Very small” and “Somewhat small” 34.8%

When we asked respondents’ perception of the size of their current office, the combined percentage of “very small” and “somewhat small” (34.8%) exceeded the combined percentage of “very large” and “somewhat large”(12.6%) (Figure 25).

Compared to past surveys, “(Very/somewhat) small” increased from the Spring 2021 survey through the Spring 2024 survey, while “(Very/somewhat) large” decreased. Both figures have remained flat since the Spring 2024 survey.

Figure 25: Perception of Office Size



(All respondents (n=1,602))

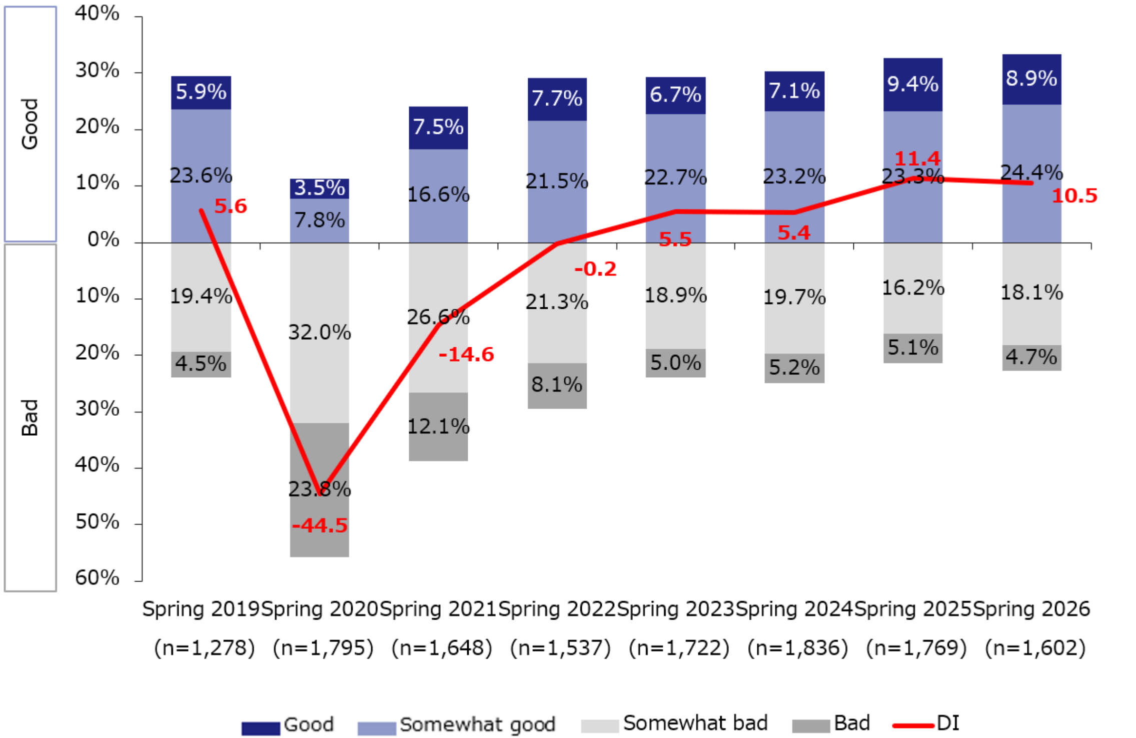
Business sentiment DI at 10.5, remaining in positive territory since Spring 2023

Figure 26 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 33.3%, and that of “Bad” and “Somewhat bad” was 22.8%.

Although the DI has remained in positive territory since the Spring 2023 survey, the current survey shows a value of 10.5, indicating that the momentum of recovery seen since the Spring 2020 survey is beginning to level off.

Figure 26: Business Sentiment



(All respondents; excerpt)

3. Work styles and the workplace

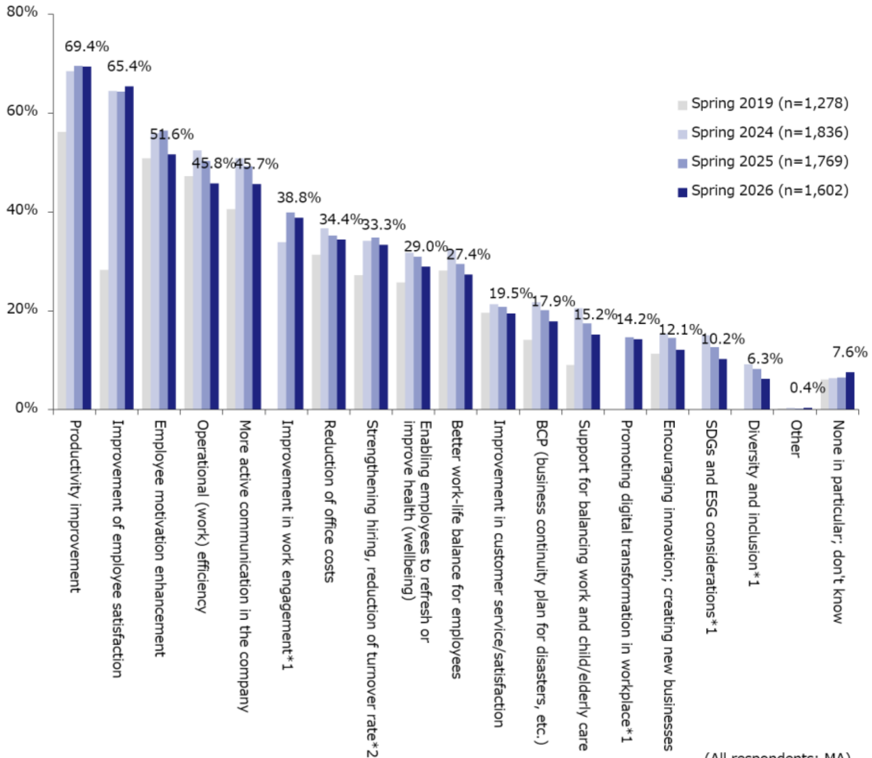
1. Usage, evaluation, and issues of the main office
2. Work styles and telework
3. Workplace strategies, evaluation, and issues
4. Status of Generative AI Adoption and Impact

Major focuses when implementing office strategies have diversified compared to before the COVID-19 pandemic

When we asked companies their major focuses when implementing office strategies, the top response was “Productivity improvement” (69.4%) (Figure 27).

Compared to the Spring 2019 survey, which was conducted before the outbreak of the pandemic, the Spring 2024 survey showed an increase in the percentage for all items, suggesting that the expected roles of offices have expanded in the wake of the pandemic. In the Spring 2026 survey, while some items showed a slight decline from that level, many items maintained levels higher than those in the Spring 2019 survey. In particular, “Productivity improvement” and “Improvement of employee satisfaction” have maintained high levels.

Figure 27: Major Focuses When Implementing Office Strategies



(All respondents; MA)
*1 No chart for the year in which the choice did not exist.
*2 For Spring 2019, the percentage of companies that chose either Strengthening hiring' or 'Reduction of turnover rate'

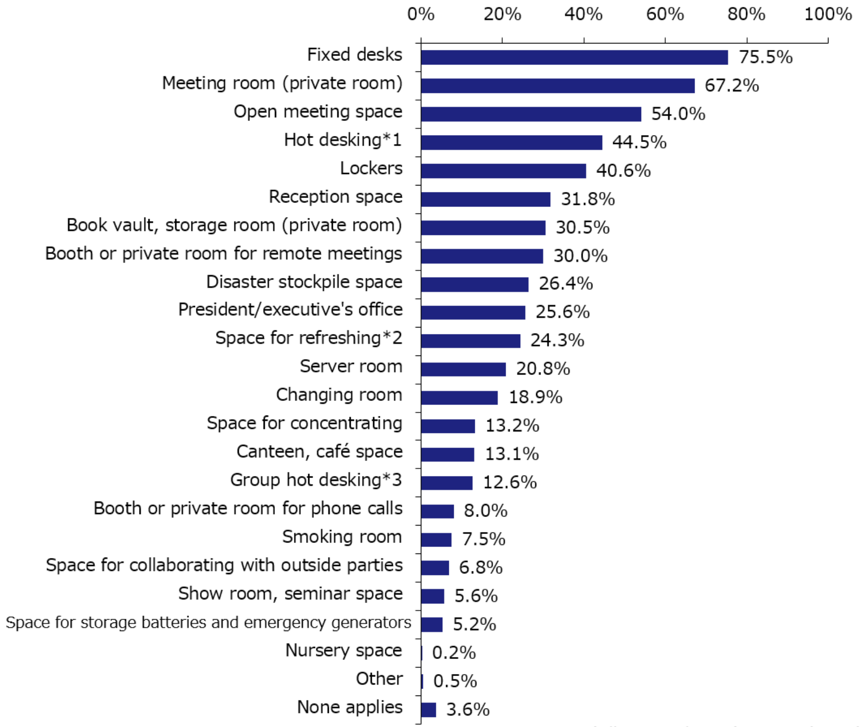
Top responses: “Fixed desks” and “Meeting room (private room),” followed by “Open meeting space”

We asked companies about the various spaces currently available in their main office.*

The top responses were “Fixed desks” (75.5%) and “Meeting room (private room)” (67.2%), followed by “Open meeting space” (54.0%) (Figure 28).

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

Figure 28: Spaces Currently Available in the Office



(All respondents (n=1,602); 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 activating 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

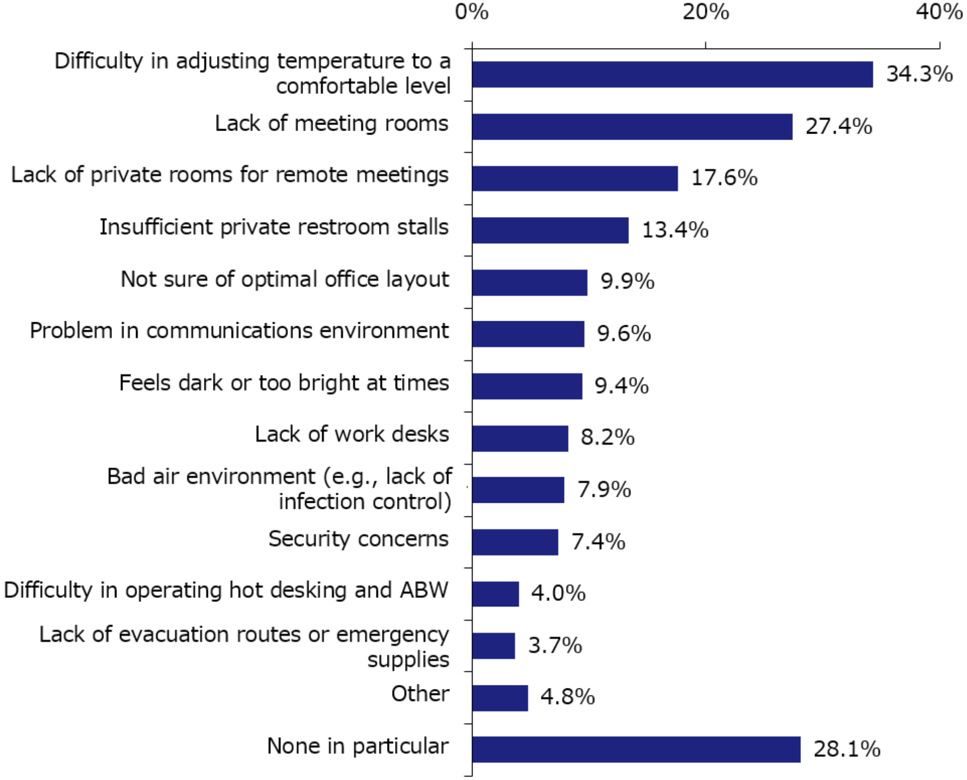
Top issues of main office: “Lack of meeting rooms,” “Lack of private rooms for remote meetings”

The top issue felt by companies concerning their current main office was “Difficulty in controlling the temperature to a comfortable level” (34.3%) (Figure 29).

This was followed by “Lack of meeting rooms” (27.4%) and “Lack of private rooms for remote meetings” (17.6%), indicating a lack of meeting space as hybrid work takes hold. The lack of meeting rooms was also cited as one of the top reasons for wanting to expand office space (Figure 16) and may affect future office demand.

Ranking fourth was “Insufficient private restroom stalls” (13.4%). Together with meeting rooms, ensuring sufficient facilities and spaces that employees use on a daily basis is considered crucial for creating a comfortable office environment.

Figure 29: Issues Felt in Current Main Office



(All respondents (n=1,602); MA)

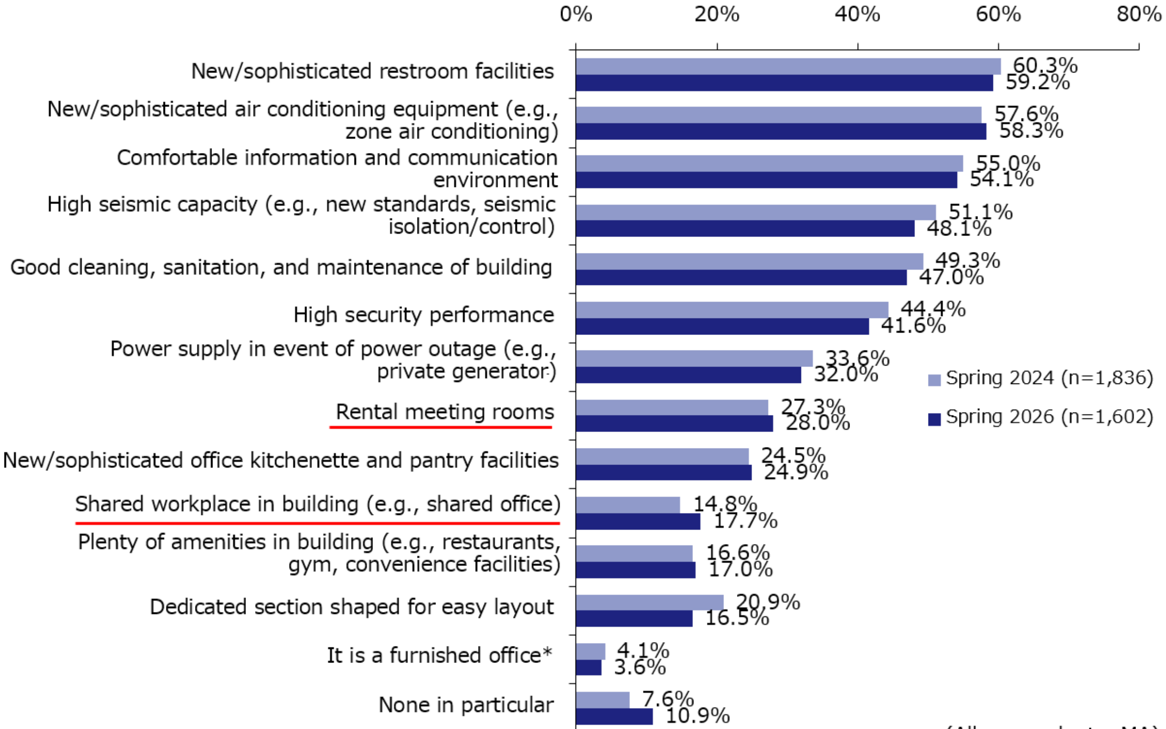
Requirements for buildings: In terms of facilities and functions, basic items such as “restroom” and “air conditioning” rank high

We surveyed respondents on the desirable requirements for a property housing their main office, dividing them into three categories: “Facilities and Functions,” “Location and Scale,” and “Sustainability” (Figures 30, 31, and 32).

In the “Facilities and Functions” category, basic items continued to rank highest as they did in the Spring 2024 survey, including “New/sophisticated restroom facilities” (59.2%), “New/sophisticated air conditioning equipment (e.g., zone air conditioning)” (58.3%), and “Comfortable information and communication environment” (54.1%) (Figure 30).

Additionally, although the percentage was not high, “Shared workspace in building (e.g., shared office)” (17.7%)—a relatively new value standard—saw an increase from the Spring 2024 survey. “Rental meeting rooms” (28.0%) also garnered a certain level of support, suggesting growing interest in shared workspaces within buildings.

Figure 30: Desirable Requirements in the Building for Main Office (Facilities and Functions)



(All respondents; MA)

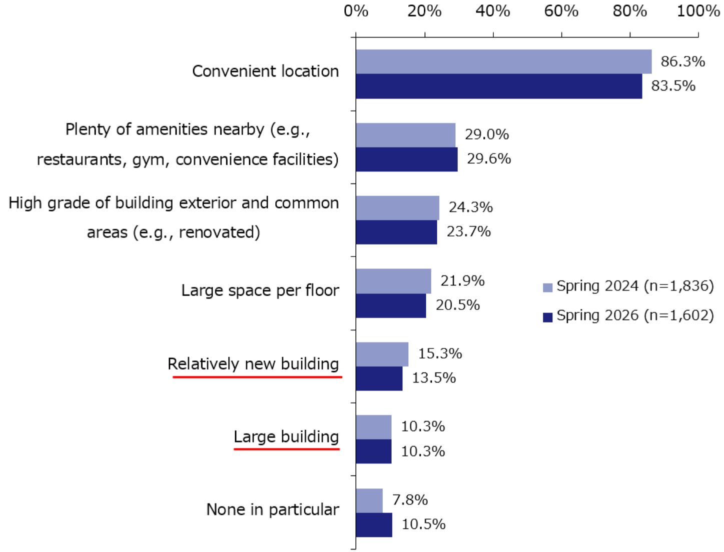
*Furnished office: A type of leased office for which the lessor provides some interior fittings beforehand, such as for the reception area and meeting rooms, enabling tenants to cut relocation costs.

Requirements for buildings: In terms of location and scale, “Relatively new building” and “Large building” rank low

In the “Location and Scale” category, there were no significant changes from the Spring 2024 survey. While “Convenient location” (83.5%) received overwhelming support, two items considered basic building specifications—“Relatively new building” (13.5%) and “Large building” (10.3%)—ranked low (Figure 31).

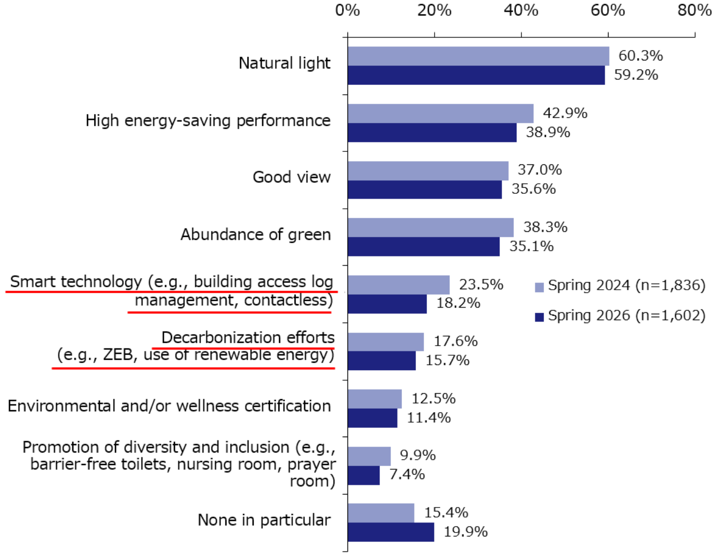
In the “Sustainability” category, “Natural light” (59.2%) and “high energy-saving performance” (38.9%) ranked at the top (Figure 32). In addition, as relatively new value standards, “Smart technology (e.g., building access log management, contactless)” (18.2%) and “Decarbonization efforts (e.g., ZEB, use of renewable energy)” (15.7%) also garnered a certain level of support.

Figure 31: Desirable Requirements in the Building for Main Office (Location and Scale)



(All respondents; MA)

Figure 32: Desirable Requirements in the Building for Main Office (Sustainability)



(All respondents; MA)

More than 30% “want to increase” “meeting room space (private rooms for multiple people, remote meeting rooms for one person)”

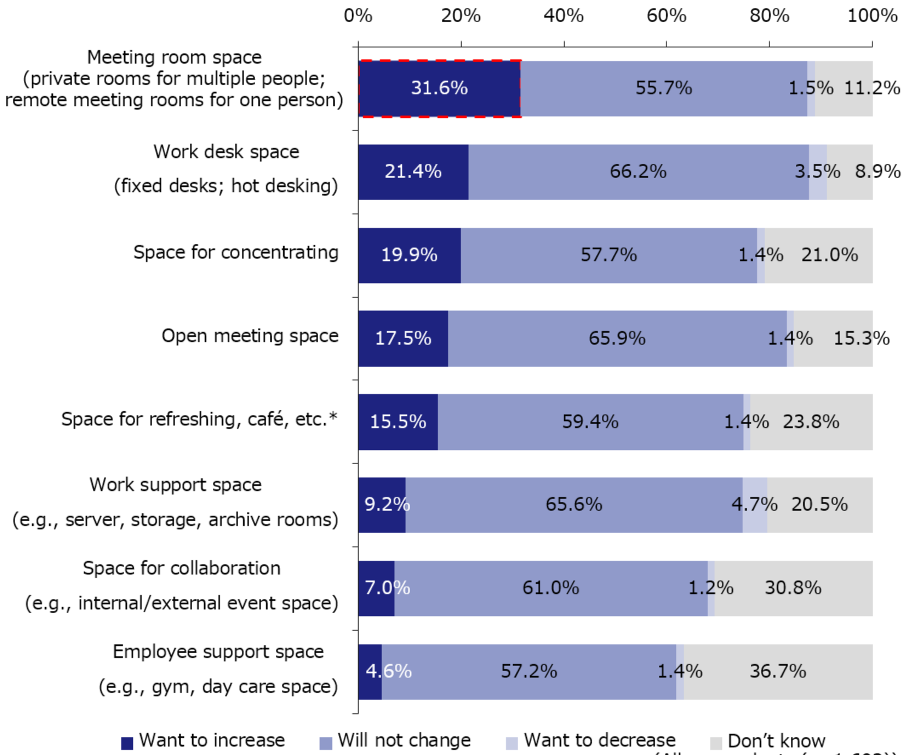
Figure 33 summarizes the responses on the future of each space within the office.

The percentage of companies that “want to reduce” was 5.0% or lower across all spaces, less than the percentage of companies that “want to increase.”

In particular, “Meeting room space (private rooms for multiple people, remote meeting rooms for one person)” gained the highest percentage of “Want to increase” (31.6%), indicating the strong sense of urgency regarding the lack of meeting rooms, which also ranked high in the issues of the main office (Figure 29).

In addition, around 20% of companies indicated they “want to increase” the number of “Work desk space (e.g., fixed desks, hot desking)” (21.4%), “Space for concentrating” (19.9%), and “Open meeting space” (17.5%), indicating demand for a variety of spaces.

Figure 33: Future Changes in Each Space



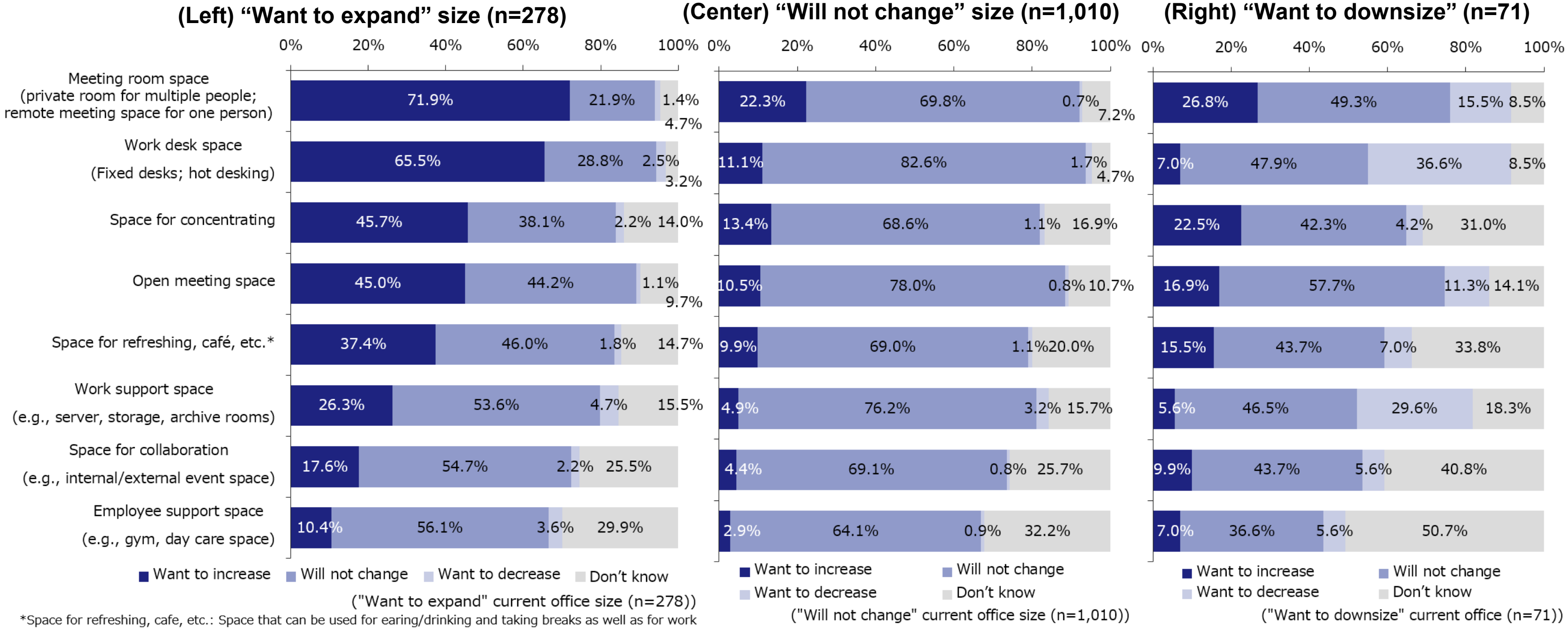
(All respondents (n=1,602))

*Space for refreshing, cafe, etc.: Space that can be used for earing/drinking and taking breaks as well as for work

Even companies looking to downsize may be striving to ensure they have the necessary functions

When analyzing the results of Figure 33 by future changes in office size, it becomes clear that companies that “want to expand” their office space are more likely to “want to increase” the size of each type of space (Figure 34 (left)). However, even among companies that “will not change” their office size, the percentage of “Want to increase” exceeds the percentage of “Want to decrease” for all spaces (Figure 34 (center)). Furthermore, among companies that “want to downsize” their floor space, while there was a strong intention to decrease “work desk space” and “work support space,” the percentage of companies that “want to increase” “meeting room space,” “space for concentrating,” “open meeting space,” and “space for refreshing” exceeded those that “want to decrease” them (Figure 34 (right)). Even companies looking to downsize may still be striving to optimize specific spaces while ensuring they have all the functions they need.

Figure 34: Future Changes in Each Space by Future Change in Office Size



*Space for refreshing, cafe, etc.: Space that can be used for earing/drinking and taking breaks as well as for work

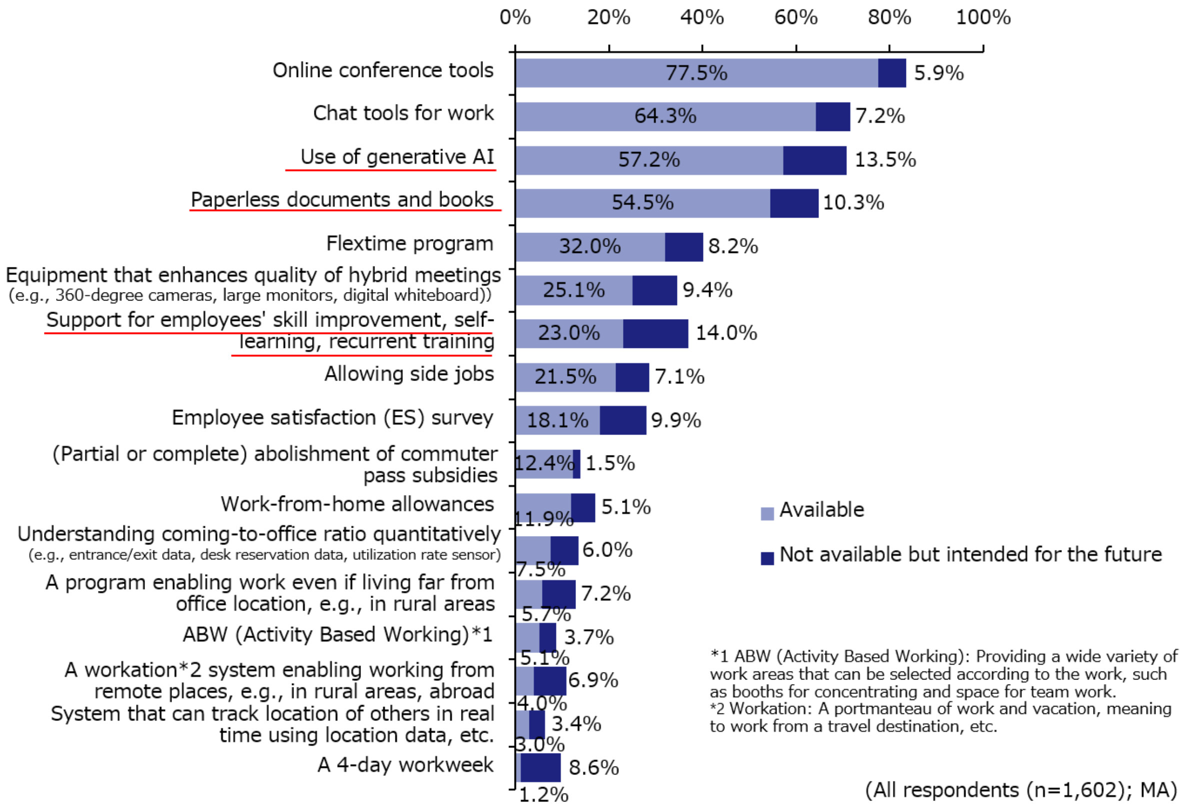
“Use of generative AI” grew significantly; available at 57.2% of companies

Figure 35 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”).

Regarding “Use of generative AI,” while 35.9% reported the tool as available in the Spring 2025 survey (Metropolitan Areas Office Demand Survey Spring 2025 <Detailed Report> Figure 39), the percentage has risen significantly to 57.2% in the current survey.

In addition to “Use of generative AI,” the proportion of companies that indicated it is “not available but intended for the future” exceeded 10% for “Paperless documents and books” and “Support for employees’ skill improvement, self-learning, recurrent training,” suggesting that these initiatives are expected to expand further.

Figure 35: Work Style Initiatives



*1 ABW (Activity Based Working): 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.
*2 Workation: A portmanteau of work and vacation, meaning to work from a travel destination, etc.

(All respondents (n=1,602); MA)

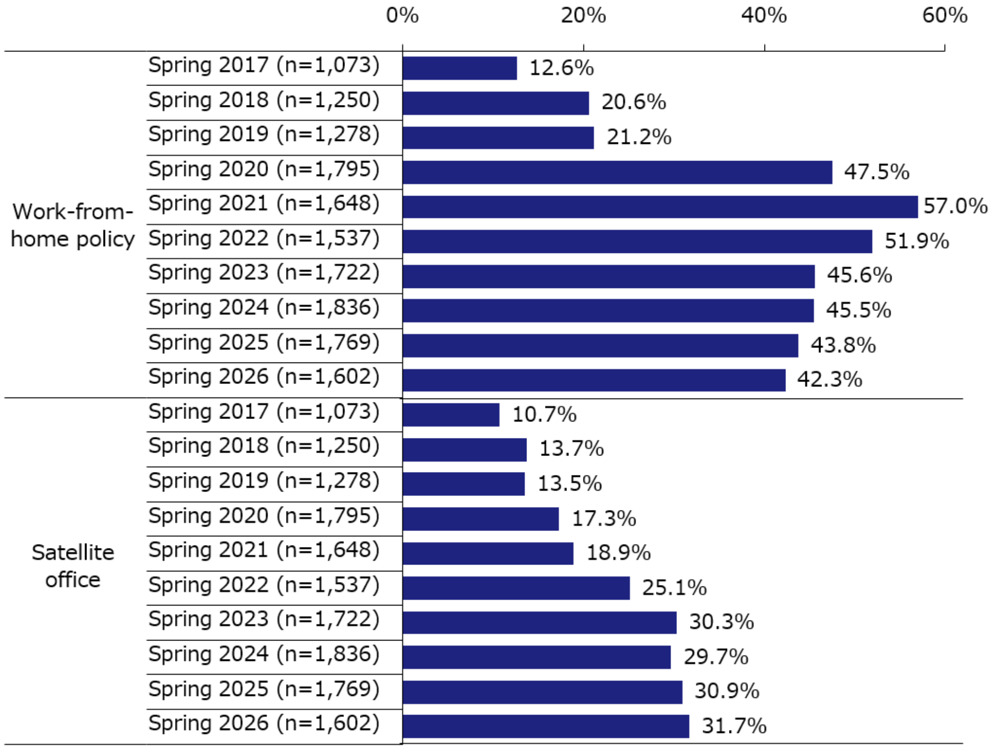
Work-from-home policy gradually declining; satellite office remains flat

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

In this survey, the availability of work-from-home policies stood at 42.3%, showing a gradual downward trend since the Spring 2023 survey. The availability of satellite offices stood at 31.7%, remaining largely flat.

58.4% of all companies offer either a “Work-from-home policy” and/or a “satellite office” (have a place or policy available for telework).

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



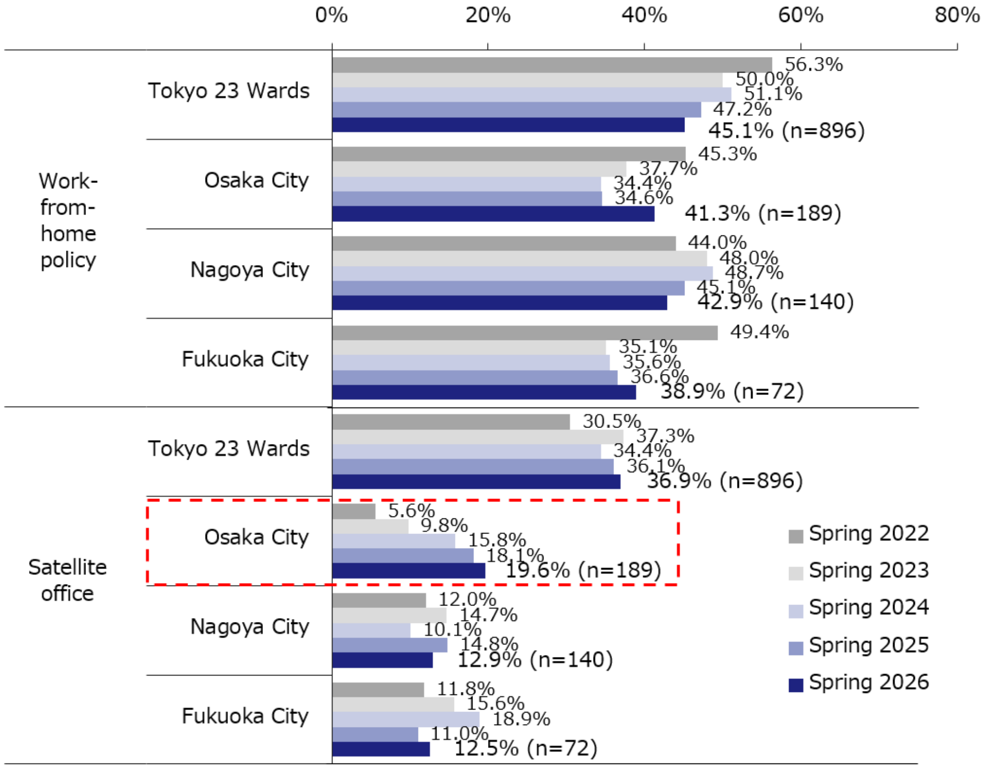
(All respondents; MA; excerpt;reaggregated)

Availability of satellite offices on the rise in Osaka City

Figure 37 shows the changes in the availability of work-from-home policies and satellite offices over time by office location.

As in previous surveys, the availability rate for satellite offices was higher in Tokyo's 23 wards (36.9%) than in other regions. In Osaka City, an upward trend has been observed since previous surveys, with adoption continuing to expand.

Figure 37: Availability of Work-from-Home Policy and Satellite Office – By Office Location



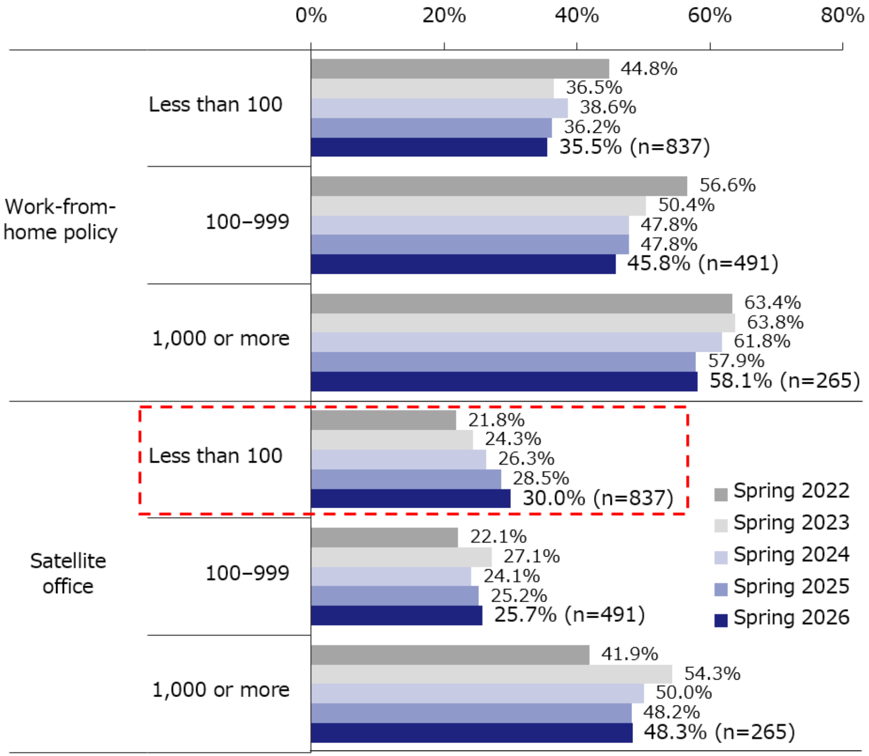
(All respondents; MA; excerpt;reaggregated)

Satellite office availability increasing among small companies every year

By number of employees, the availability of both work-from-home policies and satellite offices was highest among large companies with 1,000 or more employees. This trend has not changed from previous surveys (Figure 38).

However, the availability of satellite offices has continued to grow steadily among small companies (with less than 100 employees). The adoption of satellite offices is expanding in small companies, which account for a large proportion of Japanese companies, indicating that the use of satellite offices is expanding.

Figure 38: Availability of Work-from-Home Policy and Satellite Office – By Number of Employees

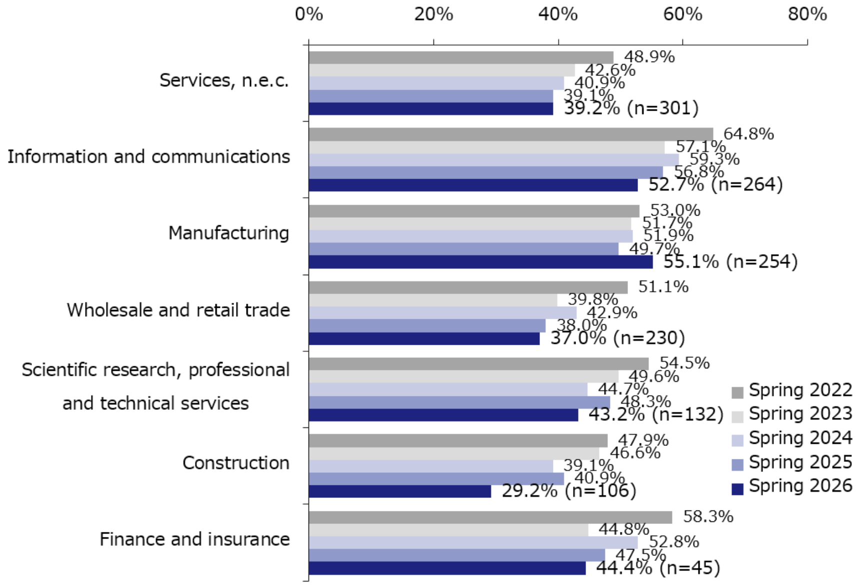


(All respondents; MA; excerpt;reaggregated)

Satellite office availability increasing in "Scientific research, professional and technical services"

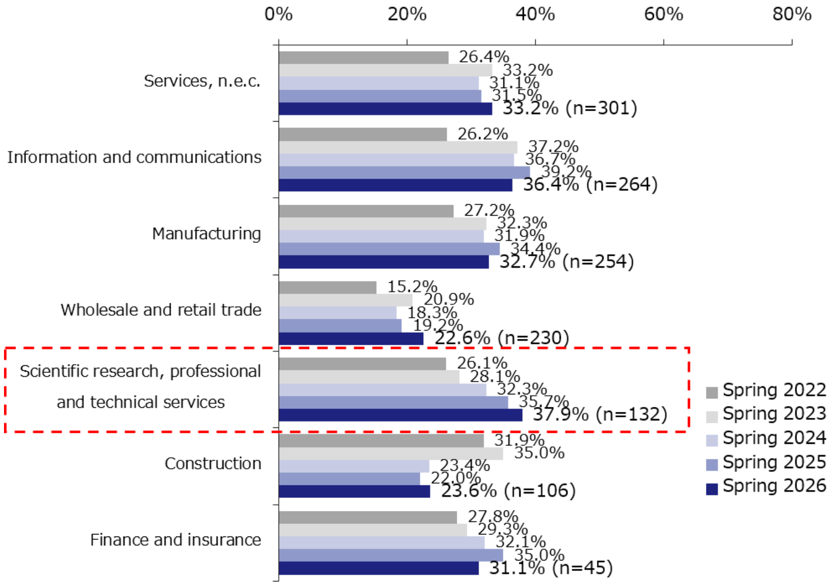
By sector, the availability of satellite offices has changed little over time since the Spring 2023 survey in many sectors but continues to be on the rise in the "Scientific research, professional and technical services" sector (Figure 40).

Figure 39: Availability of Work-from-Home Policy – By Sector



(All respondents; MA; excerpt)

Figure 40: Availability of Satellite Office – By Sector



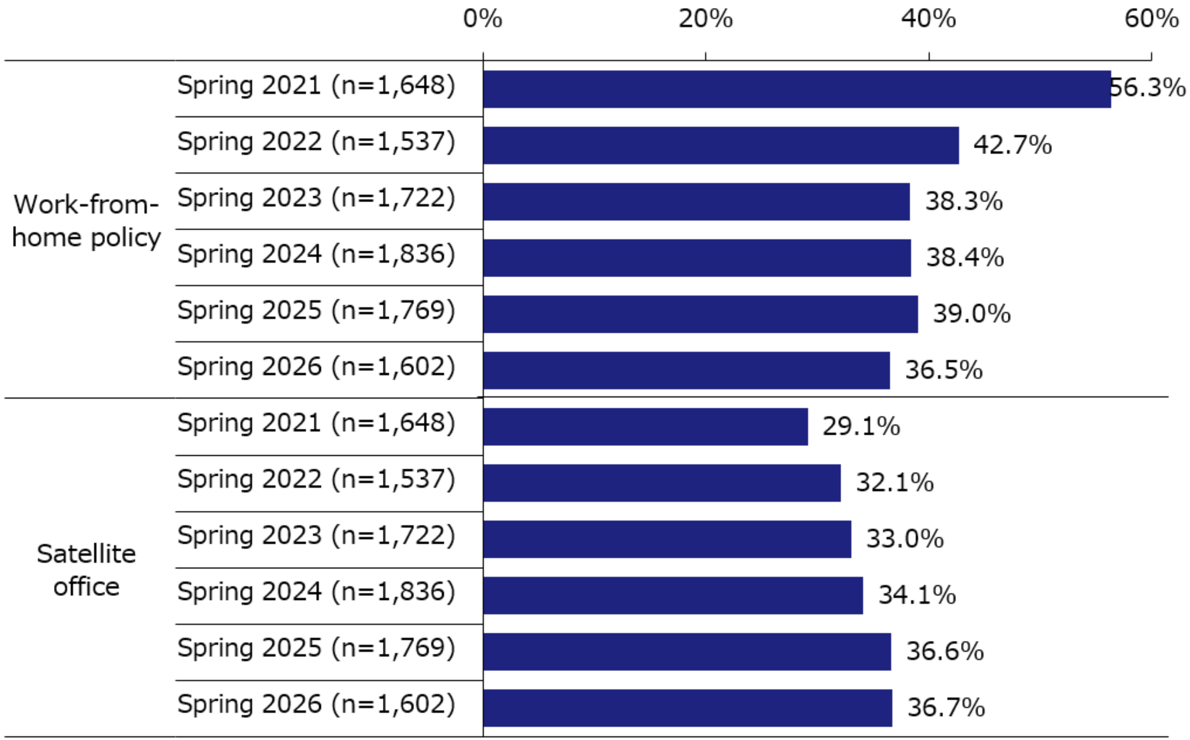
(All respondents; MA; excerpt)

Intent to adopt satellite offices slightly exceeding intent to adopt work-from-home policies

Figure 41 shows the initiative on telework places or policies that companies want to implement in the future (1 to 2 years ahead), regardless of the current situation.

Looking at changes over time, in the Spring 2021 survey, the intention to introduce work-from-home policies was 27.2 percentage points higher than the intention to introduce satellite offices. However, that gap has gradually narrowed, and in this survey, the intention to introduce satellite offices slightly exceeded the intention to introduce work-from-home policies.

Figure 41: Initiatives for Telework Places or Policies to Be Implemented in the Future



(All respondents; MA; excerpt;reaggregated)

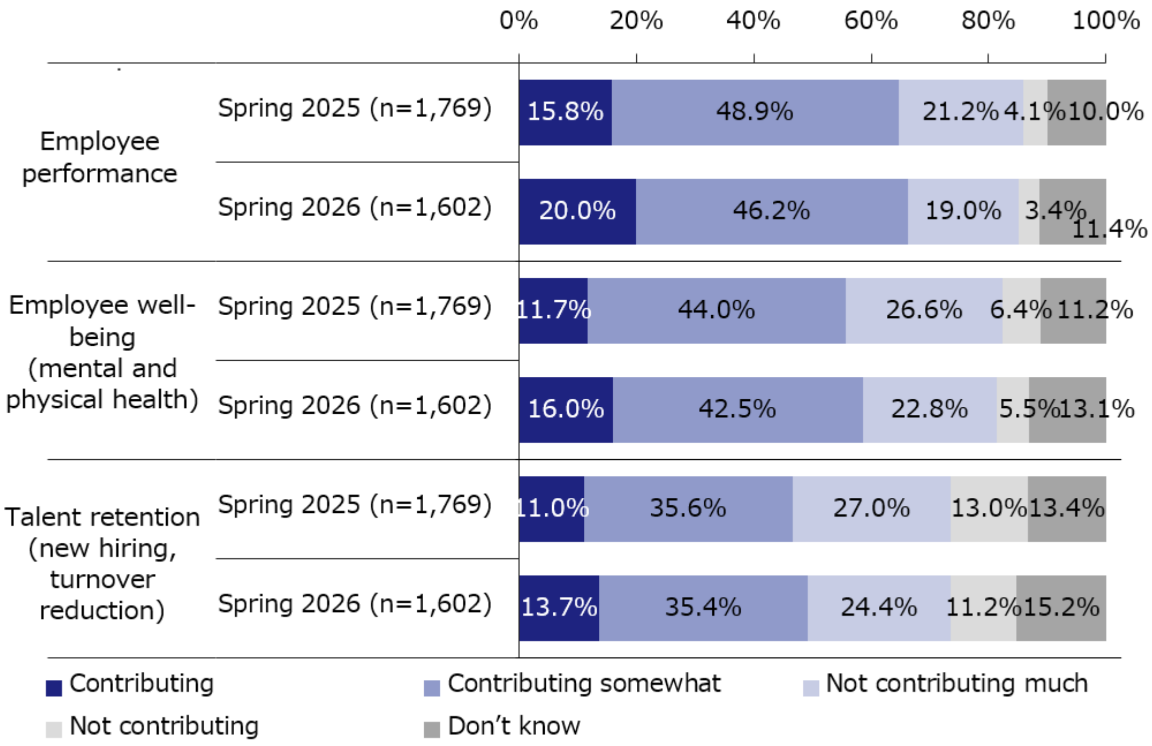
More than 60% say current workplace environment is "contributing (somewhat)" to "employee performance"

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 42).

The percentage of "Contributing (somewhat)" was 66.2% for "employee performance" and 58.5% for "employee well-being (mental and physical health)," with both figures accounting for a majority.

Furthermore, the percentage of companies that answered "Contributing" for each item has increased since the Spring 2025 survey, suggesting that more companies are increasingly recognizing the positive effects of workplace environments.

Figure 42: Level of Contribution to Current Workplace Environment



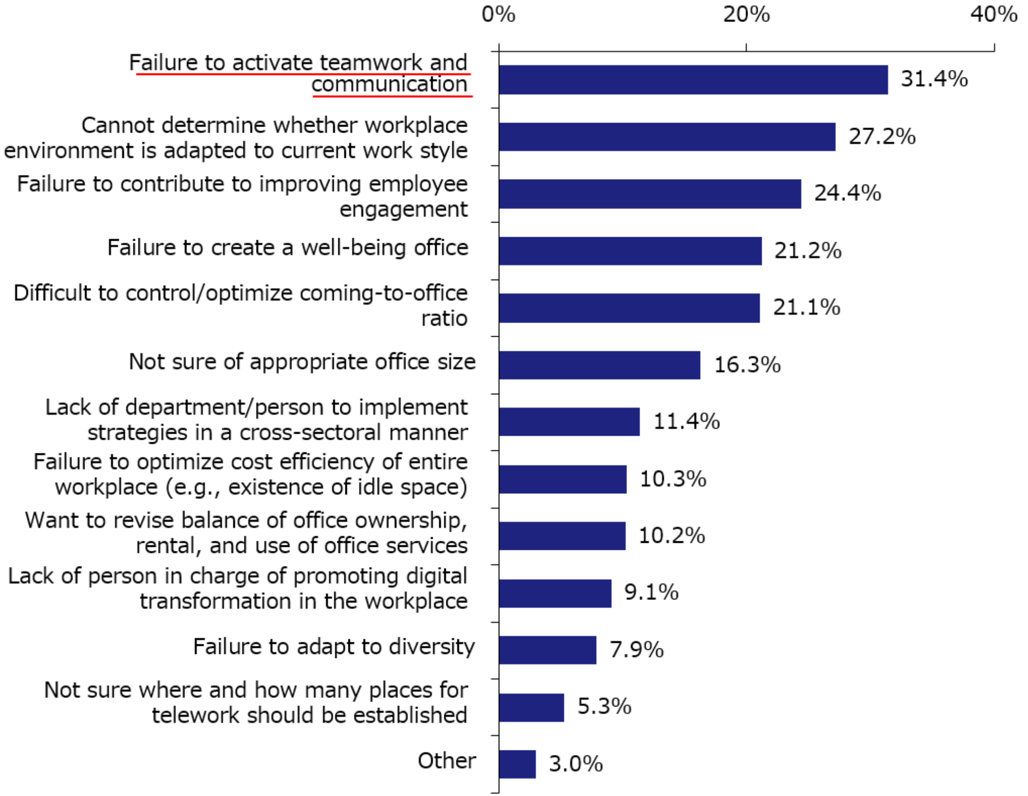
(All respondents)

Deep-seated concerns regarding “communication” remain key issue in workplace strategies

In terms of problems and issues related to workplace strategies, the top issue was “Failure to activate teamwork and communication” (31.4%). This suggests that communication issues—which have been pointed out since the early days of telework adoption—remain a deep-seated issue for companies.

This was followed by issues related to a failure to fully utilize the office as a space that supports work styles and organizational development, such as “Cannot determine whether workplace environment is adapted to current work style” (27.2%) and “Failure to contribute to improving employee engagement” (24.4%) (Figure 43).

Figure 43: Issues Related to Workplace Strategies



(Excludes companies that replied 'None in particular' (n=845)/ MA)

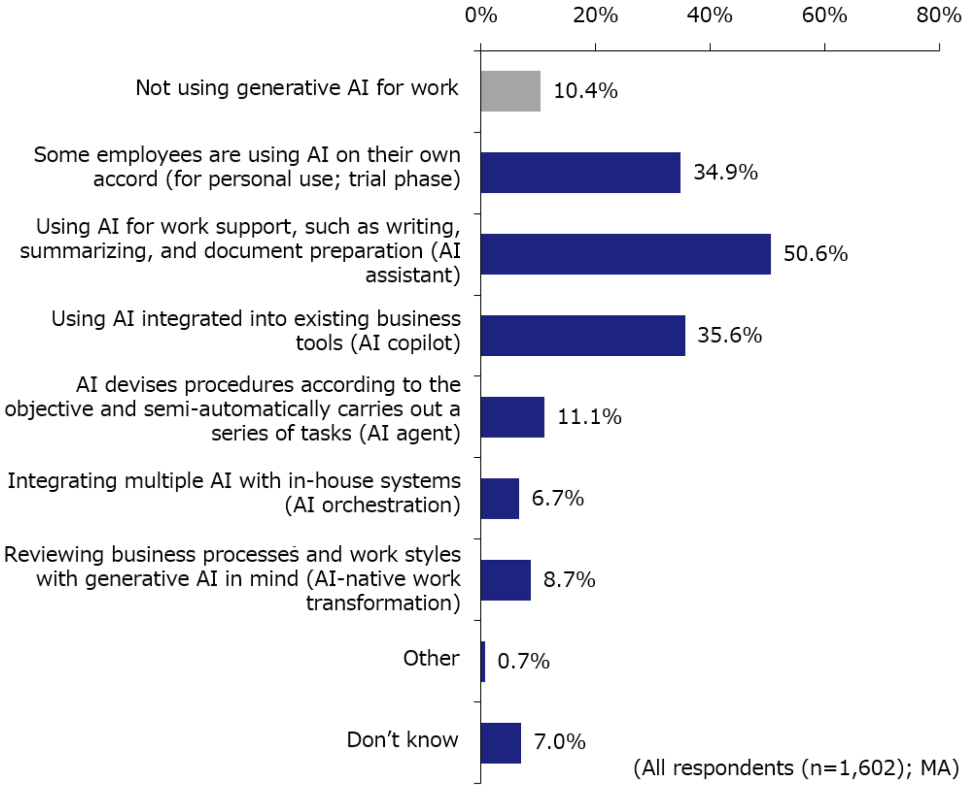
Many companies already using generative AI for work, primarily for “work support (AI assistant)”

When asked about the use of generative AI for work, only 10.4% of companies replied that they are “not using generative AI for work,” indicating that a large majority of companies already use generative AI in their work, although the extent of adoption varies (Figure 44).

In particular, the percentage of companies that said they are “using AI for work support, such as writing, summarizing, and document preparation (AI assistant)” reached 50.6%, accounting for a majority.

In addition, more advanced applications, such as “AI devises procedures according to the objective and semi-automatically carries out a series of tasks (AI agent)” (11.1%) and “Reviewing business processes and work styles with generative AI in mind (AI-native work transformation)” (8.7%), each accounted for about 10%.

Figure 44: Status of Generative AI Adoption



Approximately 20% use generative AI at a relatively advanced level

We classified the status of generative AI adoption shown in Figure 44 as "generative AI utilization levels," based on the most advanced use case from among the respondents' selected items (Figure 45).

Level 6: Selected "AI-native business transformation"

Level 5: Selected "AI orchestration" (other than the above)

Level 4: Selected "AI agent" (other than the above)

Level 3: Selected "AI copilot" (other than the above)

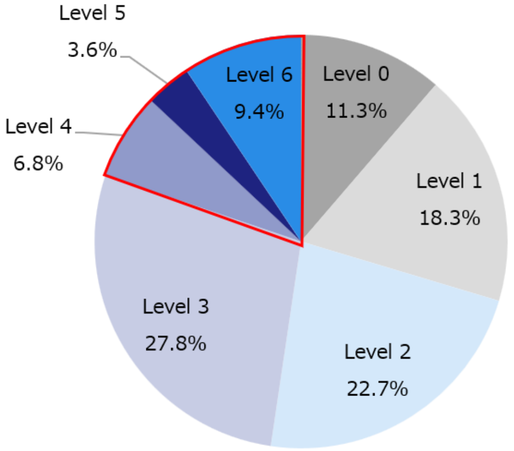
Level 2: Select "AI assistant" (other than the above)

Level 1: Selected "Personal use; trial phase" (other than the above)

Level 0: Selected "Not using"

Levels 2 and 3 account for about half . While many companies are at the stage of utilizing AI assistants or AI copilots, those at Level 4 or higher—indicating relatively advanced usage—account for about 20%.

Figure 45: Levels of Generative AI Adoption (*For comparison charts by attribute, see [Appendix 5] at the end of the web page (in Japanese only))



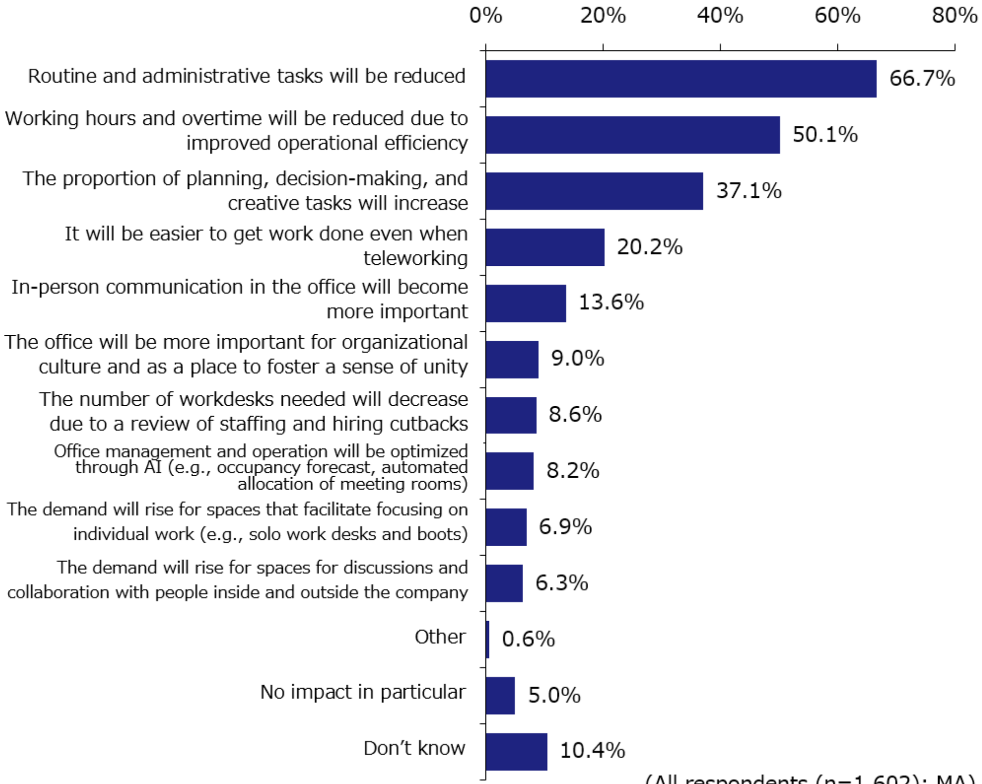
(Excludes 'Don't know' and 'Other' (n=1,483); reaggregated)

Many companies expect generative AI adoption to lead to reduced routine and administrative tasks and shorter working hours

When asked about the impact of the growing use of generative AI within companies on work styles and the office environment, the most common response was “Routine and administrative tasks will be reduced” (66.7%), followed by “Working hours and overtime will be reduced due to improved operational efficiency” (50.1%) and “The proportion of planning, decision-making, and creative tasks will increase” (37.1%) (Figure 46). This suggests that many companies expect the use of generative AI to streamline routine tasks, thereby reducing working hours and enabling a shift toward higher-value-added work.

On the other hand, fewer than 10% of companies anticipated a direct impact on the office environment, such as the number of work desks or the amount of space within the office. However, changes in work styles and job responsibilities—such as the reduction of routine tasks and the shift toward creative work, which were the top responses—are likely to have ripple effects on the number of desks needed in the future, as well as the design of work desk spaces and collaboration areas, and may transform the role of the office.

Figure 46: Impact of Generative AI on Work Styles and Office Environment



(All respondents (n=1,602); MA)

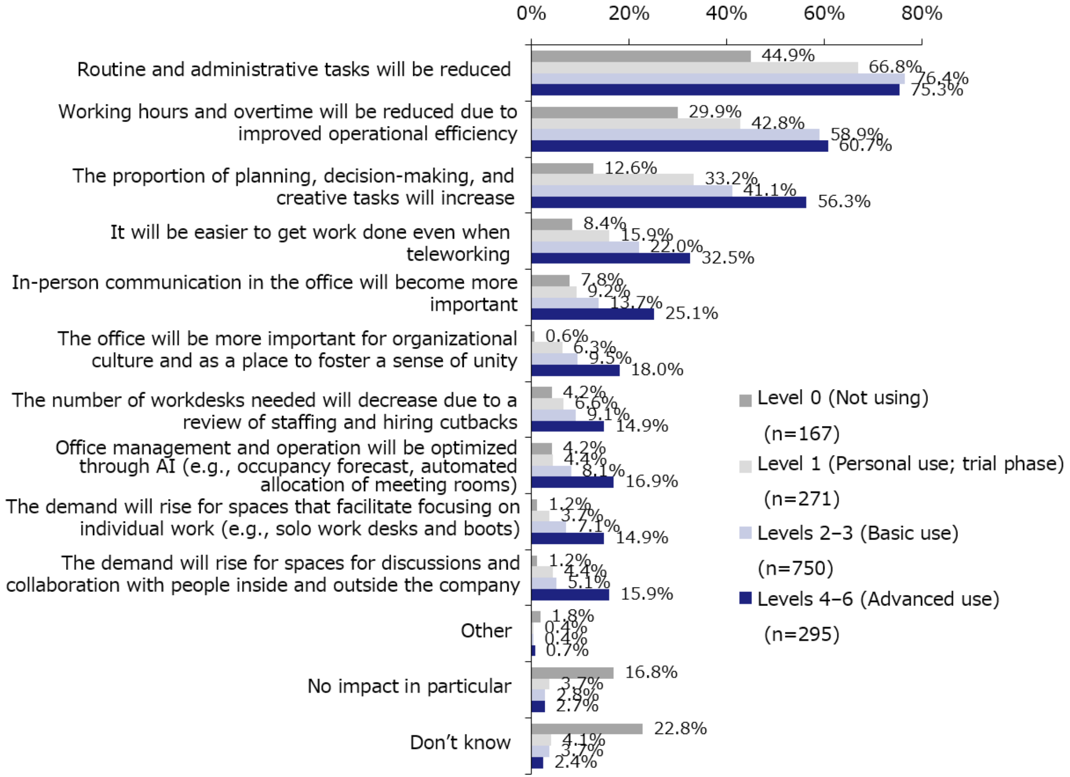
The higher the level of generative AI adoption, the more impact felt on work styles and the office

Figure 47 compares the results of Figure 46 by level of generative AI adoption (Figure 45).

For the top responses overall, which are “Routine and administrative tasks will be reduced” and “Working hours and overtime will be reduced due to improved operational efficiency,” the perceived impact varies significantly depending on whether the company has implemented generative AI or not. On the other hand, little difference was observed between basic use (Levels 2–3) and advanced use (Levels 4–6).

For other items, the results indicate that the higher the level of utilization, the more likely companies are to perceive the impact of generative AI. Therefore, as the use of generative AI becomes more widespread in the future, it is possible that an increasing number of companies will anticipate impacts from generative AI even in areas where response rates were low in Figure 46.

Figure 47: Impact of Generative AI on Work Styles and Office Environment by Level of Adoption



(Excludes 'Don't know' and 'Other'; MA; excerpt)

Regarding the use of generative AI for work (open-ended responses; excerpts and edited)

Regarding the use of generative AI for work, we asked respondents to freely describe their company's unique approaches, what they would like to try in the future, and any current challenges or concerns they have. As the level of generative AI adoption increased, differences were observed in the specific work where it was used and the nature of the challenges faced. However, concerns regarding data leaks and security were consistently cited regardless of utilization level, making them one of the primary concerns associated with the use of generative AI. The following are excerpts from the responses.

Levels 0–1 (Not using / Personal use; trial phase): Barriers to adoption and a vague sense of anxiety toward generative AI were cited. On the other hand, some respondents expressed optimism about the benefits of using generative AI.

- There is no one familiar with generative AI, so we are not sure how to use it or how it can be applied.
- Employees are reluctant to use it actively.
- We are avoiding active adoption because there is a high risk of problems arising from the output of incorrect information.
- Concerns about information leaks
- We are concerned that overreliance on AI could have negative effects, such as a decline in human imagination and creativity, a decline in writing skills, and a decline in the ability to adapt and solve problems flexibly.
- It is likely to reduce the workload involved in document preparation.
- We want to use AI functions to automate visual inspections of products.

Level 2 (AI assistant): Primarily used to streamline individual work tasks. Respondents recognize challenges related to employee training and more advanced applications.

- We find it useful for document creation and research. Data leaks remain a concern.
- While some experts are already working on improving operational efficiency, we'd like to raise the level of basic knowledge and tackle this as a cross-functional effort.
- Since employees have varying levels of experience in creating prompts to elicit appropriate responses, we'd like to promote information sharing.
- Although on a small scale, we'd like to try implementing a local LLM.

Level 3 (AI copilot): There are cases that go beyond the personal level, such as customization for the company's needs and system integration. Challenges cited included "internal rules" and the "selection of AI."

- FAQs reflecting the company's own criteria
- We want to improve operational efficiency by integrating our various systems.
- It would be ideal to establish a system where all employees can access information they absolutely need to know, such as internal rules established and announced by the control dept.
- How can we verify the coherency and accuracy of materials created using generative AI?
- Selecting AI suitable for each specific task • Measures to address copyright and data leaks

Levels 4–5 (AI agent/AI orchestration): The scope of AI application expands to more core business operations. The challenges cited are based on the premise of widespread AI adoption within the company.

- We want to further deepen AI orchestration to establish a foundation for business planning.
- We are using it for project management.
- Preventing reliance on individual expertise by transferring know-how to AI
- Expanding use cases for generative AI and evaluating its impact on work efficiency
- It is necessary to hold workshops on information leakage prevention and security, and to establish guidelines for introducing new AI tools.
- It is difficult to keep up with new AI technologies and determine the optimal ways to utilize AI.

Level 6 (AI-native business transformation): The use of AI is a prerequisite for work.

- Using AI is mandatory for all employees.
- AI is now used for virtually all contract reviews, meeting minutes, and document preparation. We are also considering having AI handle customer service and collecting marketing data.
- Data leaks. • Improves the onboarding process.