Metropolitan Areas Office Demand Survey Spring 2026 <Summary Report>

July 30, 2026

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

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. We have released a report summarizing the results of our 20th 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)" was 14.4%, while "Downsizing (actual + potential)" was 6.2%. The DI has remained largely unchanged at 8.2 since the Spring 2024 survey (Figure 1).
- In terms of future office size (up to 2–3 years ahead), 17.4% of the companies "want to expand," outweighing those who "want to downsize" (4.4%) (Figure 2).
- 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 (i.e., since the Spring 2023 survey), the average coming-to-office ratio has remained around 70% (Figure 3).
- 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 (Figure 4-1).
- 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" (Figure 4-2).
- In terms of 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. (Figure 5-1). Regarding the impact of generative AI, companies expect it will improve work efficiency and enable a shift toward higher-value work (Figure 5-2).
- Although the "quantitative expansion" of office space has remained flat and appears to be easing, the market seems to be entering a phase of qualitative change, with companies exploring ways to optimize and enhance office functionality.

Survey Overview

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

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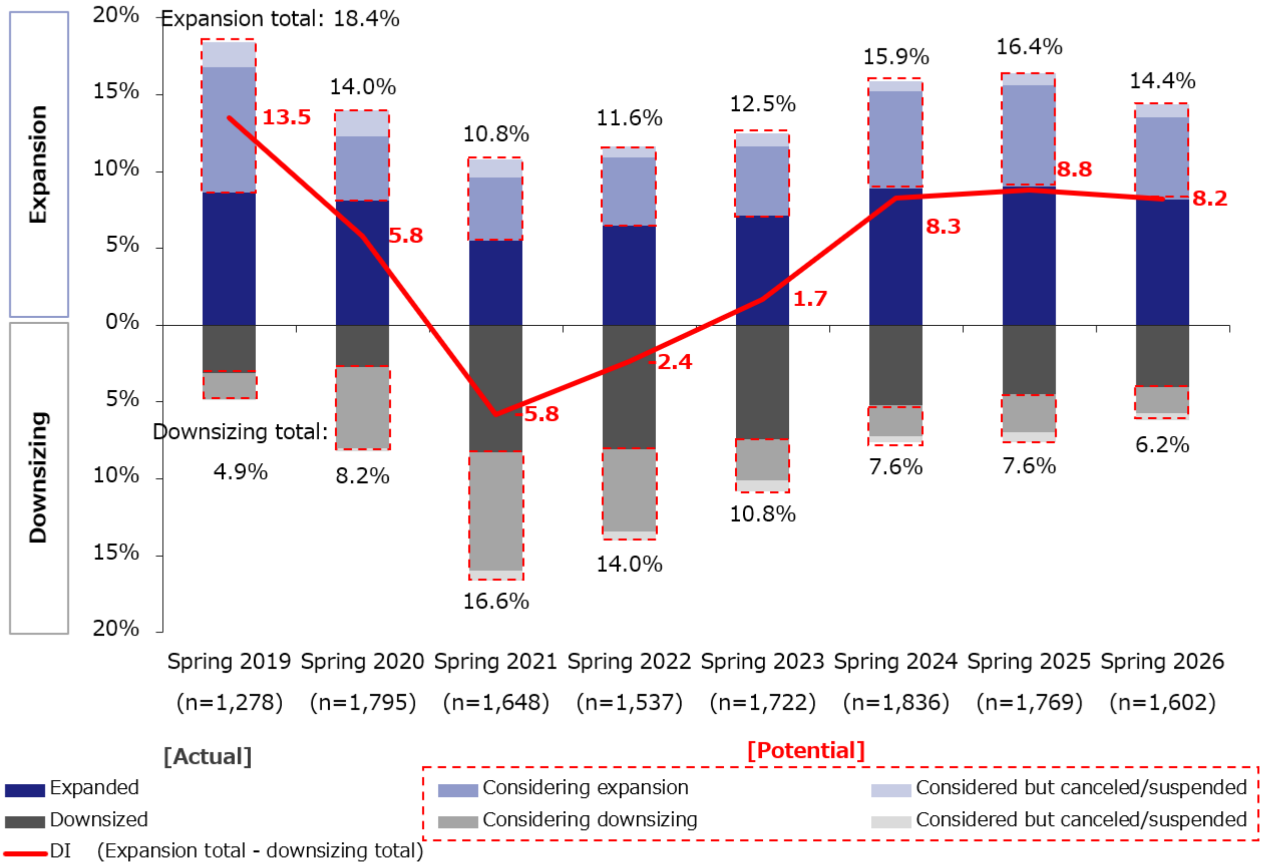
topic 1

In terms of office size in the past year, "Expansion (actual + potential)" was 14.4%, while "Downsizing (actual + potential)" was 6.2%. The DI was 8.2 (Figure 1).

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 relatively unchanged since the Spring 2024 survey, and the expansionary trend is ongoing.

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



(All respondents)

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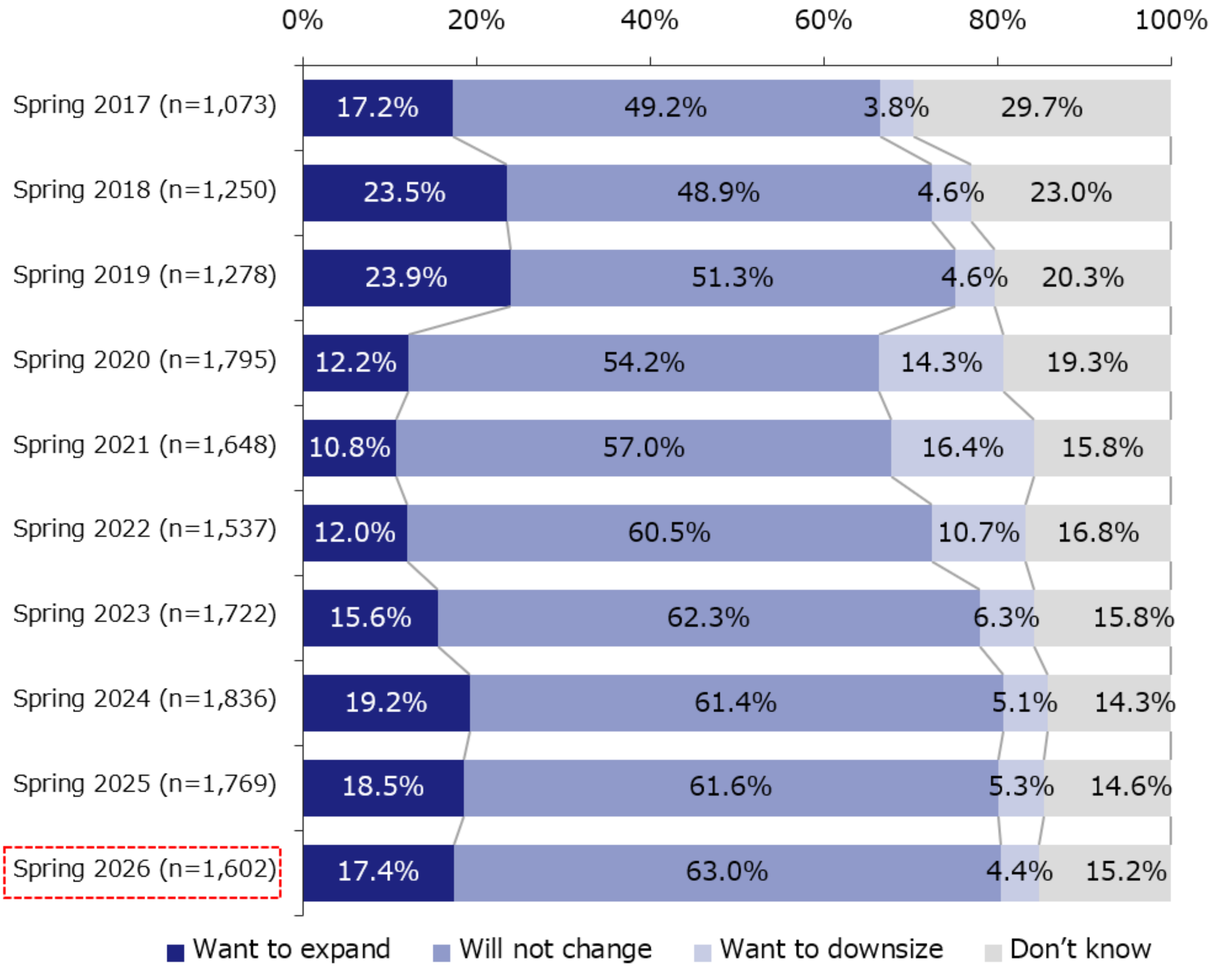
topic 2

In terms of future office size (up to 2–3 years ahead), “Want to expand” (17.4%) continued to outweigh “Want to downsize” (4.4%) (Figure 2). 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 2: Future Change in Office Size



(All respondents)

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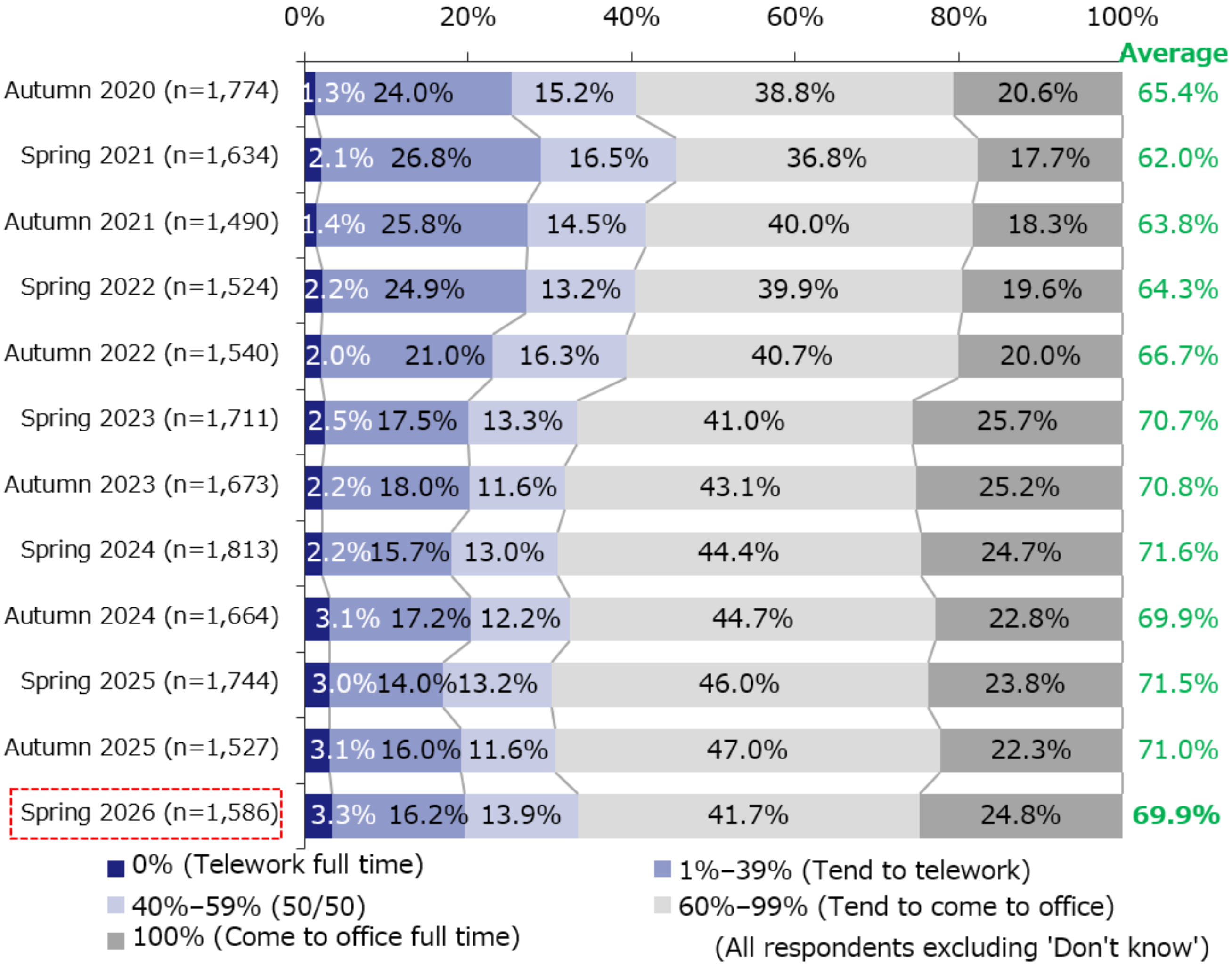
topic 3

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% (Figure 3). 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 3: Actual Coming-to-Office Ratio (Comparison over Time)



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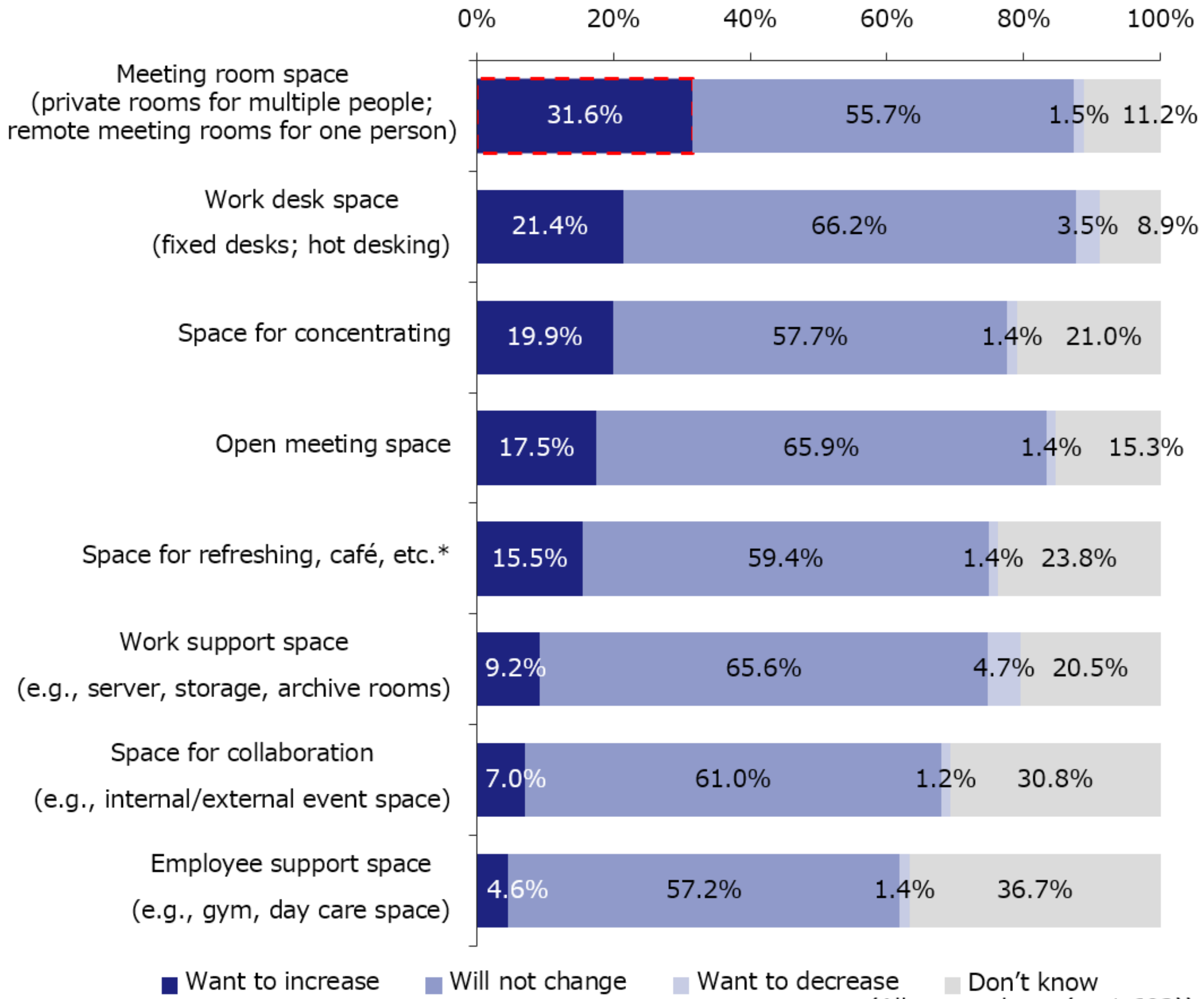
topic 4

In terms of future intentions for each type of space within the office, the percentage of companies that "want to reduce" the spaces remained at 5.0% or lower for all spaces, less than the percentage of companies that "want to increase" (Figure 4-1).

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.

Figure 4-1: 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

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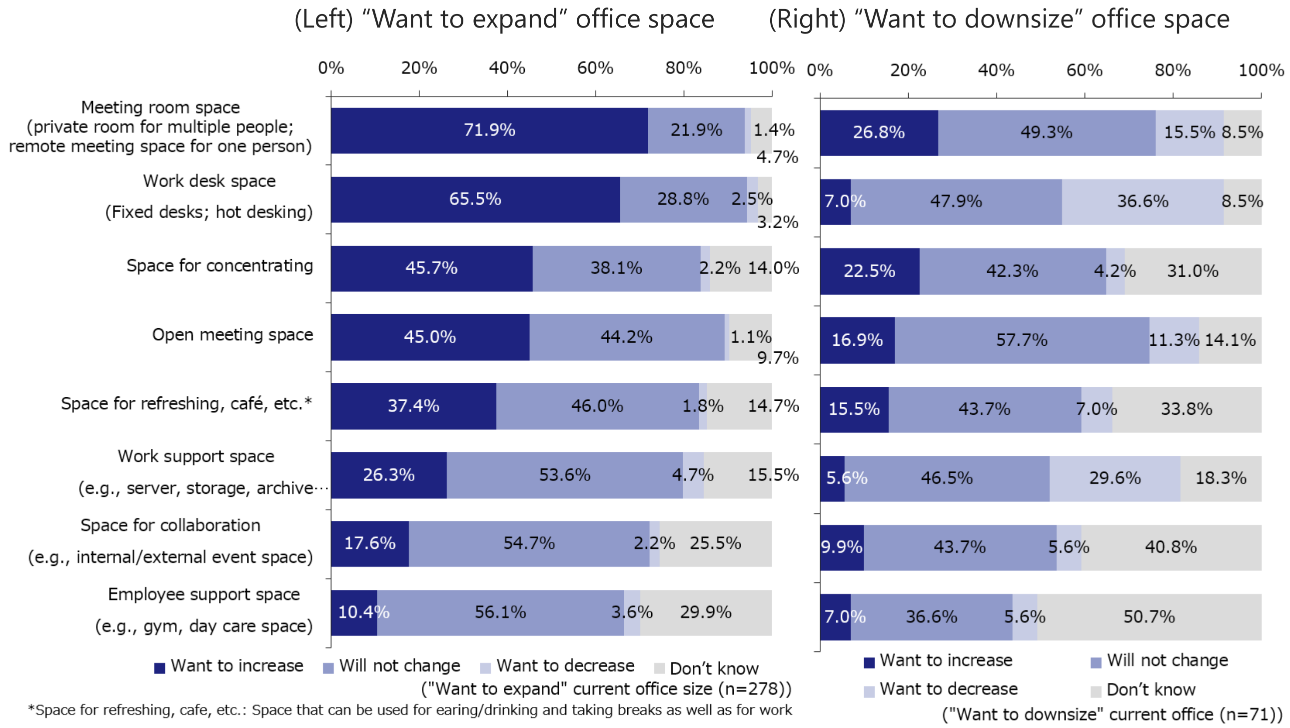
When analyzing these results by future changes in office size, it becomes clear that companies that “want to expand” their office space are more likely to “want to increase” the size of each type of space (Figure 4-2 (left)).

On the other hand, 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 4-2 (right)). Even companies looking to downsize may still be striving to optimize specific spaces while ensuring they have all the functions they need.

Figure 4-2: Future Changes in Each Space by Future Change in Office Size

An excerpt of the groups that “want to expand” or “want to downsize” their office space



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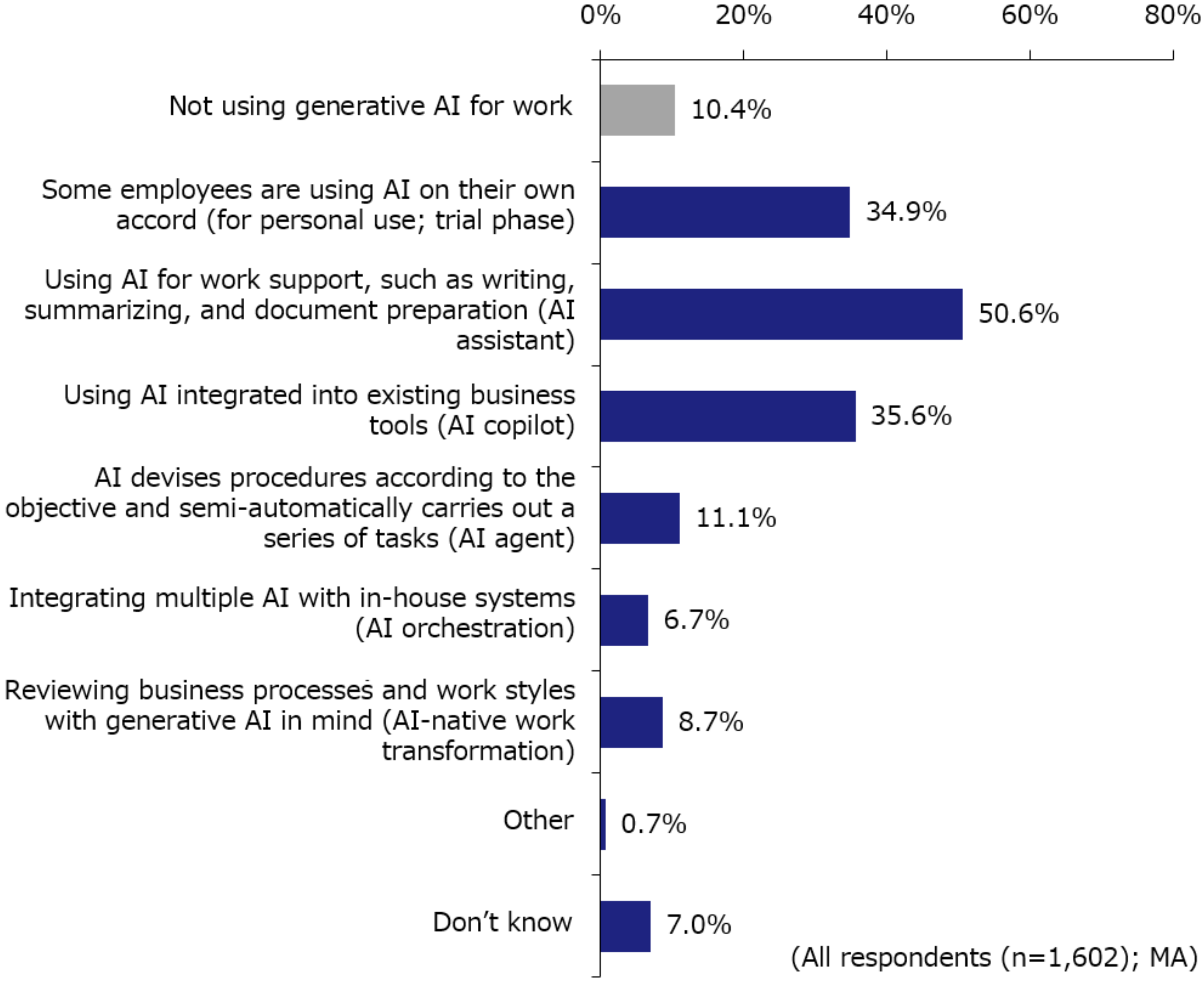
topic 5

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 5-1).

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 5-1: Status of Generative AI Adoption



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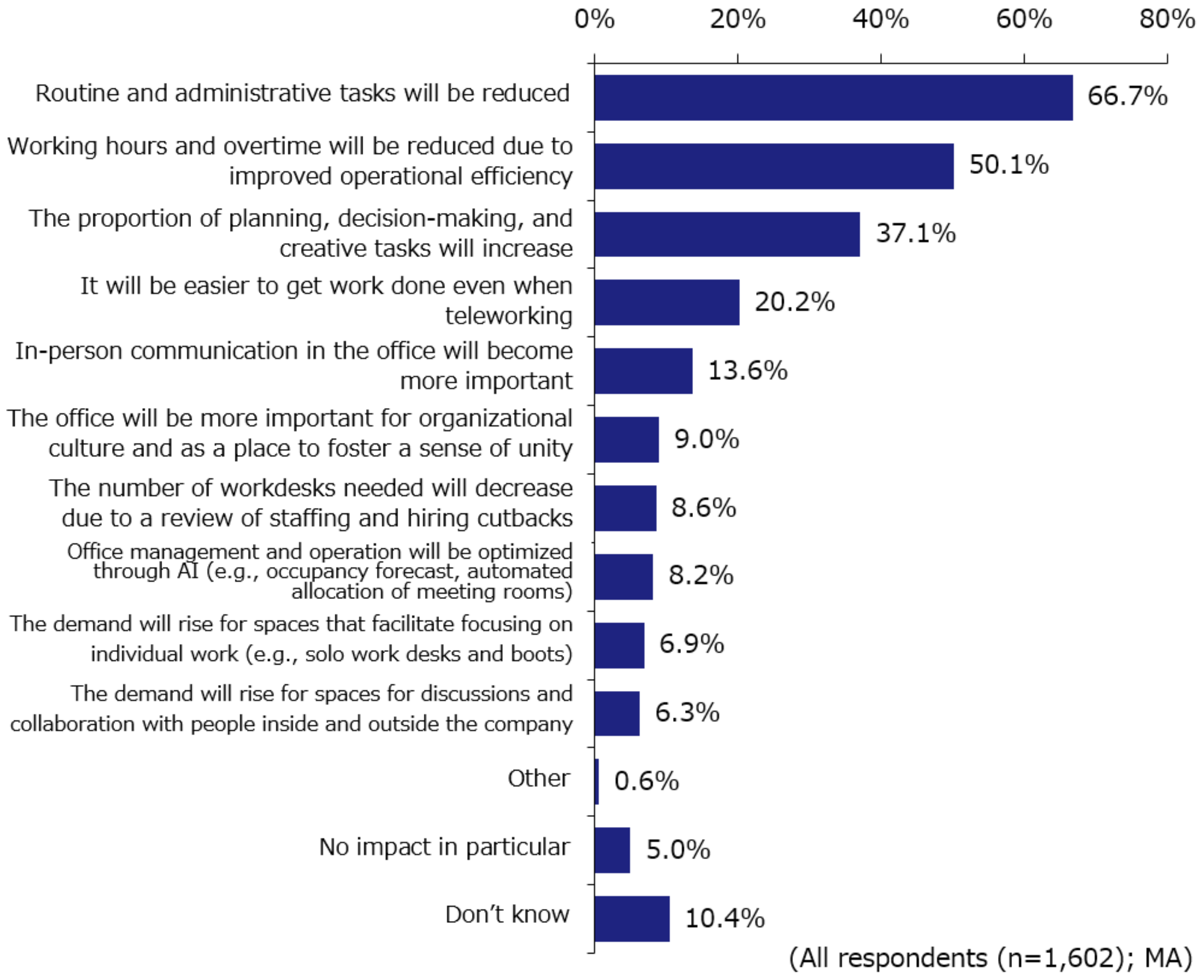
When asked about the impact of the growing use of generative AI within companies on work styles and the office environment, the most common response was "Routine and administrative tasks will be reduced" (66.7%), followed by "Working hours and overtime will be reduced due to improved operational efficiency" (50.1%) and "The proportion of planning, decision-making, and creative tasks will increase" (37.1%) (Figure 5-2). 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 5-2: Impact of Generative AI on Work Styles and Office Environment



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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