Metropolitan Areas Office Demand Survey Spring 2025 <Summary Report>

July 30, 2025

The continued search for a workplace strategy that suits the new work style that is taking hold

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. We have released a report summarizing the results of the 18th survey. This **Summary Report** is an excerpt from the full report.

Main Findings

- Change in office size over the past year: The sum of "Expansion (actual + potential)" was 16.4%, while the percentage for "Downsized (actual + potential)" was 7.6%. The DI was 8.8, a slight increase from the Spring 2024 survey (Figure 1).
- Future office size (up to 2–3 years ahead): "Want to expand" (18.5%) outweighed "Want to downsize" (5.3%) (Figure 2).
- Coming-to-office ratio: 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% (Figure 3).
- Major focuses when implementing office strategies: As in the Spring 2024 survey, when compared to the Spring 2019 survey, the percentage increased in all items, indicating a continued emphasis on diverse elements in the office. "Improvement in work engagement" has become even more important, increasing by another 6.0 points from the Spring 2024 survey (Figure 4).
- Issues felt in the main office: The top issue was "Difficulty in controlling the temperature to a comfortable level" (38.1%). This was followed by "Lack of meeting rooms" (28.7%) and "Lack of private rooms for remote meetings" (19.7%) (Figure 5-1).
- Future changes in each space: The space that companies want to increase the most was "Meeting room spaces (private rooms for multiple people, remote meeting rooms for one person)" (35.0%) (Figure 5-2).
- Interest in using the nine types of flexible offices: For "Shared meeting room (small, short hours)," the sum of "Already using" and "Interested" (45.9%) gained the largest percentage (Figure 6).
- Issues in workplace strategies: Top issues concerned making the workplace more than a workspace, such as "Failure to activate teamwork and communication" (30.9%), "Failure to contribute to improving employee engagement" (29.7%), and "Failure to create a well-being office" (25.8%) (Figure 7).

Survey Overview

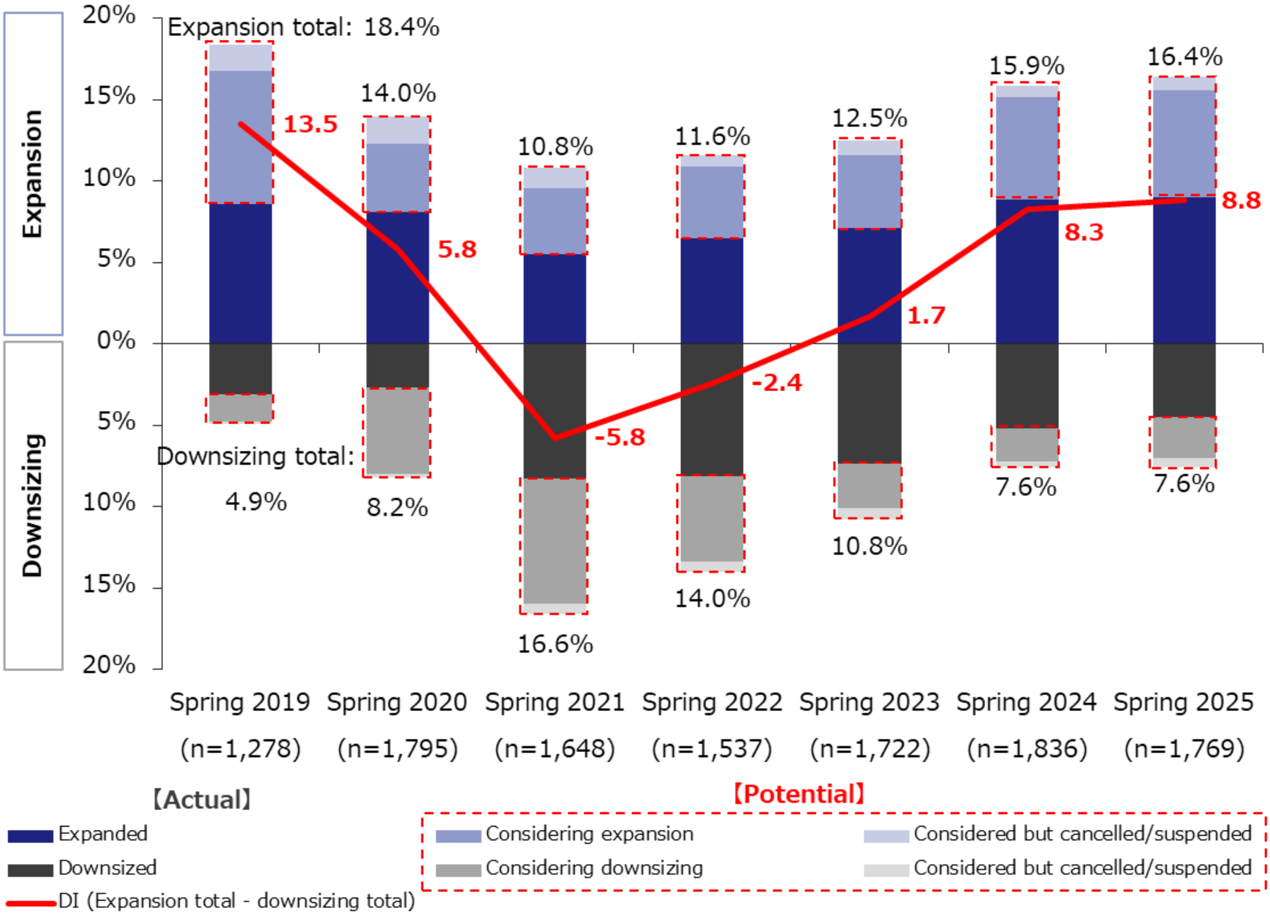
Survey period:	June 3–15, 2025
Target respondents:	58,095 companies in total that include the following: ・Tenants of office buildings managed by the Xymax Group ・Companies subscribing to ZXY, a satellite office service for corporate customers ・Client companies of XYMAX INFONISTA Corporation
Number of valid responses:	1,769 (Aggregated in office units; therefore, answers from different offices of the same company are treated as separate answers.)
Geographical coverage:	Nationwide (Tokyo, Osaka, Aichi, Fukuoka, Kanagawa, Saitama and Chiba prefectures)
Survey method:	Email

topic 1

In terms of changes in office size over the past year, "Expansion (actual + potential)" was 16.4%, while "Downsizing (actual + potential)" was 7.6% (Figure 1). The DI was 8.8, a slight increase from the Spring 2024 survey.

We can see that the Spring 2021 survey marked a shift from a downsizing trend to an expansionary trend and that the expansionary trend has been stabilizing recently.

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

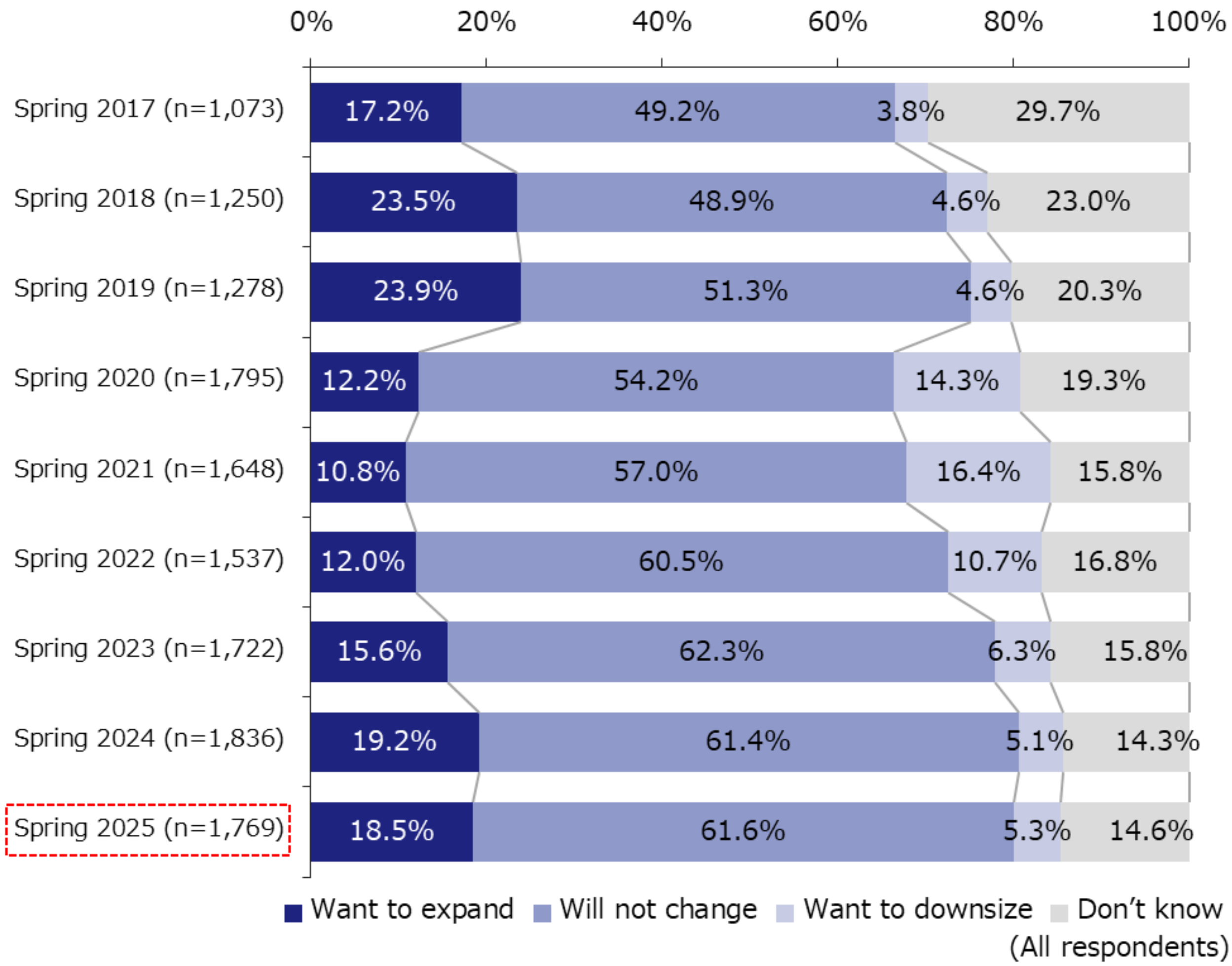


(All respondents)

topic 2

In terms of future office size (up to 2–3 years ahead), 18.5% of the companies said they "want to expand," more than those who said they "want to downsize" (5.3%) (Figure 2). Compared over time, the percentage of companies that "want to expand" had been increasing since bottoming out in the Spring 2021 survey but has stabilized at a level similar to that in the Spring 2024 survey.

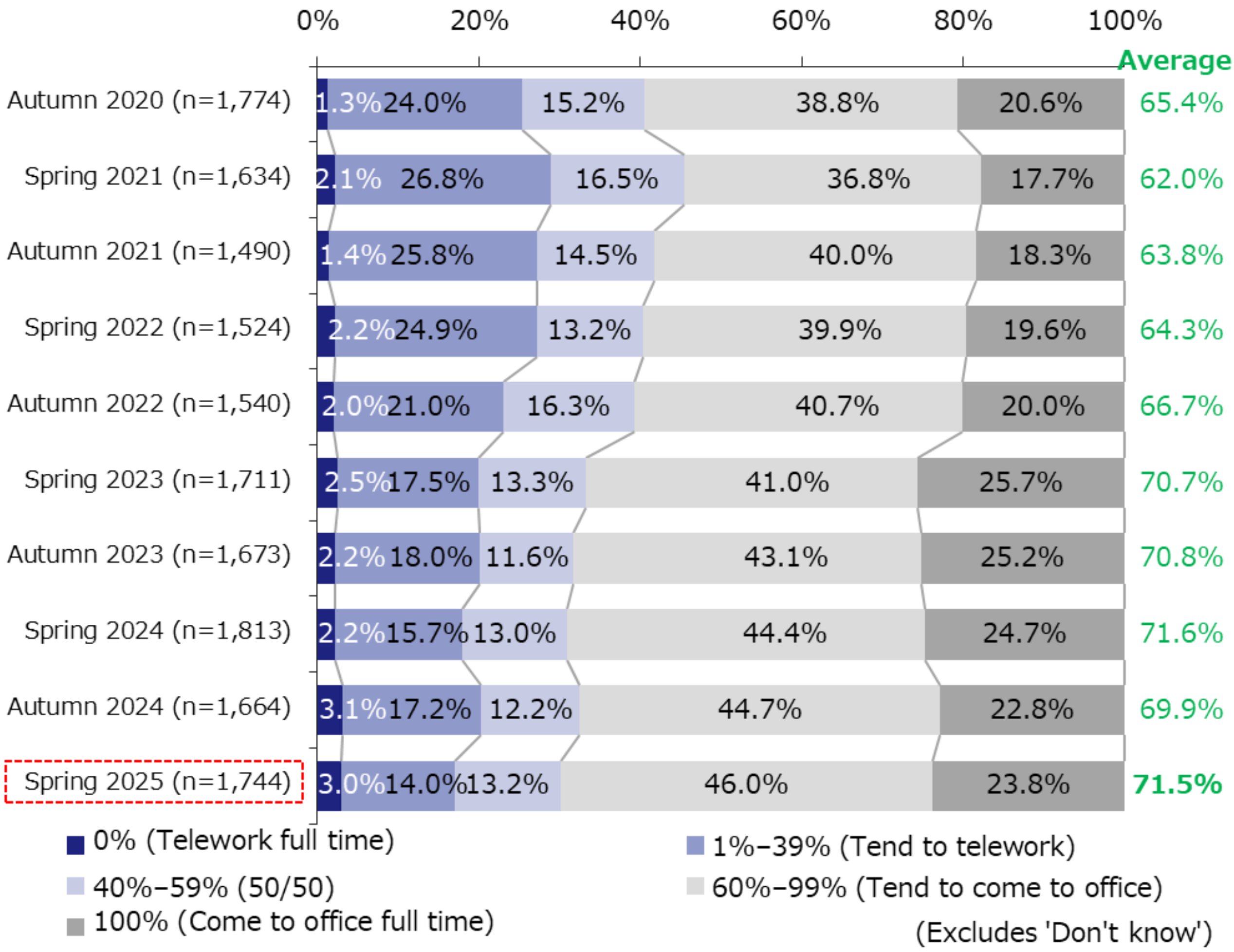
Figure 2: Future Change in Office Size



topic 3

The coming-to-office ratio has remained generally flat since COVID-19's transition to a Class 5 infectious disease (since the Spring 2023 survey), with the average coming-to-office ratio remaining around 70% (Figure 3). However, there is a slight change in the breakdown, with "60%–99% (Tend to come to office)" increasing by 5.0 points in total from the Spring 2023 survey to this survey, and "1%–39% (Tend to telework)" decreasing by 3.5 points in total.

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

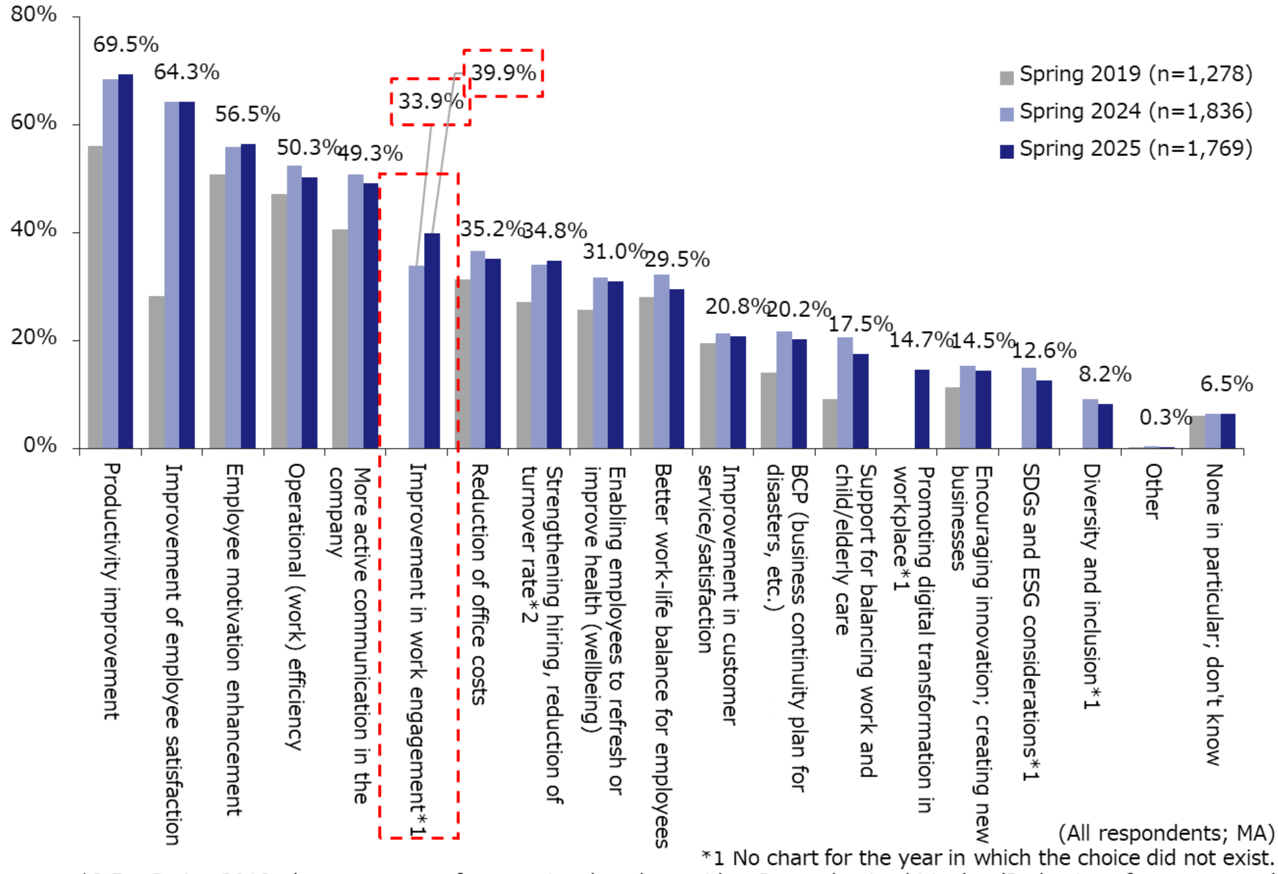


topic 4

When comparing companies' major focuses when implementing office strategies to those in the Spring 2019 survey, which was conducted before the outbreak of the pandemic, the percentage increased in all items, as in the Spring 2024 survey (Figure 4). It can be said that the emphasis on diverse elements in the office following the pandemic has continued.

"Improvement in work engagement" has become even more important, increasing by another 6.0 points from the Spring 2024 survey.

Figure 4: Major Focuses When Implementing Office Strategies



(All respondents; MA)

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

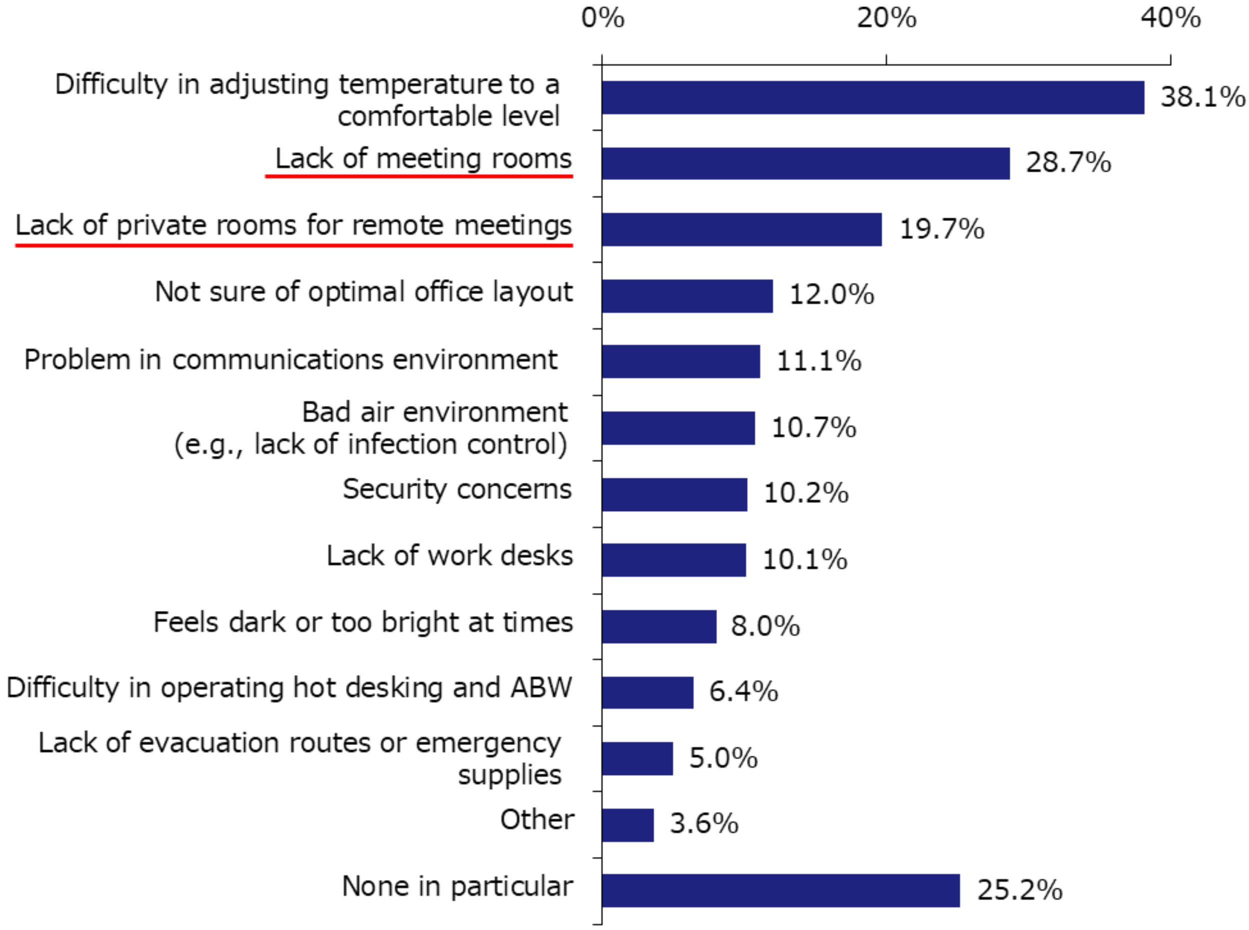
*2 For Spring 2019, the percentage of companies that chose either Strengthening hiring' or 'Reduction of turnover rate'

topic 5

The top issue felt by companies concerning their current main office was "Difficulty in adjusting temperature to a comfortable level" (38.1%) (Figure 5-1). This was followed by "Lack of meeting rooms" (28.7%) and "Lack of private rooms for remote meetings" (19.7%), indicating a lack of meeting space as hybrid work takes hold.

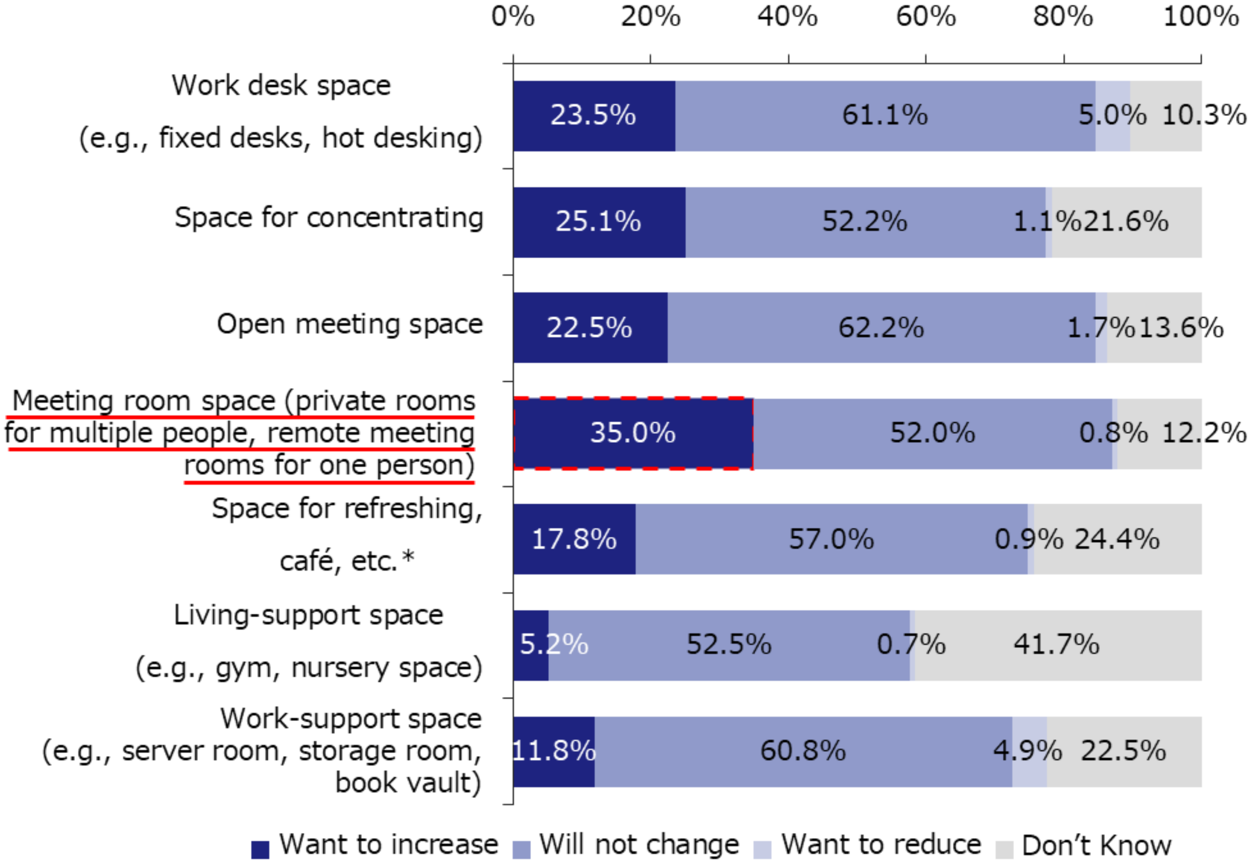
When asked what they would like to do about each space in the office in the future, 35.0% of companies said they "want to increase" the number of meeting room spaces (private rooms for multiple people, remote meeting rooms for one person), indicating the intensity of the issue of the lack of meeting rooms (Figure 5-2).

Figure 5-1: Issues Felt in Current Main Office



(All respondents (n=1,769); MA)

Figure 5-2: Future Changes in Each Space



(All respondents (n=1,769))
*Space for refreshing, cafe, etc.: Space for eating, drinking, or resting that can also be used for work.

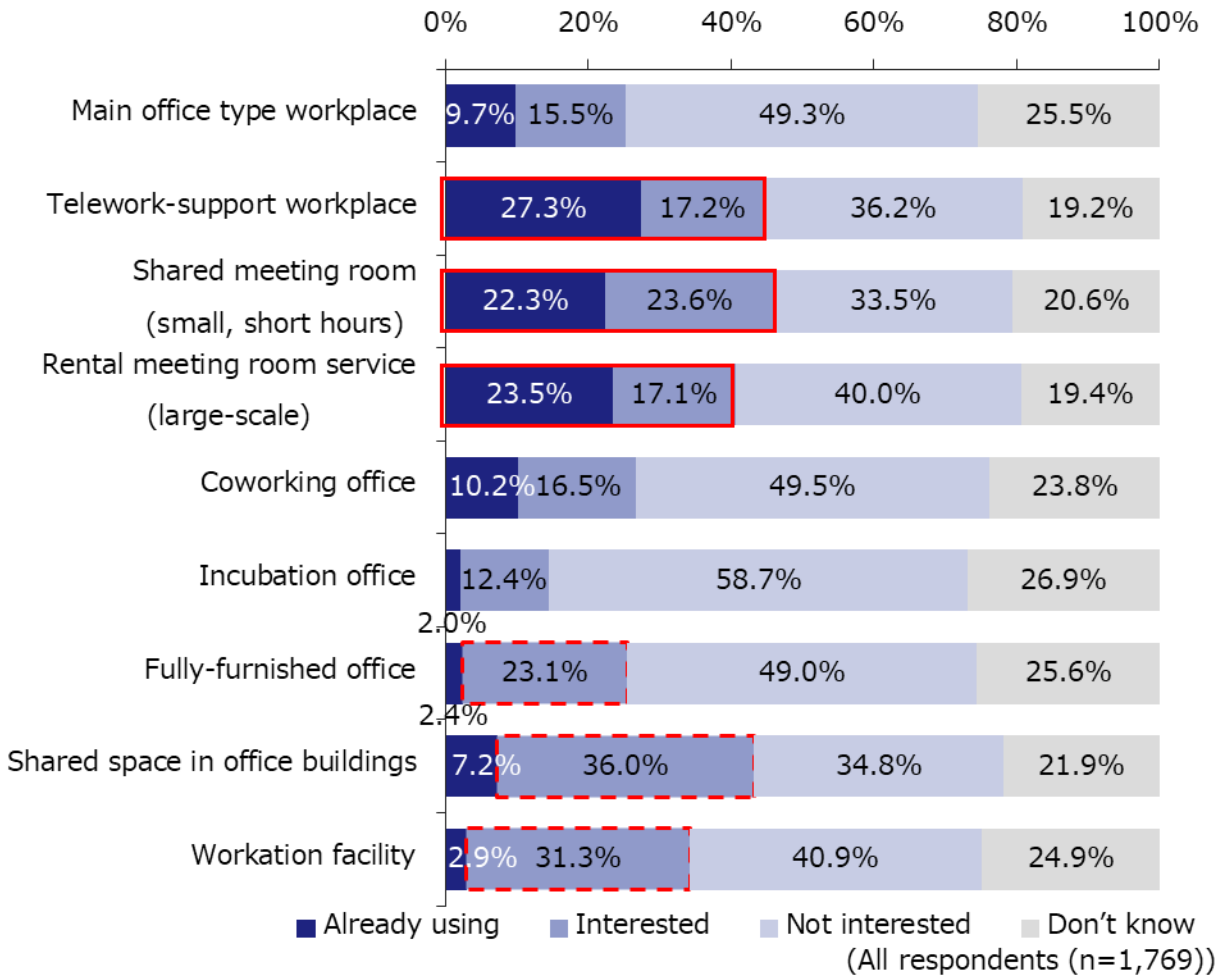
topic 6

We also listed nine types of flexible offices* and asked respondents to indicate their level of interest in each type as their place of work. The results indicate that "Telework-support workplace," "Shared meeting room (small, short hours)," and "Rental meeting room service (large-scale)" are more prevalent than other services, with more than 20% of respondents saying they were "already using" each of the services (Figure 6). The highest sum of "Already using" and "Interested" was for "Shared meeting room (small, short hours)" (45.9% in total).

*See the Detailed Report for the description of each type.

"Fully furnished office," "Shared space in office buildings," and "Workation facility" had low percentages of companies that are "already using" them but had a relatively high percentage of companies that were "Interested."

Figure 6: Level of Interest in Using the Nine Types of Flexible Offices

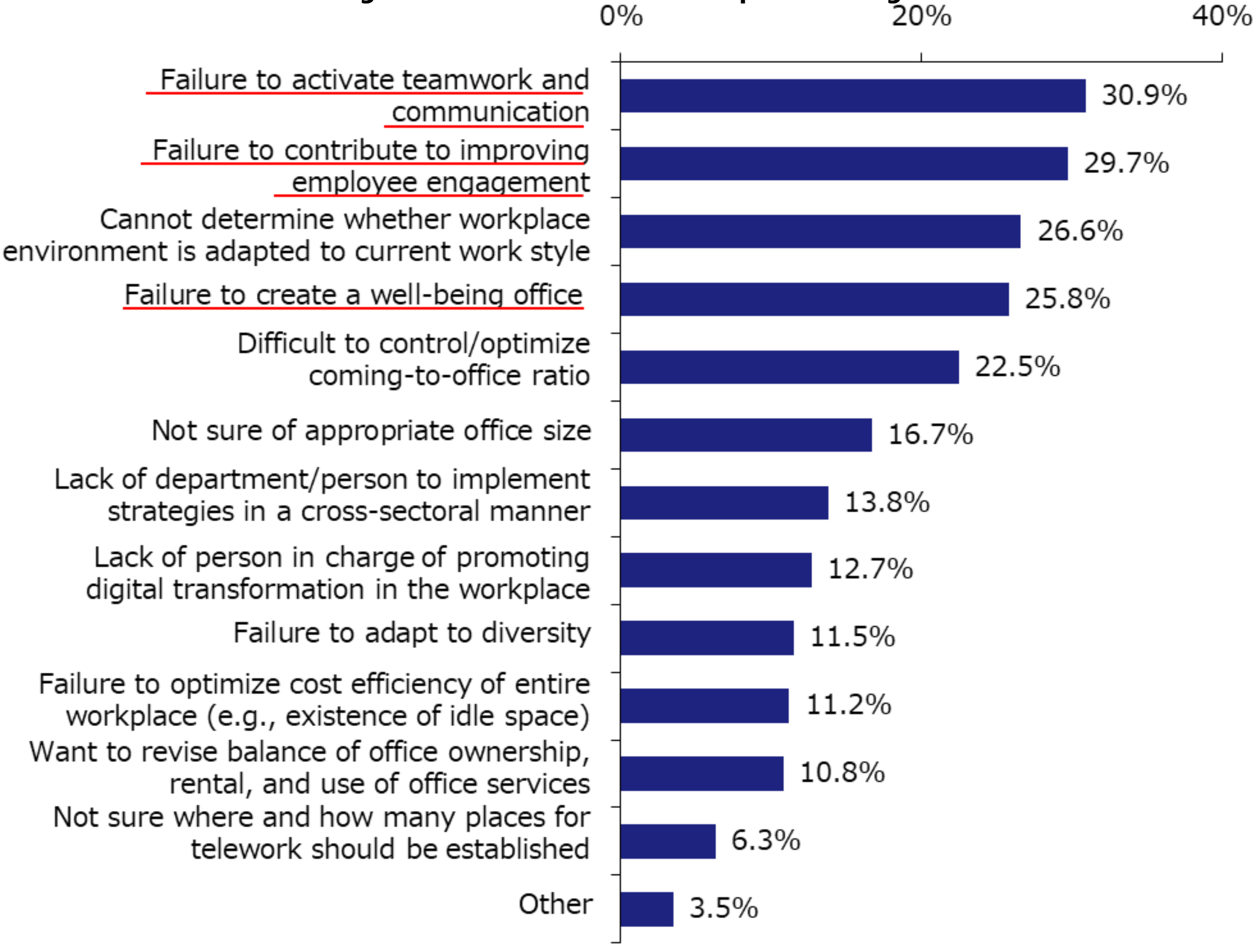


topic 7

In terms of problems and issues related to workplace strategies, the top issues were related to making the workplace more than a workspace, such as “Failure to activate teamwork and communication” (30.9%), “Failure to contribute to improving employee engagement” (29.7%), and “Failure to create a well-being office” (25.8%) (Figure 7). As the elements required of the office diversify (Figure 4), we can see that companies are struggling to build workplace strategies.

The results also indicate that a certain number of companies cite responding to changes in work styles after the COVID pandemic as an issue, such as “Cannot determine whether workplace environment is adapted to current work style” (26.6%), “Difficult to control/optimize coming-to-office ratio” (22.5%), and “Not sure of appropriate office size” (16.7%).

Figure 7: Issues Related to Workplace Strategies



(Excluding companies that replied "None in particular" (n=1,033)/ MA)

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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