Decoding the Direction of Workplace Strategies for Companies Adapting to Change

Five types of companies through cluster analysis

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Xymax Research Institute

Introduction

In recent years, while diverse work styles such as hybrid work, activity-based working (ABW; a way of working that allows you to freely choose the place and time to work according to the content and purpose of work), and the use of satellite offices have been advancing, there are also signs of a return to a work style that assumes coming to the office. Under such circumstances, companies' workplace strategies are becoming less uniform, and differences in direction are becoming more pronounced among companies depending on management policies, business characteristics, and human resources strategies.

To quantitatively understand this diversity, we conducted a cluster analysis*1 based on the results of a corporate survey*2 conducted in June 2025, and categorized companies into five types based on differences in workplace strategies.

*1 Cluster analysis method (see "Cluster Analysis Overview" at the end of the report for details): Hierarchical clustering using Gower's distance and Ward's method.
The following variables were used for clustering:
・Actual coming-to-office ratios
・Variables related to availability of telework environment: Availability of a work-from-home policy, availability of satellite offices
・Variables related to main office strategies: Major focuses when implementing office strategies, change in office size over the past year, actual layout in the office
・Implementation of work style initiatives

*2 *Metropolitan Areas Office Demand Survey Spring 2025 <Detailed Report>* released on July 30, 2025
https://www.xymax.co.jp/english/assets/pdf/news_research/20250730_Detailed.pdf

The purpose of this report is to clarify the characteristics of each of the five company types that were statistically classified. Chapter 1 provides a summary of the characteristics of each company type for easy reference. Chapter 2 examines response tendencies for survey items related to work style and workplace realities that were used for clustering, clarifying the characteristics of each type. Chapter 3 compares the issues and future directions of the different company types, presenting the results as potential futures for companies. We hope this report serves as a reference material for considering future workplace measures.

Five Directions of Workplace Strategies

Workplace strategies are not uniform, and companies can be categorized into five types based on their direction. Figure 1 shows the percentage of companies in each type.

①**Workplace transformers** (8%): This type is actively expanding options for work locations and hours to enable flexible work styles. These companies promote the development and utilization of diverse workplaces, while also placing importance on work styles in the main office. They are aiming for advanced optimization of hybrid work.

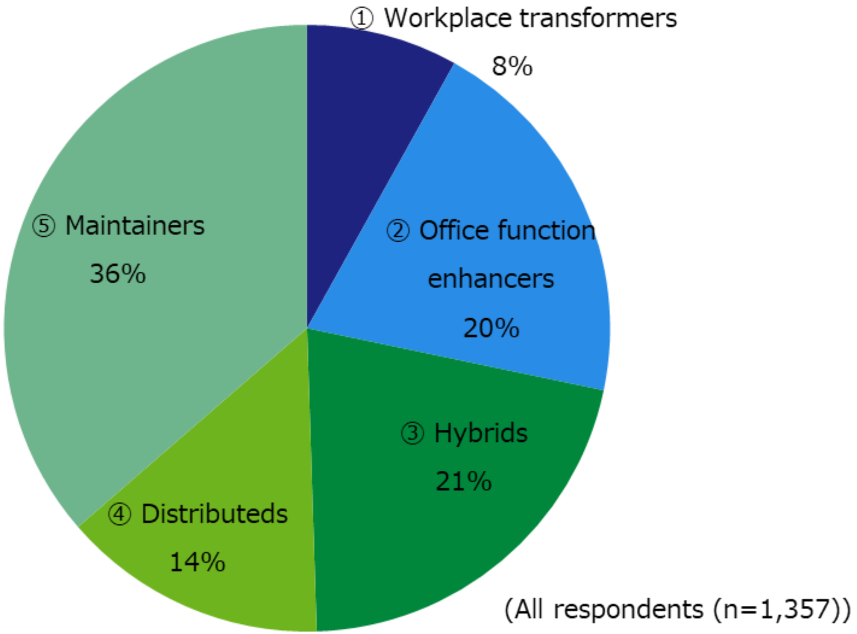
②**Office function enhancers** (20%): With the premise of making the office the primary workplace, this type is strongly inclined towards creating a human-centered, high-function, and sustainable office. While prioritizing a work style centered around the main office, these companies are also actively working on establishing telework environments, such as a work-from-home policy and satellite offices.

③**Office-Home hybrids (“Hybrids”)** (21%): This type adopts a basic policy of hybrid work, combining coming to the office and working from home, and is reviewing offices and systems to establish this model. However, a cautious approach is still being taken.

④**Distributed workplace-oriented (“Distributeds”)** (14%): While this type has a low awareness of investing in the main office, it actively utilizes satellite offices and flexible office services in the search of a distributed workplace model.

⑤**Status quo maintainers (“Maintainers”)** (36%): This type has relatively little interest in office or work style initiatives and maintains the traditional approach of coming to the office. Coming to the office full time is the mainstream. There is a stronger tendency to maintain the status quo than to introduce new work styles.

Figure 1: Percentage of the Five Company Types



<Reference> Main characteristics of the five company types

High ← Focus/implementation of workplace initiatives → Low

	① Workplace transformers (n=114)	② Office function enhancers (n=271)	③ Hybrids (n=289)	④ Distributeds (n=196)	⑤ Maintainers (n=487)
Coming-to-office ratio	**Low** (39% on average)	**High** (73% on average)	**Moderate** (64% on average)	**Somewhat low** (59% on average)	**High** (79% on average)
Availability of telework environment	**Diverse locations** (Home 92%, satellite offices 77%)	**Diverse locations** (Home 77%, satellite offices 61%)	**Mostly WFH** (Home 91%, satellite offices 13%)	**Mostly satellite offices** (Home 6%, satellite offices 95%)	**Reluctant** (Neither is available 94%)
Focus on office strategies (Particular focus)	**High** (Experience, performance, work-life balance)	**Very high** (Experience, performance, well-being, organizational adaptability improvement)	**Moderate** (Productivity improvement, employee satisfaction, enhanced communication)	**Low** (Productivity improvement)	**Somewhat low** (Productivity improvement)
Office layout	**Hot desking, ABW**	**Fixed desks and hot desking, ABW**	Hot desking in some areas, **designed to address hybrid work**	Hot desking in some areas, **minimum design**	Mainly fixed desks, **maintaining traditional office**
Implementation of work style initiatives (Particular focus)	**Extremely high** (Work style not bound by time or place, workplace location allowances)	**High** (HR development, business DX, ABW office)	**Moderate; somewhat high in some areas** (Flextime program, workplace location allowance, basic ICT environment)	**Low; somewhat high in some areas** (Use of generative AI, chat tools, workation systems)	**Low**

1. Summary: The five company types

①Workplace Transformers

#Promotes flexible work styles not bound by place or time #Improves human capital #Enhances both in-person and remote communication

Basic attributes: Predominantly large-size, publicly traded, and in the “Information and Communications” and “Manufacturing” sectors.
A large proportion of respondents’ office type is “head office”, and contract type is “leased building (fixed-term lease)” or “own building.”

■ **Characteristics of workplace initiatives**: In anticipation of improving human capital, these companies implement a workplace strategy that actively incorporates flexibility and options. While embracing flexible work styles that are not constrained by place or time, they also strategically emphasize the main office.

- **Average coming-to-office ratio**: 39%

  With the mainstream being telework-centered hybrid work, these companies actively develop and utilize various work location options, such as working from home (92.1%) and satellite offices (77.2%).

- **Direction of workplace strategies**

  [Emphasis on office strategies] High: These companies focus particularly on implementing ABW and establishing spaces that encourage both in-person and remote communication.

  [Implementation level of work style initiatives] Very high: These companies are highly proactive in implementing work style initiatives, particularly in providing workplace location allowances and introducing location-independent work style initiatives.

■ **Issues faced**: There is a strong awareness of issues in workplace operation that supports flexible work styles, such as controlling coming-to-office ratios, optimizing space, and improving cost efficiency. The shortage of spaces for in-person or remote meetings and work desks is particularly notable.

■ **Future intentions**:

- **In the office**: There are strong intentions to improve the office environment, particularly with a focus on expanding meeting room spaces and areas for concentration.
- **Outside the office**: There are very high intentions toward flexibly utilizing external services to supplement office functions, such as meeting rooms and workspaces that are used irregularly.

②Office Function Enhancers

#Office-centered hybrid work #Advanced office functions #Wellness #Sustainability

Basic attributes: Predominantly medium to large-sized, publicly traded, and in the "Manufacturing", "Construction" and "Finance, Insurance" sectors.
A large proportion of respondents' office contract type is "own building."

■ **Characteristics of workplace initiatives**: These companies position their main office as a strategic asset. They promote the development of offices that support employee well-being and organizational sustainability They are also expanding office space.

- **Average coming-to-office ratio**: 73%

  Although office-centered hybrid work is the mainstream, these companies are also working on establishing telework environments, such as a work-from-home policy (77.1%) and satellite offices (61.3%).

- **Direction of workplace strategies**

  [Emphasis on office strategies] Very high: In addition to adopting both fixed desks and hot desking, these companies have developed various layouts to enhance communication, improve comfort, and enhance sustainability.

  [Implementation level of work style initiatives] High in specific areas: Progress is seen in human resource development, digital transformation (DX) of operations, and advancement of office functions.

■ **Issues faced**: These companies face issues in transitioning from conventional layouts and fixed desk operations, seeking effective office design and operation to improve employee experience and enhance communication. Delays in staffing and organizational development are also issues in advancing office reform.

■ **Future intentions**:

- **In the office**: These companies place high priority on enhancing in-person communication spaces and are keen on expanding conference rooms, work desks, and open meeting spaces.

- **Outside the office**: In response to the varying frequencies of coming to the office and fluctuations in office usage needs due to the introduction of hybrid work, these companies also have high interest in workplace services such as telework support type workplaces and shared meeting rooms.

③Hybrids

#Combining coming to the office and working from home #Adapting to hybrid work #Emphasis on improving employee satisfaction

Basic attributes: Predominantly small companies with less than 100 employees, unlisted, and in the "Information and Communications", "Scientific Research, Professional and Technical Services" and "Services, n.e.c." sectors.
A large proportion of respondents' office type is "sales office."

■ **Characteristics of workplace initiatives**: The main form of teleworking is working from home. Offices and systems are being reviewed to establish this model. However, a cautious approach is still being taken.

- **Average coming-to-office ratio**: 64%

  Hybrid work, which combines coming to the office and working from home (91.3%), is the mainstream.

- **Direction of workplace strategies**

  [Emphasis on office strategies] Moderate: The office layout is mainly traditional, but there are also some hybrid work-friendly features, such as hot desking and open meeting spaces.

  [Implementation level of work style initiatives] Moderate / Somewhat high in some areas: The use of flextime programs, workplace location allowances, and tools to support telework is somewhat high.

■ **Issues faced**: The shortage of personnel to promote the creation of an office environment that is adaptable to hybrid work and the DX of workplaces is a relatively important issue compared to other types. The lack of meeting spaces, such as private rooms for remote meetings and conference rooms, tends to be somewhat high.

■ **Future intentions**:

- **In the office**: The intention to expand conference rooms, open meeting spaces, spaces for concentration, and work support spaces is somewhat high, indicating a positive tendency toward establishing office environments aimed at enhancing communication and improving operational efficiency under a hybrid work model.

- **Outside the office**: Although there is some interest in flexible offices, it is relatively low.

④Distributeds

#Combining coming to the office and working at satellite offices #Optimizing office space #Balancing office ownership, leasing, and service utilization

Basic attributes: Predominantly small companies with less than 100 employees, unlisted, and in the "Information and Communications", "Scientific Research, Professional and Technical Services" and "Services, n.e.c." sectors.
A relatively large proportion of respondents' office contract type is "services based on usage contracts other than leases (e.g., shared offices)."

■ **Characteristics of workplace initiatives**: These companies actively utilize satellite offices. There is a low willingness to invest in offices.

- **Average coming-to-office ratio**: 59%

  The availability of satellite offices is the highest among the five types at 94.9%.

- **Direction of workplace strategies**

  [Emphasis on office strategies] Low: While the transition from traditional fixed desks to hot desking is progressing, the office environment as a whole is designed to be minimalistic, limited to the necessary functions.

  [Implementation level of work style initiatives] Low / Somewhat high in some areas: The overall level is modest. On the other hand, these companies are relatively positive toward the use of generative AI and chat tools and the implementation of workcation programs.

■ **Issues faced**: In promoting distributed workplaces, there is a relatively strong awareness of issues in designing, operating, and making decisions on the workplace portfolio.

■ **Future intentions**:

- **In the office**: There are intentions to improve the comfort of the office environment, such as spaces for refreshing, cafes, and work support spaces.

- **Outside the office**: The demand for flexible offices, such as telework-support workplaces and shared meeting rooms, which complement office functions, is the highest among all types. In addition, there is an exceptionally high interest in workcation facilities, indicating continued intentions to promote a distributed workplace model.

⑤Maintainers

#Emphasizing coming to the office #Fixed desk-centered, traditional office operation #Oriented toward maintaining the status quo

Basic attributes: Predominantly small companies with less than 100 employees, unlisted, and in the “Construction” and “Wholesale and Retail” sectors.
A large proportion of respondents’ office type is “branch office.”

■ **Characteristics of workplace initiatives**: These companies place less emphasis on office strategies and have little interest in work style initiatives, sticking to traditional operations. There is a stronger tendency to maintain the status quo than to introduce new work styles.

- **Average coming-to-office ratio**: 79%. The highest percentage is 42.1% for coming to office full time.

  These companies tend to be reluctant to introduce telework environments.

- **Direction of workplace strategies**

  [Emphasis on office strategies] Somewhat low: Traditional office operations centered on fixed desks are still the mainstream.

  [Implementation level of work style initiatives] Low: These companies are cautious about initiatives that would ensure flexibility and diversity. They are also reluctant to reform work styles or invest in human resources, such as using technology, promoting business DX, and implementing human resource development measures.

  They are considered to be a group with a strong tendency towards stability, maintaining traditional systems and uniform work styles.

■ **Issues faced**: These companies are not significantly dissatisfied with the current situation, or issues may not have become evident yet.

■ **Future intentions**:

- **In the office**: There is little intention to expand the different spaces.

- **Outside the office**: Although interest in various types of flexible offices is generally low, the demand for shared spaces within office buildings and shared meeting rooms is over 30%, indicating expectations for improved environmental quality in the buildings they occupy and a desire to outsource meeting room functions that are difficult to maintain in-house.

2. Work style and workplace realities

1. Coming-to-office ratio
2. Availability of telework environment
3. Main office strategies
4. Work style initiatives

Coming-to-office ratio: ①Workplace transformers are the lowest; "100% (come to office full time)" accounts for over 40% among ⑤Maintainers

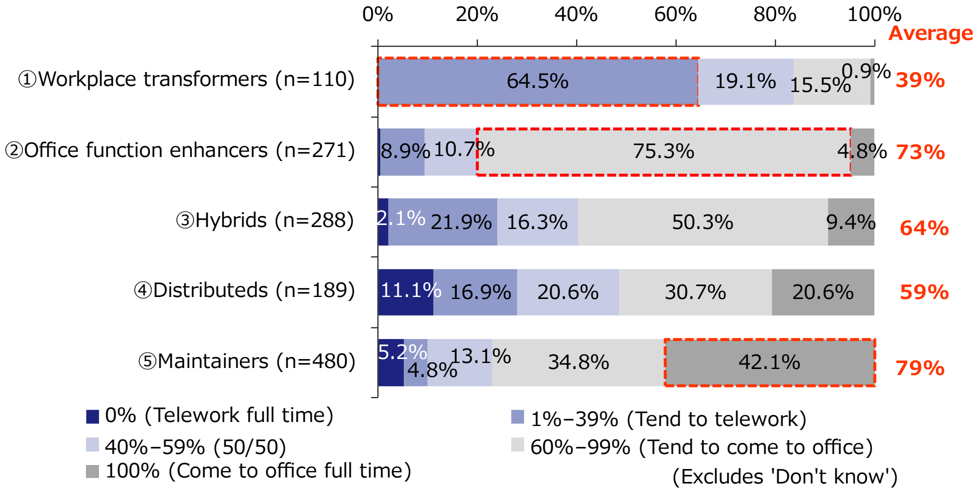
Figure 2 shows the coming-to-office ratios for the five company types at the time of the survey.

Among ①**Workplace transformers,** the average coming-to-office ratio is 39%, the lowest among all company types. With "1–39% (Tend to telework)" accounting for 64.5%, a hybrid work model centered on telework is the mainstream for this group.

On the other hand, ②**Office function enhancers** and ⑤**Maintainers** have an average coming-to-office ratio of over 70%, showing a tendency to prioritize coming to the office. However, while ②**Office function enhancers** predominantly adopt a "60–99% (Tend to come to office)" hybrid work model, ⑤**Maintainers** show a tendency to maintain a work style based on coming to the office, with "100% (Come to office full time)" accounting for the highest percentage of 42.1%.

The average coming-to-office ratio of ③**Hybrids** and ④**Distributeds** is around 60%, indicating that hybrid work is the mainstream approach for both types. Among ④**Distributeds**, however, the distribution of coming-to-office ratios varies widely from fully teleworking to fully coming to the office, with significant differences in policies between companies being a notable feature.

Figure 2: Current Coming-to-Office Ratio



While both adopt hybrid work, ③ works mainly from home, while ④ works primarily in satellite offices

Figure 3 shows the availability of telework environment of each of the five company types.

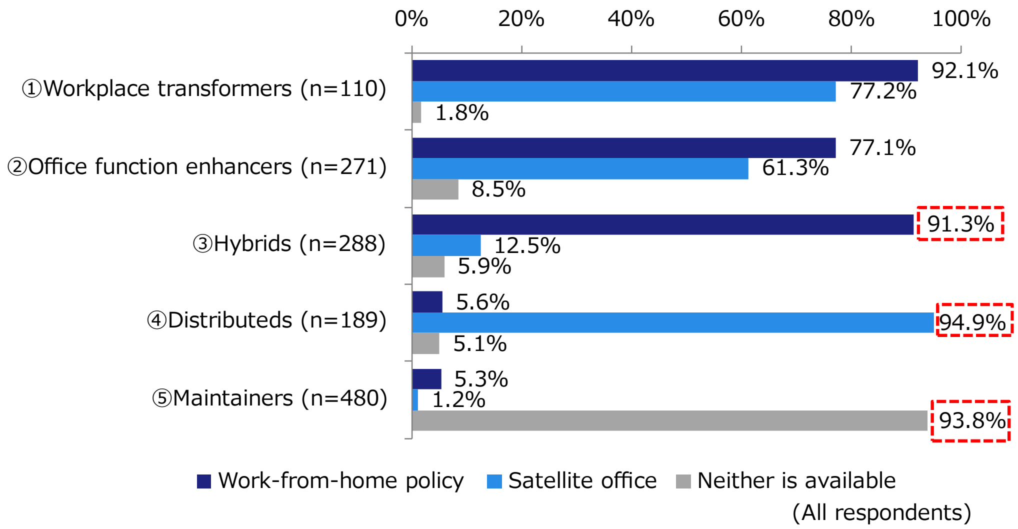
Among ①W**orkplace Transformers**, the availability of work-from-home policies and satellite offices is high at 92.1% and 77.2% respectively, indicating that they are actively establishing and utilizing diverse workplace options to achieve flexible work styles.

②**Office function enhancers** have predominantly adopted a hybrid work model that emphasizes coming to the office, but they are also working on establishing telework environments, such as work-from-home policies (77.1%) and satellite offices (61.3%).

While both ③**Hybrids** and ④**Distributeds** have high availability of telework environments, the former are centered on working from home, whereas the latter is centered around satellite offices.

On the other hand, ⑤**Maintainers** have a strong office-centric policy and have hardly made any efforts to establish alternative work environments such as work-from-home policies or satellite offices.

Figure 3: Availability of Telework Environment



① Workplace transformers and ②Office function enhancers stand out in their emphasis on the office

Upon examining the major focuses of each company type in office strategies, we found distinct characteristics for each type (Figure 4).

① and ② stand out in their focus on the main office, exceeding other types in all variables.

In particular, ①W**orkplace transformers** focus on “More active communication in the company”, “Employee motivation enhancement”, “Better work-life balance”, and “Support for balancing work and child/elderly care”, indicating that they place importance on offices as strategic bases for increasing human capital as well as promoting flexible work styles (① of Figure 4).

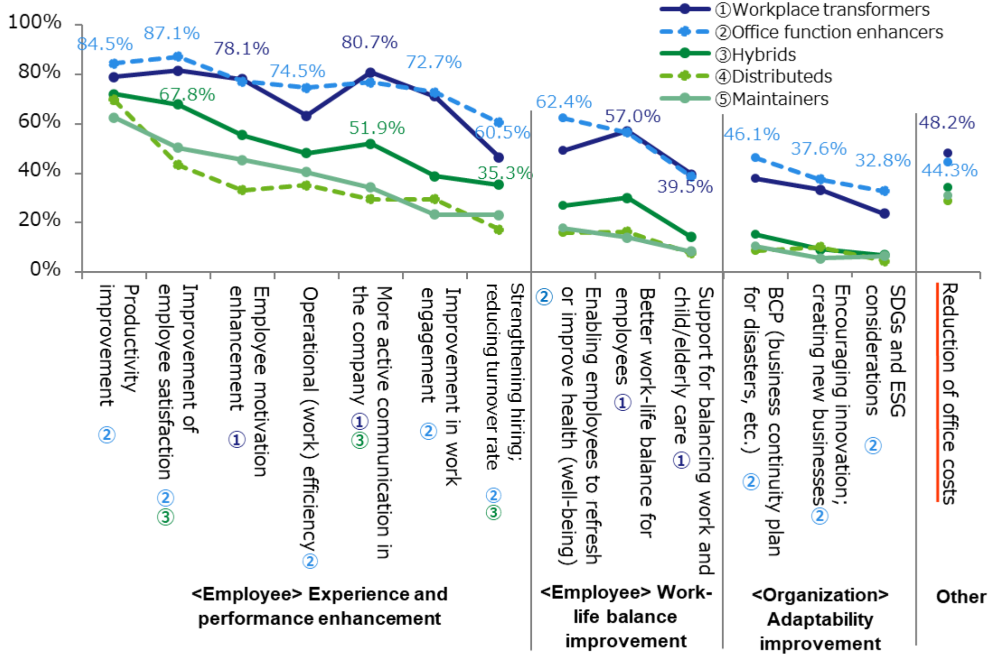
Based on the premise that the office is the primary workplace, ②**Office function enhancers** focus on features such as enhancing employee experience and performance, refreshing, and promoting health (well-being), and aims to create human-centered offices. They are also working to improve organizational adaptability, such as “BCP measures”, “Encouraging innovation; and creating new businesses”, and “SDGs and ESG considerations” (②).

Although ③**Hybrids** show an average trend overall, the results suggest a focus on maintaining employee engagement and ensuring organizational connection, which can easily be weakened with the spread of working from home. This is indicated in “Improvement of employee satisfaction”, “More active communication in the company” and “Strengthening hiring; reduction of turnover rate” (③).

④**Distributeds** and ⑤**Maintainers** tend to focus less on office strategies and have a low strategic positioning of the main office.

“Reduction of office costs” is a common element that all types focus on. ①W**orkplace transformers** and ②**Office function enhancers** focus particularly on this element, suggesting a tendency to strategically aim for the creation of valuable offices while being conscious of return on investment.

Figure 4: Major Focuses When Implementing Office Strategies*



(All respondents; MA; excerpt)

*The three categories of major focuses in office strategies (“<Employee> Experience and performance enhancement”, “<Employee> Work-life balance improvement” and “<Organization> Adaptability improvement”) are based on a factor analysis (see “Cluster Analysis Overview” at the end for details).

①Workplace transformers and ②Office function enhancers have high proportion of office size change

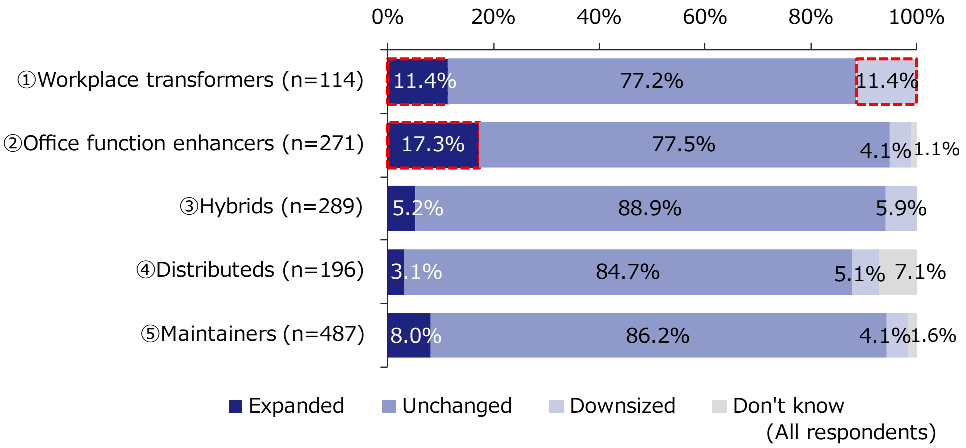
In terms of changes in office size over the past year, ①W**orkplace transformers** and ②**Office function enhancers** have a high proportion of office size change (Figure 5).

In particular, ①W**orkplace transformers** have the largest percentage of both expansion and downsizing, suggesting that they are making changes to their offices to seek the optimal form of the office.

Meanwhile, ②**Office function enhancers** have the largest percentage of respondents who answered "Expanded" (17.3%). As seen in Figure 4, they view the office as the core of business growth and employee satisfaction and are actively investing in improving its value.

Types ③**–**⑤ have more than 80% of respondents who answered their office size was "Unchanged." Among these three types, ⑤**Maintainers** have a somewhat high percentage (8.0%) of "Expanded", suggesting that they have expanded their office size to accommodate the increase in headcount.

Figure 5: Change in Office Size over Past Year



Office layouts reflect differences in values regarding the office

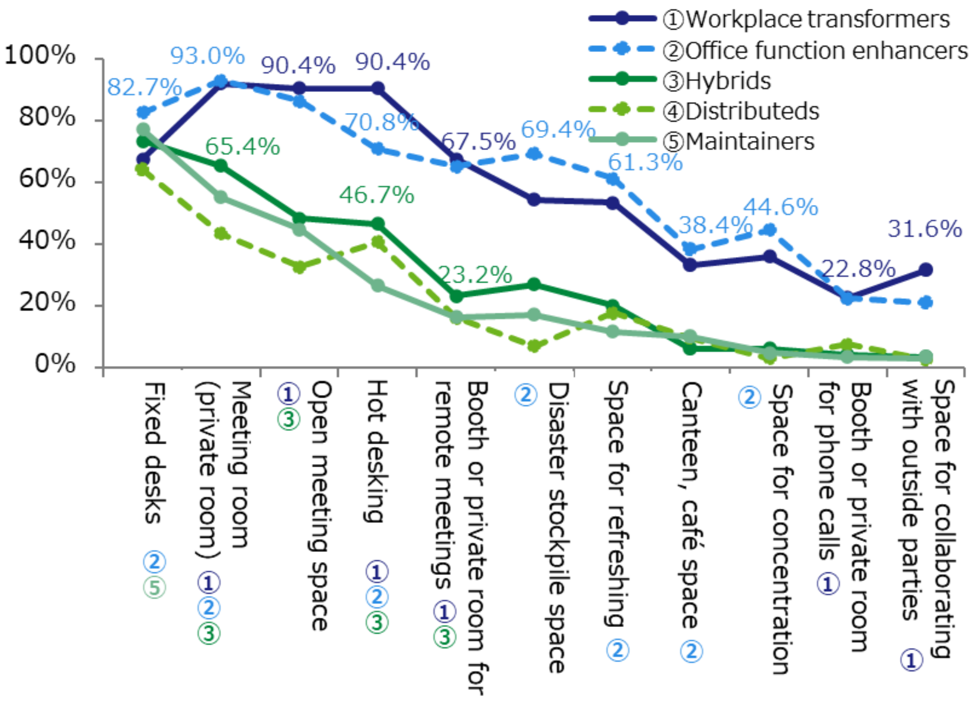
Figure 6 shows the actual state of office environment development by company type.

① **Workplace transformers** and ②**Office function enhancers** have high availability rates in many spaces and are both actively working to develop the office environment. In particular, ①W**orkplace transformers** have high availability rates of spaces that encourage more active communication, both in person and remotely (①). Meanwhile, ②**Office function enhancers** offer the highest availability among the five types for variables related to comfort, wellness, and sustainability, such as “Space for concentration”, “Space for refreshing”, “Canteen, cafe space”, and “Disaster stockpile space”. This type also has high availability of both fixed desks and hot desking, which indicate that the combination of fixed desks and hot desking has become the mainstream on the back of high coming-to-office ratios (②).

③**Hybrids** show a tendency of adapting their office environments to telework, such as “Hot desking”, “Meeting room”, “Open meeting space”, and “Booth or private room for remote meetings” (③).

④**Distributeds** and ⑤**Maintainers** both have low availability in a lot of the spaces. ④**Distributeds** limit the spaces to the minimum necessary, suggesting a tendency to prioritize office operation with a focus on efficiency and cost. On the other hand, ⑤**Maintainers** suggest that they are oriented toward maintaining traditional offices centered around fixed desks.

Figure 6: Spaces Currently Available in the Office



(All respondents; MA; excerpt)

①Workplace transformers have highest level in all initiatives; types ②–④ focus on specific areas

When we look at the implementation of work style initiatives in Figure 7,① **Workplace transformers** show the highest levels in all work style initiatives. This type stands out from other types, particularly in its approach to workplace location allowances and initiatives for work styles that are not constrained by place or time. This indicates a strong orientation toward workplace strategies that actively incorporate flexibility and choice to support employee well-being (①).

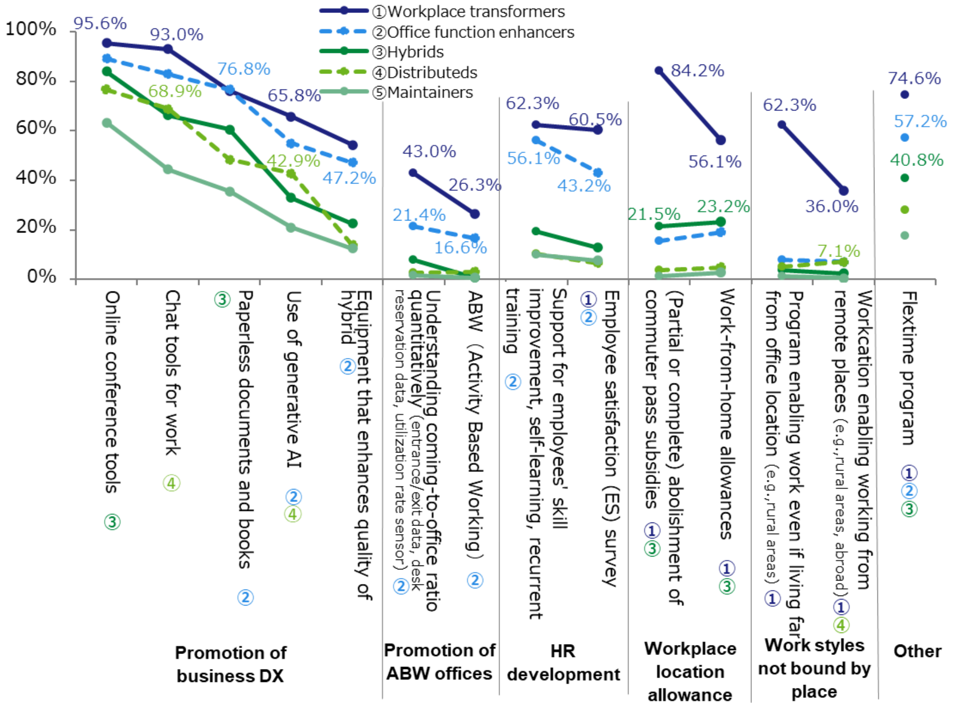
②**Office function enhancers** have a relatively high adoption rate for initiatives such as human resource development, business DX promotion, and ABW office promotion compared to other types. Furthermore, while they have a high adoption rate of flextime programs, a work style that is not bound by time, efforts towards a work style that is not bound by place remain at a low level (②).

③**Hybrids** are relatively advanced in flextime programs, reviewing allowance systems that correspond to working from home, and the availability of basic ICT environments that support telework as part of promoting working from home (③).

④**Distributeds** are conservative in their implementation overall, but there is a relatively positive trend in some advanced and flexible work-style initiatives, such as the use of generative AI and chat tools and the implementation of workcation programs (④).

⑤**Maintainers** are low in most initiatives.

Figure 7: Implementation of Work Style Initiatives*



(All respondents; MA; excerpt)

*The five categories of work style initiatives ("Promotion of business DX", "Promotion of ABW offices", "HR development", "Workplace location allowance", and "Work styles not bound by place") are based on a factor analysis (see "Cluster Analysis Overview" at the end for details).

3. Issues faced and future directions

1. Issues of the main office
2. Issues related to workplace strategies
3. Future direction of workplace strategies

“Lack of meeting rooms” is the common top issue

Regarding issues of the main office, the top issues common to all five company types were “Difficulty in adjusting temperature to a comfortable level” (physical comfort issue) and “Lack of meeting rooms” (functional comfort issue). On the other hand, there are also characteristic issues for each type (Figure 8).

① **Workplace transformers** face a noticeable shortage of spaces for in-person and remote meetings, as well as work desks. This indicates that aligning office needs with the office environment and optimizing office layouts in the face of the spread of flexible work styles has become a major challenge (①).

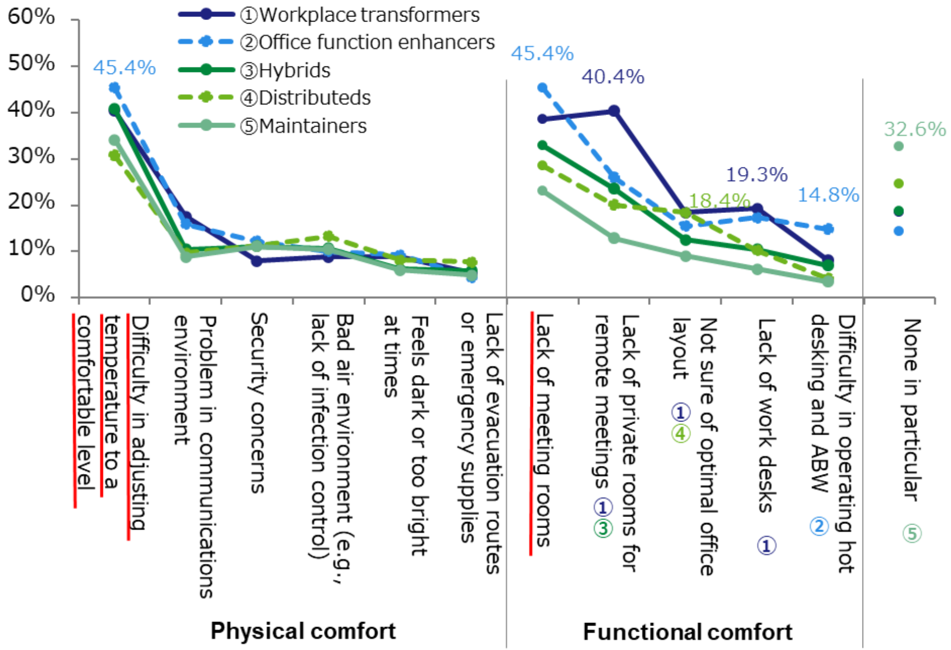
②**Office function enhancers** have a greater sense of issue than other company types in “Difficulty in operating hot desking and ABW”, suggesting that they face issues in transitioning from conventional layouts or fixed desks (②).

③**Hybrids** have a somewhat higher sense of lack of meeting room space (③).

④**Distributeds** faces issues in designing a layout that adapts to flexible work styles (④).

⑤**Maintainers** have a notably high percentage of respondents who answered “None in particular”, suggesting that they may not be significantly dissatisfied with the current situation or that issues have not yet become apparent (⑤).

Figure 8: Issues Felt in Current Main Office



(All respondents; MA; excludes 'Other')

Different workplace strategy issues between company types have become apparent

In terms of problems and issues related to workplace strategies (Figure 9), ① **Workplace transformers** show a strong awareness of issues in workplace operations that cater to flexible work styles, such as controlling coming-to-office ratios, optimizing office size, and improving cost efficiency (①).

②**Office function enhancers** show concerns about controlling coming-to-office ratios, as well as personnel shortages and system issues in implementing office reform (②).

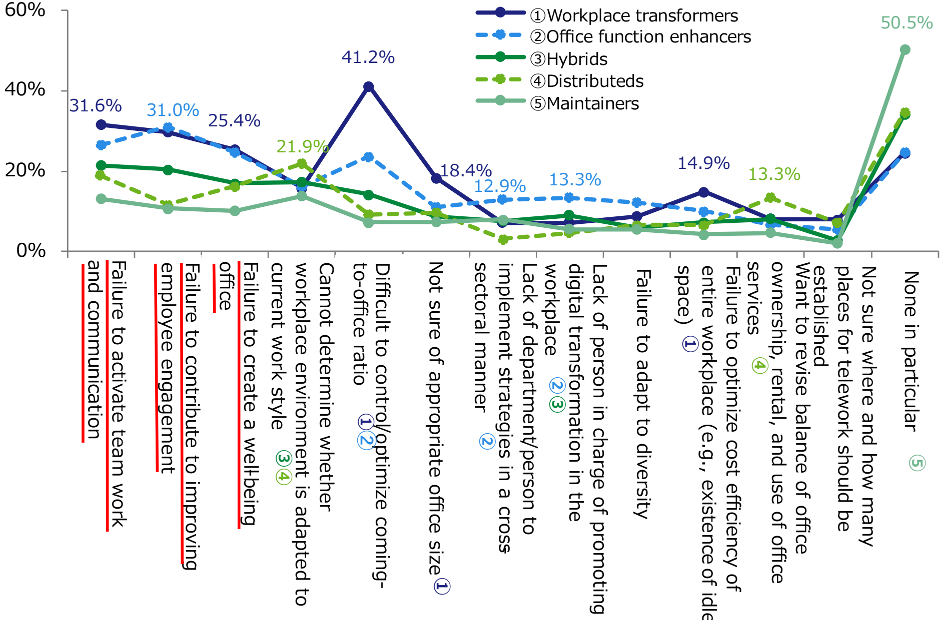
Among ③**Hybrids**, the creation of an office environment to adapt to hybrid work and the shortage of personnel to promote workplace DX are relatively important issues compared to other company types (③).

In addition, among types ①–③, the percentages of “Failure to activate teamwork and communication”, “Failure to contribute to improving employee engagement”, and “Failure to create a well-being office” were high, suggesting a strong awareness of the issues in creating an office that enhances employee experience.

④**Distributeds** have a relatively high awareness of the issues in portfolio design, management, and decision-making for promoting a distributed workplace model (④).

The majority of responses by ⑤**Maintainers** are “None in particular”, which suggests that they have no dissatisfaction with the current situation and intend to maintain the status quo (⑤).

Figure 9: Issues Related to Workplace Strategies



(All respondents; MA; excludes 'Other')

Intention to increase meeting room space is top priority regardless of company type

Different tendencies can be seen in the future direction of workplace strategies for each type of company. To understand these differences, we have summarized companies' intentions to establish or increase each space in the office in Figure 10.

① **Workplace transformers** show strong intentions to increase "Meeting room space" and "Space for concentration", suggesting desires to strengthen both individual and collaborative work spaces.

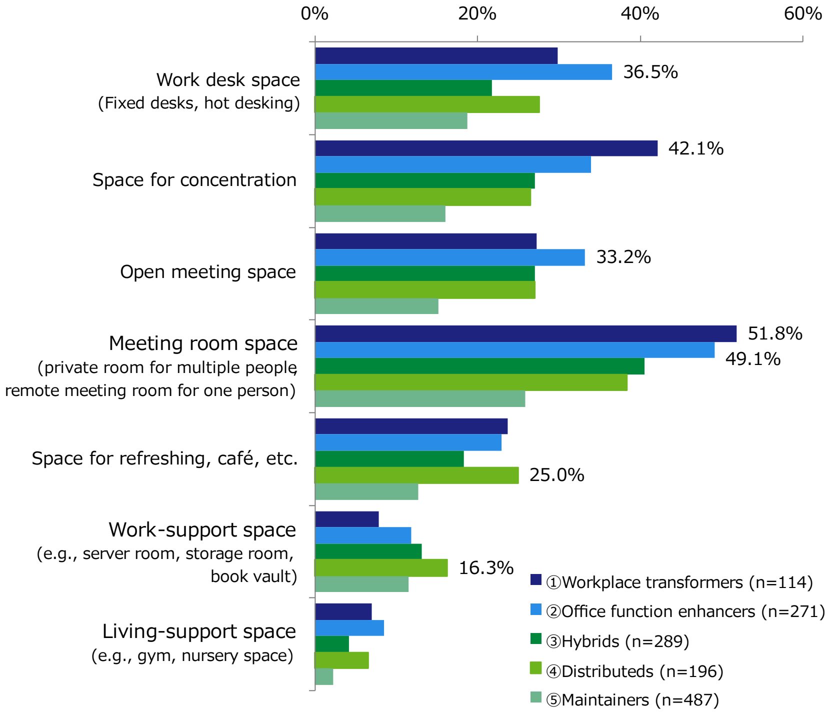
②**Office function enhancers** place emphasis on increasing in-person communication spaces, such as "Meeting room space", "Work desk space", and "Open meeting space".

③**Hybrids** have average percentages in many variables.

④**Distributeds** have higher intentions to increase "Space for refreshing, cafes, etc." and "Work support spaces" compared to other types, which suggests their intentions to improve the comfort of the office environment.

⑤**Maintainers** have low intentions to increase space overall.

Figure 10: Intention to Establish or Expand Space in the Office



(All respondents; percentage of respondents who answered 'Want to increase' the space)

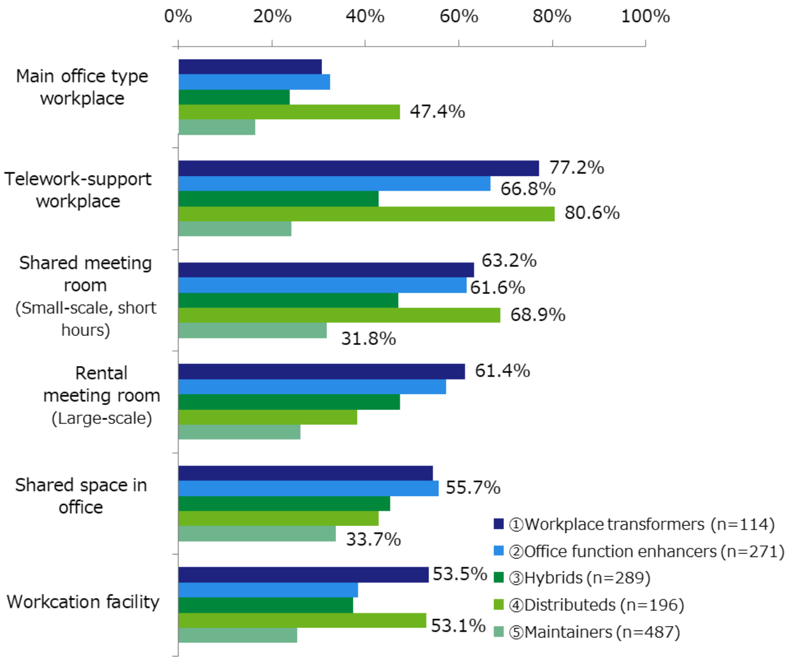
Strong interest in "Telework-support workplace" and "Shared meeting room", notably among ④Distributeds

In terms of interest in using flexible offices, ①**Workplace transformers**, ② **Office function enhancers**, and ④**Distributeds** show extremely high levels of interest in flexible offices that can flexibly supplement and utilize office functions, such as "Telework-support workplace" and "Shared meeting room (small-scale, short hours)" (Figure 11).

① **Workplace transformers** and ④**Distributeds** also have high interest in "Workcation facility", suggesting intentions to continue promoting diverse workplaces.

On the other hand, ③**Hybrids** and ⑤**Maintainers** have lower interest overall but show a certain demand for options such as "Shared meeting room" and "Shared space in office buildings."

Figure 11: Interest in Using Flexible Offices*



(All respondents; sum of percentage of respondents who answered 'Already using' or 'Interested' in the flexible office)

*For details on the various types of flexible offices, please refer to *Metropolitan Areas Office Demand Survey Spring 2025* released on July 30, 2025.
https://www.xymax.co.jp/english/assets/pdf/news_research/20250730_Detailed.pdf

4. Conclusion

4. Conclusion

In this report, we categorized companies into five types based on differences in workplace strategies and identified the characteristics and specific initiatives of each type.

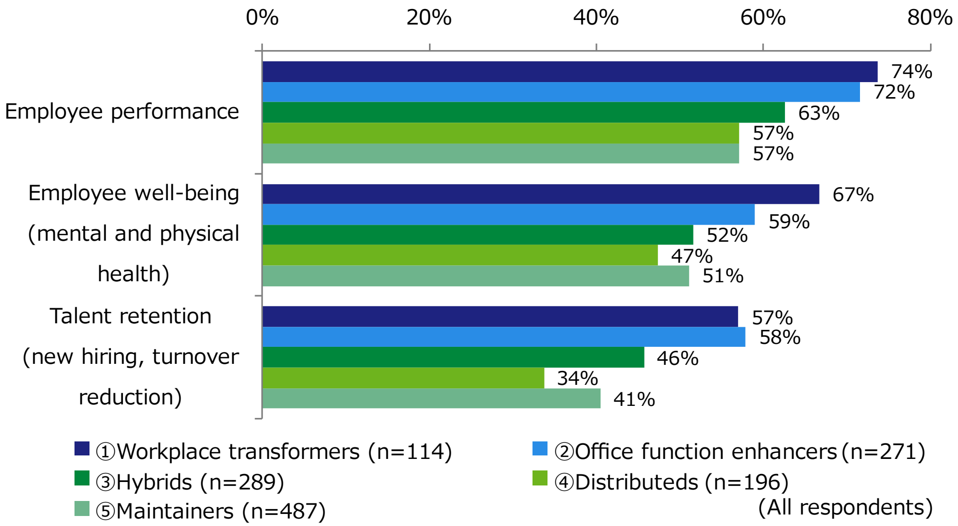
While ①W**orkplace transformers** and ②**Office function enhancers** have different values and orientations, they tend to be more proactive in investing in the workplace compared to other types and were found to have a strong sense that the workplace contributes to corporate performance in terms of “Improving employee performance”, “Promoting well-being”, and “Retaining talent” (Figure 12).

On the other hand, ③**Hybrids**, ④**Distributeds**, and ⑤**Maintainers** are cautious or in an exploratory phase about workplace investment at the moment. However, the results suggest potential needs for features for the future, such as creating workplace environments suitable for new work styles and utilizing external workplace services.

In a rapidly changing business environment, improving productivity, retaining talent, and strengthening adaptability to change are management issues essential for sustainable growth for all companies. In this context, the perspective of rethinking the workplace not just as a cost but as a strategic management resource is becoming more important than ever.

However, this does not mean that every company should uniformly introduce hybrid work or advanced office strategies. We hope that this analysis will help companies redefine the optimal workplace that suits their business characteristics, management policies, and human resource strategies, and serve as a reference for considering future strategies.

Figure 12: Current Workplace Environment Contribution Level*



*Workplace environment contribution level: The total percentage of responses that indicate the current workplace environment is “Contributing” or “Contributing somewhat” to the following three indicators: “Employee performance”, “Employee well-being (mental and physical health)”, and “Talent retention (new hiring, turnover reduction)”.

Cluster Analysis Overview

Data source	Metropolitan Areas Office Demand Survey Spring 2025 https://www.xymax.co.jp/english/assets/pdf/news_research/20250730_Detailed.pdf
Analysis targets	General office tenants occupying office buildings in the Tokyo Metropolitan Area
Number of valid responses	1,357
Analytical method	Hierarchical clustering using Gower's distance and Ward's method List of variables for defining clusters: ● Actual coming-to-office ratios ● Variables related to the availability of a telework environment: ・Availability of a work-from-home policy ・Availability of satellite offices ● Variables related to main office strategies: ・Major focuses when implementing office strategies* ・Change in office size over the past year ・Actual layout in the main office ● Implementation of work style initiatives* *For "Major focuses when implementing office strategies" and "Implementation of work style initiatives", a factor analysis was conducted, and the resulting factors and their factor scores were used as variables for clustering.