Metropolitan Areas Office Worker Survey 2025

<Detailed Report>

Capturing changes in workers’ work styles and values

November 21, 2025

Xymax Research Institute

Survey Overview

To capture changes in work styles and locations from the perspective of both companies and office workers, Xymax Research Institute has conducted regular surveys since 2016.

This report summarizes the latest trends in the actual situation of work styles and values of workers in metropolitan areas based on the results of the 10th office worker survey conducted in September 2025.

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%.

<Related surveys>
・*Metropolitan Areas Office Worker Survey 2024* published on December 9, 2024
https://www.xymax.co.jp/english/assets/pdf/news_research/20241209_2.pdf

Survey period	September 2025
Target respondents	(1) Screening: Men and women aged 20 to 69 residing in the survey area whose occupations are business owner/executive, company employee, self-employed, or freelancer (2) Main survey: Screening survey respondents whose occupation is “executive of company/organization, employee of company/organization, self-employed (excluding shop owners),” job category is “managerial, specialized/technical, clerical, sales,” regular office location is “Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures), Osaka City, Nagoya City, Fukuoka City,” residence is in “Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures), or Gifu, Aichi, Mie, Shiga, Kyoto, Osaka, Hyogo, Nara, Wakayama, Fukuoka, and Saga prefectures” and whose current principal place of work is “office, home”
Number of valid answers	4,120 Allocated according to the location of the respondent’s regular office. (Greater Tokyo: 2,060; Osaka City: 1,030; Nagoya City: 515; Fukuoka City: 515)
Geographical coverage	Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures) and Gifu, Aichi, Mie, Shiga, Kyoto, Osaka, Hyogo, Nara, Wakayama, Fukuoka and Saga prefectures
Survey method	Online

Survey Overview

xymax

Attributes of Respondents: All Respondents (n=4,120)

Gender and age	Male aged 20-29	85 (2.1%)
	Male aged 30-39	254 (6.2%)
	Male aged 40-49	561 (13.6%)
	Male aged 50-59	1,013 (24.6%)
	Male aged 60 or older	797 (19.3%)
	(Male total)	2,710 (65.8%)
	Female aged 20-29	159 (3.9%)
	Female aged 30-39	371 (9.0%)
	Female aged 40-49	380 (9.2%)
	Female aged 50-59	382 (9.3%)
	Female aged 60 or older	118 (2.9%)
	(Female total)	1,410 (34.2%)
Employ-ment type	Executive of company/organization	324 (7.9%)
	Employee of company/organization (management)	989 (24.0%)
	Employee of company/organization (Regular employee excl. management)	1,973 (47.9%)
	Employee of company/organization (Excl. regular employee)	670 (16.3%)
	Self-employed (excl. shop owners)	164 (4.0%)

Number of employees at workplace	1–9	485 (11.8%)
	10–49	493 (12.0%)
	50–99	327 (7.9%)
	100–299	564 (13.7%)
	300–999	605 (14.7%)
	1,000–2,999	514 (12.5%)
	3,000 or more	1,024 (24.9%)
	Don't know	108 (2.6%)
Job category	General office work/reception/secretary	952 (23.1%)
	Sales	910 (22.1%)
	Technical specialist, e.g. for R&D, design, SE	763 (18.5%)
	Admin/HR/accounting	756 (18.3%)
	Corporate planning	352 (8.5%)
	Creative specialist, e.g., editor, designer, writer	120 (2.9%)
	Clerical specialist, e.g., research analyst, patent law attorney	66 (1.6%)
	Other	201 (4.9%)

Sector	Manufacturing	825 (20.0%)
	Information & communications	619 (15.0%)
	Wholesale & retail trade	480 (11.7%)
	Services, N.E.C.	386 (9.4%)
	Finance & insurance	385 (9.3%)
	Construction	280 (6.8%)
	Real estate & goods rental and leasing	235 (5.7%)
	Scientific research, professional & technical services	187 (4.5%)
	Transport & postal activities	157 (3.8%)
	Medical, health care & welfare	111 (2.7%)
	Education, learning support	83 (2.0%)
	Electricity, gas, heat supply and water	64 (1.6%)
	Living-related and personal services & amusement services	58 (1.4%)
	Accommodation, eating & drinking services	48 (1.2%)
	Compound services	37 (0.9%)
	Government, except elsewhere classified	30 (0.7%)
	Agriculture and forestry	4 (0.1%)
	Mining and quarrying of stone and gravel	2 (0.0%)
	Fishery	1 (0.0%)
	Other & industries unable to classify	128 (3.1%)

Main Findings

1. **Actual Situation of Work Styles (p.5-)**
   - When we asked respondents whether they came to the office or teleworked, “Coming to office full time” accounted for 53.9%, showing no significant change since the 2023 survey. By office location, the proportion of “Coming to office full time” was 46.9% in Greater Tokyo and around 60% in regional cities.
   - As for “Working from home” and “Working from a satellite office,” “Working from home” accounted for 44.3%, while “Working from a satellite office” accounted for 8.3%, showing no significant change since the 2023 survey. By office location, the proportion of respondents in Greater Tokyo working from home was over 50%, which is more than 10 percentage points higher than in regional cities. On the other hand, the proportion of respondents “working from a satellite office” showed little variation across regions.
   - Regarding work style measures, relatively advanced initiatives such as side jobs, workation, and living and working at two locations showed a certain level of demand despite their current low adoption rates.
   - Regarding the layout within their regular office, “canteen, café space,” “space for refreshing,” “space for concentrating,” and “nap room, massage room, etc.” showed a higher percentage of demand than the percentage of respondents indicating they currently use them. This indicates a need for office layouts that facilitate well-being and make it easier to switch between work and rest.

2. **Values (p.20-)**
   - While “Coming to office full time” was the majority response for current work styles, “Hybrid work” (44.9%) surpassed “Coming to office full time” (40.8%) as the ideal work style. In particular, the proportion of respondents in their 20s and 30s who chose “coming to office full time” as their ideal work style was over 15 percentage points lower than the proportion of respondents in those age groups who currently come to the office full time. This suggests that younger generations tend to prefer flexible work styles.
   - When asked about the effect and changes to work due to digital transformation (DX), only 6.2% responded that it is “already affecting.” However, when combined with those who believe DX “will probably affect (somewhat),” we found that over half feel DX is having an effect.

3. **Evaluation and Needs (p.26-)**
   - The percentage of respondents who said they are able to choose where to work was 41.4%, falling below the percentage who said they are not able to do so (45.5%).
   - 69.2% of workers responded that their work environment “affects” their engagement with the company and their work. A breakdown of this result by age group shows that younger respondents are more likely to think that their work environment has an effect.
   - Regarding satisfaction with work styles, approximately half of the workers are dissatisfied with their current work arrangements. By age group, satisfaction is lowest overall among those in their 30s.
   - In terms of the respondents’ dissatisfaction and issues with their current work style, “Stressful commute” (44.3%) and “Required to come to office even if the work can be done by teleworking ” (39.9%) were by far the most popular responses. In particular, those in their 30s showed a higher proportion of dissatisfaction with items such as “Required to come to office even if the work can be done by teleworking” compared to other age groups.
   - The most common dissatisfaction or issue regarding meetings was “Lack of meeting rooms or private rooms for remote meetings” (54.2%).
   - The proportion of respondents with an intention to change jobs from their current workplace was 30.3% overall. Younger people are more likely to consider changing jobs.
   - The top condition for the office that respondents want to go to work at was “Availability of work facilities.” Focusing on the needs of those in their 30s, conditions such as “Easy to concentrate on work,” “Easy communication (e.g., casual conversation),” and “Easy business communication (e.g., negotiations)” rank higher than among other age groups.

1. Actual Situation of Work Styles

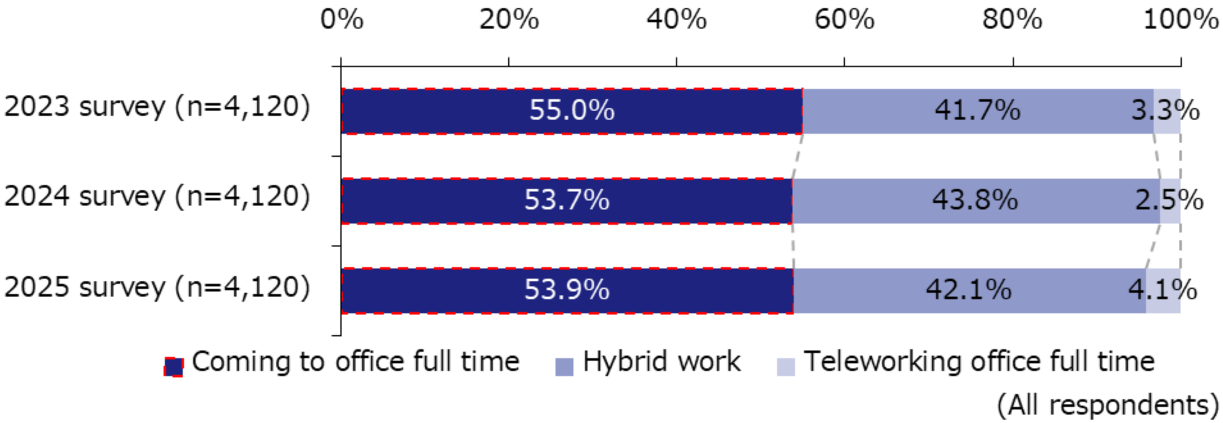
1. Coming to the Office or Teleworking
2. Work Style initiatives
3. Usage of the Main Office

Work styles remain unchanged from previous surveys, with “Coming to office full time” accounting for 53.9%

Work styles of target respondents were categorized into three types—“Coming to office full time,” “Hybrid work,” and “Teleworking full time”—and examined over time (Figure 1).

While some companies have announced policies to return employees to the office, this survey found that “Coming to office full time” accounted for 53.9%, showing no significant change since the 2023 survey.

Figure 1: Coming to the Office or Teleworking



Regardless of location or workforce size, no major change in coming to office/teleworking

Figure 2 shows the breakdown of Figure 1 by office location. In the 2025 survey, the proportion of workers in Greater Tokyo who come to the office full time was 46.9%, while in regional cities it was around 60%. No significant changes in work styles were observed in any region.

Similarly, when examining the results by the size of the employer's workforce, this survey found that 67.6% of workers employed by small companies with less than 100 employees were “coming to office full time,” while only 40.5% of those at large companies with 1,000 or more employees were doing so. This indicates that the larger the company, the higher the proportion of employees teleworking (Figure 3). Over time, there was no significant increase or decrease in the proportion of employees “coming to office full time,” regardless of company size. It is likely that the increase in “Teleworking full time” among companies with less than 100 employees is largely attributed to the inclusion of self-employed individuals in the survey starting this time.

Figure 2: Coming to the Office or Teleworking – By Office Location

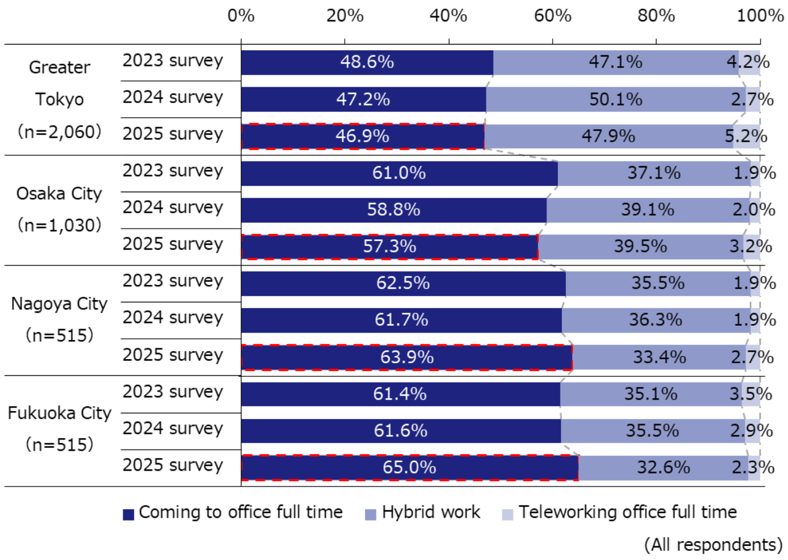
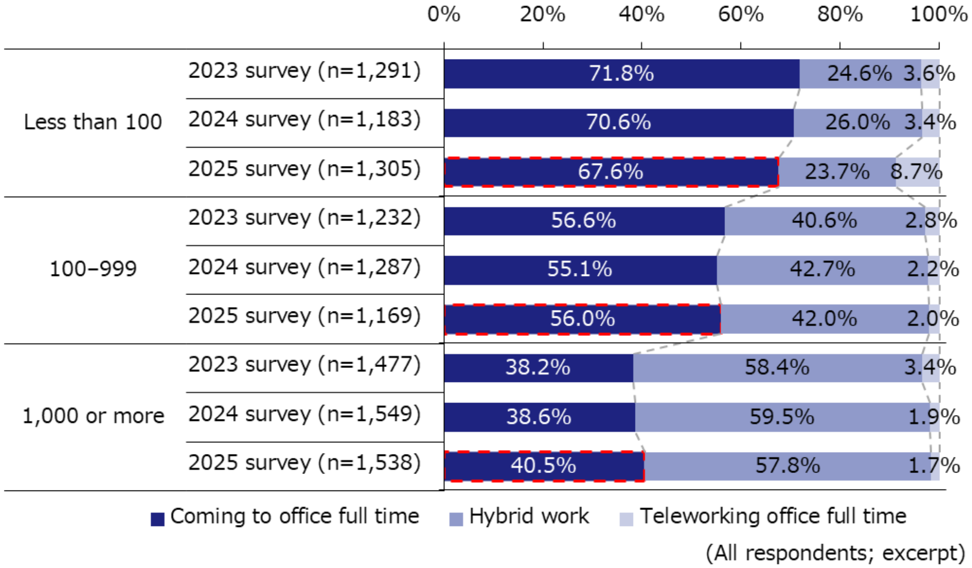


Figure 3: Coming to the Office or Teleworking – By Size of Employer’s Workforce

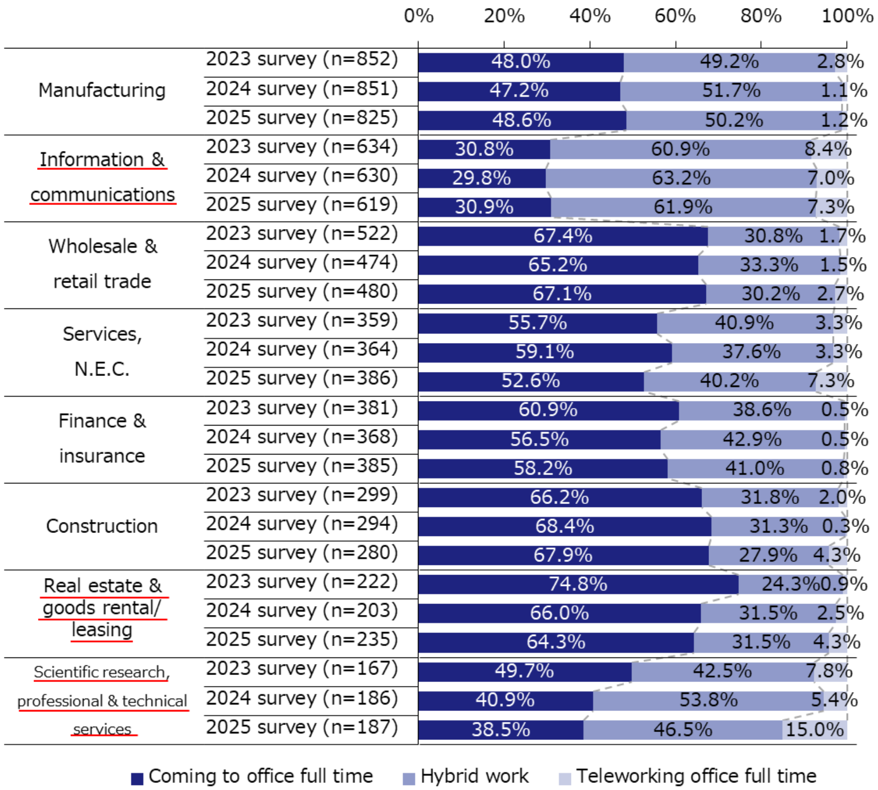


"Coming to office full time" accounts for approx. 30% in information & communications sector, smaller than in other sectors

Figure 4 shows the breakdown of Figure 1 by sector. There are differences in the degree of coming to the office versus telework depending on the sector. In the information & communications sector, the proportion of "Coming to office full time" (30.9%) is lower compared to other sectors, while the proportion of "Teleworking full time" (7.3%) is slightly higher.

While most sectors have seen no change in work styles since the 2023 survey, the proportion of "Coming to office full time" has been declining in the "Real estate & goods rental and leasing" and "Scientific research, professional & technical services" sectors. In the "Scientific research, professional & technical services" sector, an increase in the proportion of "Teleworking full time" was also observed.

Figure 4: Coming to the Office or Teleworking – By Sector



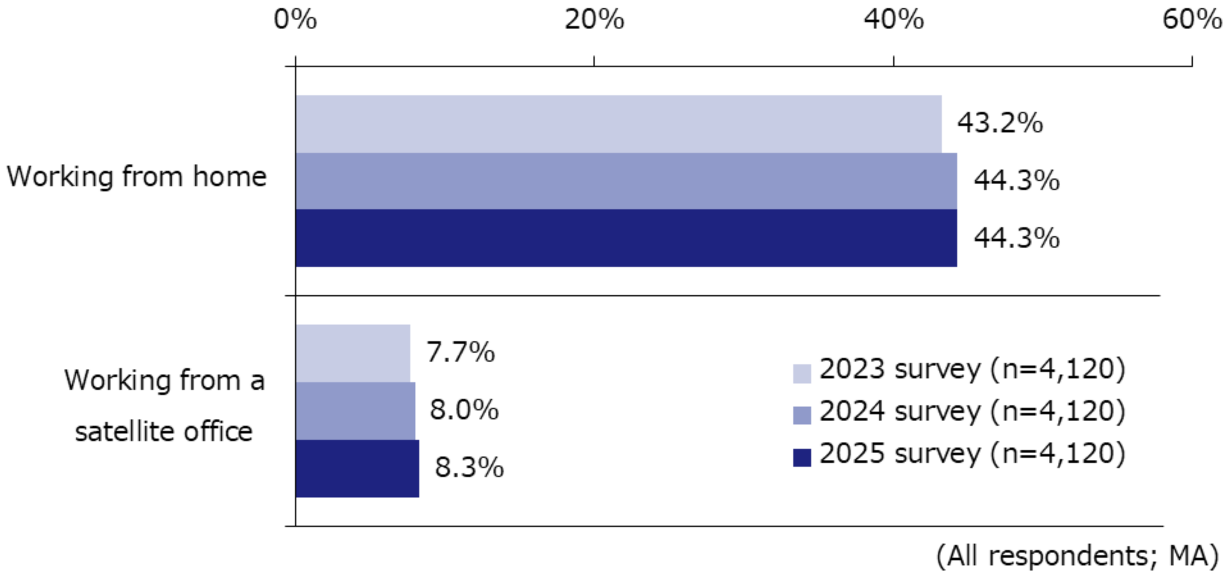
(All respondents; excerpt)

Around 40% of respondents work from home; a little under 10% work from a satellite office

Figure 5 shows the implementation status of working from home and working from a satellite office as telework initiatives over the years.

“Working from home” accounted for 44.3%, while “Working from a satellite office” accounted for 8.3%, both showing no significant change since the 2023 survey.

Figure 5: Implementation Rates of Working from Home and Satellite Offices



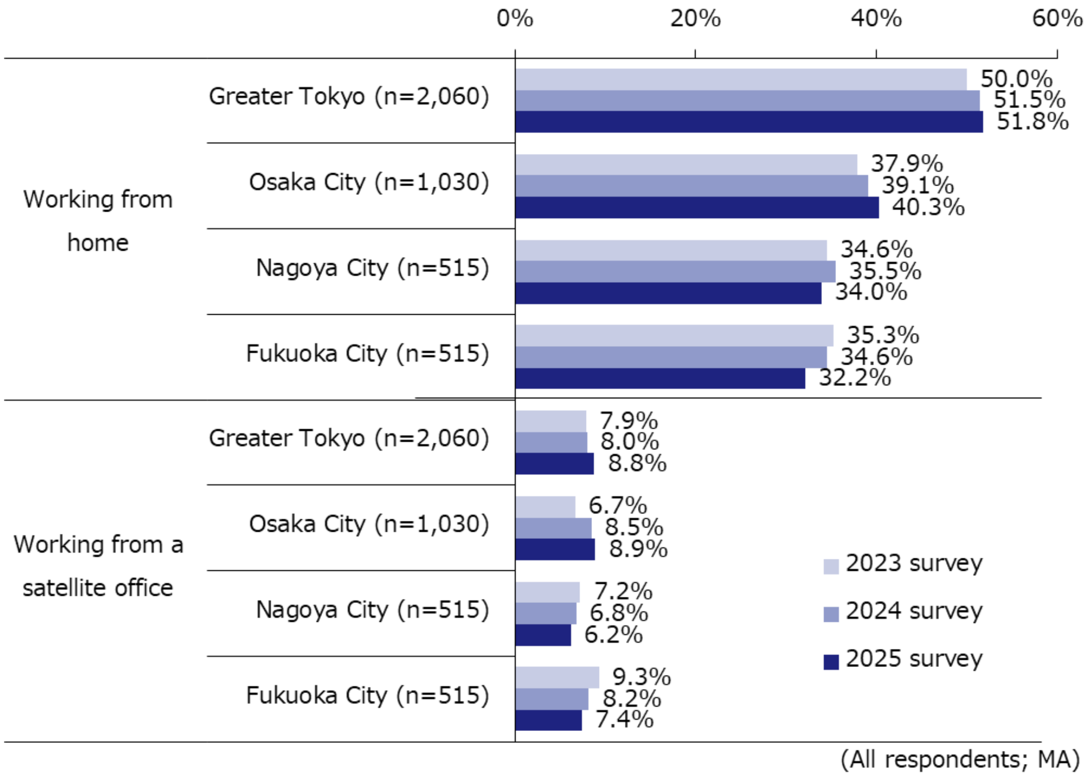
Percentage of those working from home is over 10 points higher in Greater Tokyo than in regional cities

Looking at the results of Figure 5 by office location, over 50% of workers in Greater Tokyo are working from home, which is more than 10 percentage points higher than in regional cities (Figure 6).

On the other hand, the percentage of respondents “working from a satellite office” shows little regional variation: 8.8% in Greater Tokyo, 8.9% in Osaka City, 6.2% in Nagoya City, and 7.4% in Fukuoka City.

Looking at the results over the years, neither the percentage of working from home nor that of satellite offices showed significant changes from previous surveys in any region.

Figure 6: Implementation Rates of Working from Home and Satellite Offices – By Office Location

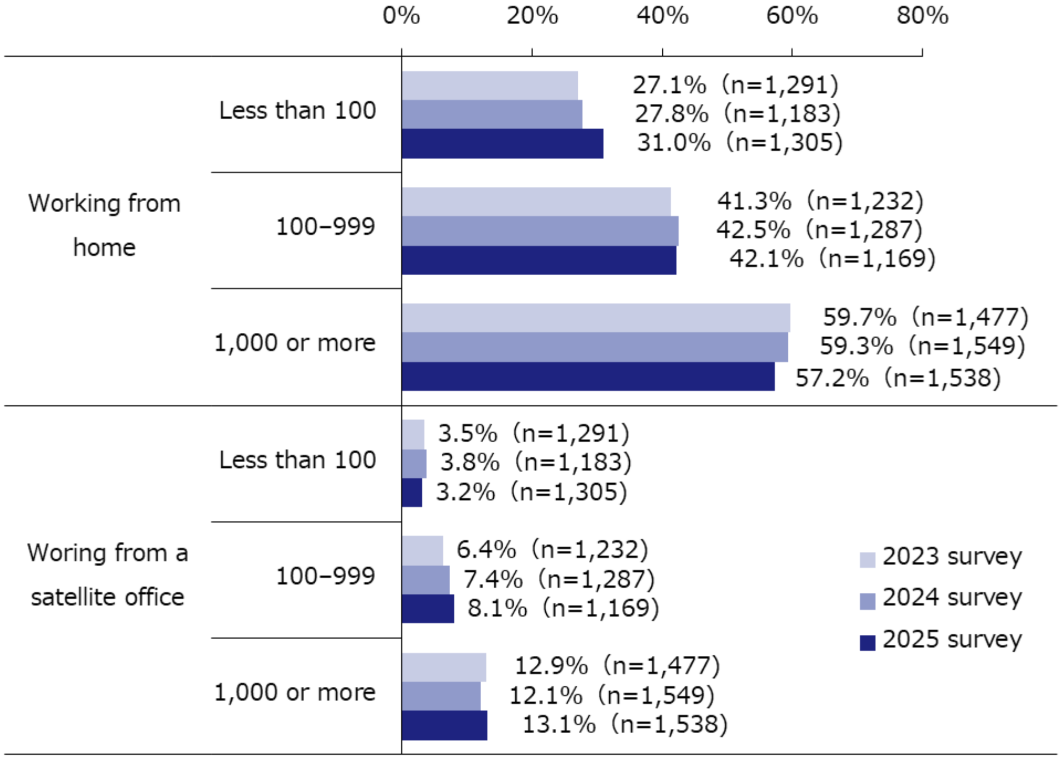


Employees of large companies have higher rates of working from home and satellite offices

We then examined the results by the size of the employer's workforce and found that the implementation rate for both “Working from home” and “Working from a satellite office” was higher at larger companies (Figure 7).

The rate of working from home shows an increasing trend among workers at small companies with less than 100 employees, while a slight decrease is observed at large companies with 1,000 or more employees. This suggests that changes in the trend of working from home may progress differently depending on company size going forward.

Figure 7: Implementation Rates of Working from Home and Satellite Offices – By Size of Employer’s Workforce



(All respondents; MA; excerpt)

Nearly 70% of workers in the information & communications sector work from home

Similarly, the results broken down by sector are shown in Figures 8 and 9.

The implementation rate of working from home varies by sector, with the highest rate seen in the information & communications sector, reaching nearly 70%. The information & communications sector also tends to have a higher implementation rate of satellite office work compared to other sectors, with 12.0% having adopted it in the 2025 survey.

Figure 8: Implementation Rate of Working from Home – By Sector

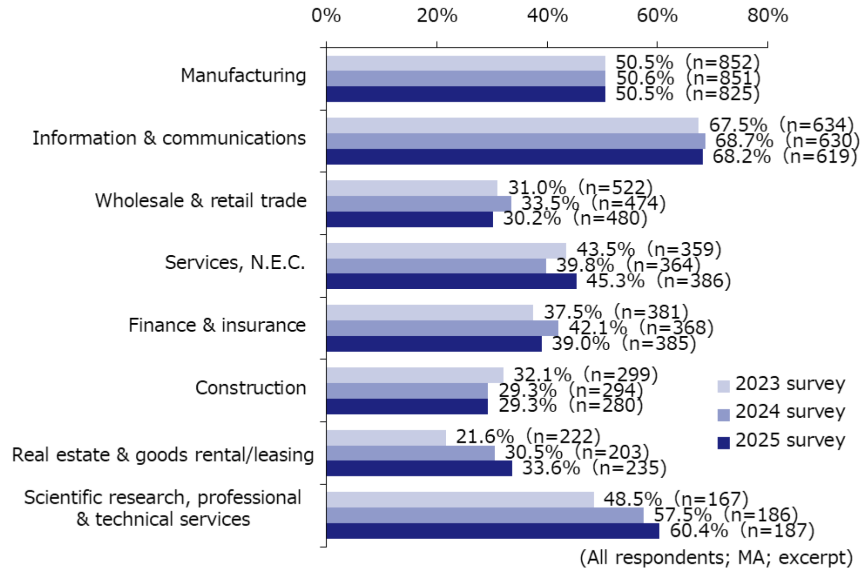
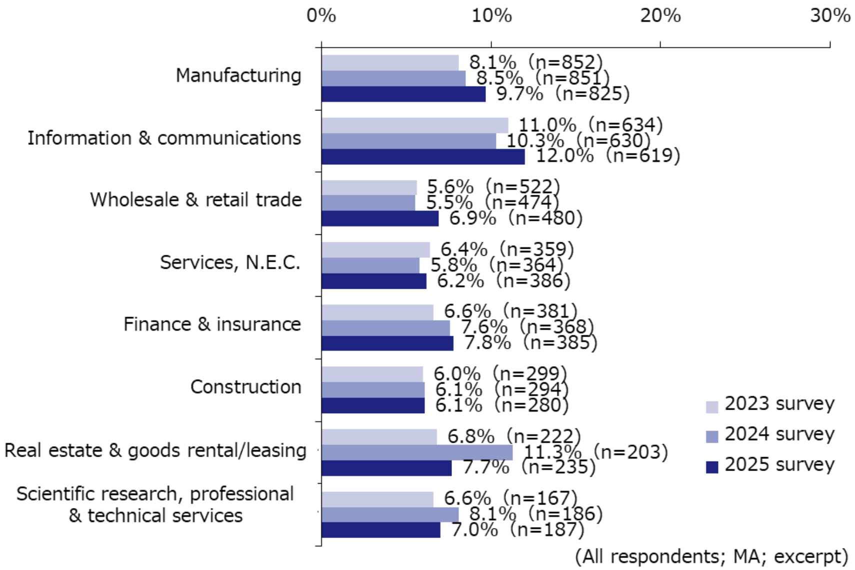


Figure 9: Implementation Rate of Working from a Satellite Office – By Sector

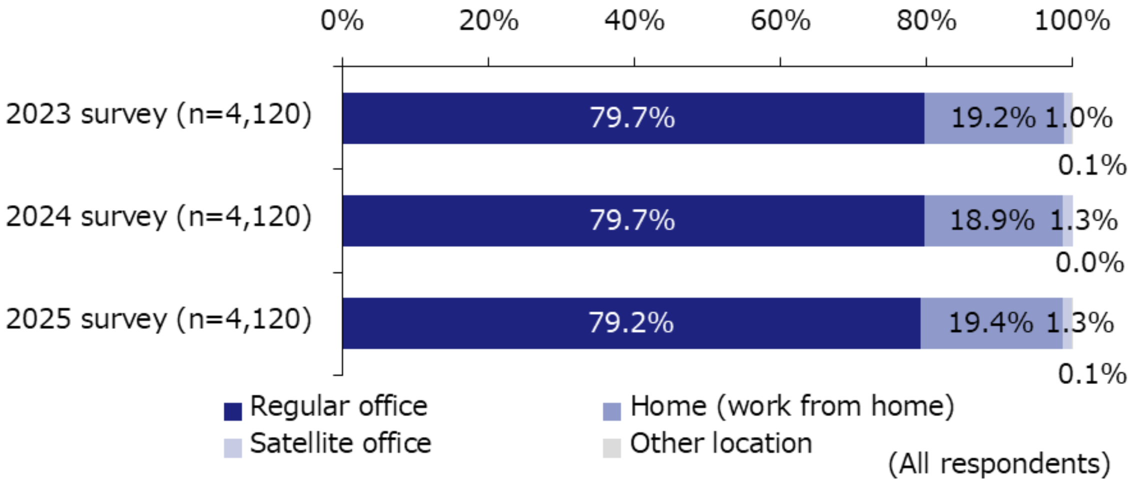


Proportion of time spent working at respondents' "regular office" remains at around 80%

Figure 10 shows the average allocation of time respondents spent at each place of work, i.e., their "regular office," "home (work from home)," "satellite office," and "other location."

Since the previous surveys, the proportion of time spent working at respondents' regular offices has remained at around 80%. Furthermore, the trend where a large majority of the time spent at places other than respondents' regular offices, i.e., teleworking, was spent at home (work from home) remains unchanged from previous surveys. Overall, there has been no significant change in workers' work styles since the 2023 survey.

Figure 10: Allocation of Time in Each Place of Work

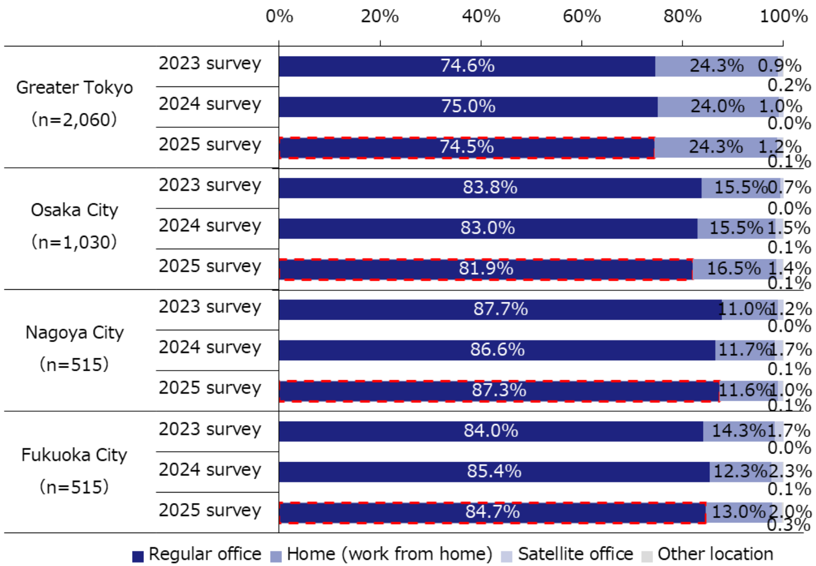


Workers in Greater Tokyo and in large companies spend more time teleworking

Looking at the results of Figure 10 by office location, the percentage of time spent working at respondents' "regular office" was 74.5% in Greater Tokyo and over 80% in other regions. Continuing from past surveys, the proportion of time spent working at respondents' "regular office" was slightly higher in regional cities than in Greater Tokyo.

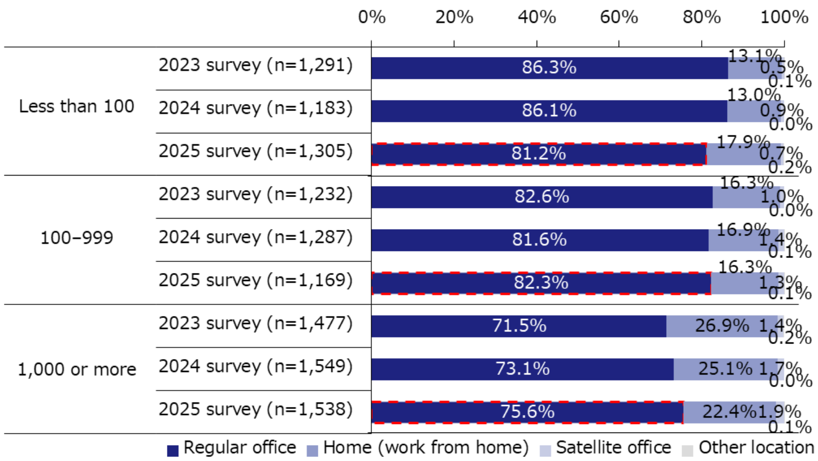
Similarly, when broken down by the size of the employer's workforce, workers employed by large companies show a slightly lower proportion of time spent working at their "regular office" (Figure 12). Work hours spent at the "regular office" show a slight decrease trend in small companies with less than 100 employees and a slight increase trend in large companies with 1,000 or more employees. This suggests that the return to the office may be beginning to influence the allocation of working hours in each place of work at large companies.

Figure 11: Allocation of Time in Each Place of Work – By Office Location



(All respondents)

Figure 12: Allocation of Time in Each Place of Work – By Size of Employer's Workforce



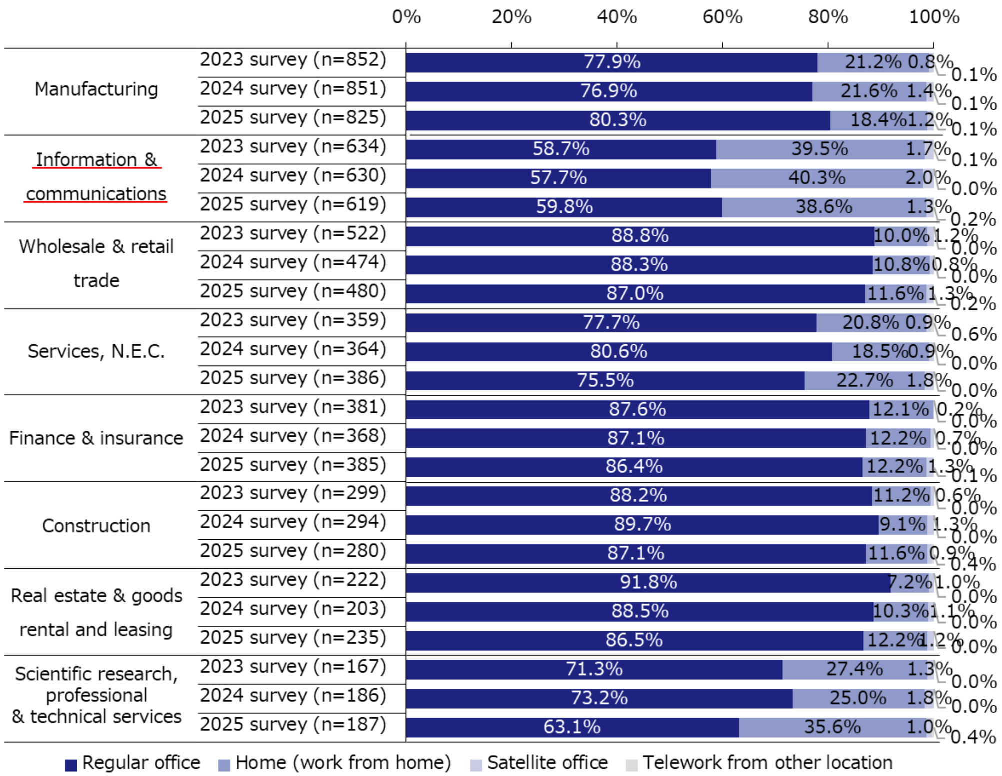
(All respondents; excerpt)

On average, workers in information & communications sector spend 40% of their time teleworking

Figure 13 shows the breakdown of the allocation of time in each place of work by sector.

Workers in the information & communications sector, who were confirmed in Figures 8 and 9 to have a high implementation rate of telework initiatives, spend an average of about 40% of their time teleworking. However, as with other sectors, most telework time is spent working from home.

Figure 13: Allocation of Time in Each Place of Work – By Sector



(All respondents; excerpt)

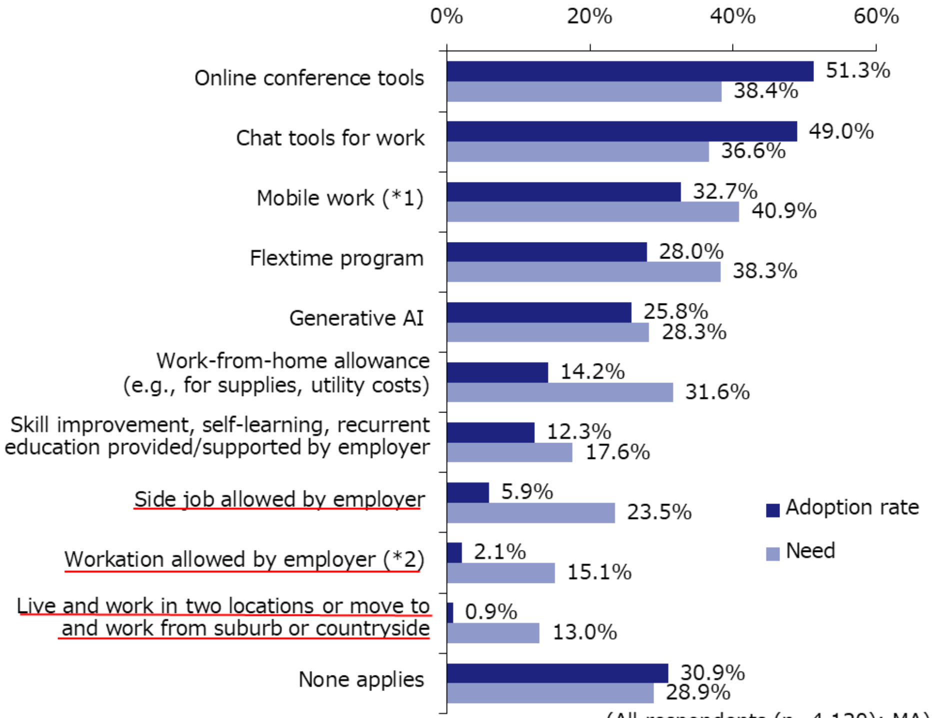
"Side jobs," "Workation," and "Living and working at two locations" currently have low adoption rates but high demand

We asked respondents about the work style initiatives they are currently using or implementing (adoption rate) and those they wish to use or implement in the future (needs) and compared the results (Figure 14).

In terms of the current adoption rate, "Online conference tools" (51.3%) ranked highest. This was followed by initiatives introduced alongside the implementation of telework, such as "Chat tools for work" (49.0%) and "Mobile work" (32.7%).

Relatively advanced initiatives such as "Side job allowed by employer," "Workation allowed by employer," and "Live and work in two locations or move to and work from suburb or countryside" showed a certain level of demand despite their current low adoption rates. Going forward, demand is likely to drive their increased implementation and adoption.

Figure 14: Adoption Rates and Needs for Work Style Initiatives



(All respondents (n=4,120); MA)

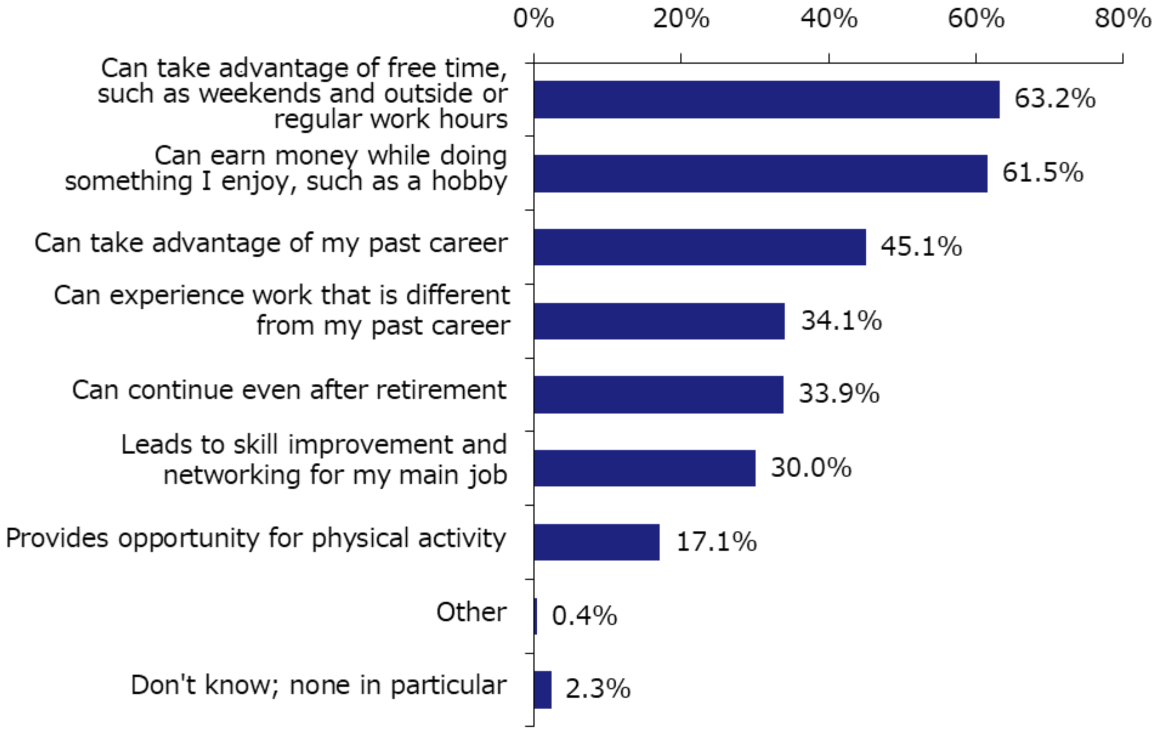
*1 Mobile work: A work style that allows workers to work outside of their designated office in a similar network environment to the office anytime, anywhere using a smartphone, mobile PC or other device.
*2 Workation: A portmanteau of working vacation, meaning to work from a travel destination, etc.

Popular side jobs: those that take advantage of workers' free time and those that allow them to earn money while doing something they enjoy (e.g., hobby)

We asked the workers who replied that they wanted to have a "side job allowed by employer" in the work style initiatives (see Figure 14) what type of side job they would like to have (Figure 15).

"Can take advantage of free time, such as weekends and outside or regular work hours" (63.2%) and "Can earn money while doing something I enjoy, such as a hobby" (61.5%) ranked high.

Figure 15: Preferred Type of Side Job



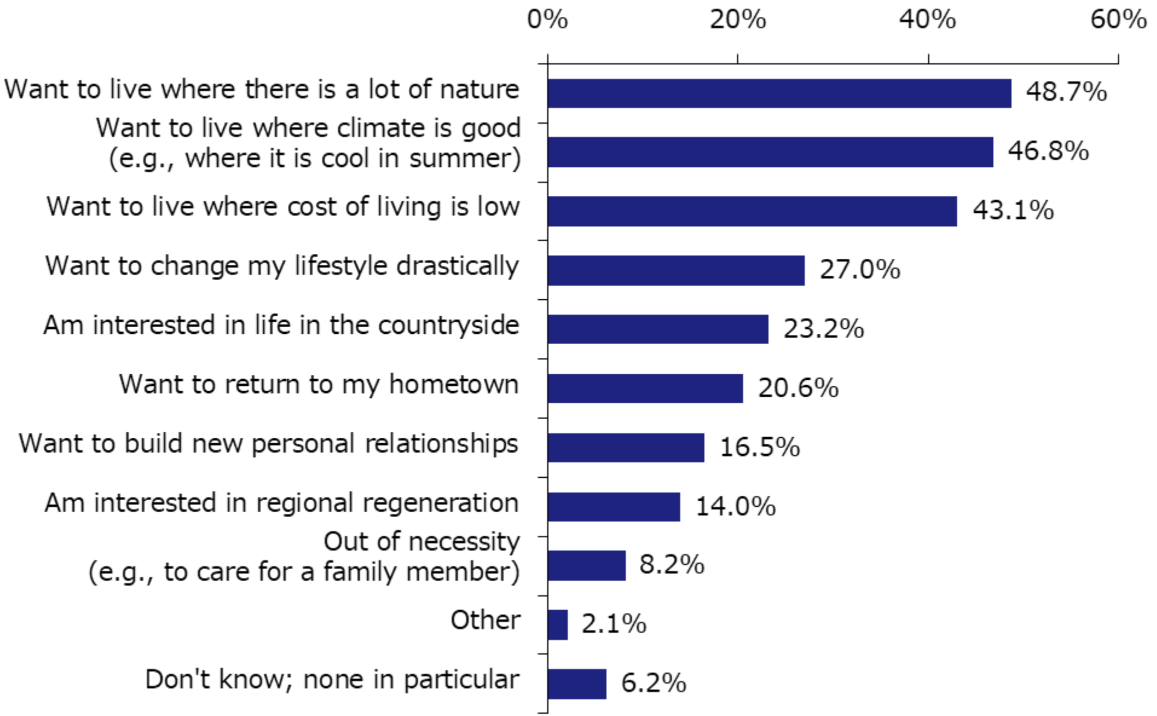
(Workers who replied that they want to have a 'side job allowed by employer' (n=967); MA)

Workers expect improved living environments (natural beauty, climate, economic conditions) from living and working in two locations or relocating

We asked the workers who replied that they want to “live and work in two locations or relocate to and work from suburb or countryside” in the work style initiatives (see Figure 14) the reason for wanting to do so (Figure 16).

The top responses were related to improved living environments, such as “Want to live where there is a lot of nature” (48.7%), “Want to live where climate is good (e.g., where it is cool in summer)” (46.8%), and “Want to live where cost of living is low” (43.1%).

Figure 16: Reason for Wanting to Live in Two Locations or Relocating to the Suburb or Countryside



(Workers who replied that they want to 'live and work in two locations or move to and work from suburb or countryside' (n=534); MA)

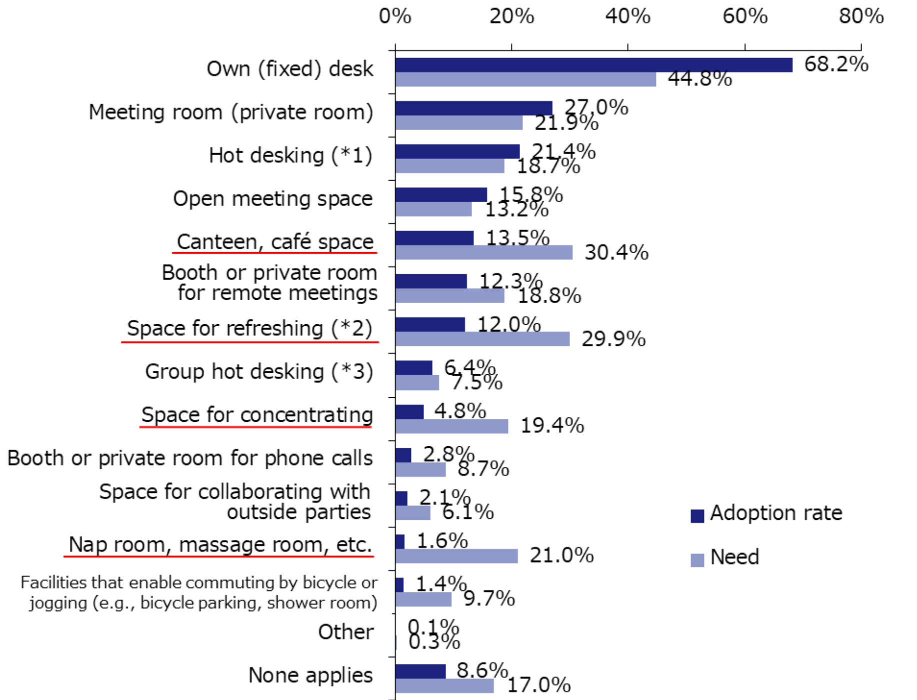
Workers require space for concentration or relaxation in the office

We asked respondents about the layout within their regular office that they currently use (adoption rate) and those they wish to have in the office in the future (need) (Figure 17).

The current adoption rate was highest for “Own (fixed) desk” at 68.2%, but the need remained at only 44.8%, indicating a preference for choosing work locations flexibly through telework and hot-desking.

Furthermore, the need for spaces such as “Canteen, café space,” “Space for refreshing,” “Space for concentrating,” and “Nap room, massage room, etc.” is high relative to current adoption rates. This underscores the need for office layouts that facilitate well-being and enable a clear switch between work and rest.

Figure 17:Adoption Rates and Needs of Office Layouts



(All respondents (n=4,120); 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 individuals can choose freely.

2. Values

1. The Ideal Work Style
2. Impact of Digital Transformation (DX) on Work

"Coming to office full time" is the majority current work style; ideal is "Hybrid work"

We asked respondents to choose the work style that most closely matched their ideal work style from three options: "Coming to office full time," "Hybrid work," and "Teleworking full time," and compared this to their current work style (see Figure 1) (Figure 18).

While "Coming to office full time" was the majority choice for current work styles, "Hybrid work" (44.9%) surpassed "Coming to office full time" (40.8%) as the most preferred ideal work style. Additionally, about 10% of workers consider "teleworking full time" to be ideal.

We then plotted the ideal work style against the current work style and found that the current and ideal work styles matched for the majority of respondents–about 70-80%–in every group (Figure 19).

However, we also found that 27.1% of workers currently coming to the office full time would ideally want to telework (sum of "Hybrid work" and "Teleworking full time").

Figure 18: Current Work Style (Top) and Ideal Work Style (Bottom)

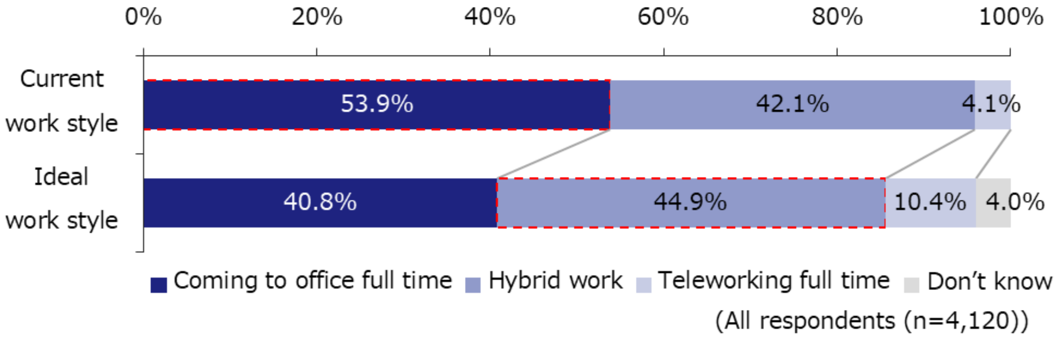
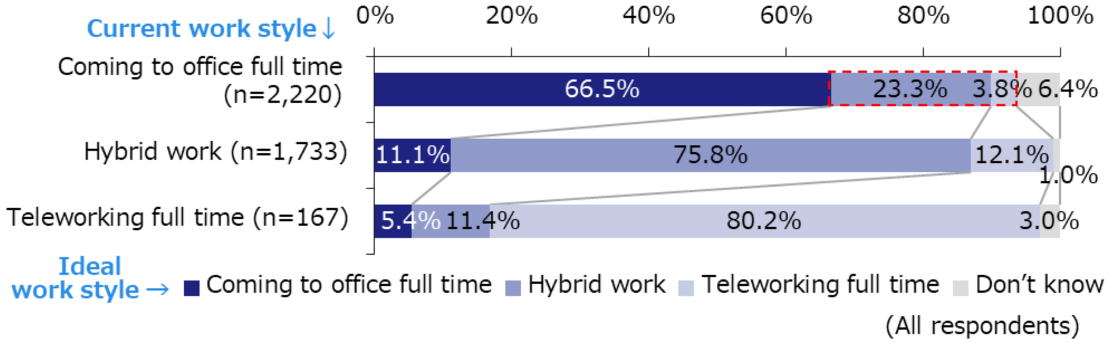


Figure 19: Ideal Work Style – By Current Work Style



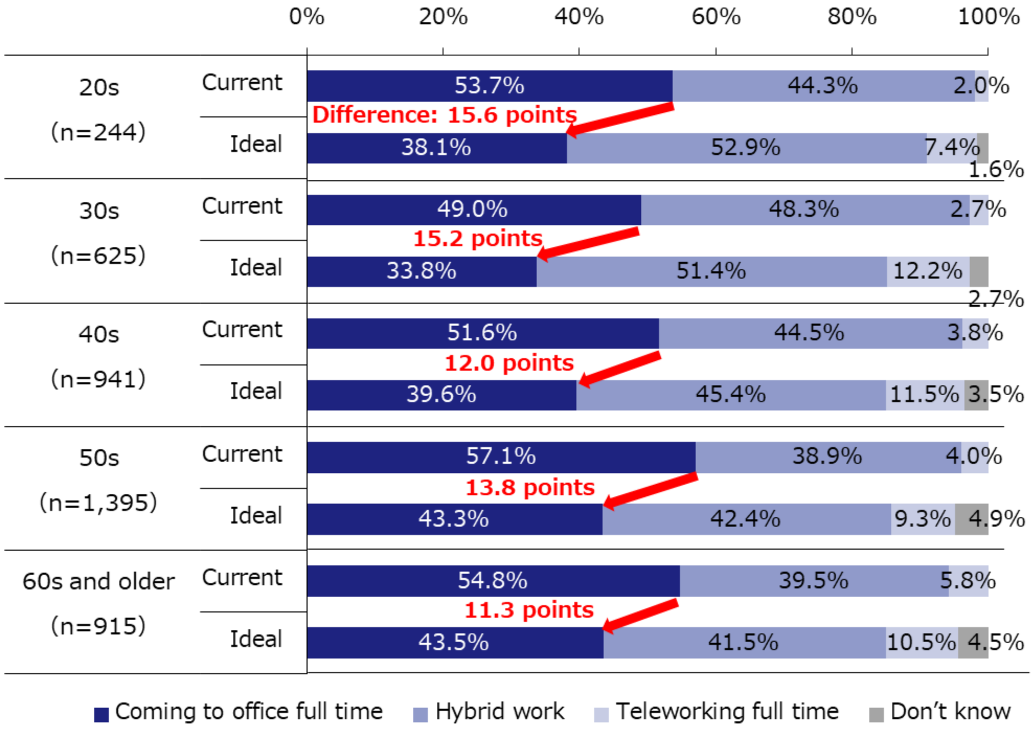
Regardless of age group, workers ideally want to telework more than they currently do

We compared respondents' current and ideal work styles (see Figure 18) by age group (Figure 20).

Across all age groups, the percentage of people who consider "hybrid work" or "teleworking full-time" ideal exceeds the percentage currently working in such arrangements, indicating strong demand for telework.

In particular, the percentage of "Coming to office full time" as an ideal among those in their 20s and 30s is more than 15 percentage points lower than the real situation, indicating a tendency to prefer flexible work styles like hybrid work or telework over fixed work patterns requiring daily commutes to the same office.

Figure 20: Current and Ideal Work Styles – By Age Group



(All respondents)

Majority of workers believe DX is "already affecting" work or "will probably affect in the future (somewhat)"

In recent years, advances in DX, including generative AI, have led to the mechanization and automation of certain desk work, raising the possibility that human jobs will change or be replaced.

Therefore, we asked whether respondents believe DX initiatives (such as utilizing generative AI and introducing robots) will affect or change their work in the present and over the next 2-3 years (Figure 21).

Although only 6.2% responded that DX is "already affecting" work, when combined with those who believe it "will probably affect in the future (somewhat)," we found that over half feel DX has or will have an impact.

Figure 22 compares these results based on whether or not generative AI is utilized (Figure 14). Among workers utilizing generative AI, 15.1% indicate that DX is "already affecting" work, with the percentage rising to as much as 74.3% when combining those who believe it will have an impact in the future (somewhat). This significantly exceeds the 42.2% among workers not utilizing it. We found that the more workers actually utilize DX technologies, the more strongly the impact and changes on work are recognized.

Figure 21: Impact of DX on Work

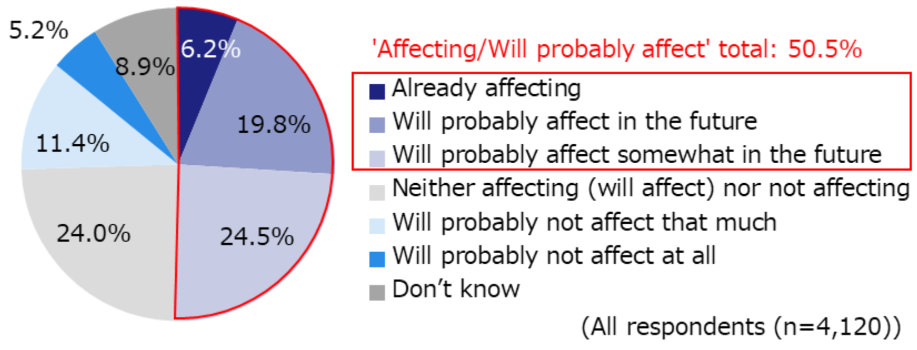
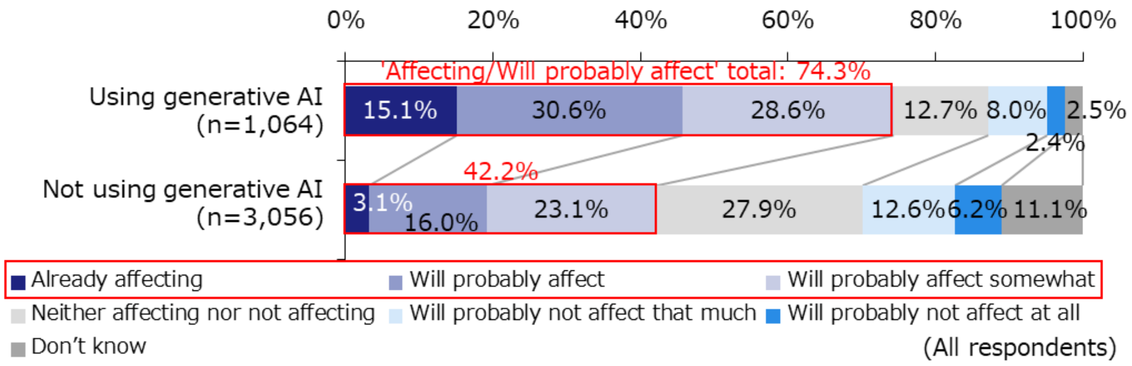


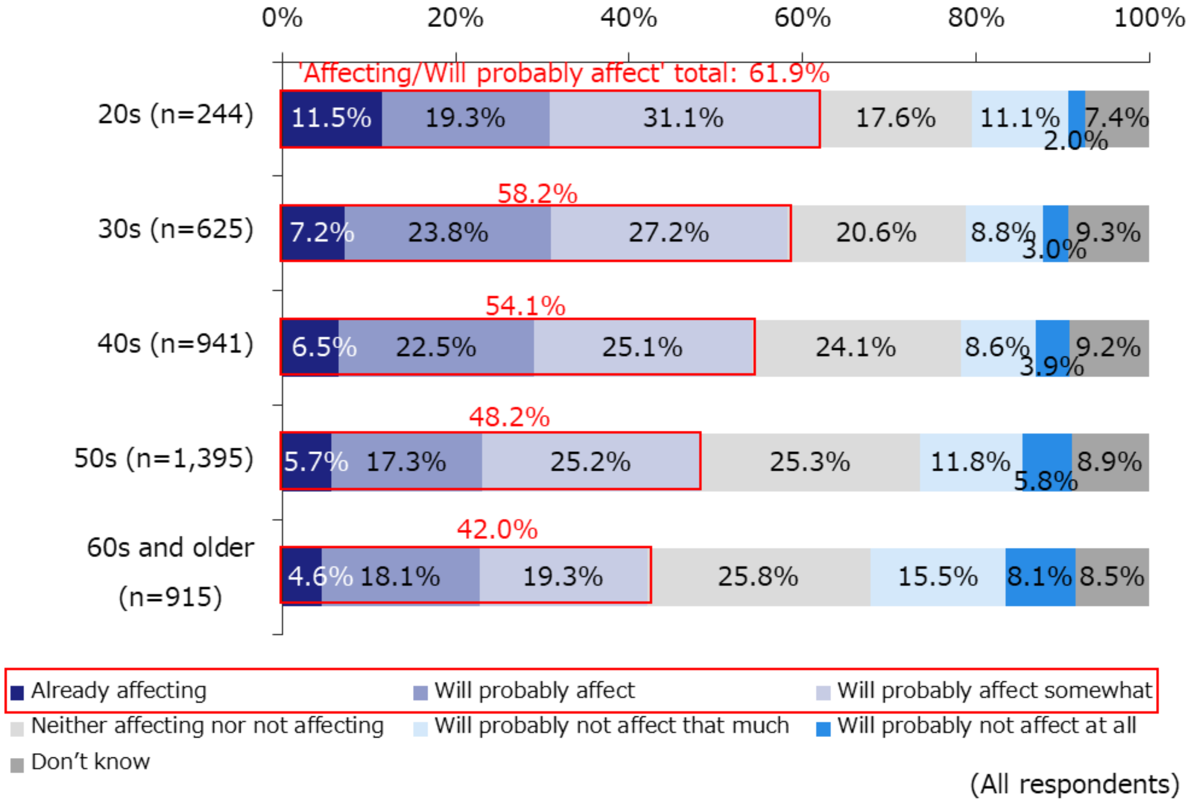
Figure 22: Impact of DX on Work – By Utilization of Generative AI



Younger workers feel the impact of DX on their work more strongly

When examining the results of Figure 21 by age group, the combined percentage of those in their 20s who responded "Already affecting" or "Will probably affect in the future (somewhat)" reached 61.9%, indicating that younger workers feel the impact of DX on their work more acutely (Figure 23).

Figure 23: Impact of DX on Work – By Age Group



Impact of DX on work (Responses to open-ended questions, excerpted, and edited)

We asked workers who responded in Figure 21 that DX is “already affecting” or “will probably affect in the future (somewhat)” about the specific impacts or changes. Below is a summary of the effects of advancing DX, along with concerns and issues, focusing on which business operations are impacted.

Operations affected

Many respondents indicated that the impact is or will be primarily felt in clerical work and simple tasks such as document preparation, text summarization, translation, research, data entry, and coding. There were also comments regarding brainstorming, simple design concepts, and the automation of reception and security.

Perceived/expected effects

There were many comments expressing expectations for improving the quality of work styles, including streamlining operations, reducing working hours, boosting productivity, eliminating reliance on specific individuals, and shifting toward creative tasks.

・“Unnecessary work has been reduced.”
・“A half-day's work will be done in 30 minutes.”
・“We will be able to handle operations with fewer staff than we have now.”
・“We're now able to handle things even without a team of veterans like before.”
・“We will be able to focus on creative work.”
・“The amount and nature of work performed by humans will change.”

Anxieties and issues

Various concerns were raised, including job displacement, the need for more advanced skills, handling AI outputs, declining originality and creativity, adapting to changing work, and communication gaps.

・“Designs and illustrations created using generative AI are on the rise, making professionals increasingly unnecessary.”
・“There is a risk that programmers may become less essential and lose their jobs.”
・“Routine tasks will decrease, and more creative work will be required.”
・“I have not been able to fully utilize generative AI, and the gap with those who are is widening."
・“It actually takes more time to verify whether the AI-generated answers are correct.”
・“Responsibility is unclear.”
・“As more people start relying on generative AI, originality may be lost.”
・“Tasks previously handled by new hires are beginning to be replaced by AI, necessitating a shift in how we train them.”
・“I feel a lack of communication.”

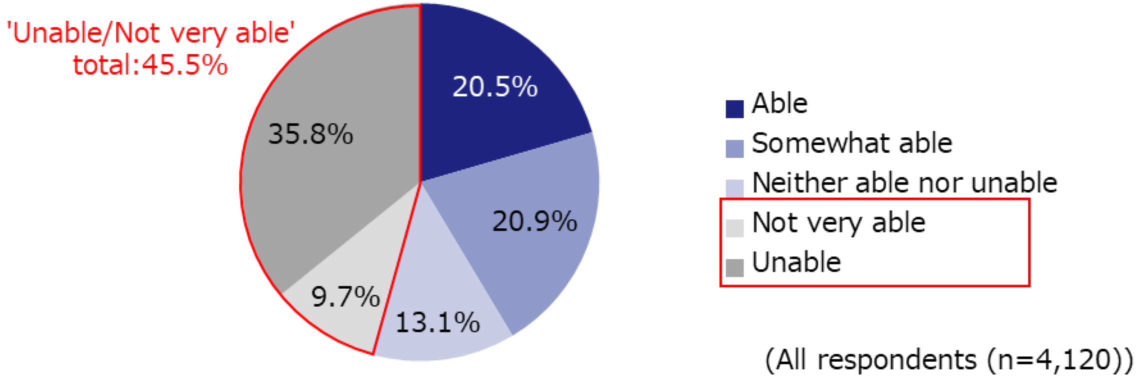
3. Evaluation and Needs

1. Ability to Choose Where to Work
2. Relationship between Work Environment and Engagement
3. Satisfaction with Work Style
4. Dissatisfaction and Issues with Current Work Style, Job Change Intentions
5. Office Needs

45.5% of workers cannot choose where to work

41.4% of the respondents said they are usually able to choose where to work (sum of “Able” and “Somewhat able”), a lower percentage than those who said they are unable to choose where to work (sum of “Unable” and “Not very able”: 45.5%) (Figure 24).

Figure 24: Ability to Choose Where to Work



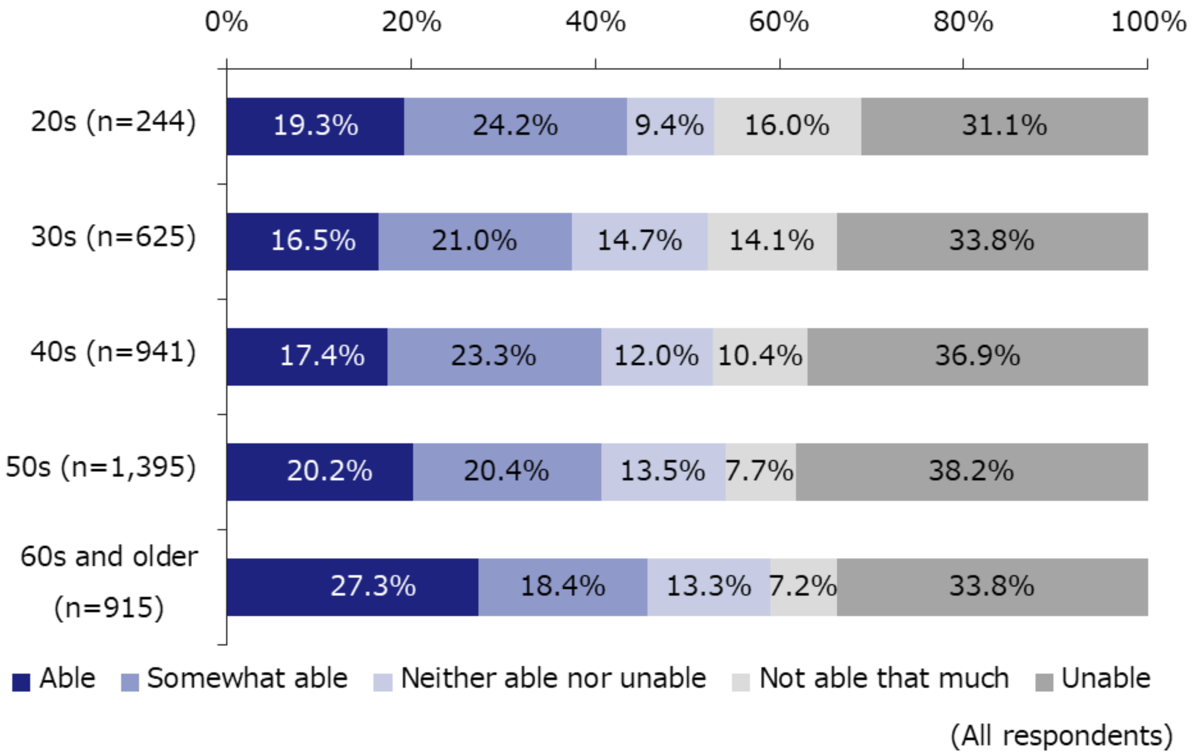
Regardless of age group, nearly half of workers are unable to choose where to work

Looking at the results of Figure 24 by age group, “Not very able/unable” exceeds “Somewhat able/able” in most age groups.

Only among workers aged 60 and over does “Somewhat able/able” (45.7%) exceed “Not very able/unable” (41.0%), but the difference is only about 5 percentage points.

Regardless of age group, nearly half of workers appear to be unable to choose where to work.

Figure 25: Ability to Choose Where to Work – By Age Group



Younger respondents are more likely to think that work environment affects engagement

When asked if the work environment (the office or teleworking location) affects engagement with their company or work, 69.2% of the workers said it affects (Figure 26).

A breakdown of this result by age group shows that the younger group was more likely to think that it does, with more than 80% of those in their 20s believing that it has an effect (Figure 27). Even among the lowest group, those aged 60 and over, a majority (62.3%) responded that it would have an impact.

Figure 26: Whether Work Environment Affects Engagement

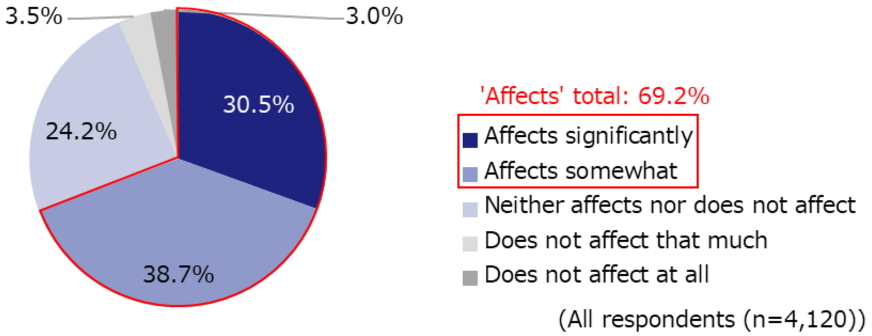
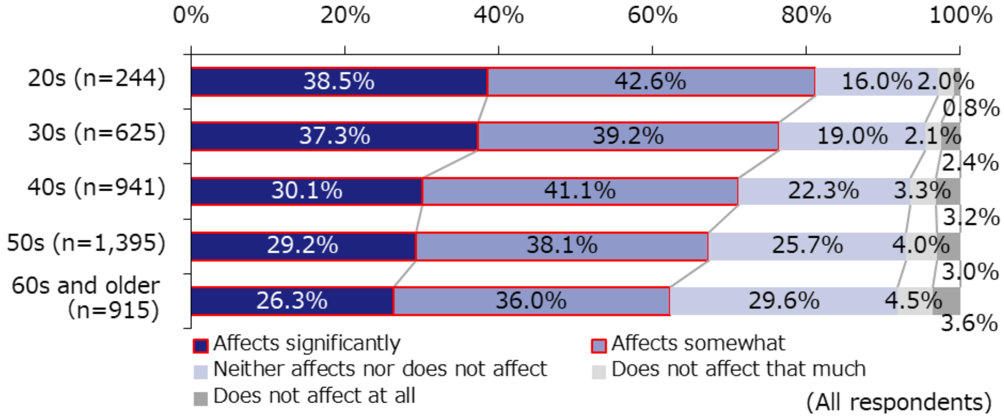


Figure 27: Whether Work Environment Affects Engagement – By Age Group



About half of workers are dissatisfied with their current work style. Satisfaction tends to be low especially among those in their 30s.

When we asked respondents how satisfied they were with their current work style, the percentage of those who said that they were "satisfied" (sum of "Very satisfied" and "Somewhat satisfied") was 50.1%, indicating that approximately half are dissatisfied (Figure 28).

Comparing these results by age group, workers in their 20s and those aged 60 and over show a majority expressing satisfaction, while the proportion of satisfied workers drops significantly among the intermediate age groups from their 30s to 50s (Figure 29). Among the intermediate age groups, the proportion of those in their 30s expressing dissatisfaction (the sum of "Very dissatisfied" and "Somewhat dissatisfied") is relatively high at 24.2%, suggesting they have the lowest overall satisfaction level.

Figure 28: Satisfaction with Work Style

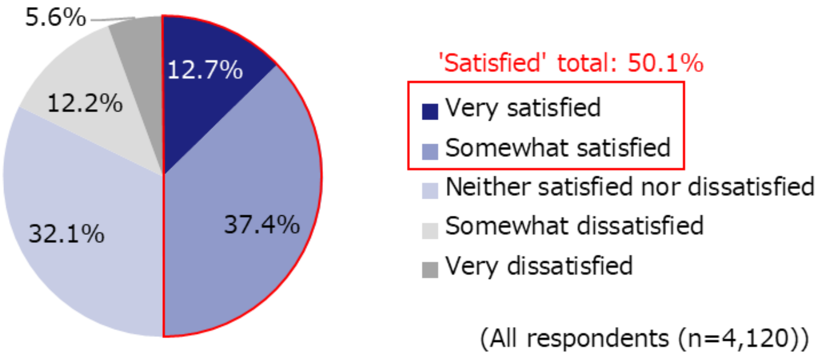
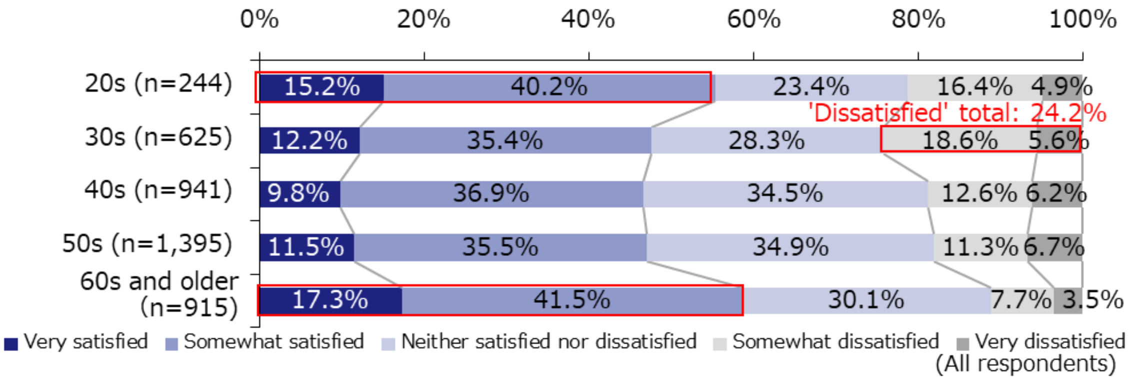


Figure 29: Satisfaction with Work Style – By Age Group



Reason for rating of satisfaction with work style (Responses to open-ended questions, excerpted, and edited)

We asked respondents to explain their reasons for their satisfaction levels with work styles as shown in Figure 28. We have broadly categorized the factors influencing satisfaction into the following three main areas.

(1) Alignment with ideal work style

While the ideal balance between coming to the office and telework varies by individual, many comments expressed appreciation <u>for being able to work in their preferred style</u> regardless of age group.

・"Since I come to the office four days a week, I have no worries about insufficient communication, and having one work-from-home day per week alleviates the stress of commuting." (20s, very satisfied)

・"Since I have about two days of telework per week, the burden of commuting has decreased. It's also good that this has created a clear distinction: tasks that can be done remotely are handled remotely, while tasks requiring physical presence are done in the office." (30s, very satisfied)

・"I'm able to work a combination of work-from-home and coming to the office as I hoped." (40s, very satisfied)

・"I'm able to work from home at my ideal frequency." (50s, very satisfied)

・"Remote work once a week strikes a good balance." (60s and older, very satisfied)

(2) Freedom and flexibility of choice

Many people recognize that <u>both coming to the office and teleworking have their respective advantages and disadvantages</u>. The comments suggest the importance of <u>being able to choose the appropriate work style depending on the situation</u>.

・"It's important to come to the office and work while communicating with team members. It's also important to boost productivity by doing work that can be done from home while actually working from home." (20s, somewhat satisfied)

・"I'm allowed to work from home to make it easier to balance work with childcare. On the other hand, I sometimes feel the difficulties of remote work and a sense of isolation." (30s, somewhat satisfied)

・"While I find commuting somewhat painful, I believe coming to the office is more efficient for communication both inside and outside the company." (50s, somewhat satisfied)

(3) Work environment improvements and operational rules

The ease of working both in the office and remotely, along with the establishment of hybrid work operational rules, also impacts satisfaction levels. <u>Insufficient facilities and a lack of fairness or sense of satisfaction in operations will likely lead to dissatisfaction.</u>

・"Insufficient hot-desking, meeting rooms, and teleconference booths." (40s, somewhat dissatisfied)

・"No one is there when I come to the office." (40s, somewhat dissatisfied)

・"Although remote work is presumed, I'm forced to come to the office for no good reason." (50s, very dissatisfied)

・"I'd like an allowance because utility costs are a burden (when working from home)." (20s, neither satisfied nor dissatisfied)

・"I am not happy about the difference in the ability to work flexibly depending on the work ethic of one's supervisor." (30s, somewhat dissatisfied)

・"Telework offers high flexibility and is ideal, but I'd be even happier if coworking spaces or satellite offices could be utilized for a change of scenery and to maintain health." (50s, somewhat satisfied)

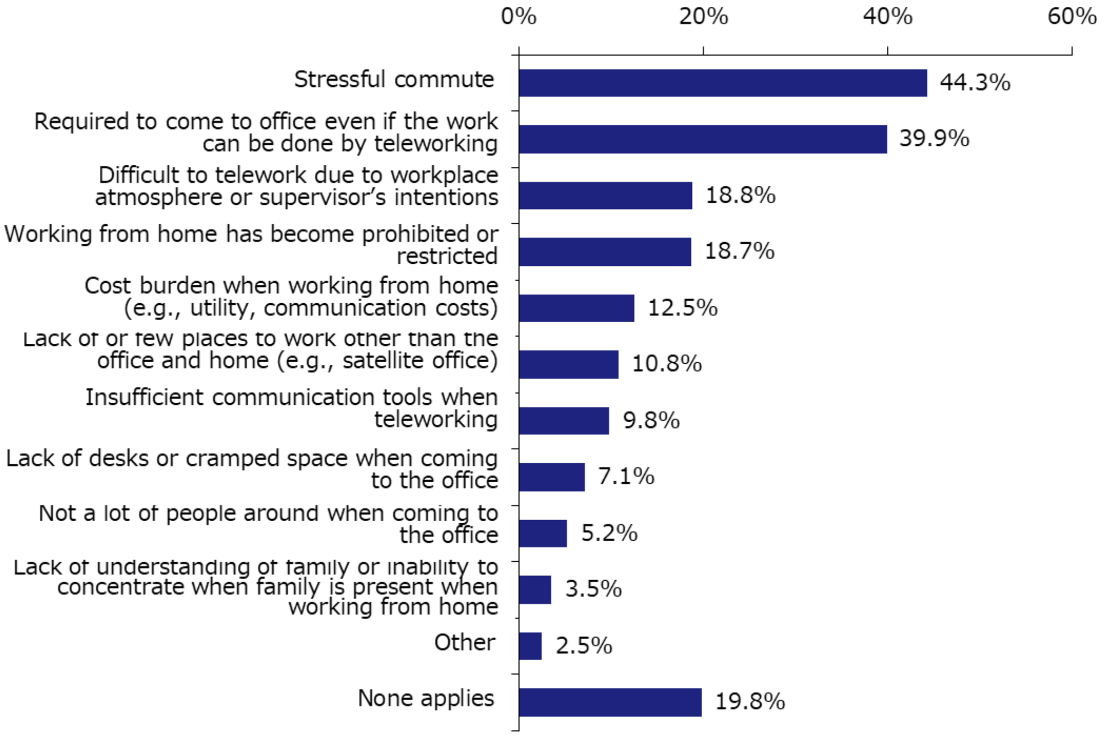
Workers are dissatisfied with “Stressful commute” and “Required to come to office even if the work can be done by teleworking”

When we asked the respondents who said in Figure 28 they were “(somewhat or very) dissatisfied” with their current work style about their specific dissatisfactions and issues, the top two responses–“Stressful commute” (44.3%) and “Required to come to office even if the work can be done by teleworking” (39.9%)–were by far the most popular answers (Figure 30).

These were followed by dissatisfaction with not being able to telework, such as “Difficult to telework due to workplace atmosphere or supervisor’s intentions” (18.8%) and “Working from home has become prohibited or restricted” (18.7%).

As telework becomes commonplace, forcing unnecessary commutes to the office is likely to directly fuel worker dissatisfaction.

Figure 30: Dissatisfaction or Issue with Current Work Style



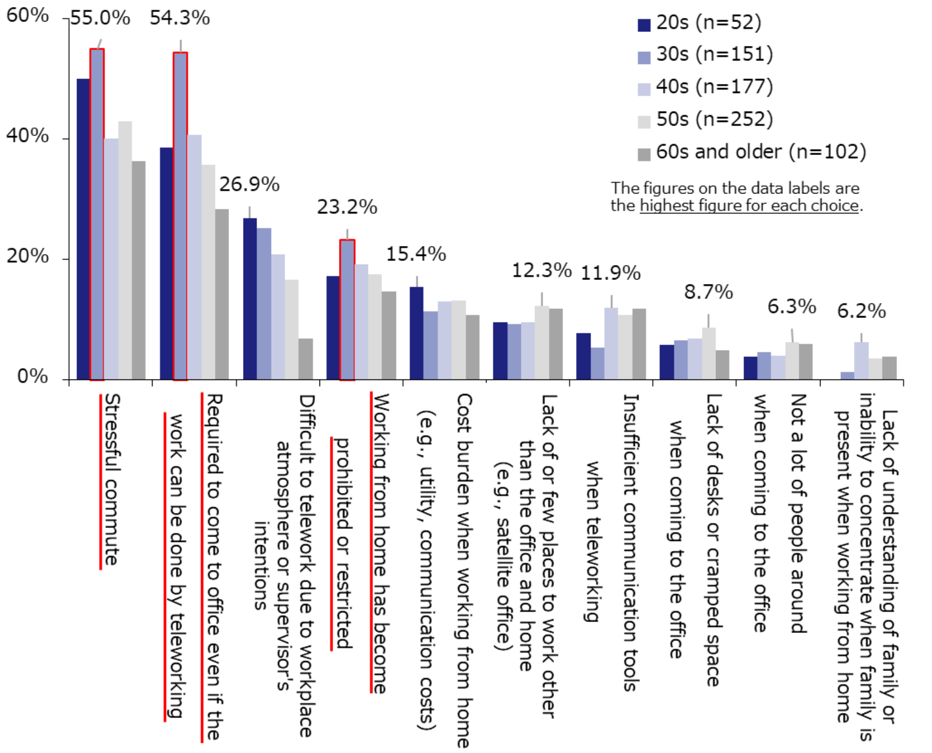
(Workers who are '(Somewhat or very) dissatisfied' with their current work style (n=734); MA)

Those in their 30s are especially dissatisfied with being required to come to the office even if the work can be done by teleworking

Looking at the results of Figure 30 by age group, those in their 30s showed higher levels of dissatisfaction or issues compared to other age groups regarding the following: “Required to come to the office even if the work can be done by teleworking” (54.3%), “Stressful commute” (55.0%), and “Working from home has become prohibited or restricted” (23.2%).

Those in their 30s often face heightened expectations at work while simultaneously needing to balance childcare and family responsibilities. This can make dissatisfaction and issues related to the inability to telework more apparent.

Figure 31: Dissatisfaction or Issue with Current Work Style – By Age Group



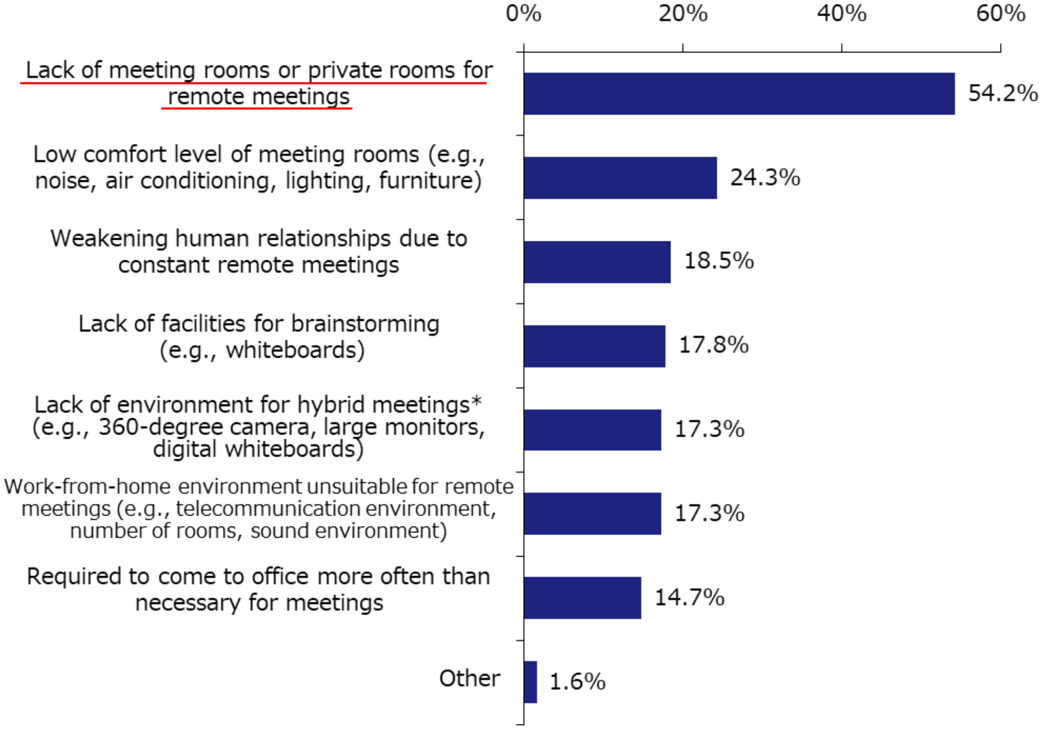
(Workers who are '(Somewhat or very) dissatisfied' with their current work style; MA; excerpt)

Top dissatisfaction regarding meetings: “Lack of meeting rooms or private rooms for remote meetings”

As hybrid work progresses, desirable ways of communication are being explored. We gathered feedback on dissatisfactions and issues regarding meetings. Figure 32 shows the aggregation results, excluding those who answered “None in particular.”

The most popular response was “Lack of meeting rooms or private rooms for remote meetings” (54.2%), which stood out as more than twice as popular as any other item.

Figure 32: Dissatisfaction and Issues Regarding Meetings



(Workers who have dissatisfactions or issues regarding meetings (n=1,726); MA)

*Hybrid meetings: Meetings with both in-person and remote participants

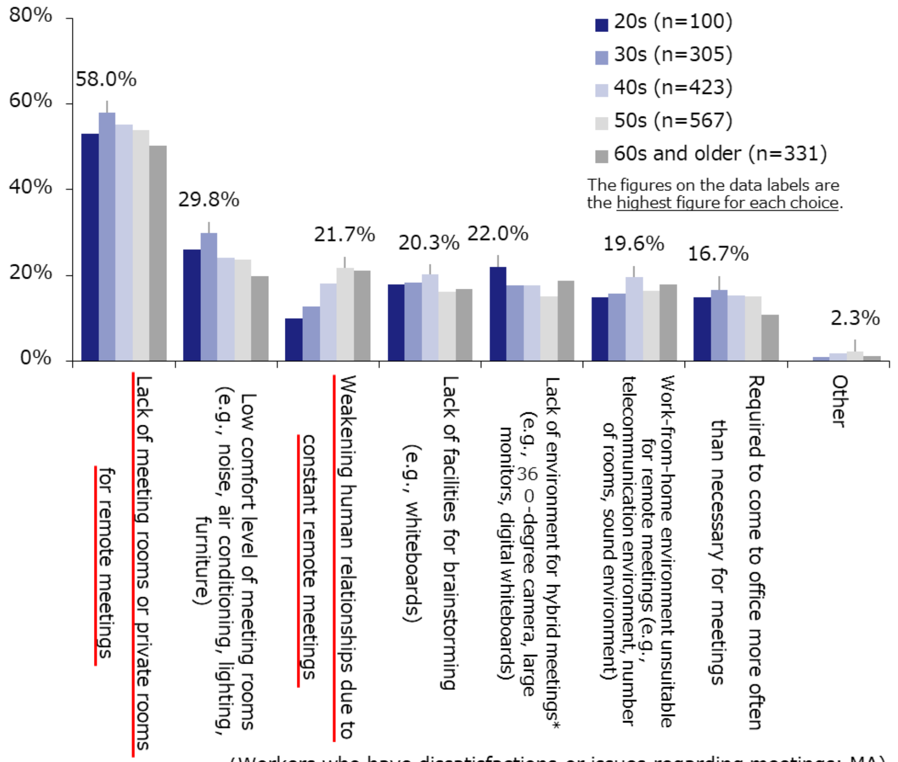
Top response regardless of age group: “Lack of meeting rooms or private rooms for remote meetings”

Figure 33 shows the results of Figure 32 broken down by age group.

Although there are slight differences, “Lack of meeting rooms or private rooms for remote meetings” ranked as the top dissatisfaction across all age groups.

Dissatisfaction about “Weakening human relationships due to constant remote meetings” tend to increase with age. Younger generations, accustomed to remote communication, may be less likely to feel the thinning of human relationships.

Figure 33: Dissatisfaction and Issues Regarding Meetings – By Age Group



(Workers who have dissatisfactions or issues regarding meetings; MA)

*Hybrid meetings: Meetings with both in-person and remote participants

30% of workers have intentions to change jobs, with younger workers showing particularly high intentions

When asked about their intentions to change jobs from their current employer, 30.3% of respondents expressed interest in doing so (Figure 34).

In terms of age group, younger respondents had higher percentages of intentions to change jobs, as high as 48.4% among those in their 20s and 44.8% among those in their 30s (Figure 35).

Figure 34: Intention to Change Jobs from Current Employer

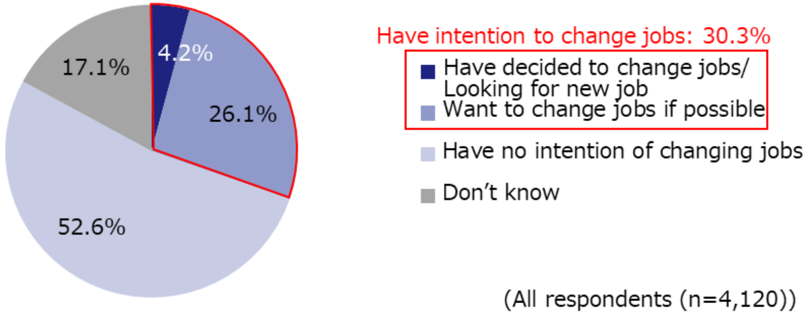
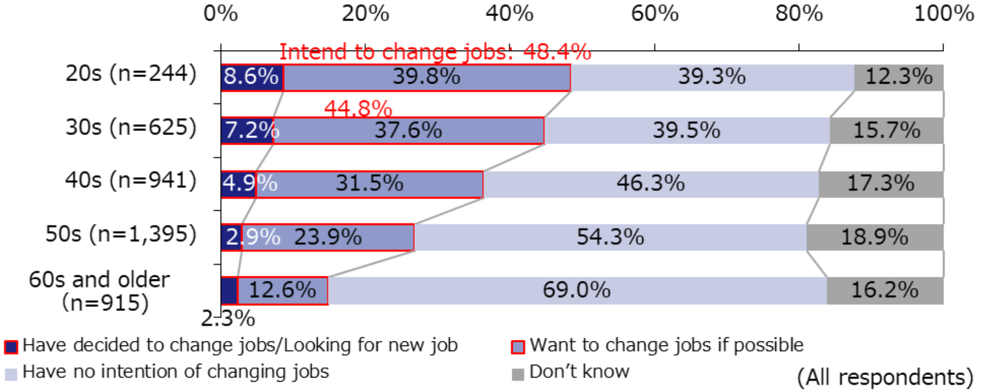


Figure 35: Intention to Change Jobs from Current Employer – By Age Group



Work facilities and the ability to concentrate on work are required in offices

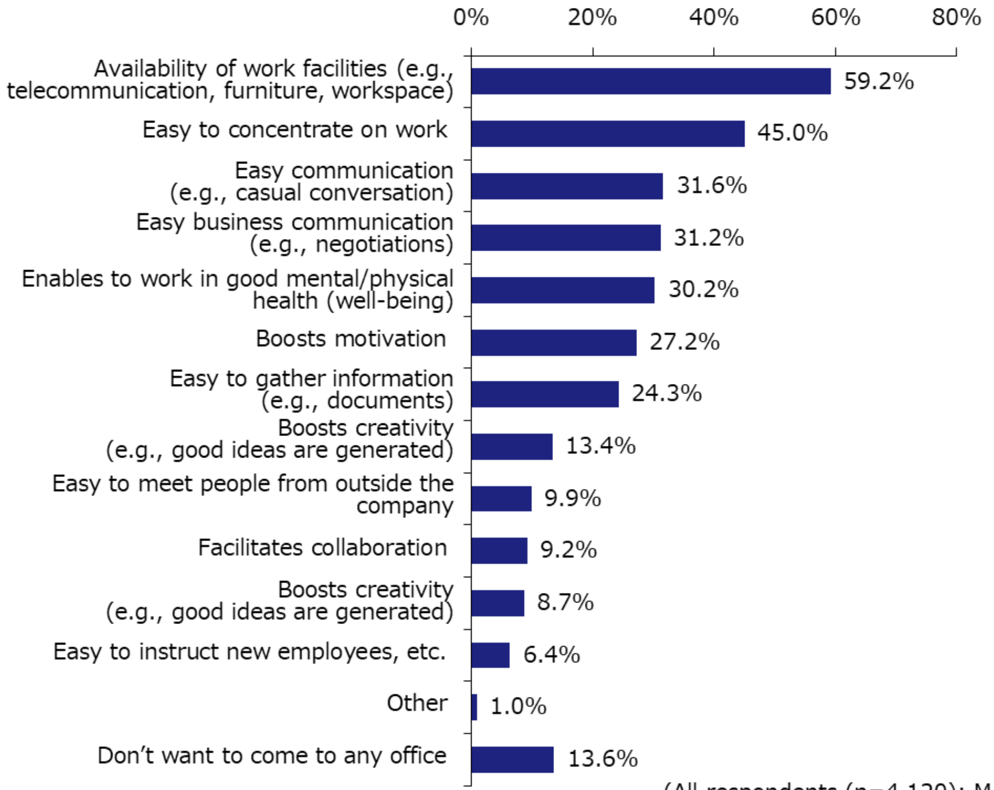
We asked respondents about the conditions of the office they would want to come to work in when they also had the option to telework (Figure 36).

The top responses were "Availability of work facilities (e.g., telecommunication, furniture, workspace)" (59.2%) and "Easy to concentrate on work" (45.0%), suggesting that workers place importance on functional comfort as a value required in an office.

Only 13.6% stated they "don't want to come to any office," indicating that a large majority of workers would be willing to come to the office if it met their needs.

If companies were to require workers to return to the office, they would be required to be aware of the work facilities and comfort when the workers come to the office and to create an office environment that makes workers want to come to the office voluntarily.

Figure 36: Desired Office Conditions



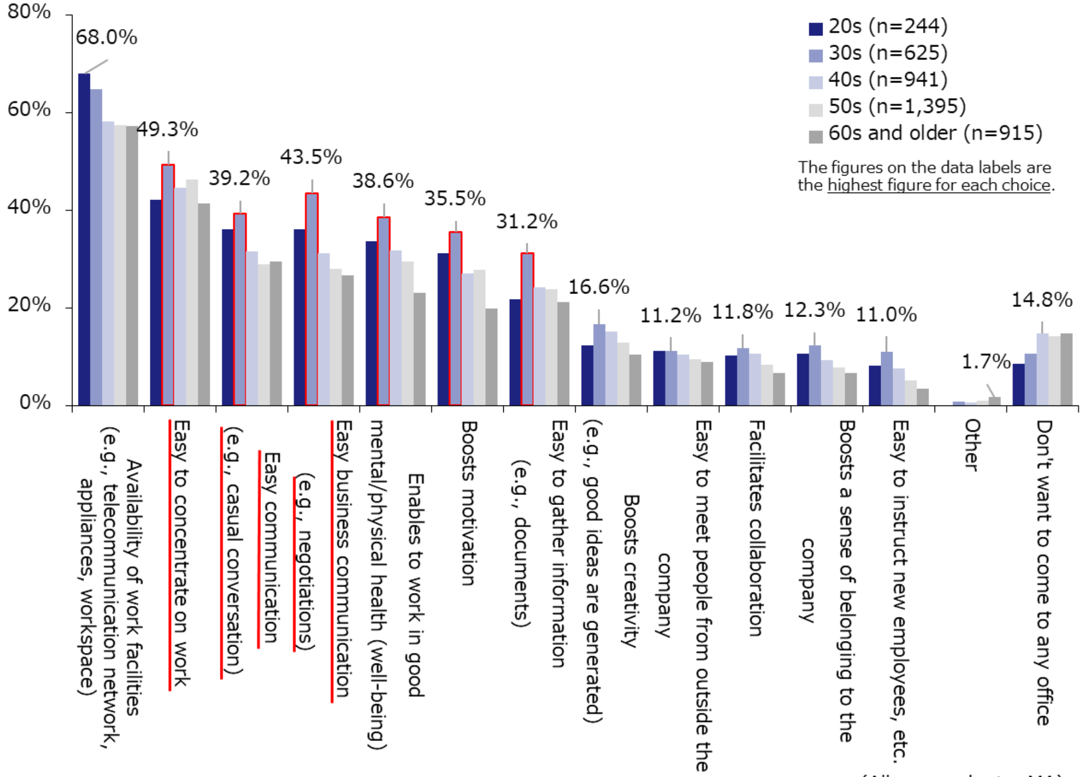
(All respondents (n=4,120); MA)

The needs of those in their 30s stand out in several areas, such as “Easy to concentrate on work”

Comparing the results of Figure 36 by age group revealed that the highest overall response, “Availability of work facilities (e.g., telecommunication, furniture, workspace),” was particularly desired by those in their 20s and 30s (Figure 37).

Additionally, in several conditions—such as “Easy to concentrate on work,” “Easy communication (e.g., casual conversation),” and “Easy business communication (e.g., negotiations)”—the needs of those in their 30s were higher than those of other age groups. As responsibilities and roles at work increase, and diverse communication with teams, superiors, and subordinates becomes necessary, those in that age group may have a strong desire to seek the optimal environment and features tailored to their job.

Figure 37: Desired Office Conditions – By Age Group



(All resopndents; MA)

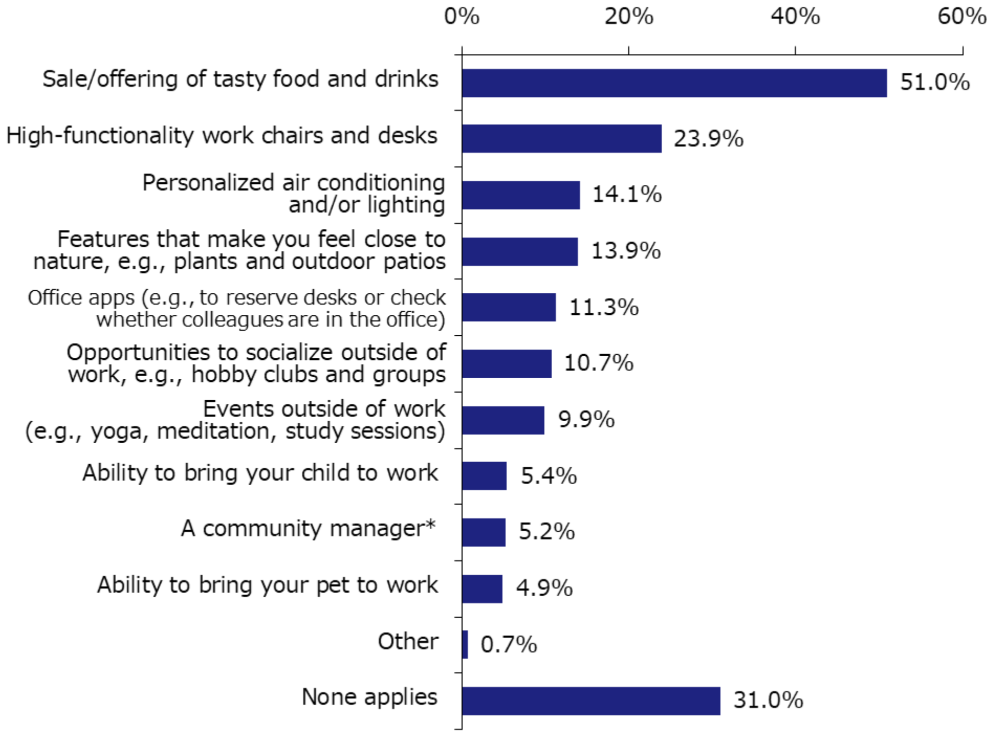
Most common need in office management initiatives is “Sale/offering of tasty food and drinks”

When we asked respondents what type of initiative they would like to see in a company’s office operations, the most popular answer was “Sale/offering of tasty food and drinks” (51.0%) (Figure 38).

This was followed by “High-functionality work chairs and desks” (23.9%) and “Personalized air conditioning and/or lighting” (14.1%), indicating strong needs for functional comfort.

By adopting such initiatives, companies may be able to enhance worker satisfaction.

Figure 38: Needs for Initiatives in Office Operations



(All respondents (n=4,120); MA)

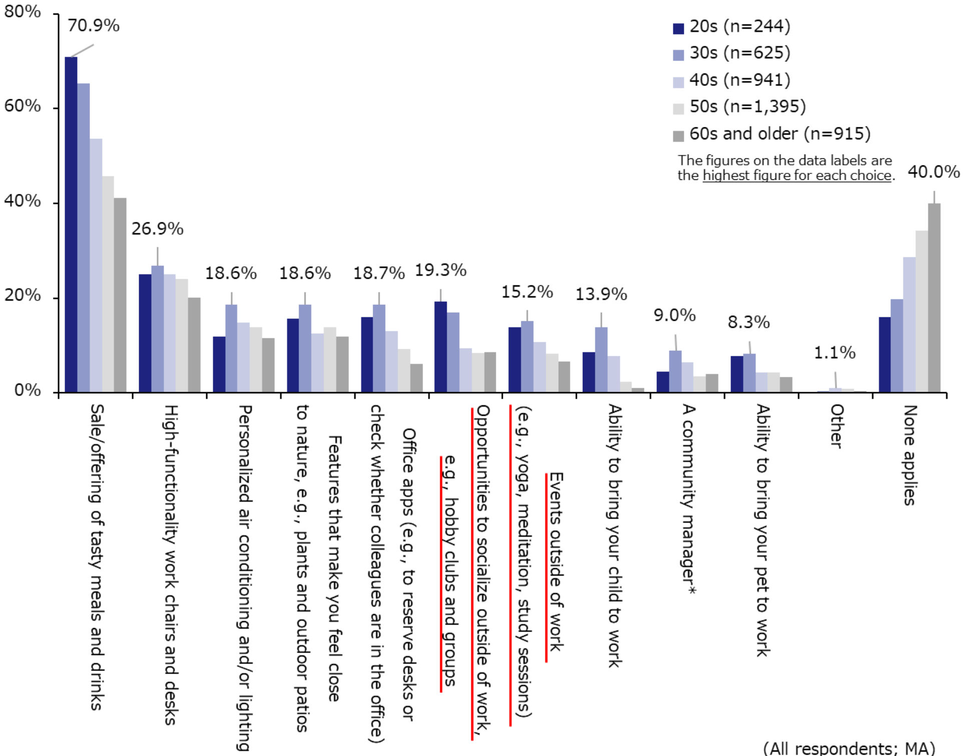
*Community manager: A person tasked with encouraging interaction among users and creating a community thorugh daily office operations and event planning.

In addition to "Sale/offering of tasty food and drinks," several other items are in high demand among younger workers

Looking at the results of Figure 38 by age group, the most popular answer overall—"Sale/offering of tasty food and drinks"—was more popular among younger age groups, exceeding 70% among those in their 20s (Figure 39).

Overall, there is a high demand among those in their 20s and 30s, indicating that they may place greater emphasis than other age groups on experiential value in the office, such as providing "Opportunities to socialize outside of work, e.g., hobby clubs and circles," and organizing "Events outside of work (e.g., yoga, meditation, study sessions).

Figure 39: Needs for Initiatives in Office Operations – By Age Group



(All respondents; MA)

*Community manager: A person tasked with encouraging interaction among users and creating a community thorugh daily office operations and event planning.