



Metropolitan Areas Office Worker Survey 2025 <Summary Report>

Capturing changes in workers' work styles and values

November 21, 2025

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. It has released the results of the 10th office worker survey, which was conducted in September 2025. This document is the **summary report**.

Main Findings

- When we asked about office attendance and teleworking, the proportion of "Coming to office full time" was 46.9% in Greater Tokyo and around 60% in regional cities. No significant changes were observed compared to past surveys (Figure 1).
- In Greater Tokyo, over 50% of respondents are "working from home," which is more than 10 percentage points higher than in regional cities (Figure 2-1). On the other hand, the proportion of respondents "working from a satellite office" shows little variation across regions.
- When asked about their ideal work style, the proportion of respondents in their 20s and 30s who preferred "coming to office full time" was more than 15 percentage points lower than their current work style, indicating a tendency among younger generations to favor flexible work styles (Figure 3).
- Regarding satisfaction with work styles, we found that approximately half of workers are dissatisfied with their current work styles (Figure 4-1). By age group, satisfaction is lowest overall among those in their 30s (Figure 4-2).
- Comparing dissatisfaction and issues with current work styles by age group, 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 (Figure 5).
- When 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, choices such as "Easy to concentrate on work," "Easy communication (e.g., casual conversation)," and "Easy business communicate (e.g., negotiations)" were rated higher by those in their 30s than other age groups (Figure 6).

<Survey Overview>

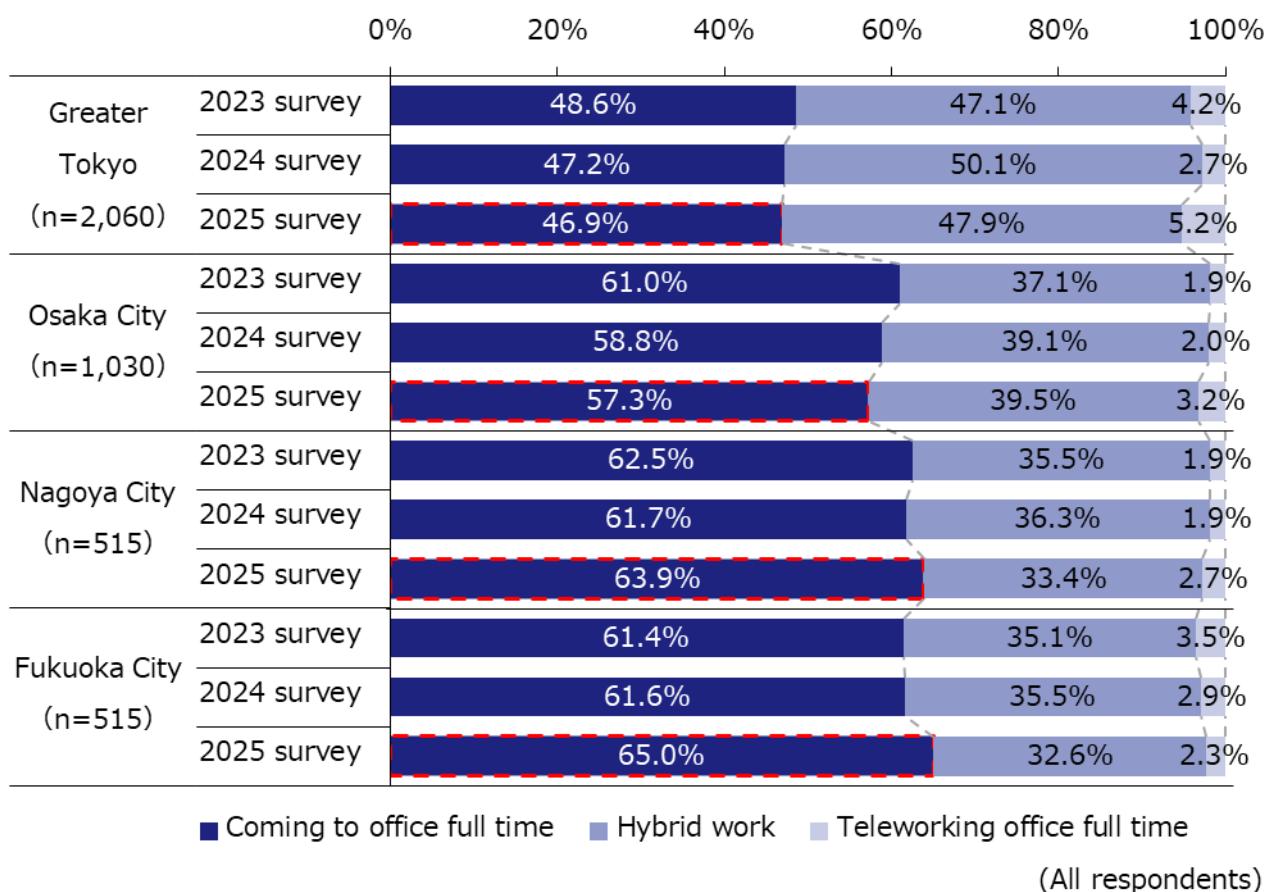
Survey period:	September 2025
Target respondents:	(1) Screening: Men and women aged 20 to 69 residing in the survey area whose occupation is business owner/executive, company employee, self-employed, or freelancer (2) Main survey: Screening survey respondents whose occupation is executive of company/organization, employee of company/organization, or self-employed (excluding shop owners), job category is managerial, specialized/technical, clerical, or sales, regular office location is Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures), Osaka City, Nagoya City, or 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 the office or 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

topic 1

Figure 1 shows the changes in the target respondents' work styles over time by office location, categorizing the work styles into three types: "Coming to office full time," "Hybrid work," and "Teleworking full time." In the 2025 survey, the proportion of "Coming to office full time" was 46.9% in the Greater Tokyo and around 60% in regional cities.

While some companies have announced policies to return employees to the office, no significant changes in work styles were observed in any region.

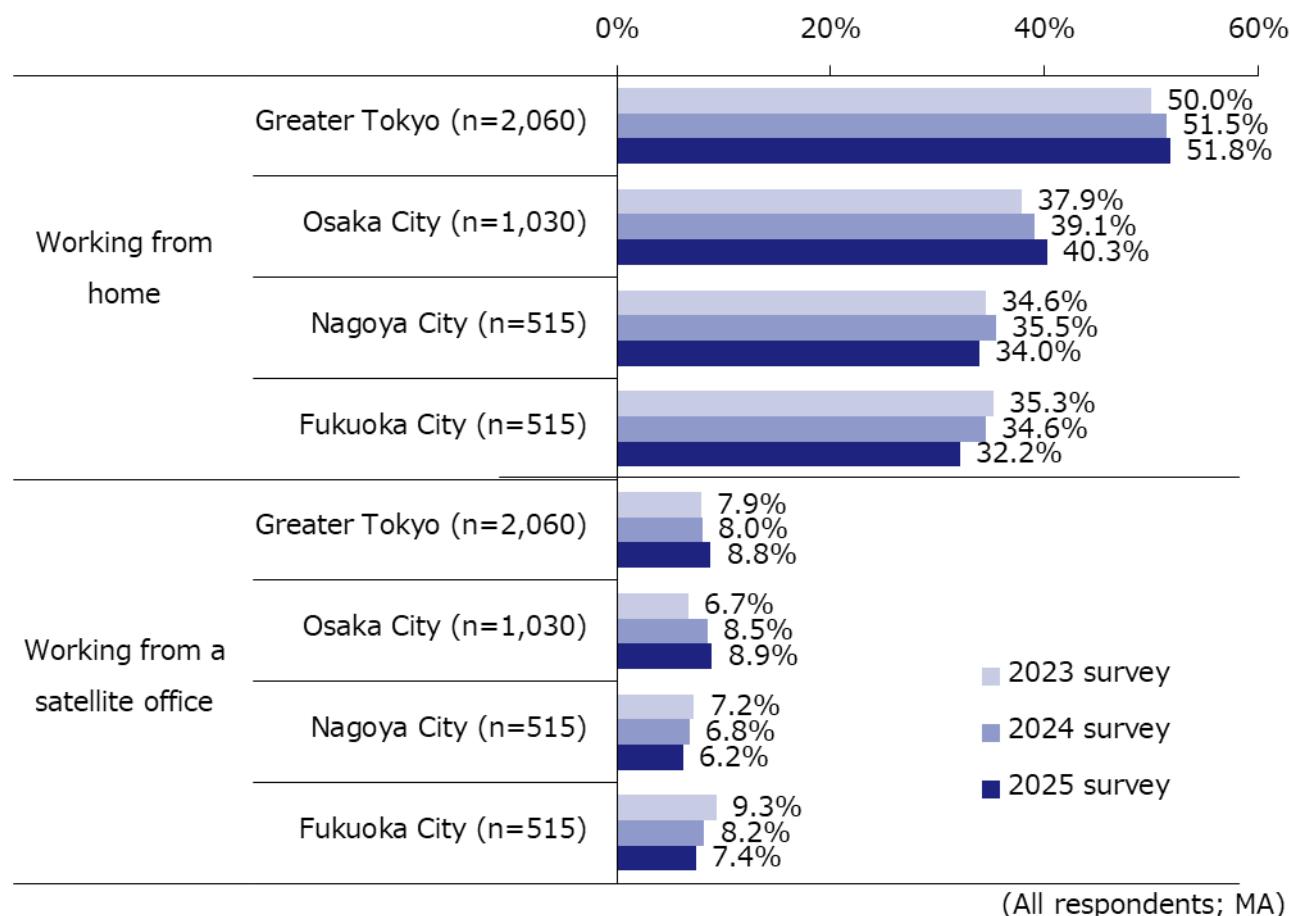
Figure 1: Coming to the Office or Teleworking – By Office Location



topic 2

In terms of "Working from home" and "Working from a satellite office" as telework measures, the percentage of respondents "Working from home" (51.8%) in Greater Tokyo was found to be more than 10 percentage points higher than in regional cities (Figure 2-1). 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.

**Figure 2-1: Implementation Rates of Work-From-Home Policies and Satellite Offices
- By Office Location**

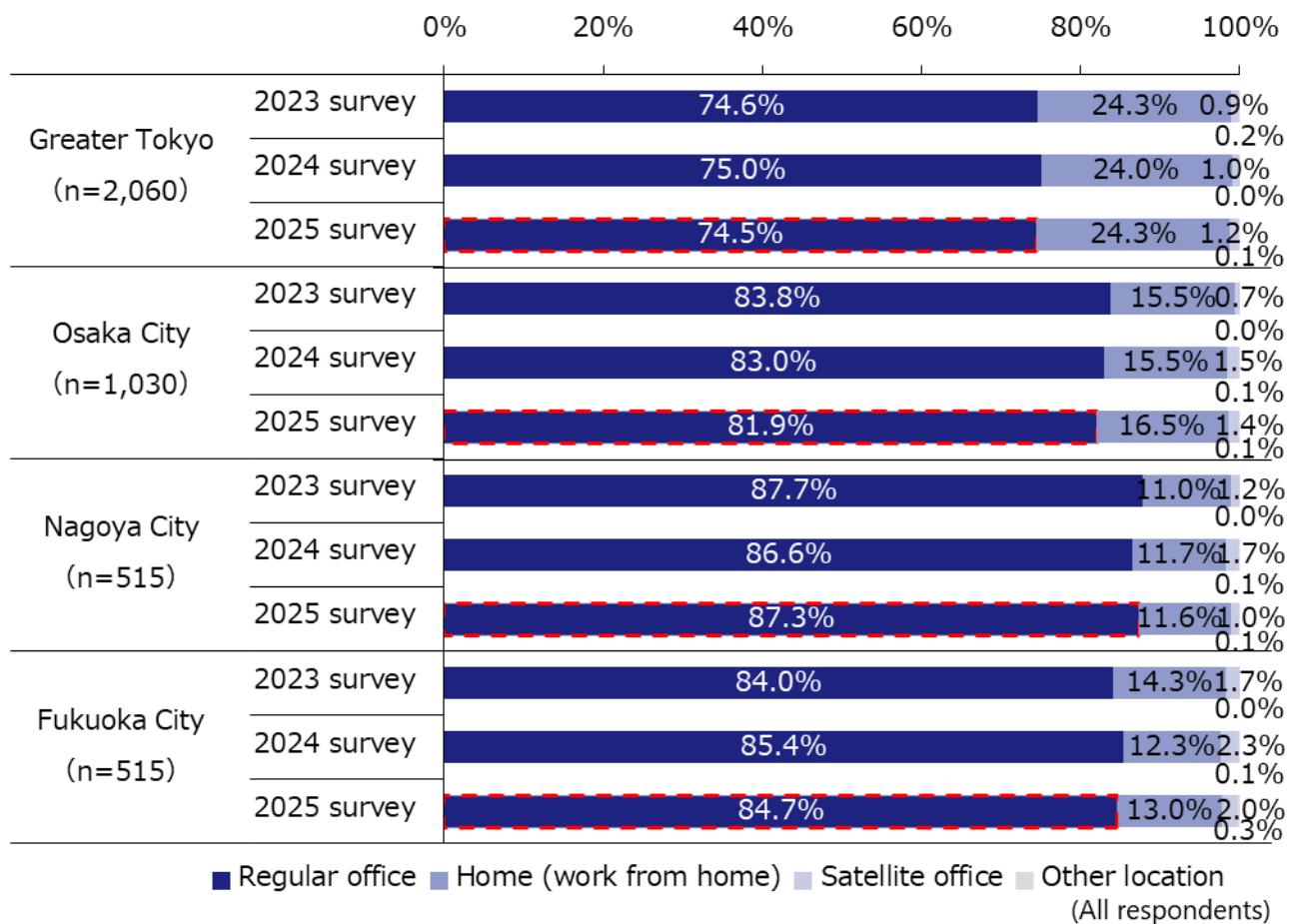


Furthermore, Figure 2-2 shows the average allocation of time respondents spent at each place of work, i.e., their "regular office," "home (work from home)," "satellite office," and "other location," for each office location.

In the 2025 survey, the proportion of time spent working at respondents' "regular office" was 74.5% in Greater Tokyo and over 80% in other regions. The result also shows that a large majority of the time spent working at places other than the respondents' regular office—that is, time spent teleworking—was spent working at home.

Over time, the distribution of time spent working in each location has remained largely unchanged, indicating no significant shift in workers' patterns since the 2023 survey.

Figure 2-2: Allocation of Time in Each Place of Work – By Office Location

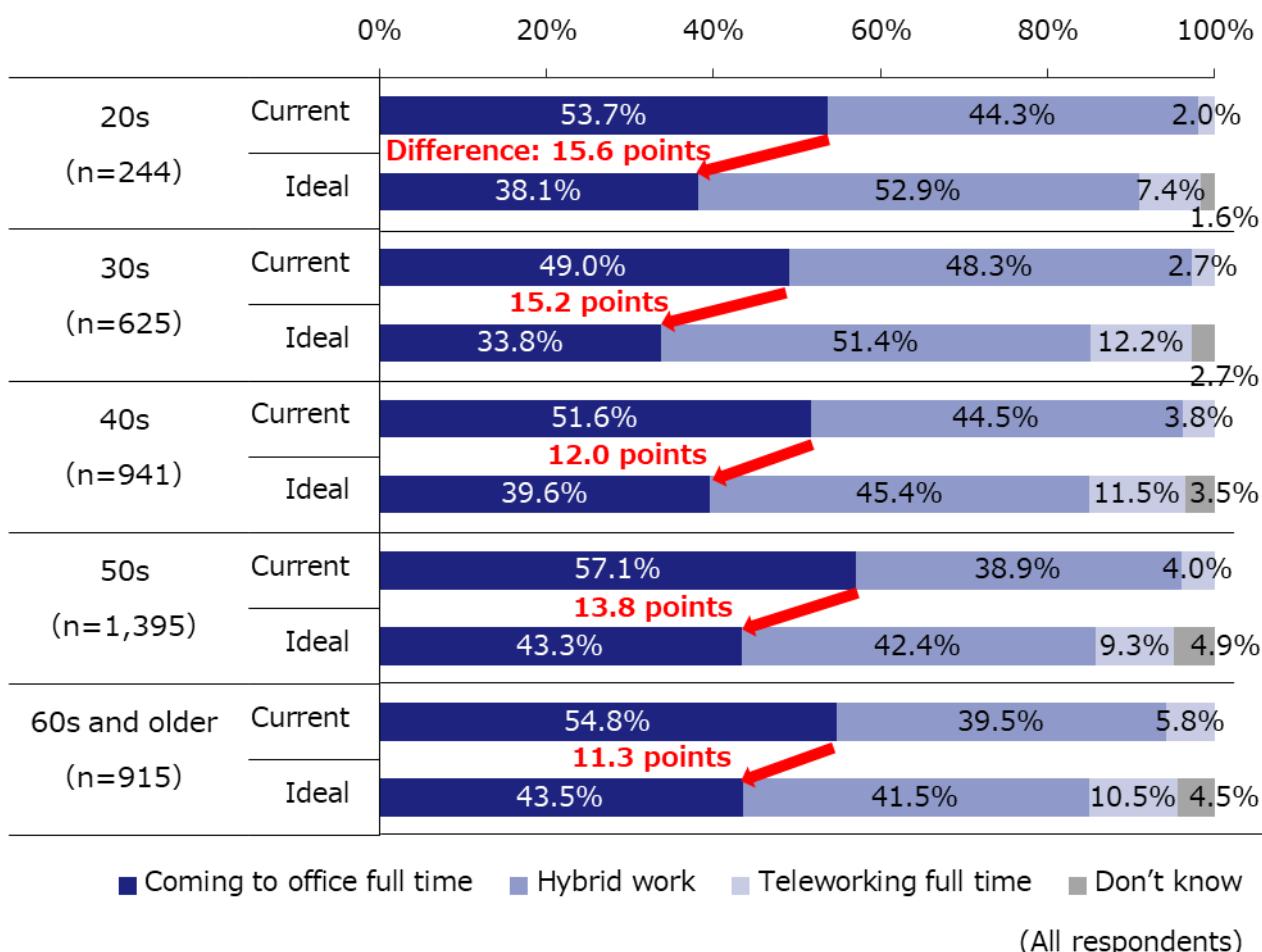


topic 3

Among the three work styles—"Coming to office full time," "Hybrid work," and "Teleworking full-time"—we asked respondents which style most closely aligns with their ideal and compared this with their current work style by age group (Figure 3).

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 3: Current and Ideal Work Styles – By Age Group



topic 4

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 4-1).

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 4-2). 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 4-1: Satisfaction with Work Style

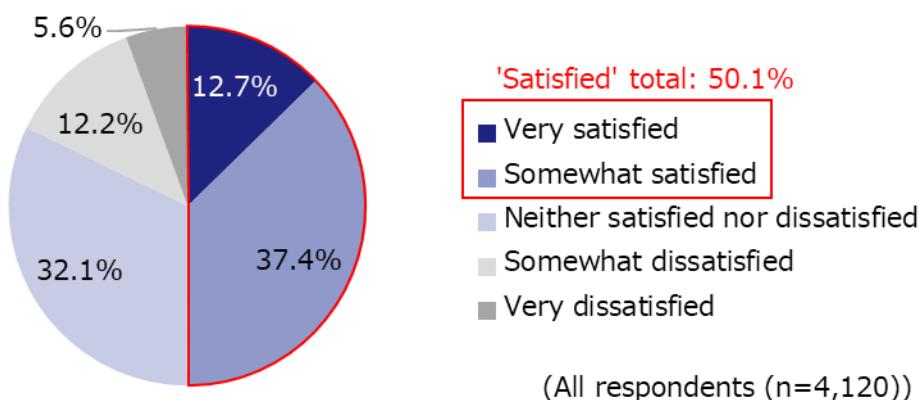
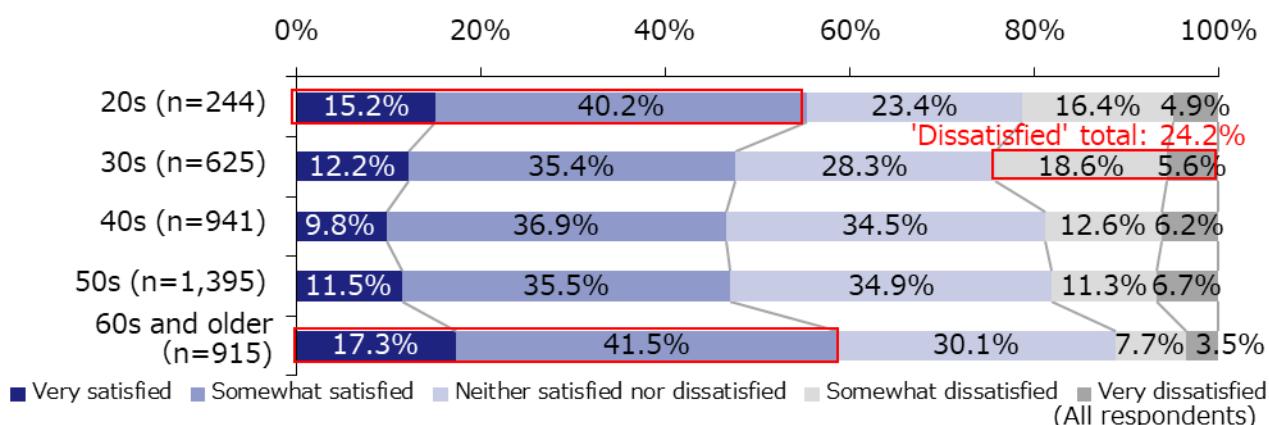


Figure 4-2: Satisfaction with Work Style – By Age Group



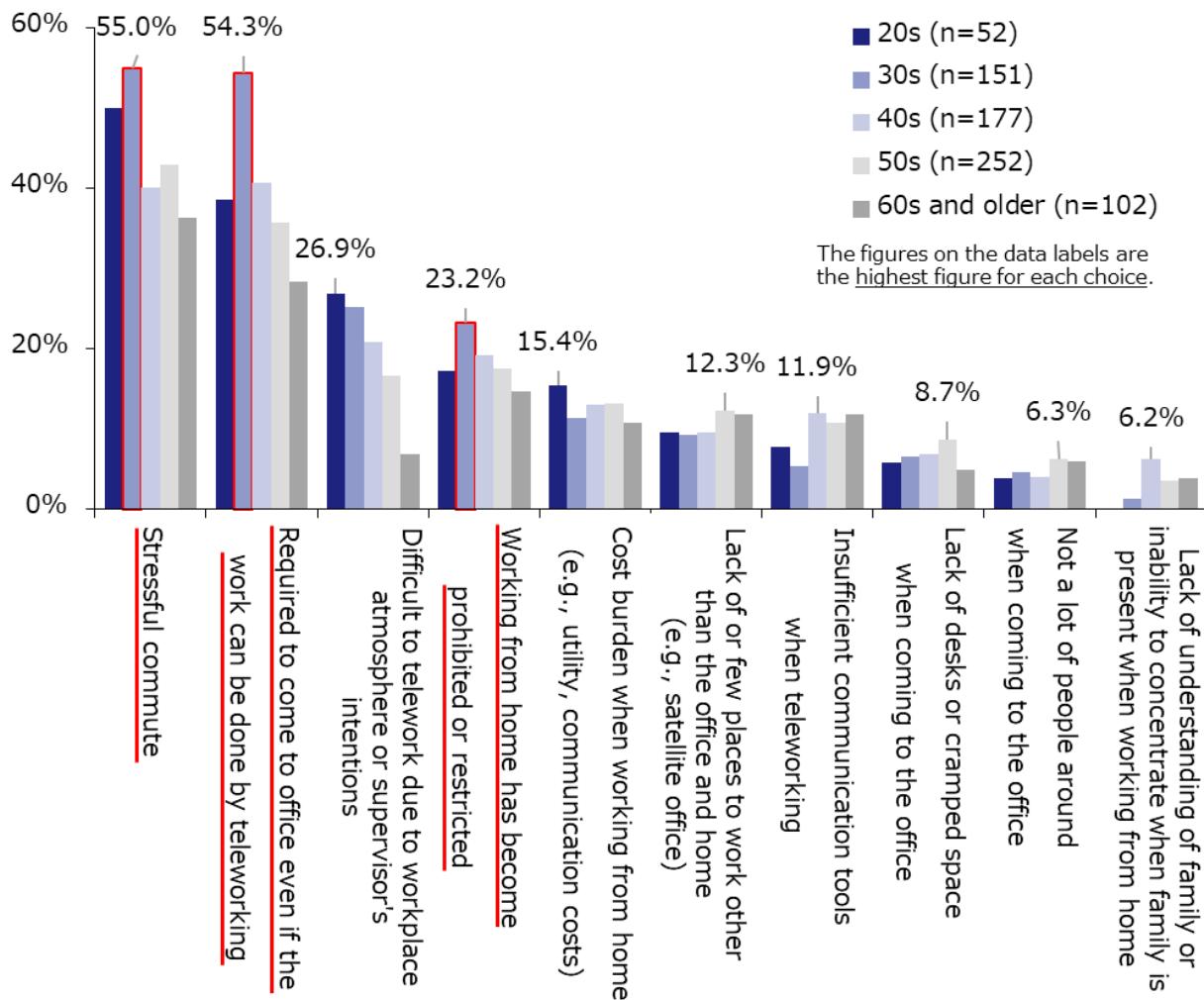
topic 5

Figure 5 shows the specific dissatisfactions and issues felt by workers who responded that they are "(somewhat/very) dissatisfied" with their current work style, broken down by age group. Compared to other age groups, those in their 30s reported higher levels of dissatisfaction or issues regarding:

- Being required to come to the office even if the work can be done by teleworking (54.3%)
- Stressful commute (55.0%)
- 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 5: Dissatisfaction or Issue with Current Work Style – By Age Group



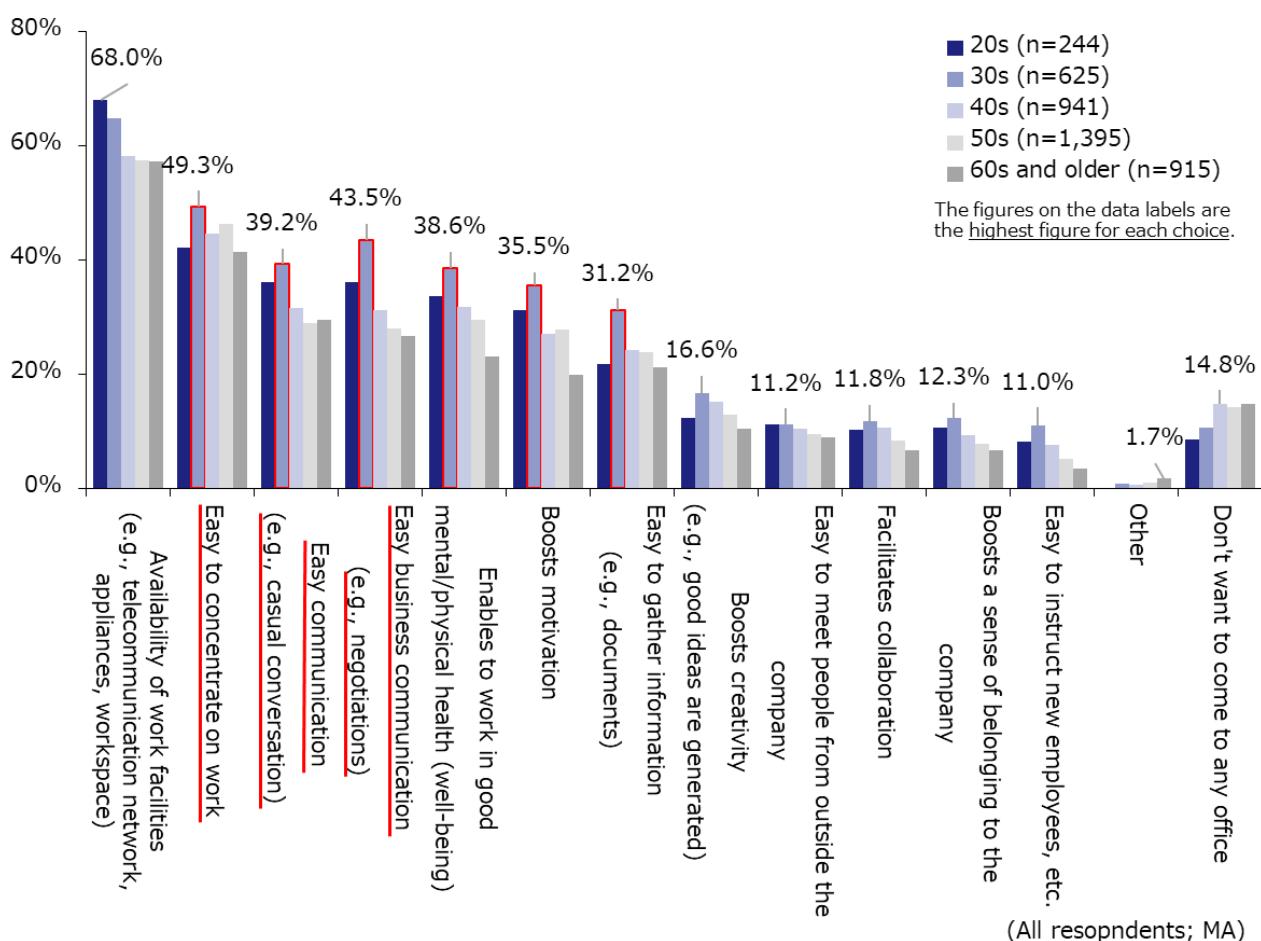
(Workers who are '(Somewhat or very) dissatisfied' with their current work style; MA; excerpt)

topic 6

We asked respondents what kind of office they would want to come to work at despite having telework options, and compared the responses by age group. As a result, the most popular condition overall—"Availability of work facilities (e.g., telecommunication, furniture, workspace)"—was particularly popular among respondents in their 20s and 30s (Figure 6).

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 6: Desired Office Conditions – By Age Group



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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