

Views of Future of Work by Age Group: Insights from the Office Worker Survey

Comparing the Impact of Digital Transformation and Interest in Non-Desk Work

To Solve the Labor Shortage Problem (Vol. 10)

December 8, 2025

1. Introduction

Driven by an awareness of the labor shortage problem, Xymax Research Institute has been releasing a series of reports entitled "To Solve the Labor Shortage Problem" since May 2023. In Volume 1*¹ and Volume 2,*² we broke down occupations into desk work and non-desk work, pointing out that the supply-demand gap of non-desk workers will widen in the future, i.e., that the core of the labor shortage problem lies in non-desk work.

The shortage of non-desk workers stems from structural and diverse issues such as population decline and aging. One potential solution involves desk workers, the demand for whom is expected to decline due to the adoption of generative AI, transitioning to non-desk roles. However, such a shift is not yet common among desk workers in Japanese companies, which have long maintained a lifetime employment culture.

Meanwhile, signs are beginning to emerge that the very nature of work itself—including non-desk work—is changing. In Volume 5,*³ based on a nationwide survey of office workers, we analyzed interest levels in non-desk work and the reasons behind it. We found that a significant number of people, particularly among younger generations, are already considering non-desk work as a realistic option aligned with societal change. Furthermore, in Volume 8,*⁴ titled *The Future of Work*, we predicted how these emerging changes would drive the evolution of non-desk work and pave the way toward resolving labor shortages.

In this report, we analyze the impact of digital transformation on jobs, interest in non-desk work, and work-related values and needs by age group, based on a survey*⁵ of 4,120 desk workers nationwide, providing further insights into the future of work. How do senior citizens, who are expected to become a new workforce in an aging society with declining birthrates, view work? What do the scarce young workers seek in their jobs? By exploring new trends in work and work styles emerging from individuals' evolving perspectives on work over time, we offer insights for addressing labor shortage issues.

*1 *To Solve the Labor Shortage Problem (Vol. 1) —The Actual State and Issues of Non-Desk Workers—* (May 31, 2023)
<https://soken.xymax.co.jp/report/upload/20230531.pdf>

*2 *To Solve the Labor Shortage Problem (Vol. 2) —How Much of a Shortage Will There Be for Non-Desk Workers?—* (December 1, 2023)
<https://soken.xymax.co.jp/report/upload/20231201-2.pdf>

*3 *Interest in Non-Desk Work as Shown in the Office Worker Awareness Survey —To Solve the Labor Shortage Problem (Vol. 5)—* (January 8, 2025)
https://soken.xymax.co.jp/report/upload/20250108_1.pdf

*4 *The Future of Work —To Solve the Labor Shortage Problem (Vol. 8)–* (June 19, 2025)
<https://soken.xymax.co.jp/report/upload/20250619.pdf>

*5 *Metropolitan Areas Office Worker Survey 2025* (November 21, 2025)
https://soken.xymax.co.jp/report/upload/20251121_Summary.pdf

2. Societal Changes and Awareness of the Future of Work

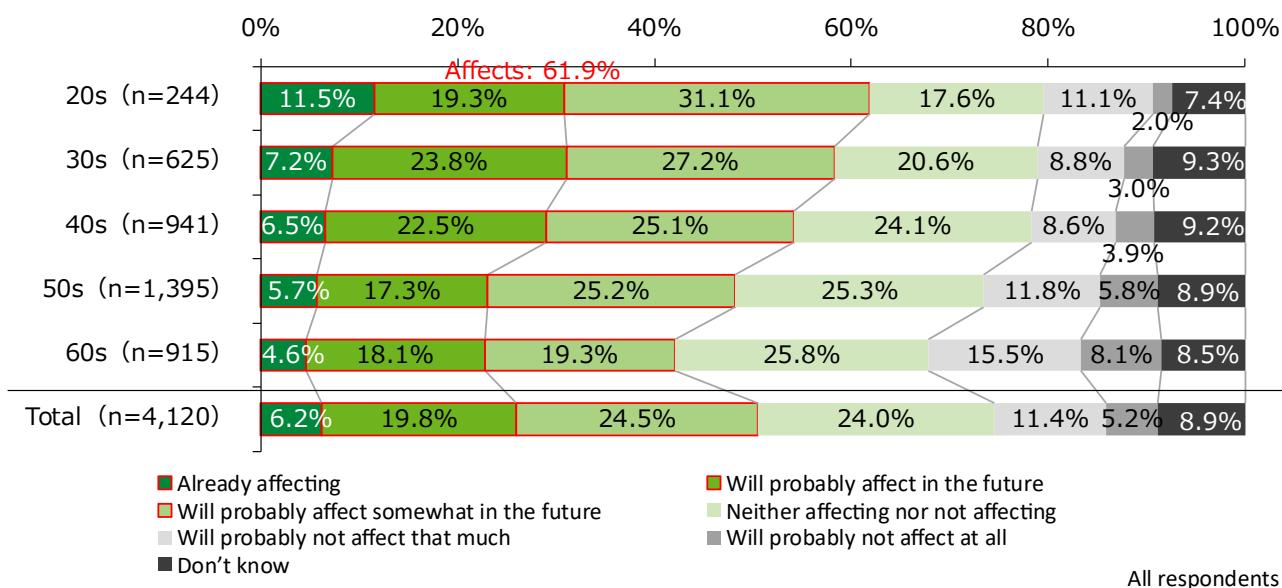
This chapter analyzes how societal changes (macro trends) are impacting the future supply and demand of "work," and how this is transforming individual perceptions.

2.1. The Impact of Digital Transformation (DX)

First, we focused on the impact of digital transformation (DX) as one of the key changes. 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. When asked whether they believe DX initiatives—such as the use of generative AI and robot implementation—will impact or change their work over the next 2–3 years, 50.5% of all respondents answered that it affects (sum of "Already affecting," "Will probably affect in the future" and "Will probably affect somewhat in the future") (Figure 1).

A breakdown of this result by age group shows that younger respondents tend to feel a stronger impact of DX on their work. Among those in their 20s, 61.9% believe DX is affecting their work, a significantly higher percentage than those in their 60s (42.0%).

Figure 1: Impact of DX on Work – By Age Group



According to a Nihon Keizai Shimbun survey conducted in October 2025,^{*6} approximately 40% of job-hunting students have changed their desired job category "in anticipation of the spread of generative AI," indicating that the impact on career choices among the younger generation is already becoming apparent. Furthermore, it is reported that in AI-advanced countries like the United States, routine tasks in office work that were traditionally handled by new hires are being replaced by AI, leading to reduced training opportunities for new employees, a decline in hiring inexperienced workers, and workforce reductions. Such cases may be perceived by young people as problems they themselves could face in the future, making their sense of crisis more acute.

*6 Source: "Labor Crisis: AI Job Losses Prompt Caution Among Job Seekers." *Nihon Keizai Shimbun*, November 23, 2025

Furthermore, in terms of characteristics based on attributes, differences in results were observed not

only by age group but also by the employer's sector and job category. By sector, Information and Communications (59.0% reporting DX is affecting or will affect) and Finance and Insurance (55.8% reporting the above) showed a higher tendency for respondents to feel their work was affected. By job category, technical specialist, e.g., for R&D, design, SE (56.4% reporting the above) also had a higher proportion of feeling an impact.

2.2. Specific Impacts and Changes to Work Due to DX

When we asked workers who responded in Figure 1 that DX is "already affecting" or that it "will probably affect in the future (somewhat)" to describe in open-ended responses the specific nature of that impact, trends emerged based on age group.

Those in their 20s to 40s cite numerous concrete examples of implementing generative AI and other technologies, demonstrating how they have already achieved greater efficiency in their daily work through technology. On the other hand, concerns were also raised that the elimination of routine tasks would lead to the sophistication of human work, subjecting people to constant pressure to upgrade their skills. While the older generation feels a vague sense of job insecurity, the younger generation is acutely aware that they must embrace DX and generative AI and strongly feel that failing to keep pace with these changes will result in losing their positions.

In contrast, those in their 50s and 60s express expectations for improved work efficiency and productivity, while frequently mentioning concerns about workforce reductions and widening disparities. Words like "don't know" and "sort of" appear more frequently than among younger people, suggesting that many still feel a vague sense of unease rather than concrete concerns. Furthermore, given that these age groups include many managers, concerns were also raised about where responsibility for AI-generated deliverables would lie.

These perceptions across different age groups are likely to influence future career planning and job selection.

Specific Impacts and Changes to Work Due to DX (Open-Ended Responses, Excerpted)

Trends among those in their 20s to 40s (Responses: 866)

- **A tangible sense that DX is already integrated into work:** Using generative AI has become routine, with numerous concrete examples cited—such as creating documents and meeting minutes, translation, design and code generation.
 - "When it comes to brainstorming or verifying specifications, AI is often faster and more accurate."
 - "Image editing that previously required specialists can now be done instantly."
 - "AI has become sufficient for tasks like preparing materials and design work."
- **Expectations and concerns regarding job sophistication:** While welcoming the shift "from routine tasks to thinking, judgment, and added value," they are concerned about increased burdens due to the sophistication of job duties. Additionally, they mention the practical burdens resulting from changes in sales styles and system overhauls.

- "While administrative tasks become streamlined and the workload is reduced, the freed-up capacity must be used to provide other value, and the demands placed on us will likely become more sophisticated."
- "We are being asked to differentiate ourselves from AI in report writing and to accelerate work processes using AI."
- "We currently operate locally, but going forward, online expansion will lead to nationwide competition."
- **Skill acquisition as a prerequisite:** Recognizing that acquiring DX and generative AI skills is essential to continue their current work, they cite the particular importance of prompt writing skills, verification capabilities and the ability to integrate AI into work processes. At the same time, there are also references to the difficulty of training new employees due to the reduction in routine tasks.
 - "Without knowledge on the part of the user, the finished product becomes completely unusable, so I think it depends on the user (their ability to ask questions and scrutinize whether the content is correct)."
 - "We will be forced to think about better ways to use the system."
 - "The tasks previously handled by new hires are beginning to be replaced by AI, necessitating a change in training methods."

Trends among those in their 50s and 60s (Responses: 943)

- **Abstract anticipation:** While there is strong anticipation for a reduction in routine tasks, concrete use cases are fewer compared to younger age groups. "Don't know" (51 responses) and "Sort of" (25 responses) appear more frequently than among younger age groups, with a noticeable segment acknowledging the impact while remaining unclear or undecided about the specifics.
 - "Overall work operations have become streamlined, freeing up time for new business creation and other initiatives."
 - "I expect that work will become easier as people incapable of creative work will no longer be around."
- **Anxiety over job cuts:** Concerns about workforce reductions, reassignments and department closures repeatedly appear, revealing strong anxiety in terms of protecting one's job. Pressure to reduce labor and fixed costs is also a factor.
 - "In anticipation of personnel becoming unnecessary, no replacements are hired even when employees retire or take leave of absence."
 - "My current position dedicated solely to administrative duties will probably be eliminated, and I will likely be assigned to sales or anything else."
 - "As DX advances, I, being old, will be transferred to a demanding department that requires manpower."
- **Concerns over widening skill gaps:** There is a sense of crisis that the gap between individuals will widen based on whether they can master generative AI, along with concerns about declining quality of deliverables. There is also a demand for retraining and professional development.
 - "While systems are in place to train newcomers in core business operations, generative AI requires self-directed mastery. This will widen the gap between those like me who struggle

with it and those who excel."

- "People who use generative AI, those who don't and those who can't—their outputs differ, and there are fewer outputs with solid substance."
- "I wish there were places (like public lectures) where I could study and keep up with new things at my age. I'm concerned that there aren't many so far."

- **Concerns about accountability:** Mention of issues such as misinformation, oversight, and concerns about accountability are more prevalent than among younger age groups. Furthermore, concerns have been raised about the weakening of communication and the difficulty in making decisions and reaching consensus as digitalization advances.
 - "AI will handle tasks like creating documents and managing company bulletin boards, which could lead to incorrect information being posted. The responsibility is daunting."
 - "Human communication is becoming sparse, and work decisions seem to be made too easily."
 - "AI adoption has already progressed significantly, and I feel a greater lack of communication than ever before."

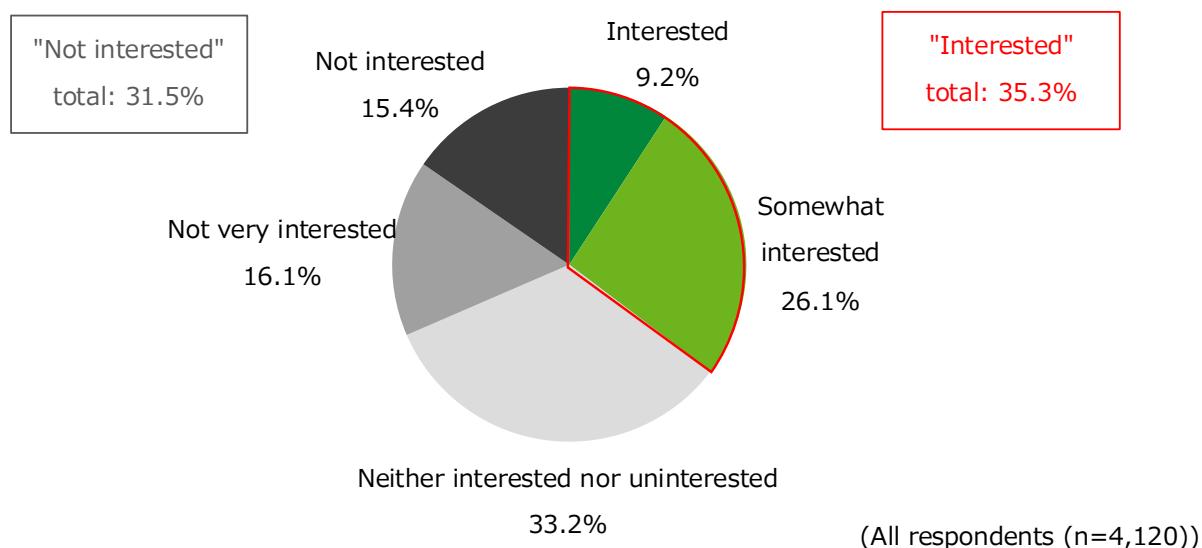
2.3. Level of Interest in Engaging in Non-Desk Work in the Future

Next, when we asked workers currently engaged in desk work about their interest in transitioning to non-desk work in the future, 35.3% expressed interest,^{*7} exceeding the 31.5% who showed no interest^{*8} (Figure 2). The same question was asked in fiscal year 2024, and the percentage of respondents who answered "Interested" (36.8%) remained largely unchanged.

*7 Sum of "Somewhat interested" and "Interested"

*8 Sum of "Not very interested" and "Not interested"

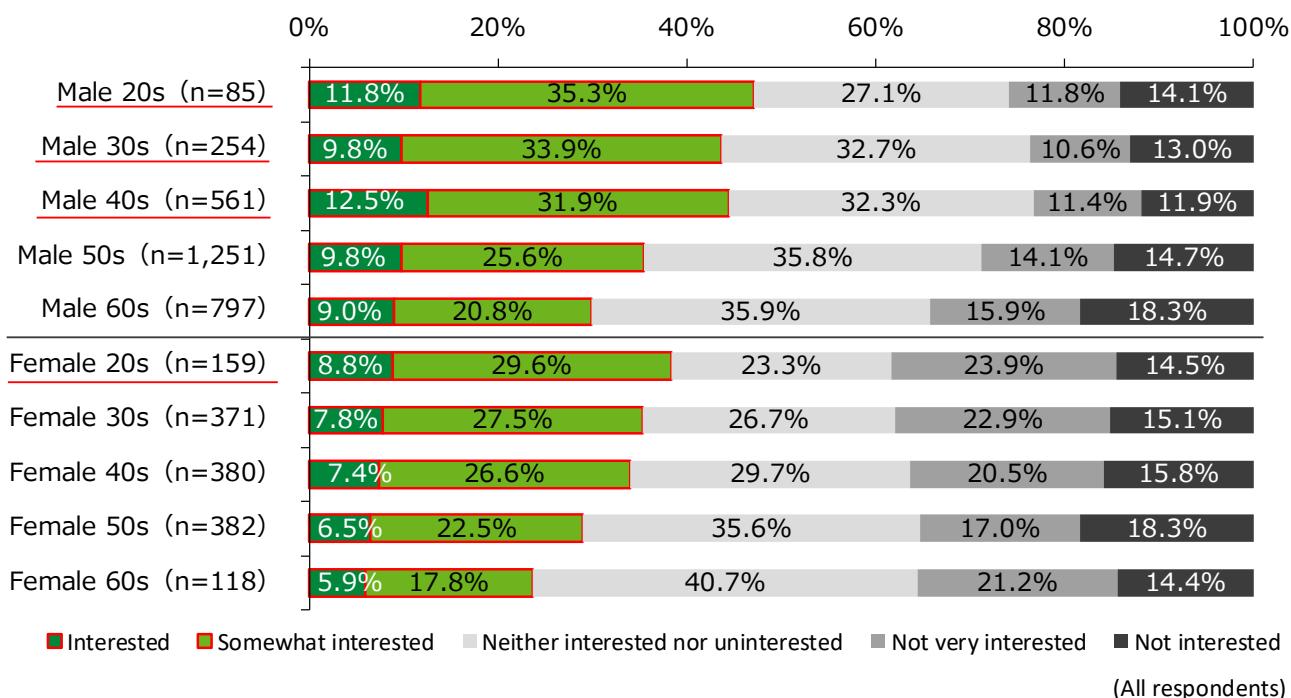
Figure 2: Level of Interest in Engaging in Non-Desk Work in the Future



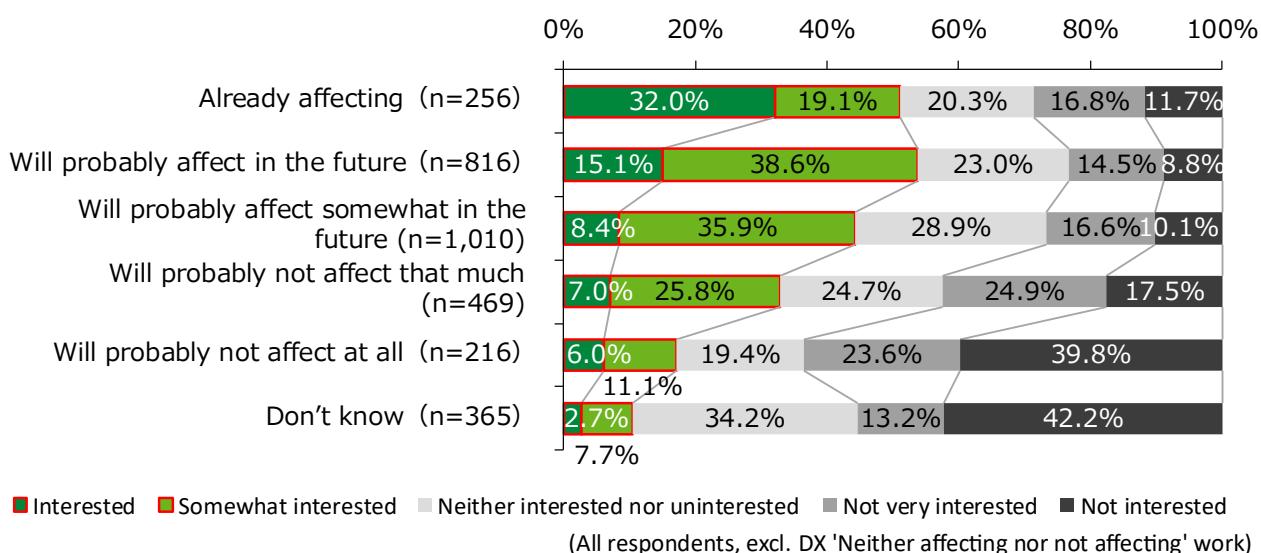
Full text of question: An increasing number of people are working past the age of 60 due to a decline in the labor force and an increase in healthy life expectancy. In particular, non-desk work* is facing a severe labor shortage compared to desk work, which is becoming more efficient due to AI, and is expected to see an increase in demand for labor. A rise in demand is expected to improve wages, and in the United States, there has been a reversal in wages between some non-desk work and desk work. Given these social situations, are you interested in doing non-desk work in the future? Please select the one that most applies to you.

*Non-desk work: Work performed in a variety of sites rather than at the desk. Specific occupations are wide ranging, including construction workers, care service workers, security guards, janitors, drivers, delivery workers, building superintendents, merchandise sales workers, restaurant/bar workers, manufacturing plant workers, doctors, nurses and other health care workers, train drivers, ship and aircraft operators, and agricultural, forestry and fishery workers.

Comparing this result by gender and age group, we found that men in their 20s to 40s tended to have a high level of interest, with nearly 50% saying they were "(somewhat) interested" (Figure 3). This reflects the same trend as the 2024 survey. On the other hand, the percentage of women in their 20s who are interested (38.4%) saw a slight increase from the previous survey (33.5%). Additionally, among those in their 60s, the proportion who responded "Not interested/Not very interested" decreased slightly for both men (38.4% → 34.2%) and women (41.9% → 35.6%), while the proportion who responded "Neither interested nor uninterested" increased, indicating a softening of attitudes.

Figure 3: Level of Interest in Engaging in Non-Desk Work in the Future – By Gender and Age Group

Furthermore, when comparing interest levels in non-desk work by the impact of DX on work as shown in Figure 1, a trend emerged where those who perceived an impact from DX tended to show higher interest in non-desk work (Figure 4). The sense of crisis surrounding job changes or loss is thought to be driving interest in non-desk work as a new option.

Figure 4: Level of Interest in Engaging in Non-Desk Work in the Future – By Impact of DX on Work

Among young people in the United States, a leading nation in AI, interest in non-desk work—particularly in so-called “blue-collar jobs” referring to technical positions—has been growing in recent years. A trend has been observed where fewer students are entering four-year universities, while applicants to vocational training schools are increasing. Additionally, reports indicate that income from non-desk work is on the rise. These trends indicate that the impact of DX is not limited to specific countries or regions, but is a phenomenon progressing globally. In other words, the growing interest in non-desk work should be viewed not as a phenomenon unique to Japan or a passing trend, but as part of a global structural shift.

2.4. Conditions for Taking on or Sparking Interest in Non-Desk Work

Furthermore, when asked what conditions or jobs might lead them to consider non-desk work in the future or spark their interest in it, “Can secure days off” ranked first among those who expressed interest, while “Paid higher wages than current job” ranked first among those who were uninterested or neither interested nor uninterested (Figures 5 and 6).

By age group, regardless of interest, those in their 20s and 30s place greater importance on factors such as “Higher wages than current job” and “Can secure days off (e.g., two days off per week).” To attract younger workers, improving wage levels and creating workplaces that facilitate taking days off can be considered effective strategies. In contrast, among those in their 50s and 60s who expressed interest, items related to work-life balance—such as “Can work at preferred times; easy to balance work and personal life” and “Can work near home/commute is short”—were relatively more important, and the priority for wage increases was lower than among younger age groups.

**Figure 5: Conditions for Engaging in Non-Desk Work (“Interested” Respondents)
– By Age Group (Top Selections)**

Rank		20s (n=101)	30s (n=242)	40s (n=378)	50s (n=469)	60s (n=266)	Total
1	Can secure days off (e.g., two days off per week)	63.4%	59.1%	48.4%	49.3%	41.0%	50.1%
2	Can work at preferred times; easy to balance work and personal life	44.6%	54.5%	46.6%	48.8%	52.3%	49.5%
3	Higher wages than current job	61.4%	62.4%	49.7%	43.5%	38.3%	48.6%
4	Can work near home/commute is short	45.5%	45.5%	48.7%	51.0%	46.2%	48.2%
5	A workplace with good interpersonal relationships	30.7%	35.1%	36.0%	38.0%	28.9%	34.8%
6	Regular work days and hours (e.g., weekends off, 8 hours per day)	42.6%	41.3%	32.5%	33.5%	25.2%	33.7%

(Those who are 'somewhat' interested' in non-desk work (n=1,456))

Figure 6: Conditions That Spark Interest in Non-Desk Work (“Not Interested” and “Neither Interested Nor Uninterested” Respondents) – By Age Group (Top Selections)

Rank		20s (n=143)	30s (n=383)	40s (n=563)	50s (n=926)	60s (n=649)	Total
1	<u>Higher wages than current job</u>	52.4%	56.9%	44.2%	41.3%	29.7%	41.9%
2	Can secure days off (e.g., two days off per week)	40.6%	43.6%	32.1%	28.7%	20.0%	30.1%
3	Can work at preferred times; easy to balance work and personal life	30.8%	37.3%	30.9%	28.2%	23.4%	29.1%
4	Can work near home/commute is short	26.6%	36.0%	30.6%	28.1%	22.5%	28.3%
5	A workplace with good interpersonal relationships	23.8%	28.5%	23.6%	23.0%	15.3%	22.1%
6	Regular work days and hours (e.g., weekends off, 8 hours per day)	27.3%	30.8%	22.4%	17.5%	12.9%	19.9%
:	:	:	:	:	:	:	:
	Would not want to engage in non-desk work under any condition or for any kind of job	16.1%	13.8%	18.8%	19.9%	27.7%	20.5%

(Those who are 'not (very) interested' or 'neither interested nor uninterested' in non-desk work (n=2,664))

In recent years, even in Japan’s non-desk work sectors, improvements in wages and working conditions have been advancing in response to labor shortages and work-style reforms. However, it is highly likely that the actual state of these improvements is not sufficiently recognized. In fact, many of those who responded “Not interested” cited negative impressions as the reasons (open-ended comments), such as: “While some job categories interest me, wages are generally low,” “I’d likely end up doing harder work for lower pay” and “The image is of low pay and poor workplace environments like bad interpersonal relationships.”

However, as shown in Figure 6, even among those who responded “Not interested/Neither interested nor uninterested,” only 20% stated they “would not want to engage in non-desk work under any condition or for any kind of job.” This indicates that the majority would consider choosing non-desk work depending on the conditions. Companies and industries aiming to resolve labor shortages in non-desk roles will likely need to continuously improve compensation while actively communicating these changes in the job market to raise awareness.

2.5. Non-Desk Jobs of Interest

Figure 7 shows the results of asking respondents who answered they were “(somewhat) interested” in non-desk work about the occupations they would be interested in pursuing if they were to work in non-desk roles in the future. In this question, we presented 19 typical non-desk occupations selected from a wide range of sectors as realistic options for career changes, and asked respondents to select all of the options they would prefer.

Overall, “Don’t know” ranked highest, while “Apartment/building superintendent” topped the list by occupation. The fact that “Don’t know” ranked highest likely stems from desk workers’ difficulty in forming a clear image of the actual work content and nature of non-desk jobs. By age group, “Sales clerk” (25.6%) were more common among those in their 30s, while “Farm worker” (18.8%) were more common among those in their 40s compared to other age groups.

Figure 7: Non-Desk Jobs of Interest – By Age Group (Top Selections)

Rank		20s (n=101)	30s (n=242)	40s (n=378)	50s (n=469)	60s (n=266)	Total
1	Condominium/building superintendent	23.8%	24.8%	26.2%	30.5%	24.8%	26.9%
2	Sales clerk	18.8%	25.6%	18.0%	16.8%	12.8%	18.0%
3	Catering, lodging or other hospitality service worker	21.8%	23.1%	16.1%	17.3%	13.9%	17.7%
4	Farm worker	9.9%	12.8%	18.8%	15.1%	10.5%	14.5%
5	Manufacturing production process worker	6.9%	9.9%	14.3%	13.2%	8.3%	11.6%
6	Building cleaner	8.9%	10.3%	12.7%	13.0%	6.0%	10.9%
7	Truck driver	9.9%	4.5%	7.7%	13.0%	10.5%	9.5%
8	Delivery worker	7.9%	6.2%	9.3%	11.7%	7.9%	9.2%
9	Housekeeping service or home cleaning worker	12.9%	11.2%	9.8%	9.4%	4.1%	9.1%
10	Cook	6.9%	12.0%	6.6%	7.9%	5.3%	7.7%
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	Don’t know	30.7%	28.1%	28.0%	31.3%	41.4%	31.7%

(Those who are 'somewhat interested' in non-desk work (n=1,456))

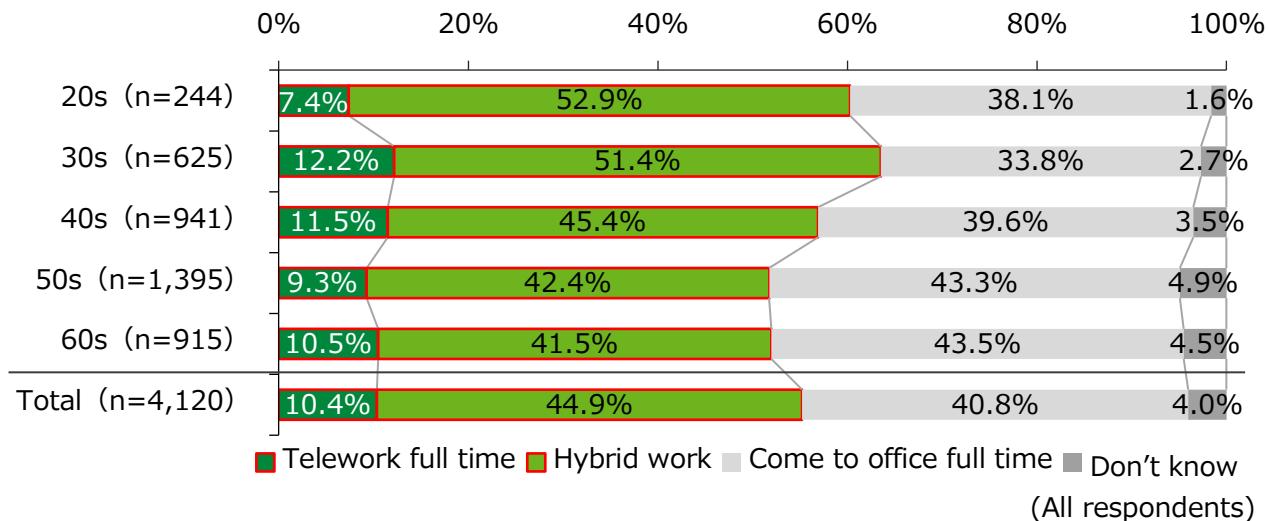
3. Work-Related Values and Needs

Chapter 3 examines the values and needs regarding desk workers' jobs by age group.

3.1. Ideal Work Style (Telework Full Time / Hybrid Work / Come to Office Full Time)

When asked to choose their ideal work style from three options, younger respondents showed a higher tendency toward "Telework full time" and "Hybrid work" (Figure 8).

Figure 8: Ideal Work Style – By Age Group

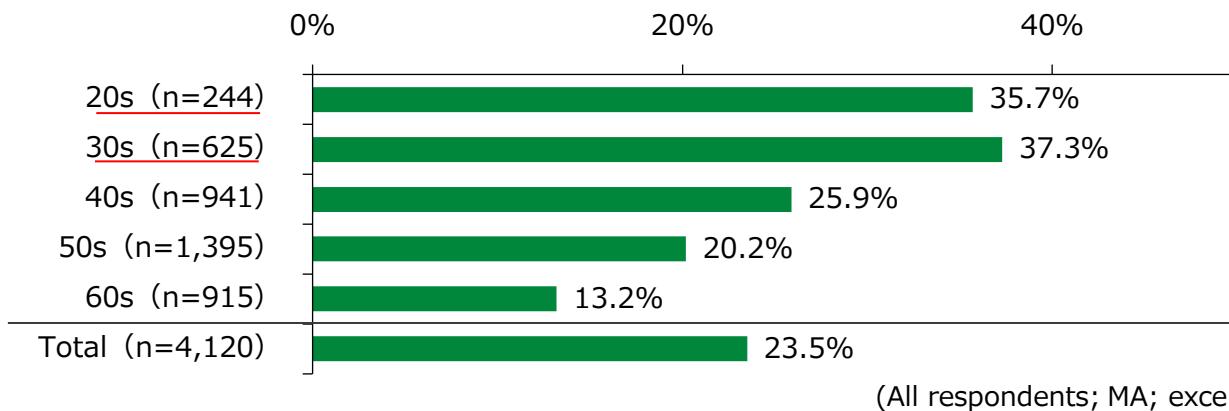


However, even among those in their 50s and 60s, who have a relatively high proportion of coming to the office full time, it was found that over half consider a work style that includes telework to be ideal. Following the COVID-19 pandemic, telework has rapidly become widespread and established, leading to the acceptance of flexible, location-independent work styles not only among younger generations but also among the older age groups.

3.2. Intention to Engage in Side Jobs

Similarly, when asked about their intentions to implement specific flexible work arrangements such as "Side job allowed by employer" and "Live and work in two locations or move to and work from suburb or countryside," the younger generation showed a higher tendency in both. These measures are being promoted by the government to address labor shortages, revitalize regional areas and correct the excessive concentration of population and resources in central Tokyo. As government support for these initiatives intensifies, they are expected to gain broader societal adoption.

Looking at each in detail, the results of asking about the intention to engage in "Side job allowed by employer" are shown in Figure 9. The percentage was higher among younger age groups, reaching 35.7% for those in their 20s and 37.3% for those in their 30s, significantly exceeding the overall total of 23.5%.

Figure 9: Intention to Engage in Side Jobs – By Age Group

(All respondents; MA; excerpt)

Additionally, when we asked those who responded that they wish to engage in "Side job allowed by employer" about the type of side job they would like to pursue, the top overall response was "Can take advantage of free time, such as weekends or outside regular work hours." However, focusing solely on those in their 20s and 30s, "Can earn money while doing something I enjoy, such as a hobby" ranked first (Figure 10).

In contrast, among those in their 50s and 60s, the percentage who chose "Can continue even after retirement" was significantly higher than other age groups, exceeding the overall total (33.9%) by more than 10 percentage points.

Figure 10: Preferred Type of Side Job – By Age Group

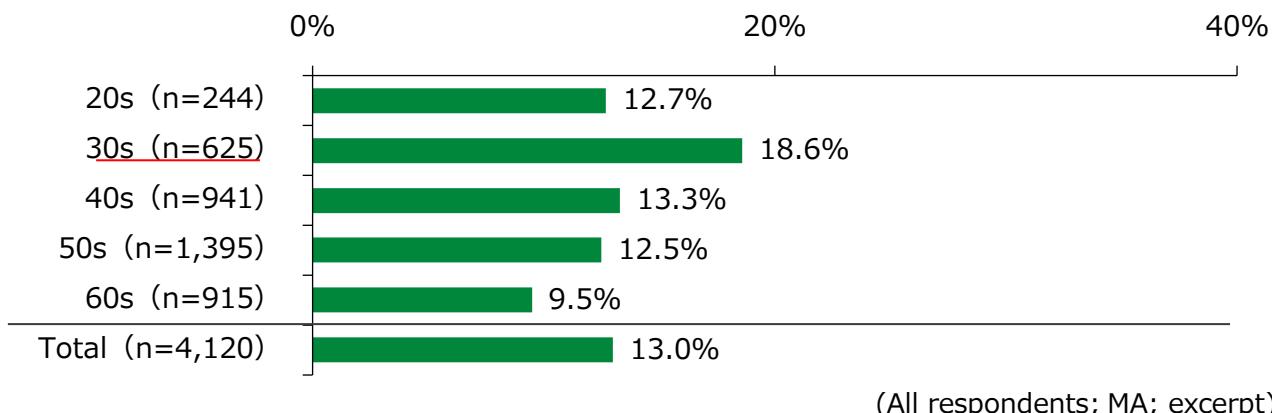
Rank		20s (n=87)	30s (n=233)	40s (n=244)	50s (n=282)	60s (n=121)	Total
1	Can take advantage of free time, such as weekends or outside regular	66.7%	70.4%	65.2%	58.9%	52.9%	63.2%
2	Can earn money while doing something I enjoy, such as a hobby	77.0%	71.2%	61.9%	54.3%	47.9%	61.5%
3	Can take advantage of my past career	43.7%	45.9%	49.2%	39.0%	50.4%	45.1%
4	Can experience work that is different from my past career	33.3%	33.0%	38.5%	35.5%	24.8%	34.1%
5	Can continue even after retirement	11.5%	20.6%	35.7%	45.7%	44.6%	33.9%
6	Leads to skill improvement and networking for my main job	29.9%	33.0%	34.8%	26.6%	22.3%	30.0%
7	Provides opportunity for physical activity	13.8%	18.0%	18.4%	18.4%	11.6%	17.1%
	Other	0.0%	0.4%	0.8%	0.4%	0.0%	0.4%
	Don't know; none in particular	3.4%	0.4%	1.2%	3.5%	4.1%	2.3%

(Those interested in 'side job allowed by employer' (n=967); MA)

3.3. Intention to Live in Two Locations or Relocating to the Suburb or Countryside

We then asked the respondents about their intentions to live and work in two locations or relocate to and work from the countryside (Figure 11). The 30s age group stood out with a significantly high intention rate of 18.6%, while the 60s age group had a relatively low rate, though about 10% of workers in that group said they have intentions.

Figure 11: Intention to Live in Two Locations or Relocating to the Suburb or Countryside – By Age Group



When we asked those who said they wanted to “live and work in two locations or relocate to and work from the countryside” the reason for wanting to do so, the most common reason overall was “Want to live where there is a lot of nature” (48.7%) (Figure 12). This was followed by “Want to live where climate is good (e.g., where it is cool in summer)” (46.8%), likely reflecting the growing severity of intense heatwaves amid recent climate change. The percentage of respondents who answered “Want to live where cost of living is low” was particularly high among those in their 40s and 60s. Recent inflation has impacted daily household budgets, and these economic changes may be beginning to influence people’s housing choices—where and how they live.

Figure 12: Reason for Wanting to Live in Two Locations or Relocating to the Suburb or Countryside – By Age Group

Rank		20s (n=31)	30s (n=116)	40s (n=125)	50s (n=175)	60s (n=87)	Total
1	Want to live where there is a lot of nature	58.1%	45.7%	56.8%	45.7%	43.7%	48.7%
2	Want to live where climate is good (e.g., where it is cool in summer)	29.0%	50.9%	49.6%	45.1%	47.1%	46.8%
3	Want to live where cost of living is low	35.5%	39.7%	50.4%	40.0%	46.0%	43.1%
4	Want to change my lifestyle drastically	16.1%	27.6%	23.2%	29.7%	29.9%	27.0%
5	Am interested in life in the countryside	29.0%	19.0%	24.8%	26.3%	18.4%	23.2%
6	Want to return to my hometown	29.0%	22.4%	20.0%	22.3%	12.6%	20.6%
7	Want to build new interpersonal relationships	16.1%	16.4%	20.8%	15.4%	12.6%	16.5%
8	Am interested in regional regeneration	12.9%	17.2%	20.0%	10.3%	9.2%	14.0%
9	Out of necessity (e.g., to care for a family member)	0.0%	9.5%	6.4%	9.1%	10.3%	8.2%
	Other	0.0%	4.3%	2.4%	1.1%	1.1%	2.1%
	Don't know; none in particular	9.7%	5.2%	4.8%	7.4%	5.7%	6.2%

Those interested in 'living and working in two locations or relocating to and work from suburb or countryside' (n=534); MA

4. Conclusion

In this report, we analyzed the impact of changes in social structure on desk workers' perceptions of work by age group, specifically examining how DX affects individual career choices. The survey results revealed that while workers anticipate efficiency gains from DX, many are beginning to perceive the uncertainty about how their own jobs will change as a concrete challenge. Among younger generations in particular, there is a strong sense of crisis that technology could directly impact their employment and careers, prompting them to rethink their future work styles and job choices.

This shift in awareness has also led to growing interest in non-desk work. As DX enables the automation of some desk work, previously envisioned career paths become uncertain, and non-desk work emerges as a realistic option. Furthermore, considering that the value placed on blue-collar jobs is also being reassessed overseas, including in the United States, phenomena such as the shift in career perspectives stemming from DX and the growing interest in non-desk work suggest that this is not unique to Japan. It indicates that the entire labor market is reaching a structural turning point.

This survey also revealed that interest in new work styles (and lifestyles), such as side jobs and relocation, is higher among younger generations. The value of seeking work styles unconstrained by location or time will become increasingly commonplace, and both companies and society will be required to adapt. This flexibility-oriented approach not only reshapes work styles but also blurs the previously distinct boundaries between desk work and non-desk work. It expands the possibilities for fluid working arrangements that

involve gradually moving between both types, going beyond traditional "job changes." Spot workers are already active in some non-desk roles, but establishing systems and environments that support this flexibility would further lower the barriers to entry for non-desk work. This could play a significant role in alleviating labor shortages.

In an era of advancing DX, people's values regarding how they want to work are diversifying more than ever before, and the relationship between work and people is undergoing a process of restructuring. To capture these signs of change, Xymax Research Institute will continue conducting surveys and research, and plans to provide insights aimed at solving labor market challenges.

Survey Overview

Survey name	Metropolitan Areas Office Worker Survey 2025
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 responses	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

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%.

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