

Metropolitan Areas Office Worker Survey 2024 <Summary Report>

Capturing changes in workers' work styles and values

December 9, 2024

To capture changes in work styles and locations from the perspective of both companies and office workers, Xymax Real Estate Institute has conducted the Metropolitan Areas Office Demand Survey for companies 16 times since the autumn of 2016 and the Greater Tokyo Office Worker Survey and the Metropolitan Areas Office Worker Survey for office workers eight times since the end of 2016. Xymax Real Estate Institute has released the results of the ninth office worker survey, which was conducted in October 2024. This summary report is an excerpt of the results.

Main Findings

- The office location with the highest percentage of "teleworkers," i.e., those who teleworked for any length of time at the time of the survey, was Greater Tokyo at 52.8% (Figure 1-1).
- In terms of the percentage of time spent in each work location, the time spent in the respondents' regular office was 75.0% in Greater Tokyo and more than 80% in other areas (Figure 2).
- The group of respondents who were less satisfied with their current work style tended to have higher intentions to leave their current employer and change jobs (Figure 3-1). Younger respondents also had higher intentions to change jobs (Figure 3-2).
- In terms of the respondents' dissatisfaction and issues with their current work style, "Stressful commute" (45.7%) and "Must come to office even if the work can be done by teleworking" (43.1%) were by far the most popular responses (Figure 4).
- The most popular office condition that respondents wanted to come to work in was "Availability of work facilities (e.g., communication network, appliances, workspace)" (60.3%), followed by "Easy to concentrate on work" (46.1%) (Figure 5).

<Survey Overview>

Survey period:	October 2024
Target respondents:	(1) Screening: Men and women between the ages of 20 and 69 whose occupation is company manager/executive or company employee and who live in the areas covered by the survey (2) Main survey: Those who answered in the screening that their occupation was either an executive or employee/staff of a company or organization whose job category was managerial, specialized/technical, clerical or sales and whose regular office was located in Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures), Osaka City, Nagoya City or Fukuoka City, whose residence was in Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures), or Gifu, Aichi, Mie, Shiga, Kyoto, Osaka, Hyogo, Nara, Wakayama, Fukuoka or 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

We grouped the work styles of the target respondents into “teleworking full time,” “hybrid work,” and “coming to office full time” and indicated their percentages in each office location. The percentage of teleworkers, which is the sum of the percentages of “teleworking full time” and “hybrid work,” was the highest in Greater Tokyo at 52.8%. Teleworkers also accounted for approximately 40% in regional cities (**Figure 1-1**).

Comparing the Greater Tokyo results to previous surveys, the percentage of teleworkers was unchanged from a year ago, although it has been declining since peaking in the 2021 survey (**Figure 1-2**).

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

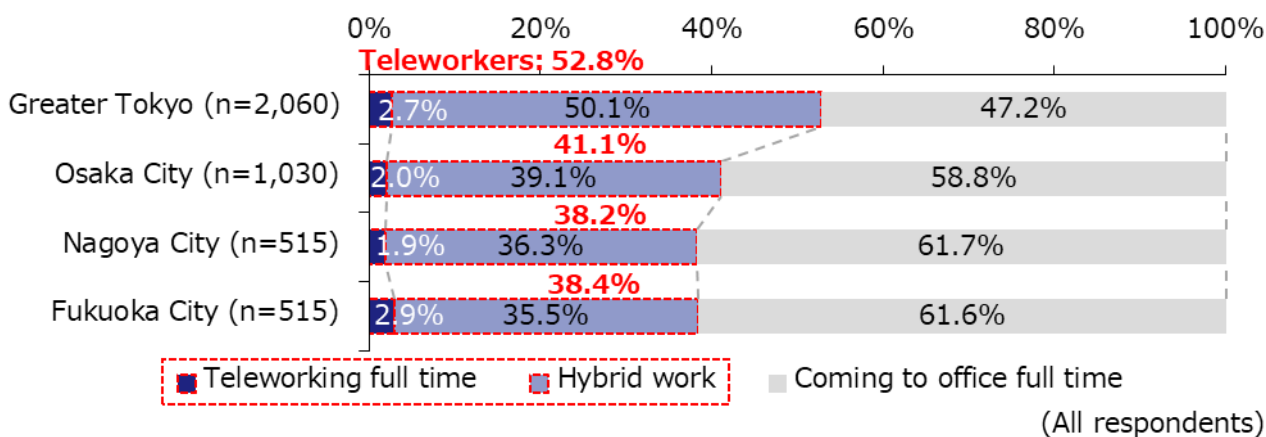
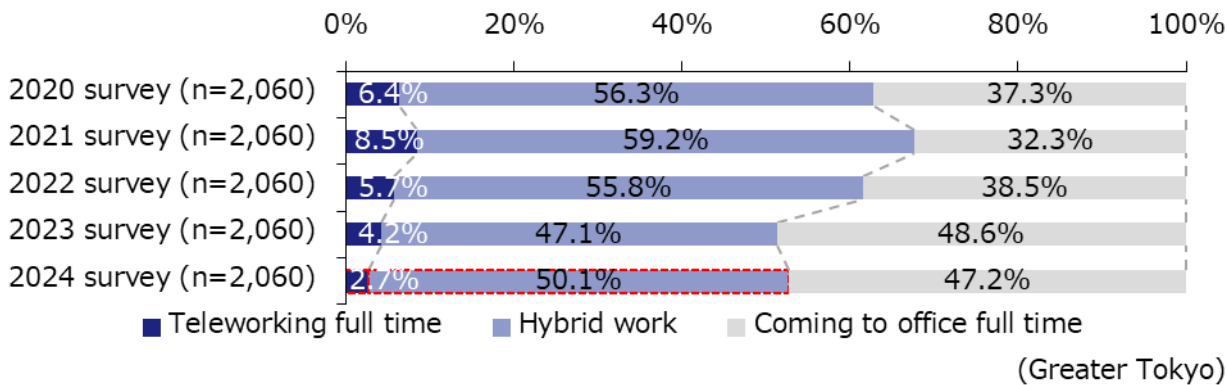


Figure 1-2: Coming to the Office or Teleworking (Greater Tokyo, Comparison over Time)

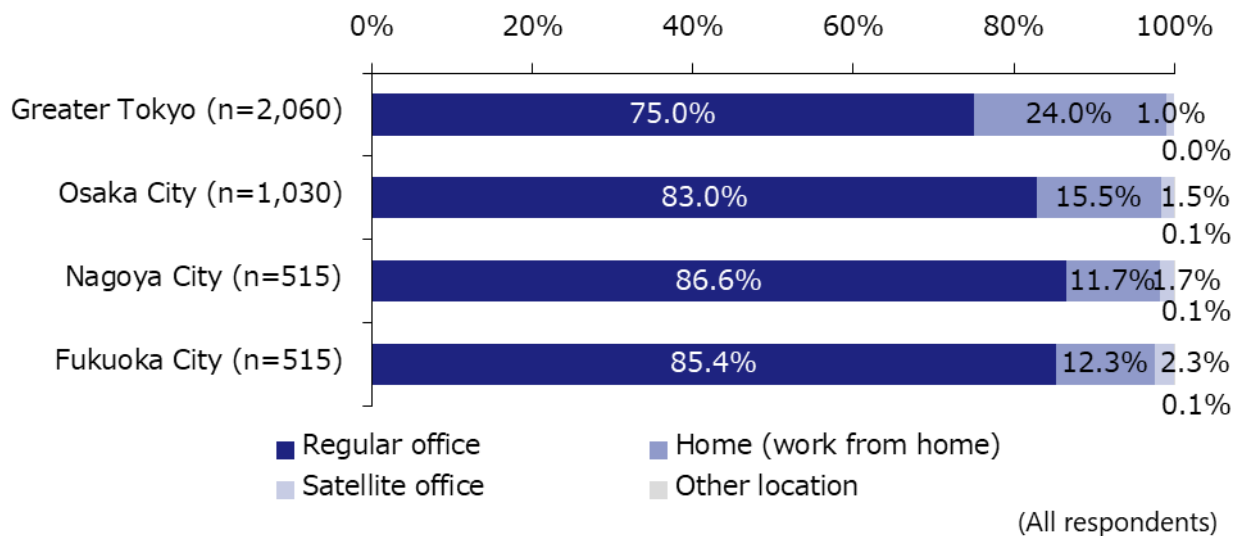


topic 2

We asked respondents how much time they spent at each work location, i.e., their “regular office,” “home (work from home),” “satellite office,” and “other location.” In terms of the average time spent in each place of work in each office location, the time spent in the “regular office” was 75.0% in Greater Tokyo and more than 80% in other areas (**Figure 2**).

The result also shows that a large majority of the time spent at places other than the respondents’ regular office, or teleworking, in other words, was spent at home.

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



topic 3

When we asked respondents about their intentions to leave their current employer and change jobs, the percentage of those who had intentions to change jobs (the sum of “Have decided to change job/Am looking for new job”) and “Want to change job if possible”) was 32.0%.

Comparing this result with respondents’ satisfaction with their work style, the group of respondents who were less satisfied tended to have higher intentions to change jobs (**Figure 3-1**). Among the least satisfied (“very dissatisfied”) respondents, “Have decided to change job/Am looking for new job” alone accounted for 15.5%, and “Want to change job if possible” accounted for as much as 67.4%.

In terms of age group, younger respondents had higher percentages of intentions to change jobs, as high as 49.1% for those in their 20s and 45.7% for those in their 30s (**Figure 3-2**).

Figure 3-1: Intentions to Leave Current Employer and Change Jobs – By Satisfaction with Current Work Style

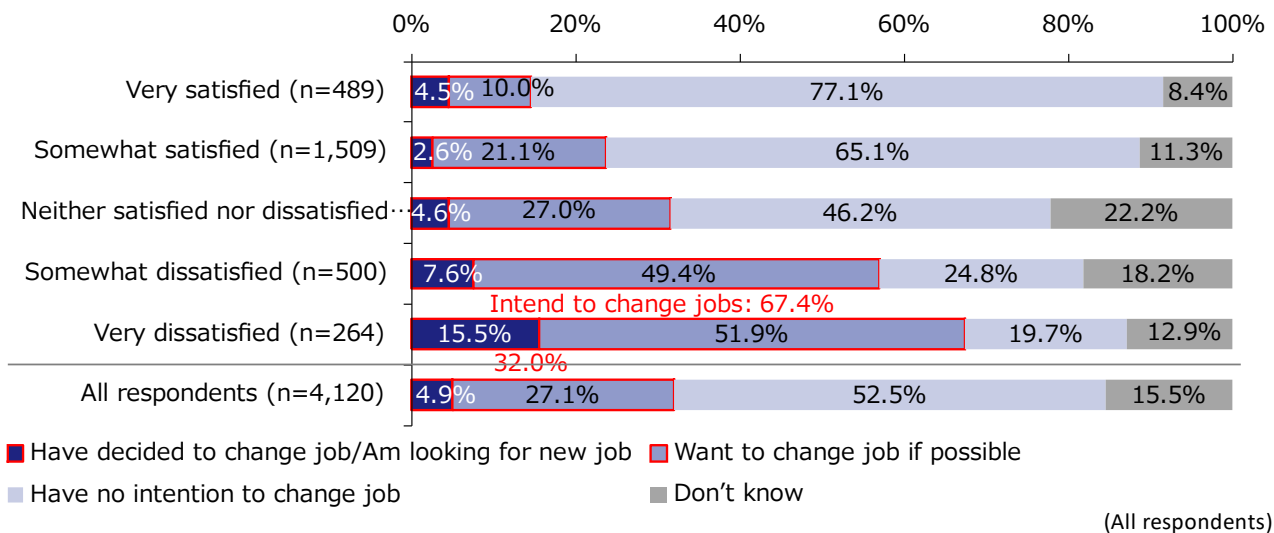
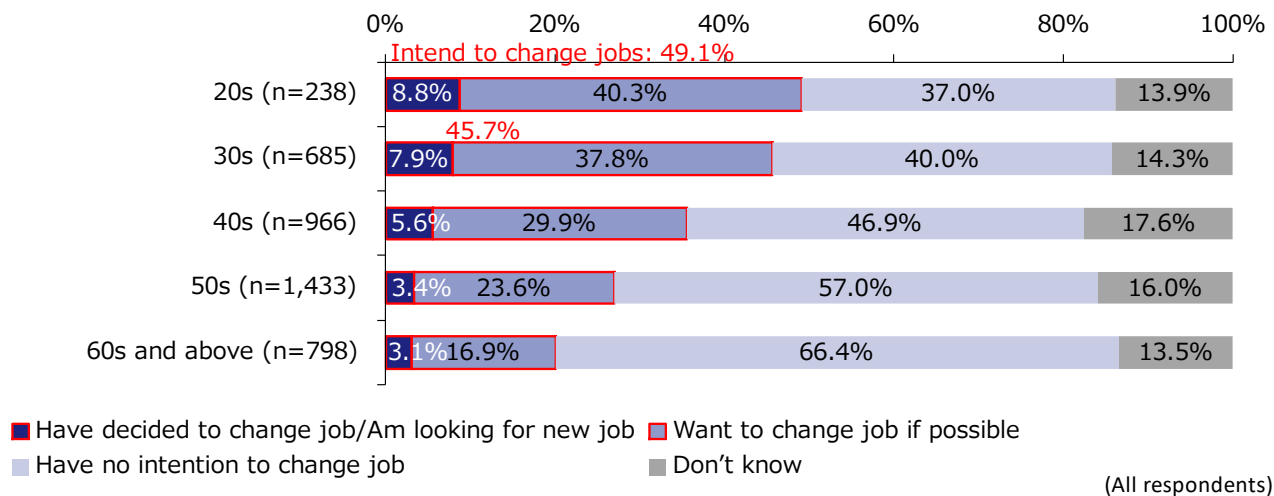


Figure 3-2: Intentions to Leave Current Employer and Change Jobs – By Age Group



topic 4

When we asked the respondents who replied they were “(Somewhat or very) dissatisfied” with their current work style about their specific dissatisfactions and issues, “Stressful commute” (45.7%) and “Must come to office even if the work can be done by teleworking” (43.1%) were by far the most popular responses (**Figure 4**).

The top two responses were followed by dissatisfaction with not being able to telework, such as “Working from home now prohibited or restricted” (21.6%) and “Difficult to telework due to workplace atmosphere or supervisor’s intentions” (18.2%). As hybrid work becomes the norm, forcing workers to come to the office unnecessarily will likely lead to workers’ dissatisfaction.

Figure 4: Dissatisfaction or Issue with Current Work Style



(Workers who are “(Somewhat or very) dissatisfied” with their current work style (n=764); MA)

topic 5

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 5**). The top responses were “Availability of work facilities (e.g., communication network, appliances, workspace)” (60.3%) and “Easy to concentrate on work” (46.1%), suggesting that workers place importance on functional comfort as a value required in an office.

“Don’t want to come to any office,” an exclusive choice, remained at 12.8%, indicating that a large majority of workers don’t mind coming to the office if the office meets their needs.

If companies were to require workers to return to the office, it would be crucial 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 5: Conditions of Office Where Workers Want to Come to Work



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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