Metropolitan Areas Office Worker Survey 2024 <Detailed Report>

Capturing changes in workers' work styles and values

December 9, 2024

Xymax Real Estate Institute

Survey Overview

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.

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 ninth office worker survey conducted in October 2024.

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 2023 (1) Work Style Reality and Needs*, released on December 13, 2023
https://www.xymax.co.jp/english/assets/pdf/news_research/20231213_1_detailed.pdf

・*Metropolitan Areas Office Worker Survey 2023 (2) Evaluation of Work Styles*, released on December 13, 2023
https://www.xymax.co.jp/english/assets/pdf/news_research/20231213_2_detailed.pdf

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

Survey Overview

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

Gender and age	Male aged 20-29	82 (2.0%)	Number of employees at workplace	1–9	320 (7.8%)	Sector	Manufacturing	851 (20.7%)
	Male aged 30-39	280 (6.8%)		10–49	528 (12.8%)		Information & communications	630 (15.3%)
	Male aged 40-49	579 (14.1%)		50–99	335 (8.1%)		Wholesale & retail trade	474 (11.5%)
	Male aged 50-59	1,098 (26.7%)		100–299	579 (14.1%)		Finance & insurance	368 (8.9%)
	Male aged 60 or older	705 (17.1%)		300–999	708 (17.2%)		Services, N.E.C.	364 (8.8%)
	(Male total)	2,744 (66.6%)		1,000–2,999	485 (11.8%)		Construction	294 (7.1%)
	Female aged 20-29	156 (3.8%)		3,000 or more	1,064 (25.8%)		Real estate & goods rental and leasing	203 (4.9%)
	Female aged 30-39	405 (9.8%)		Don't know	101 (2.5%)		Scientific research, professional & technical services	186 (4.5%)
	Female aged 40-49	387 (9.4%)	Job category	Sales	967 (23.5%)		Transport & postal activities	162 (3.9%)
	Female aged 50-59	335 (8.1%)		General office work/reception/secretary	949 (23.0%)		Medical, health care & welfare	105 (2.5%)
	Female aged 60 or older	93 (2.3%)		Admin/HR/accounting	771 (18.7%)		Electricity, gas, heat supply and water	89 (2.2%)
	(Female total)	1,376 (33.4%)		Technical specialist, e.g. R&D, design, SE	768 (18.6%)		Education, learning support	60 (1.5%)
Form of employ-ment	Officer of company/organization	327 (7.9%)		Corporate planning	336 (8.2%)		Living-related and personal services & amusement services	57 (1.4%)
	Staff of company/organization (management)	1,000 (24.3%)		Creative specialist, e.g., editor, designer, writer	69 (1.7%)		Compound services	53 (1.3%)
	Staff of company/organization (Full-time staff other than management)	2,112 (51.3%)		Clerical specialist, e.g., research analysis, patent law	68 (1.7%)		Accommodations, eating & drinking services	44 (1.1%)
	Staff of company/organization (Other than full-time staff)	681 (16.5%)		Other	192 (4.7%)		Government, except elsewhere classified	43 (1.0%)
							Mining and quarrying of stone and gravel	5 (0.1%)
							Agriculture and forestry	3 (0.1%)
							Fishery	1 (0.0%)
							Other & industries unable to classify	128 (3.1%)

Survey Overview

Attributes of Respondents: Greater Tokyo (n=2,060)

Gender and age	Male aged 20-29	38 (1.8%)	Number of employees at workplace	1–9	148 (7.2%)	Sector	Manufacturing	447 (21.7%)
	Male aged 30-39	138 (6.7%)		10–49	226 (11.0%)		Information & communications	334 (16.2%)
	Male aged 40-49	295 (14.3%)		50–99	161 (7.8%)		Finance & insurance	205 (10.0%)
	Male aged 50-59	584 (28.3%)		100–299	303 (14.7%)		Wholesale & retail trade	205 (10.0%)
	Male aged 60 or older	382 (18.5%)		300–999	355 (17.2%)		Services, N.E.C.	195 (9.5%)
	(Male total)	1,437 (69.8%)		1,000–2,999	251 (12.2%)		Construction	135 (6.6%)
	Female aged 20-29	64 (3.1%)		3,000 or more	565 (27.4%)		Scientific research, professional & technical services	100 (4.9%)
	Female aged 30-39	179 (8.7%)		Don't know	51 (2.5%)		Real estate & goods rental and leasing	98 (4.8%)
	Female aged 40-49	189 (9.2%)	Job category	Technical specialist, e.g. R&D, design, SE	441 (21.4%)		Transport & postal activities	84 (4.1%)
	Female aged 50-59	143 (6.9%)		General office work/reception/secretary	438 (21.3%)		Medical, health care & welfare	45 (2.2%)
	Female aged 60 or older	48 (2.3%)		Sales	432 (21.0%)		Electricity, gas, heat supply and water	32 (1.6%)
	(Female total)	623 (30.2%)		Admin/HR/accounting	376 (18.3%)		Government, except elsewhere classified	29 (1.4%)
Form of employ-ment	Officer of company/organization	160 (7.8%)		Corporate planning	196 (9.5%)		Living-related and personal services & amusement services	25 (1.2%)
	Staff of company/organization (management)	507 (24.6%)		Clerical specialist, e.g., research analysis, patent law	39 (1.9%)		Education, learning support	24 (1.2%)
	Staff of company/organization (Full-time staff other than management)	1,067 (51.8%)		Creative specialist, e.g., editor, designer, writer	30 (1.5%)		Compound services	22 (1.1%)
	Staff of company/organization (Other than full-time staff)	326 (15.8%)		Other	108 (5.2%)		Accommodations, eating & drinking services	19 (0.9%)
							Mining and quarrying of stone and gravel	3 (0.1%)
							Agriculture and forestry	1 (0.0%)
							Other & industries unable to classify	57 (2.8%)

Survey Overview

Attributes of Respondents: Osaka City (n=1,030)

Gender and age	Male aged 20-29	16 (1.6%)	Number of employees at workplace	1–9	94 (9.1%)	Sector	Manufacturing	221 (21.5%)
	Male aged 30-39	58 (5.6%)		10–49	151 (14.7%)		Information & communications	156 (15.1%)
	Male aged 40-49	134 (13.0%)		50–99	90 (8.7%)		Wholesale & retail trade	127 (12.3%)
	Male aged 50-59	264 (25.6%)		100–299	124 (12.0%)		Services, N.E.C.	86 (8.3%)
	Male aged 60 or older	170 (16.5%)		300–999	173 (16.8%)		Finance & insurance	80 (7.8%)
	(Male total)	642 (62.3%)		1,000–2,999	110 (10.7%)		Construction	70 (6.8%)
	Female aged 20-29	52 (5.0%)		3,000 or more	264 (25.6%)		Scientific research, professional & technical services	50 (4.9%)
	Female aged 30-39	114 (11.1%)		Don't know	24 (2.3%)		Real estate & goods rental and leasing	50 (4.9%)
	Female aged 40-49	100 (9.7%)	Job category	General office work/reception/secretary	261 (25.3%)		Transport & postal activities	36 (3.5%)
	Female aged 50-59	99 (9.6%)		Sales	250 (24.3%)		Electricity, gas, heat supply and water	24 (2.3%)
	Female aged 60 or older	23 (2.2%)		Admin/HR/accounting	195 (18.9%)		Medical, health care & welfare	21 (2.0%)
	(Female total)	388 (37.7%)		Technical specialist, e.g. R&D, design, SE	166 (16.1%)		Living-related and personal services & amusement services	19 (1.8%)
Form of employ-ment	Officer of company/organization	86 (8.3%)		Corporate planning	63 (6.1%)		Education, learning support	17 (1.7%)
	Staff of company/organization (management)	228 (22.1%)		Creative specialist, e.g., editor, designer, writer	23 (2.2%)		Compound services	14 (1.4%)
	Staff of company/organization (Full-time staff other than management)	534 (51.8%)		Clerical specialist, e.g., research analysis, patent law	18 (1.7%)		Accommodations, eating & drinking services	13 (1.3%)
	Staff of company/organization (Other than full-time staff)	182 (17.7%)		Other	54 (5.2%)		Government, except elsewhere classified	9 (0.9%)
							Agriculture and forestry	1 (0.1%)
							Other & industries unable to classify	36 (3.5%)

Survey Overview

Attributes of Respondents: Nagoya City (n=515)

Gender and age	Male aged 20-29	13 (2.5%)	Number of employees at workplace	1–9	26 (5.0%)	Sector	Manufacturing	115 (22.3%)
	Male aged 30-39	40 (7.8%)		10–49	70 (13.6%)		Wholesale & retail trade	75 (14.6%)
	Male aged 40-49	75 (14.6%)		50–99	44 (8.5%)		Information & communications	59 (11.5%)
	Male aged 50-59	133 (25.8%)		100–299	75 (14.6%)		Services, N.E.C.	43 (8.3%)
	Male aged 60 or older	76 (14.8%)		300–999	90 (17.5%)		Construction	41 (8.0%)
	(Male total)	337 (65.4%)		1,000–2,999	72 (14.0%)		Finance & insurance	39 (7.6%)
	Female aged 20-29	18 (3.5%)		3,000 or more	127 (24.7%)		Transport & postal activities	23 (4.5%)
	Female aged 30-39	61 (11.8%)		Don't know	11 (2.1%)		Real estate & goods rental and leasing	23 (4.5%)
	Female aged 40-49	48 (9.3%)	Job category	Sales	152 (29.5%)		Medical, health care & welfare	20 (3.9%)
	Female aged 50-59	38 (7.4%)		General office work/reception/secretary	123 (23.9%)		Scientific research, professional & technical services	15 (2.9%)
	Female aged 60 or older	13 (2.5%)		Admin/HR/accounting	100 (19.4%)		Electricity, gas, heat supply and water	14 (2.7%)
	(Female total)	178 (34.6%)		Technical specialist, e.g. R&D, design, SE	81 (15.7%)		Education, learning support	11 (2.1%)
Form of employ-ment	Officer of company/organization	42 (8.2%)		Corporate planning	42 (8.2%)		Living-related and personal services & amusement services	7 (1.4%)
	Staff of company/organization (management)	138 (26.8%)		Clerical specialist, e.g., research analysis, patent law	5 (1.0%)		Accommodations, eating & drinking services	6 (1.2%)
	Staff of company/organization (Full-time staff other than management)	263 (51.1%)		Creative specialist, e.g., editor, designer, writer	4 (0.8%)		Compound services	6 (1.2%)
	Staff of company/organization (Other than full-time staff)	72 (14.0%)		Other	8 (1.6%)		Government, except elsewhere classified	2 (0.4%)
							Fishery	1 (0.2%)
							Other & industries unable to classify	15 (2.9%)

Survey Overview

Attributes of Respondents: Fukuoka City (n=515)

Gender and age	Male aged 20-29	15 (2.9%)	Number of employees at workplace	1–9	52 (10.1%)	Sector	Information & communications	81 (15.7%)
	Male aged 30-39	44 (8.5%)		10–49	81 (15.7%)		Manufacturing	68 (13.2%)
	Male aged 40-49	75 (14.6%)		50–99	40 (7.8%)		Wholesale & retail trade	67 (13.0%)
	Male aged 50-59	117 (22.7%)		100–299	77 (15.0%)		Construction	48 (9.3%)
	Male aged 60 or older	77 (15.0%)		300–999	90 (17.5%)		Finance & insurance	44 (8.5%)
	(Male total)	328 (63.7%)		1,000–2,999	52 (10.1%)		Services, N.E.C.	40 (7.8%)
	Female aged 20-29	22 (4.3%)		3,000 or more	108 (21.0%)		Real estate & goods rental and leasing	32 (6.2%)
	Female aged 30-39	51 (9.9%)		Don't know	15 (2.9%)		Scientific research, professional & technical services	21 (4.1%)
	Female aged 40-49	50 (9.7%)	Job category	Sales	133 (25.8%)		Electricity, gas, heat supply and water	19 (3.7%)
	Female aged 50-59	55 (10.7%)		General office work/reception/secretary	127 (24.7%)		Medical, health care & welfare	19 (3.7%)
	Female aged 60 or older	9 (1.7%)		Admin/HR/accounting	100 (19.4%)		Transport & postal activities	19 (3.7%)
	(Female total)	187 (36.3%)		Technical specialist, e.g. R&D, design, SE	80 (15.5%)		Compound services	11 (2.1%)
Form of employ-ment	Officer of company/organization	39 (7.6%)		Corporate planning	35 (6.8%)		Education, learning support	8 (1.6%)
	Staff of company/organization (management)	127 (24.7%)		Creative specialist, e.g., editor, designer, writer	12 (2.3%)		Accommodations, eating & drinking services	6 (1.2%)
	Staff of company/organization (Full-time staff other than management)	248 (48.2%)		Clerical specialist, e.g., research analysis, patent law	6 (1.2%)		Living-related and personal services & amusement services	6 (1.2%)
	Staff of company/organization (Other than full-time staff)	101 (19.6%)		Other	22 (4.3%)		Government, except elsewhere classified	3 (0.6%)
							Mining and quarrying of stone and gravel	2 (0.4%)
							Agriculture and forestry	1 (0.2%)

Main Findings

1. Actual Situation of Work Styles (from p.9)

- 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%.
- 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.
- A comparison of current utilization rates and future needs for work style initiatives shows a large gap between utilization rates and needs in “side job allowed by employer,” “workation allowed by employer” and “live and work at two locations; move to and work from suburb or countryside,” among others.

2. Evaluation and Needs (from p.18)

- We found that the majority of the respondents were not satisfied with their current work style, with 48.5% responding that they were “satisfied” (sum of “very satisfied” and “somewhat satisfied”).
- Workers who can choose where they work tend to have higher telework utilization rates and greater satisfaction with their work style.
- The group of respondents who were less satisfied tended to have higher intentions to leave their current employer and change jobs. Younger respondents also had higher intentions to change jobs.
- 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.
- 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%).

3. Values (from p.28)

- In terms of the ideal work style, “coming to office full time” (43.9%) was tied with “hybrid work” (42.8%).
- When asked if the work environment (the office or teleworking location) affects engagement with their company or work, 72.5% of the workers said it “affects.” A breakdown of the result by age group shows that the younger generation tends to think so more, with more than 80% of those in their 20s saying that it does.
- In terms of respondents’ anxieties and concerns about their future and career, the top answers were “I’m worried about continuing to work at my current job (e.g., performance, pay, employment)” (32.5%) and “I’m worried about not having enough money for my old age” (30.6%).
- In terms of respondents’ level of interest in engaging in non-desk work in the future, the sum of “interested” and “somewhat interested” gained 36.8%, outweighing the sum of “not interested” and “not very interested” (32.1%).

<PICK UP> Gap Between Utilization Rates and Needs for Work Style Initiatives and Office Layouts (from p.35)

1. Actual Situation of Work Styles

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

Percentage of teleworkers in Greater Tokyo at 52.8%, unchanged from previous year

Figure 1 shows the work styles of the target respondents by office location, categorizing the work styles into three groups: “teleworking full time,” “hybrid work,” and “coming to office full time.”

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 account for approximately 40% in regional cities.

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 (see Figure 2).

Full-time teleworkers accounted for only 2.7% of the total. The largest percentage of teleworkers were engaged in “hybrid work,” which combines teleworking and coming to the office.

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

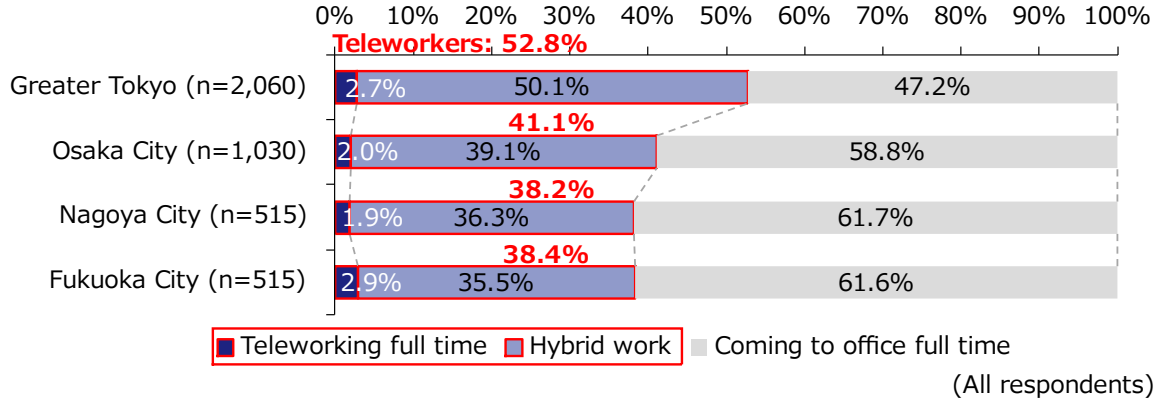
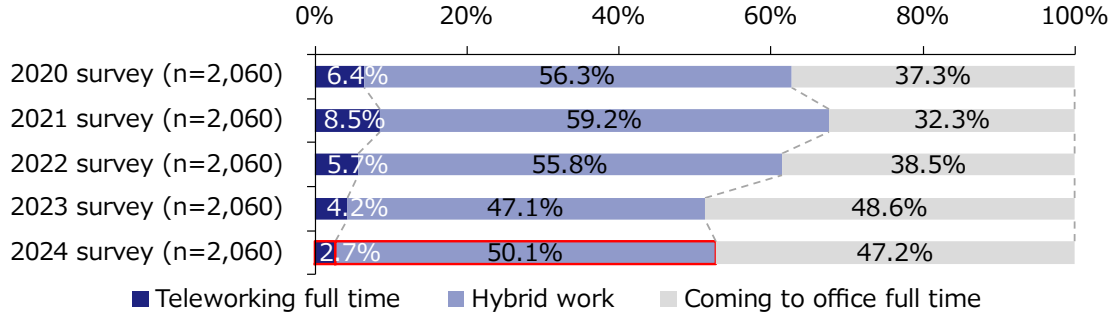


Figure 2: Coming to the Office or Teleworking – Greater Tokyo, Comparison over Time



Majority of teleworkers in Nagoya and Fukuoka telework less frequently

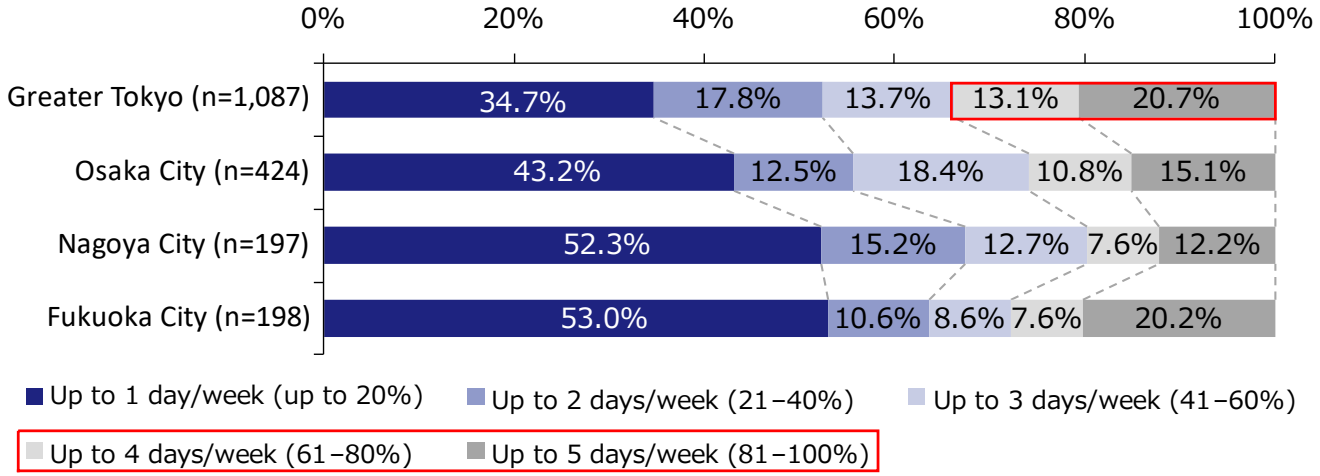
Figure 3 shows the frequency of telework by the teleworkers in Figure 1.

Compared to other regions, Greater Tokyo has relatively many workers teleworking frequently, such as “Up to 4 days/week (61–80%)” (13.1%) and “Up to 5 days/week (81–100%)” (20.7%).

In areas other than Greater Tokyo, the percentage of the low-frequency “Up to 1 day/week (up to 20%)” increases, exceeding 50% in Nagoya and Fukuoka.

*The average number of hours per week that respondents teleworked was converted to days based on a 5-day work week.

Figure 3: Telework Frequency – By Office Location (Teleworkers Only) (n=1,906))



(Teleworkers)

Greater Tokyo has more teleworkers working “only from home” than regional cities

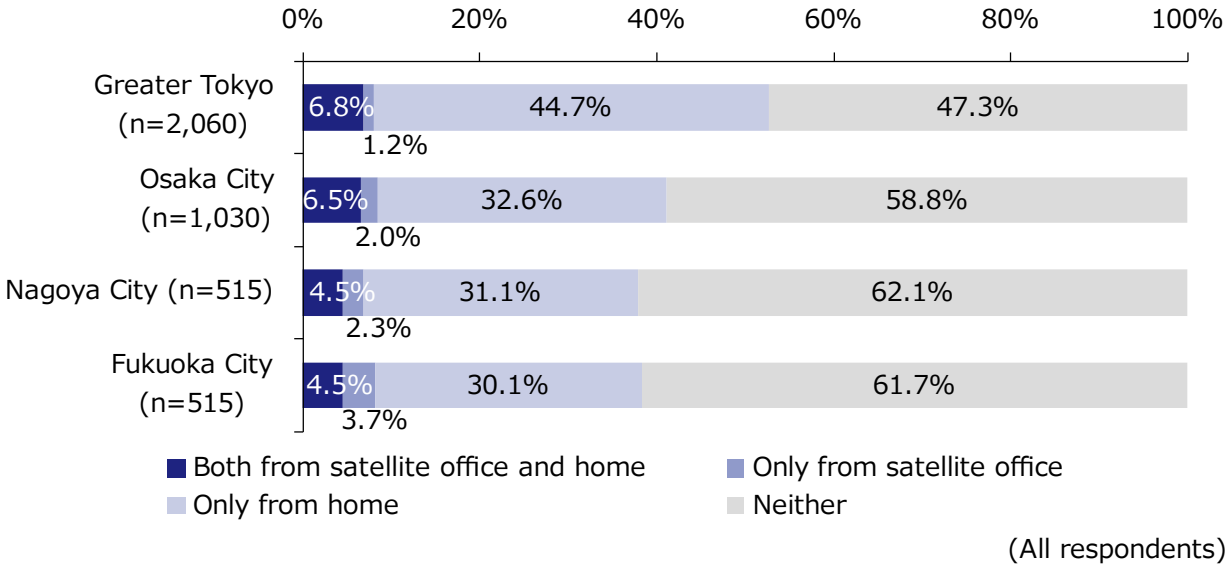
In terms of teleworking from a satellite office*1 or from home,*2 we found that the percentage of teleworking “only from home” in Greater Tokyo (44.7%) was more than 10 percentage points higher than in regional cities (Figure 4).

The percentage of those working from a satellite office (the sum of “working from both a satellite office and home” and “working only from a satellite office”) was 8.0% in Greater Tokyo, 8.5% in Osaka City, 6.8% in Nagoya City, and 8.2% in Fukuoka City. The percentages were about the same in all cities except for Nagoya. This indicates that teleworking from a satellite office has spread not only in Greater Tokyo, but also in major cities throughout Japan.

*1 Satellite office: A collective term for workplaces provided for teleworking apart from the worker’s regular office or home.

*2 We categorized respondents into four groups: “working from both a satellite office and home,” “working only from a satellite office,” “working only from home,” and “using neither.” Whether the respondent teleworked from another location was not taken into account.

Figure 4: Implementation Rate of Initiatives on Telework Locations – By Office Location



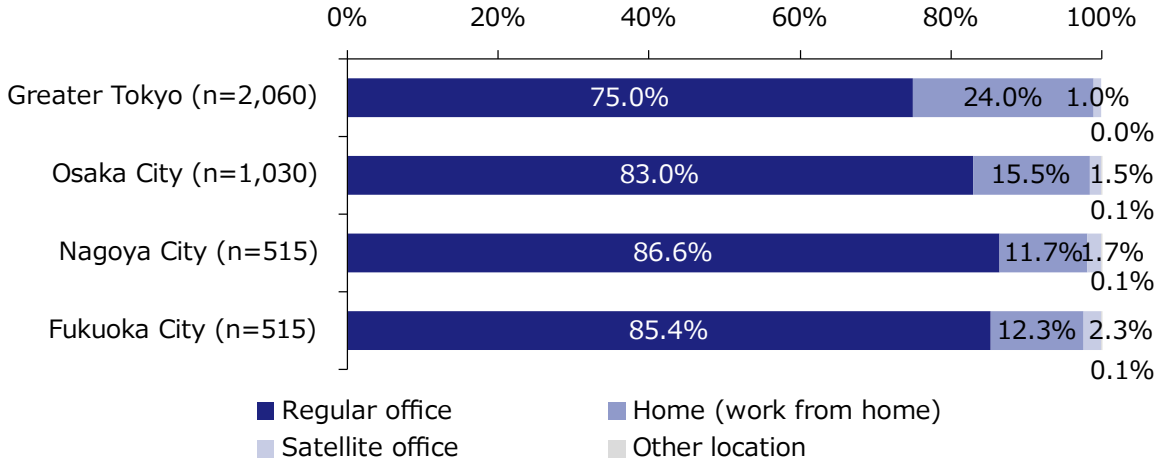
Working from home accounts for the majority of teleworking time

Figure 5 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.

The percentage of respondents working in their “regular office” was 75.0% in Greater Tokyo and more than 80% in other areas.

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



(All respondents)

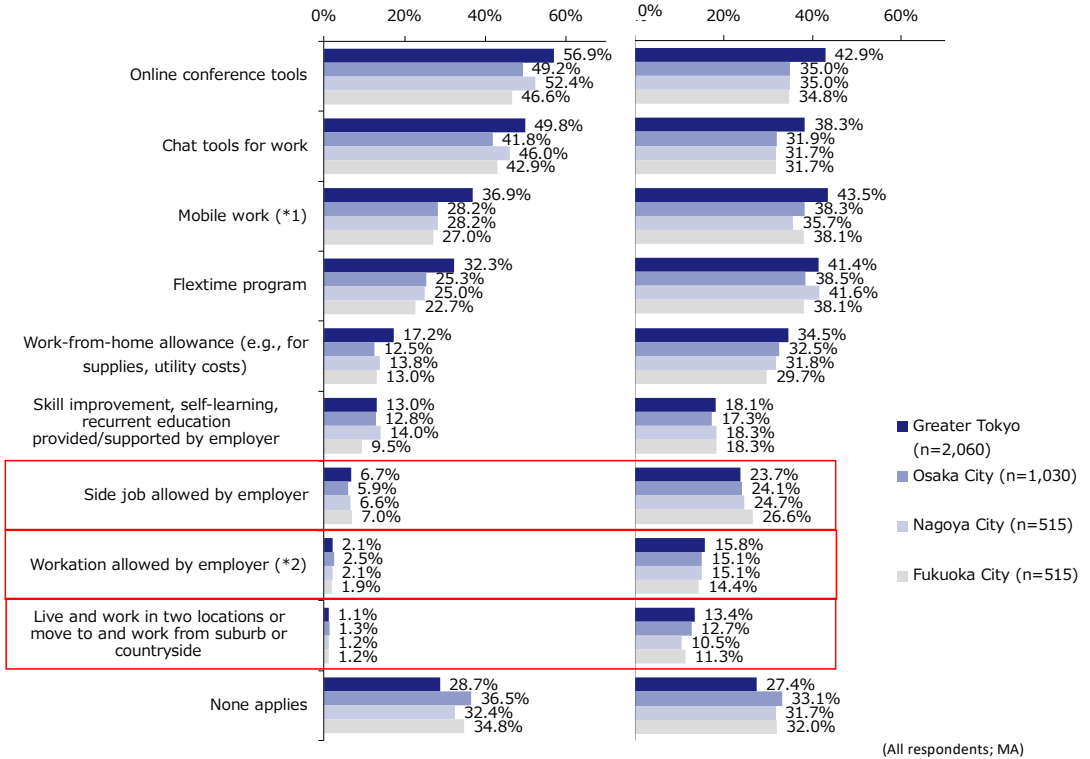
The need for “side jobs” and “workation” is greater than the actual situation, representing growth potential

We asked respondents about the work style initiatives they are currently using or implementing (usage rate) and those they wish to use or implement in the future (need) and compared the results (Figure 6).

In terms of the current usage rate, “Online conference tools” ranked highest in all areas. Initiatives adopted in connection with teleworking, such as “online conference tools” as well as “chat tools for work” and “mobile work,” which ranked high in all areas, tended to be adopted more in Greater Tokyo than in regional cities.

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,” which have not been widely adopted, show a large gap between the current situation and the needs in all areas, indicating that the adoption of these initiatives could be accelerated, driven by needs.

Figure 6: Usage Rate (Left) and Need (Right) for Work Style Initiatives – By Office Location



(All respondents; MA)

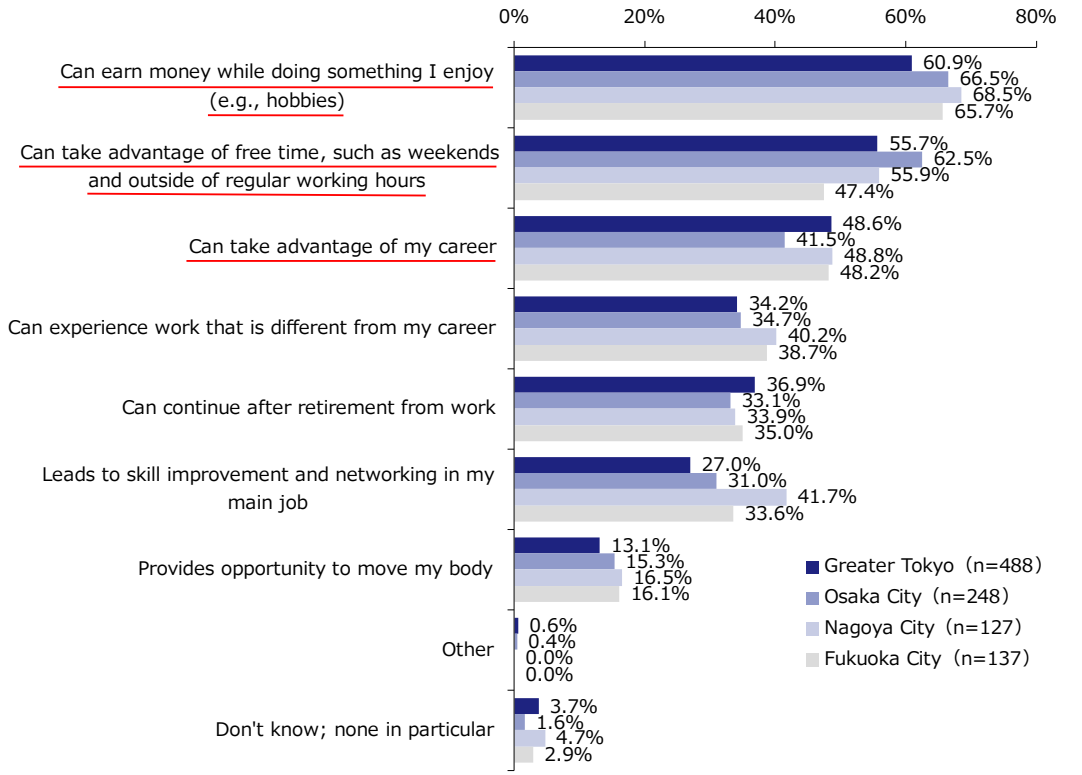
*1 Mobile work: A work style that allows workers to work outside of their designated office in a similar network environment to the office anytime, anywhere using a smartphone, mobile PC or other device. *2 Workation: A portmanteau of working vacation, meaning to work from a travel destination, etc.

Popular side jobs are those that allow workers to earn money while doing something they enjoy (e.g., hobbies) and those that take advantage of their free time

We asked the workers who replied that they wanted to have a “side job allowed by employer” in the work style initiatives (see Figure 6) what type of side job they would like to have (Figure 7).

The top answer was “can earn money while doing something I enjoy (e.g., hobbies),” which accounted for more than 60% in all areas. This was followed by “Can take advantage of free time, such as weekends and outside of regular working hours” and “Can take advantage of my career.”

Figure 7: Preferred Type of Side Job



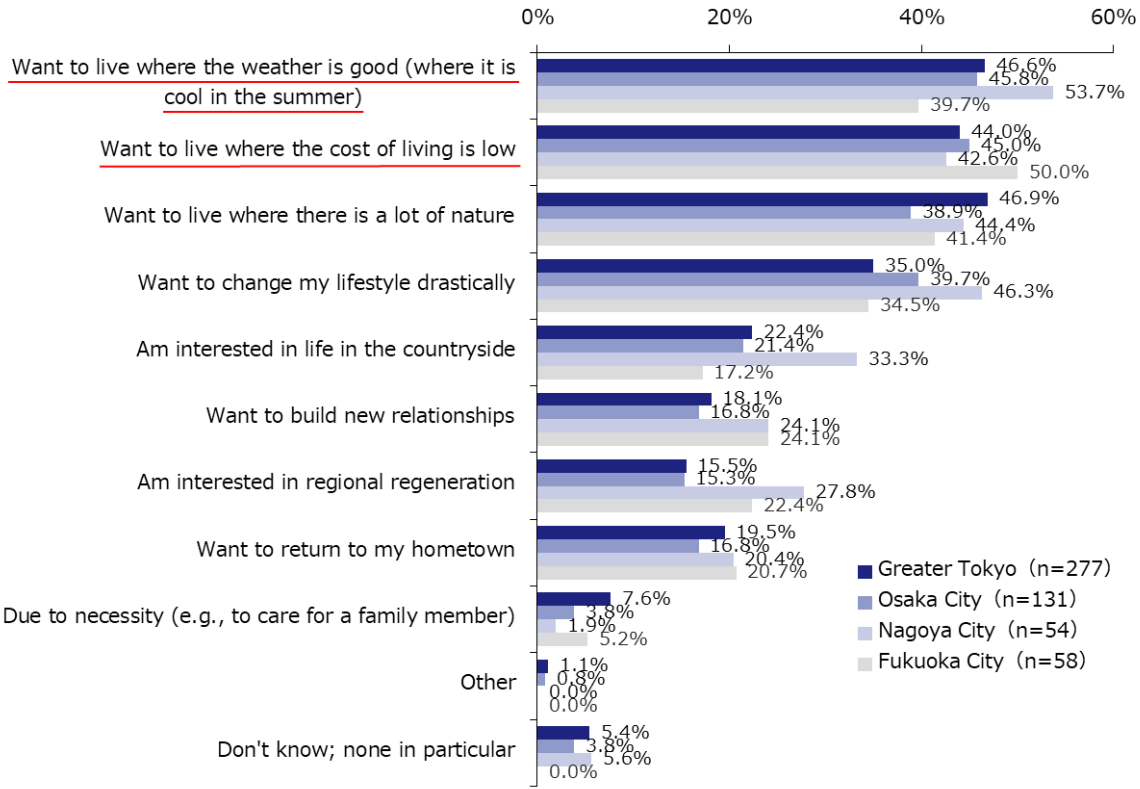
(Workers who replied that they wanted to have a "side job allowed by employer;" MA

Reasons for wanting to live in two locations or emigrating include wanting to live ”where the weather is good” and “where the cost of living is low”

We asked the workers who replied that they wanted to “live and work in two locations or move to and work from suburb or countryside” in the work style initiatives (see Figure 6) the reason for wanting to do so (Figure 8).

The top answers were “Want to live where the weather is good (where it is cool in the summer)” and “Want to live where the cost of living is low.” This may have been affected by factors such as the severe heat in the summer because of climate change and rising prices.

Figure 8: Reason for Wanting to Live in Two Locations or Moving to the Countryside



(Workers who replied that they wanted to "live and work in two locations or move to and work from suburb or countryside;" MA)

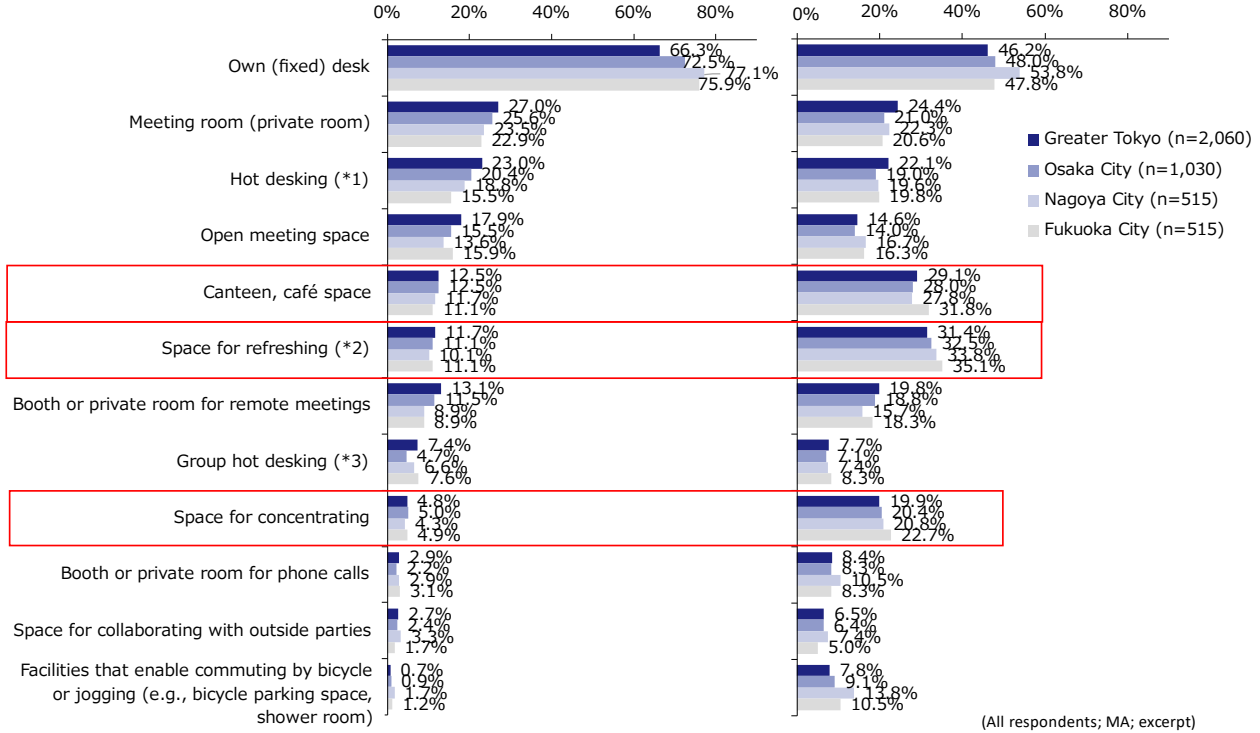
There is a large need for “canteen, café space” and “space for refreshing” in office layouts

We asked respondents about the layout within their regular office that they currently use (usage rate) and those they wish to use in the future (need) and compared the results (Figure 9).

In terms of current usage rates, while “own (fixed) desk” ranked top in all areas, its percentage was less than 70% in Greater Tokyo. The usage rate of “hot desking” was relatively high instead (23.0%). Office efficiency seems to be accelerating through hot desking in line with the degree of teleworking.

In terms of needs, there is a large gap between the usage rates and needs for “canteen, café space,” “space for refreshing,” and “space for concentrating” regardless of office location. In particular, there is a gap of about 20 points for “space for refreshing” in all areas, suggesting that the availability of such space has not kept pace with workers’ needs.

Figure 9: Usage Rate (Left) and Need (Right) for Layouts within the Office – By Office Location



(All respondents; MA; excerpt)

*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 can be chosen by individuals freely.

2. Evaluation and Needs

1. Satisfaction with Work Style
2. Ability to Choose Where to Work
3. Intention to Leave Current Employer and Change Jobs
4. Dissatisfaction and Issues with Current Work Style; Needs for the Office

48.5% of Workers Are Satisfied with Their Current Work Style: The Majority Are Dissatisfied.

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 48.5%, indicating that the majority of workers were not satisfied (Figure 10).

When plotting this result against telework status, the percentage of teleworkers who were “satisfied” was 61.5%, higher than the percentage of non-teleworkers (37.3%) (Figure 11).

Figure 10: Satisfaction with Work Style

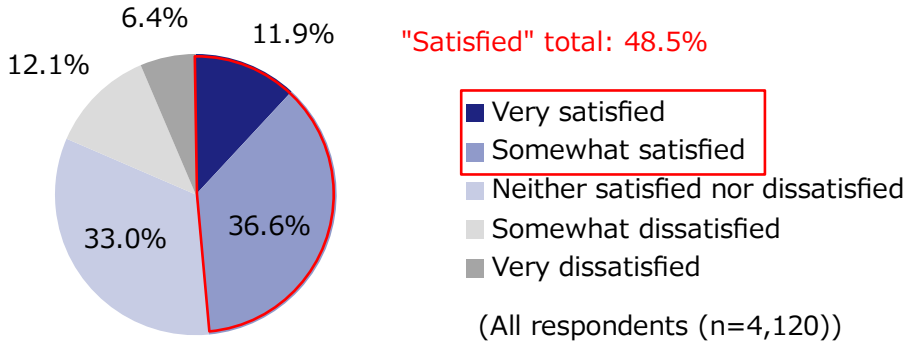
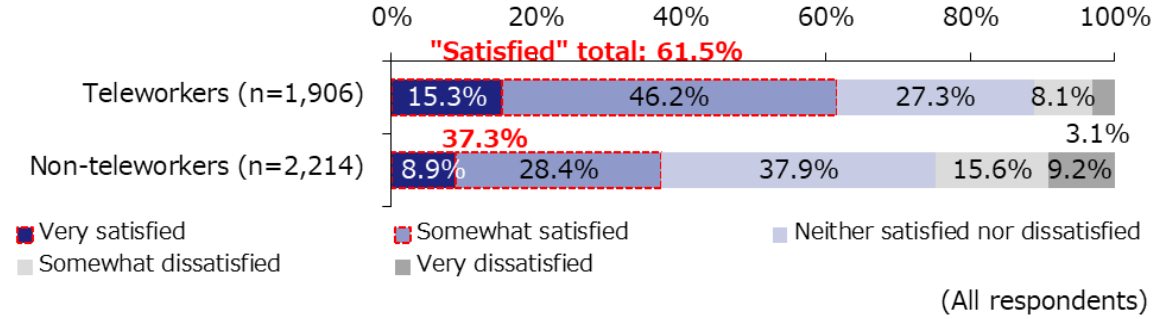


Figure 11: Satisfaction with Work Style – By Telework Status



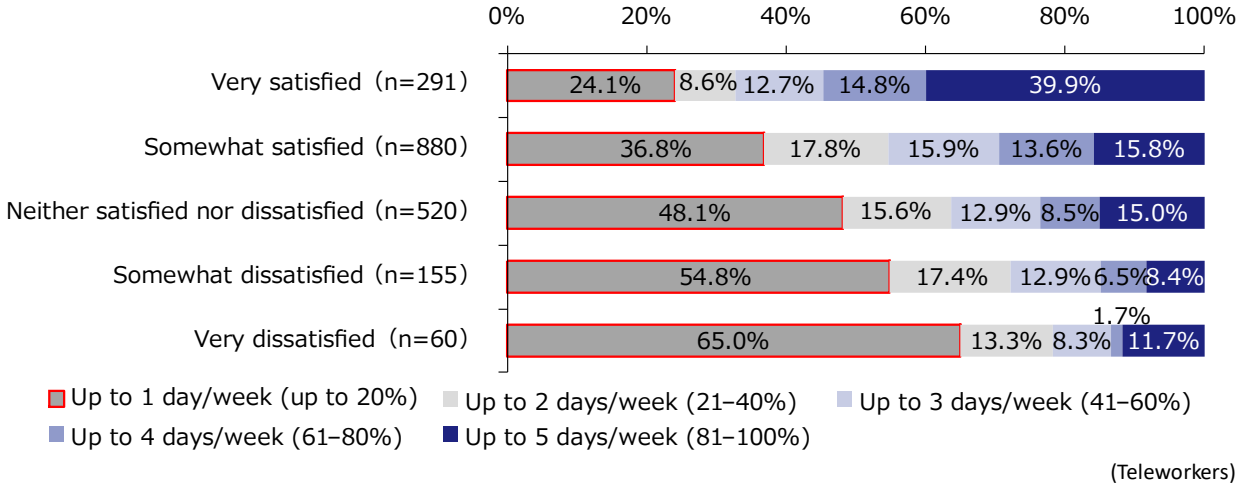
Teleworkers Less Satisfied with Their Work Style Telework Less Frequently

Although teleworkers had a relatively higher level of satisfaction with their work style, as shown in Figure 11, 11.2% of them said they were either “somewhat dissatisfied” or “very dissatisfied.”

Therefore, we plotted the frequency of teleworking against teleworker satisfaction and found that the group of teleworkers with a lower level of satisfaction had a higher percentage of “up to 1 day/week (up to 20%),” indicating that they teleworked less frequently (Figure 12).

This suggests that even if telework is available to workers, it may not lead to greater satisfaction if they can only telework at a low frequency, such as up to 1 day per week.

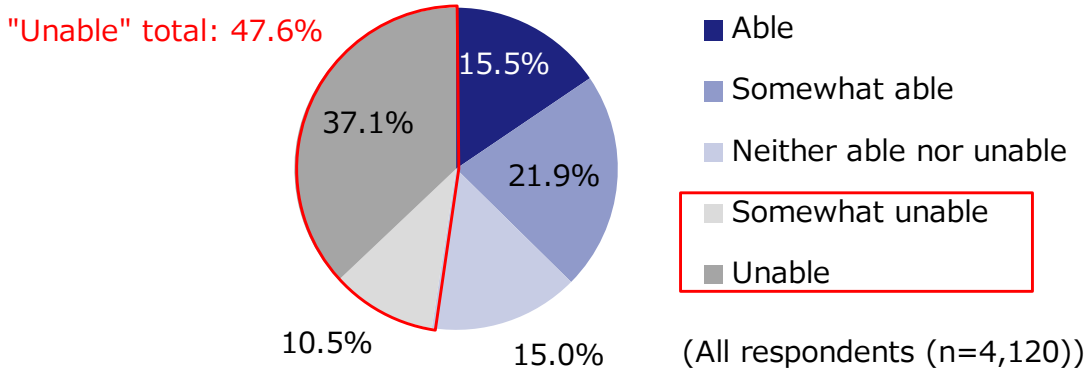
Figure 12: Telework Frequency – By Level of Satisfaction with Work Style



47.6% of Workers Are Not Able to Choose Where to Work

Only 37.4% of the respondents said they were usually able to choose where to work (sum of “Able” and “Somewhat able”), a lower percentage than those who said they were unable to choose where to work (sum of “Unable” and “Somewhat unable”: 47.6%) (Figure 13).

Figure 13: Ability to Choose Where to Work



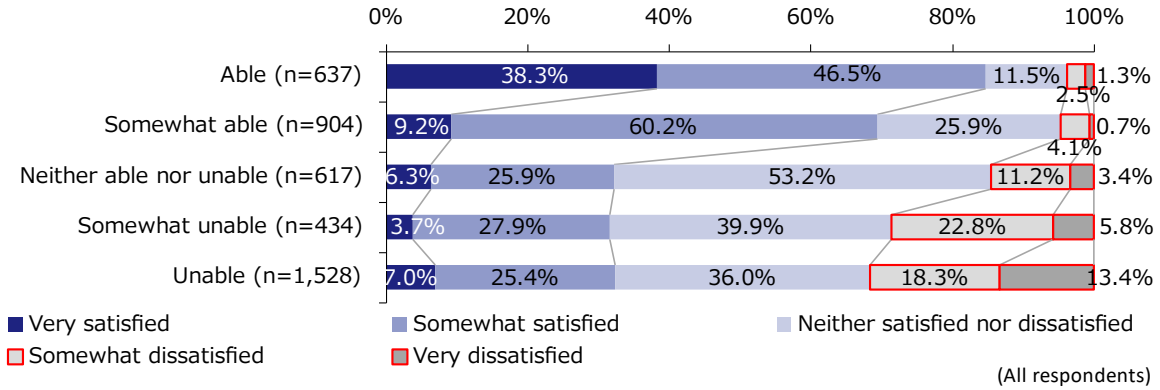
Workers Who Can Choose Where to Work Telework More and Are More Satisfied

When we plotted respondents' satisfaction with their current work style (see Figure 10) against their ability to choose where to work (see Figure 13), we found that workers who were unable to choose where to work tended to be more "dissatisfied" (Figure 14).

Similarly, when we plotted respondents' ability to choose where to work against whether they came to the office or teleworked (see Figure 1), we found that 90% of the group of respondents who were "unable" to choose where to work came to the office full time (Figure 15).

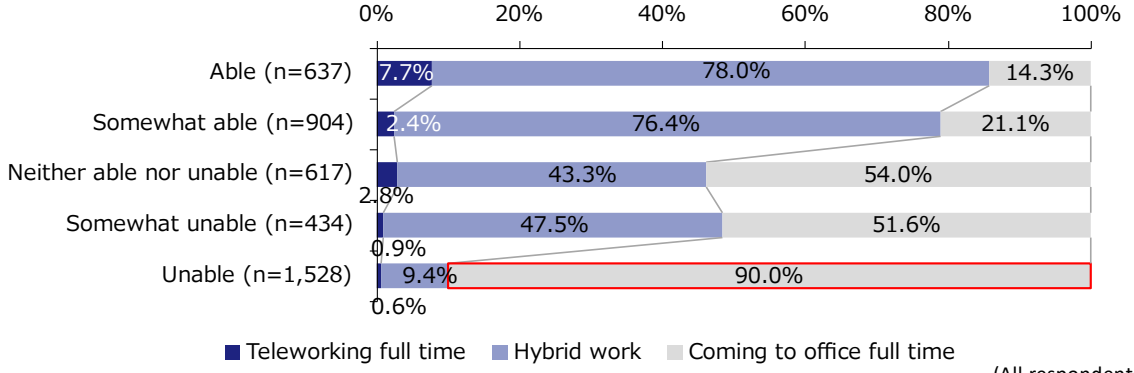
This suggests that workers who are able to choose where they work telework more and are more satisfied with their work style.

Figure 14: Satisfaction with Work Style – By Ability to Choose Where to Work



(All respondents)

Figure 15: Coming to the Office or Teleworking – By Ability to Choose Where to Work



(All respondents)

Less Satisfied Respondents Have Stronger Intentions to Change Jobs

When we asked respondents about their intention to leave their current employer and change jobs, the percentage of those with an intention to change jobs (sum of “have decided to change job/am looking for new job” and “want to change job if possible) was 32.0% (Figure 16).

When plotting this result against respondents’ satisfaction with their work style (see Figure 10), the group of respondents who were less satisfied tended to have stronger intentions to change jobs (Figure 17).

Among the “very dissatisfied” group, who are the least satisfied, the percentage of “have decided to change job/am looking for new job” alone amounted to 15.5%, and as much as 67.4% of them intended to change jobs, which includes “want to change job if possible.”

This suggests that resolving workers’ dissatisfaction with their work style and enabling them to work with greater satisfaction will lead to the retention of human resources.

Figure 16: Intention to Leave Current Employer and Change Jobs

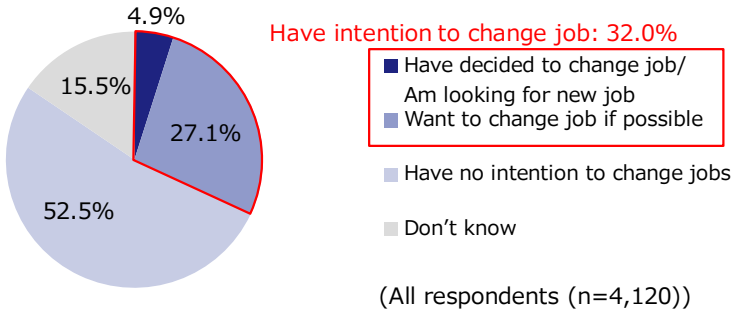
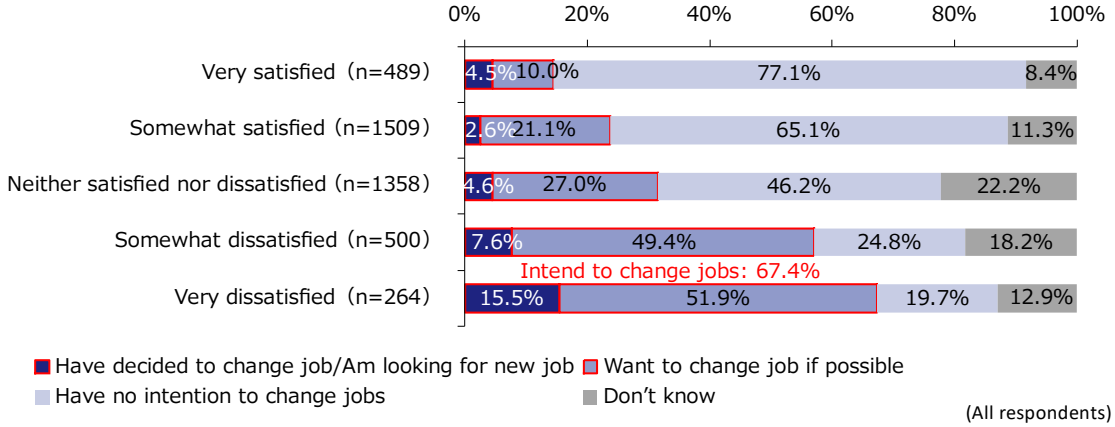


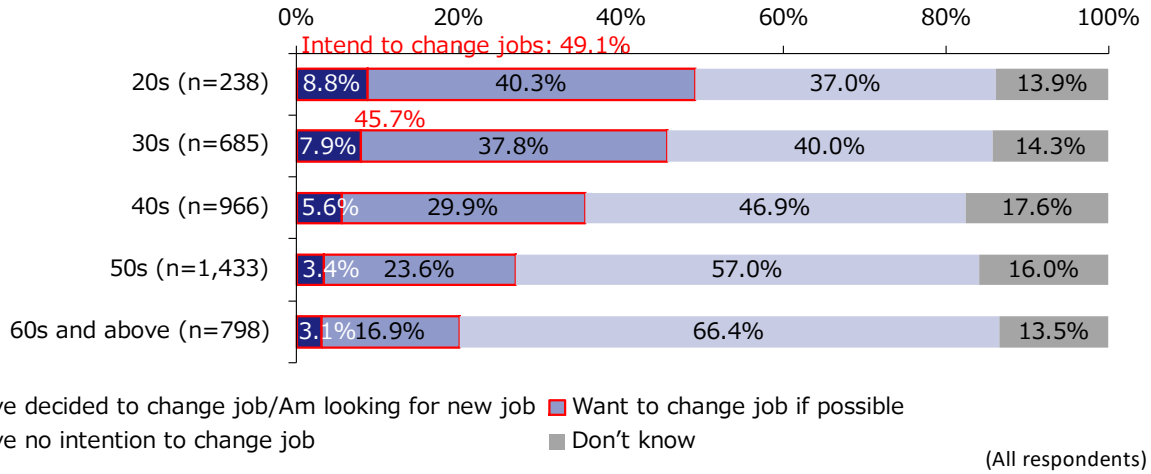
Figure 17: Intention to Leave Current Employer and Change Jobs – By Satisfaction with Work Style



The Younger the Age Group, the Higher the Intention to Change Jobs: 49.1% of Those in Their 20s Intend to Do So

When intentions to change jobs (see Figure 16) are plotted against age groups, the younger the age group, the higher the intention to change jobs. 49.1% of those in their 20s and 45.7% of those in their 30s had intentions to change jobs (Figure 18).

Figure 18: Intention to Leave Current Employer and Change Jobs – By Age Group



(All respondents)

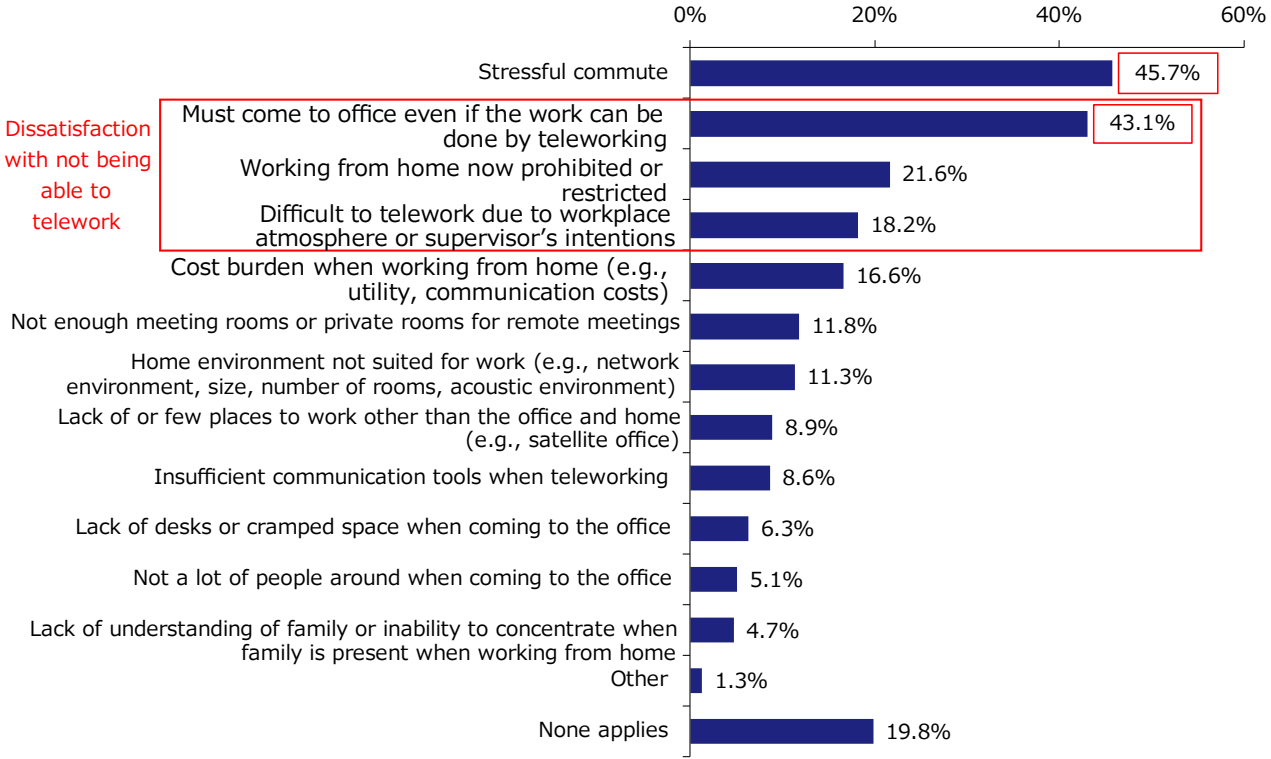
By Far the Greatest Dissatisfaction/Issue with Work Styles Are "Stressful Commute" and "Must Come to Office Even If the Work Can Be Done by Teleworking"

When we asked in Figure 10 the respondents who said 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 answers (Figure 19).

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 19: Dissatisfaction or Issue with Current Work Style



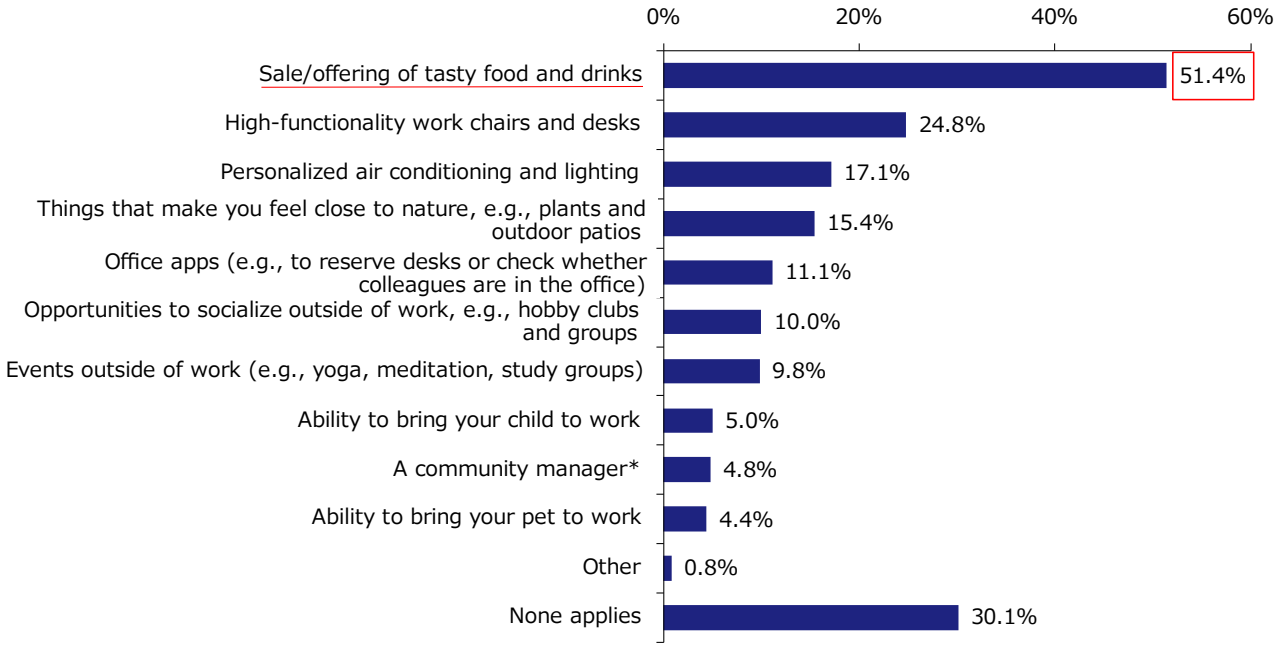
There Is Need for “Sale/Offering of Tasty Food and Drinks” in Office Operations

When we asked respondents what type of initiative they would prefer to see in a company’s office operations, the most popular answer was “sale/offering of tasty food and drinks” (51.4%) (Figure 20).

This was followed by “high-functionality work chairs and desks” (24.8%) and “personalized air conditioning and lighting” (17.1%), indicating that there is a strong need for functional comfort.

Adopting these initiatives could increase worker satisfaction.

Figure 20: 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 through office operations and event planning.

Only 12.8% of respondents “don’t want to come to any office”

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 21).

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 are going 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 21: Conditions of Office Where Workers Want to Come to Work

3. Values

1. The Ideal Work Style
2. Relationship between Work Environment and Engagement
3. Thoughts on the Future and Career

As the Ideal Work Style, “Coming to Office Full Time” Is Neck and Neck with “Hybrid Work,” Each at 40%

We asked respondents to choose the work style that most closely matched their ideal work style from three options: “teleworking full time,” “hybrid work,” and “coming to office full time,” and compared this to their current work style (see Figure 1) (Figure 22).

We found that workers’ ideal work styles were “coming to office full time” (43.9%) and “hybrid work” (42.8%) in equal measure, with “teleworking full time” (9.4%) in the minority. Compared to their current work style, “coming to office full time” was about 10 points lower as the ideal work style.

We then plotted the ideal work style against the current work style and found that the current and ideal work styles matched for more than 70% of respondents (Figure 23).

However, we also found that 20% of workers who currently come to the office full time would ideally want to telework, while 10.4% of hybrid workers would ideally want to come to the office full time.

Figure 22: Current Work Style (Top) and Ideal Work Style (Bottom)

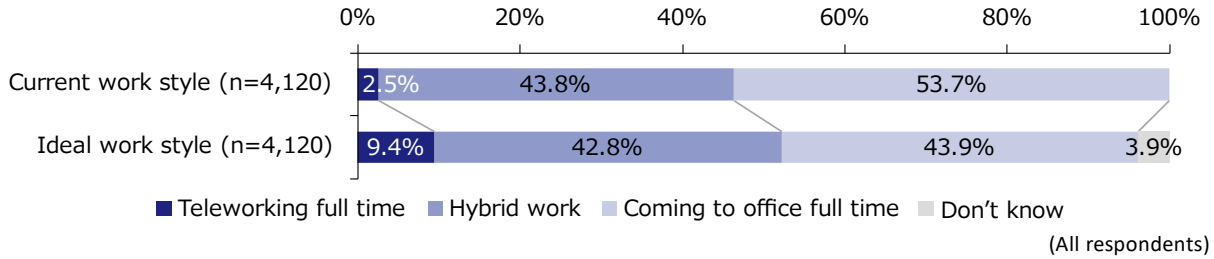
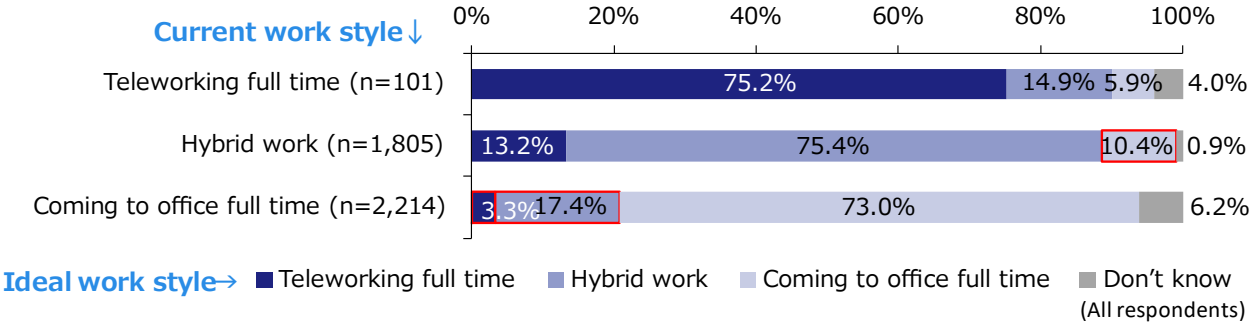


Figure 23: Ideal Work Style – By Current Work Style



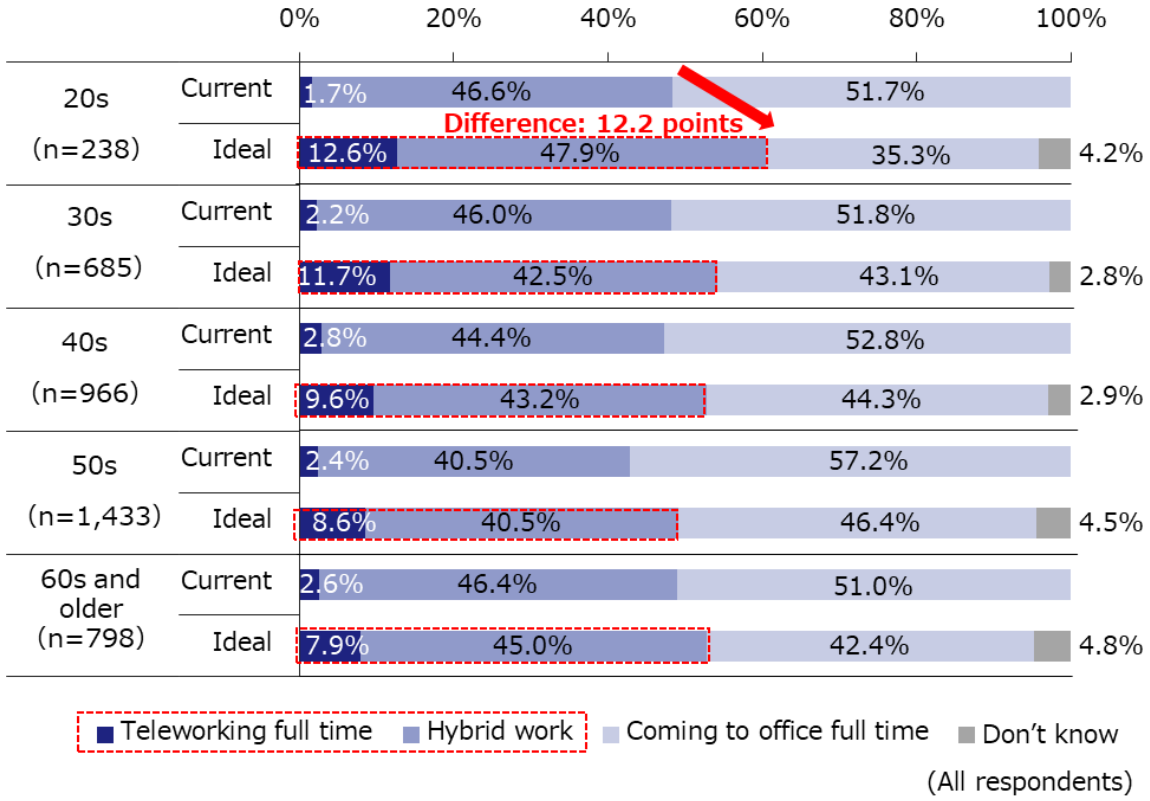
All Age Groups Ideally Want to Telework More Than They Currently Do

We compared respondents' current and ideal work styles (see Figure 22) by age group (Figure 24).

In all age groups, the percentage of teleworking (sum of "teleworking full time" and "hybrid work") as an ideal work style was higher than the percentage of current work style, indicating that a certain number of workers, regardless of age group, came to the office full time despite wanting to telework.

The difference was particularly large among those in their 20s, at 12.2 points.

Figure 24: Current and Ideal Work Style – By Age Group



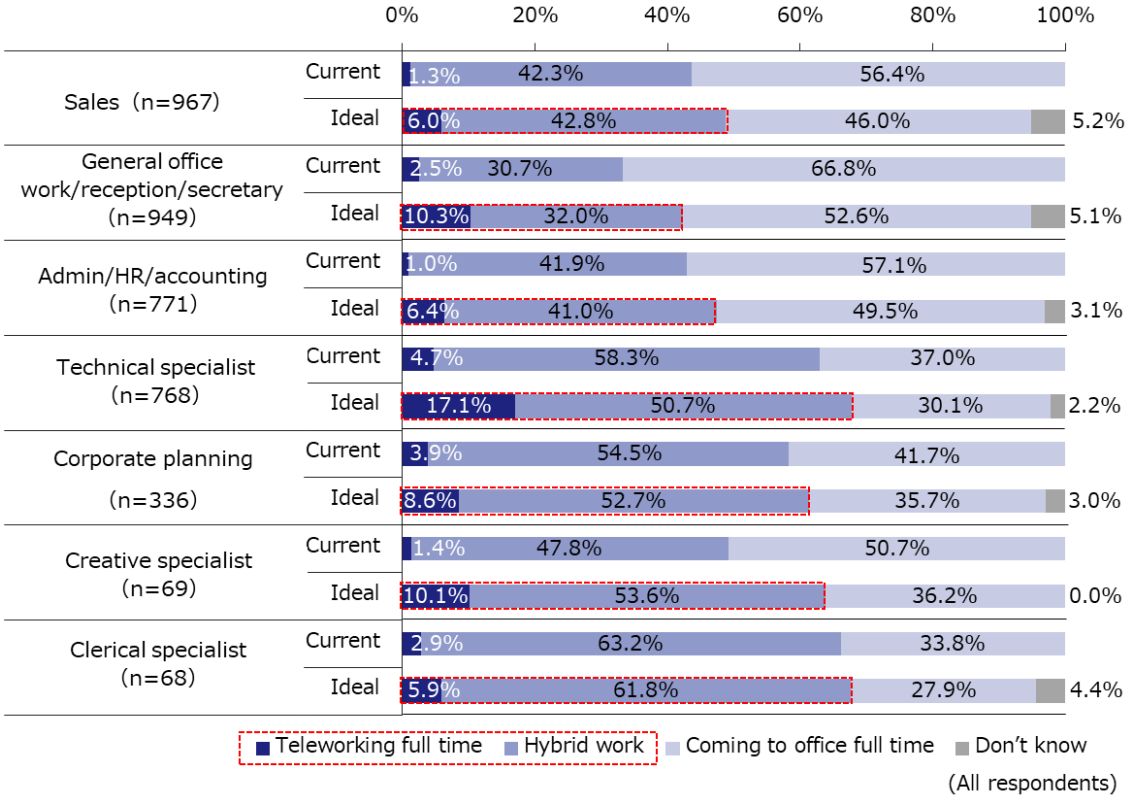
Job Categories with Large Gaps between Current and Ideal Work Styles Were “Creative Specialist” and “General Office Work/Reception/Secretary”

We plotted current and ideal work styles (see Figure 22) against job categories (Figure 25).

In all job categories, the percentage of teleworking (sum of “teleworking full time” and “hybrid work”) as an ideal work style was higher than the percentage of current work style, indicating that a certain number of workers, regardless of job category, came to the office full time despite wanting to telework.

The difference was particularly large among ”creative specialists” and “general office work/reception/secretary.”

Figure 25: Current and Ideal Work Style – By Job Category



72.5% of Workers “Believe Work Environment Affects Engagement,” Younger Group More So

When we asked respondents whether they thought the work environment (the office or telework location) affected their engagement with their company and their work, 72.5% of the workers said that it ”affects” (sum of “affects very much” and “affects somewhat”) (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). The age group thinking so the least were those in their 50s (66.3%).

Figure 26: Whether the Work Environment Affects Engagement

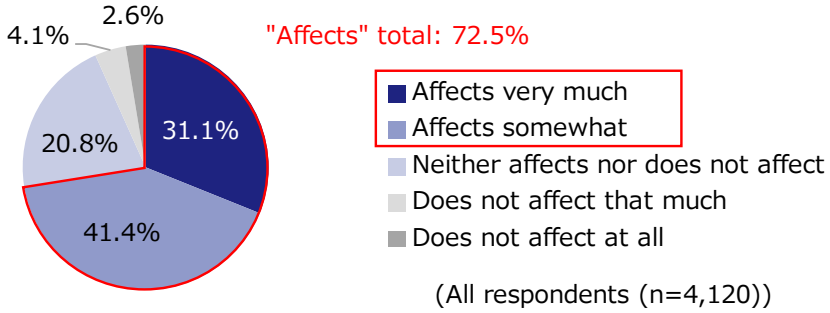
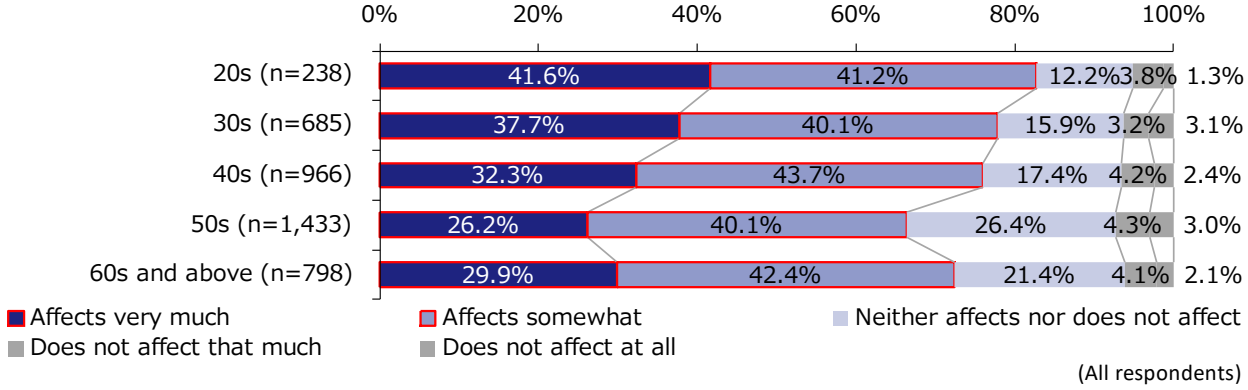


Figure 27: Whether the Work Environment Affects Engagement – By Age Group

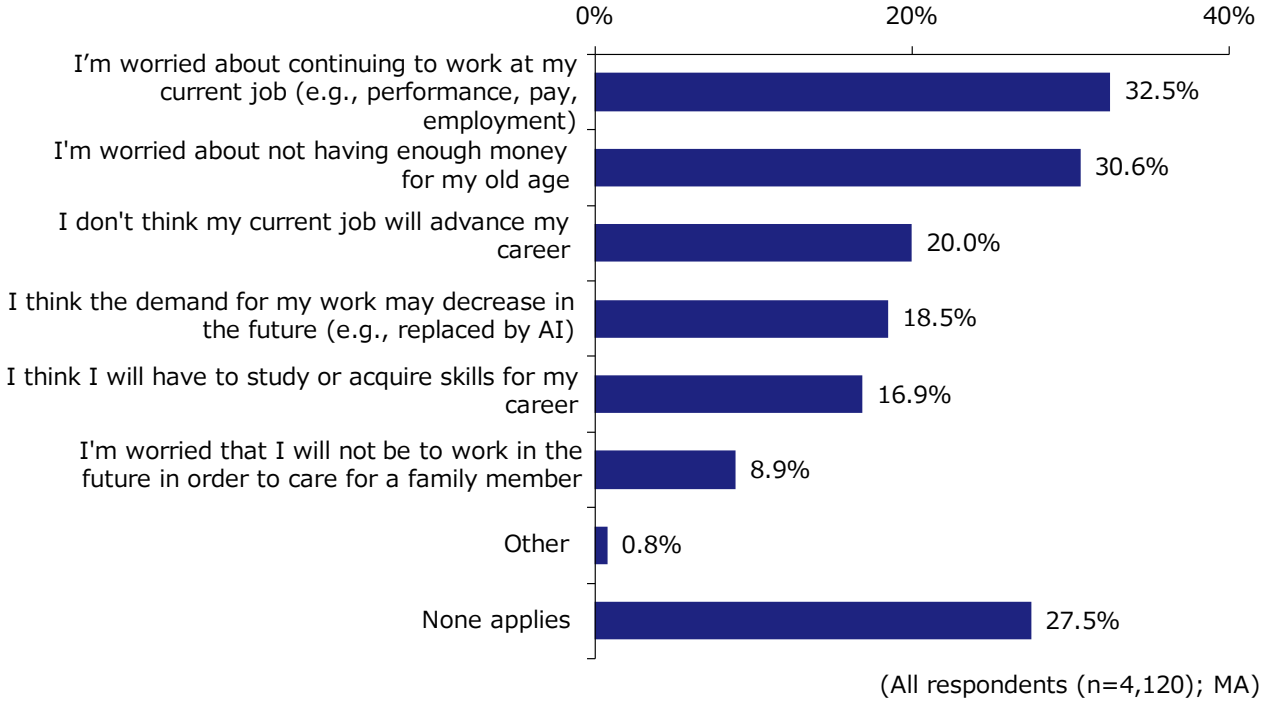


Top Anxiety or Concern About the Future and Career: “Worried about Continuing to Work at My Current Job”

Figure 28 shows respondents’ anxieties and concerns about their future and career.

The top answers include “I’m worried about continuing to work at my current job (e.g., performance, pay, employment)” (32.5%) and “I’m worried about not having enough money for my old age” (30.6%).

Figure 28: Anxiety or Concern About the Future and Career

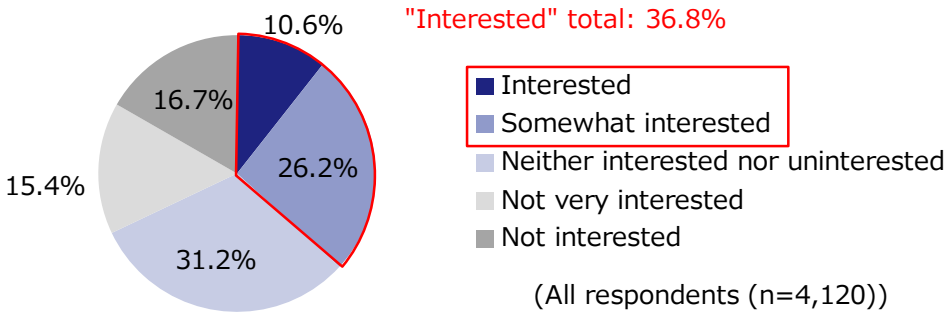


Nearly 40% of Workers Are “Interested” in Engaging in Non-desk Work

When we asked respondents to rate their level of interest in engaging in non-desk work in the future on a five-point scale, the sum of “interested/somewhat interested” was 36.8%, outweighing the sum of “not interested” and “not very interested” (32.1%) (Figure 29).

We plan to analyze the result of Figure 29 in more detail in a topic report to be released in the near future.

Figure 29: Level of Interest in Engaging in Non-desk Work in the Future



[Full text of the question]

More people are working past the age of 60 due to a declining working population and increased healthy life expectancy. Demand for labor is expected to increase for non-desk work,* in particular, which is facing a severe shortage of workers compared to desk work that is being streamlined by AI and other technologies. Wages are expected to improve as demand increases, with the United States experiencing a phenomenon in which the wages of some non-desk workers and desk workers have reversed.

Given these social conditions, are you interested in engaging in non-desk work in the future? Please select one that best describes your thoughts.

*Non-desk work: Jobs that involve working in various sites other than at a desk. Includes a wide range of jobs such as construction workers, nursing service workers, security guards, janitors, drivers, delivery personnel, superintendents, merchandise sales clerks, restaurant workers, manufacturing workers such as in factories, medical personnel such as doctors and nurses, pilots/drivers of ships, airplanes and trains, and workers in agriculture, forestry, and fishery.

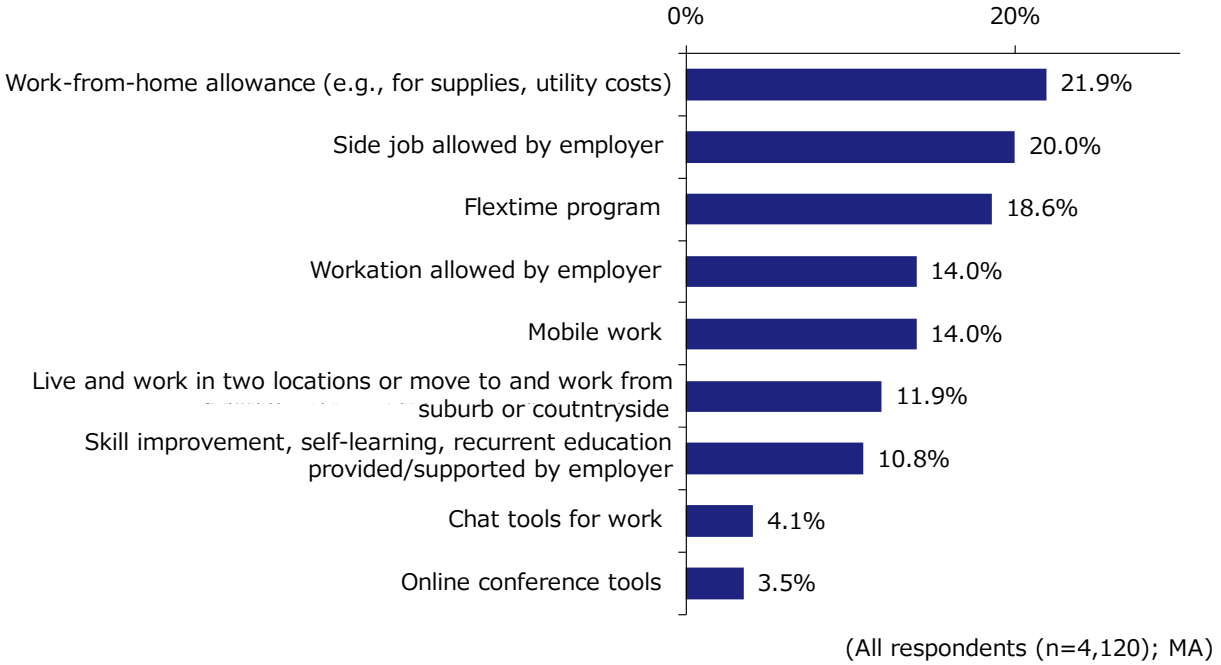
<PICK UP>
The Gap Between Usage Rates and Needs in Work Style Initiatives and Office Layouts

Work Style Initiatives with a Large Gap (Currently Not Used but Would Like to Use) Include “Work-from-home Allowance” and “Side Jobs”

Figure 30 shows the percentage of workers who ”do not currently use” but “would like to use” each of the work style initiatives in the future (see Figure 6). A higher percentage means that “current usage status does not meet usage needs,” or in other words, the gap is large, and there is room for improvement.

The largest gap was in “work-from-home allowance (e.g., for supplies, utility costs),” which 21.9% of workers wish to use but cannot. This was followed by “side job allowed by employer” (20.0%) and “flextime program” (18.6%).

Figure 30: Gap Between Usage Rates and Needs in Work Style Initiatives



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

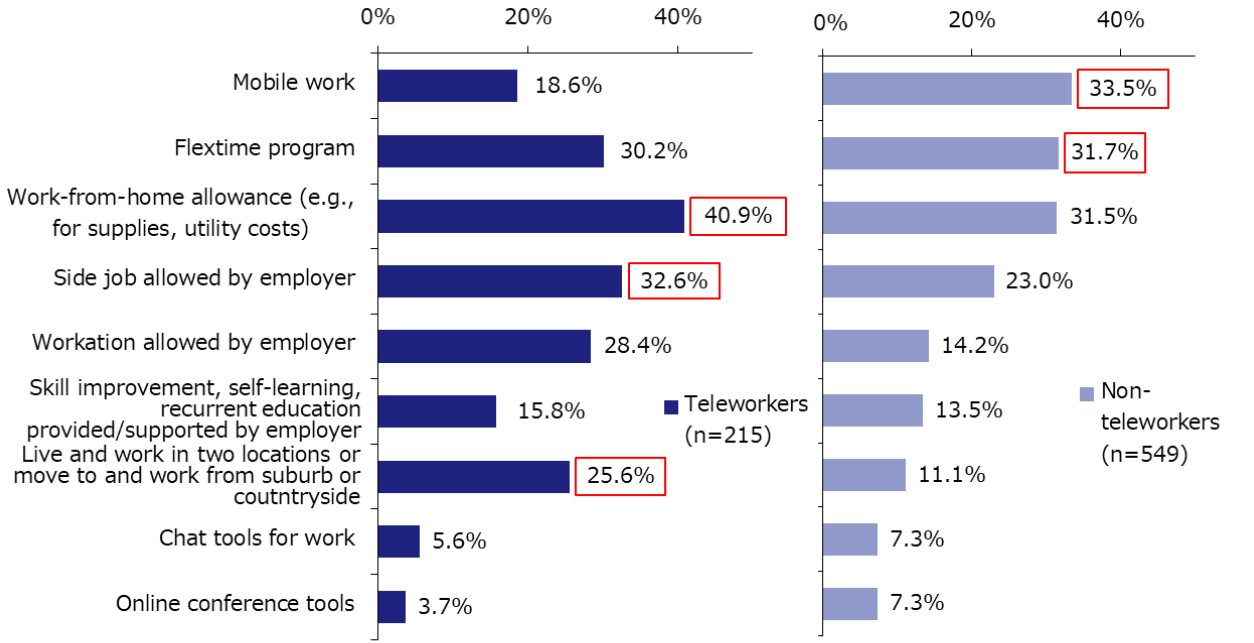
A Gap in “Work-from-home Allowance” and “Live/work in Two Locations” Among Dissatisfied Teleworkers

The gap between the usage rates and needs of work style initiatives, as shown in Figure 30, may have led to worker dissatisfaction. Therefore, we focused on workers who were dissatisfied with their work style and compared teleworkers to non-teleworkers to see which initiative each group of workers felt a gap in (Figure 31).

We found that teleworkers had particularly large gaps in “work-from-home allowance (e.g., for supplies, utility costs)” (40.9%) and “side job allowed by employer” (32.6%). Compared to non-teleworkers, the gap was large for “live and work in two locations or move to and work from suburb or countryside” (25.6%). This initiative has a large gap especially among teleworkers.

On the other hand, non-teleworkers showed particularly large differences in “mobile work” (33.5%) and “flextime program” (31.7%).

Figure 31: Gap Between Usage Rates and Needs in Work Style Initiatives – By Telework Status



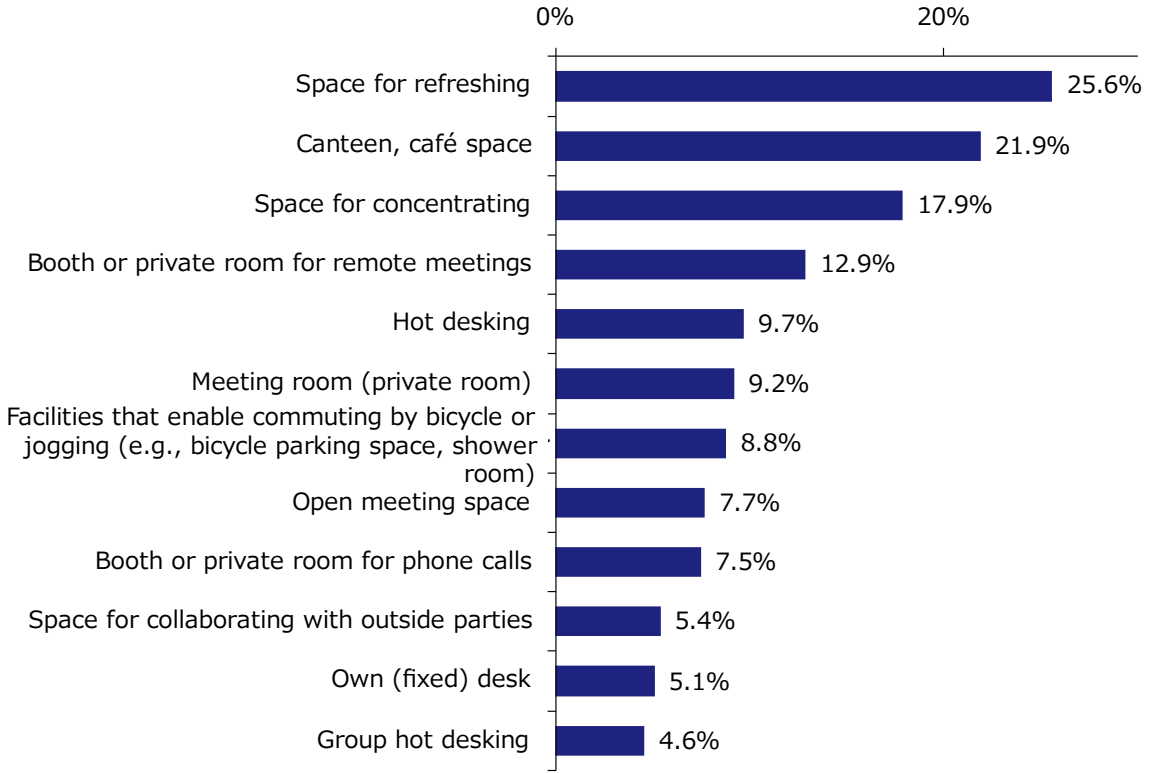
(Workers who are "(somewhat/very) dissatisfied" with their current work style (n=764); MA)
The listing order is the same as for all respondents.

Office Layouts with a Large Gap (Currently Not Used but Would Like to Use) Include “Space for Refreshing” and “Canteen, café space”

Figure 32 shows the percentage of workers who ”do not currently use” but “would like to use” each of the office layouts in the future (see Figure 9). A higher percentage means that “current usage status does not meet usage needs,” or in other words, the gap is large, and there is room for improvement.

The largest gap was in “space for refreshing,” which 25.6% of workers wish to use but cannot. This was followed by “canteen, café space” (21.9%) and “space for concentrating” (17.9%).

Figure 32: Gap Between Usage Rates and Needs in Office Layouts



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

A Large Gap in “Hot Desking” Among Dissatisfied Non-teleworkers

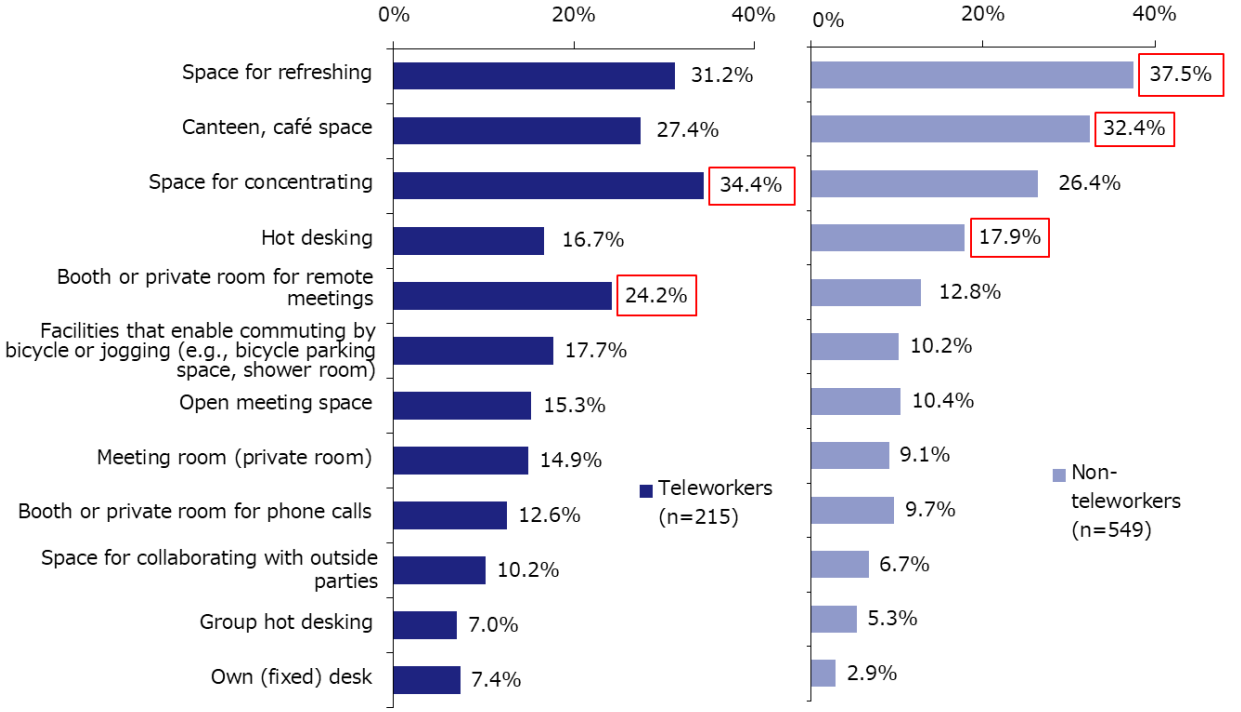
The gap between the usage rates and needs for office layouts, as shown in Figure 32, may have led to worker dissatisfaction. Therefore, we focused on workers who were dissatisfied with their work style and compared teleworkers to non-teleworkers to see which layout each group of workers felt a gap in (Figure 33).

Teleworkers had larger gaps than non-teleworkers in “space for concentrating” (34.4%) and “booth or private room for remote meetings” (24.2%), suggesting that while they require ease of working when they come to the office during hybrid work, the availability of such layouts has not kept pace with their needs.

On the other hand, non-teleworkers had larger gaps than teleworkers in “space for refreshing” (37.5%) and “canteen, café space” (32.4%), suggesting that while they require comfort and wellness features in offices, as they come to the office frequently, the availability of such layouts has not kept pace with the needs.

The gap for “hot desking” (17.9%) was also greater than among teleworkers. There may be a need to choose where to work flexibly and not just work at a fixed desk when they come to the office.

Figure 33: Gap Between Usage Rates and Needs in Office Layouts – By Telework Status



(Workers who are "(somewhat/very) dissatisfied" with their current work style (n=764); MA)
The listing order is the same as for all respondents.