

Evolving Workforces

# Japan Office Occupier Survey 2025

REPORT

CBRE RESEARCH  
DECEMBER 2025

CBRE



# Summary

Companies in Japan are increasing investment in office environments to attract and retain talent, but discrepancies are emerging between worker preferences and company initiatives regarding flexible working styles and office locations.

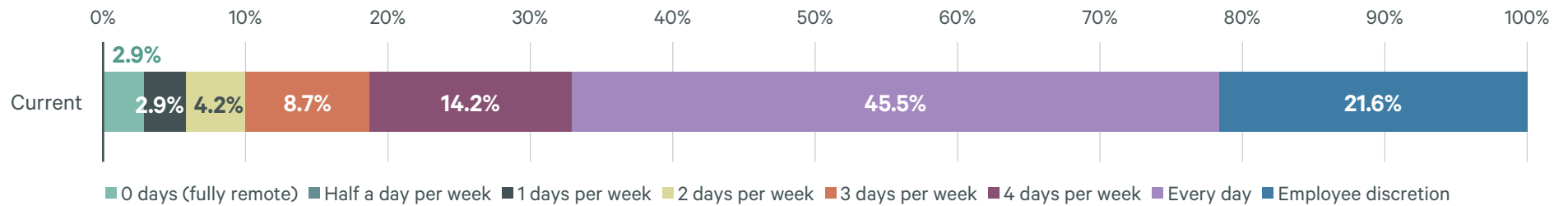
- CBRE's July 2025 Survey on office usage found that most managerial-level respondents prefer full-time office attendance from their employees. However, while the nationwide office attendance rate is 72.2%, employees across all generations want to reduce their office attendance frequency in the future.
- In a repeat of last year's results, the top risk companies face in their business activities is "securing human resources". Amid this environment, "recruitment advantages" has emerged as another key factor prioritized when developing office strategies, alongside the category's other long-time leaders, "comfort", "cost", and "location".
- For employees, the criteria most highly prioritized in an office are "comfort", "location", "ample floor space", and "earthquake resistance/BCP". Among younger generations, a relatively higher percentage of respondents indicated a preference for added value in terms of buildings with auxiliary facilities such as "lounges, cafes, and cafeterias" and space for events, reflecting their preference for offices that can facilitate interactions with other workers.
- Many companies are planning to increase capital investment in improving or upgrading office environments. The survey results revealed that companies that have carried out office overhauls have had more success in hiring than those that have not.
- While fixed seating plans make up over half of current workplace layouts, a significant number of companies are planning to introduce flexible working styles, such as Activity-based Working (ABW). Among employees, while those preferring flexible office layouts look certain to increase in the future, the majority still prefer fixed seating.
- When comparing initiatives implemented by management in order to attract and retain talent with the factors prioritized by workers and job seekers, significant discrepancies can be observed in areas pertaining to working styles and office location, such as flexibility in working hours/ location, as well as offices in locations with excellent transportation access
- Companies that have implemented measures to enable more flexible work styles have had greater success in recruitment. CBRE believes companies must consider both the hard and soft aspects of the work environments they offer to effectively market themselves as attractive places to work.

01

# Office Use

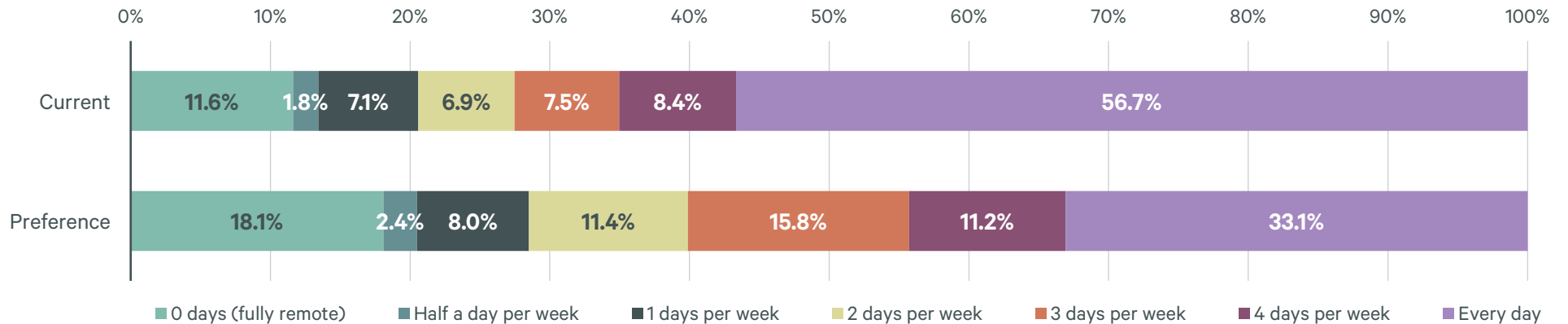
Office attendance and comparison of management requirement vs. actual worker attendance:  
**The most common response among managerial respondents is a preference for full attendance. In terms of actual worker attendance, full attendance is also most common. In terms of future preferences, “every day” falls below its current levels, while “zero days (fully remote)” and “three days” are higher.**

**Figure 1: [Management] Management requirements of days spent in the office per week**



n=310

**Figure 2: [Employees] Actual and future preferences of days spent in the office per week**

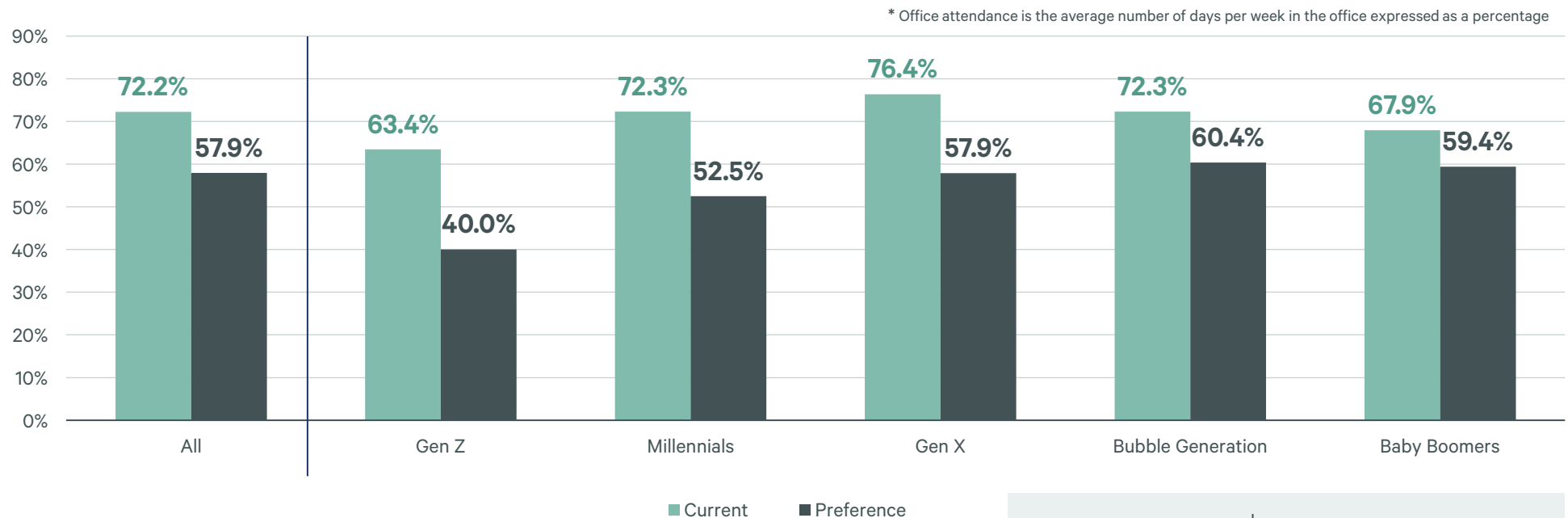


n=1,161

Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

Office attendance by generation (current levels and preferences):  
**Gen Z attendance is the lowest among all generations, while Gen X has the highest.**  
**All generations would prefer to attend the office less frequently than they currently do.**

**Figure 3: [Employees] Office attendance \* by generation**



All n=1,161, Gen Z n=32, Millennials n=133, Gen X n=346, Bubble Generation n=368, Baby Boomers n=282

Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

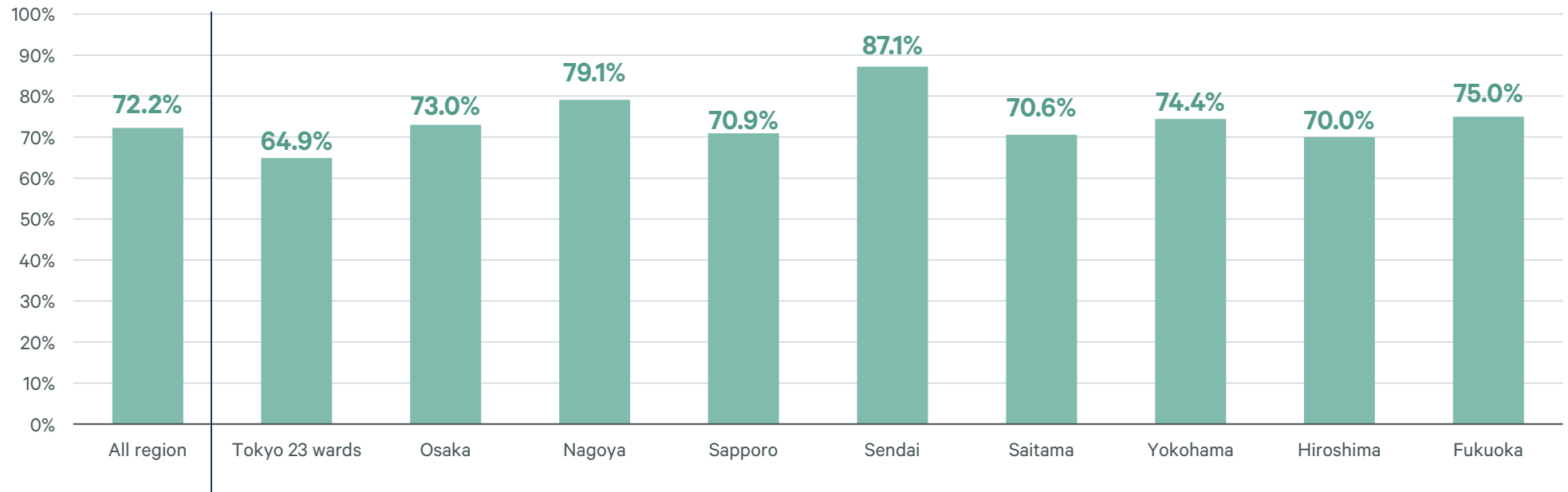
The generations are defined as shown on the right  
 Age is at time of survey

- Gen Z: Up to 30 years old**
- Millennials: 31-42 years old**
- Gen X: 43-53 years old**
- Bubble Generation: 54-60 years old**
- Baby Boomers: 61 years old +**

Office attendance by office location:

**The nationwide average office attendance rate is 72.2%, with the highest rate recorded in Sendai at 87.1%, and the lowest in the Tokyo 23 wards at 64.9%.**

**Figure 4: 【Employees】 Office attendance by office location**



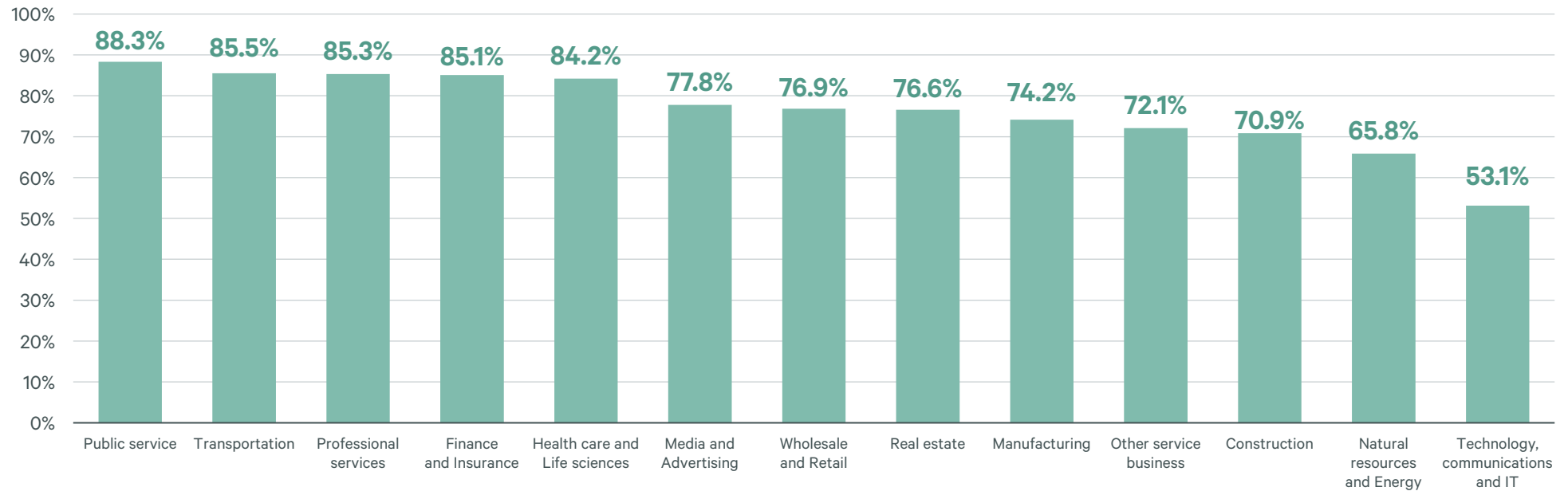
All region n=1,161、Tokyo 23 wards n=374、Osaka n=97、Nagoya n=77、Sapporo n=33、Sendai n=35、Saitama n=18、Yokohama n=61、Hiroshima n=16、Fukuoka n=32

Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

Office attendance by business sector:

**The highest office attendance rates are in the public sector, followed by “transportation”, “professional services”, and “finance and insurance”. The lowest rates are registered by workers in the “technology, communications, and IT” sector.**

**Figure 5: 【 Employees 】 Office attendance by business sector**



Public service n=53、Transportation n=51、Professional services n=15、Finance and Insurance n=97、Health care and Life sciences n=19、Media and Advertising n=18、Wholesale and Retail n=115、Real estate n=41、Manufacturing n=338、Other service business n=94、Construction n=46、Natural resources and Energy n=24、Technology and communications n=243

Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

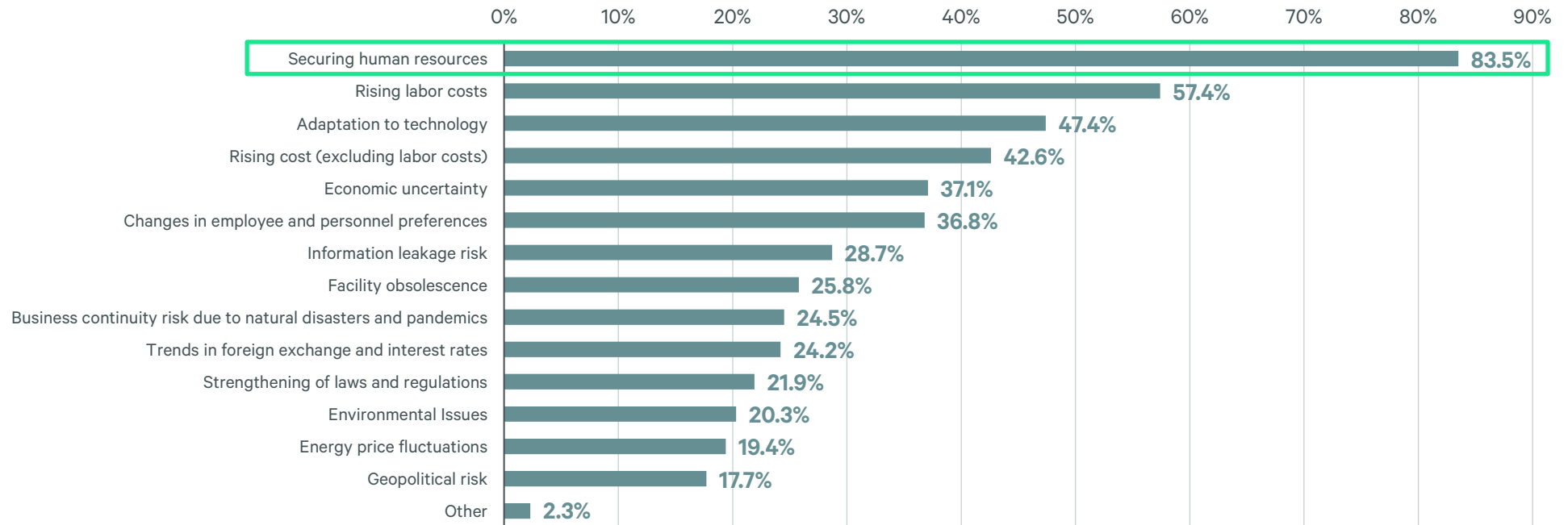
02

Criteria prioritized in office  
selection and popular office areas

Projected future business risks:

**“Securing human resources” is the top business risk that companies face, with this answer far outstripping all other items.**

**Figure 6: [Management] Projected future business risks**



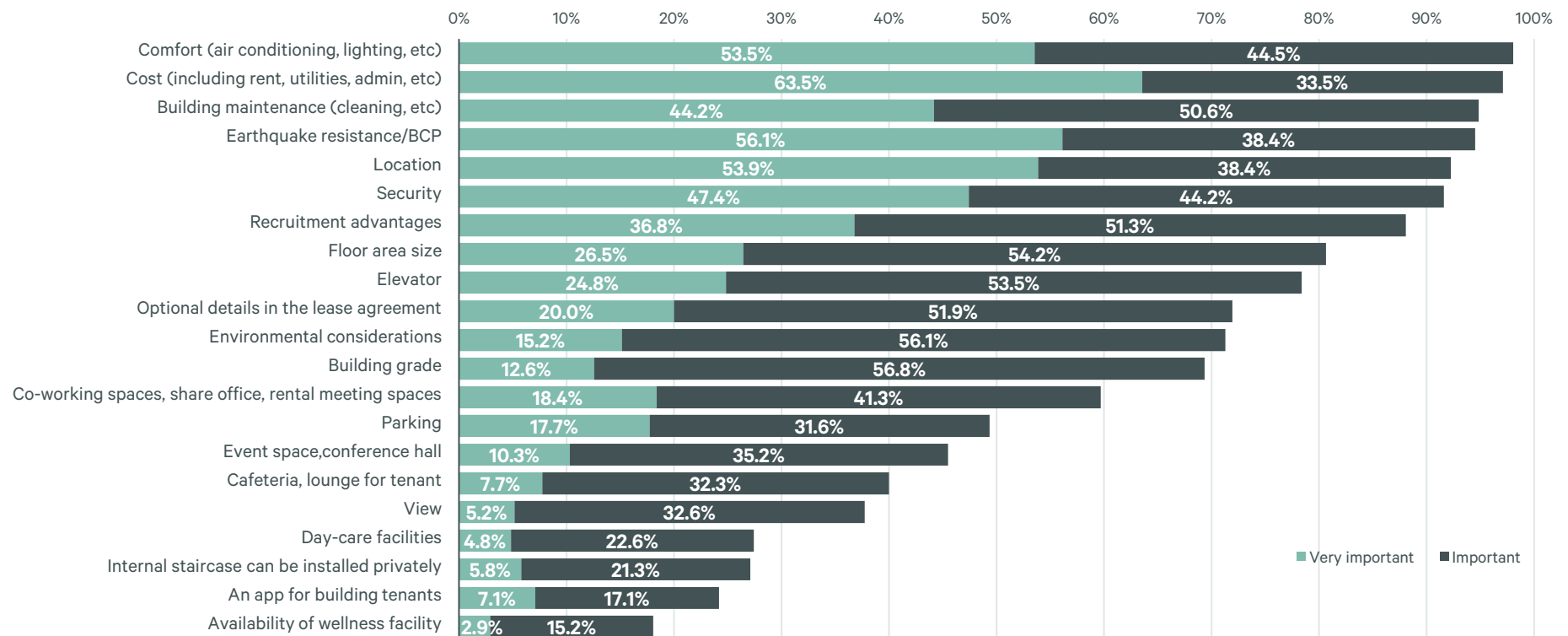
Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

n=310

Key criteria for office strategies:

“Comfort”, “cost”, “building maintenance”, “earthquake resistance/BCP”, “location”, and “security”, all of which have traditionally been priority criteria, are now joined by “recruitment advantages”.

Figure 7: 【 Management 】 Key criteria for office strategies



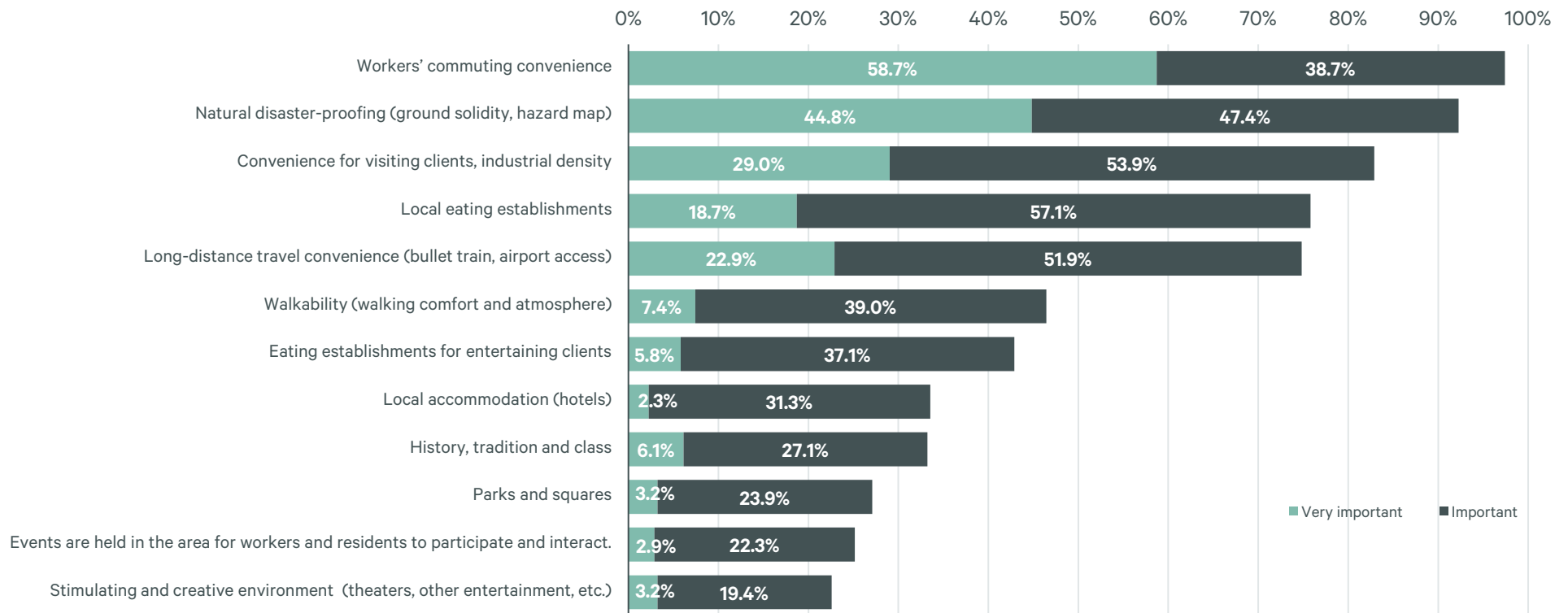
Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

n=310

## Prioritized criteria for office location selection:

**The most important criterion when selecting a potential office location is “workers’ commuting convenience”.**

**Figure 8: 【Management】 Prioritized criteria for office location selection**



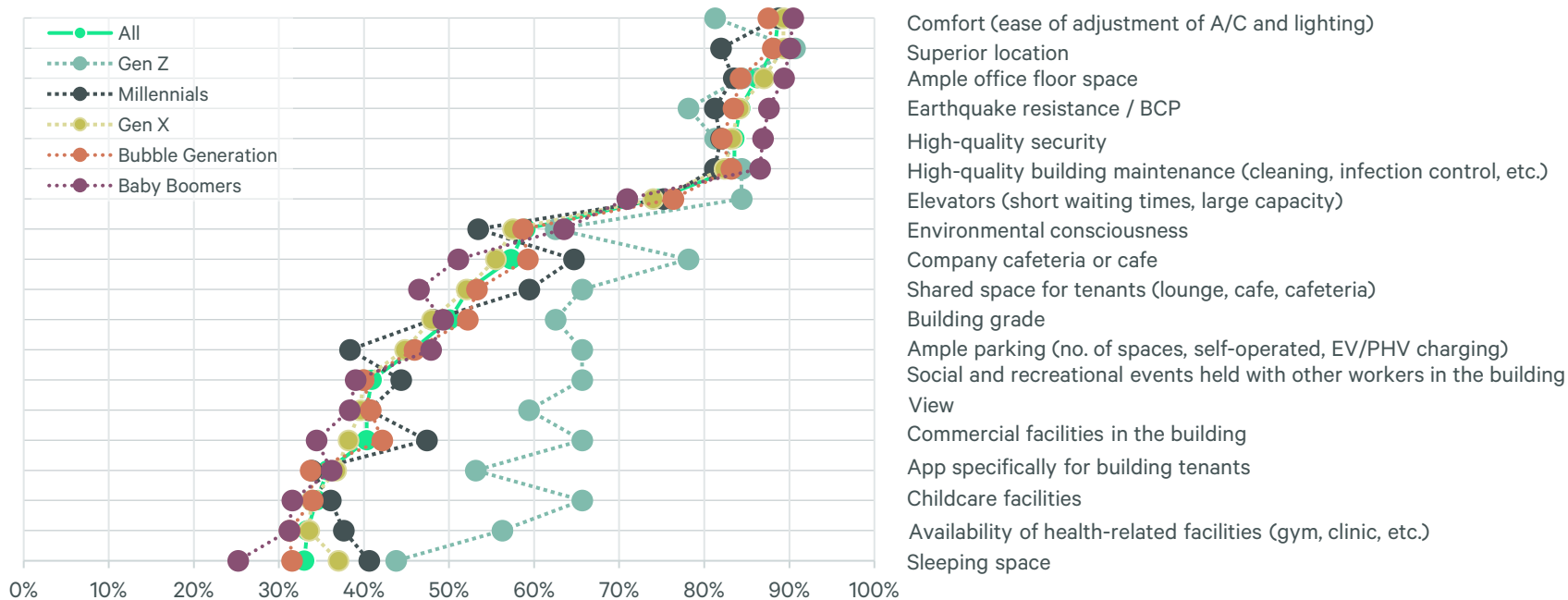
Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

n=310

### Prioritized office criteria by generation:

**While no major differences in the most common responses are noted across generations, Gen Z and millennials have higher incidences of less common responses, indicating a greater demand for added value in the office environment among younger generations.**

**Figure 9: [Employees] Prioritized office criteria by generation**



All n=1,161、 Gen Z n=32、 Millennials n=133、 Gen X n=346、 Bubble Generation n=368、 Baby Boomers n=282

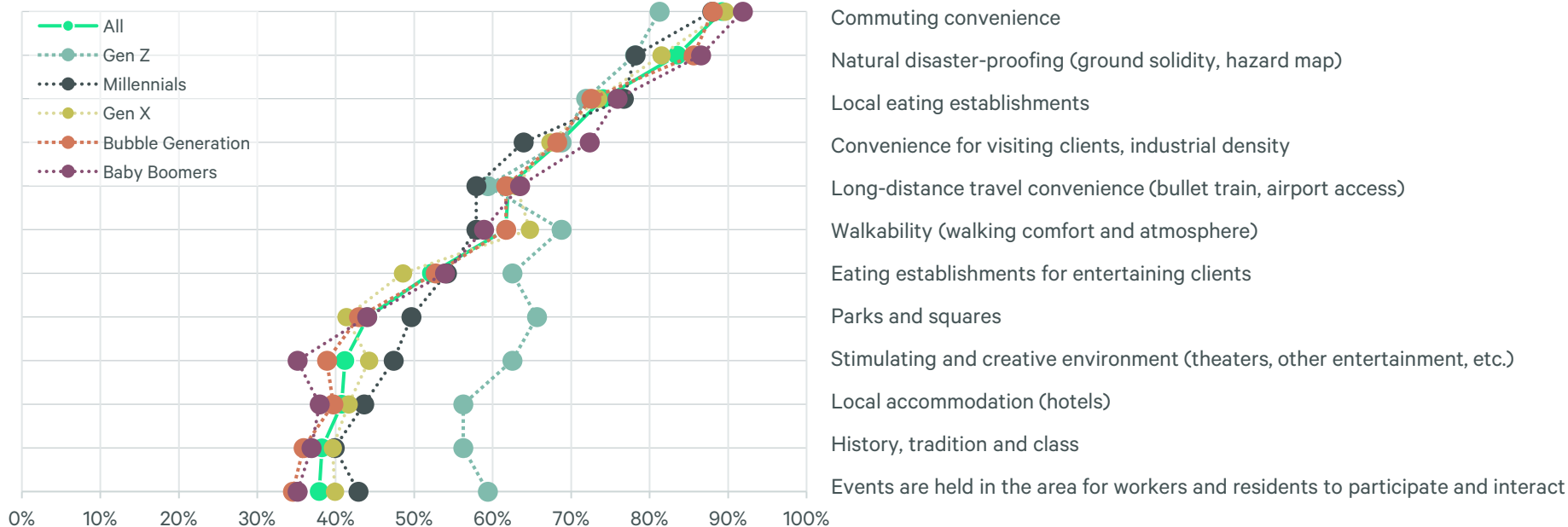
\*The combined response rate for "Very important" and "Important"

Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

### Prioritized office district criteria by generation:

**While no major differences in the most common responses are noted across generations, Gen Z and millennials have higher incidences of less common responses, indicating that younger generations are also seeking added value in office neighborhoods.**

**Figure 10: [Employees] Prioritized office district criteria by generation**



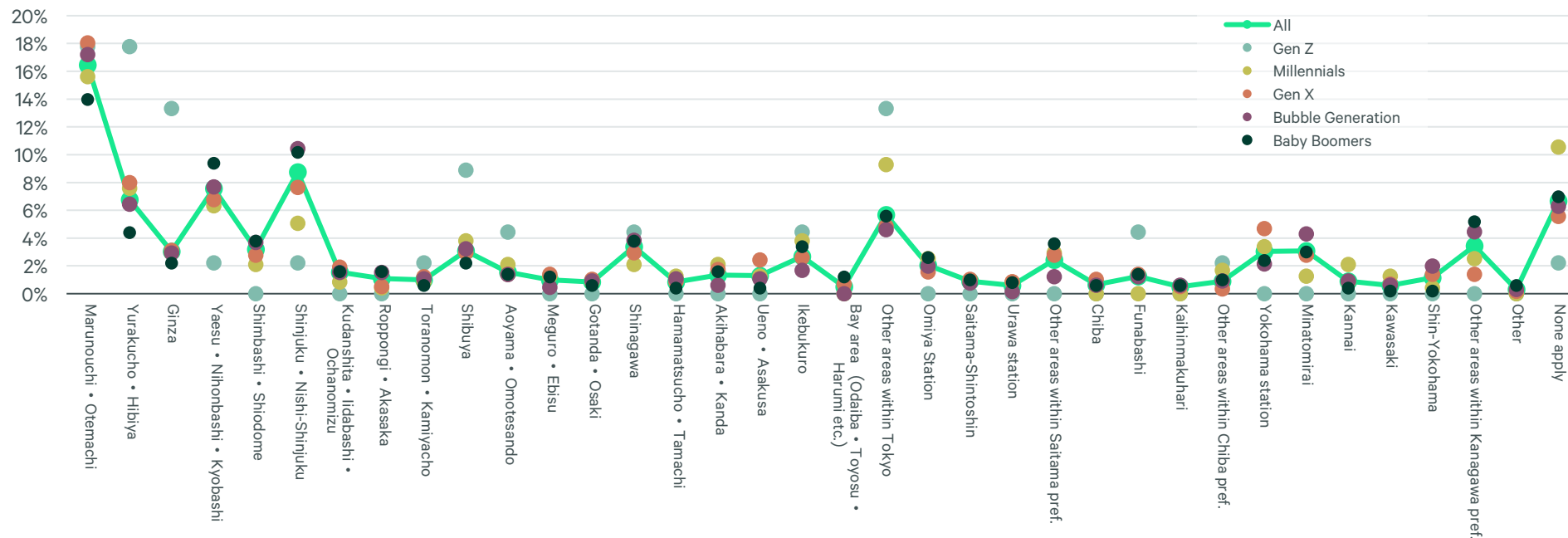
All n=1,161、Gen Z n=32、Millennials n=133、Gen X n=346、Bubble Generation n=368、Baby Boomers n=282

\* 「The combined response rate for “Very important” and “Important”

Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE “Survey on office usage”, July 2025

Preferred office district in the Greater Tokyo region by generation:  
**“Marunouchi/Otemachi” is the most preferred area across all generations. “Yurakucho/Hibiya”, “Ginza”, and “Shibuya” are also widely selected by Gen Z respondents, while the bubble generation and baby boomers have stronger preference for “Shinjuku/Nishi-Shinjuku” or “Yaesu/Nihonbashi/Kyobashi”.**

Figure 11: [Employees] Preferred office district by generation



All n=670、 Gen Z n=15、 Millennials n=79、 Gen X n=192、 Bubble Generation n=217、 Baby Boomers n=167

\*\* Based on the area totals using a calculation featuring two points for each number one preference, and one point for each number two preference.

Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

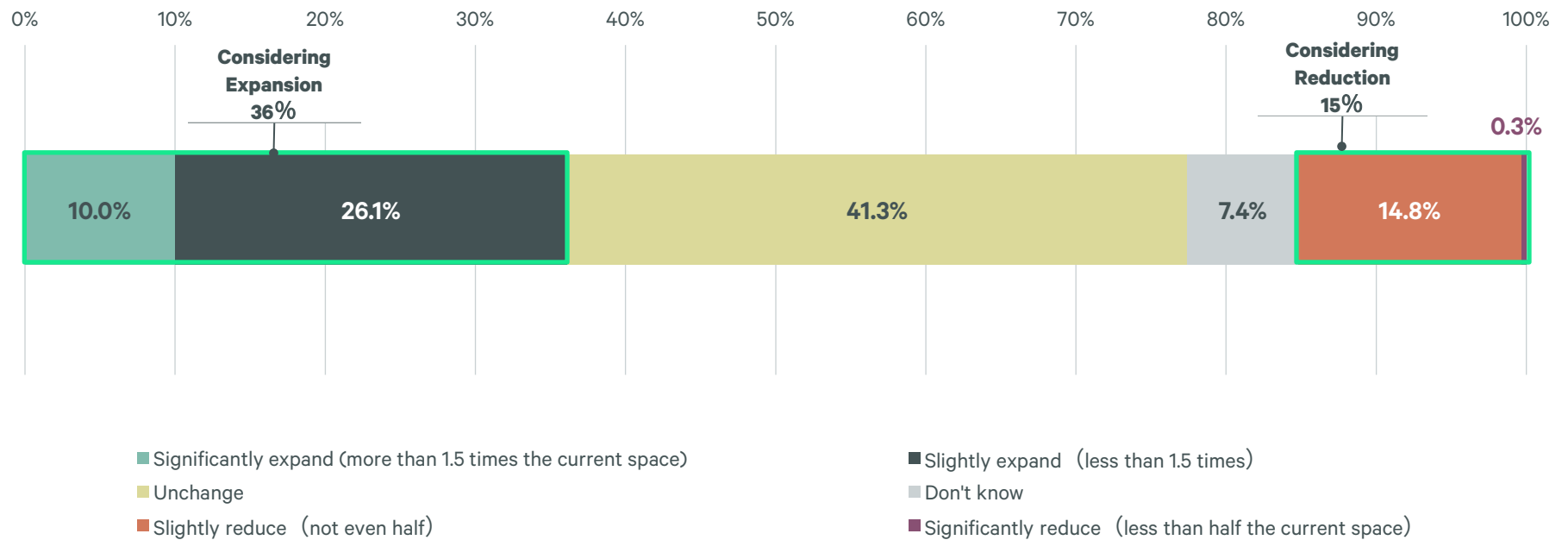
03

# Work styles and workplace strategies

Outlook on total office floor area:

**36% of companies are considering expanding their office space, well above the 15% considering a reduction.**

Figure 12: [Management] Outlook on total office floor area



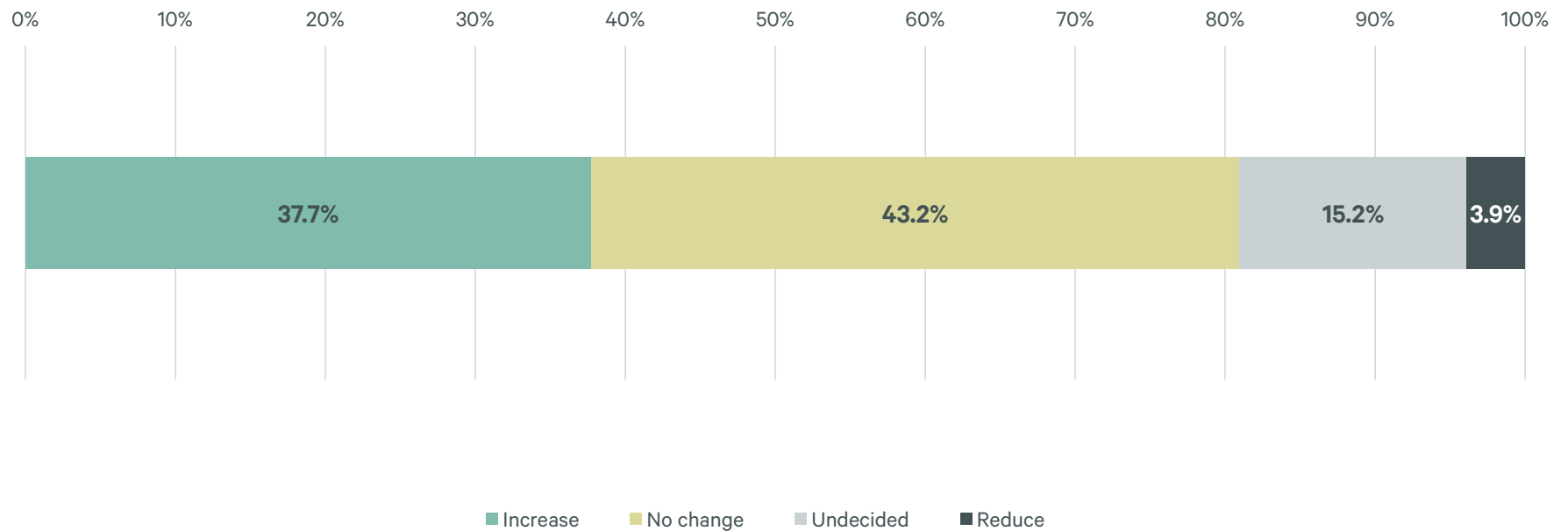
Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

n=310

Plans for future investment in improving office environments:

**The number of companies indicating that they plan to increase investment to improve their office environments is significantly more than those planning to reduce spending, underscoring a strong desire to enhance office environments.**

**Figure 13: [Management] Plans for future investment in improving office environments**



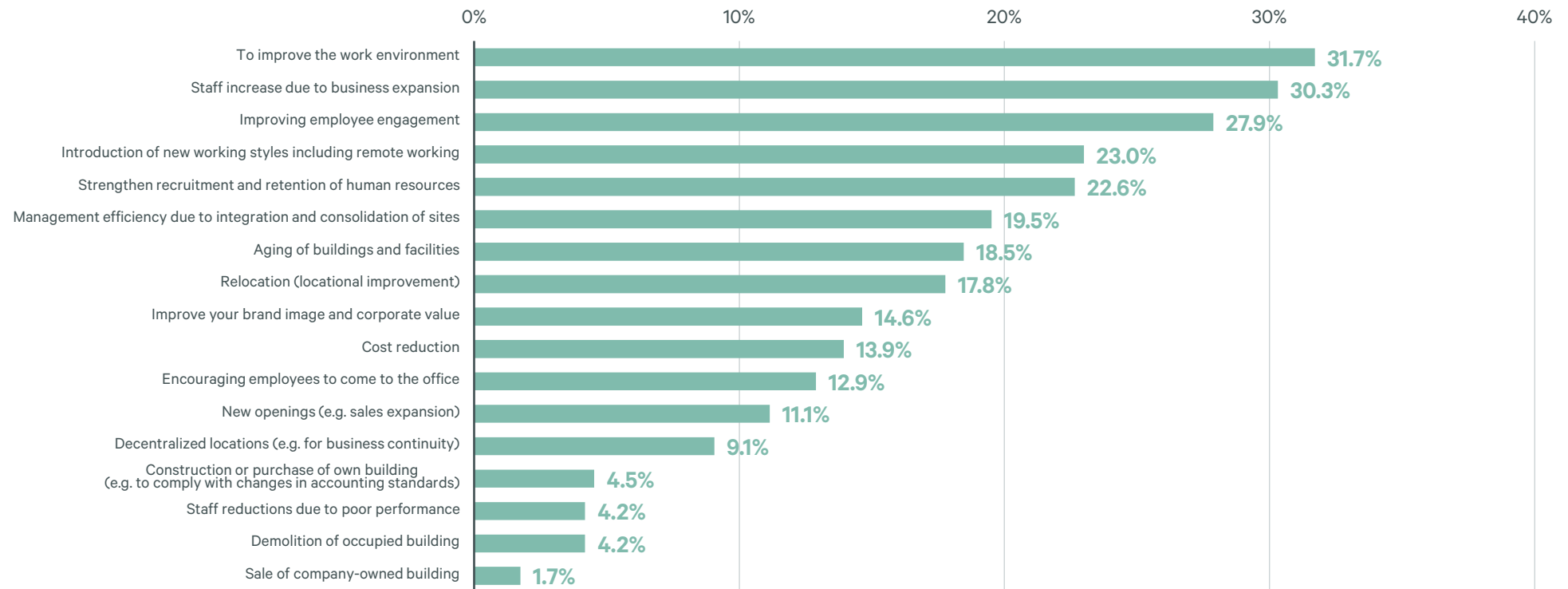
Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

n=310

## Reasons for office or floor space changes:

**The most common reason is “to improve the work environment”. This is followed by personnel- or working-style-related responses, such as “staff increase due to business expansion” and “improving employee engagement”.**

**Figure 14: 【Management】 Reasons for office or floor space changes**



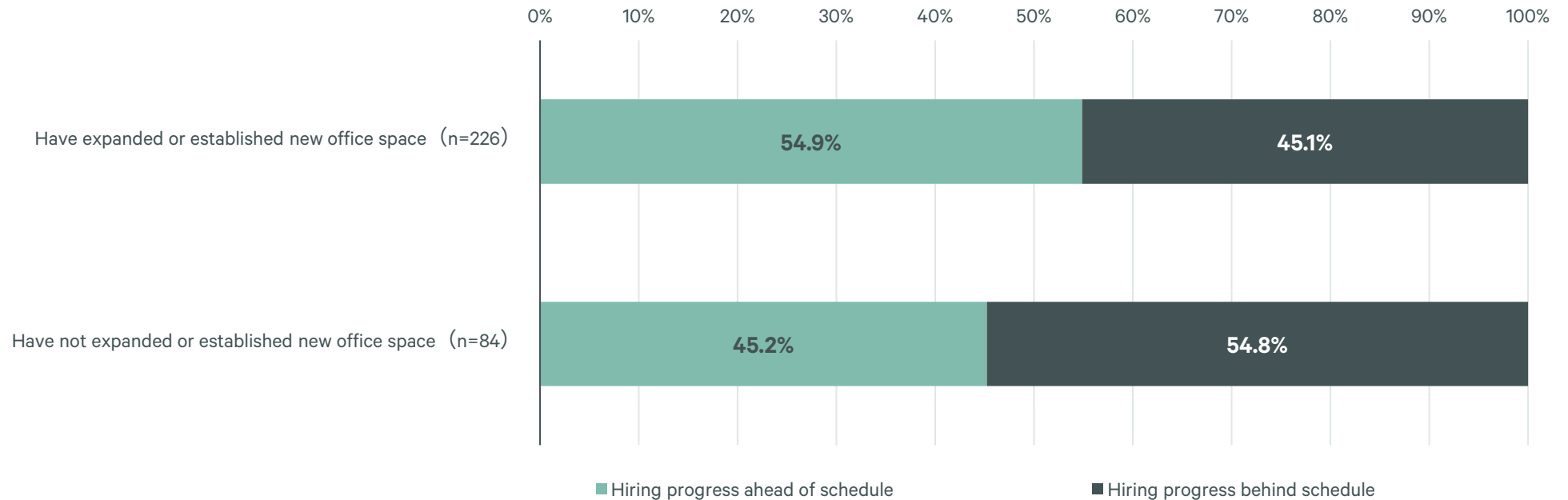
Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

n=287

## Relationship between office changes and recruitment plans:

**Companies that have undertaken office overhauls have had greater success in hiring than those that have not.**

**Figure 15: [Management] Relationship between office changes and recruitment plans**



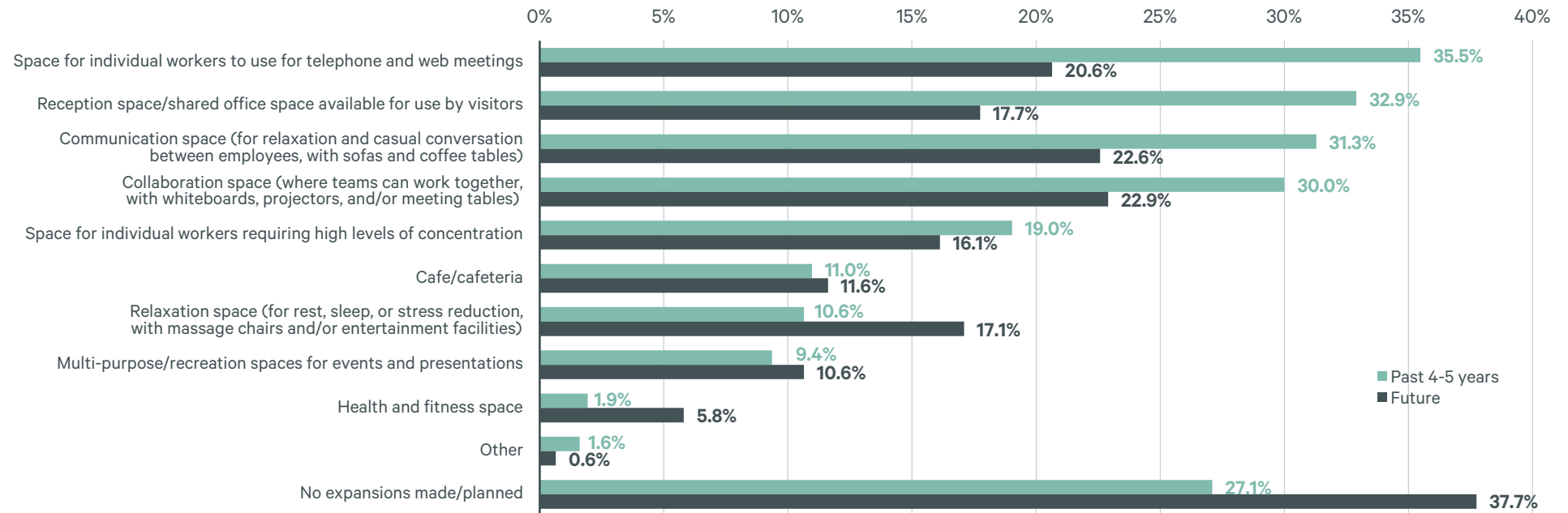
Hiring progress ahead of schedule = Ahead of schedule + On schedule

Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

Newly established and expanded office space:

**“Space for individual workers to use for telephone and web meetings”, which enjoyed a surge in demand during the COVID-19 pandemic, remains to be the most given response. Looking ahead, “relaxation spaces” are set to increase, indicating that many companies are attempting to add further value to their office environments.**

**Figure 16: [Management] Newly established and expanded office space**



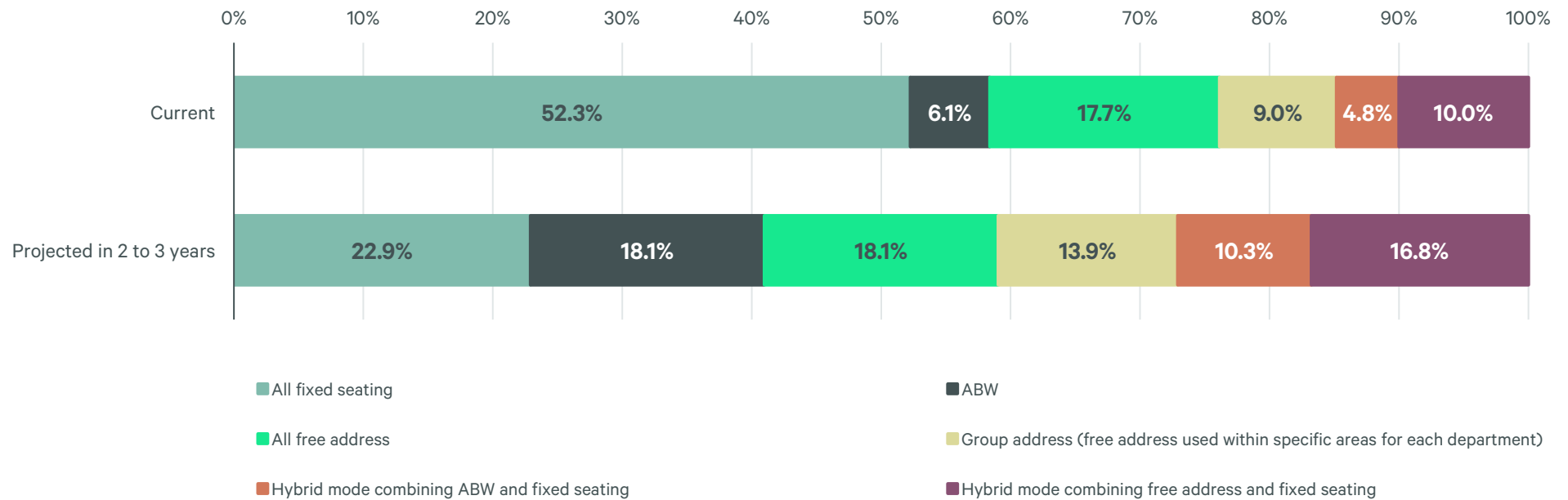
Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

n=310

### Workplace layout:

**Fixed seating make up the majority of current office space layouts adopted by companies, but many are planning to reduce fixed seating and introduce flexible seating such as ABW.**

**Figure 17: [Management] Workplace layout**



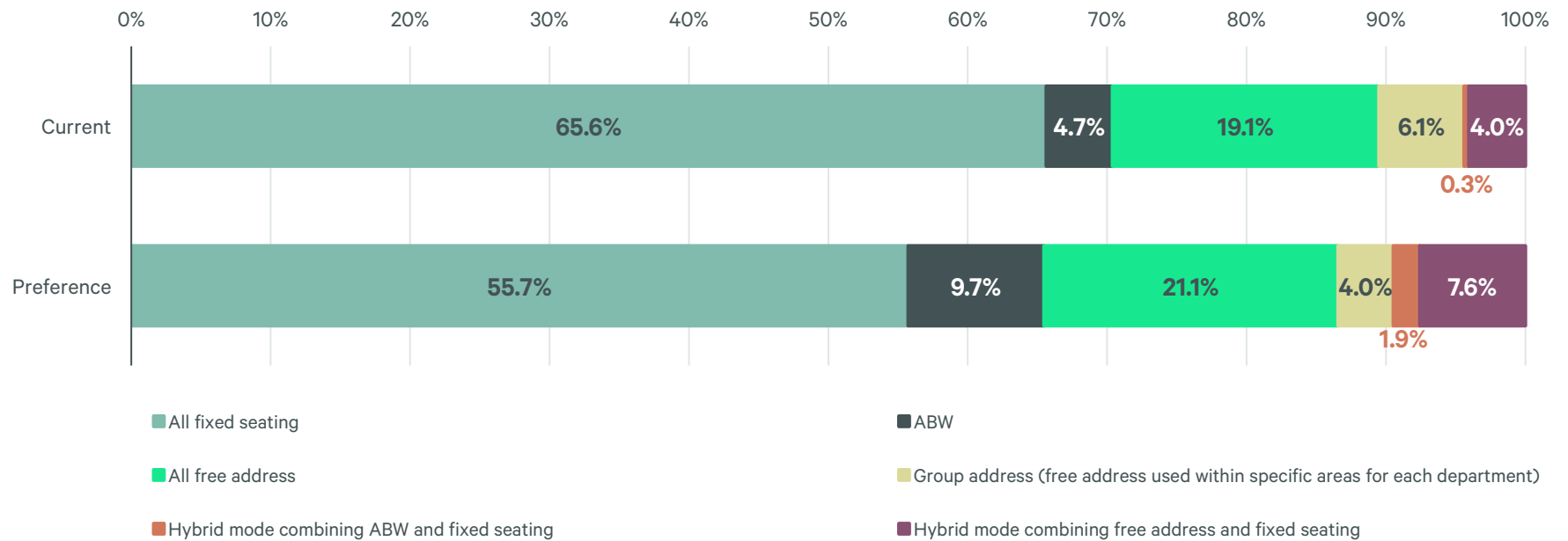
Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

n=310

### Workplace layout:

**Fixed seating accounts for nearly 70% of current office space layouts for employee respondents. While flexible office layouts such as ABW and free address seating are likely to become more popular, fixed seating will still be the most preferred.**

**Figure 18: [Employees] Workplace layout**



Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

n=1,161

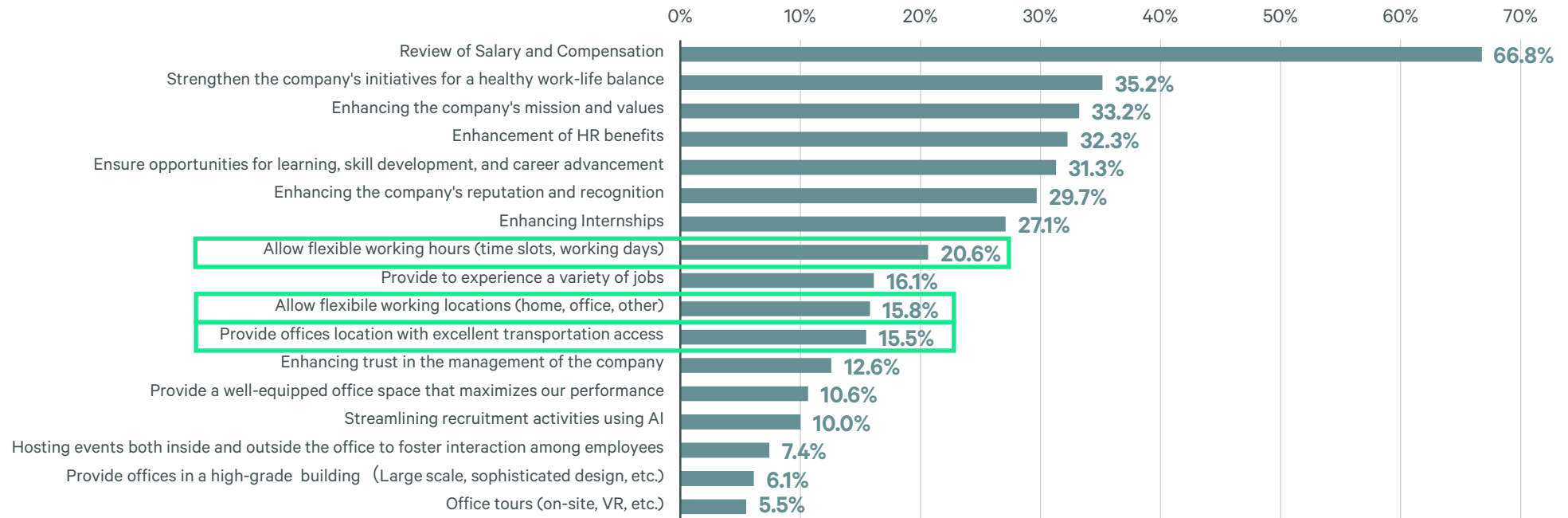
04

Policies to improve recruitment activities  
and criteria prioritized by workers

### Initiatives to attract and retain talent:

**“Review of salary and compensation” is the most common policy adopted by companies. Initiatives pertaining to working styles and office location, such as flexibility in working hours/ location, as well as providing offices in locations with excellent transportation access, are only in the mid-ranges of the priority list.**

**Figure 19: [Management] Initiatives to attract and retain talent**



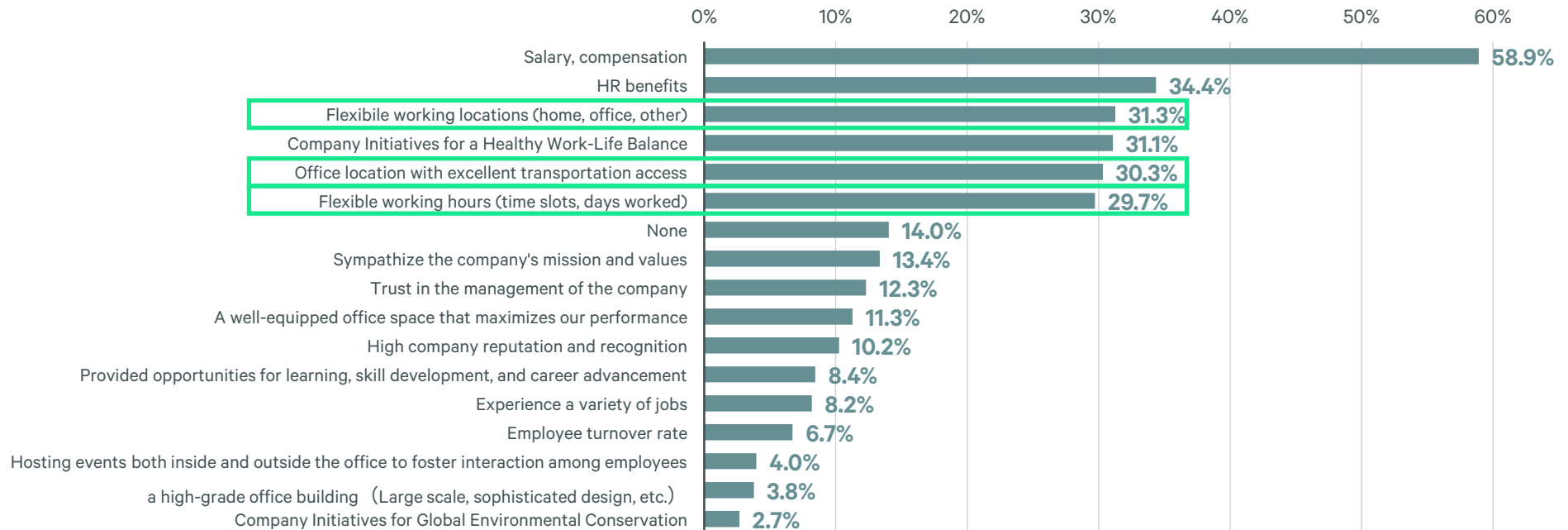
Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

n=310

Job selection criteria prioritized by workers and job seekers:

**“Salary and compensation” is the highest in priority. Criteria pertaining to working styles and office location, such as flexibility in working hours/location, as well as offices in locations with excellent transportation access, are also of high priority.**

Figure 20: 【Employees】 Job selection criteria prioritized by workers and job seekers

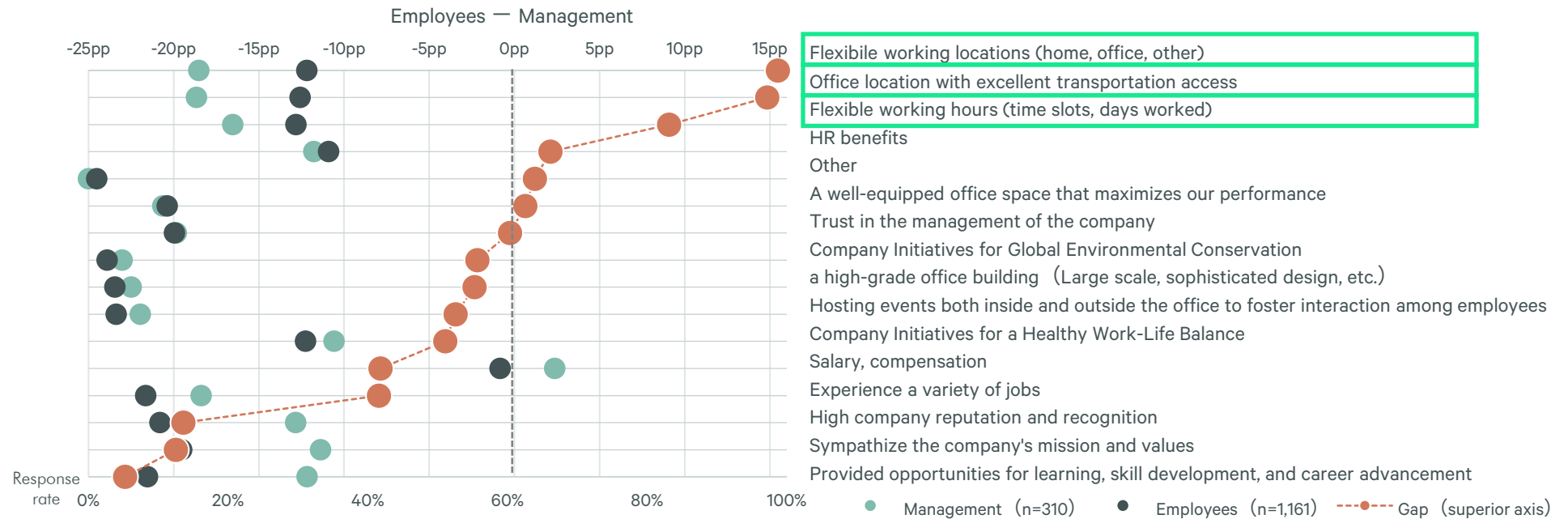


Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

n=1,161

Discrepancies between company initiatives to attract/ retain talent and criteria prioritized by workers/ job seekers:  
**There is a significant gap between management and workers/job seekers regarding the importance placed on criteria pertaining to working styles and office location, such as flexibility in working hours/ location, as well as offices in locations with excellent transportation access.**

**Figure 21: [Management/ Employees] Gap between company initiatives to attract/retain talent and criteria prioritized by workers/ job seekers**

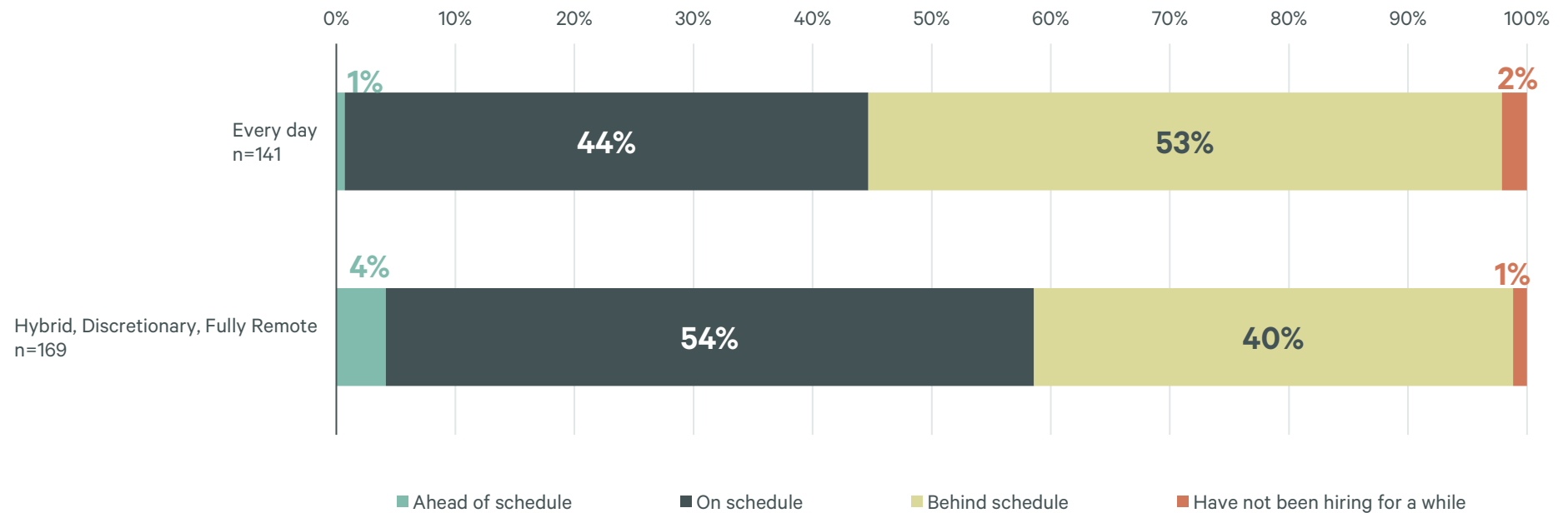


Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

Company preference for office attendance and recruitment success:

**Companies that have introduced measures to enable more flexible work styles, such as hybrid working arrangements or allowing employees to set their own office attendance rates, have had greater success in recruitment.**

**Figure 22: [Management] Relationship between company preferences for office attendance and recruitment success**



Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

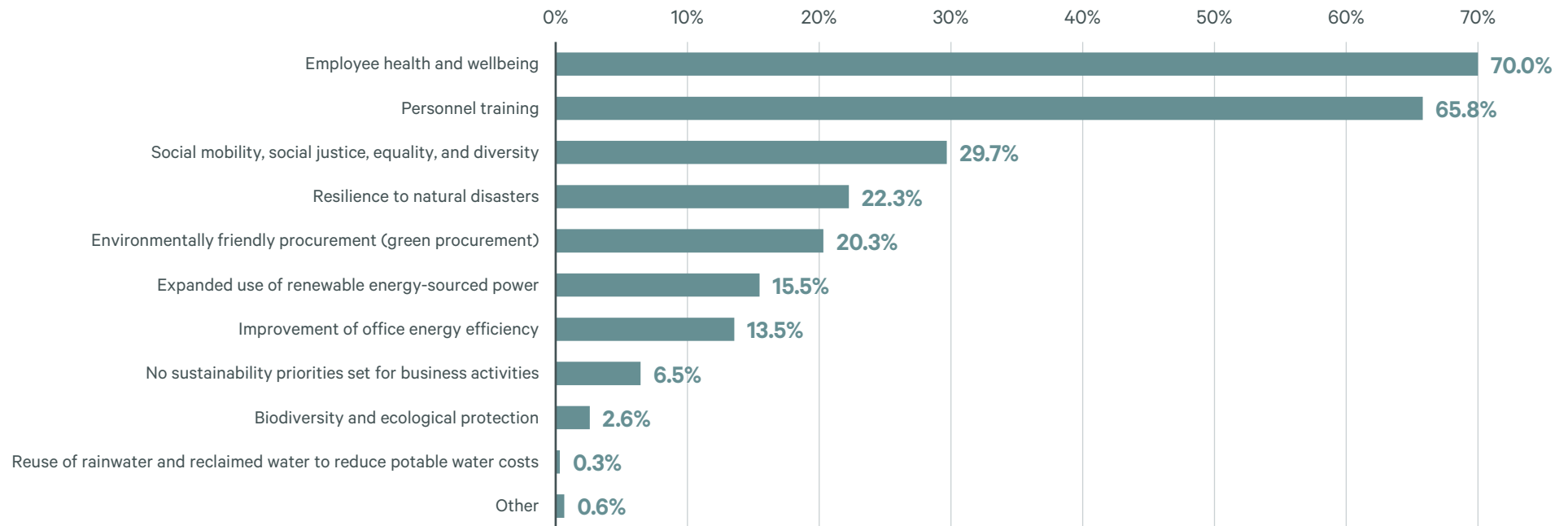
05

# Key sustainability in office leasing

Prioritized sustainability criteria:

**“Employee health and wellbeing” is top priority, with 70% of respondents choosing this criteria, followed by “personnel training”. This suggests that corporate sustainability initiatives are focused on their employees.**

**Figure 23: 【Management】 Prioritized sustainability criteria**



Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

n=310

06

# Appendix

# Appendix

## 01 Survey Objective

To understand working styles and office usage philosophies from the perspectives of both employees and corporate management, in order to identify the conditions for office environment improvements that will be effective in recruitment by generation

## 02 Survey Method

Internet survey  
(e-mail distribution and web-based responses)

## 03 Survey Period

July 22<sup>nd</sup>, 2025, to July 30<sup>th</sup>, 2025.

## 04 Survey Target

Database of Nikkei Research Inc.

## 05 Respondent Region (based on location of work)

Tokyo Metropolis, Osaka Pref., Aichi Pref., Saitama Pref., Kanagawa Pref., Chiba Pref., Fukuoka Pref., Sapporo City, Sendai City, Hiroshima City

## 06 Number of Valid Responses

Management 310, Employee 1,161

## 07 Respondent Profile

Figure 24: Respondent Region (based on location of work)

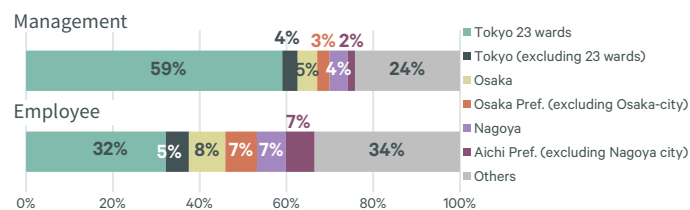


Figure 25: Respondent Generation

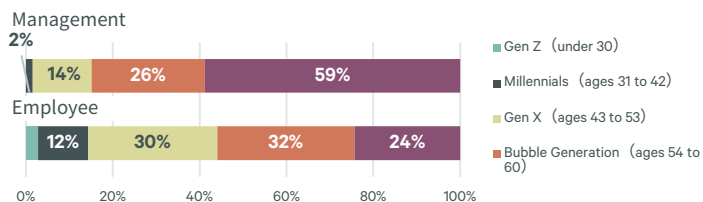
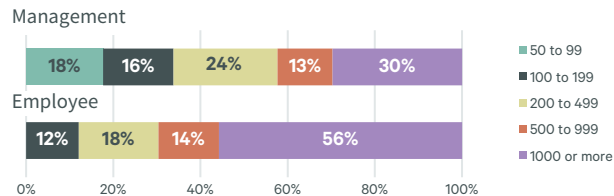


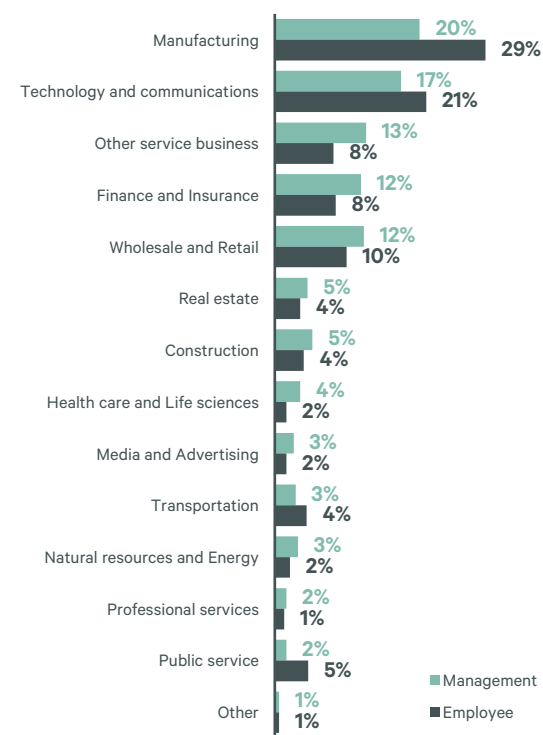
Figure 26: Size of the workforce of the company



All Figures n=310 (management); 1,161 (employees)

Source: Media Business, Nikkei Inc./ Investigation: Nikkei Research Inc./ Cooperation for investigation: CBRE "Survey on office usage", July 2025

Figure 27: Respondents by Industry



# Contacts

---

## Japan Research

### Yuji Iwama

Senior Director  
Office Team Leader  
yuji.iwama@cbre.com

### Yoshitaka Igarashi

Director  
Office Team  
yoshitaka.igarashi@cbre.com

### Kumiko Ninomiya

Senior Analyst  
Office Team  
kumiko.ninomiya@cbre.com

### Chinatsu Hani

Senior Director  
Head of Research  
chinatsu.hani@cbre.com

© Copyright 2025. All rights reserved. This report has been prepared in good faith, based on CBRE's current anecdotal and evidence based views of the commercial real estate market. Although CBRE believes its views reflect market conditions on the date of this presentation, they are subject to significant uncertainties and contingencies, many of which are beyond CBRE's control. In addition, many of CBRE's views are opinion and/or projections based on CBRE's subjective analyses of current market circumstances. Other firms may have different opinions, projections and analyses, and actual market conditions in the future may cause CBRE's current views to later be incorrect. CBRE has no obligation to update its views herein if its opinions, projections, analyses or market circumstances later change.

Nothing in this report should be construed as an indicator of the future performance of CBRE's securities or of the performance of any other company's securities. You should not purchase or sell securities—of CBRE or any other company—based on the views herein. CBRE disclaims all liability for securities purchased or sold based on information herein, and by viewing this report, you waive all claims against CBRE as well as against CBRE's affiliates, officers, directors, employees, agents, advisers and representatives arising out of the accuracy, completeness, adequacy or your use of the information herein.

**CBRE**