Work Style & Use of Office Space Survey 2015

New work style influences location and use of office

Recent progress in information technology enabled work style changes. Mobile working[1] is one of them. If flexible work style continues to expand, will there be any changes in company's office location strategy and use of office space?

Our research encompasses current situations and three-to-five year plans of companies in Japan including obstacles against such plans. This is a summary of the results.

Key Findings From Research

➢ **Current Situation & Future Plan (Figure 1)**

- About 60%-70% said they have introduced or in process of mobile working with IT tools.
  About 80% are positive in introducing it in a three-to-five year plan.

- About 20% said they have introduced or in process of work-from-home programs.
  About 40% are positive in introducing it in a three-to-five year plan.

- About 20% said they have introduced or in process of hot-desking system.
  Only approx. 10% have workplaces other than their main office (third-place office[2] / satellite office[3]).

➢ **Problems to be solved by New Work Style & Obstacles against Future Plans**

- About 80% said improving work efficiency and productivity is what they want to solve, followed by forward-looking challenges including improving workers' motivation and more active internal communication. **(Figure 2)**

- As obstacles against three-to-five year plans, respondents raised difficulties in managing attendance, avoiding risk of information leakage and office costs (fixed costs).
  When it comes to the new work style, respondents feel difficulties in developing the system. When it comes to the office innovations, respondents feel difficulties in controlling the costs. **(Figure 3)**

➢ **What companies with positive plans have in common**

- Larger companies (number of employees) are more likely to have mobile working and work-from-home programs. They are also more positive in future office plans. **(Figure 4)**

- Companies with mobile working system have a stronger awareness of improving productivity while companies without such system are more focusing on reducing office costs. **(Figure 5)**
  Companies with mobile working system also expressed stronger willingness for work-from-home programs, hot-desking system and separate offices. **(Figure 6)**

Mobile working with IT tools has become increasingly common. Compared to this, however, introducing alternative workplace remains slow; work-from-home programs and third place offices were introduced by only a limited number of companies. Nevertheless, companies that accepted new work style are motivated in office innovations too. There is a possibility that company's office location strategy and use of office space will have an influence of changing work style.

*1 Mobile working: IT environment/system that enables workers to work outside the office, when traveling or visiting places.

*2 Third-place office: Sub-workplace where workers enjoy an environment equivalent to that of their main office in terms of IT system and security. Used when workers are away from the main office (visiting somewhere near terminal rail station).

*3 Satellite office: Office in the local area near workers' home, where workers enjoy an environment equivalent to that of their main office.

Figure 1: New Work Style & Office Innovations—Current Situation & Future Plan (n=1137)
Higher motivations in the future

Category	Current situation (Introduced + In process)	Future plan (Yes + Sort of yes)
Mobile working (IT system allows remote access to emails and schedule.)	75%	83%
Mobile working (IT system allows remote access to company server.)	61%	77%
Mobile PC and tablets to workers for mobile working	65%	74%
Work-from-home programs	19%	40%
Third-place office near terminal rail station	11%	22%
Satellite office near workers' home	7%	17%
Hot-desking system	19%	38%

■ Current situation (Introduced + In process)　■ Future plan (Yes + Sort of yes)
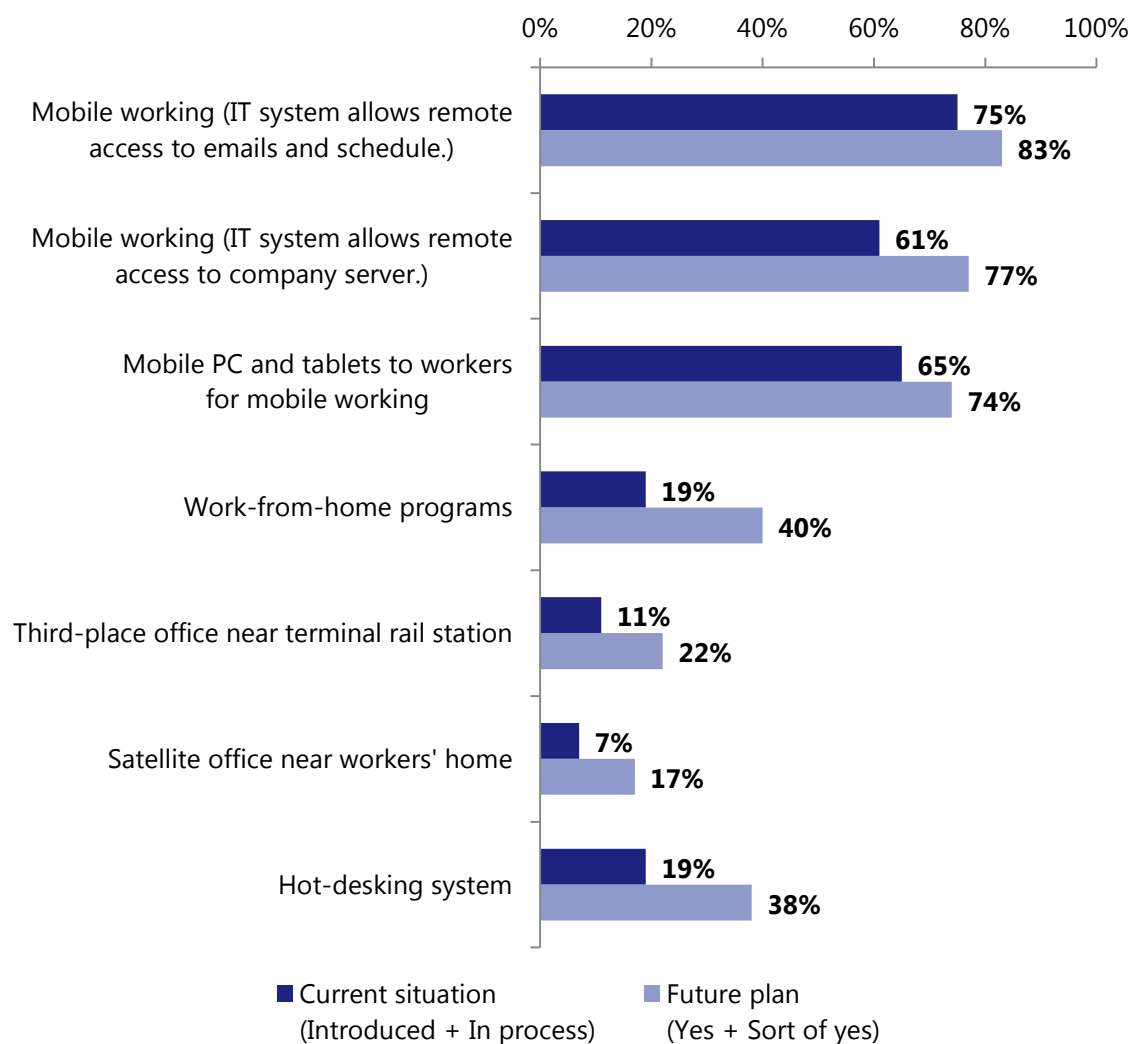
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Figure 2: Problems to be solved with New Work Style (Multiple answers, n=1137)

Improving the work efficiency and productivity topped the list

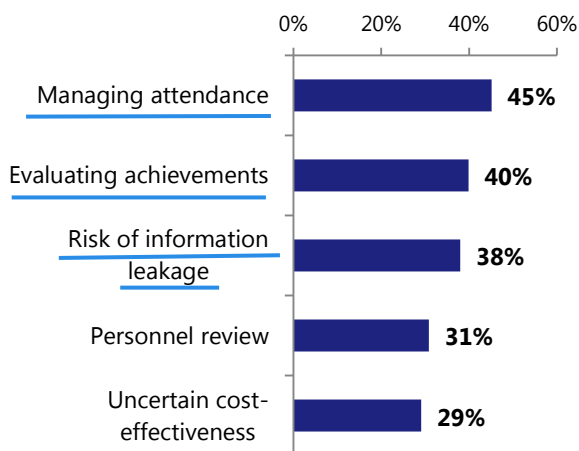| Problem	%
Work efficiency and productivity	76%
Workers' motivation	52%
More active internal communication	42%
Reduce office cost	36%
Work-life balance	35%
Long working hours	34%
Employees' refreshment	29%
Fair evaluation of achievements	28%
Support workers with child/elderly care needs	25%
Business Continuity Plan (BCP)	23%
Reduce commuting time	20%
Reduce job turnover	18%
Workplace diversification	18%
Reduce travel cost	17%
Efficient recruiting	11%
None in particular	3%

Figure 3: Obstacles in Achieving Future Plans (Multiple answers, n=1137)

Managing attendance/Evaluating achievements   Office Costs (Fixed Costs)

Risk of information leakage

New Work Style

	%
Managing attendance	45%
Evaluating achievements	40%
Risk of information leakage	38%
Personnel review	31%
Uncertain cost-effectiveness	29%

Office Innovations

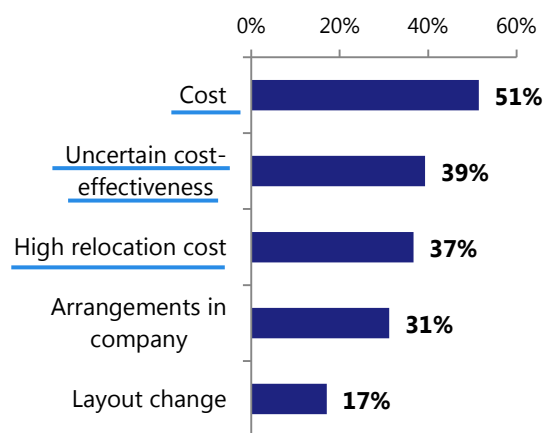|	%
Cost	51%
Uncertain cost-effectiveness	39%
High relocation cost	37%
Arrangements in company	31%
Layout change	17%

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Figure 4: Future Plans by Number of Employees (n=1137) [4]

Larger companies are more motivated in office innovations in the future.

Percentage of "Yes" + "Sort of yes"

Category	301 or more	1 to 300
Work-from-home programs	46%	38%
Best location for each business division	31%	24%
Third-place office near terminal rail station	27%	20%
Satellite office near workers' home	23%	15%
Hot-desking system	48%	35%

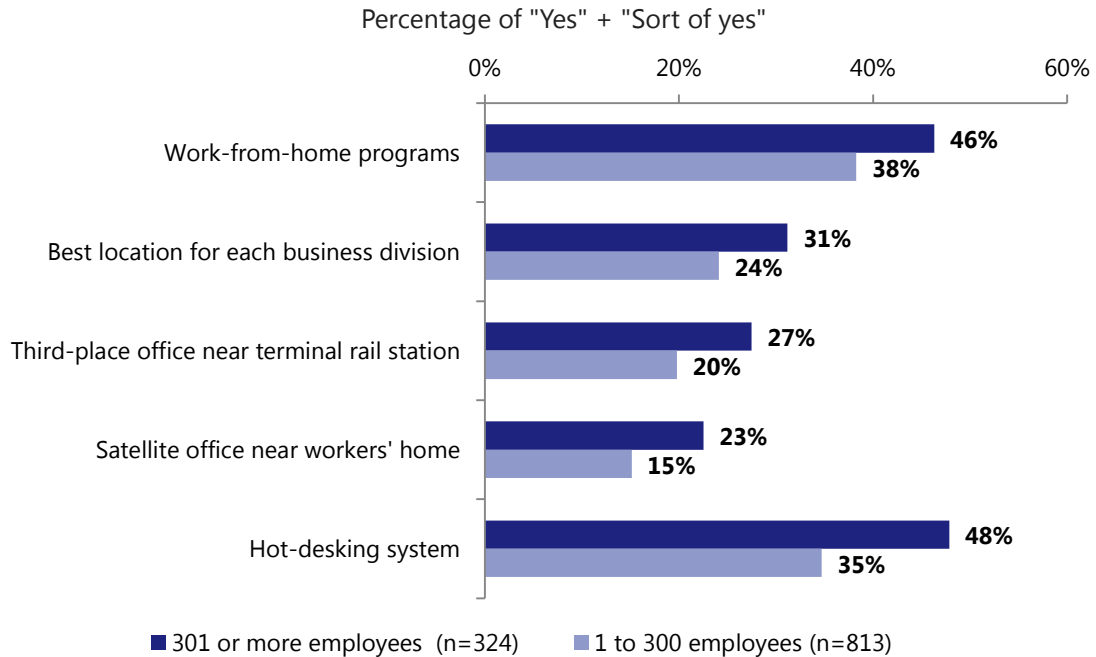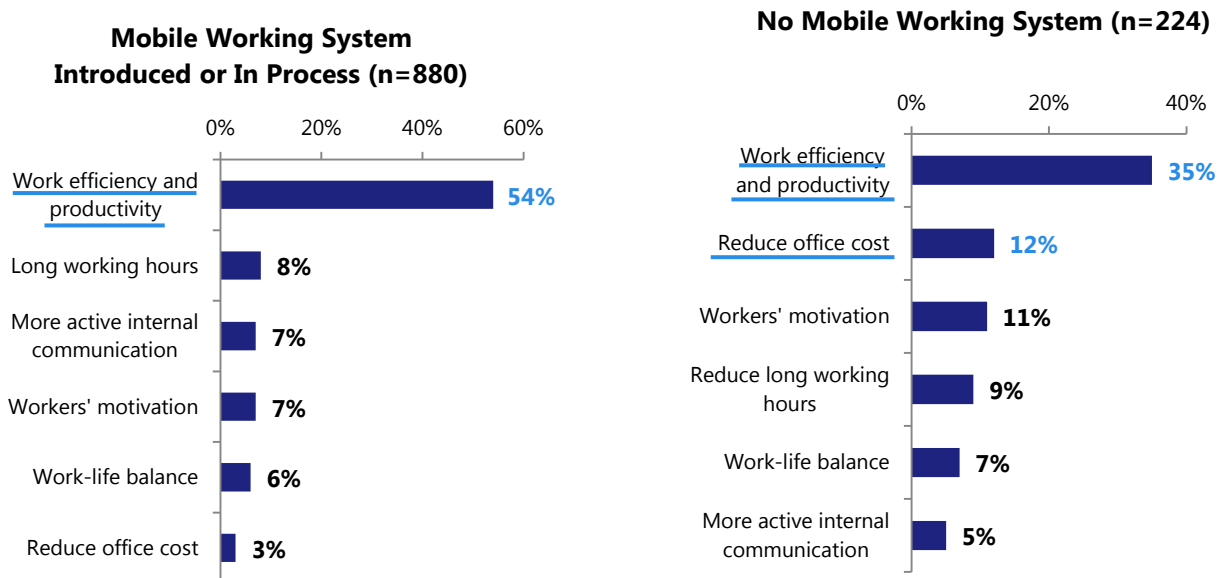■ 301 or more employees (n=324)   ■ 1 to 300 employees (n=813)

Figure 5: Top Priority Problem to be solved by New Work Style

by Company's Current Situations (n=1104) [4]

Over 50% said "Work efficiency and productivity"   **Office Costs ranked No. 2**

Mobile Working System
Introduced or In Process (n=880)

Work efficiency and productivity	54%
Long working hours	8%
More active internal communication	7%
Workers' motivation	7%
Work-life balance	6%
Reduce office cost	3%

No Mobile Working System (n=224)

Work efficiency and productivity	35%
Reduce office cost	12%
Workers' motivation	11%
Reduce long working hours	9%
Work-life balance	7%
More active internal communication	5%

*4 "Mobile working" in these questions refers to "IT system allows remote access to emails and schedule", "IT system allows remote access to company server" and " Mobile PC and tablets to workers for mobile working".

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Figure 6: Future Plans by Current Situations (n=1137)

Companies with mobile working system are more motivated in future plans.

Percentage of "Yes" + "Sort of yes"

■ One or more mobile working systems
Introduced or in process (n=890)　　■ Not introduced and not in process (n=247)
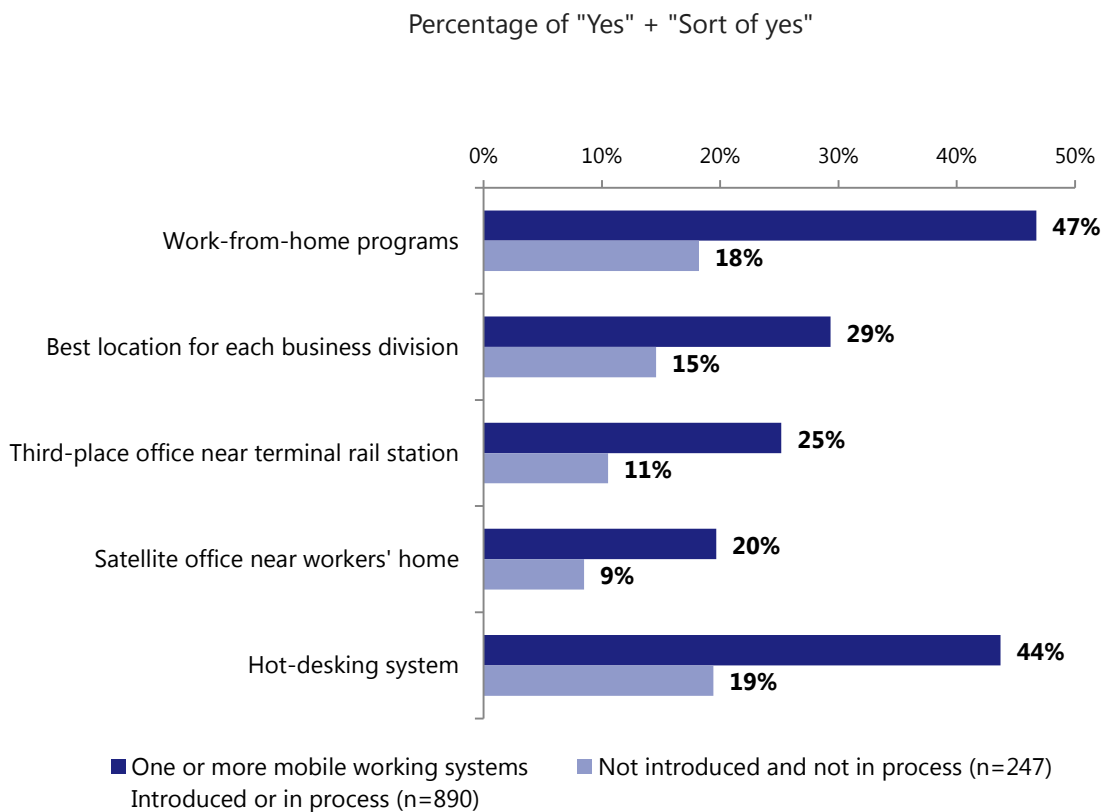
The full version of the report is available from the following page.