Xymax Real Estate Institute
RESEARCH REPORT

Greater Tokyo Office Worker Survey 2018

Capturing changes in workers' workstyles and values

June 6, 2018

Companies are accelerating their efforts in workstyle reforms and promoting diverse ways of working that are not bound by time and place. Such new workstyles have become an important topic not only in companies' management strategies but also for office workers in terms of productivity improvement and work-life balance.

Against this backdrop, Xymax Real Estate Institute has been conducting questionnaire surveys to capture changes in workstyles and the workplace from the perspectives of both companies and office workers, and has published the results. We have conducted surveys of companies since autumn 2016, while our first questionnaire survey of office workers on telework was carried out in the end of 2016, this being the second. This periodic report, based on the results of the questionnaire, summarizes the latest trend of office workers' actual workstyles and values.

Related surveys
- "New Ways of Working and New Types of Office" April 13, 2017
- "Metropolitan Areas Office Demand Survey Autumn 2017" December 7, 2017

https://www.xymax.co.jp/english/news_research/?type=research

Summary of Survey Results

1. Actual state of telework

- **8.1%** of respondents teleworked for any length of time over a week. However, we found that there was a disparity between respondents' awareness that they were teleworking and the actual teleworking ratio (**18.3%**).
- Teleworkers tended to be **male aged 20–24 (21.4%) and 40–44 (13.6%)**, and **female aged 35–39 (13.3%)**. The most common industries of teleworkers were **information & communication (13.6%)** and **manufacturing (12.5%)**, while the most common job categories were **specialized technical work such as R&D, design, and system engineering (13.4%)** and **sales (13.2%)**.
- The most popular place where teleworkers usually teleworked was **home (81.8%)**. Almost all places, including **office space made available by the company (21.0%)**, saw a rise in the percentage compared to the previous survey, indicating that options of teleworking places are increasing.
- **44.6% of teleworkers chose only one place as the place where they usually teleworked**, while **55.4% teleworked at two places or more**.
- In terms of when workers teleworked, **"on the date and time arranged in advance" (58.1%)** rose sharply from the previous survey (37.3%), indicating that scheduled teleworking is increasing.
- There was a gap between the expectations and concerns in telework of those who did not telework and the actual upsides and downsides experienced by those who teleworked. Those who

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teleworked experienced upsides more strongly than expected in items such as "concentration on work" and "improved work outcomes," while not many of those who teleworked actually experienced downsides in items that tend to be viewed as concerns by those who did not telework, such as "less communication in work" and "difficulty for subordinates to report, contact and consult with boss."

2. Workplace and satisfaction

- Satisfaction in the current workplace environment of **those who teleworked (59.4%) was nearly double** that of those who did not telework (31.2%).
- When presenting several conditions related to the tangible and intangibles aspects of workplace environment and asking respondents how much each of them applied to their environment, the group of respondents with a greater satisfaction in the overall workplace chose "applies" or "somewhat applies" more than the group of respondents with smaller satisfaction for all of the conditions. This indicates that the **conditions presented here (especially in the intangible aspects) may have had an influence on the satisfaction of workers**.

3. The needs for telework

- **44.6%** of respondents had positive intentions toward teleworking in the future. Intentions were especially high (**more than 50%**) among **men aged 20–24 and 40–44** and **women aged 25–29 and 30–34**. In terms of child status, the intention was the highest among those **with child(ren) in the lower grades of elementary school or younger (54.1%)**.
- The place where respondents wanted to telework the most in the future was **home (90.6%)**. Intentions to use **office space made available by the company (16.9%)** and **office space by service provider (9.6%)** also increased slightly from the previous survey.
- Top impediments to promoting telework were **"lack of system that allows telework" (54.6%)** and **"lack of work-from-home system" (35.1%)**. Teleworkers particularly felt impediments in the places for telework, such as **"lack of/few places for telework apart from home (third place office)" (22.3%)** and **"own burden of costs for using office space by service providers" (16.2%)**.
- In terms of what was important when using a third place office, the most popular reply was **"proximity to home" (71.7%; "important" and "somewhat important" combined)**. **"Quietness" (63.9%)** and **"security" (63.6%)** also ranked high.
- As for intentions to use the five types of third place offices ((1) touch-down type; (2) project room type; (3) shared satellite type; (4) office with support features for workers with small children; (5) co-working type), both men and female **aged 25–29** and **30–34** had high intentions to use **offices with support features for workers with small children**, with female respondents in particular showing greater interest than in other types. The intentions to use the other four types tended to be higher among younger age groups.

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1. Actual state of telework

1-1. Teleworking ratio and the profile of teleworkers

- ✓ 8.1% of respondents teleworked for any length of time over a week. However, we found that there was a disparity between respondents' awareness that they were teleworking and the actual teleworking ratio.
- ✓ In terms of respondent profile, the teleworking ratio was relatively high among men aged 20–24 and 40–44 and women aged 35–39, in the information & communications and manufacturing industries, and in job categories of specialized technical work such as R&D, design, and system engineering, and sales.

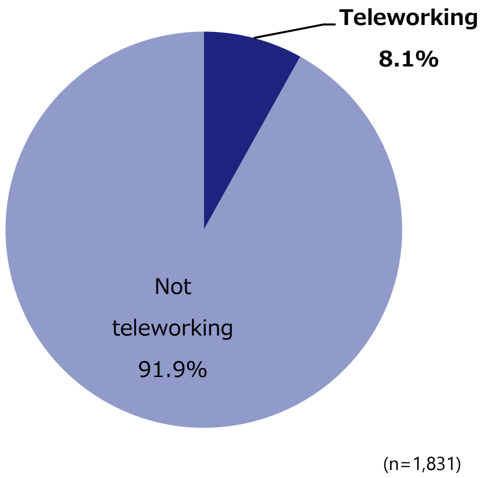
In this survey, we obtained valid responses from 1,831 men and women aged between 20 and 69 whose professions were officer of a company or institution, company employee or staff of institution, or self-employed (other than restaurant, retailer, or interpersonal service provider) and whose main place of work (office) was in Greater Tokyo (Tokyo, Kanagawa, Saitama, and Chiba prefectures). We examined the respondents' degree of telework.

First of all, we asked how much they teleworked out of their total working hours of one week. Those who teleworked for even a short length of time (one minute or more) was 8.1% of all respondents (**Figure 1**).

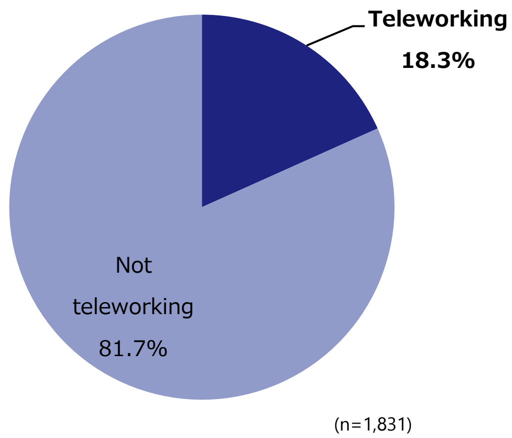
This figure differs from the result of the current work environment (**Figure 28** on p.29), which we will describe later in "5. (Reference) Actual workstyles of respondents." Those who chose an item that applied to the definition of telework* ("mobile working," "using the work-from-home system/working from home," etc.) from the options in **Figure 28** was 18.3% of total, which exceeds 8.1% (**Reference**). This implies that quite a few people are actually teleworking without being aware of it.

*This survey and report conforms to the definitions by the Ministry of Internal Affairs and Communications and Japan Telework Association.

Figure 1: Teleworking ratio



(Reference) Actual teleworking ratio based on Figure 28



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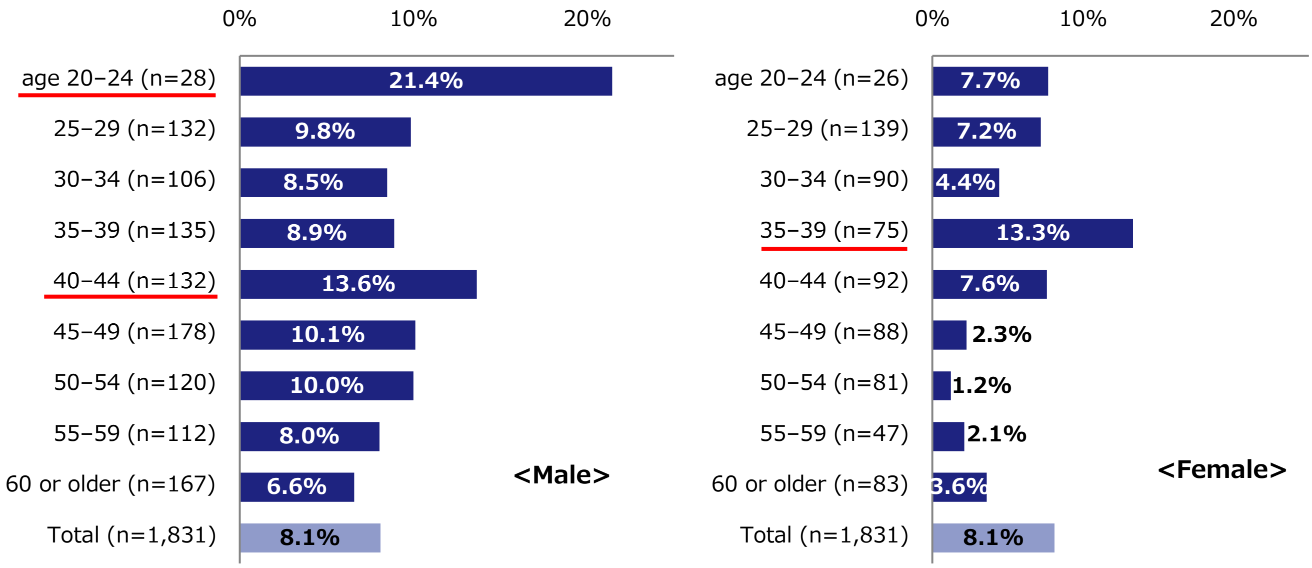
We hereinafter define the 8.1% of respondents who are aware that they are teleworking as "teleworkers" and examine their profiles.

In terms of gender and age, among men the teleworking ratio was relatively high in the age groups of 20–24 and 40–44, or, in other words, in the young and management post ages (**Figure 2**). Among women on the other hand, while the ratio was lower than men overall, it stood out in the 35–39 age group. This may be due to the fact that this age group is in the midst of child-rearing.

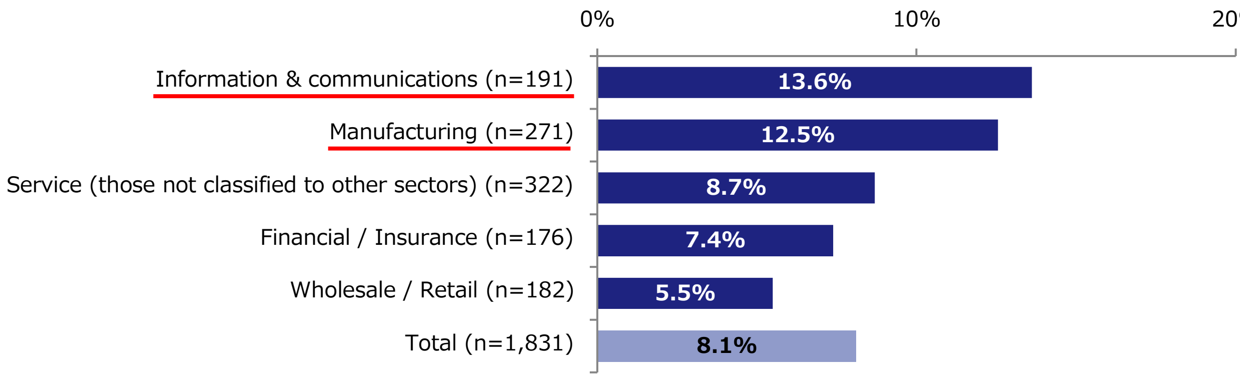
Figure 2: Teleworking ratio by gender and age



In terms of industry, the ratio was relatively high in the information & communications and manufacturing industries, both with more than 10% (**Figure 3**).

Figure 3: Teleworking ratio by industry

(Excerpts of major industries)



In terms of job category, we discovered that teleworking was carried out in a broad range of job categories such as "specialized technical work such as R&D, design, and system engineering," "sales," "specialized creative work such as editing, designing, and writing," "administration / personnel / accounting / planning, etc.," and "specialized office work such as research/analysis and patent/law" (**Figure 4**). The ratio was relatively low in job categories with designated places of work such as "site management/supervision" and "customer service."

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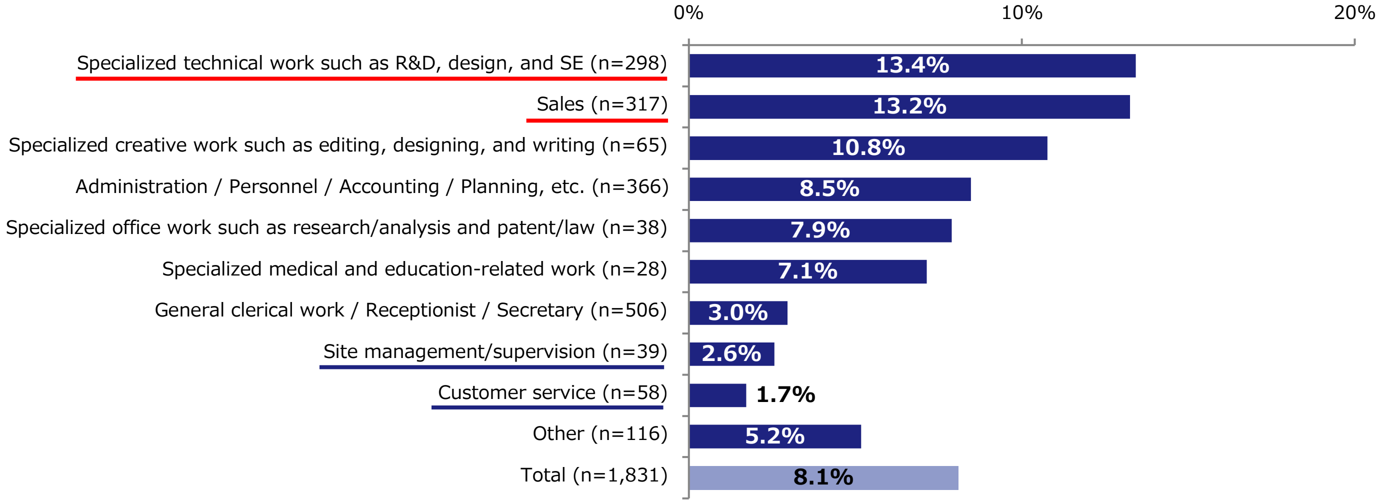
Figure 4: Teleworking ratio by job category



In terms of the form of employment, the ratio was highest among the self-employed (other than restaurant, retailer, interpersonal service provider), while persons in the management post had the highest ratio among company employees and staff of institutions (**Figure 5**). This is probably because both relatively have discretion over their work. In terms of child status, the ratio was the highest among those with children in lower grades of elementary school or younger, who are generally considered to be bearing a significant burden of child-rearing (**Figure 6**). This could be interpreted as proof that telework plays a role in supporting workers' childcare.

Figure 5: Teleworking ratio by form of employment

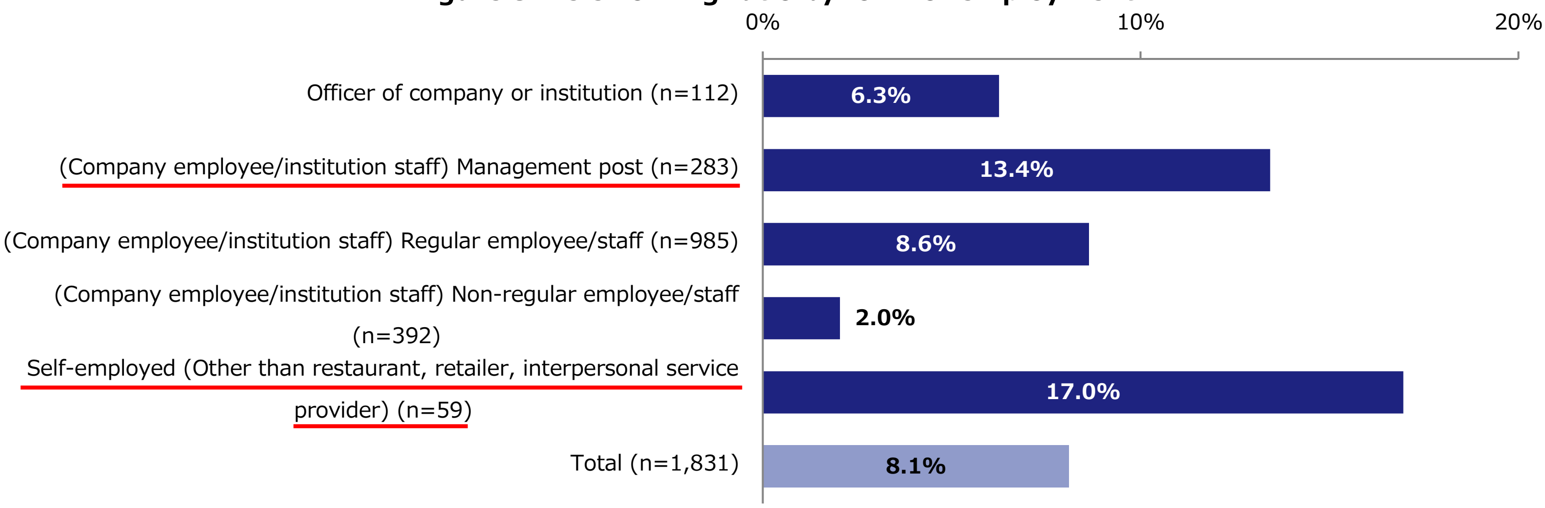
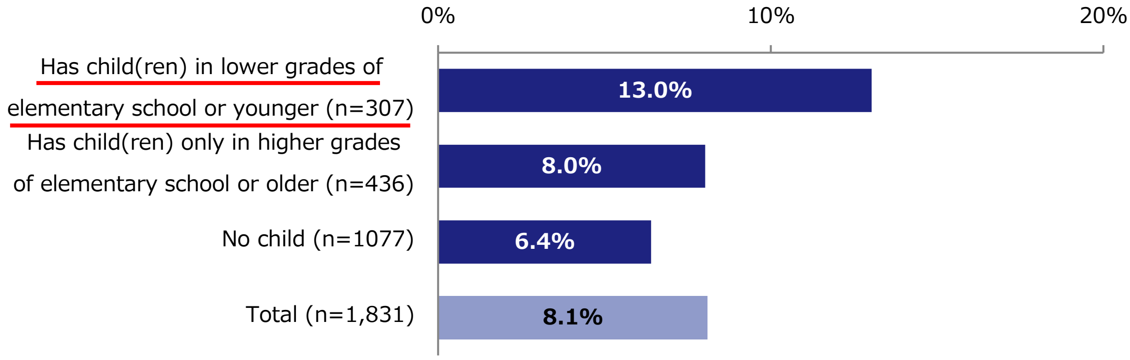


Figure 6: Teleworking ratio by child status



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1-2. Actual state of telework

- ✓ The most popular place where teleworkers usually teleworked was home. Almost all places, including office space made available by the company, saw a rise in the percentage compared to the previous survey, indicating that options of teleworking places are gradually increasing.
- ✓ 44.6% of teleworkers chose only one place as the place where they usually teleworked, while 55.4% teleworked at two places or more.
- ✓ In terms of when workers teleworked, "on the date and time arranged in advance" rose sharply from the previous survey, while "no particular timing" dropped. This indicates that scheduled teleworking is increasing.

Xymax Real Estate Institute carried out its first questionnaire survey of office workers in December 2016. The teleworking ratio was 9.1% then. Although the figure has not changed substantially in the survey results presented here, changes were seen in the details of telework, such as place and timing.

In terms of where teleworkers usually teleworked, almost all places saw a rise in percentage from the previous survey (**Figure 7**). While "home" (81.8%) continued to be the most popular place, the use of third place offices such as "office space made available by the company"*1 (21.0%) and "office space by service provider"*2 (11.5%) also grew, indicating that the options of places to telework are increasing.

*1 Office space made available by the company: An office of the company other than the office to which the worker usually commutes, office space by service providers contracted by the company, and others.

*2 Office space by service provider: Rental offices for which the worker pays to use, and others.

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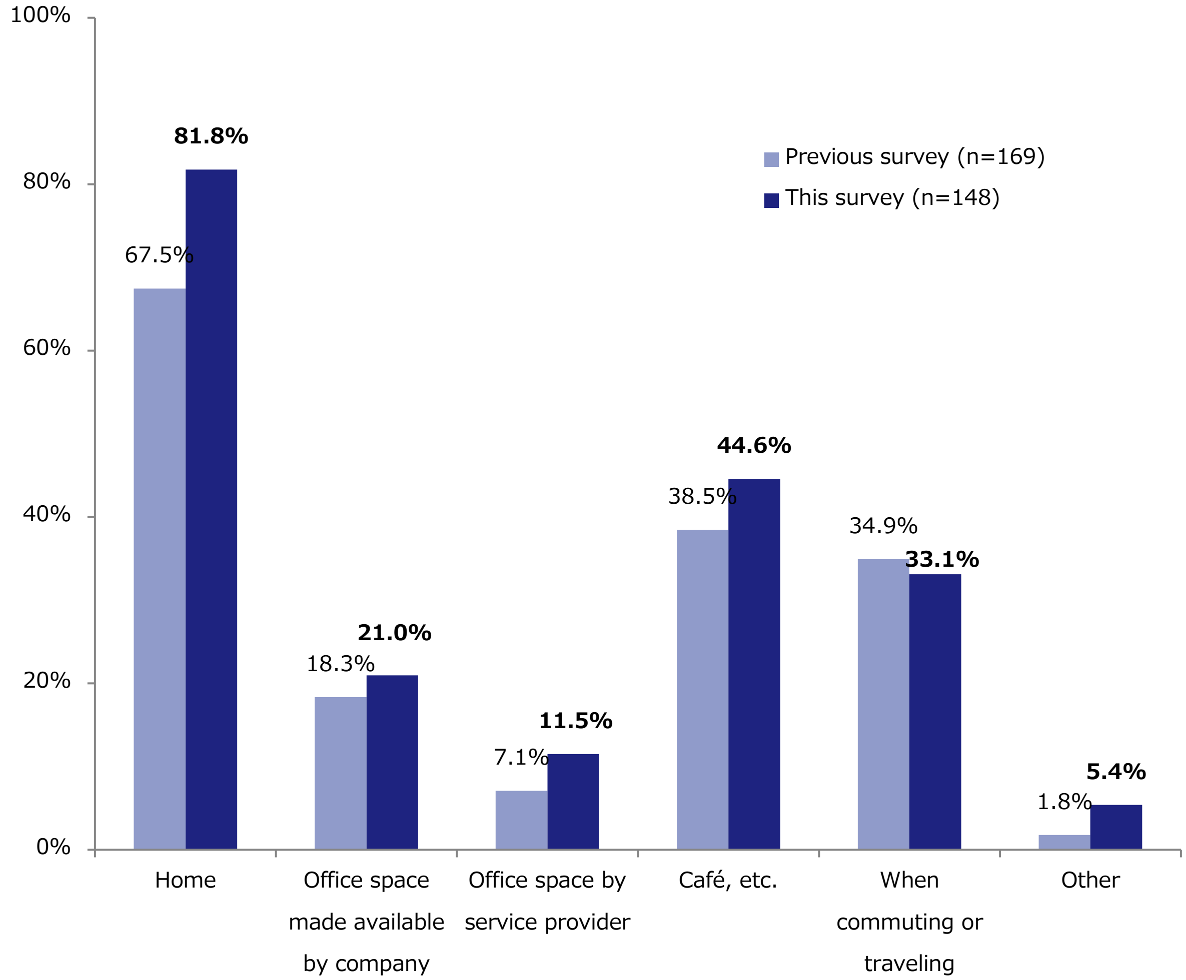
Figure 7: Where teleworkers usually telework (comparison with previous survey)



(Multiple answers)

The results also showed that only 44.6% of total chose just one place as the place where they usually teleworked and that the majority of teleworkers worked at two places or more (**Figure 8**). This indicates that a certain number of workers have several options of places to work, such as the company's main office, home, and a satellite office (office space made available by the company).

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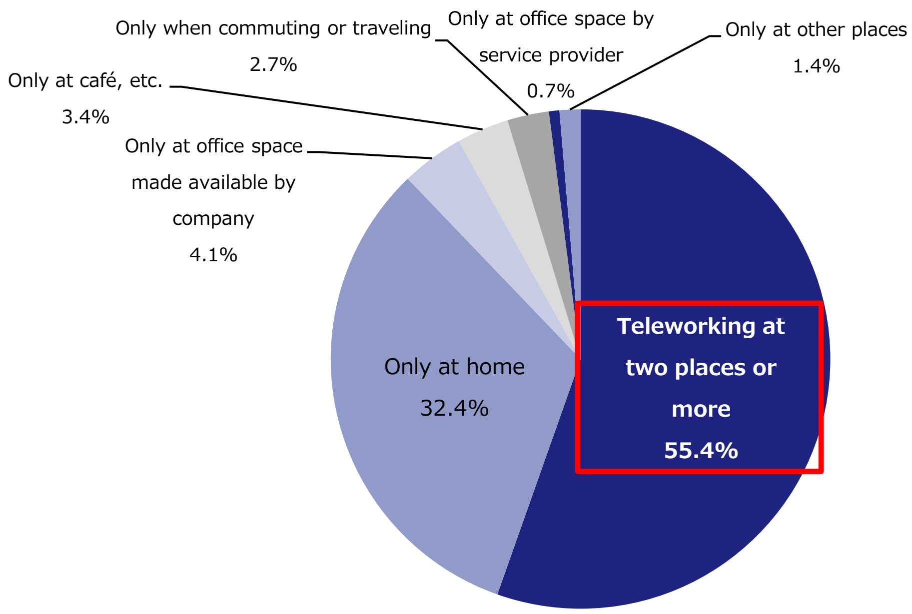
Figure 8: Number of places where teleworkers usually telework



(n=148)

In terms of when the workers have teleworked, "on the date and time arranged in advance" (58.1%) rose significantly from the previous survey (**Figure 9**). On the other hand, "no particular timing" (12.8%) was the only option that dropped, indicating that scheduled teleworking, or in other words teleworking permitted as a system, has increased.

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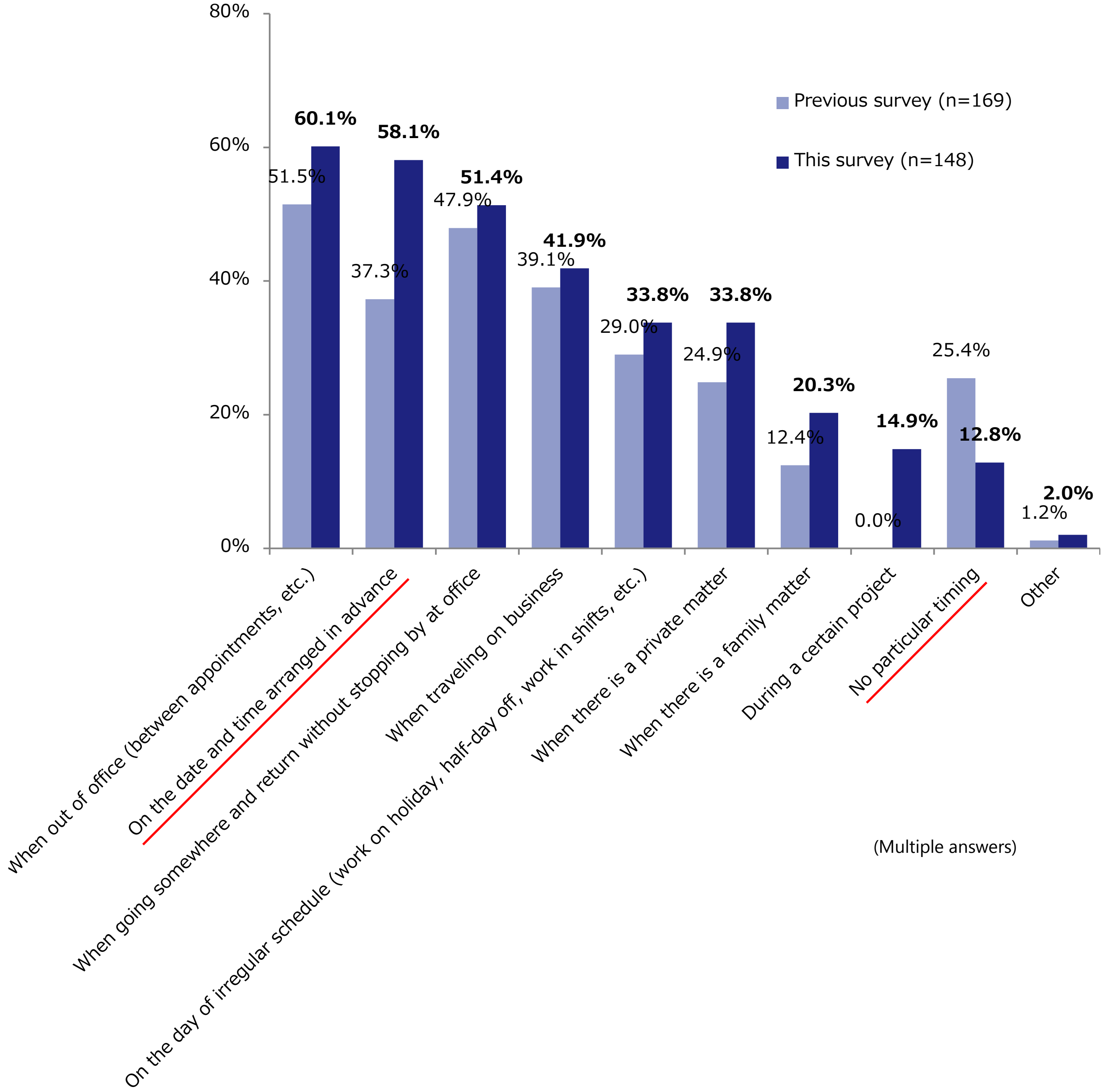
Figure 9: When teleworkers have teleworked (comparison with previous survey)



(Multiple answers)

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PICK UP

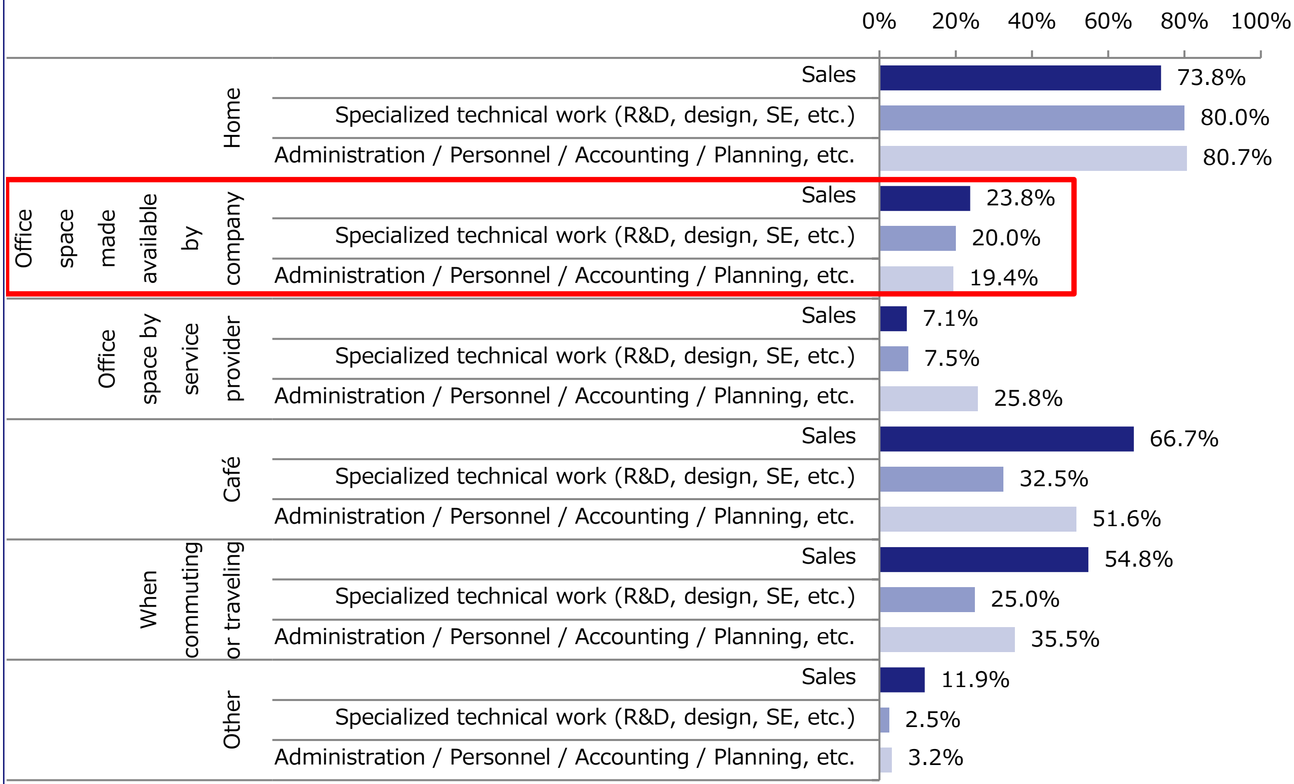
Difference in the place for telework by worker profile

There were different characteristics in the place for telework depending on the worker's profile such as job category and child status.

In terms of job category, teleworkers in the "sales" category worked at home relatively less than those in other categories but more at cafés and when commuting or traveling (**Figure 10**). Furthermore, the usage rate of office space made available by the company[*1] was as high as 20% even among job categories that mostly involve desk work such as "specialized technical work" and "administration / personnel / accounting / planning, etc.," in addition to the "sales" category, which generally requires the worker to be out of the office. This indicates that such office space is used at a constant rate regardless of job category.

*1 Office space made available by the company: An office of the company other than the office to which the worker usually commutes, office space by service providers contracted by the company, and others.

Figure 10: Place for telework by job category



(Sales: n=42; specialized technical work (R&D, design, SE, etc.): n=40; admin/personnel/accounting/planning, etc.: n=31)
(Multiple answers, excerpts of major industries)

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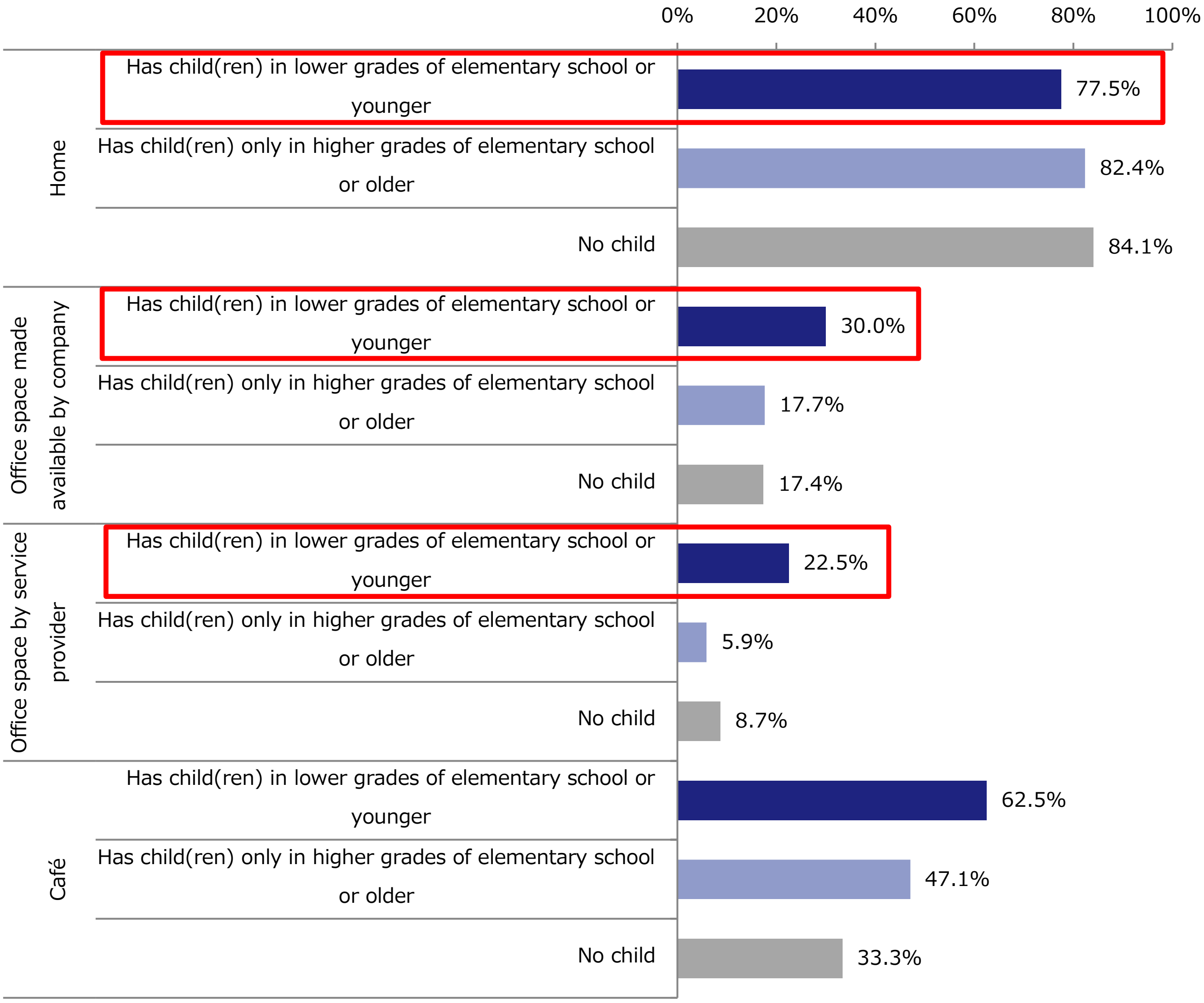
In terms of child status, the group with children in the lower grades of elementary school or younger had a higher usage ratio of "office space made available by the company" and "office space by service provider"*2, but lower in "home" (**Figure 11**). This implies that workers with small children may be having difficulty working at home and prefer third place offices as the place for telework.

As seen in **Figure 6**, the teleworking ratio was the highest in the group with children in the lower grades of elementary school or younger (13.0%), who also showed strong intentions to telework as described later (**Figure 21**). If teleworking at home was difficult for the group with such high needs, providing more third place offices could prompt more teleworking by the age group with small children.

*2 Office space by service provider: Rental offices for which the worker pays to use, and others.

Figure 11: Place for telework by child status



(Has child(ren) in lower grades of elementary school or younger: n=40; has child(ren) only in higher grades of elementary school or older: n=34; no child: n=69)
(Multiple answers)

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✓ There was a gap between the expectations and concerns in telework of those who did not telework and the actual upsides and downsides experienced by those who teleworked.

A comparison of the expectations and concerns in telework of those who did not telework and the actual upsides and downsides experienced by those who teleworked (teleworkers) revealed an interesting trend.

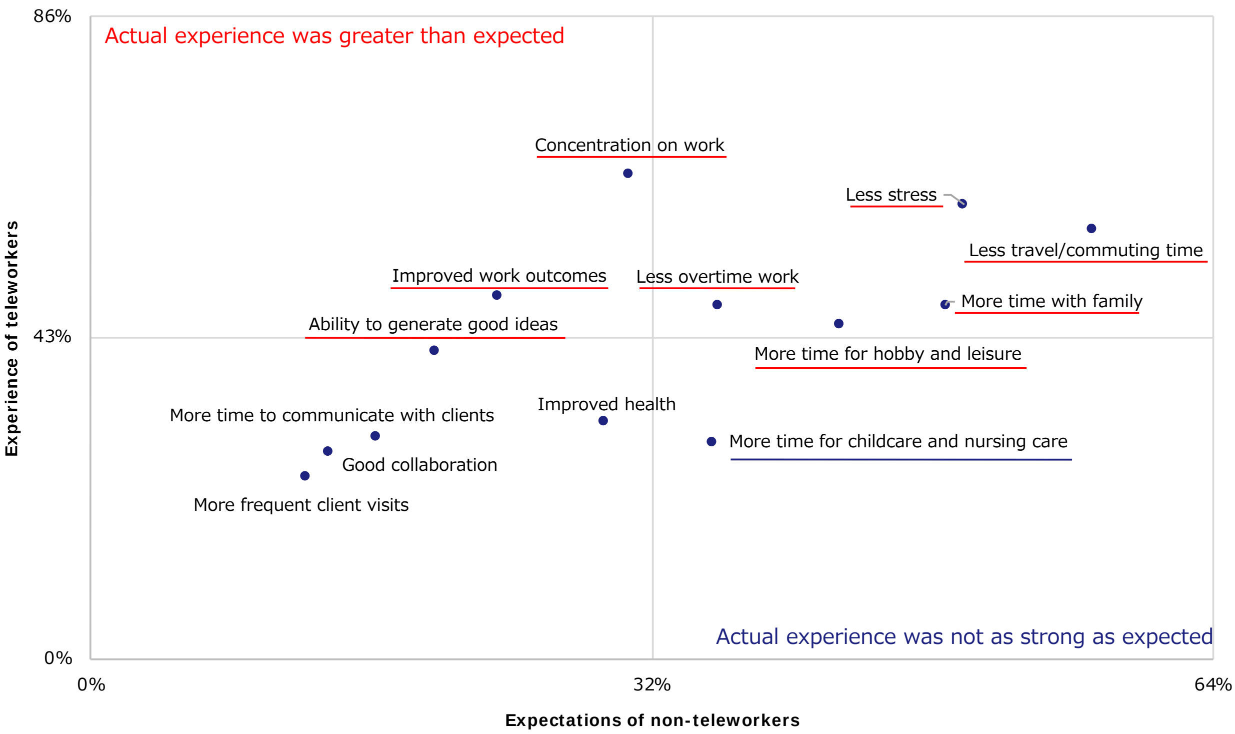
Figure 12 shows the relationship between the expectations and the actual upsides. We asked non-teleworkers to choose what they expected in telework (horizontal scale) and teleworkers to choose the actual upsides they experienced (vertical scale) from among the same choices.

When drawing a central line at the average value of both the horizontal and vertical scales, the upper right (first quadrant) included "less stress," "less travel/commuting time," "more time with family," "less overtime work," and "more time for hobby and leisure." This implies that these upsides were actually experienced as expected.

Attention should be paid to the upper left (second quadrant). It can be interpreted that upsides such as "concentration on work," "improved work outcomes," and "ability to generate good ideas" were actually experienced more than was expected. On the other hand, "more time for childcare and nursing care" in the lower right (fourth quadrant) seemed not to have been actually experienced as strongly as expected.

Figure 12: Expectations of non-teleworkers x experience of teleworkers (upside)

(Average of expectations: 31.9%; average of experience: 42.7%)



(Non-teleworkers: n=1,683; teleworkers: n=148)

(Multiple answers)

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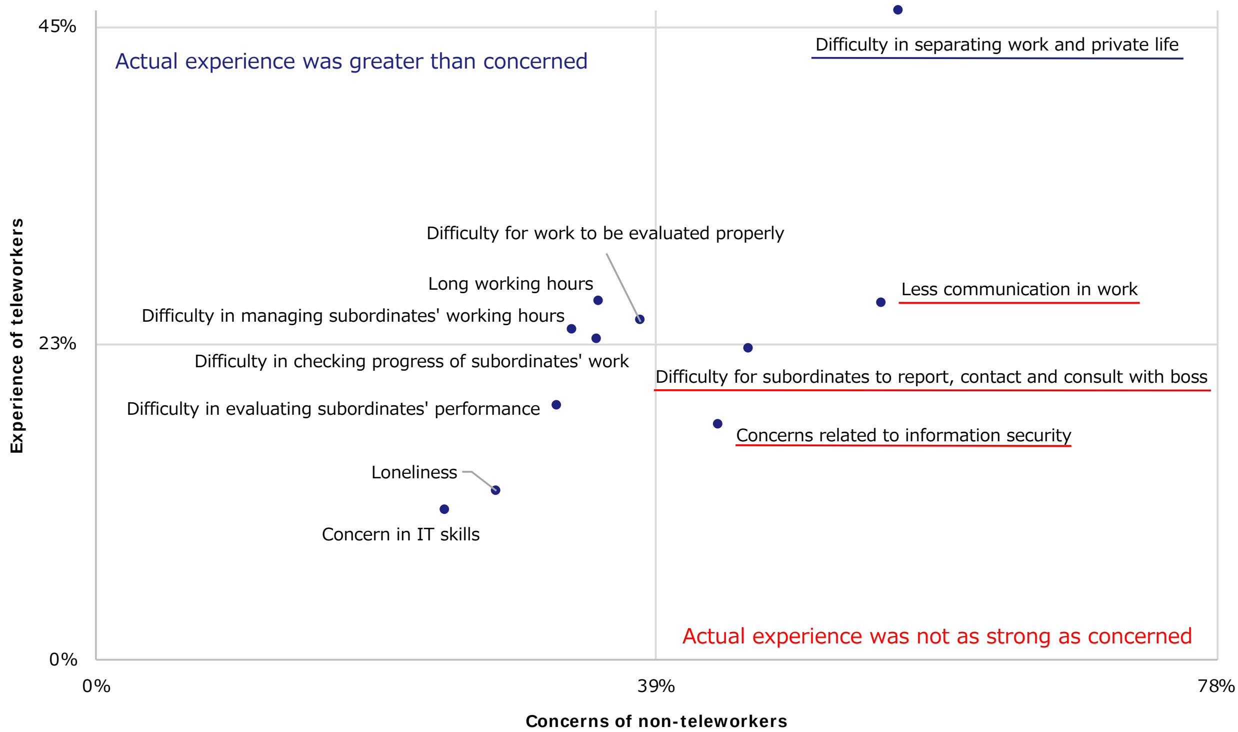
In terms of the relationship between concerns and the actual downsides, it is worth noting that the average score of concerns of non-teleworkers was 38.6% while the average score of the actual downsides experienced by teleworkers was 22.7%, and that actual experience (scores of the vertical scale) was less than concerns (scores of the horizontal scale) in all downsides (**Figure 13**). In other words, the actual downsides experienced by teleworkers were not as strong as were concerned.

In particular, “less communication in work,” “difficulty for subordinates to report, contact and consult with boss,” and “concerns related to information security” in and near the lower right (fourth quadrant), which were strong concerns of non-teleworkers, seemed not to have been actually experienced by many teleworkers. Instead, we found that a majority of teleworkers experienced a strong labor load-related downside of “difficulty in separating work and private life.” This downside may be solved in the future with the progress of the establishment of teleworking places and operating methods as well as awareness-raising among workers.

Figure 13: Concerns of non-teleworkers x experience of teleworkers (downside)

(Average of concerns: 38.6%; average of experience: 22.7%)



(Non-teleworkers: n=1,683; teleworkers: n=148)

(Multiple answers)

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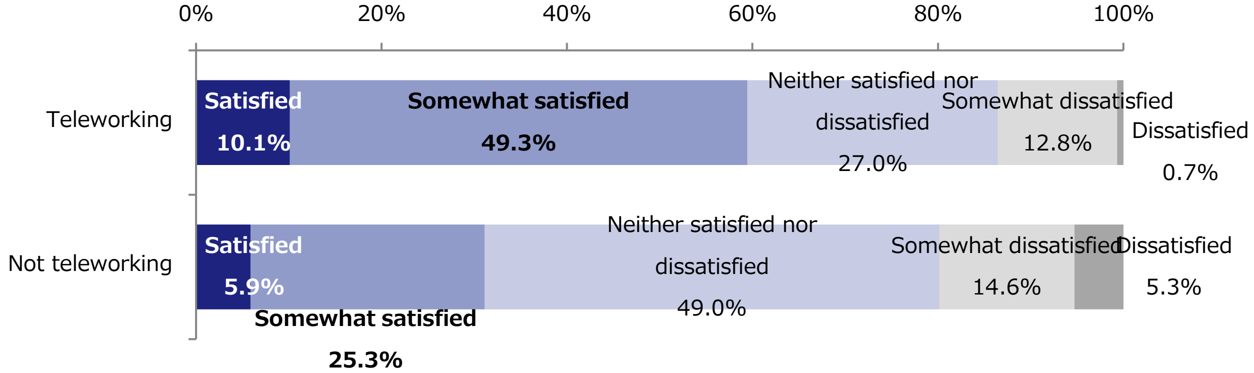
2. Workplace and satisfaction

- ✓ Teleworkers have greater satisfaction in their workplace environment than non-teleworkers.
- ✓ Certain conditions related to workplace environment (especially in the intangible aspects) may have influenced the satisfaction of workers.

The percentage of "satisfied" and "somewhat satisfied" responses in the current workplace environment* among the group of teleworkers (59.4%) was nearly double that among the group of non-teleworkers (31.2%) (**Figure 14**). The ability provided by teleworking to decide where to work at the worker's discretion may have led to teleworkers' high level of satisfaction.

*Here "workplace environment" refers to all places workers usually work, such as the company's main office, home, and third place offices.

Figure 14: Satisfaction in the workplace environment by teleworking status



Then, what would be the specific conditions of a workplace environment that improve workers' satisfaction? We presented several workplace conditions in both the tangible side (e.g. facility, building specifications) and the intangible side (e.g. elements that involve workstyles) and asked how much each of the conditions applied.

Figure 15 is a table and scatter diagram that compare the percentage of "applies" and "somewhat applies" responses of the satisfied (those who replied that they were either "satisfied" or "somewhat satisfied" in their current workplace environment) and the dissatisfied (those who replied that they were either "dissatisfied" or "somewhat dissatisfied"). The multiple of the satisfied vs the dissatisfied indicates the disparity between the two. The central lines of the horizontal and vertical scales of the scatter diagram are the average value of the scales.

A comparison of the percentage of responses of the satisfied and the dissatisfied shows that the satisfied had a higher ratio of "applies" and "somewhat applies" responses than the dissatisfied in all conditions. In other words, the conditions presented here may have influenced workers' satisfaction in their workplace environment.

The disparity between the satisfied and the dissatisfied was especially large in such intangible conditions (with a red circle) as "can work comfortably," "improves productivity," "improves motivation," and "increases engagement in the organization." These conditions are concentrated in the upper side of the scatter diagram. It may be able to assume that these intangible elements have a greater impact on workers' satisfaction than tangible elements such as facilities and building specifications.

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Figure 15: Evaluation of the current workplace environment by degree of satisfaction

(●: tangible conditions ●: intangible conditions)

Rank (of multiple)	Evaluation of current workplace environment	Percentage of respondents who chose "Applies" or "Somewhat applies"		Multiple (Satisfied vs dissatisfied)
		Satisfied	Dissatisfied	
1	● Can work comfortably	60.5%	14.7%	4.1
2	● Improves productivity	37.1%	9.9%	3.8
3	● Improves motivation	37.9%	10.2%	3.7
4	● Increases engagement in the organization	28.9%	7.9%	3.7
5	● Improves work-life balance	38.1%	11.3%	3.4
6	● Improves work efficiency	42.5%	12.7%	3.3
7	● Promotes innovation / Leads to creation of new business	20.4%	6.2%	3.3
8	● Refreshing	40.2%	12.7%	3.2
9	● Induces collaboration	20.1%	6.5%	3.1
10	● Reduces or improves efficiency of work hours	34.3%	11.9%	2.9
11	● Easier to balance work and childcare/nursing care	28.4%	10.7%	2.7
12	● Invigorates communication within the company	41.3%	16.1%	2.6
13	● High-grade building exterior and common areas	30.6%	12.4%	2.5
14	● Promotes health	29.1%	12.4%	2.3
15	● Building is relatively new	30.1%	14.1%	2.1
16	● Convenient location	70.6%	39.5%	1.8
17	● Good cleaning/sanitation and maintenance conditions of building	51.8%	29.1%	1.8
18	● High seismic capacity (new standards, seismic isolation, vibration control, etc.)	42.3%	24.3%	1.7
19	● Building is large	39.1%	22.9%	1.7
20	● High security performance	50.0%	31.6%	1.6

(Multiple answers; satisfied: n=612; dissatisfied:n=354)

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3. The needs for telework

3-1. Intentions toward telework

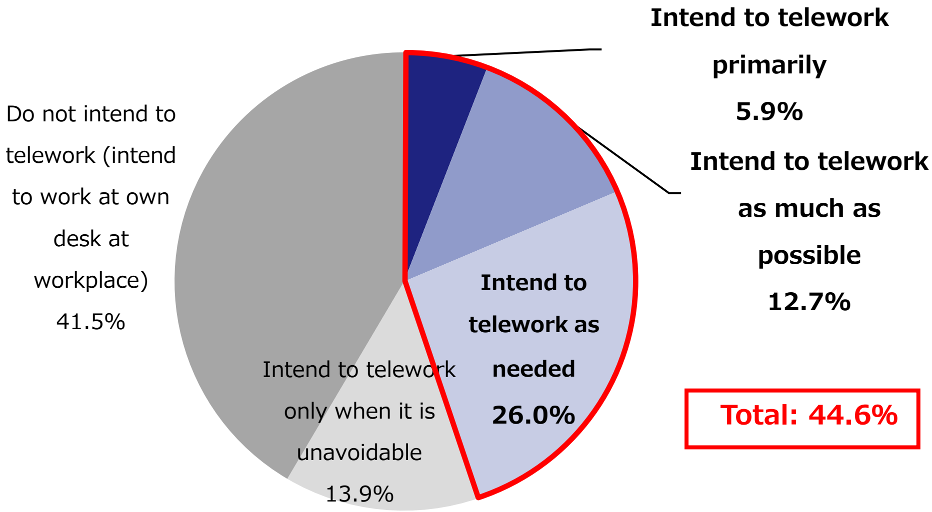
- ✓ 44.6% of respondents had positive intentions toward telework. Intentions were especially high among men aged 20–24 and 40–44 and women aged 25–29 and 30–34. In terms of child status, intention was highest among those with children in lower grades of elementary school or younger.
- ✓ The place where respondents wanted to telework the most in the future was home. All places saw slight increases from the previous survey.
- ✓ 54.6% of respondents replied that the impediment to promoting telework in the future was "lack of system that allows telework." Teleworkers particularly felt impediments in the places for telework, such as "lack of/few places for telework apart from home (third place office)" and "own burden of costs for using office space by service providers."

8.1% of respondents replied that they currently teleworked, but what about their future intentions?

We asked all respondents including those who did not telework about their intentions to telework as the ideal workstyle without being bound to their current work. The result showed that those who had positive intentions toward telework ("intend to telework primarily," "intend to telework as much as possible," and "intend to telework as needed") accounted for 44.6% in total (**Figure 16**). This indicates that, in contrast with the current teleworking ratio, not a few people had potential needs for teleworking.

On the other hand, the survey revealed that 41.5% did not intend to telework. This may imply that offices as a place where workers gather to work will remain in demand and continue to be required in a form suited to the times, even if the use of telework increased in the future.

Figure 16: Intentions toward telework



(n=1,831)

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In terms of profile, what kind of people had positive intentions toward telework? Relatively high intentions (more than 50%) were seen among men aged 20–24 and 40–44, and women aged 25–29 and 30–34 (**Figure 17**). In terms of industry, "information & communications" and "manufacturing," which had high teleworking ratios, also had high intentions (**Figure 18**). Similar results were seen in job categories, with "specialized technical work such as R&D, design, and system engineering" and "sales," which had high teleworking ratios, ranking top (**Figure 19**).

Figure 17: Intentions toward telework by gender and age

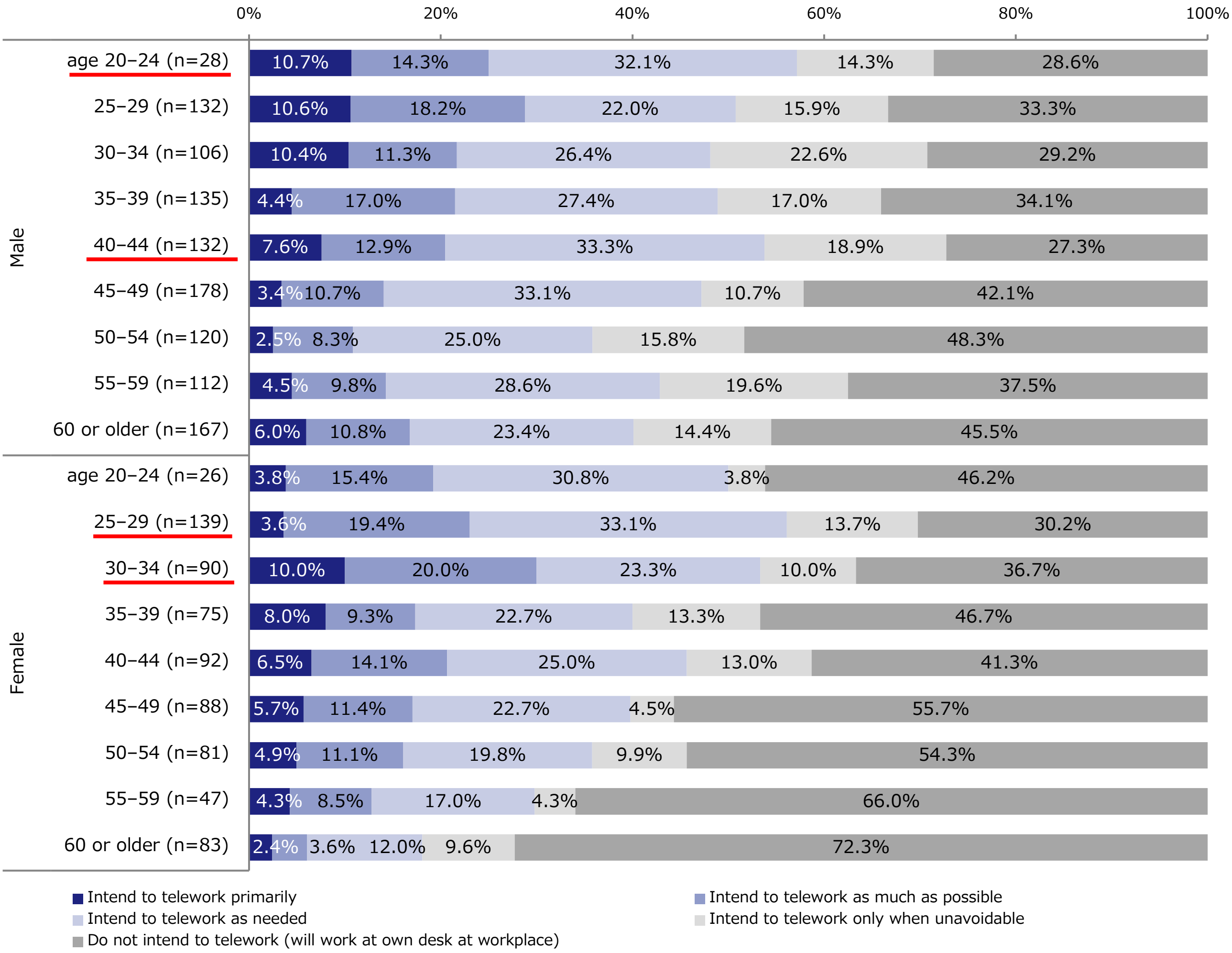

Figure 18: Intentions toward telework by industry (Excerpts of major industries)

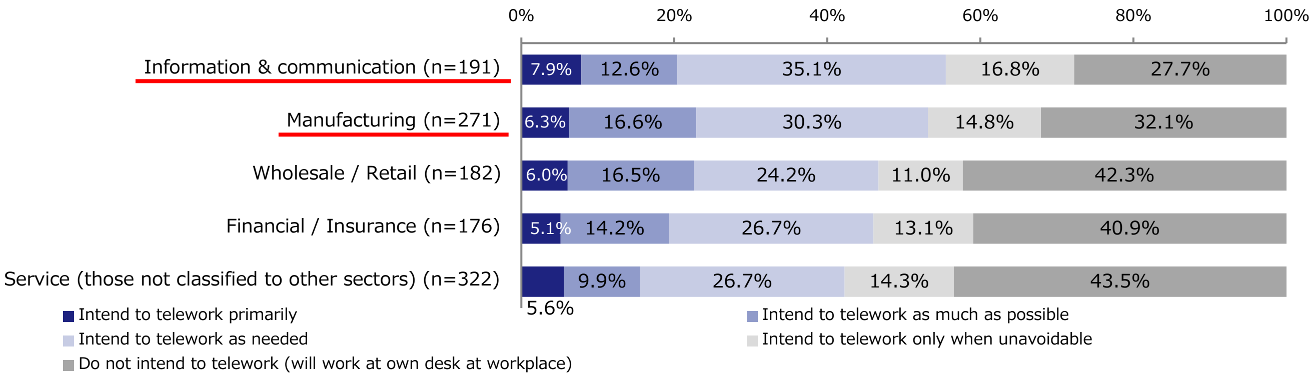

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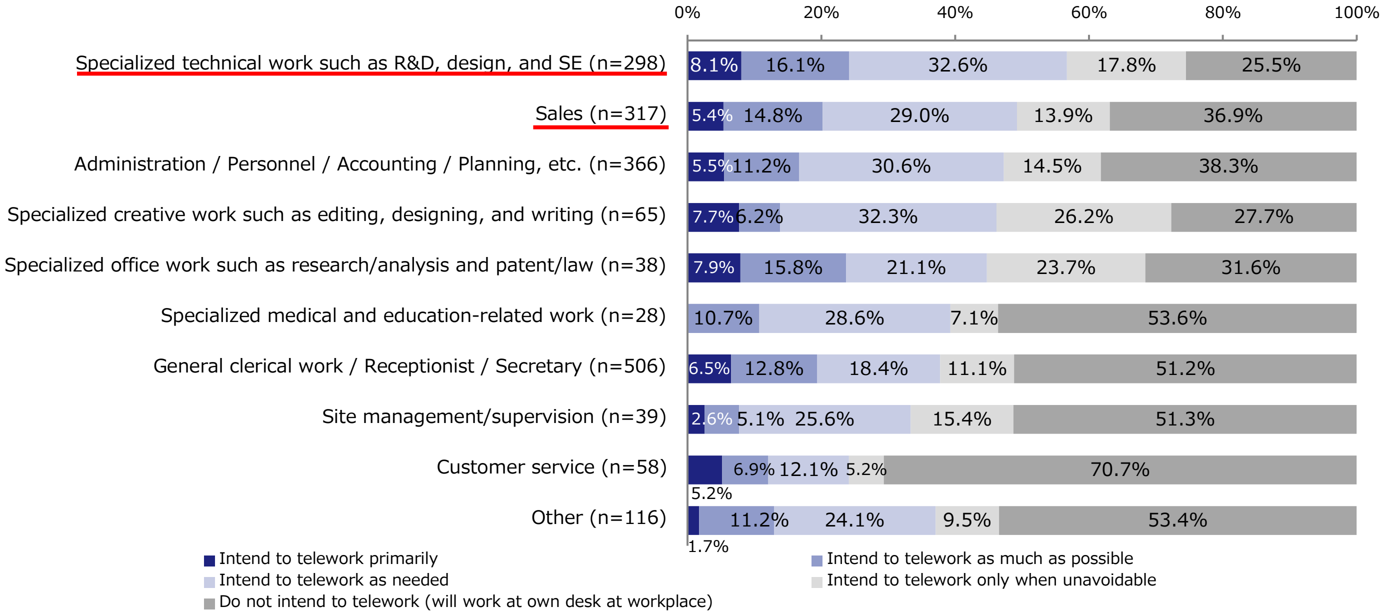
Figure 19: Intentions toward telework by job category



In terms of the form of employment, "management post," which showed a high teleworking ratio, also had the highest intentions (**Figure 20**). In terms of child status, the group with childrend in the lower grades of elementary school or younger had the highest intentions, implying that the burden of childcare is related to the need for teleworking (**Figure 21**).

Figure 20: Intentions toward telework by form of employment

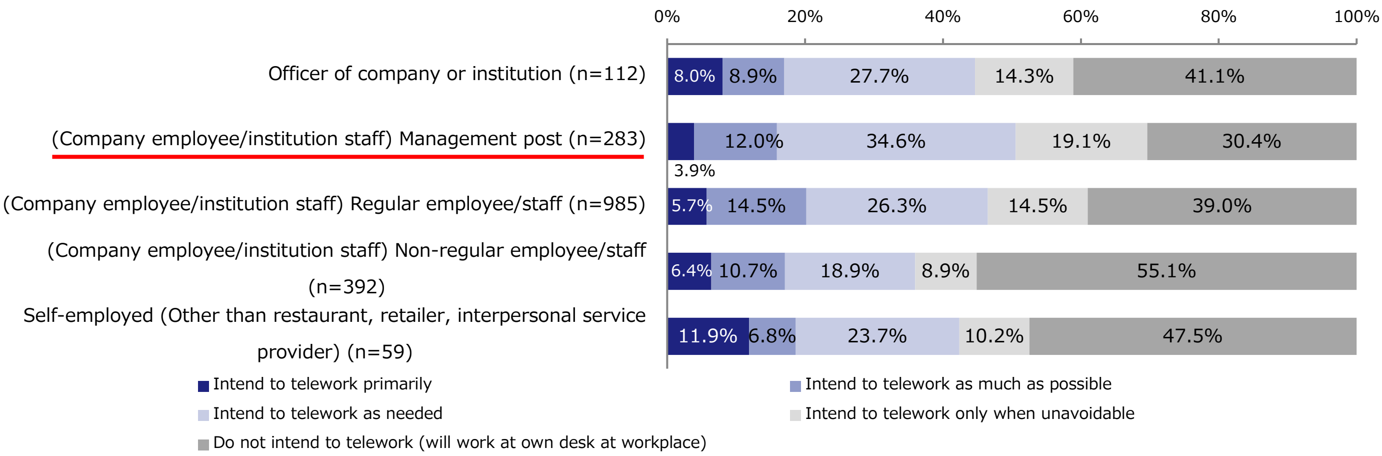
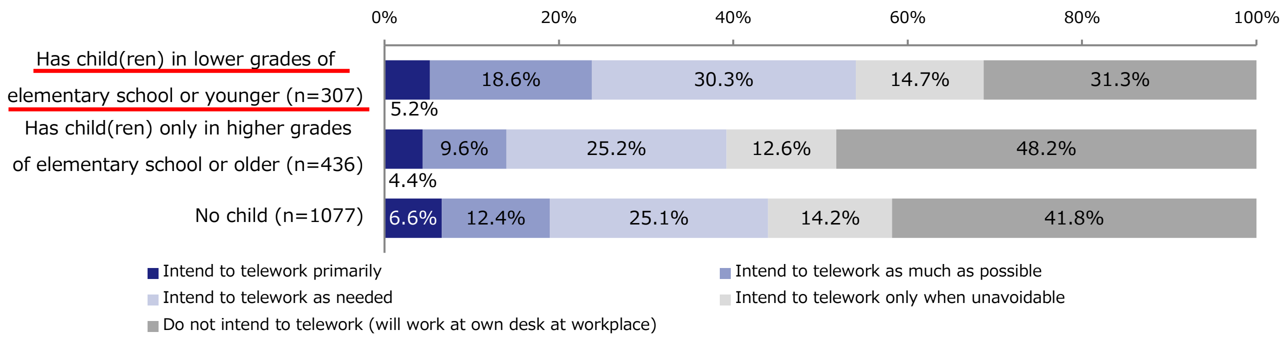


Figure 21: Intentions toward telework by child status



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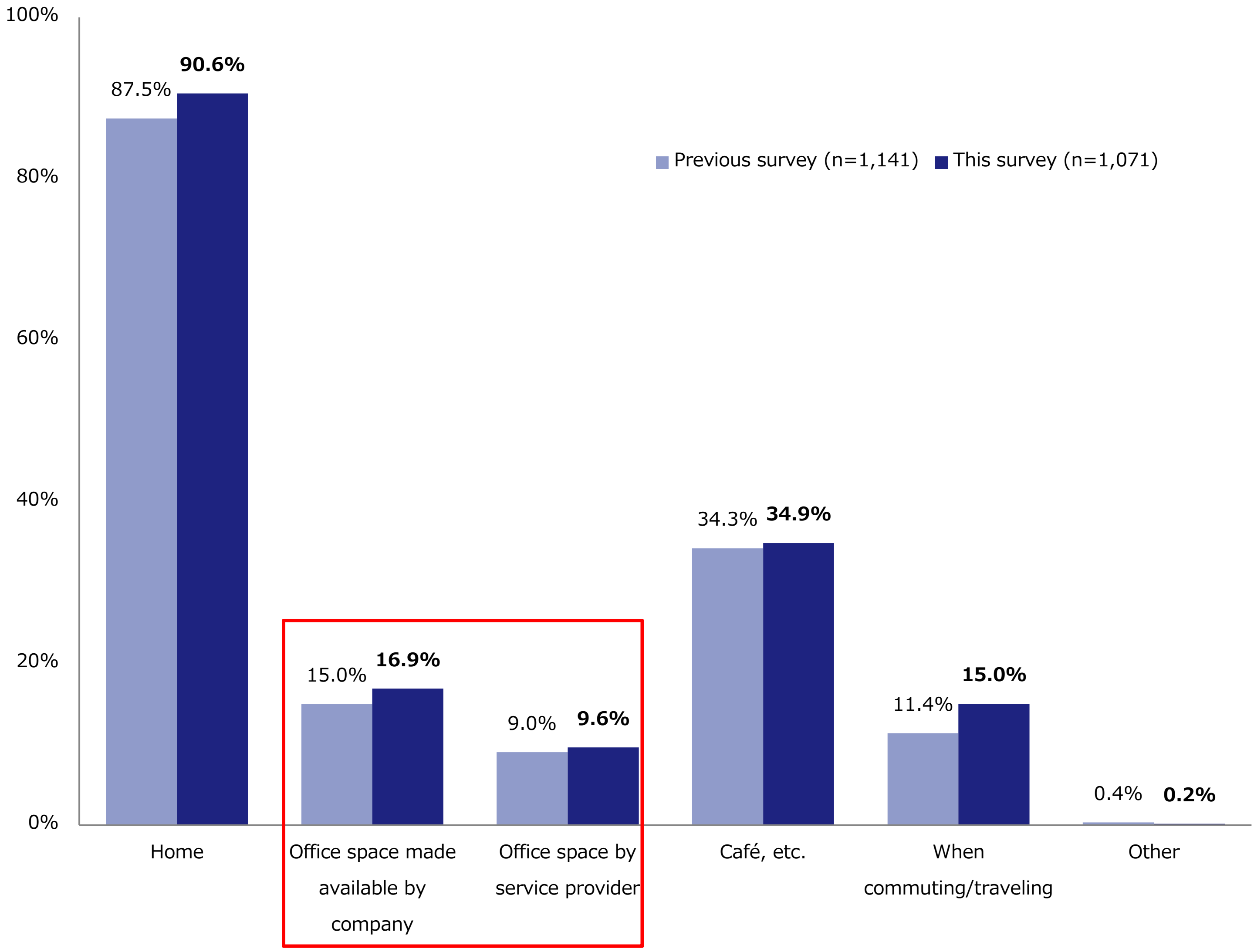
Furthermore, we asked those with positive intentions toward teleworking to choose where they wanted to telework. The scores increased slightly in all places except for "other" compared to the previous survey (**Figure 22**). Intentions to use third place offices such as office space made available by the company[*1] (16.9%) and office space by service provider[*2] (9.6%) showed flat growth/slight increase, suggesting that the trend of diversifying workplaces may accelerate.

*1 Office space made available by the company: An office of the company other than the office to which the worker usually commutes, office space by service providers contracted by the company, and others.

*2 Office space by service provider: Rental offices for which the worker pays to use, and others.

Figure 22: Place where respondents want to telework (comparison with previous survey)



(Multiple answers)

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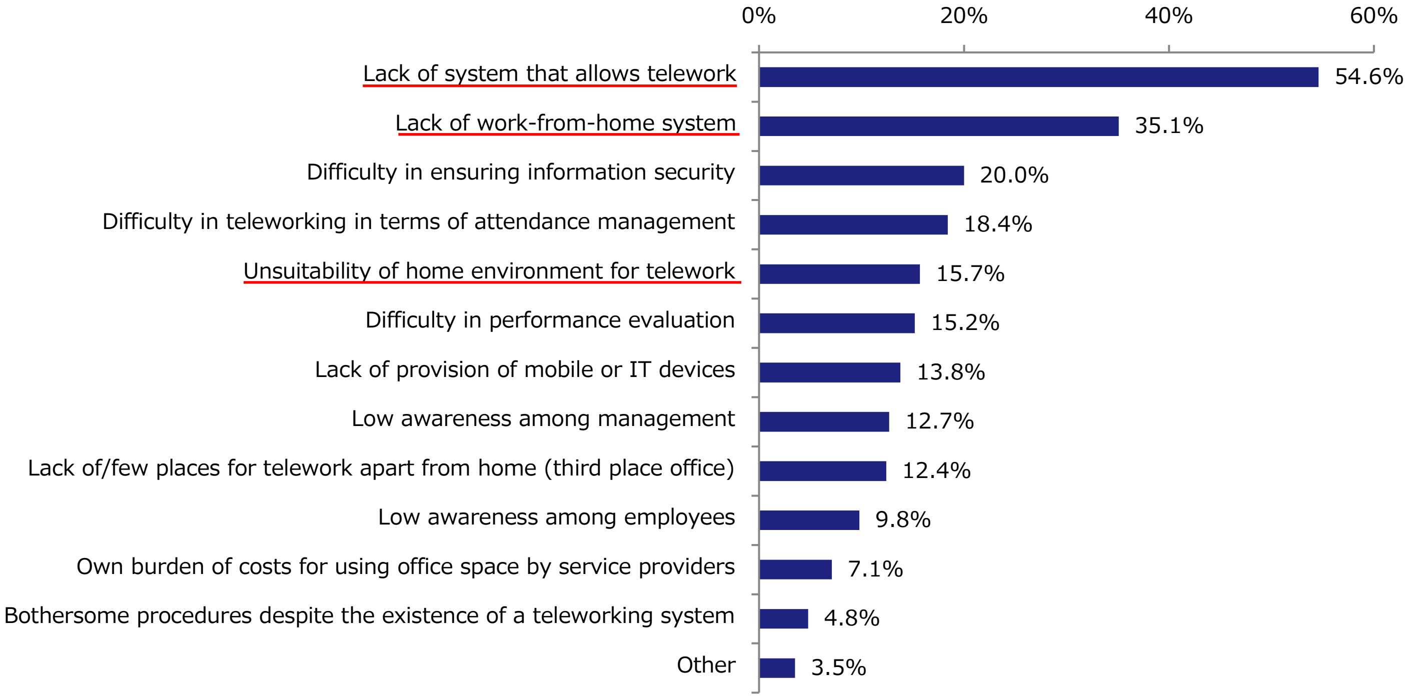
When we asked all respondents what the impediments to promoting workstyles that used teleworking were, the top replies were factors related to the lack of a work system, namely "lack of system that allows telework" (54.6%) and "lack of work-from-home system" (35.1%) (**Figure 23**). Some also pointed out a factor related to the teleworking place ("Unsuitability of home environment for telework").

Figure 23: Impediments to promoting telework



(Multiple answers; n=1,831)

Figure 24 is a comparison of the results of teleworkers and non-teleworkers.

Regarding the two work system-related impediments mentioned above, non-teleworkers showed significantly higher percentages in both items. This implies that a certain number of workers are prevented from teleworking due to the lack of a system at their workplace.

On the other hand, the impediments chosen more by teleworkers than by non-teleworkers are framed in red. The score of "lack of/few places for telework apart from home (third place office)" as an impediment was 1.9 times more among teleworkers (22.3%) than among non-teleworkers (11.5%), while the difference in the score was 2.6 times in "own burden of costs for using office space by service providers." As such impediments related to the place for telework are resolved, teleworking by current teleworkers may expand, leading to more effective telework.

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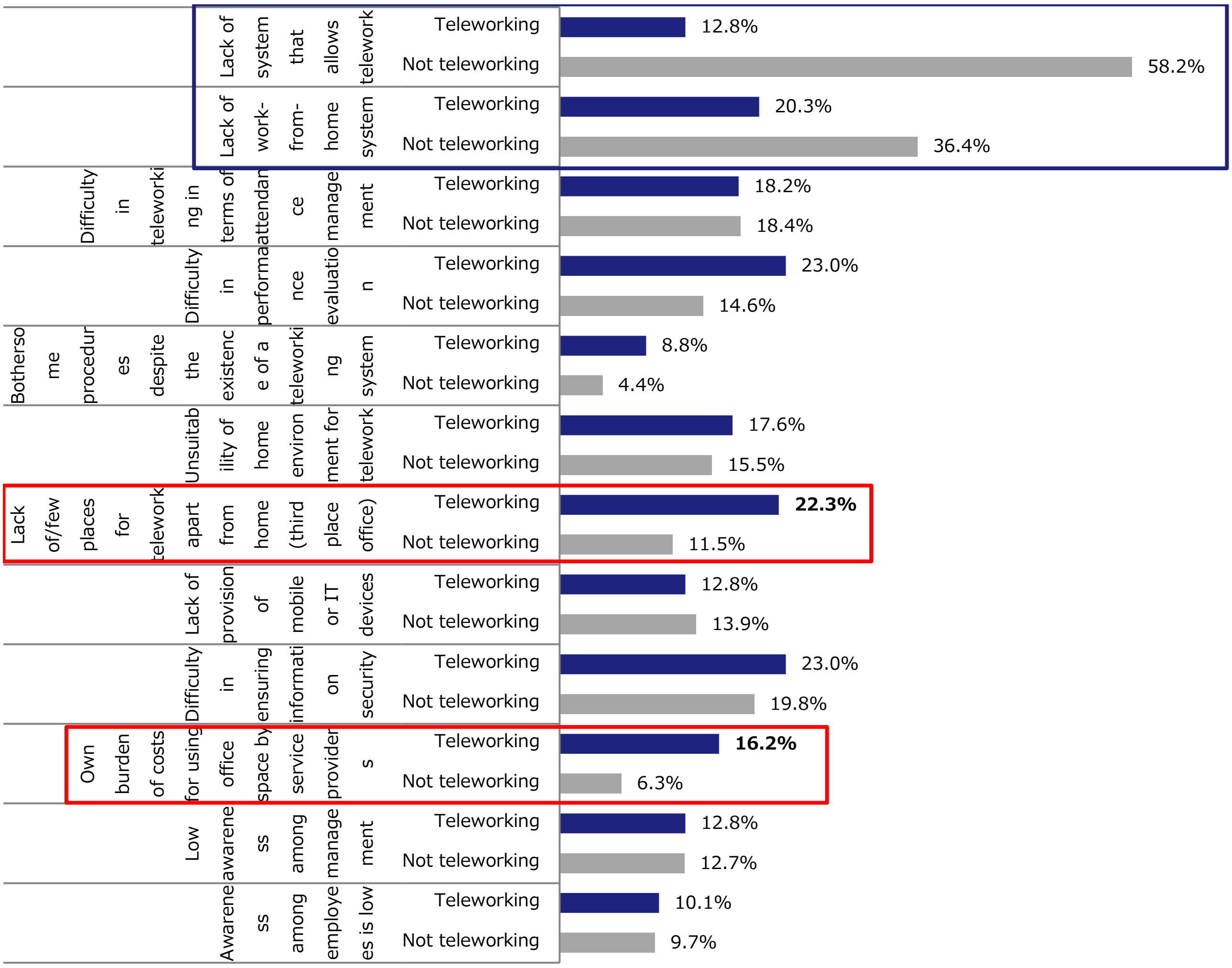
Figure 24: Impediments to promoting telework by teleworking status



(Multiple answers; teleworkers: n=148; non-teleworkers: n=1,683)

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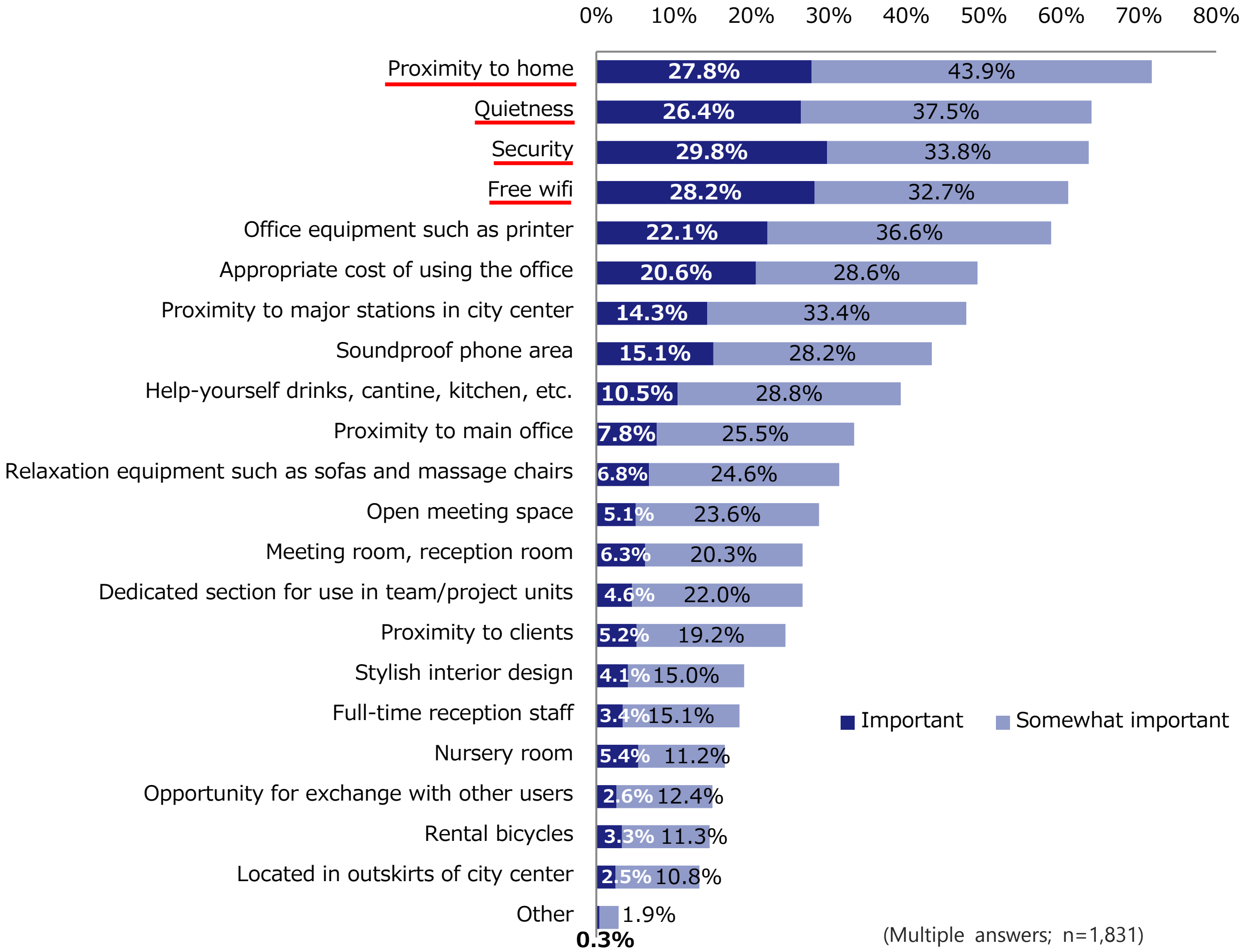
3-2. Needs toward the place to work

- ✓ The top reply as to what was important in using a third place office was "proximity to home."
- ✓ In terms of respondents' interest in using the five types of third place offices, both men and women aged 25–29 and 30–34 had high interest in "office with support features for workers with small children," with female respondents in particular showing higher interest than in other types. Interest in the other four types was relatively higher among the younger age groups.

Third place offices such as rental offices and shared offices have been increasing their presence in recent years as the third workplace after companies' offices and home. Third places offices provided by providers to companies and used by the employees of client companies are also on the rise. What kind of needs do workers, the actual users, have toward third place offices? We attempted to find out in this survey.

We first asked respondents what they placed importance in when using a third place office. The top reply was "proximity to home" (71.7%; "important" and "somewhat important" combined) (**Figure 25**), followed by matters related to comfort of the work environment, such as "quietness" (63.9%), "security" (63.6%), and "free wifi" (60.9%).

Figure 25: Points of importance in using a third place office



(Multiple answers; n=1,831)

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We then asked their interest in using the following five major types of third place offices.

Five major types of third place offices

(1)

(1) Touch-down type (mainly used by individuals)

Area, period ・Major office area in city center. Irregular, one-off use.

Situations of use ・Salespersons drop by while out of the office or when going somewhere and return without stopping by at office, and work in the same way as in the office.

・Concentrate by oneself on paper work, etc.

・Can choose a convenient place for each occasion and use immediately.

(2)

(2) Project room type (used in team units)

Area, period ・Major office area in city center. Multiple month or annual contract.

Situations of use ・Fixed-term use for system development or projects.

・ Used not only when working with internal personnel but also with external personnel.

(3)

(3) Shared satellite type (used in company units)

Area, period ・Suburban residential area. Multiple month or annual contract.

Situations of use ・Jointly used by several companies as a satellite office.

・Exclusive sections for companies (with dedicated lines) and common area

・Employees living nearby can gather to work.

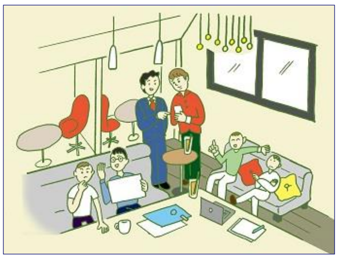
(4)

(4) Office with support features for workers with small children

Area, period ・Suburban residential area. Irregular, one-off use.

Situations of use ・Comes with a nursery space and can be used by employees with small children as needed on an individual and one-off basis.

(5)



(5) Co-working type

Area, period ・Major office area in city center.

Situations of use ・Jointly used by people from various industries and professions, inducing collaboration and innovation.

・Not only corporate but also individual contracts are often possible.

Figure 26 shows respondents' interest in using each type of office by gender and age.

The first thing we notice is that the younger age groups tend to have higher interest in all office types. In particular, the interest of men aged 20–24 in using "(1) touch-down type," which had high scores overall, was extremely high at 60.7% ("interested in using" and "somewhat interested in using" combined). Interest in "(4) office with support features for workers with small children" was high among men and women aged 25–29 and

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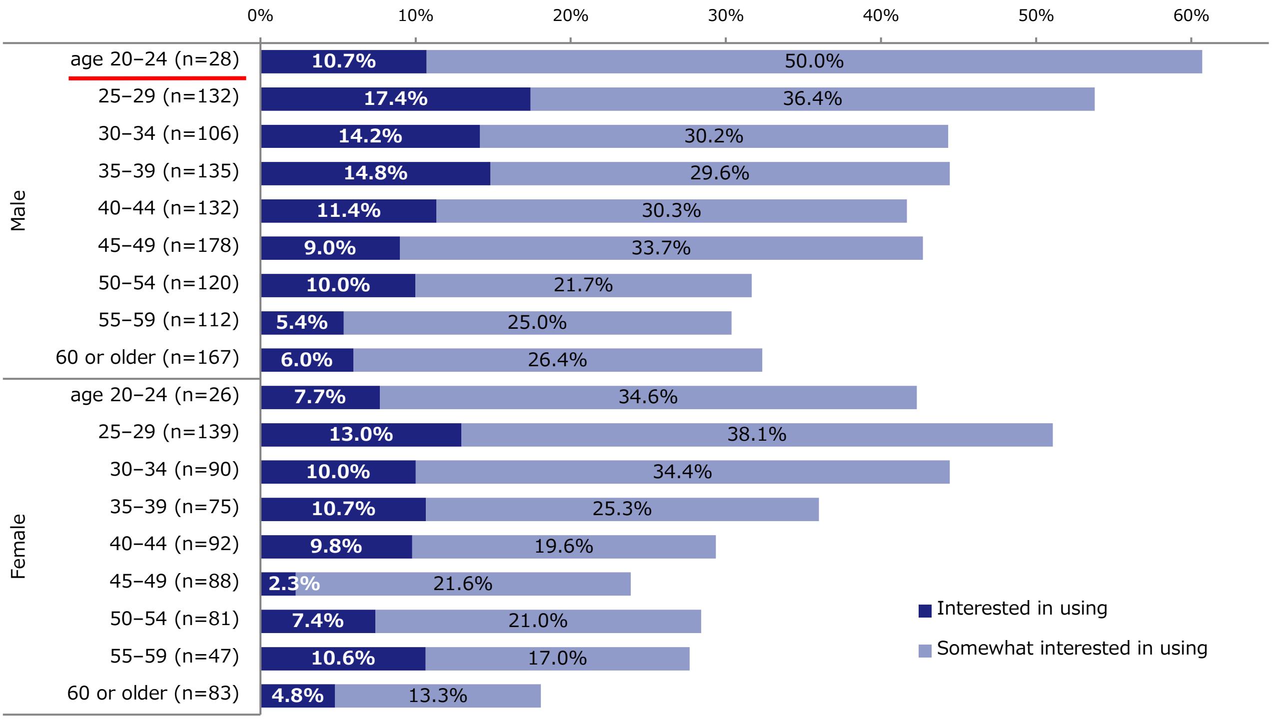
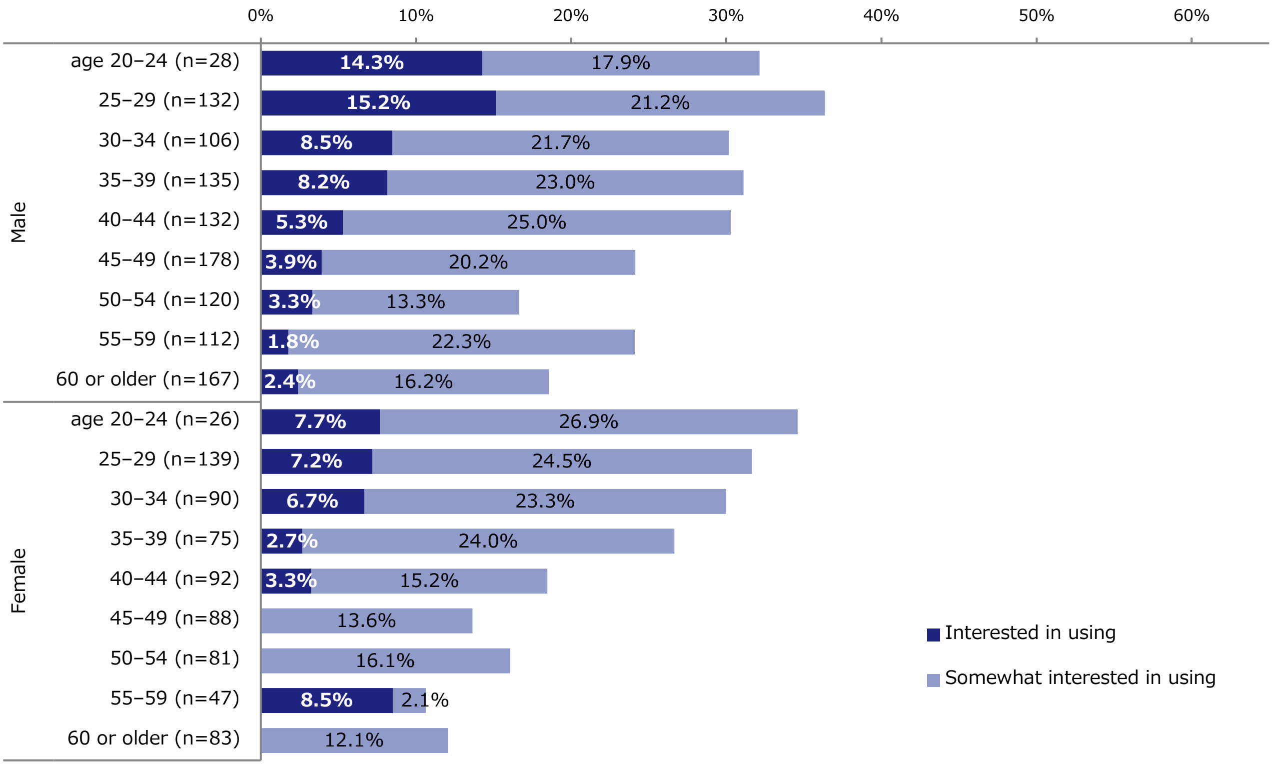
30–34, with female respondents in particular showing higher interest than in other types. This is probably related to the fact that these age groups are in the midst of child-rearing or may soon become so.

Figure 26: Interest in using third place offices by gender and age group

1. Touch-down type (mainly used by individuals)



2. Project room type (used in team units)



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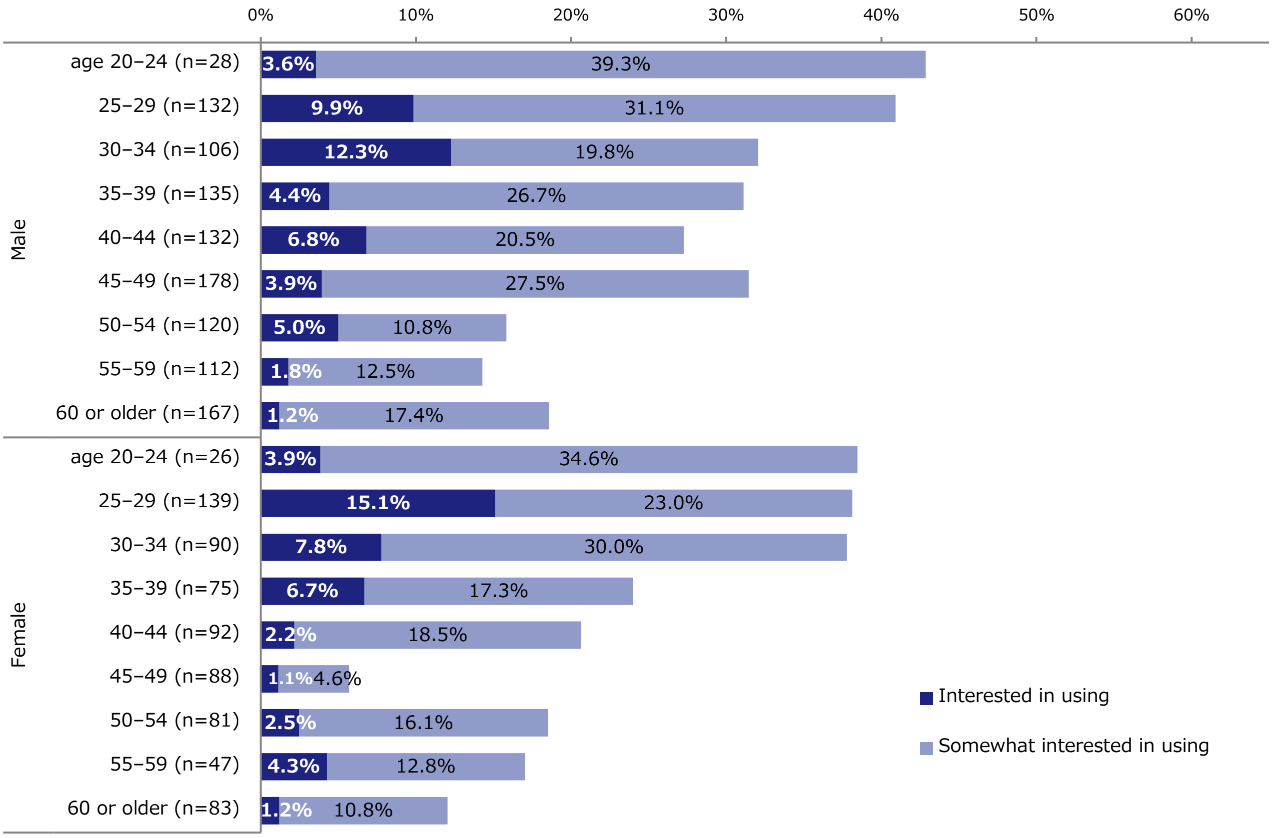
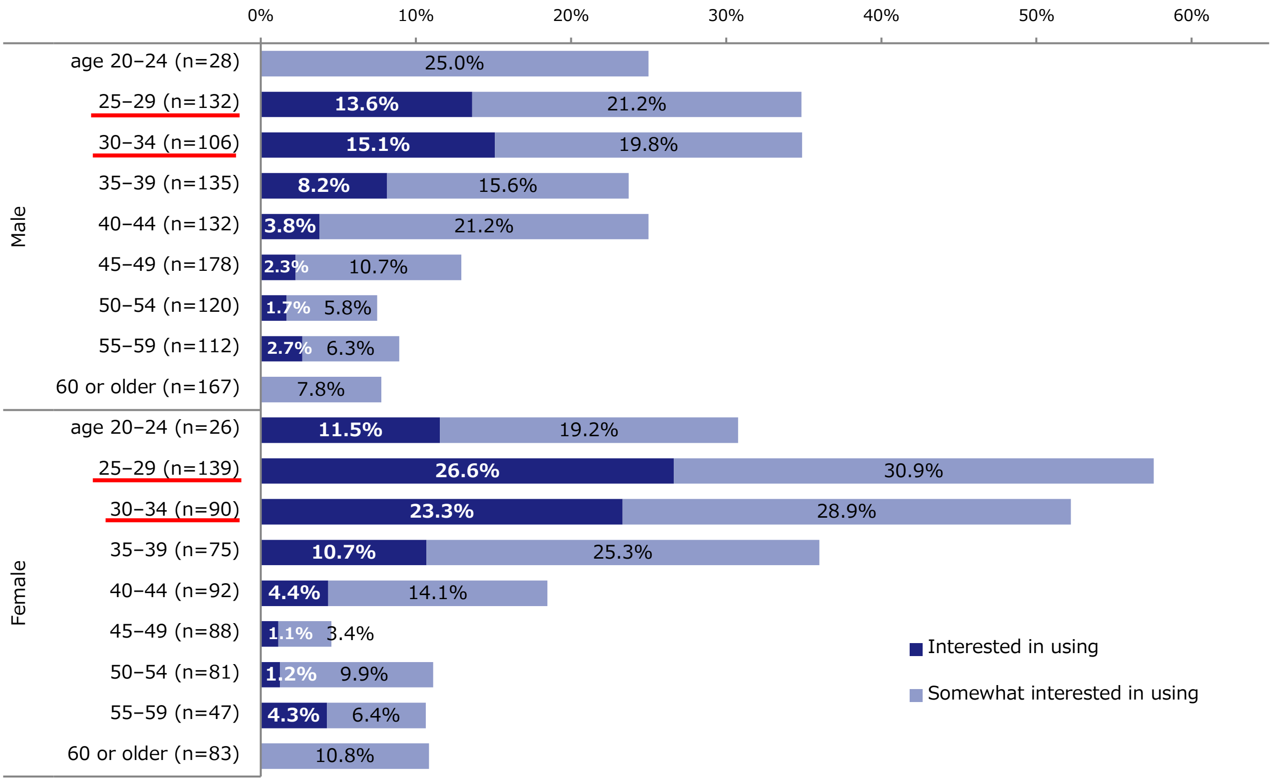
3. Shared satellite type (used in company units)



4. Office with support features for workers with small children



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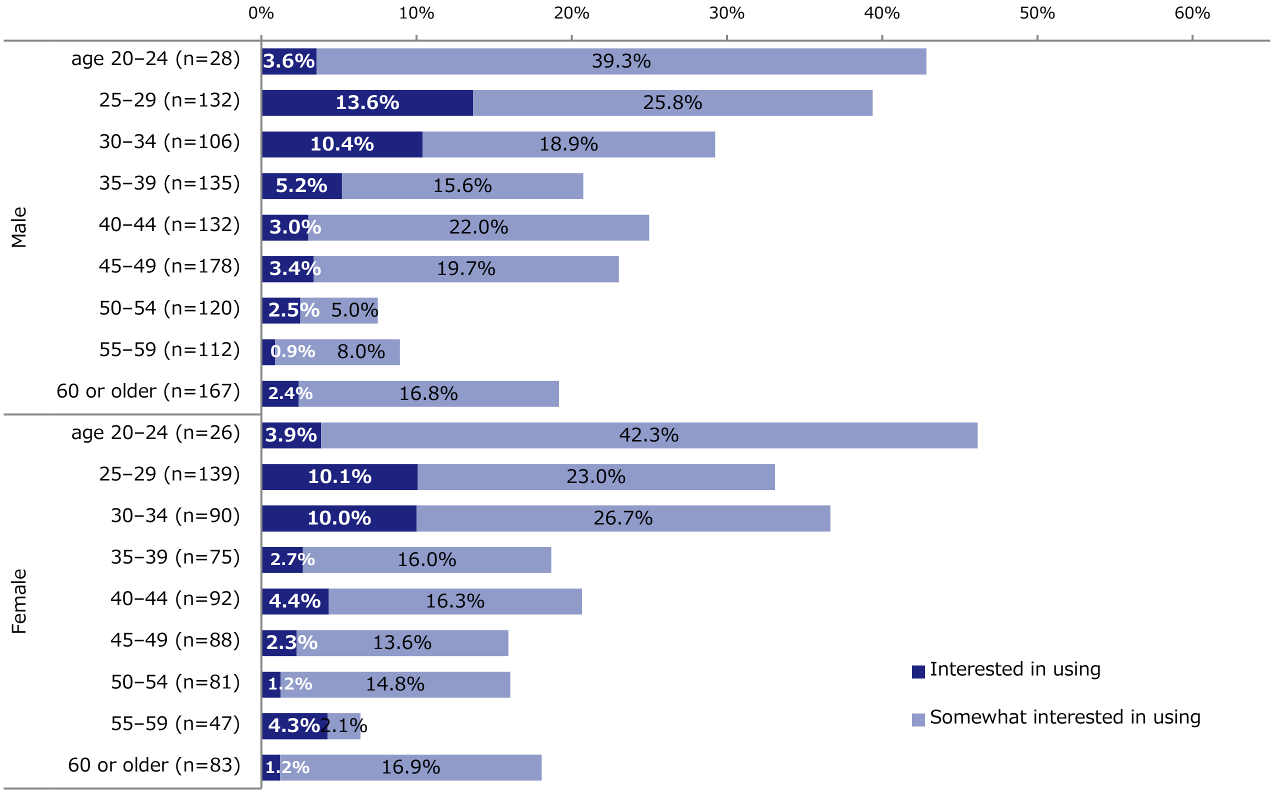
5. Co-working type



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4. Summary

In this report we examined office workers' behaviors and needs by focusing on workplaces in particular, with the aim of understanding the current situation and foreseeing the future of telework. We have thus found gradual changes in the situations surrounding telework.

First of all, we discovered that the options of places for telework have increased and that a majority of teleworkers teleworked at two places or more. Such options included third place offices in addition to home, with usage rates rising from the previous survey. In terms of the job category of users, the use of "office space made available by the company" was as much as 20% not only by respondents in the "sales" category, which generally requires workers to be out of the office, but also by those in "specialized technical work" and "administration / personnel / accounting / planning, etc.," which mainly involve desk work. This indicates the spread of the use of telework by a wide range of jobs in diverse places in addition to home. Furthermore, the substantial rise in teleworking at scheduled timings may be an indication that companies are supporting workers' telework.

The needs of workers also suggest the future direction of telework's expansion. Those with positive intentions toward telework amounted to 44.6% of total, largely exceeding the current teleworking ratio (8.1%). We also found that, as impediments to promoting telework, teleworkers felt dissatisfaction in the place for telework more strongly than non-teleworkers, such as "lack of/few places for telework apart from home (third place office)" and "own burden of costs for using office space by service providers."

This survey also showed that teleworkers had high satisfaction in their work environment. Furthermore, those with high satisfaction in their work environment replied that subjective conditions of the environment such as "can work comfortably," "improves productivity," "improves motivation," and "increases engagement in the organization" applied more than those with low satisfaction, which implies the possibility that the former actually worked with high motivations and with a strong engagement in the organization. If so, designing or providing a workplace environment that meets such conditions, or in other words affects the mentality of the workers, may lead to improved productivity of the organization.

Meanwhile, workers have also become more diversified. The conditions of places where diverse workers such as the young, women, seniors, and foreigners can work with high productivity and motivation are bound to be more diversified.

For example, workers with small children had high demand for telework and tended to require somewhere other than home. If participation of women and seniors in office work continues to increase, the need for such types of third place offices as suburban or childcare support-type may rise. Although the general image of a teleworker is young or has small children, it is workers in the management post that actually have a high teleworking ratio. The requirements of such middle-aged workers in workplaces must be different. On the other hand, as much as 41.5% of respondents did not intend to telework, which indicates that conventional offices as a place where workers gather to work may continue to be required.

To address these situations, we believe the need to provide a wide array of options of workplaces and workstyles will rise in the future. Providing an environment where workers can choose flexibly and freely from the options may become an important management strategy for organizations, also from the perspective of improving productivity and securing human resources. Xymax Real Estate Institute will

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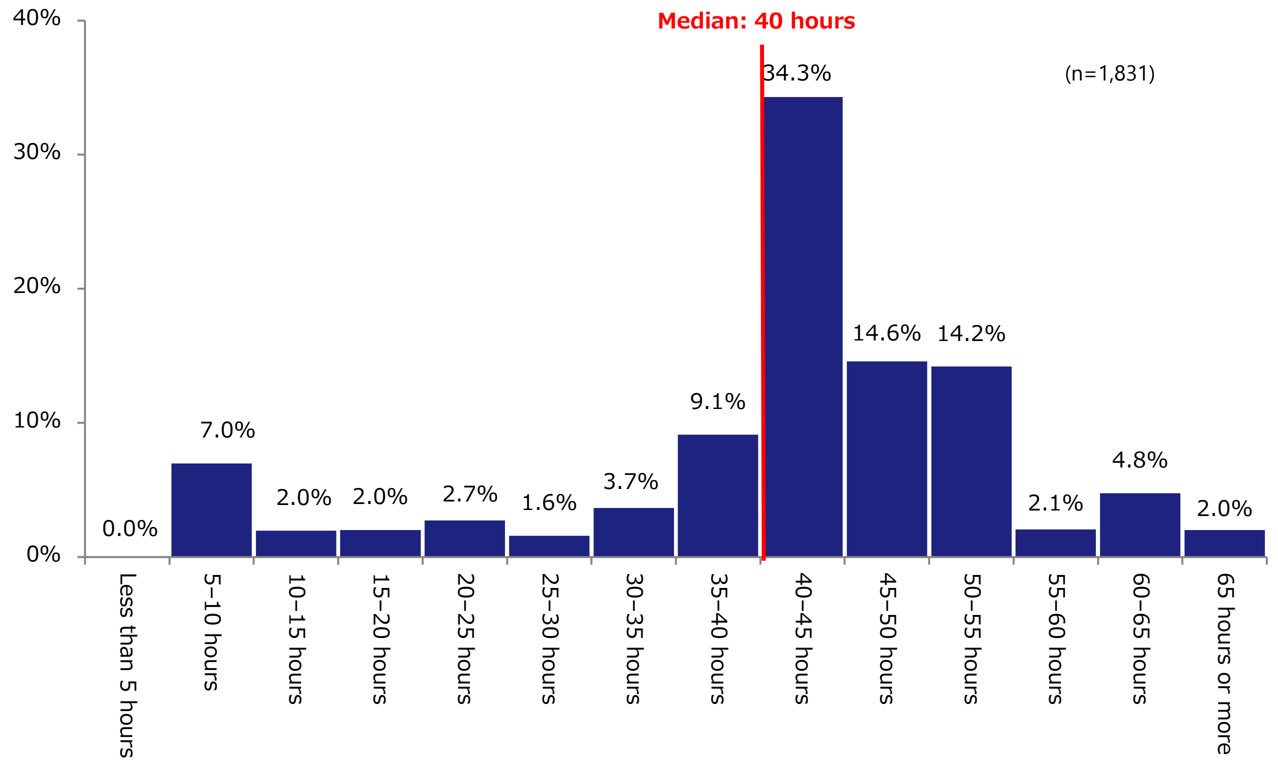
continue to capture changes in the workplace by conducting worker surveys as well as company surveys on a continuous basis.

5. (Reference) Actual workstyles of respondents

In this report we presented our survey results by focusing mainly on the teleworking. Lastly, for reference, we offer information that shows how the respondents to this questionnaire survey usually work.

We asked respondents their total working hours of an average week (including overtime, excluding recess time and commuting time). Those who worked 40–45 hours accounted for the most, at 34.3%. The median was 40 hours (**Figure 27**). The majority of respondents seem to be workers who work eight hours a day, five days a week. Those who worked for less than 40 hours accounted for 28.1%.

Figure 27: Total working hours of an average week



Asked about the current work environment, only 44.1% of respondents chose "basically working at fixed (own) desk" (**Figure 28**). This indicates that more than half of the respondents work at diverse places regardless of whether in or outside the office.

Other top replies included "there is an open meeting space within the office" (23.8%), "using video or web conferences" (20.9%), and "there is a place to refresh within the office" (20.5%). We also found that flexible use of time is spreading, as can be seen in "a flextime system has been applied" (19.3%) and "a shorter working hour system has been applied" (14.3%).

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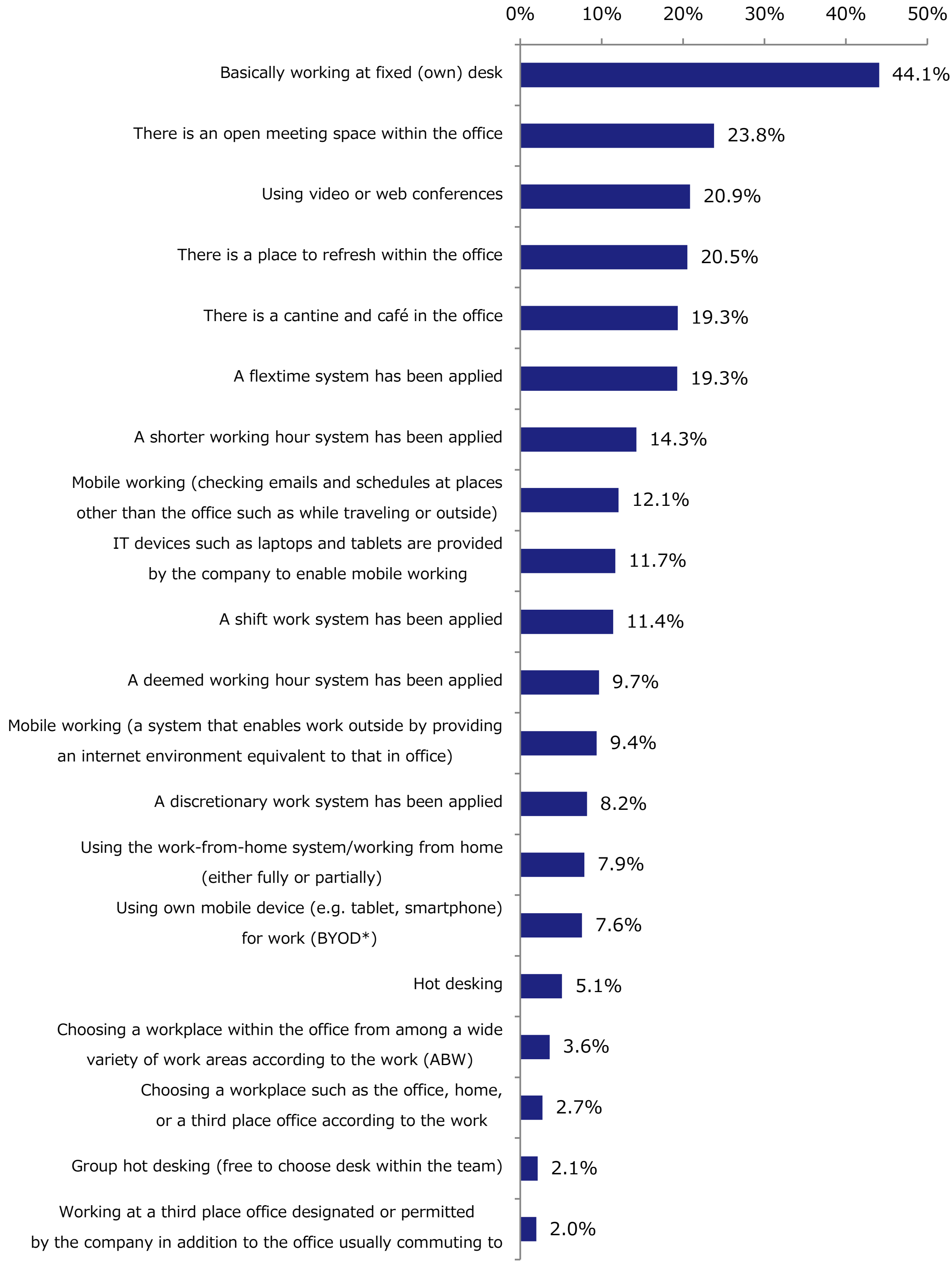
Figure 28: Current work environment



(Multiple answers; n=1,831)

*BYOD: Stands for "Bring Your Own Device." The policy of permitting employees to bring their own devices to their workplace, and to use those devices for their work.

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Of teleworkers' total working hours of an average week, the median of hours teleworked was six hours a week (**Figure 29**). In terms of the percentage of teleworked hours to the total working hours of a week, the top reply was less than 5%, with the median being just 16%. On the other hand, the result showed that 4.7% of teleworkers allocated more than 90% of their total working hours to telework (**Figure 30**).

Figure 29: The distribution of hours teleworked of an average week

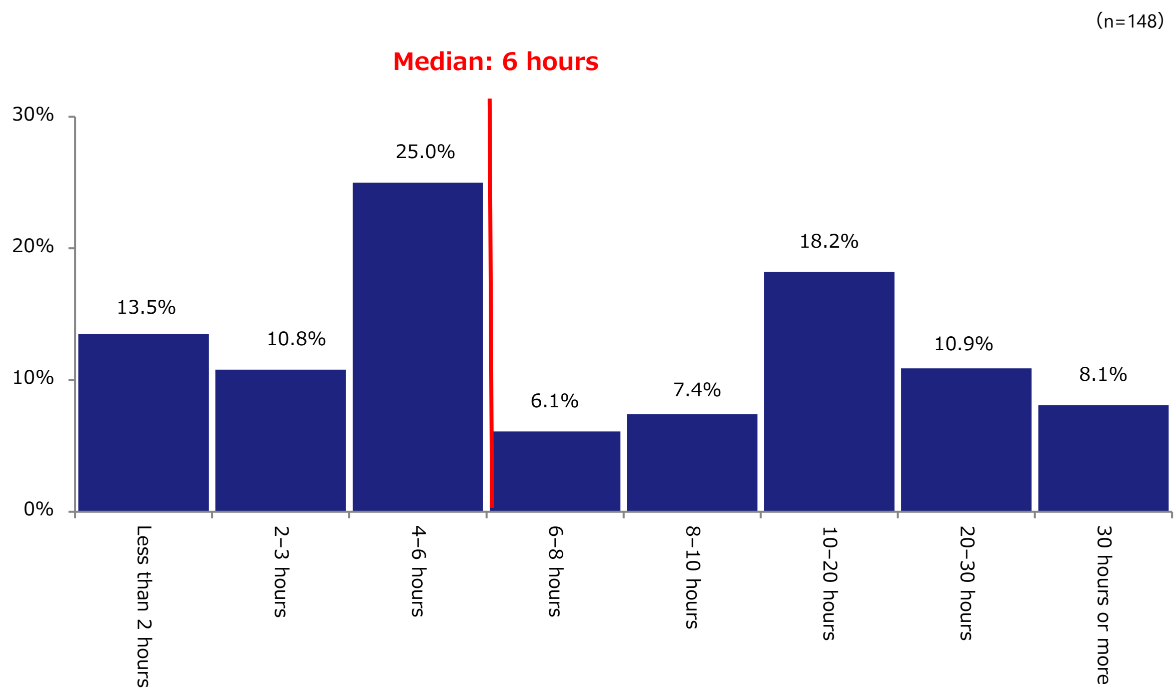
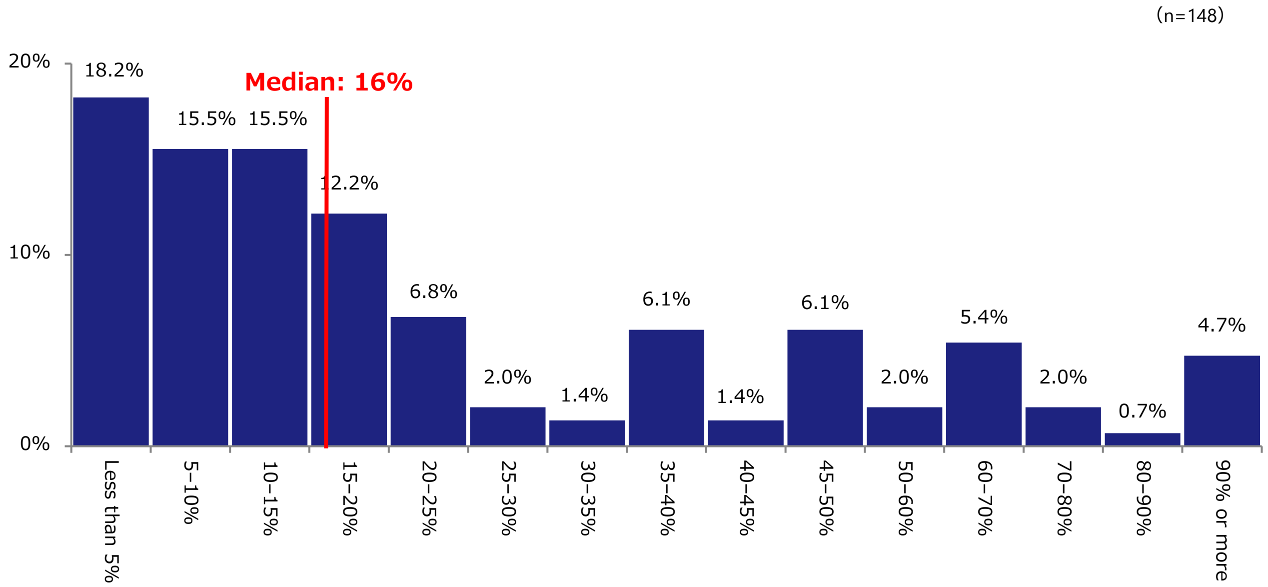


Figure 30: The distribution of the percentage of hours teleworked to the total working hours of a week



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Survey Overview

Survey period	February 2018	Targets of the survey	Screening: 40,000 male and female aged between 15 and 69 Main survey: 2,064 male and female aged between 20 and 69 who replied in the screening that their profession was officer of company or institution or self-employed (other than restaurant, retailer, interpersonal service provider) and main workplace (office) was in Greater Tokyo (Tokyo, Kanagawa, Saitama, Chiba). 1,831 provided valid responses.
Area	Greater Tokyo (Tokyo, Kanagawa, Saitama, Chiba prefectures)		
Method	Online survey		

Profile of Respondents

		%	n
Gender and age	Male aged 20–24	1.5%	28
	Male aged 25–29	7.2%	132
	Male aged 30–34	5.8%	106
	Male aged 35–39	7.4%	135
	Male aged 40–44	7.2%	132
	Male aged 45–49	9.7%	178
	Male aged 50–54	6.6%	120
	Male aged 55–59	6.1%	112
	Male aged 60 or above	9.1%	167
	(Male total)	60.6%	1110
	Female aged 20–24	1.4%	26
	Female aged 25–29	7.6%	139
	Female aged 30–34	4.9%	90
	Female aged 35–39	4.1%	75
	Female aged 40–44	5.0%	92
	Female aged 45–49	4.8%	88
	Female aged 50–54	4.4%	81
	Female aged 55–59	2.6%	47
	Female aged 60 or above	4.5%	83
	(Female total)	39.4%	721
Profession	Administration / Personnel / Accounting / Planning, etc.	20.0%	366
	General clerical work / Receptionist / Secretary	27.6%	506
	Sales	17.3%	317
	Customer service	3.2%	58
	Specialized office work such as research/analysis and patent/law	2.1%	38
	Specialized technical work such as R&D, design, and system	16.3%	298
	Specialized creative work such as editing, designing, and writing	3.5%	65
	Specialized medical and education-related work	1.5%	28
	Site management/supervision	2.1%	39
	Other	6.3%	116
Child status	Has child(ren) in lower grades of	16.8%	307
	Has child(ren) only in higher grades of elementary school or older	23.8%	436
	No child	58.8%	1077
	Unknown	0.6%	11

		%	n
Industry	Agriculture / Forestry	0.1%	2
	Fishery	0.0%	0
	Mining / Quarry / Gravel extraction	0.0%	0
	Construction	5.0%	91
	Manufactring	14.8%	271
	Electricity,	1.2%	22
	Information & communications	10.4%	191
	Transportation / Postal service	4.5%	83
	Wholesale / Retail	9.9%	182
	Financial / Insurance	9.6%	176
	Real estate / Leasing of goods	3.5%	65
	Academic research / Professional or technical service	3.0%	55
	Accommodation / Food & beverage service	0.4%	7
	Daily life services / Entertainment	1.4%	25
	Education / Learning support	2.3%	42
	Medical / Welfare	2.1%	39
	Multi-service business	0.7%	13
	Service (those not classified to other sectors)	17.6%	322
	Civil service (except for those classified to other sectors)	5.7%	104
	Other / Unclassifiable	7.7%	141
Form of employment	Officer of a company or institution	6.1%	112
	Company employee or staff of institution (management post)	15.5%	283
	Company employee or staff of institution (regular employee or staff other than in management post)	53.8%	985
	Company employee or staff of institution (non-regular employee or staff such as part-time/temporary staff)	21.4%	392
	Self-employed (restaurant, retailer, interpersonal service provider)	0.0%	0
	Self-employed (other than restaurant, retailer, interpersonal service provider)	3.2%	59
	Other / Unemployed (incl. job seekers, students, stay-at-home wife/husband)	0.0%	0

The percentage mix in the charts contained in this report are rounded to the second decimal place and therefore may not add up to 100%.

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