

# Greater Tokyo Office Worker Survey 2019

Capturing changes in workers' workstyles and values

December 19, 2019

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. We have conducted seven questionnaire surveys of companies since autumn 2016 and three surveys of office workers since the end of 2016, this being the fourth. This periodic report summarizes the latest trend of the actual workstyles and values of workers working in Greater Tokyo, based on the results of the survey.

Related surveys:

- *New Ways of Working and New Types of Office*, released on April 13, 2017  
<https://www.xymax.co.jp/english/research/images/pdf/20170413.pdf>
- *Greater Tokyo Office Worker Survey 2018*, released on June 6, 2018  
<https://www.xymax.co.jp/english/research/images/pdf/20180606.pdf>
- *Effect of Commuting Stress on the Working People's Satisfaction*, released on June 4, 2019  
<https://www.xymax.co.jp/english/research/images/pdf/20190604.pdf>

## Summary of Survey Results

### 1. Reality and issues of workstyle measures

- More than **60%** of the workers replied that their employer was carrying out workstyle reforms. However, a majority of them replied that there were **no changes in their workstyle**.
- Nearly half of the workers whose employer carried out workstyle reforms felt the effect of the reforms. The top effects were "**rectified long work hours (overtime, extra days)**" (**39.8%**) and "**better work-life balance**" (**38.3%**).
- 71.7% of the workers were dissatisfied in their workstyle or workplace in some way.
- Dissatisfaction in the environment of their office included "difficult to refresh oneself" (48.9%) and "performance of air conditioning (e.g. temperature, humidity)" (45.7%).
- The teleworking rate was **39.5%**.
- When breaking down telework-related measures into "mobile work" and "place for telework,"<sup>\*1</sup> the use of mobile work was 36.1% while the **use of a place for telework remained at 13.4%**.
- Even when including measures other than telework, the use of **mobile work** was high.
- **73.7% of the workers using a place for telework felt an effect of workstyle reforms**, 30.5 percentage points more than workers who did not use a place for telework.
- By attribute of workers, telework has spread among workers in a management post and in job categories of "corporate planning," "planning, development, marketing of products & services," and "sales." The **teleworking rate rose as the number of employees of the company/organization increased**.
- Many of the users of a place for telework used it for **1–2 times or less per month**, indicating that there is room for growth in the spread of telework. There were characteristic benefits in serviced and shared offices, such as "**ability to come up with good ideas**" and "**better work results**."
- Reasons for difficulty in teleworking in the environment of home included "difficult to switch on and

off from work" (49.6%) and "do not have desk or chair suited for work" (49.6%).

## 2. Needs for workstyles

- The needs for telework was higher than the current introduction (teleworking) rate, especially in "place for telework," which was **21.7 points** larger than the current usage rate.
- The needs exceeded the usage rate in workstyle-related measures, especially in "**flextime program**," "**work-from-home program**," and "**side job**."
- **There was a large gap between the telework usage rate and needs among female workers with a preschool child.** (From **PICK UP** column)
- Workers are more interested in "**working in an area near home to achieve proximity between workplace and home**" (75.9%) than "working in the city center where people and functions are concentrated" (58.9%).

## 3. Satisfaction, well-being

- Only one in two workers were satisfied with their current workstyle or thought their workstyle or work environment was good for their physical and mental well-being.
- When comparing workers who used a place for telework and those who did not, there was a large gap in their satisfaction in their workstyle and their evaluation of their well-being.

## 4. Future workstyles

- The top replies of workers' ideal future society or workstyle were, "commuter trains are less congested, enabling workers to make the most of the commute time" (85.3%), "total work hours are shorter, enabling workers to spend more time other than in work" (84.1%), "there are more places where one can work near the home, resulting in less commuting stress (83.7%), and "it is easier to balance child/elder care and work" (83.6%), which indicate workers' **interest in reducing commuting stress and improving work-life balance.**

\*1 Refers to "work-from-home program," "use of serviced office or shared office provided by a specialized operator," and "use of satellite office or other similar facility owned or rented by own company."

# 1. Reality and issues of workstyles

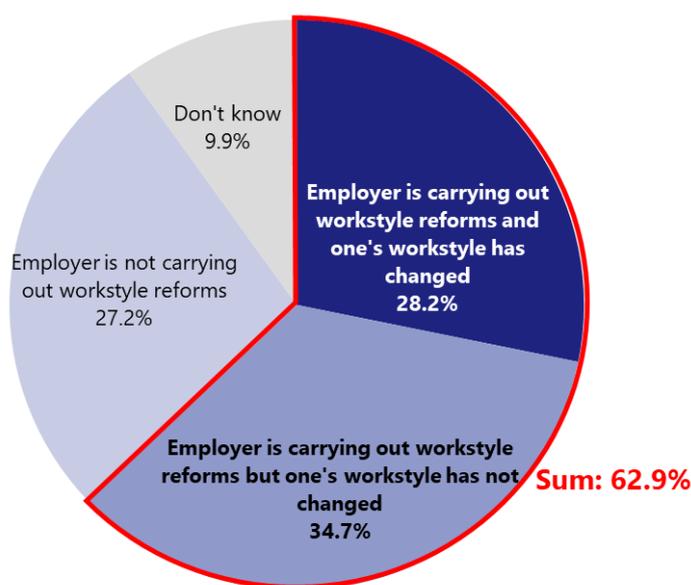
## 1-1. Reality and issues of workstyle reforms

- ✓ More than 60% of the workers replied that their employer was carrying out workstyle reforms. However, a majority of them replied that there were no changes in their workstyle.
- ✓ Nearly half of the workers whose employer carried out workstyle reforms felt the effect of the reforms. The top effects were “rectified long work hours (overtime, extra days)” (39.8%) and “better work-life balance” (38.3%).
- ✓ 71.7% of the workers were dissatisfied in their workstyle or workplace in some way.
- ✓ Dissatisfaction in the environment of their office included “difficult to refresh oneself” (48.9%) and “performance of air conditioning (e.g. temperature, humidity)” (45.7%).

In this survey, we obtained valid responses from 2,060 men and women aged between 20 and 69, whose profession was officer or staff of a company or organization, whose job category was managerial, specialized or technical, clerical or sales, and whose regular workplace was in Greater Tokyo (Tokyo, Kanagawa, Saitama, and Chiba prefectures). We will look into the reality of the respondents’ current workstyles.

We first asked the workers’ and their employers’ initiatives in workstyle reforms. Workers who replied that their employer was carrying out workstyle reforms accounted for more than 60% of total (62.9%) (**Figure 1**). However, 34.7% replied that their workstyle had not changed, which is more than half of the workers who replied that their employer was carrying out workstyle reforms. Such workers may not be able to consider workstyle reforms as something that concern them.

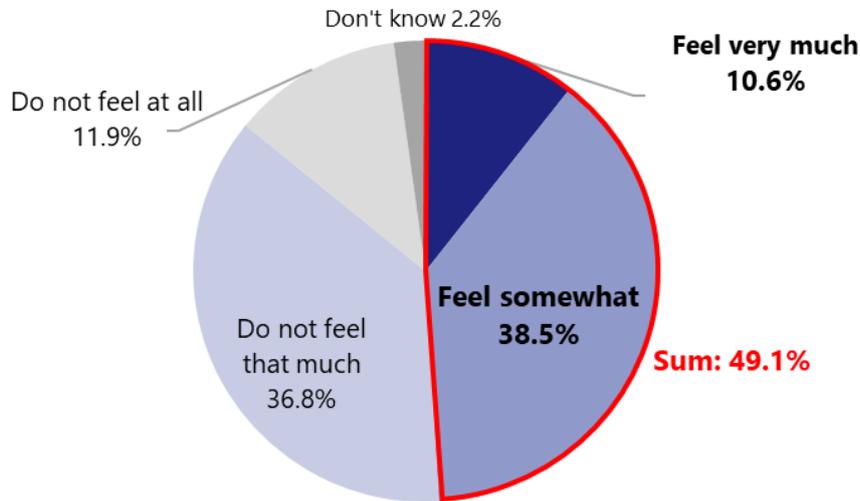
**Figure 1: Initiatives in Workstyle Reforms**



(Replies of all respondents (n=2,060))

We then asked workers whose employers were carrying out workstyle reforms whether they felt the effect of the reforms. 49.1% of the workers replied that they felt an effect “very much” or “somewhat” (Figure 2).

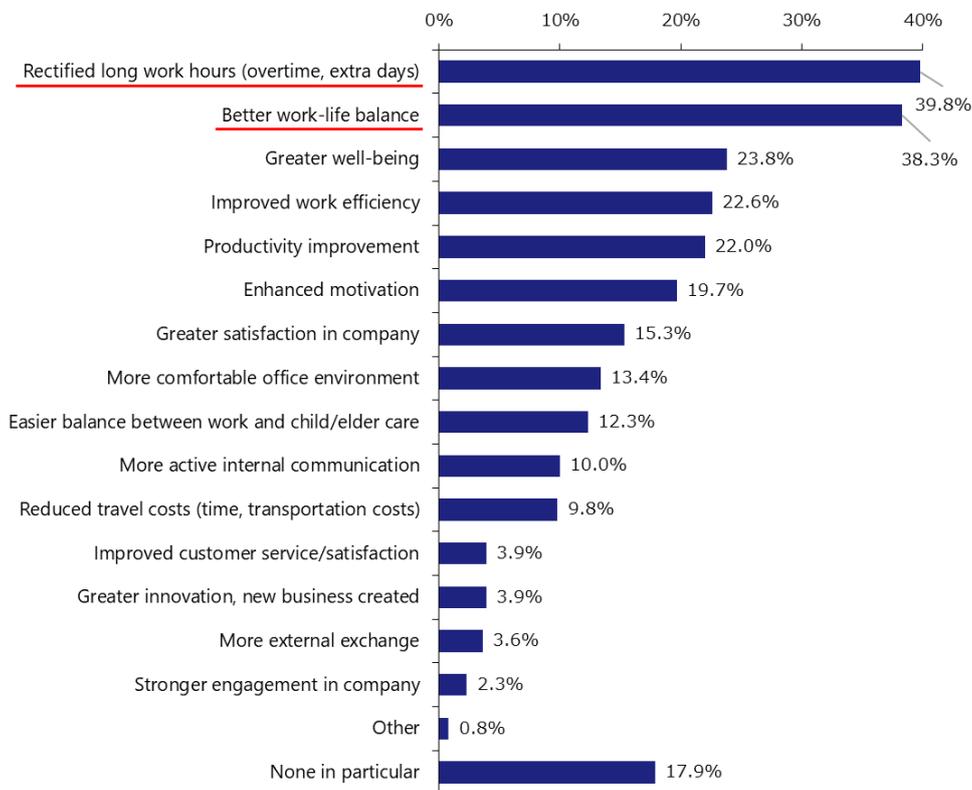
**Figure 2: Whether Workers Felt the Effect of Workstyle Reforms**



(Replies of workers whose employer carried out workstyle reforms (n=1,295))

As for the specific effects of workstyle reforms, the top replies were “rectified long work hours (overtime, extra days)” (39.8%) and “better work-life balance” (38.3%) (Figure 3). The results show that workers felt a wide variety of effects.

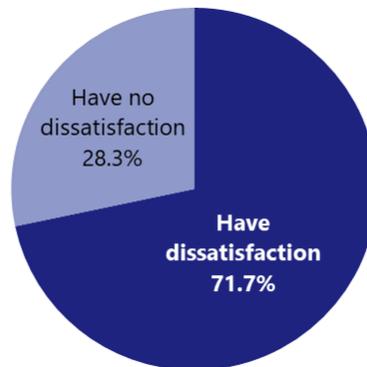
**Figure 3: Specific Effects of Workstyle Reforms**



(Replies of workers whose employer carried out workstyle reforms (n=1,295); multiple answers)

We will now look into workers' dissatisfactions in their current workstyle. Those who were dissatisfied in some way with the workstyle or work location with their current employer accounted for as much as 71.7% (Figure 4).

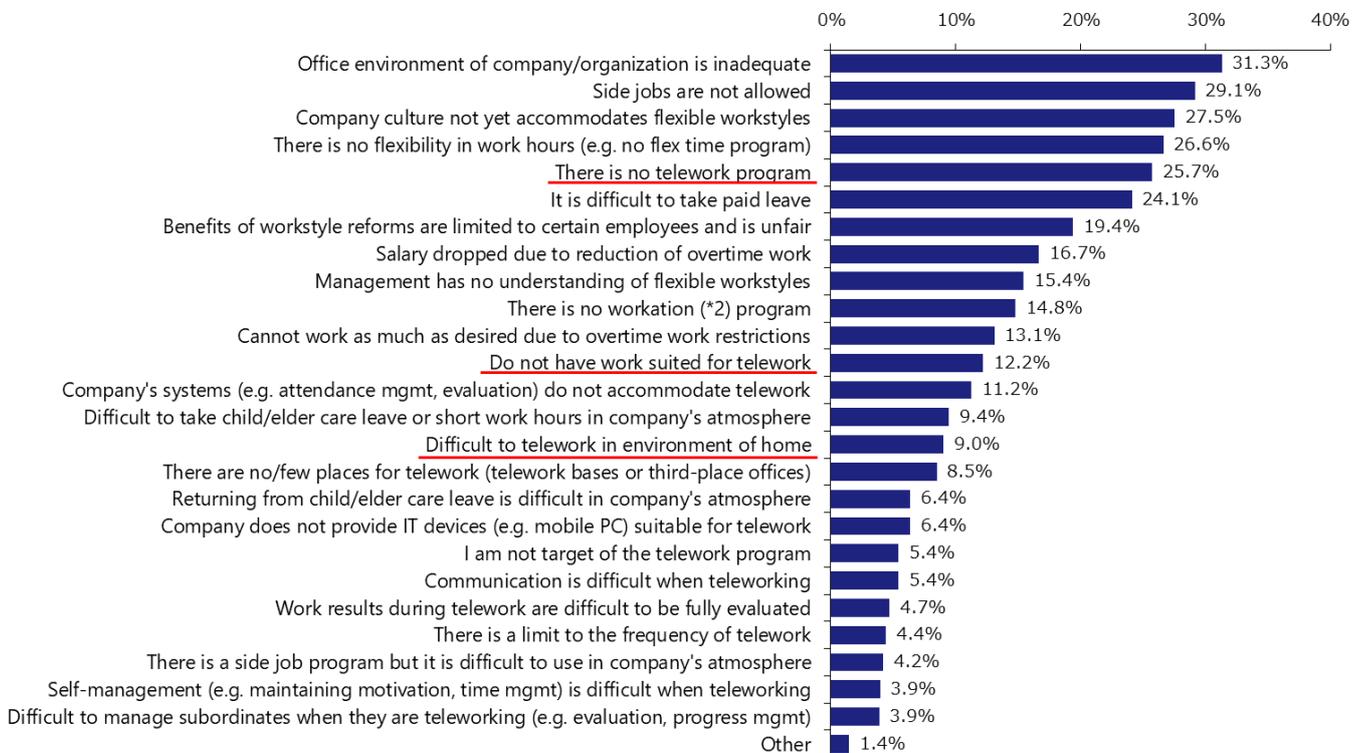
**Figure 4: Dissatisfaction in Workstyle or Work Environment**



(Replies of all respondents (n=2,060))

Figure 5 shows the specific dissatisfactions of those who replied in Figure 4 that they had some kind of dissatisfaction. The dissatisfactions were various, such as in the work location and program. For telework, in particular, some workers were dissatisfied that "there is no telework program" (25.7%), while others seemed to be unable to fully utilize the program, even if it existed, for reasons such as "do not have work suited for telework" (12.2%) and "difficult to telework in environment of home" (9.0%).

**Figure 5: Specific Dissatisfaction in Workstyle or Work Environment**

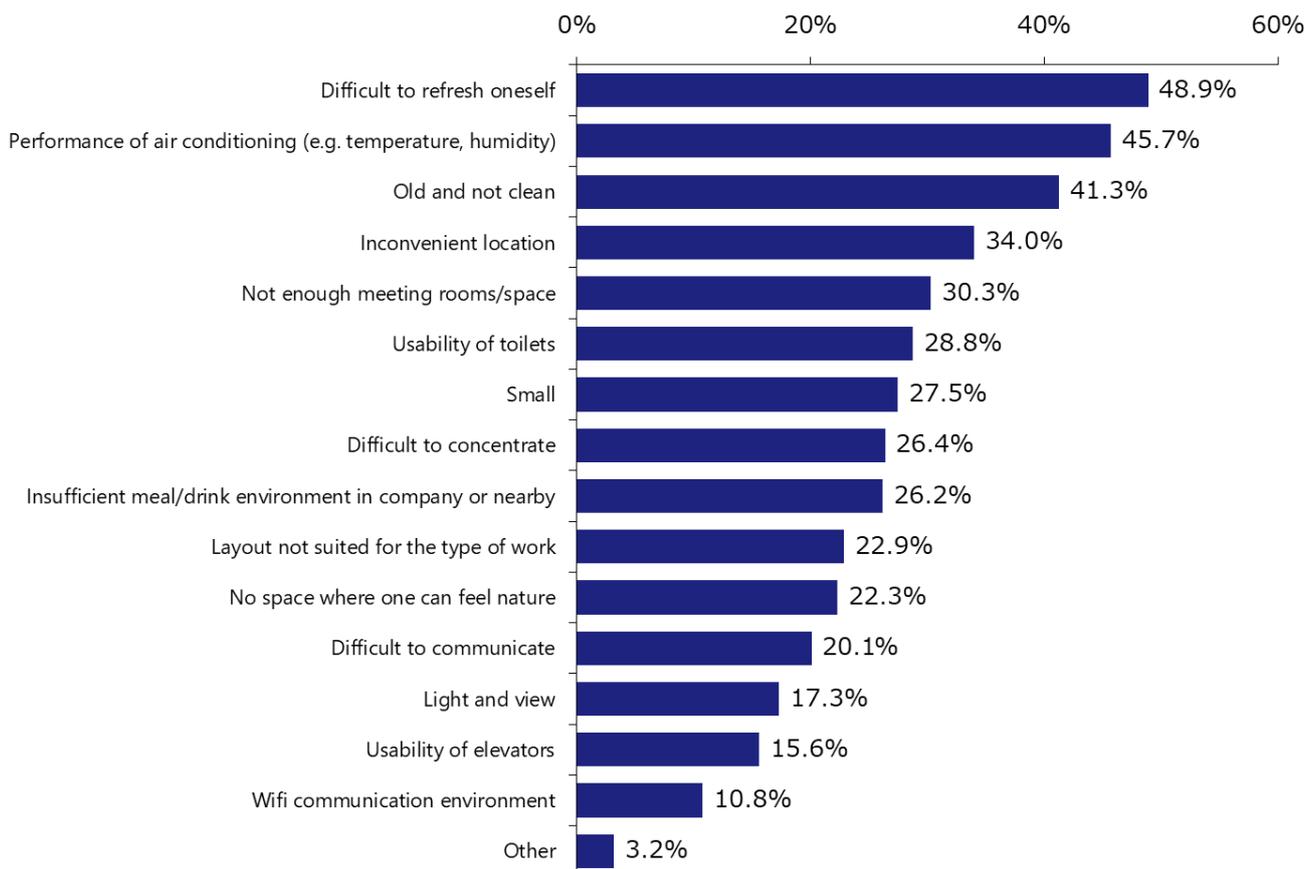


(Replies of workers who replied they had a dissatisfaction in Figure 4 (n=1,477); multiple answers)

\*2 Workation: A portmanteau of working vacation, meaning to work from a travel destination, etc.

Furthermore, we asked those who chose “office environment of company/organization is inadequate,” the top reply in **Figure 5**, the reason for choosing the reply. The most popular reasons were “difficult to refresh oneself” (48.9%), “performance of air conditioning (e.g. temperature, humidity)” (45.7%), and “old and not clean” (41.3%), all of which were more than 40% (**Figure 6**). There was a wide variety of dissatisfactions in their office. The office environment is extremely important as it can affect workers’ motivation and productivity. Companies must recognize the issues of their offices and provide a good environment for workers.

**Figure 6: Dissatisfaction in the Office Environment**



(Replies of workers who replied "office environment of company/organization is inadequate" (n=462); multiple answers)

1-2. Teleworking rate and issues of telework

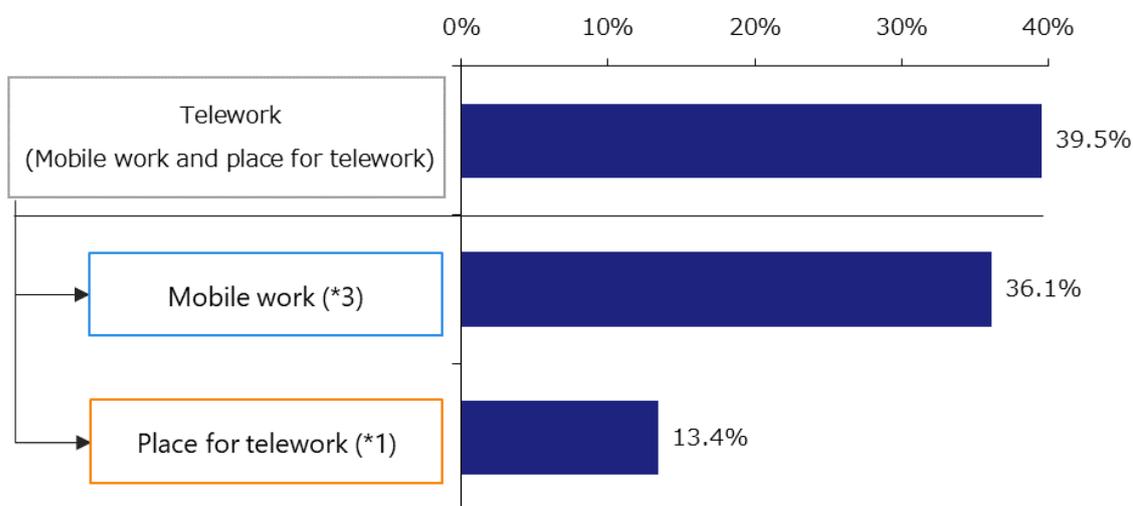
- ✓ The teleworking rate was 39.5%.
- ✓ When breaking down telework-related measures into “mobile work” and “place for telework,” the use of mobile work was 36.1% while the use of a place for telework remained at 13.4%.
- ✓ Even when including measures other than telework, the use of mobile work was high.
- ✓ 73.7% of the workers using a place for telework felt an effect of workstyle reforms, 30.5 percentage points more than workers who did not use a place for telework.

In this section, we will take a deeper look into telework, one of the workers’ workstyles.

In this survey we asked workers about the workstyle measure they currently used and calculated the usage rate of each measure (Figure 8). Of the measures, we extracted three mobile work measures<sup>\*3</sup> and three measures related to places for telework.<sup>\*1</sup> In this report, we refer to workers who use any of these six measures as “teleworkers” and calculated the teleworking rate. It was 39.5% (Figure 7 (top row)).

Furthermore, we examined the usage rates of “mobile work” and “place for telework” (Figure 7 (lower two bars)). The usage rate of mobile work was 36.1%, which overlapped with a majority of teleworkers. On the other hand, only 13.4% of the workers used a place for telework, which indicates that there are quite a few workers who carry out telework but only in mobile work.

**Figure 7: Usage Rate of Workstyle-related Measure (Calculation for Telework Measures)**



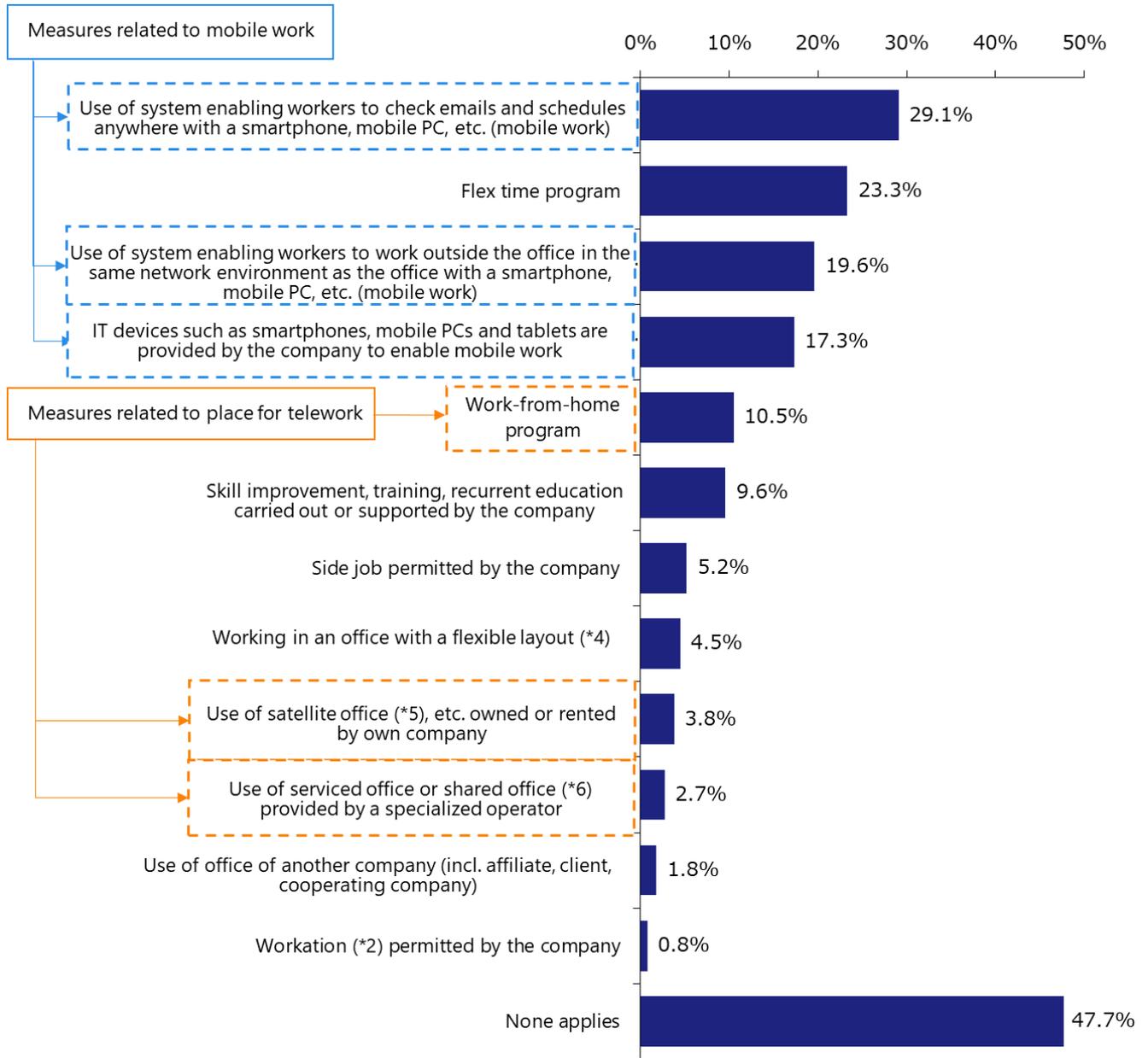
(Replies of all respondents (n=2,060); excerpt from Figure 8 and re-calculated)

\*1 Refers to “work-from-home program,” “use of serviced office or shared office provided by a specialized operator,” and “use of satellite office or other similar facility owned or rented by own company.”

\*3 Refers to “use of system enabling workers to check emails and schedules anywhere with a smartphone, mobile PC, etc. (mobile work),” “use of system enabling workers to work outside the office in the same network environment as the office with a smartphone, mobile PC, etc. (mobile work),” and “IT devices such as smartphones, mobile PCs and tablets are provided by the company to enable mobile work.”

Even when comparing the usage rate including measures other than telework, mobile work measures rank high, which suggests that mobile work is a relatively easy workstyle measure to carry out (Figure 8). The measure other than telework with the highest usage rate was "flextime program" (23.3%).

**Figure 8: Usage Rate of Workstyle-related Measures (Detail)**

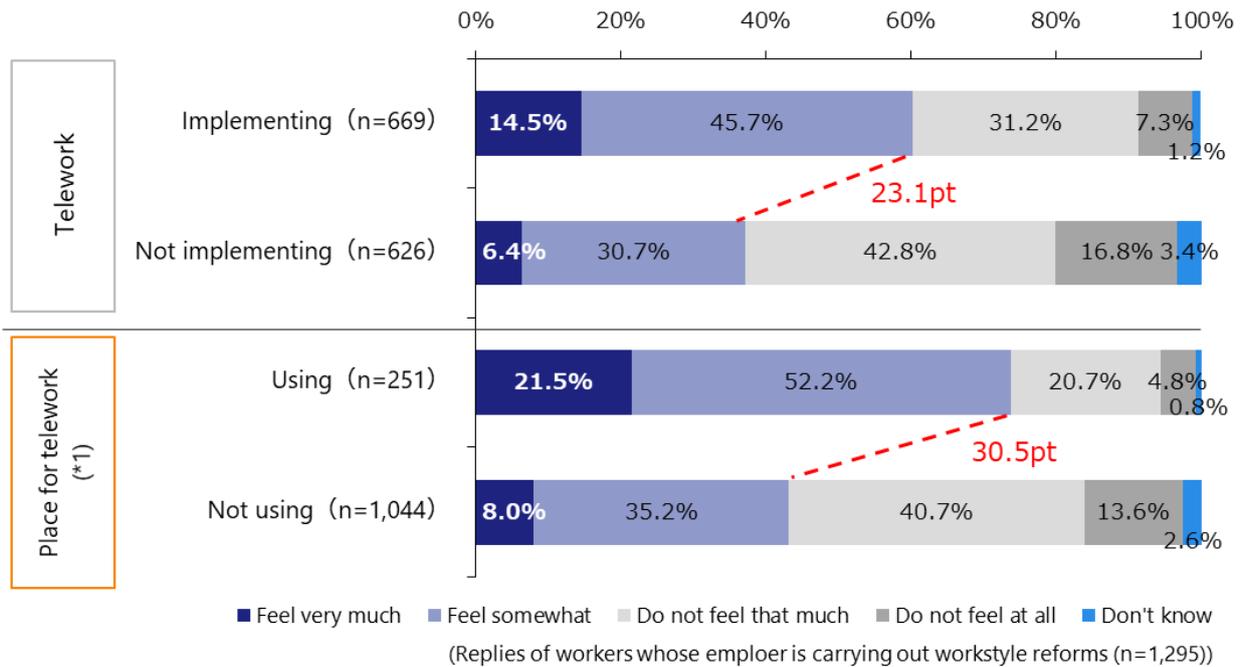


(Replies of all respondents (n=2,060); multiple answers)

- \*2 Workation: A portmanteau of working vacation, meaning to work from a travel destination, etc.
- \*4 Flexible layout: Hot desks, group hot desks, open meeting space, space for refreshing, ABW, canteen, café space, etc.
- \*5 Satellite office: An office located near a major railway station or the suburbs for the benefit of employees' commuting time, equipped with facilities similar to those of the main office.
- \*6 Regardless of contract terms such as shared use with another company or dedicated section for own company.

Looking at whether workers felt an effect of workstyle reforms, which we showed in **Figure 2**, by the teleworking status, teleworkers felt an effect (sum of “very much” and “somewhat”) 23.1 percentage points more than non-teleworkers (**Figure 9 (upper two bars)**). When focusing on measures related to places for telework and comparing by usage status, the difference in the percentage of workers feeling an effect increased to 30.5 points, with 73.7% of workers who used a place for telework feeling an effect of the reforms (**Figure 9 (lower two bars)**). Of the various workstyle reform measures, measures that provide workers with options for work location tend to result in workers feeling an effect of the reforms.

**Figure 9: Whether Workers Felt the Effect of Workstyle Reforms (By Telework Status)**



\*1 Refers to “work-from-home program,” “use of serviced office or shared office provided by a specialized operator,” and “use of satellite office or other similar facility owned or rented by own company.”

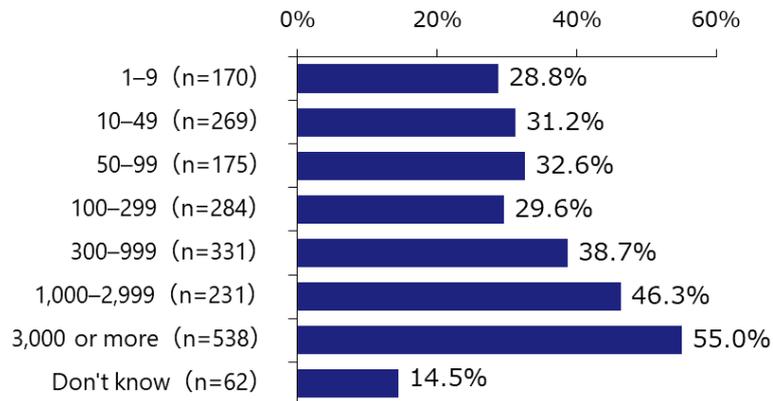
1-3. Reality of teleworkers

- ✓ By attribute of workers, telework has spread among workers in a management post and in job categories of “corporate planning,” “planning, development, marketing of products & services,” and “sales.” The teleworking rate rose as the number of employees of the company/organization increased.
- ✓ Many of the users of a place for telework used it for 1–2 times or less per month, indicating that there is room for growth in the spread of telework. There were characteristic benefits in serviced and shared offices, such as “ability to come up with good ideas” and “better work results.”
- ✓ Reasons for difficulty in teleworking in the environment of home included “difficult to switch on and off from work” (49.6%) and “do not have desk or chair suited for work” (49.6%).

Thus far, we have found that telework has gradually spread in society, despite a difference in the way “mobile work” and “place for telework” have spread, and that it has a positive impact on whether workers feel the effect of workstyle reforms. In this section, we look into the reality of teleworkers: to whom and to what degree telework is currently being adopted.

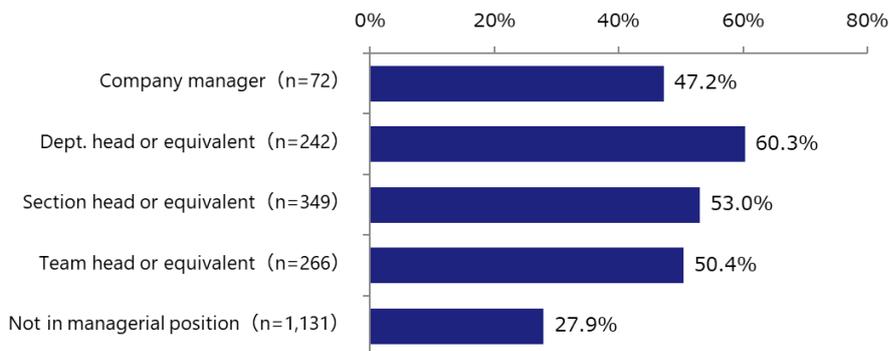
We will first look at teleworkers by attribute. Workers’ teleworking rate by the number of employees of the company/organization rose as the number of employees increased (Figure 10).

**Figure 10: Teleworking Rate (By Number of Employees of Company/Organization)**



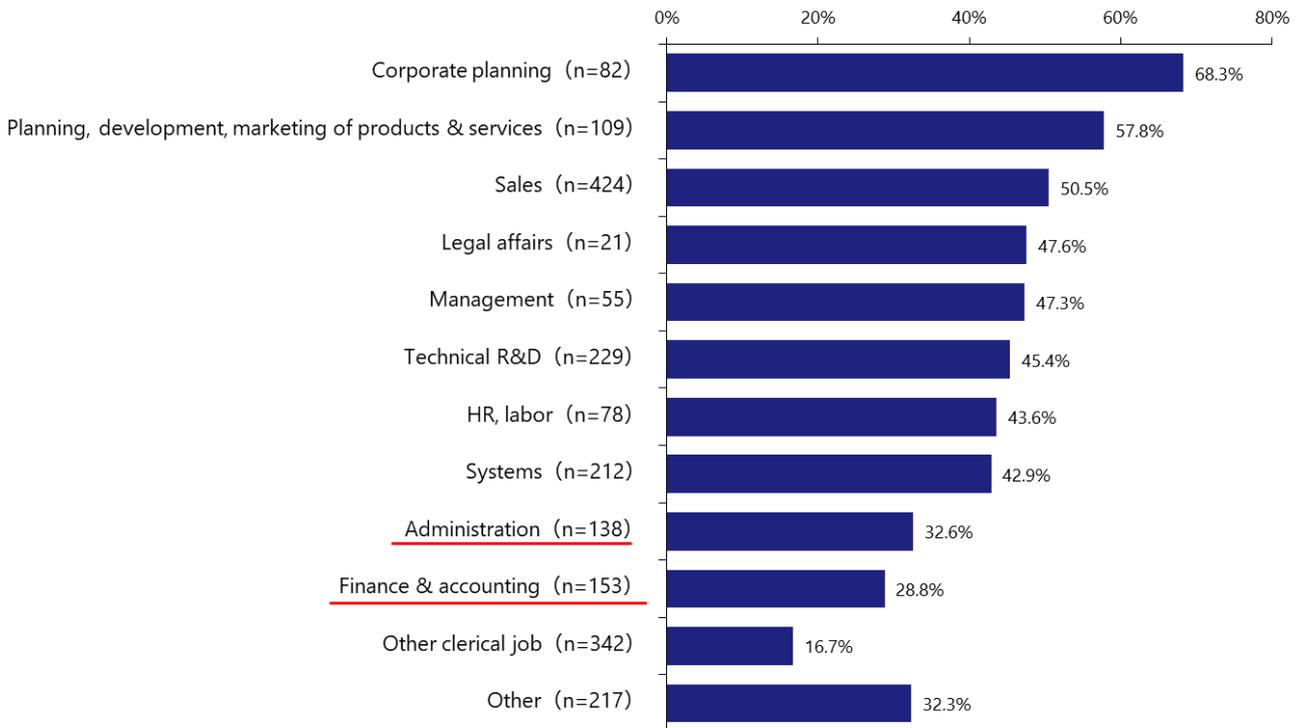
By managerial position, the teleworking rate was relatively higher among workers in a managerial position: 60.3% of workers in a position equivalent to department head teleworked (Figure 11). On the other hand, the teleworking rate was the lowest among workers who were not in a managerial position (27.9%).

**Figure 11: Teleworking Rate (By Managerial Position)**



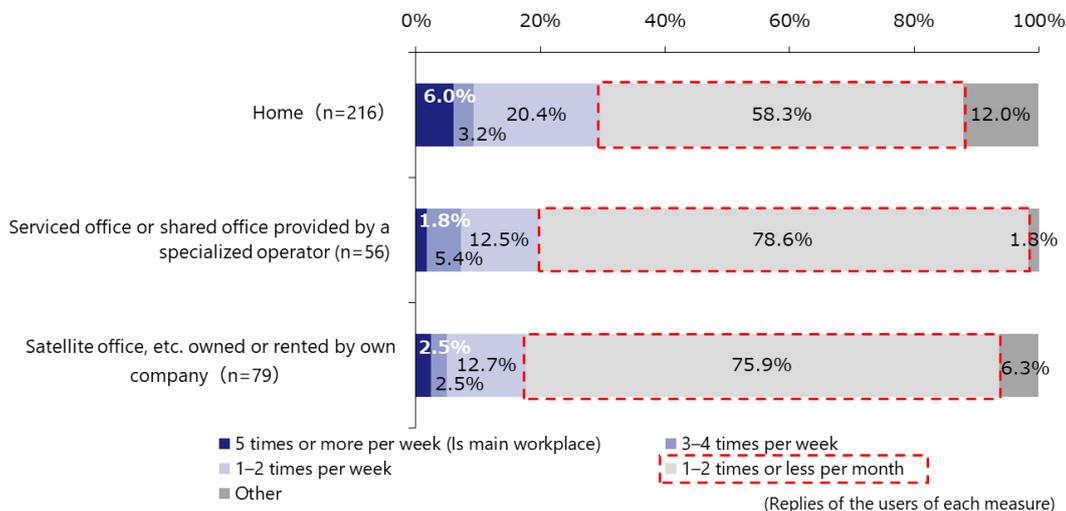
Finally, **Figure 12** shows the results by job category. The teleworking rate exceeded 50% in job categories of “corporate planning” (68.3%), “planning, development, marketing of products & services” (57.8%), and “sales” (50.5%). Although the rate was lower than other job categories in “administration” and “finance & accounting,” which are considered to consist mainly of desk work, around 30% of workers in these job categories teleworked.

**Figure 12: Teleworking Rate (By Job Category)**



We then asked how frequent users of the three measures related to places for telework used the place. In all measures, workers who replied that they used the place 1–2 times or less per month accounted for the most (**Figure 13**). Even among workers who already used a place for telework, there still seems to be room for the spread of telework when we look at the frequency of use. Workers who used the place 1–2 times or more per week accounted for around 30% among users of the work-from-home program and around 20% among users of serviced or shared offices and satellite offices.

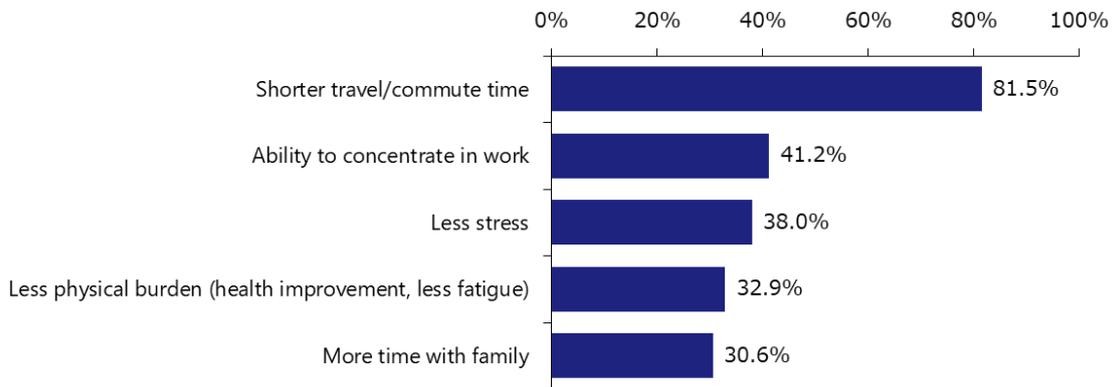
**Figure 13: Frequency of Use (By Place for Telework)**



When we asked users of each place for telework about the benefits of using the place, the top two benefits for all three places for telework were “shorter travel/commute time” and “ability to concentrate in work” (Figures 14–16). These two can be considered as the benefits of working in a place other than the office, regardless of the specific place.

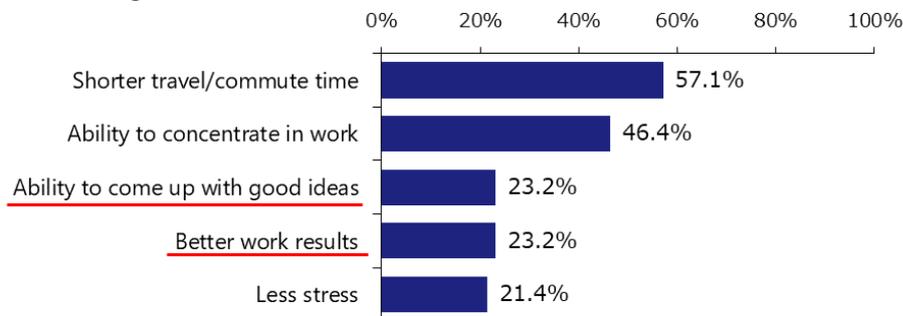
In serviced or shared offices, the top two benefits were followed by “ability to come up with good ideas” (23.2%) and “better work results” (23.2%). These benefits did not rank high in the benefits of other places for telework (working from home: 10.6% for “ability to come up with good ideas,” 14.8% for “better work results;” satellite offices: 5.1% and 15.2%, respectively) and are thought to be benefits characteristic of serviced or shared offices.

**Figure 14: Benefits of Working from Home**



(Replies of users of work-from-home program (n=216); multiple answers; excerpt of top replies)

**Figure 15: Benefits of Serviced or Shared Offices**



(Replies of users of serviced or shared offices (n=56); multiple answers; excerpt of top replies)

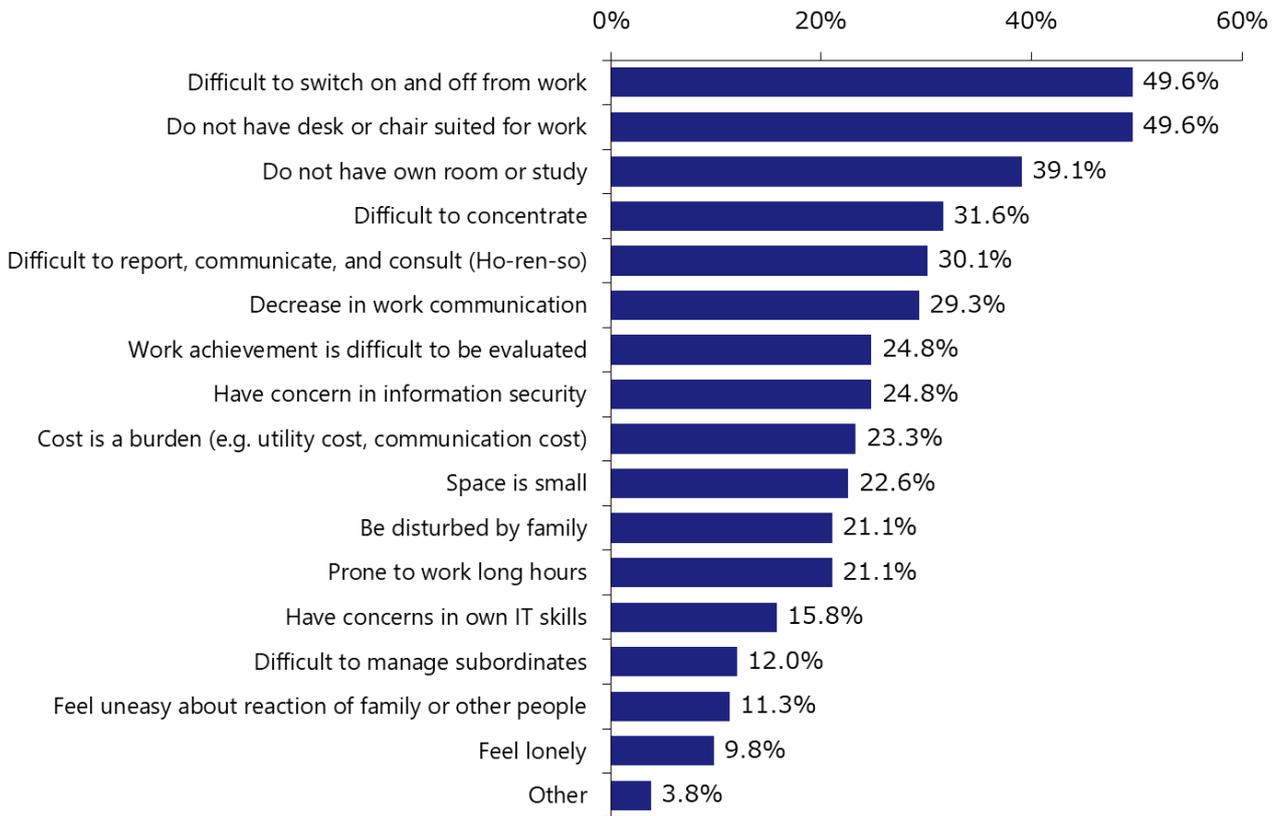
**Figure 16: Benefits of Satellite Offices**



(Replies of users of satellite offices (n=79); multiple answers; excerpt of top replies)

We also asked those who chose “difficult to telework in environment of home” in **Figure 5** (Specific Dissatisfaction in Workstyle or Work Environment) the reason for choosing the item. The top reasons included “difficult to switch on and off from work” (49.6%), “do not have desk or chair suited for work” (49.6%), and “do not have own room or study” (39.1%) (**Figure 17**). Although we indicated the benefits of working from home in **Figure 14**, home is a place to live and may lack the appropriate facilities to be used as a place to work.

**Figure 17: Dissatisfaction in Working from Home**



(Replies of workers replying “difficult to telework in environment of home” (n=133); multiple answers)

In view of the above, it would be important for companies not to simply promote telework but to fully understand the benefits and disadvantages of their offices and various telework measures and provide their employees with workplace options so as to facilitate their work.

**PICK UP**

**Importance of having options for workplaces**

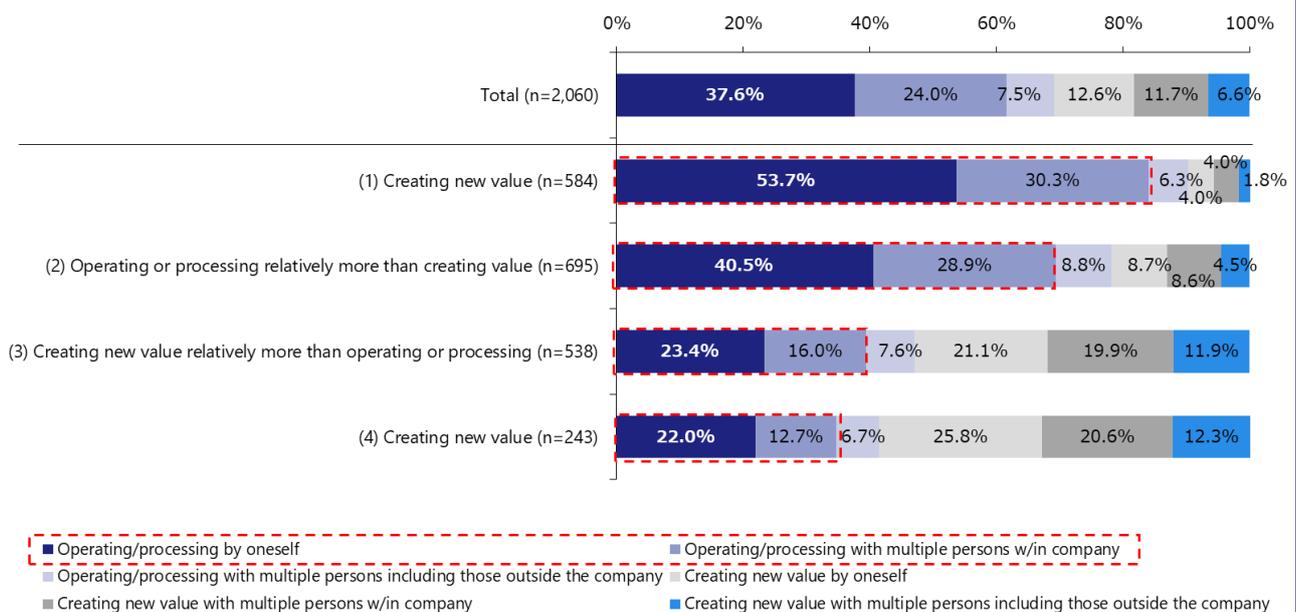
Here we examine the importance of having a wide variety of options for workplaces, from the perspective of workers' nature of work and work type.

We first classified the workers into four groups (from (1) to (4)) based on the nature of their work by asking them on a 4-point scale whether their work was "creating new value" or "operating or processing." We then classified their work into six types based on "with whom (by oneself; multiple persons within the company; multiple persons including those outside the company)" and "what kind (create new value; operate or process)," and asked the respondents how much percentage of time they spent on each type of work. **Figure 18** is the result for each of the four groups of the nature of work.

When we look at the percentage (time) of work types for the "(1) Operating or processing" and "(2) Operating or processing relatively more than creating value" groups, which account for more than 60% of all respondents, the percentage of "operating or processing by oneself" accounted for the most in both groups, as much as a majority (53.7%) in the "(1) Operating or processing" group, in particular. This was followed by "operating or processing with multiple persons within the company." These two work types accounted for more than 80% in total in the "(1) Operating or processing" group. Furthermore, since "operating or processing by oneself" and "operating or processing with multiple persons within the company" each accounted for more than 30% in the "(4) Creating new value" and "(3) Creating new value relatively more than operating or processing" groups, having a place where one person or multiple persons within the company can concentrate in their work will be especially important for workers of any type.

The above results also indicate that there was no work type that was not carried out at all by any of the groups from (1) to (4) and that all workers were engaged in various types of work. For example, as it is difficult to carry out work by multiple persons in a work-from-home program, it would be important for companies to provide a diverse range of workplace options to accommodate various work types, from the perspective of improving workers' productivity.

**Figure 18: Percentage (Time) of Each Work Type (By Nature of Work (Value Creation or Operation/Processing))**



## 2. Needs for Workstyles

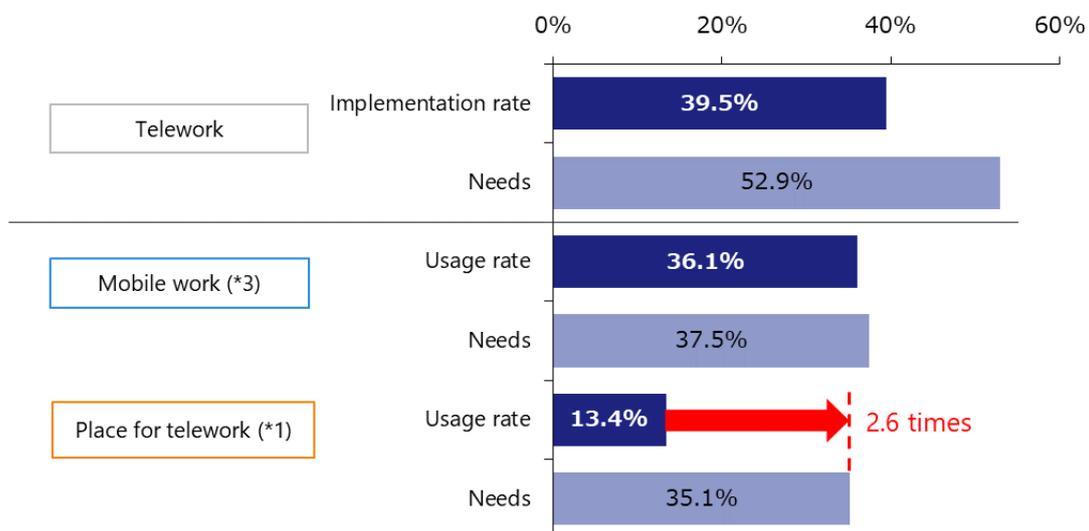
### 2-1. Usage rate and needs for workstyle-related measures

- ✓ The needs for telework was higher than the current introduction (teleworking) rate, especially in "place for telework," which was 21.7 points higher than the current usage rate.
- ✓ The needs exceeded the usage rate in workstyle-related measures, especially in "flextime program," "work-from-home program," and "side job."
- ✓ There was a large gap between the telework usage rate and needs among female workers with a preschool child. (From "PICK UP" column)

In the previous chapter, we made analyses based on workers' current workstyles. In this chapter, we will look into the needs for various workstyles, in addition to the current workstyles.

We first compared the usage rate and needs for different workstyle-related measures by asking which measure the respondents wanted to use, regardless of their current work or situation (Figure 20). Figure 19 extracted measures related to telework, as in Figure 7. The results indicate that the needs for telework was larger than the usage rate at 52.9%. Looking at the breakdown, there was no large difference between the current usage rate and the needs in "mobile work," while there was a difference of 21.7 percentage points (2.6 times) in "place for telework," for which the usage rate was 13.4% and the needs were 35.1%. Although "place for telework" considerably lags behind "mobile work" in terms of introduction, the needs for a place for telework are at a similar level.

**Figure 19: Usage Rate and Needs for Workstyle-related Measures (Calculation for Telework Measures)**

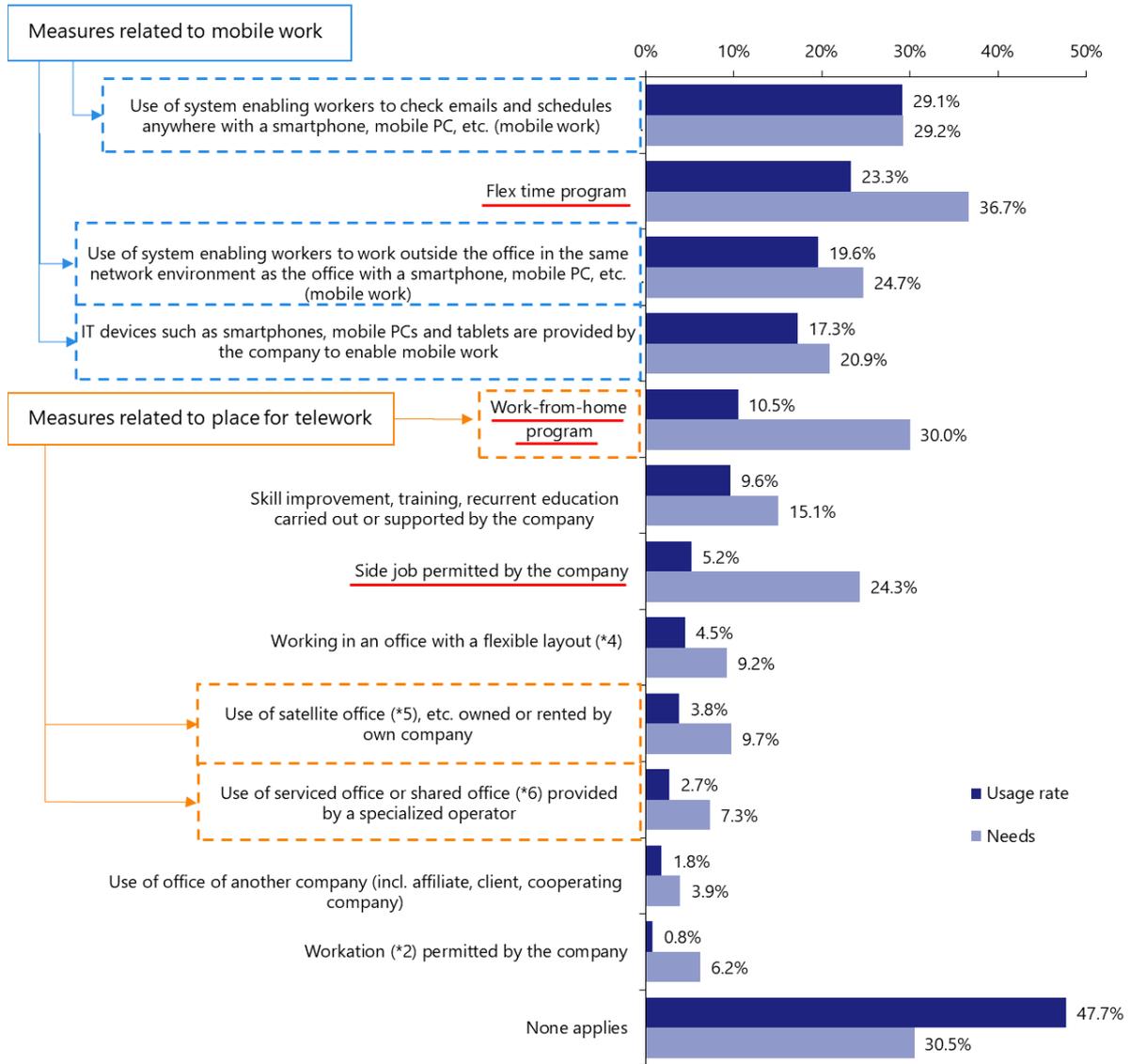


(Replies of all respondents (n=2,060); excerpt from Figure 20 and re-calculated)

- \*1 Refers to "work-from-home program," "use of serviced office or shared office provided by a specialized operator," and "use of satellite office or other similar facility owned or rented by own company."
- \*3 Refers to "use of system enabling workers to check emails and schedules anywhere with a smartphone, mobile PC, etc. (mobile work)," "use of system enabling workers to work outside the office in the same network environment as the office with a smartphone, mobile PC, etc. (mobile work)," and "IT devices such as smartphones, mobile PCs and tablets are provided by the company to enable mobile work."

When comparing the needs and usage rate of the different measures including measures other than telework, the needs exceeded the usage rate in all measures (Figure 20). The gap between the usage rate and needs was especially large in “flextime program,” “work-from-home program,” and “side job.” Since the needs generally tend to be high if the current usage rate was high, it is possible that the needs for measures that have not been introduced are not manifested as it is difficult to get a picture of how to use the measure or the benefits gained from introducing the measure. For example, the reason for the low needs for serviced offices or shared offices may be due to the fact that such offices are not yet widespread.

**Figure 20: Usage Rate and Needs for Workstyle-related Measures (Details)**



(Replies of all respondents (n=2,060); multiple answers)

- \*2 Workation: A portmanteau of working vacation, meaning to work from a travel destination, etc.
- \*4 Flexible layout: Hot desks, group hot desks, open meeting space, space for refreshing, ABW, canteen, café space, etc.
- \*5 Satellite office: An office located near a major railway station or the suburbs for the benefit of employees' commuting time, equipped with facilities similar to those of the main office.
- \*6 Regardless of contract terms such as shared use with another company or dedicated section for own company.

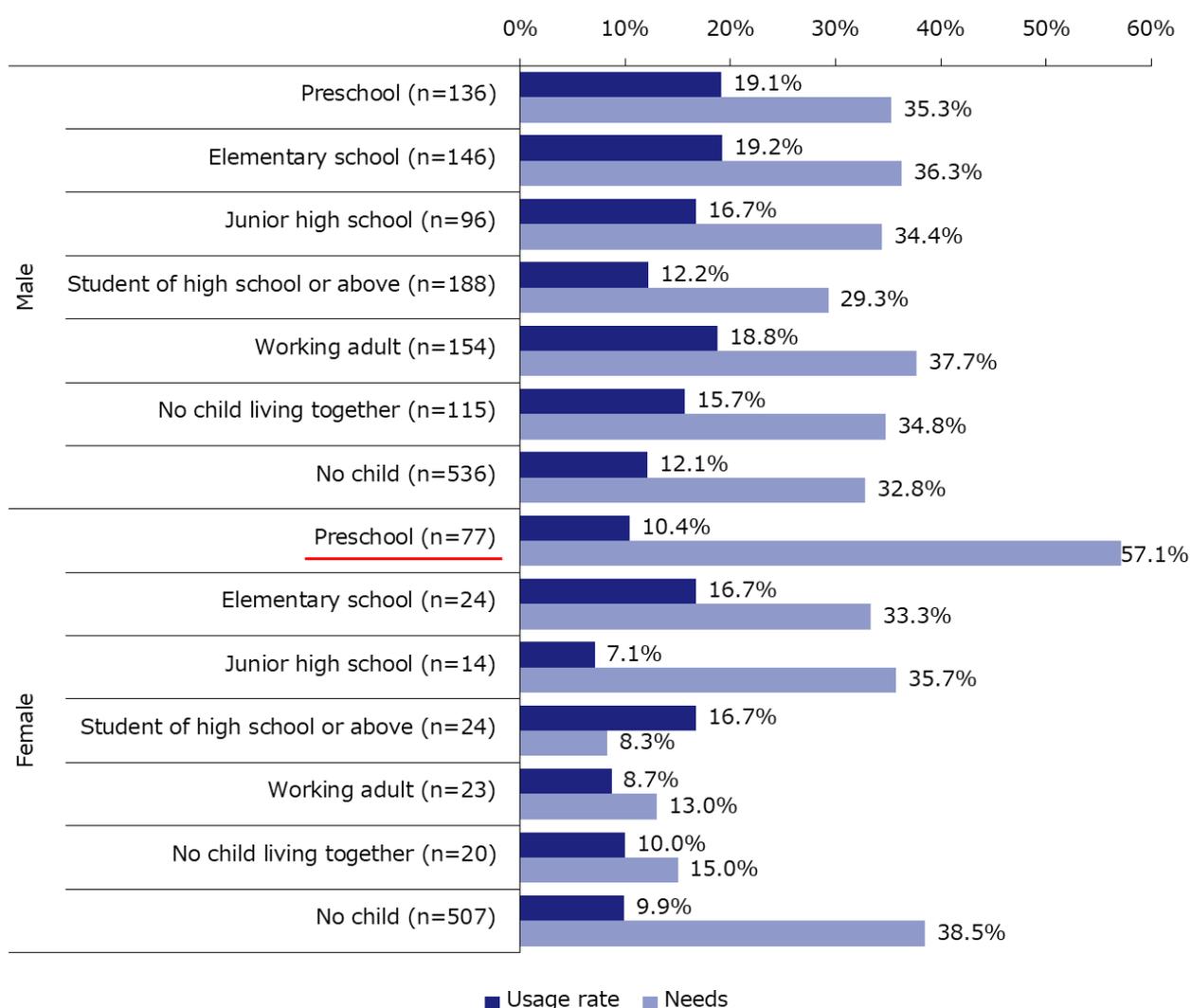
**PICK UP**

**Attributes of Workers with Teleworking Needs**

Thus far we have identified that the needs for a place for telework was large. Who specifically has such needs?

We compared the usage rate and needs of workers for a place for telework by the status of the youngest child (from preschool to working adult) living in the same household (**Figure 21**). The usage rate of female workers was generally low, regardless of the status of the child, and the gap between the usage rate and the needs was the largest among female workers living with a preschool child, with the usage rate at 10.4% and the needs the highest at 57.1%. This indicates that although telework is believed to enable workers with a preschool child to balance childcare and work, places for telework have not yet been provided enough to accommodate the needs.

**Figure 21: Usage Rate and Needs for “Place for Telework” (By Youngest Child Living Together)**



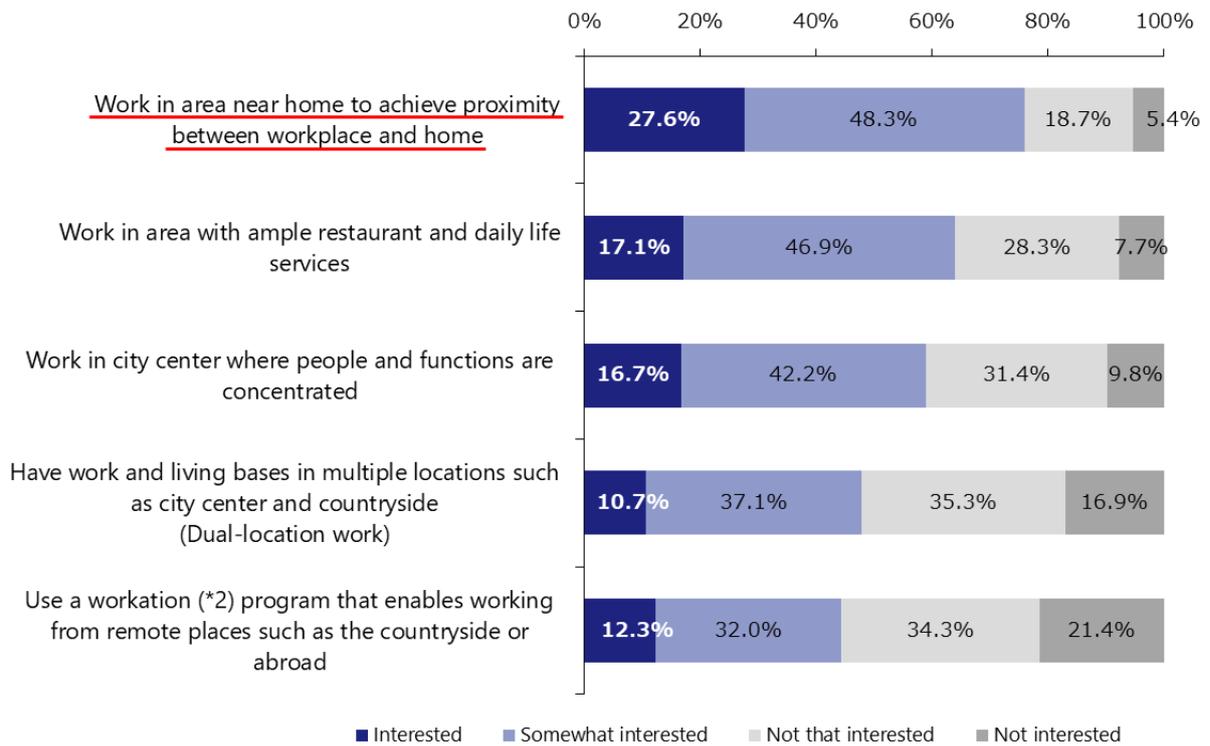
2-2. Interest in work location

- ✓ Workers are more interested in “working in an area near home to achieve proximity between workplace and home” (75.9%) than “working in the city center where people and functions are concentrated” (58.9%).

**Figure 22** shows how much the respondents are interested in the five options concerning work location. Of the five options, workers were interested the most in “work in an area near home to achieve proximity between workplace and home,” with the sum of “interested” and “somewhat interested” amounting to 75.9%. There was a difference of 17.0 points from “work in the city center where people and functions are concentrated” (58.9%), which indicates that, combined with the needs for working from home as we saw in **Figure 20**, workers are more interested in working close to home than in the city center.

Furthermore, amid the gradual spread of telework, more than 40% of the workers showed an interest in “dual-location work” (47.8%) and “workation” (44.3%), which are more advanced workstyles than telework. This indicates that these are attracting attention as new workstyles not bound to geographic area.

**Figure 22: Interest in Work Location**



(Replies of all respondents (n=2,060))

\*2 Workation: A portmanteau of working vacation, meaning to work from a travel destination, etc.

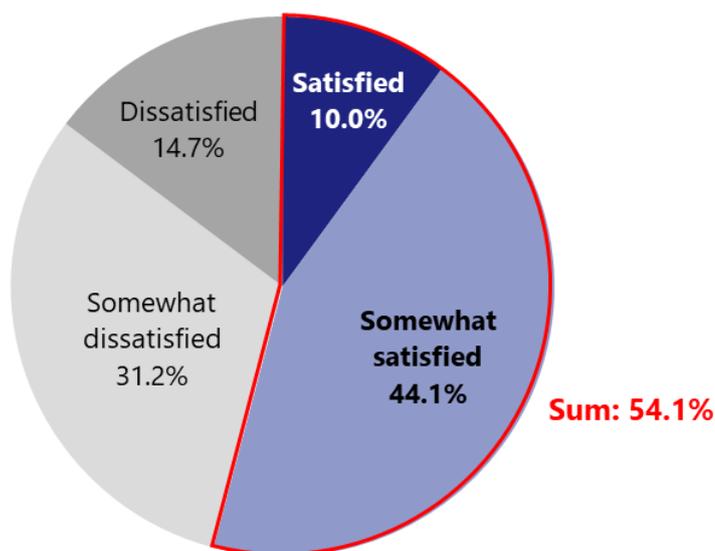
### 3. Satisfaction, well-being

- ✓ Only one in two workers were satisfied with their current workstyle or thought their workstyle or work environment was good for their physical and mental well-being.
- ✓ When comparing workers who used a place for telework and those who did not, there was a large gap in their satisfaction in their workstyle and their evaluation of their well-being.

In the previous chapter, we described workers’ needs for telework and the values they held in the place to work. Then, to what degree are workers satisfied with their current workstyle? We looked into the relationship between workers’ workstyles and their degree of satisfaction.

As for the workers’ satisfaction in their current workstyle, the percentage of workers who replied they were either “satisfied” or “somewhat satisfied” was 54.1% (**Figure 23**). In view of the fact that one in two people were dissatisfied, companies are faced with the need to change their traditional workstyles.

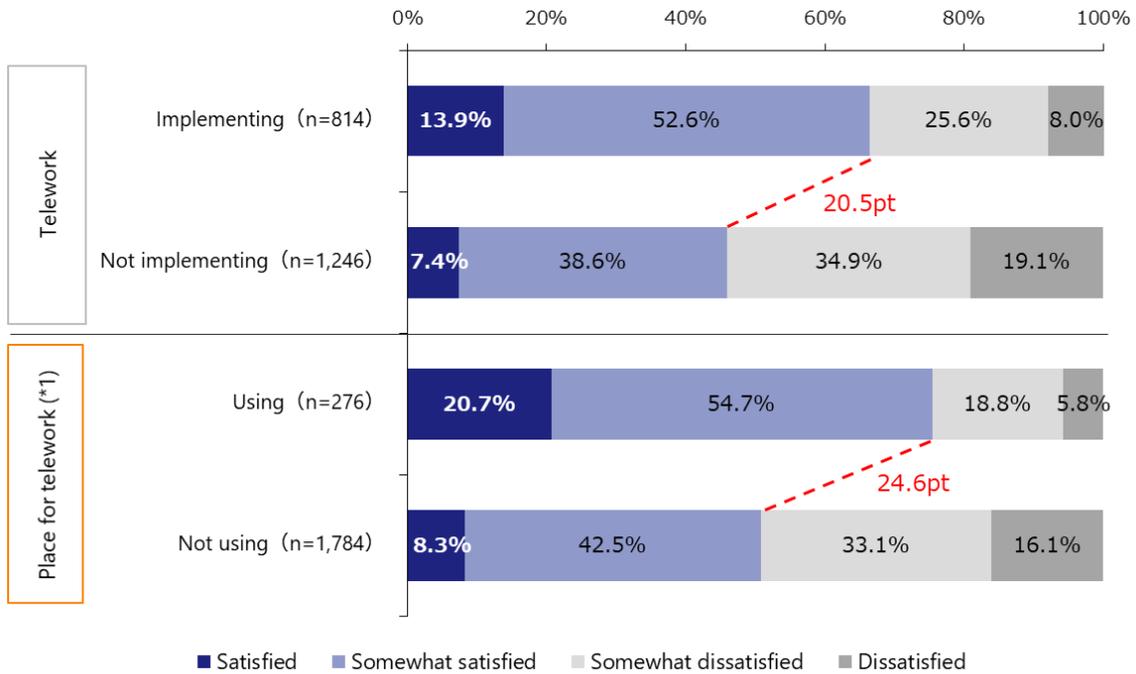
**Figure 23: Satisfaction in Workstyle**



(Replies of all respondents (n=2,060))

There is actually a difference of 20.5 points in workers’ satisfaction in telework, in which workers have high needs, between the implementation statuses (**Figure 24 (upper two bars)**), indicating that carrying out telework measures will be effective for improving workers’ satisfaction in their workstyles. When focusing on “place for telework,” the difference in satisfaction was 24.6 points (**Figure 24 (lower two bars)**).

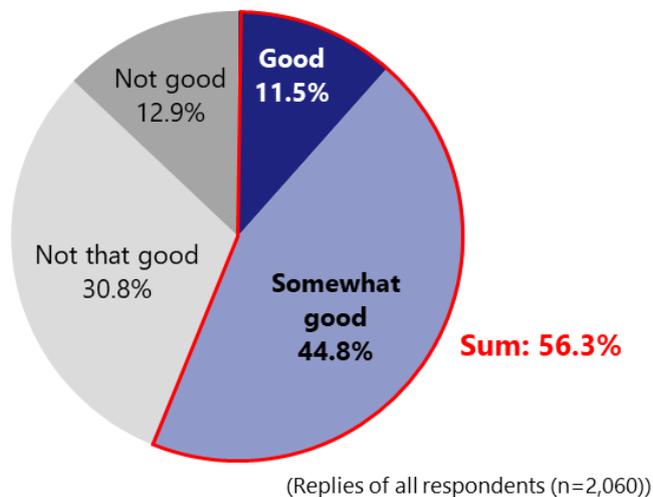
**Figure 24: Satisfaction (By Teleworking Status)**



\*1 Refers to “work-from-home program,” “use of serviced office or shared office provided by a specialized operator,” and “use of satellite office or other similar facility owned or rented by own company.”

We then asked the workers whether they thought their current workstyle or work environment was good for their physical and mental well-being. The percentage of those who replied “good” or “somewhat good” was 56.3%, revealing that the situation should be improved urgently as nearly half of the workers, as in the degree of satisfaction, thought their workstyle or work environment was “not good (or not that good)” (**Figure 25**).

**Figure 25: Well-being**



Separately, we asked the respondents to describe the reason why they replied that their current workstyle or work environment was “(somewhat) good” or “not (that) good” for their physical and mental well-being. Many cited “commute” as the reason for being both good and bad, which suggests that commuting stress is a factor that affects workers’ well-being. Other reasons for being good for well-being that workers place importance on include a good corporate culture and an environment where workers can work with autonomy. On the other hand, popular reasons for being bad for well-being included dissatisfactions in the facilities and tangible aspects of the office, indicating that there is room for improvement in these areas. The following are some of the replies.

**■Reference material■ Description of reason for being good or bad for well-being (excerpt)**

<Reasons for being good for well-being>

- I do not get tired from commuting since I can work from home.
- There is no stress from commute since I work flex time.
- Commuting is easy since the workplace is close from home.
- There is a culture of allowing freedom in anything.
- The workplace environment is open and relationships between employees are good.
- I can work at my own pace.
- I can work without being pressed since work is left to the discretion of each individual.

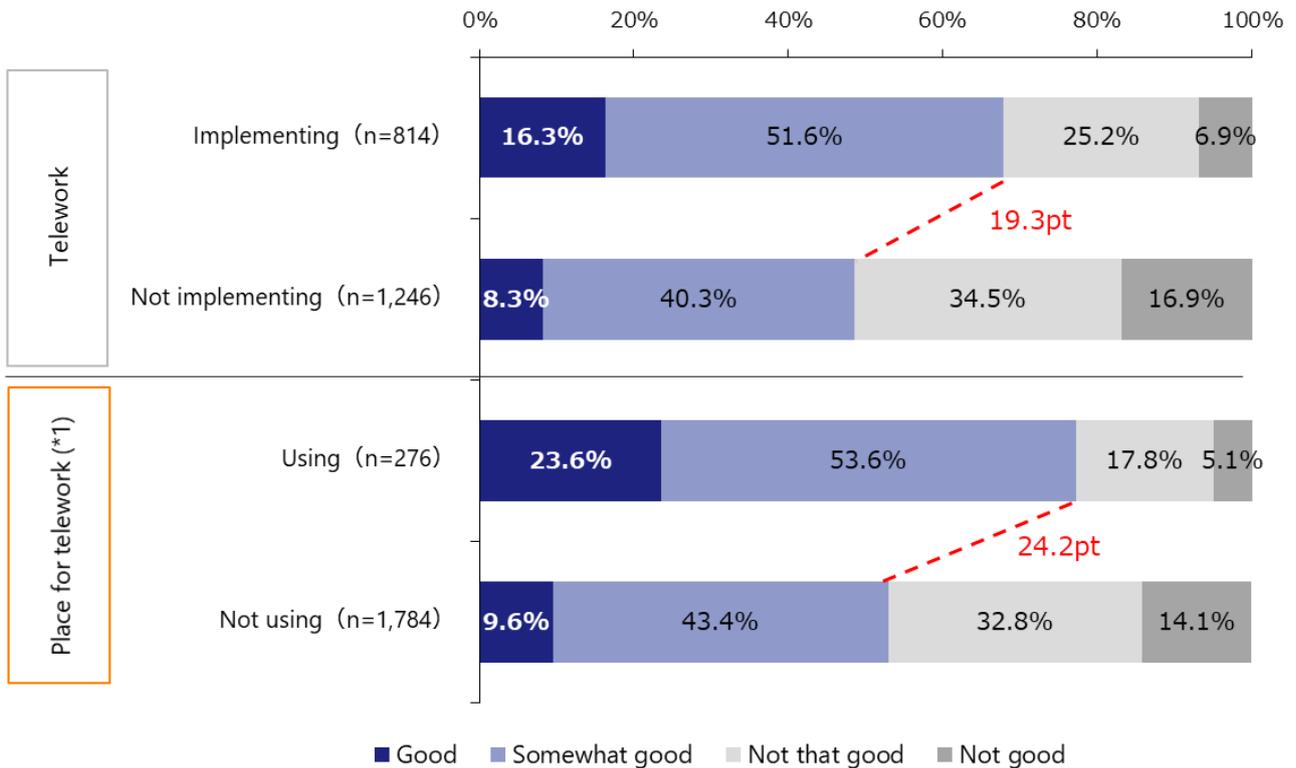
<Reasons for being bad for well-being>

- Commute is long.
- I waste my energy in a long commute in a packed train.
- I must commute in a crowded train.
- There is no space to refresh oneself.
- The building is old and dirty with bad ventilation.
- Air conditioning does not work well.
- Work is inefficient since it is based on the assumption that work is done in the office and cannot be done outside.

We also compared workers' evaluation of well-being by teleworking status and the use of a place for telework, and found a difference in evaluation as in the results for satisfaction (Figure 26). In particular, the use of a place for telework is thought to lead to less commuting stress, which was cited as a factor that affects well-being. There was actually a 24.2-point difference depending on the usage status (Figure 26 (lower two bars)).

These results suggest that providing a place for telework is important from the perspective of worker satisfaction as well as of well-being.

**Figure 26: Well-being (By Teleworking Status)**



\*1 Refers to "work-from-home program," "use of serviced office or shared office provided by a specialized operator," and "use of satellite office or other similar facility owned or rented by own company."

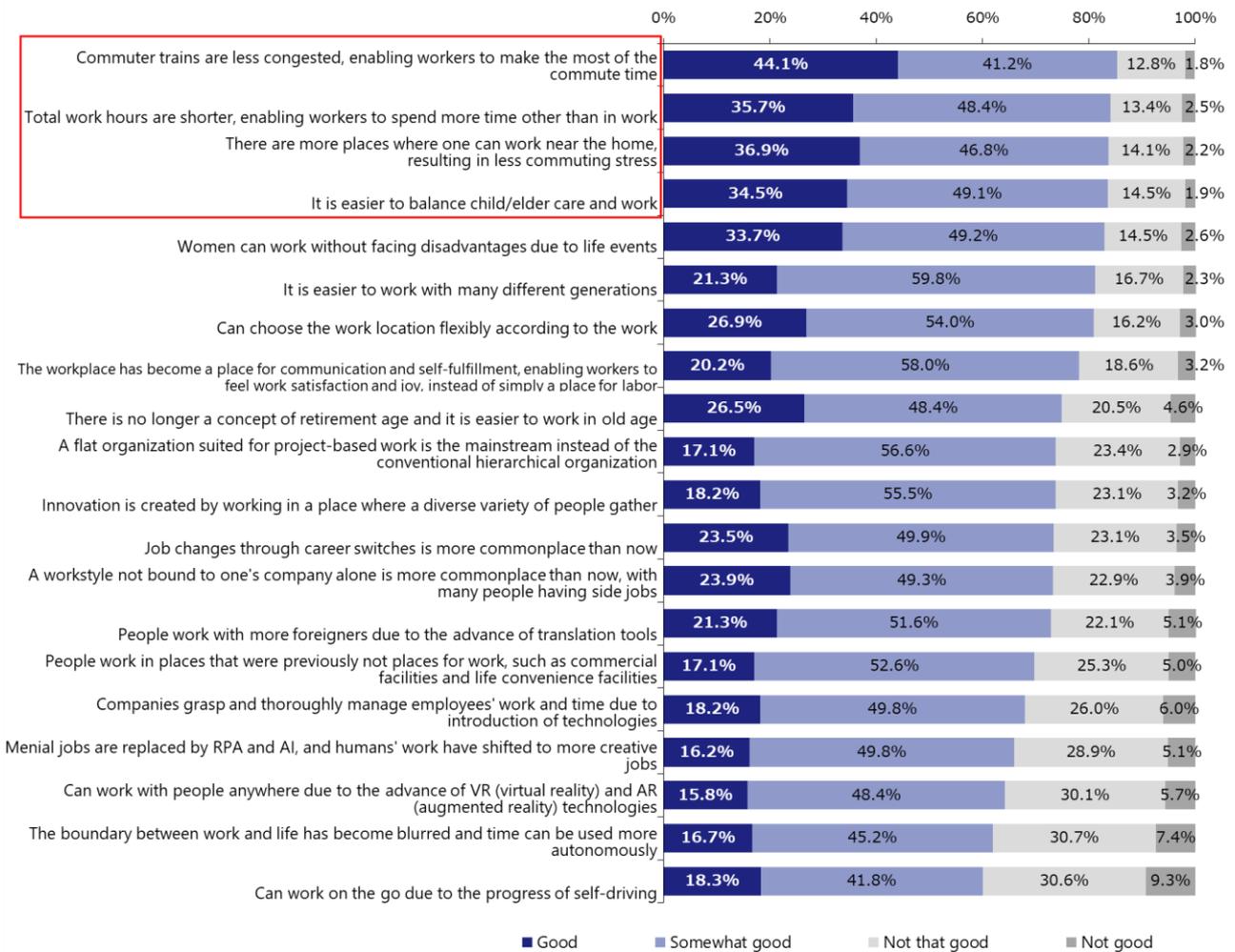
## 4. Future Workstyles

✓ The top replies of workers' ideal future society or workstyle were, "commuter trains are less congested, enabling workers to make the most of the commute time" (85.3%), "total work hours are shorter, enabling workers to spend more time other than in work" (84.1%), "there are more places where one can work near the home, resulting in less commuting stress (83.7%), and "it is easier to balance child/elder care and work" (83.6%), which indicate workers' interest in reducing commuting stress and improving work-life balance.

Lastly, we will look into workers' values concerning the future society and workstyles in 2025.

We asked the workers how they felt about several projected future workstyles on a scale of "good," "somewhat good," "not that good," to "not good." When focusing on the sum of "good" and "somewhat good" future workstyles the top replies were "commuter trains are less congested, enabling workers to make the most of the commute time" (85.3%), "total work hours are shorter, enabling workers to spend more time other than in work" (84.1%), "there are more places where one can work near the home, resulting in less commuting stress (83.7%), and "it is easier to balance child/elder care and work" (83.6%), which indicate workers' interest in reducing commuting stress and improving work-life balance (Figure 27).

**Figure 27: Workers' Values toward Future Society and Workstyles**



(Replies of all respondents (n=2,060))

## 5. Summary

In this report, we examined the reality of office workers' workstyles and looked into the benefits and importance of providing places for telework, in particular, based on the relationship with workers' degree of satisfaction, among others.

From the status of workstyle reform initiatives of workers' employers and workers themselves, we found that the largest portion of workers replied that their workstyle had not changed even if their employer was carrying out workstyle reforms and that there remained a gap between between workstyle reforms and workers' actual workstyles amid the spread of companies' initiatives in the reforms.<sup>\*7</sup> Furthermore, our analysis revealed that, while the usage rate of telework has grown to around 40%, the main telework measure that is being used is "mobile work," with only around 10% of workers being provided with workplace options such as the home, serviced or shared offices, and satellite offices.

Meanwhile, the needs for flexible workstyles including telework are higher than the current usage rates. In particular, there is currently a large gap between the usage rate and needs for a place for telework among female workers with a preschool child, indicating that a further spread of telework is desired for women with small children to balance childcare and work. In addition, there is a large interest not only among workers with small children but in general in working in an area near the home (proximity between workplace and home) than in working in the city center, which is proof of the needs for a wide range of work locations, including the suburbs. Furthermore, our analysis pointed out that workers' values concerning workstyles and work locations are diversifying, as a certain number of them are interested in dual-location work and workation, which are workstyles not bound to their usual place of residence or workplace.

We also found that there was a difference in workers' degree of satisfaction and evaluation of their workstyle and environment in terms of well-being depending on how much the worker used workstyle measures carried out by the company. In particular, workers who used a place for telework tended to have a higher degree of satisfaction in their workstyle and a higher evaluation toward well-being.

However, what is important is not simply promoting telework but to provide in an integrated manner an environment that facilitates workers to work. For example, in the question asking workers about their dissatisfaction in their current workstyle and work environment, many workers replied that "office environment of company/organization is inadequate." Developing an environment of an office that will be the main workplace and a place for employees to gather should continue to be focused on, in addition to providing places for telework. In this survey, we found that workers of all natures of work engaged in various types of work. Companies providing a wide range of spaces suitable for all work types in their main office to provide workstyle and work location options for workers may be the first step to developing a worker-friendly environment in an integrated manner. After doing so, they should start to provide various options outside the main office, such as serviced or shared offices and satellite offices, as ways to alleviate workers' commuting stress and respond to their needs to work close from home.

In this report, we focused on the effectiveness of companies providing various work location options to workers. However, the true objective of companies is to ensure that workers are fulfilled both physically and mentally and can work productively. In order to achieve this objective, it will not be enough for companies to simply introduce programs and equipment related to workstyles but will be as important to continue operating and improving the programs and equipment from the perspective of the workers, who are the

users. Furthermore, we identified in this survey that workers' needs for a place for telework remained at 35.1%, which is higher than the current usage rate but means that a little more than 60% of the workers are not conscious of their work environment. For companies' initiatives to become more effective, it may also be necessary for the workers to choose their workstyle and work location autonomously and be more aware of leading it to improving their productivity and creating value. Xymax Real Estate Institute will continue to conduct company surveys and worker surveys in parallel to capture the effect of such changes in awareness and demand on workers' work location.

\*7 From *Metropolitan Areas Office Demand Survey Autumn 2019*, released on November 27, 2019

### Survey Overview

Survey period: October 2019 / Area: Greater Tokyo (Tokyo, Kanagawa, Saitama, Chiba prefectures) / Method: Online survey

Targets of the survey: (1) Screening: 20,000 men and women aged between 15 and 69; (2) Main survey: Valid responses were obtained from 2,060 men and women aged between 20 and 69 whose profession is officer or staff of a company or organization, whose job category is managerial, specialized or technical, clerical or sales, and whose regular workplace is in Greater Tokyo (Tokyo, Kanagawa, Saitama, and Chiba prefectures).

### Attributes of Respondents

|                     |   | %     | n                  |                                 |   | %                         | n     |     |
|---------------------|---|-------|--------------------|---------------------------------|---|---------------------------|-------|-----|
| Gender and age      | Male aged 20–29   | 2.5%  | 51                 | Form of employment              | Officer of company/organization                                     | 7.3%                      | 151   |     |
|                     | Male aged 30–39   | 8.3%  | 171                |                                 | Staff of company/organization (management)                          | 24.6%                     | 507   |     |
|                     | Male aged 40–49   | 21.7% | 446                |                                 | Staff of company/organization (Regular staff other than management) | 53.7%                     | 1,107 |     |
|                     | Male aged 50–59   | 24.2% | 499                |                                 | Staff of company/organization (Other than regular staff)            | 14.3%                     | 295   |     |
|                     | Male aged 60 or above                                   | 9.9%  | 204                |                                 |   |                           |       |     |
|                     | (Male total)  | 66.6% | 1,371              | Industry                        | Manufacturing   | 31.1%                     | 640   |     |
|                     | Female aged 20–29                                       | 7.3%  | 150                |                                 | Service, infrastructure   | 26.2%                     | 539   |     |
|                     | Female aged 30–39                                       | 10.2% | 210                |                                 | Trading company   | 5.2%                      | 107   |     |
|                     | Female aged 40–49                                       | 9.4%  | 193                |                                 | Retail  | 2.3%                      | 48    |     |
|                     | Female aged 50–59                                       | 5.6%  | 115                |                                 | IT, info processing, software                                       | 17.4%                     | 359   |     |
|                     | Female aged 60 or above                                 | 1.0%  | 21                 |                                 | Advertisement, publishing, media                                    | 1.5%                      | 30    |     |
| (Female total)      | 33.4%   | 689   | Finance, insurance | 9.5%                            | 195   |                           |       |     |
| Managerial position | Company manager   | 3.5%  | 72                 | Other                           | 6.9%  | 142                       |       |     |
|                     | Department head or equivalent                           | 11.7% | 242                | Number of employees             | 1-9   | 8.3%                      | 170   |     |
|                     | Section head or equivalent                              | 16.9% | 349                |                                 | 10-49   | 13.1%                     | 269   |     |
|                     | Team head or equivalent                                 | 12.9% | 266                |                                 | 50-99   | 8.5%                      | 175   |     |
|                     | Not in managerial position                              | 54.9% | 1,131              |                                 | 100-299   | 13.8%                     | 284   |     |
|                     |   |       | 300-999            |                                 | 16.1%   | 331                       |       |     |
| Job category        | Management  | 2.7%  | 55                 | Number of employees             | 1,000-2,999   | 11.2%                     | 231   |     |
|                     | Corporate planning                                      | 4.0%  | 82                 |                                 | 3,000 or more   | 26.1%                     | 538   |     |
|                     | Technical R&D   | 11.1% | 229                |                                 | Don't know  | 3.0%                      | 62    |     |
|                     | Planning, development, marketing of products & services | 5.3%  | 109                |                                 | (Youngest) child living together                                    | Preschool                 | 10.3% | 213 |
|                     | Sales   | 20.6% | 424                |                                 |   | Elementary school student | 8.3%  | 170 |
|                     | Administration  | 6.7%  | 138                | Junior high school student      |   | 5.3%                      | 110   |     |
|                     | HR, labor   | 3.8%  | 78                 | Student of high school or above |   | 10.3%                     | 212   |     |
|                     | Finance & accounting                                    | 7.4%  | 153                | Working adult                   |   | 8.6%                      | 177   |     |
|                     | Legal affairs   | 1.0%  | 21                 | No child living together        |   | 6.6%                      | 135   |     |
|                     | Systems   | 10.3% | 212                | No child                        | 50.6%   | 1,043                     |       |     |
|                     | Other clerical job                                      | 16.6% | 342                |                                 |   |                           |       |     |
| Other               | 10.5%   | 217   |                    |                                 |   |                           |       |     |

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%.

### Contact for inquiries concerning this report

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