Xymax Real Estate Institute
RESEARCH REPORT

Greater Tokyo Office Worker Survey 2020

Capturing changes in workers' work styles and values

November 24, 2020

Many companies must have been forced to review their work styles and how they operate their workplace as a result of the rising attention to work style reforms in recent years as well as the Japanese government's request for teleworking and declaration of a state of emergency following the outbreak of the new coronavirus (COVID-19) in spring 2020. These changes in work styles are expected to affect not only companies' management strategies but also office workers' values.

Against this backdrop, Xymax Real Estate Institute has been conducting questionnaire surveys to capture changes in work styles and the workplace from the perspectives of both companies and office workers. We have conducted nine questionnaire surveys of companies since autumn 2016 and four surveys of office workers since the end of 2016 on a regular basis. This report summarizes the latest trend of the actual work styles and values of workers working in Greater Tokyo, based on the results of the fifth office worker survey conducted in September 2020.

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.pdff

・*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

・*Greater Tokyo Office Worker Survey 2019*, released on December 19, 2019
https://www.xymax.co.jp/english/research/images/pdf/20191219.pdf

Summary of Survey Results

1. Going to the office under the COVID-19 pandemic

- **37.3% of all respondents went to work in the office entirely** and did not telework.
- The most popular reason for going to the office was **"There is work that can only be done in the office (e.g., custom of using seals)" (57.9%)**.
- **The implementation rate of work style measures had risen in all measures** compared to the 2019 survey. **Working from home (58.6%) had risen significantly**, in particular.

2. Telework under the COVID-19 pandemic

- **62.7% of all respondents were "teleworkers,"** i.e., workers who worked from home, worked at a satellite office, or teleworked at other places. We also found that **14.2% were "workers with temporary telework experience,"** i.e., workers who had implemented any of the above temporarily before or after the COVID-19 outbreak but no longer implemented.
- Teleworkers **teleworked for an average of 53.8% of their time** over one week. A distribution breakdown shows that **"1%–10%" and "91%–100%" each accounts for nearly 20%, indicating a polarization in the implementation of telework**.
- The most popular benefit of working from home and working in a satellite office was a **reduction in travel/commute time.**

3. Changes in work styles from before the pandemic to the present

- More respondents replied that workload **decreased (21.9%) than increased (14.2%)**.

- A **drop in work motivation (25.7%) was 16.4 points more than a rise (9.3%)**. An **increase in stress (35.7%) was 20.5 points more than a decrease (15.2%)**.

4. Work styles after the COVID-19 pandemic

- **75.3% of all respondents wished to telework even a little** in the future, which is more than the current telework ratio.
- The **average percentage of time workers wished to telework** over one week was **52.2%.** A distribution breakdown shows that **the most popular ratio is "41%–50%" (23.7%)**.

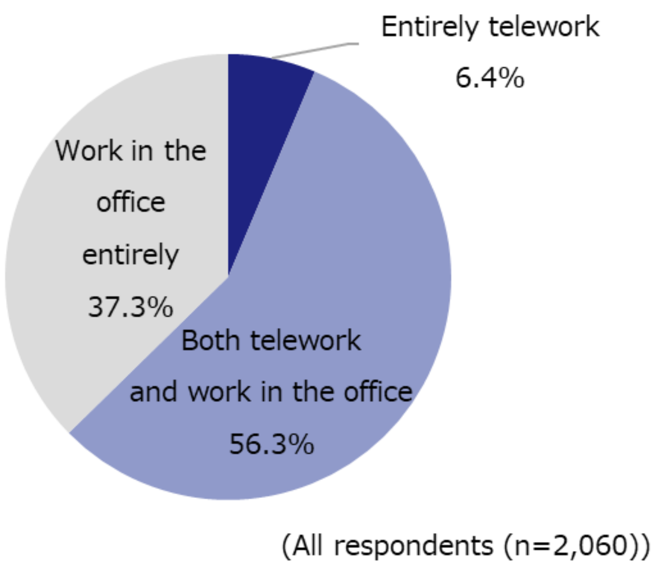
1. Going to the office under the COVID-19 pandemic

- ✓ 37.3% of all respondents went to work in the office entirely and did not telework.
- ✓ The most popular reason for going to the office was "There is work that can only be done in the office (e.g., custom of using seals)" (57.9%).
- ✓ The implementation rates of work style measures had risen in all measures compared to the 2019 survey. Working from home (58.6%) had risen significantly, in particular.

In this survey, we obtained valid answers 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, whose regular office was located in Greater Tokyo (Tokyo, Kanagawa, Saitama, and Chiba prefectures), and whose principal workplace was the office or home. In this report we will look into the actual situations of how the respondents currently work.

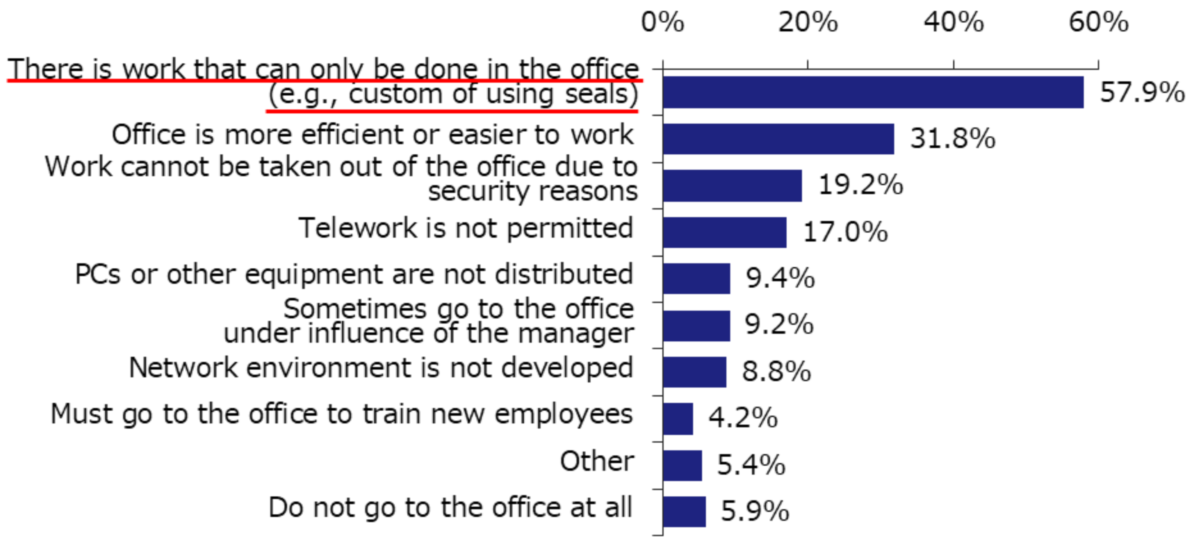
We will start by looking at how many workers went to the office to work under the COVID-19 pandemic. At the time of the survey, 37.3% of all respondents worked in the office entirely and did not telework **(Figure 1)**. For workers who teleworked even a little, we asked how they split their time between working in the office and teleworking over one week on average. Only 6.4% replied that they teleworked 100%, indicating that many workers both teleworked and worked in the office. Most workers, including those who worked in the office entirely, went to the office to some degree.

Figure 1: Going to the Office or Teleworking



We then asked the respondents their reason for going to the office. More than half of the workers replied, "There is work that can only be done in the office (e.g., custom of using seals)" (57.9%), far outweighing the second most popular reason, which was "Office is more efficient or easier to work" (31.8%) **(Figure 2)**.

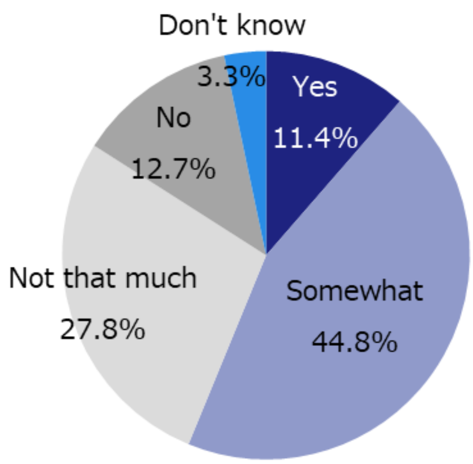
Figure 2: Reason for Going to the Office



(All respondents (n=2,060); multiple answer (MA))

We then asked if their regular office was safe and secure in terms of layout and operation. 56.2% of all respondents answered either "Yes" or "Somewhat," indicating that a majority felt their office was safe and secure **(Figure 3)**. Meanwhile, 40.5% of the respondents replied either "No" or "Not that much."

Figure 3: Evaluation of Safety and Security of the Office

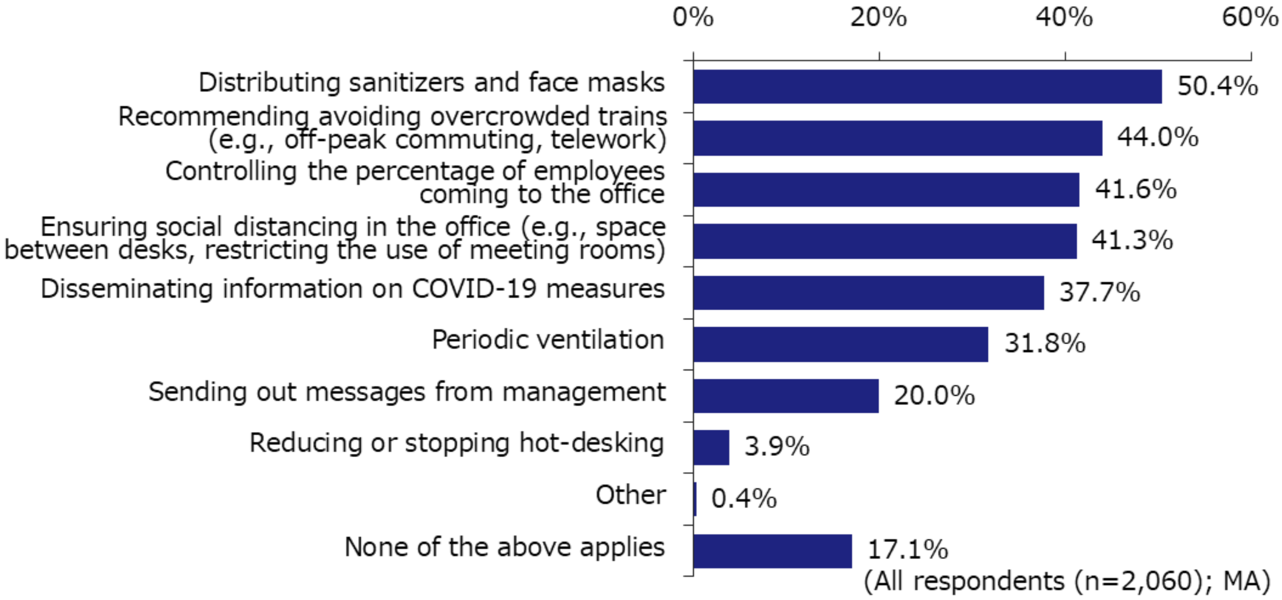


(All respondents (n=2,060))

When we asked the workers who thought their office was safe and secure the reason for that evaluation, the popular reasons were their companies' measures against COVID-19, such as reliable infection control measures, the ensuring of social distancing, and the controlling of the percentage of employees coming to the office. On the other hand, the popular reasons for not thinking their office was safe or secure included the lack of distance or partitions between employees and the lack of changes in office strategies from before the pandemic. These results indicate that workers are rigorously assessing their companies' infection control measures.

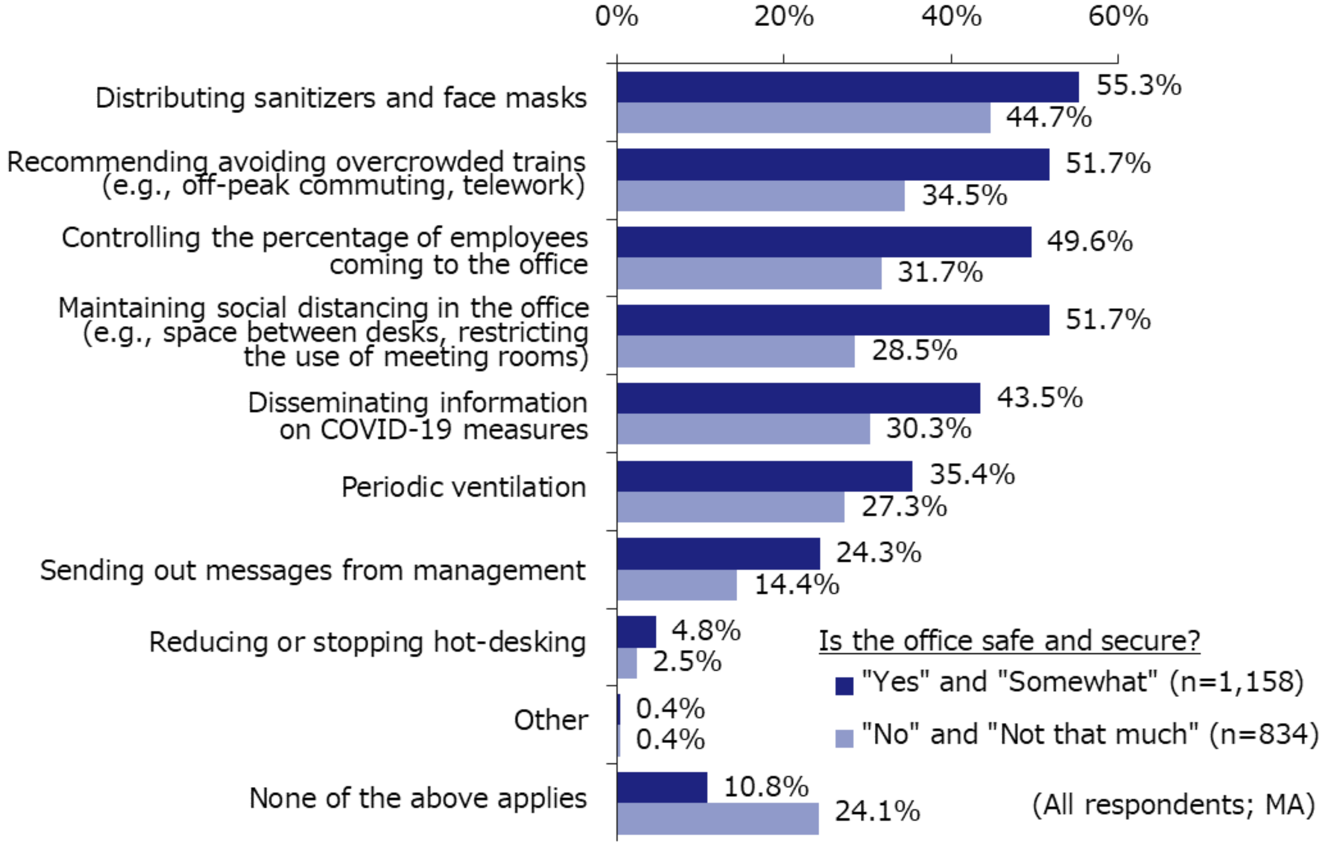
Then, how much efforts are companies currently making concerning employees coming to the office and the office itself? When we asked the respondents whether their company implemented the initiatives we listed, the initiative that was implemented the most was "Distributing sanitizers and face masks" (50.4%), which suggests that this can be implemented by companies relatively easily **(Figure 4)**. The result also revealed that the companies of more than 40% of the respondents recommended avoiding overcrowded trains (e.g., off-peak commuting, telework) (44.0%), controlled the percentage of employees coming to the office (41.6%), and ensured social distancing in the office (e.g., space between desks, restricting the use of meeting rooms) (41.3%).

Figure 4: Companies' Implementation Rate of Initiatives Concerning the Office and Employees Coming to the Office



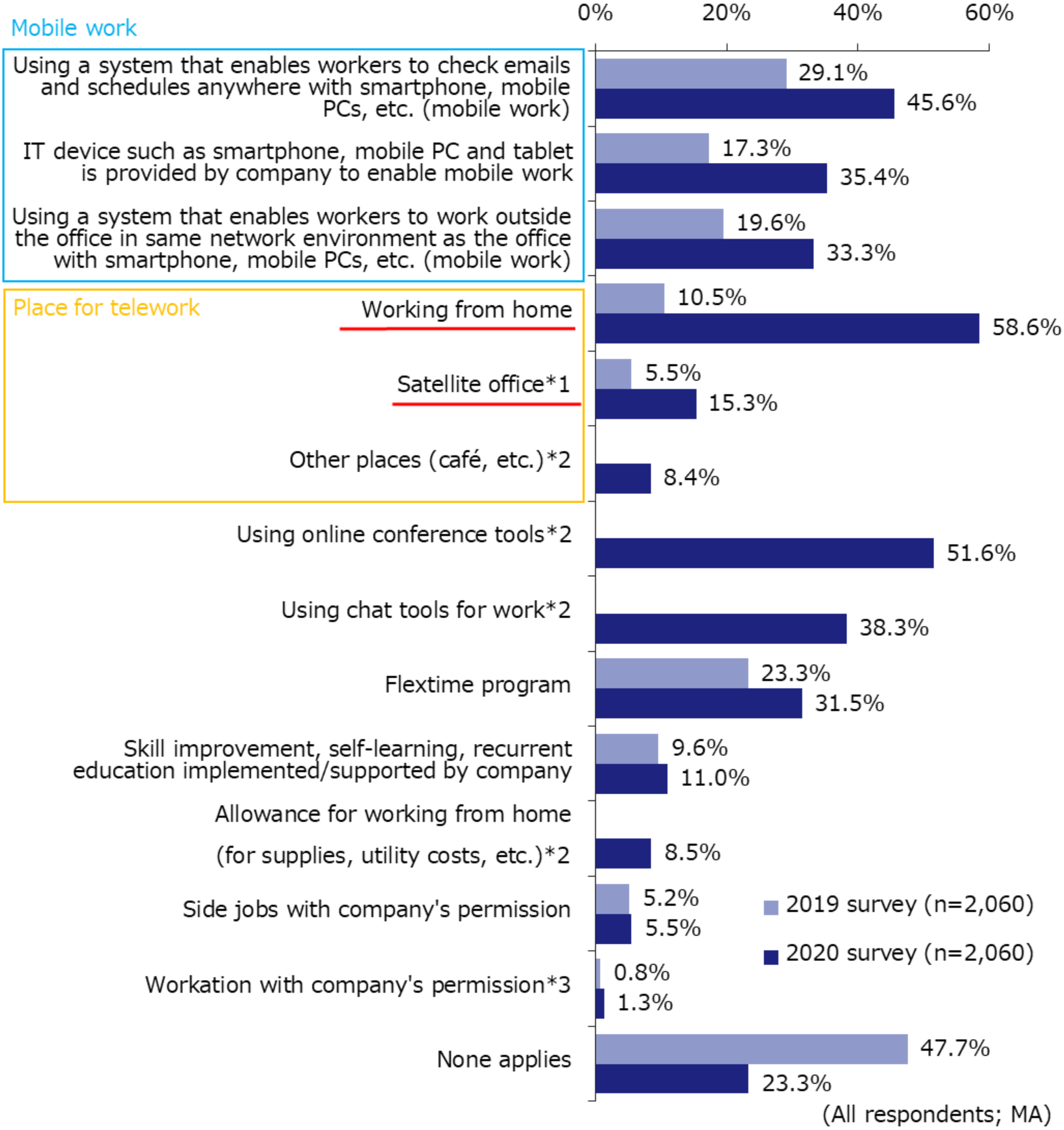
When we looked at this result based on the respondents' evaluation of their office's safety and security (**Figure 3**), we found that the implementation rate was higher in all initiatives among the group of respondents who thought their office was safe and secure **(Figure 5)**. Meanwhile, the percentage of "None of the above applies" was large at 24.1% among the group of workers who did not think their office was safe or secure, which suggests that companies' implementation of initiatives will lead to an improvement in the assessment by workers.

Figure 5: Companies' Implementation Rate of Initiatives Concerning the Office and Employees Coming to the Office (By Evaluation of Safety and Security)



We then asked the respondents which work style measure they currently used or implemented. Compared to the results of the 2019 survey, the implementation rate has risen in all measures, especially in working from home (from 10.5% to 58.6%) **(Figure 6)**. In terms of the place for telework, satellite offices have also risen by almost 10 percentage points (from 5.5% to 15.3%). The results also reveal that measures offering flexibility in where and when to work, such as mobile work measures and flextime programs, are becoming more widespread.

Figure 6: Implementation Rate of Work Style Measures



*1 Satellite office: A collective term for workplaces established for telework, apart from the main office or the home. There are those that are provided by specialized service operators and those that are provided by the company. Since the options in the 2019 survey were "Use of satellite office, etc. owned or rented by own company" and "Use of serviced office or shared office provided by a specialized operator," the percentage of the 2019 survey in Figure 6 is the percentage of respondents who chose either one of the two in 2019.

*2 There is no chart for the 2019 survey since the option was added in the 2020 survey.

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

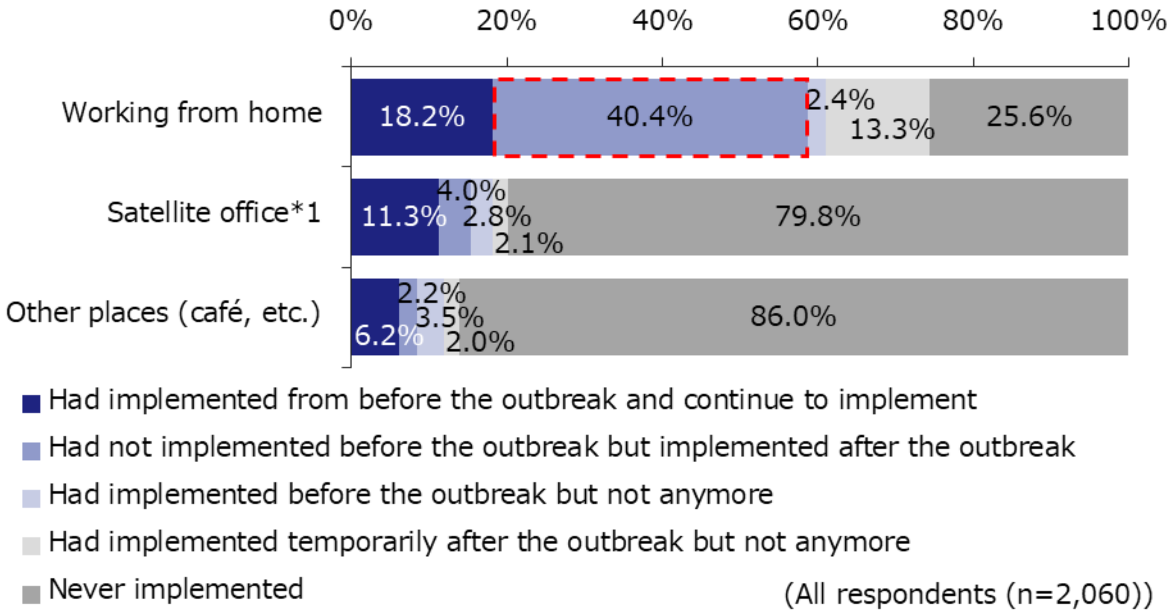
2. Telework under the COVID-19 pandemic

- ✓ 62.7% of all respondents were "teleworkers," i.e., workers who worked from home, worked at a satellite office, or teleworked at other places. We also found that 14.2% were "workers with temporary telework experience," i.e., workers who had implemented any of the above temporarily before or after the COVID-19 outbreak but no longer implemented.
- ✓ Teleworkers teleworked for an average of 53.8% of their time over one week. A distribution breakdown shows that "1%–10%" and "91%–100%" each accounted for nearly 20%, indicating a polarization in the implementation of telework.
- ✓ The most popular benefit of working from home and working in a satellite office was a reduction in travel/commute time.

In the previous chapter, we found that office workers' places and time to work were becoming flexible rapidly. We believe this is related to the recent situation where telework has half been forced as a way to prevent COVID-19 infection.

Figure 7 indicates the detailed implementation status of the three measures related to telework places (working from home, satellite office, other places (café, etc.)). For working from home, which had the largest increase in implementation (**Figure 6**), 40.4% of all respondents replied that they "had not implemented before the outbreak but implemented after the outbreak," which confirms the intensity of the impact of the COVID-19 pandemic.

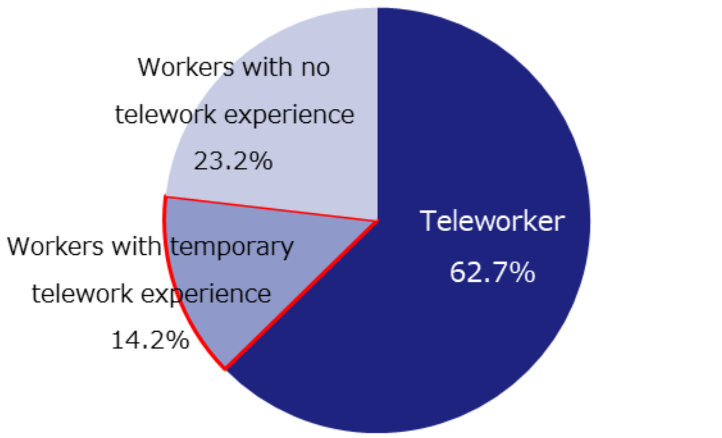
Figure 7: Implementation of Measures in the Place for Telework



*1 Satellite office: A collective term for workplaces established for telework, apart from the main office or the home. There are those that are provided by specialized service operators and those that are provided by the company.

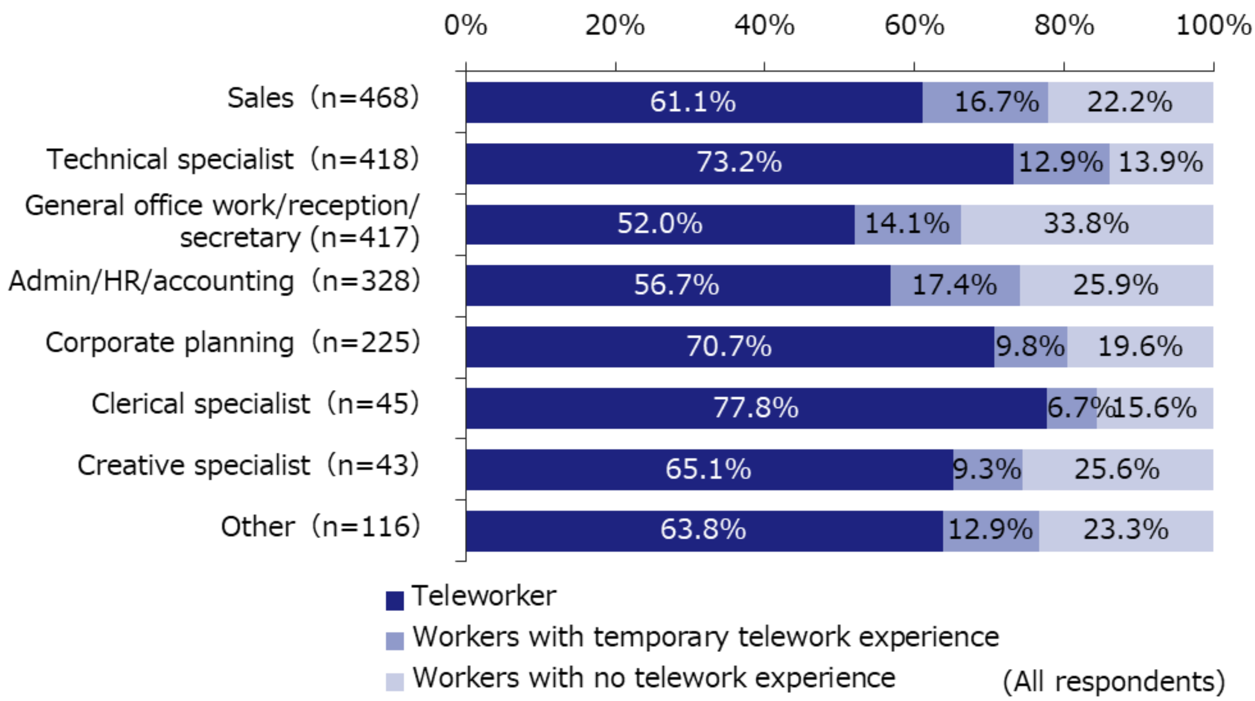
Furthermore, if we recalculate the results by categorizing the respondents who currently implement any one of the three measures related to telework places as "teleworkers" and those who implemented any of the measures temporarily before or after the outbreak of COVID-19 but no longer implemented as "workers with temporary telework experience," teleworkers account for as much as more than 60%. Workers with temporary telework experience also exist to a certain degree (14.2%) **(Figure 8)**.

Figure 8: Implementation of Telework



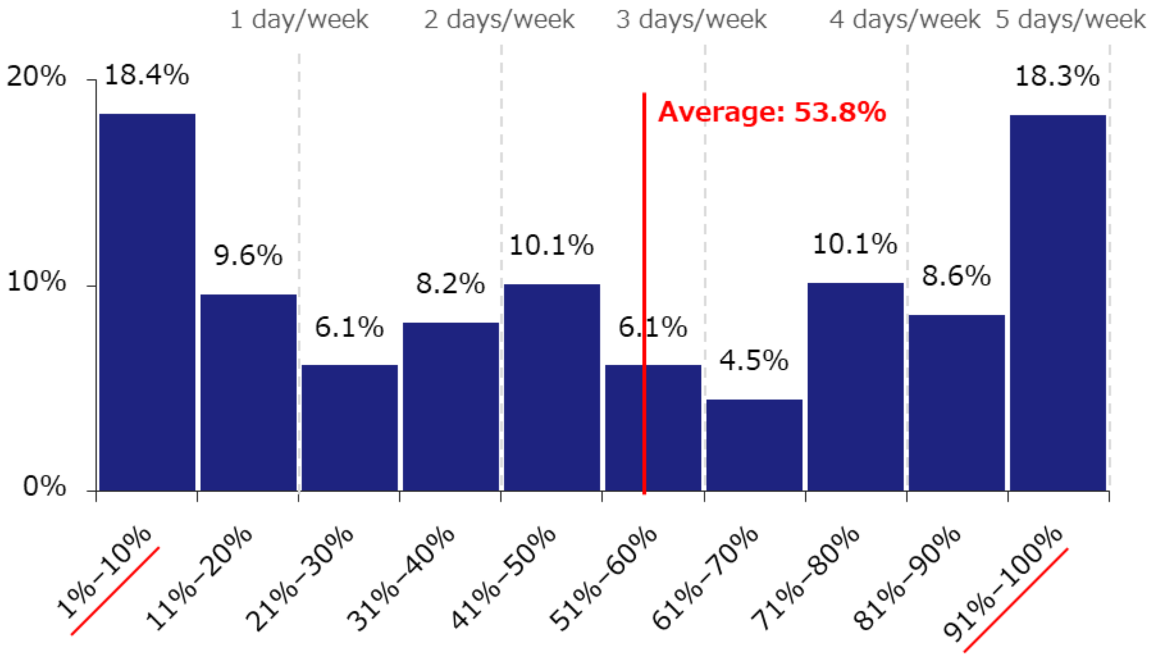
When we look at this result by job category, the percentage of teleworkers was relatively large among "clerical specialists" (77.8%) and "technical specialists" (73.2%), and relatively small among workers in "general office work/reception/secretary" (52.0%) and in "admin/HR/accounting" (56.7%) **(Figure 9)**. Among workers in "admin/HR/accounting" and "sales," workers with temporary telework experience accounted for around 17%.

Figure 9: Implementation of Telework (By Job Category)



When we asked teleworkers how they split their time between working in the office and teleworking on average over one week, the average time they teleworked was 53.8% **(Figure 10)**. A distribution of the telework implementation ratios in 10% increments indicates that the most popular allocations of time are "1%–10%" and "91%–100%," both accounting for nearly 20%. This shows that teleworkers are polarized into those who telework almost every day and those who only telework occasionally.

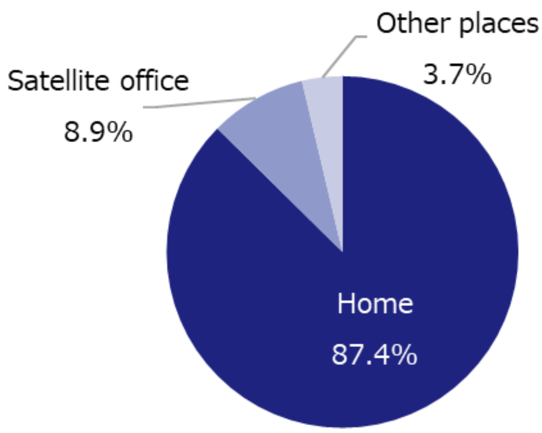
Figure 10: Teleworkers' Telework Ratio



(Teleworkers (n=1,291))

We also asked teleworkers how they split their telework time between "home," "satellite office" and "other places." The percentage of telework time they spent working from home was 87.4% on average, which suggests that telework currently means working from home for workers **(Figure 11)**.

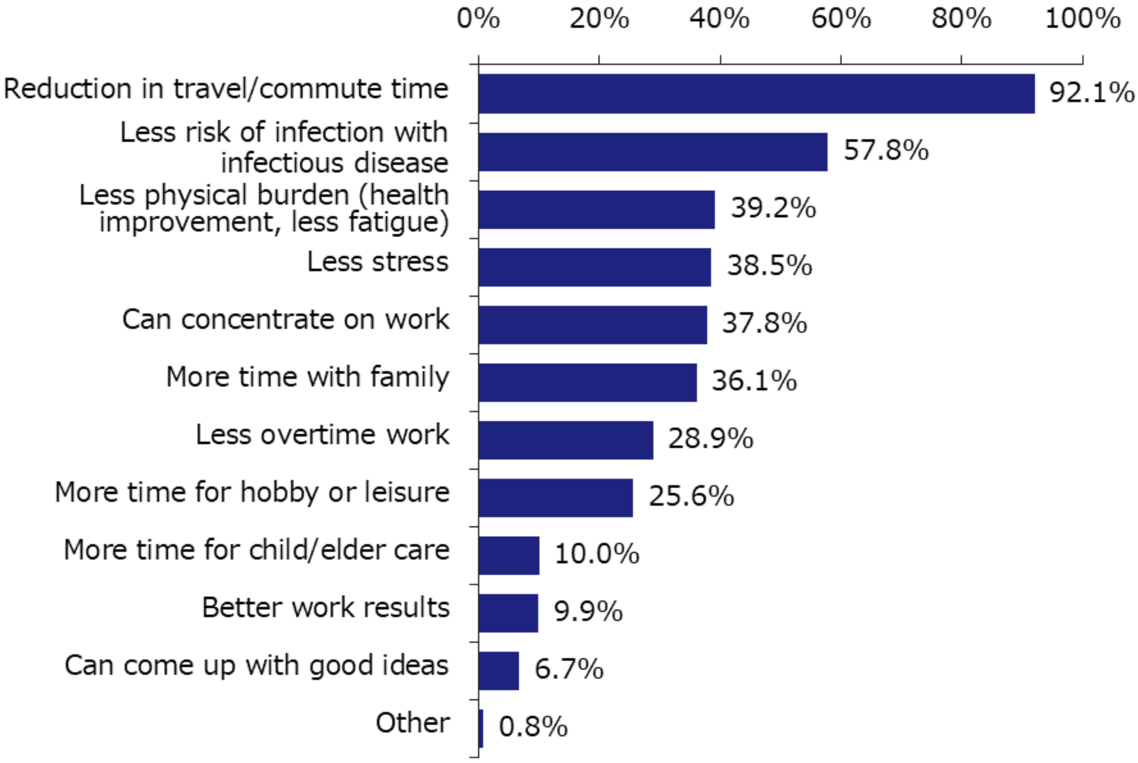
Figure 11: Allocation of Telework Time among the Places for Telework



(Teleworkers (n=1,291))

Figure 12 shows the specific benefits felt by workers who have experienced working from home and who felt there was a benefit. The most popular benefit was "Reduction in travel/commute time" (92.1%), followed by "Less risk of infection with infectious disease" (57.8%). This indicates that the workers, many of whom began working from home after the outbreak of COVID-19 as was shown in **Figure 7**, actually feel that working from home is an effective way of preventing infection with infectious diseases. The top benefits are followed further by "Less physical burden (health improvement, less fatigue)" (39.2%) and "Less stress" (38.5%), indicating that the reduction of physical and mental burdens due to the lack of commuting are felt by workers as major benefits of working from home.

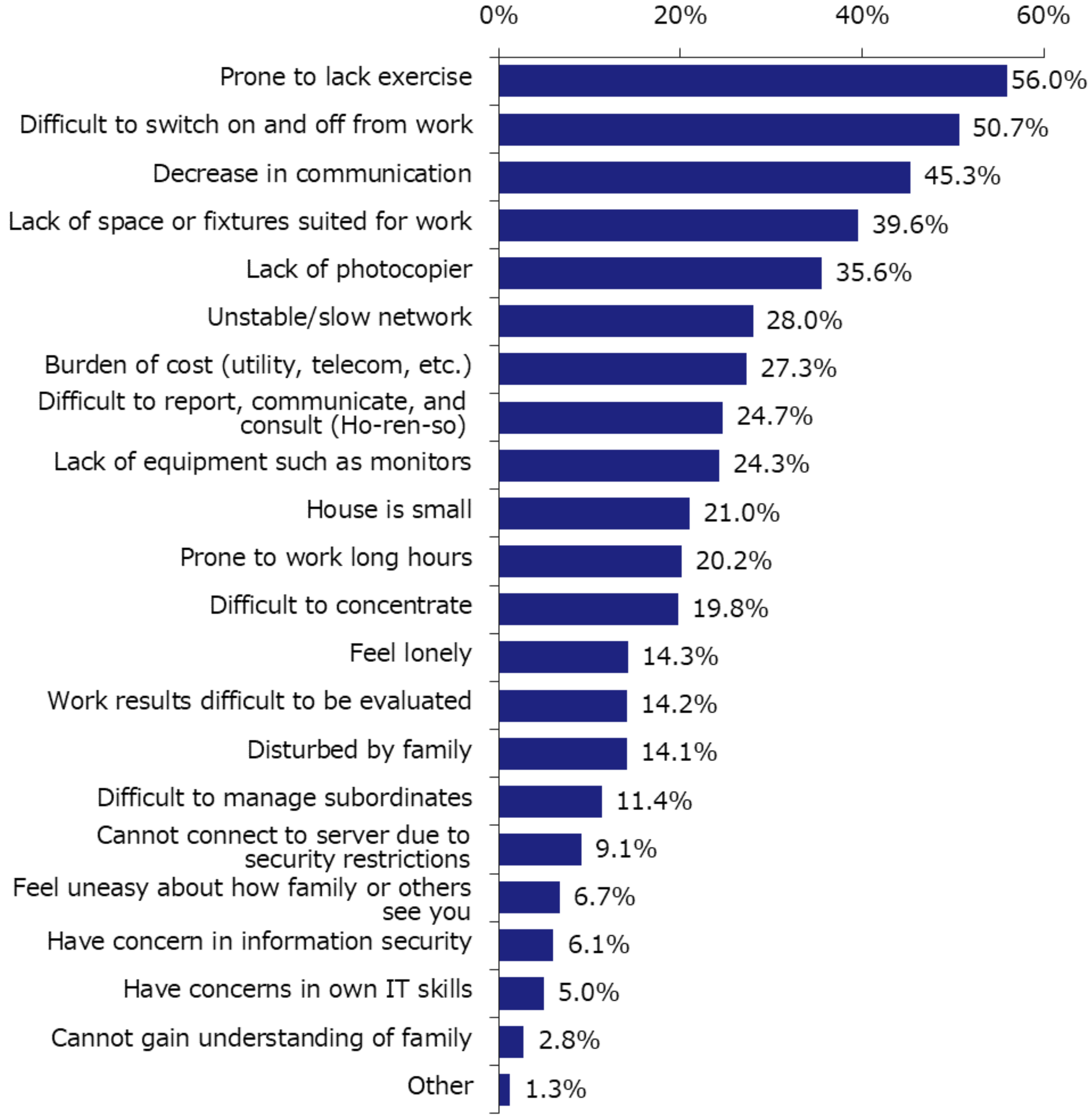
Figure 12: Benefits of Working from Home



(Those with WFH experience who feel there is a benefit (n=1,459); MA)

Similarly, we asked the specific dissatisfactions of workers who have experienced working from home and who were dissatisfied. The top complaints were "Prone to lack exercise" (56.0%) and "Difficult to switch on and off from work" (50.7%), which indicate that not a few workers felt the disadvantages of being confined to home, while others felt the benefits of the reduction of commute time **(Figure 13)**. A certain number of workers were also dissatisfied as they worked from home without the minimum office environment, such as the necessary fixtures as well as photocopiers, Internet connection and monitors. The dissatisfactions are varied due to the diverse environments of each individual, such as the size of their homes and family members they live with.

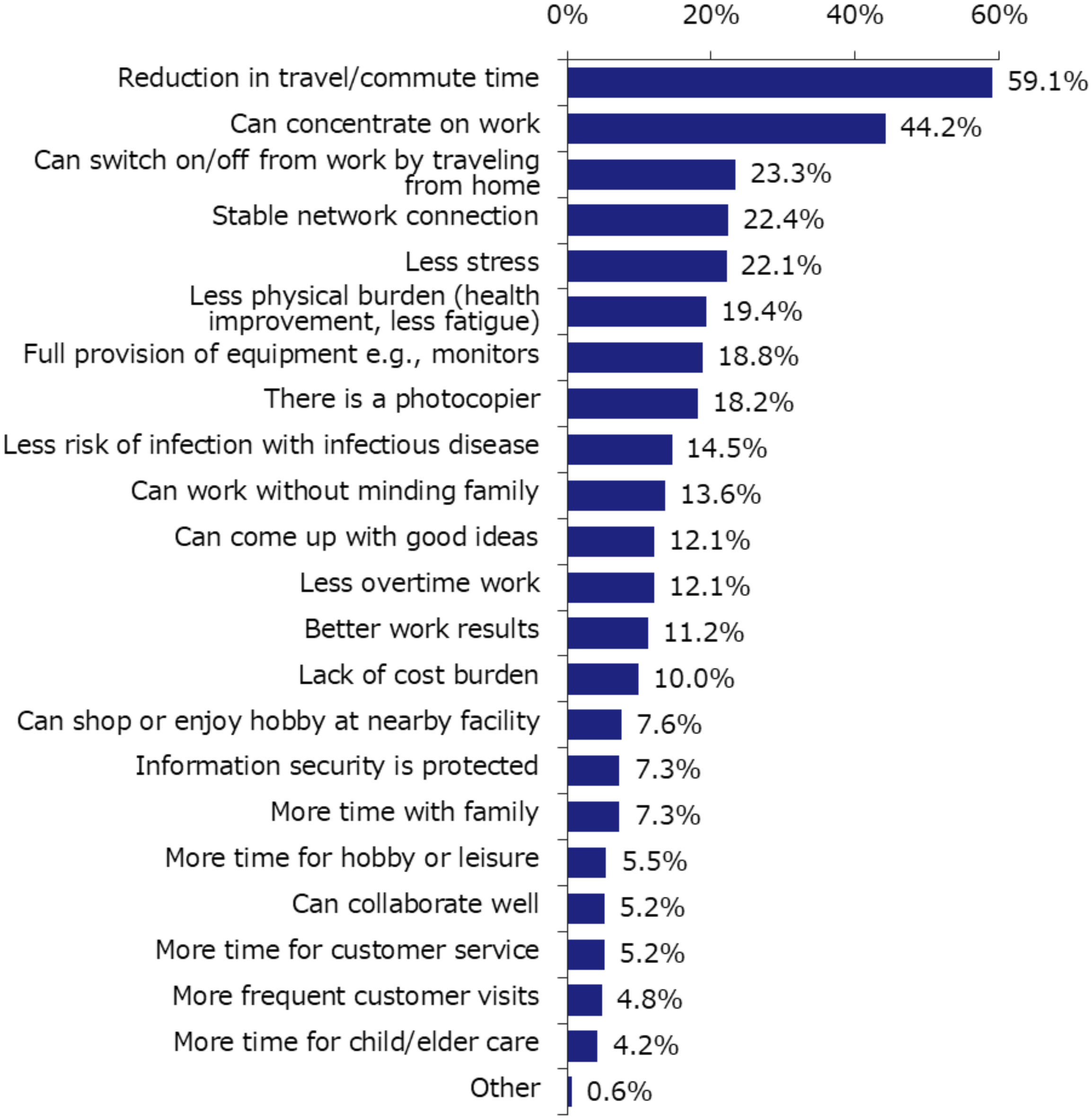
Figure 13: Dissatisfaction in Working from Home



(Those with WFH experience who are dissatisfied (n=1,403); MA)

Figure 14 shows the specific benefits felt by workers who have experienced working in a satellite office and who felt there was a benefit. As in working from home, “Reduction in travel/commute time” (59.1%) was the top benefit. Since satellite offices are prepared as places dedicated to work, the percentage of “Can concentrate on work” (44.2%) was larger than in working from home. Furthermore, the criteria related to “switching on and off from work” and “network connection,” which were listed as dissatisfactions in working from home, ranked among the top benefits of working in a satellite office. Satellite offices would be an effective option for companies introducing telework to solve workers’ dissatisfactions in working from home.

Figure 14: Benefits of Working in a Satellite Office



(Those with experience in working in a satellite office who feel there is a benefit (n=330); MA)

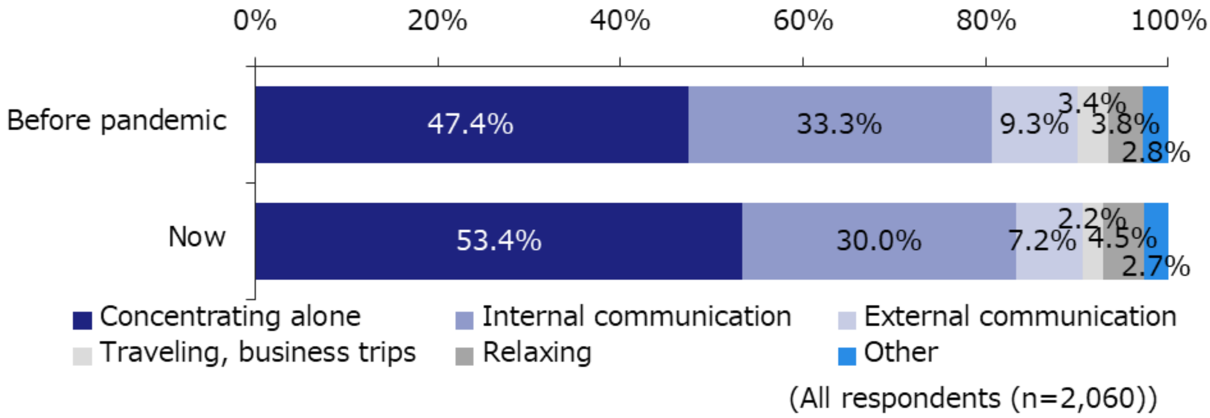
3. Changes in work styles from before the pandemic to the present

- ✓ More respondents replied that workload decreased (21.9%) than increased (14.2%).
- ✓ A drop in work motivation (25.7%) was 16.4 points more than a rise (9.3%). An increase in stress (35.7%) was 20.5 points more than a decrease (15.2%).

Thus far we examined the changes and actual situations of workers' work styles due to the spread of telework following the outbreak of COVID-19. In this chapter, we examine how workers' work content and workload changed from before the pandemic and how the workers feel about the changes.

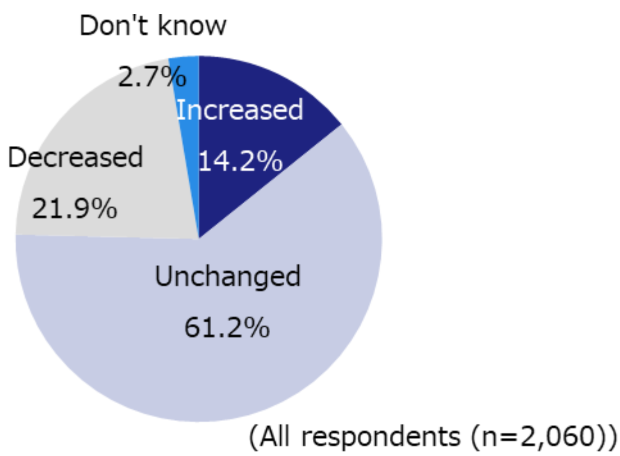
As for changes in work content, we asked the respondents how they split their time among different types of work on average for before the COVID-19 pandemic and the present, and compared the average figures of all respondents **(Figure 15)**. The time spent on work that required "concentrating alone," which accounted for nearly 50% before the pandemic, increased by 6.0 percentage points after the corona outbreak. Meanwhile, the time spent in both internal and external communication decreased slightly.

Figure 15: Average Allocation of Time to Each Type of Work



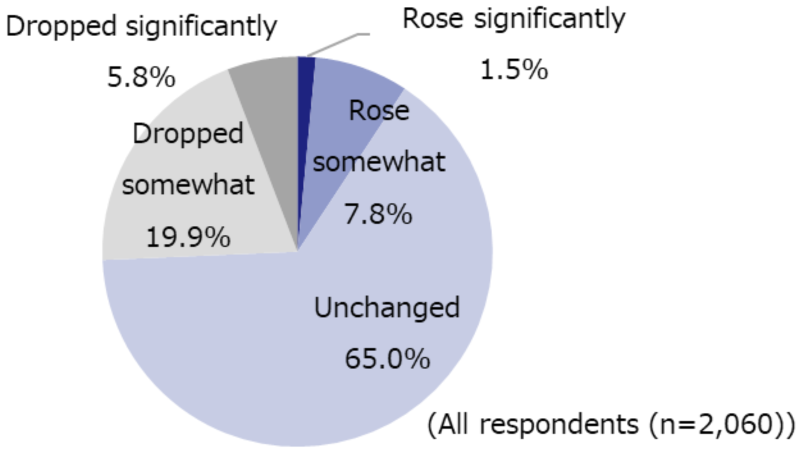
As for changes in the workload, the largest percentage of workers replied it did not change (61.2%). Among workers that experienced a change, workload decreased (21.9%) more than it increased (14.2%) **(Figure 16)**.

Figure 16: Changes in Workload



We then asked about changes in respondents' motivation toward work from before the pandemic. "Unchanged" (65.0%) was the top answer **(Figure 17)**. Among workers that experienced a change, the percentage of a drop (sum of "Dropped significantly" and "Dropped somewhat") (25.7%) was 16.4 points larger than that of a rise (sum of "Rose significantly" and "Rose somewhat") (9.3%).

Figure 17: Changes in Motivation toward Work



The reasons for a rise in motivation included work style changes and greater work responsibilities due to the pandemic. The reasons for a drop in motivation included the urgent shift to telework without enough preparations for telework by the respondent or company and companies' lack of infection control measures. Concerns of infection, the deterioration of the economy, and changes in the content or amount of work were also popular reasons.

■Reference■ Reasons for a Rise/Drop in Work Motivation (Open Ended Question; Excerpt)

<Reasons for a rise>

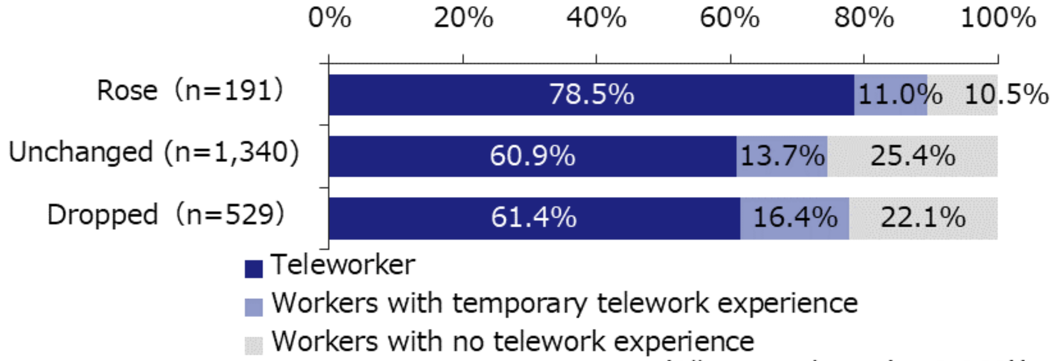
- I can use my time more effectively since I no longer have to spend time in commuting.
- I can work better at home since I can work at my own pace relatively and concentrate.
- Work efficiency has improved since there are less Q&As and small talk.
- I am responsible for more work due to an increase in corona-related work.
- I am grateful that I have work during the pandemic.

<Reasons for a drop>

- Communication is difficult when teleworking.
- I feel lonely due to the dramatic decrease in communication with other people.
- It is difficult to switch on and off from work when you are working from home.
- I often get distracted when I at home and I become lazy since no one is watching me.
- I cannot telework as much as I wish to since a lot of my work requires me to go to the office. My work motivation has dropped since I compare with other employees who can telework as they wish.
- My company seems unwilling to provide an environment that enables employees to work remotely.
- I was doing remote work for some time, but it was immediately called off after the state of emergency was lifted.
- Motivation has declined across the company since the outlook of the company's performance has deteriorated due to COVID-19.

When we look at the implementation of telework by change in work motivation, around 80% of the workers whose motivation has risen implemented telework. The percentage of teleworkers is larger than among workers whose motivation was "unchanged" or "dropped" **(Figure 18)**.

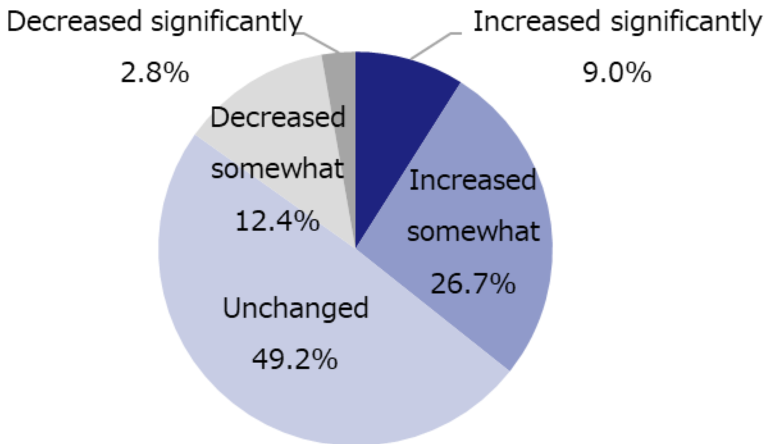
Figure 18: Implementation of Telework (By Change in Motivation)



(All respondents (n=2,060))

We then asked about changes in workers' stress in work styles before and after the outbreak of COVID-19. Nearly half of the respondents (49.2%) replied that there was no change **(Figure 19)**. Among workers who experienced a change, those who replied that stress decreased (sum of "Decreased significantly" and "Decreased somewhat") accounted for 15.2%, while those who replied that stress increased (sum of "Increased significantly" and "Increased somewhat") accounted for 35.7%, 20.5 percentage points larger.

Figure 19: Changes in Stress toward Work Styles



(All respondents (n=2,060))

A popular reason for an increase in stress was the respondents' inability to telework due to work reasons or their company's orders. Causes of stress of employees who did telework included unfamiliarity with teleworking, the decrease in face-to-face communication, and the lack of opportunities for exchange between fellow employees, such as after-work drinks.

Meanwhile, a popular reason for a decrease in stress was the elimination of commuting stress due to telework. Also, while some workers felt the drop in communication due to telework stressful, others viewed it positively as a decrease in interpersonal relationship stress, which suggests that telework affects workers positively and negatively depending on their telework skills, positions, personality and aptitude.

■Reference■ Reasons for an Increase/Decrease in Stress (Open Ended Question; Excerpt)

<Reasons for an increase>

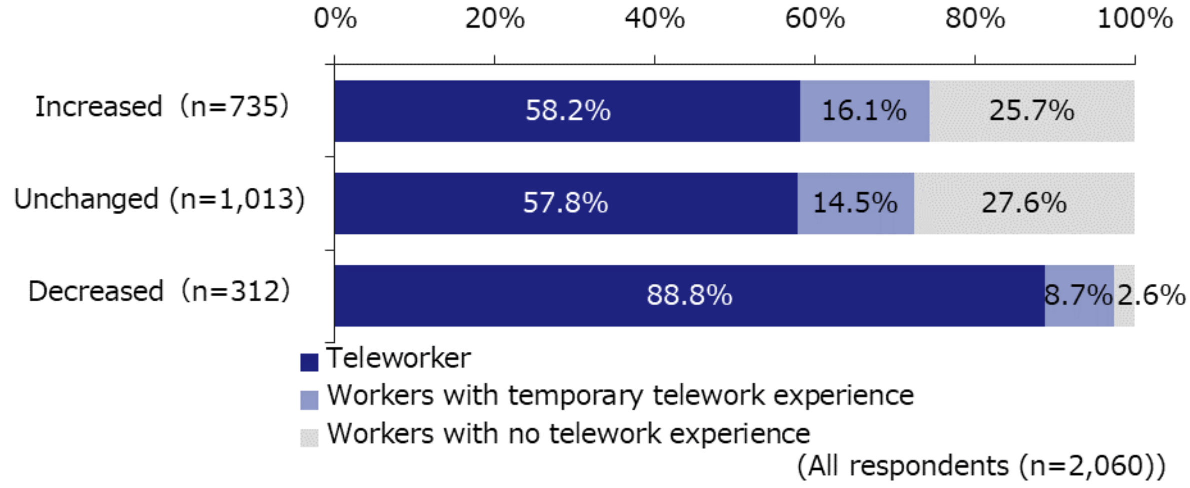
- Although there is work that can be done by telework, telework is not introduced on a company-wide basis.
- Commuting causes stress due to overcrowded trains as well as poses risks of being infected with COVID-19.
- Communication is difficult unless it is face-to-face.
- I find it hard to get used to online meetings.
- I must be always attentive to preventing infection.
- I can no longer release stress with meals and drink parties.
- Concerns toward the economy.

<Reasons for a decrease>

- Since telework is recommended, I can reduce commute time and avoid overcrowded trains.
- Telework has made interpersonal relationships easier and enabled me to work at my own pace.
- It is easier to achieve a work-life balance by working from home.
- Working from home has given me more time to relax.
- Unnecessary meetings have decreased.

In terms of the implementation of telework by change in stress, around 90% of workers whose stress has decreased implemented telework **(Figure 20)**. It is likely that telework has contributed to the reduction of stress.

Figure 20: Implementation of Telework (By Change in Stress)



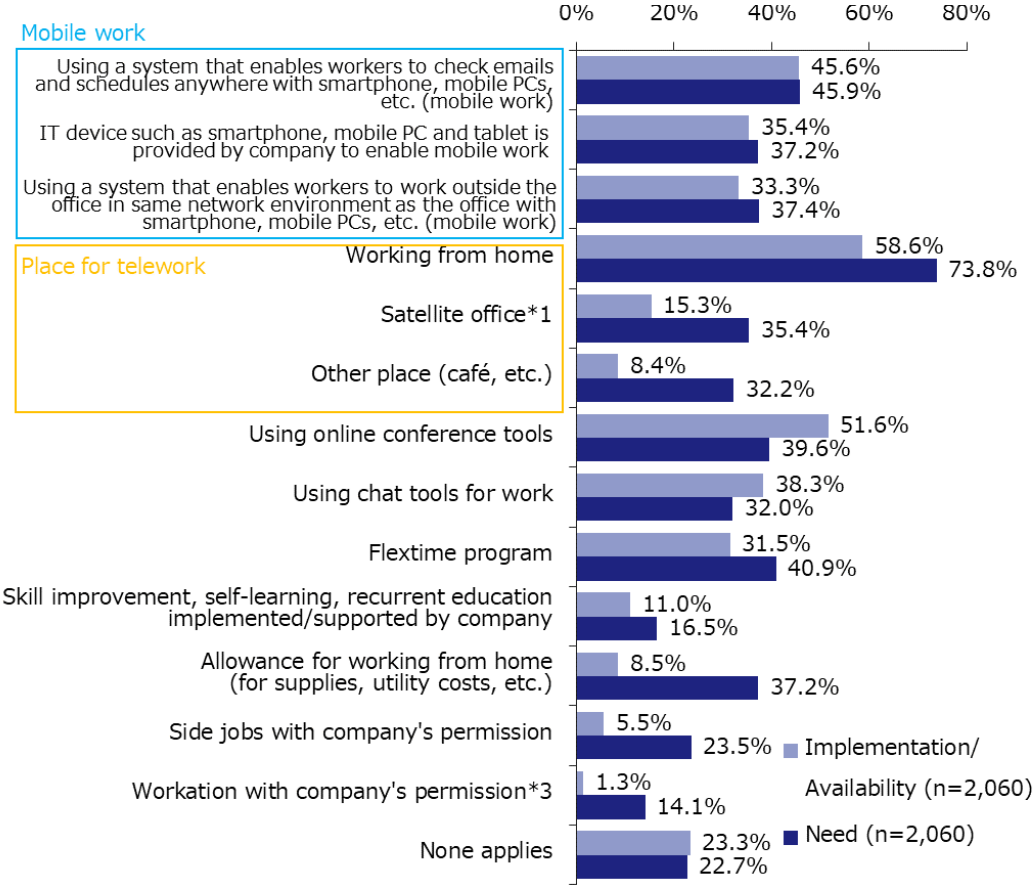
4. Work styles after the COVID-19 pandemic

- ✓ 75.3% of all respondents wished to telework even a little in the future, which is more than the current telework ratio.
- ✓ The average percentage of time workers wished to telework over one week was 52.2%. A distribution breakdown shows that the most popular ratio is "41%–50%" (23.7%).

Lastly, we examined respondents' needs in work styles going forward.

We asked respondents which work style measure they wanted to use or implement after the pandemic has abated. We found that there was a larger gap between the current implementation rate and respondents' needs in the three measures related to the place for telework compared to measures related to mobile work, etc. **(Figure 21)**. Furthermore, while the work-from-home program has proliferated, the availability of "allowance for working from home (for supplies, utility costs, etc.)," an associated measure, was low at 8.5% but the need for it was nearly 40% (37.2%). "Side job with company's permission" (23.5%) and "Workation with company's permission" (14.1%) also showed a larger percentage of need than the current implementation rate.

Figure 21: Needs in Work Style Measures



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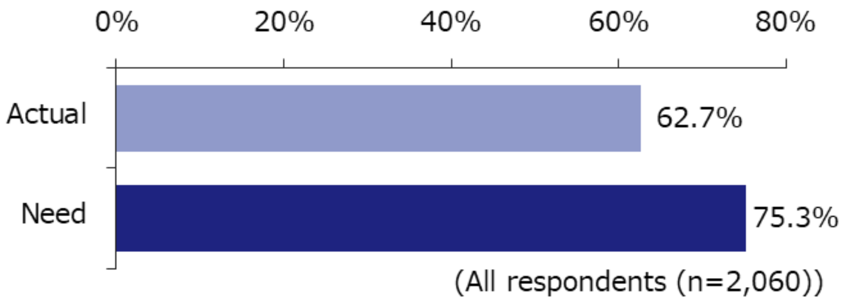
*3 Workation: A portmanteau of working vacation, meaning to work from a travel destination, etc.

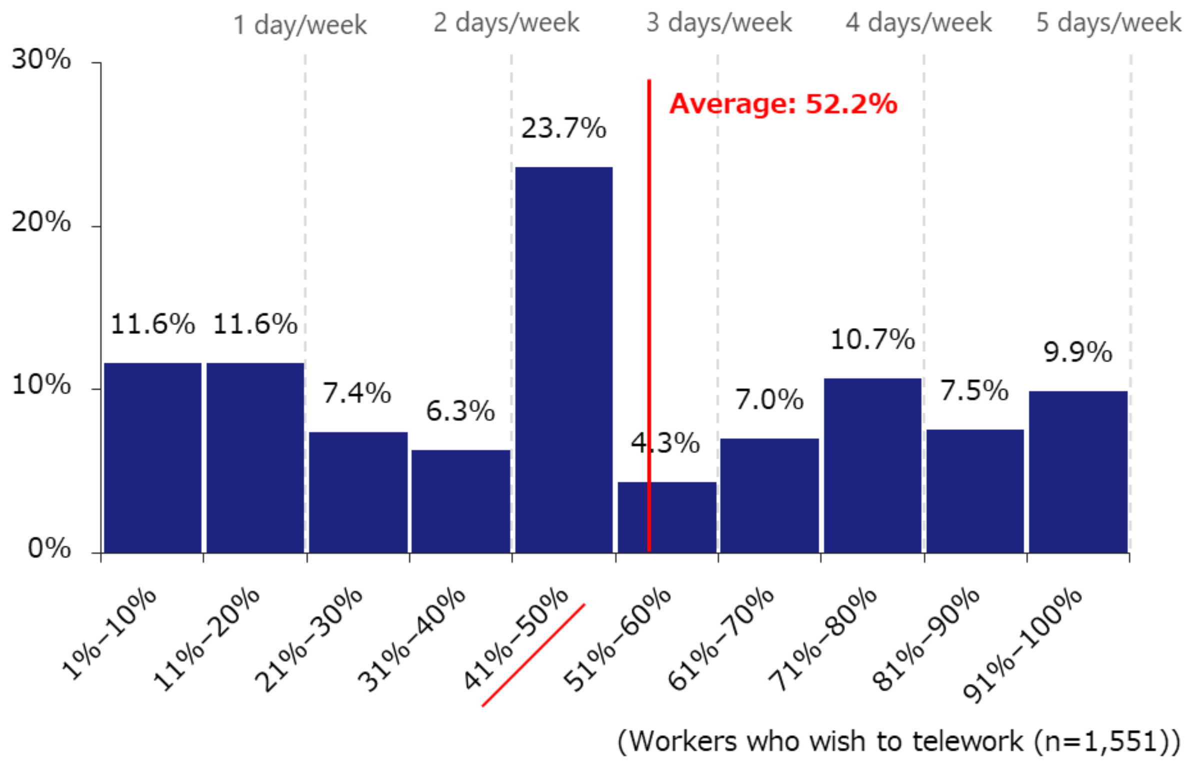
We then tallied the percentage of those who wished to use any of the three places for telework and found that the percentage of those who wished to telework even a little in the future was 75.3%, larger than the actual rate **(Figure 22)**, suggesting that a further proliferation of telework is desired despite its rapid spread.

Figure 22: Telework Needs



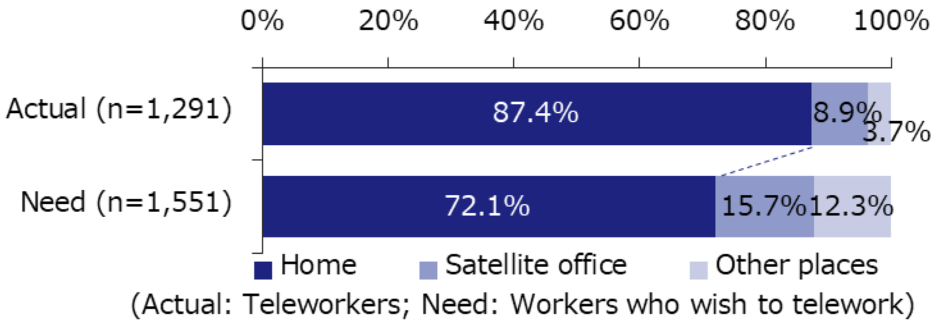
When we asked the workers who wished to telework how they wanted to split their time between working in the office and teleworking, we found that the average ideal percentage of time spent teleworking over a week was 52.2% **(Figure 23)**. Although this percentage is similar to the actual percentage of 53.8% (**Figure 10**), when we look at the distribution, the ratio chosen by the largest percentage of workers (23.7%) was "41%–50%." While the actual percentages are polarized to "1%–10%" and "91%–100%," many workers seem to be wishing to ideally telework two or three days in a five-day working week. Furthermore, since the percentage of workers who wish to telework (almost) entirely ("91%–100%") was only around 10% (9.9%), the need for offices as a place to work is likely to remain even if telework spread further.

Figure 23: Ideal Telework Ratio of Those Who Wish to Telework



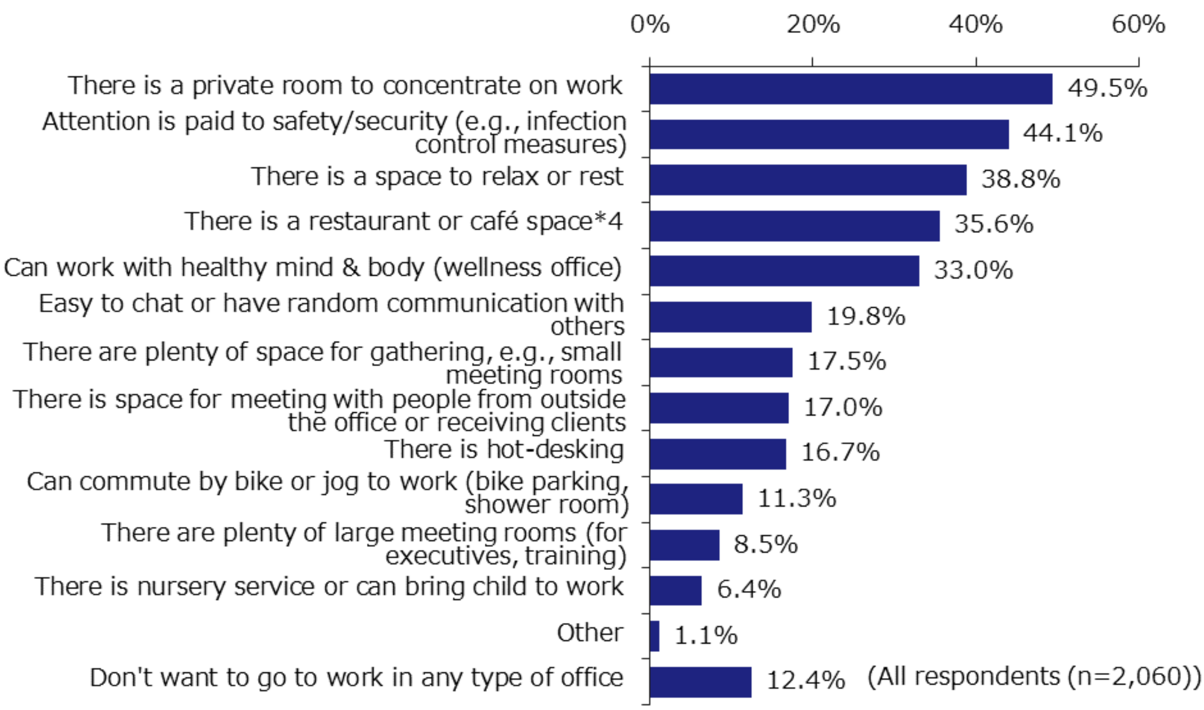
We also asked workers who wished to telework in the future how they want to split their telework time among "home," "satellite office" and "other places." While the percentage of time spent working from home, which was 87.4% in reality, decreased to 72.1% in the needs, workers' needs for time spent working in satellite offices and other places were larger than the actual percentage **(Figure 24)**. Also, since the need is larger than the implementation rate in the three measures related to the place for telework, as shown in **Figure 21**, we assume that workers wish to have the freedom of choosing from multiple workplaces.

Figure 24: Allocation of Time between Places for Telework



As we have seen thus far, many workers are likely to go to the office to work in addition to teleworking after the pandemic has abated. We asked respondents what kind of office they want to go and work in, based on the assumption that there was also a telework option. The most popular type of office chosen by nearly half of the respondents (49.5%) was one that had a private room where they could concentrate on work **(Figure 25)**. Since around half of office workers' work involve concentrating alone (**Figure 15**), workers seem to require a place to concentrate in an office. The top answer is followed by "Attention is paid to safety/security (e.g., infection control measures)" (44.1%), "There is a space to relax or rest" (38.8%), "There is a restaurant or café space" (35.6%), and "Can work with healthy mind & body (wellness office)" (33.0%).

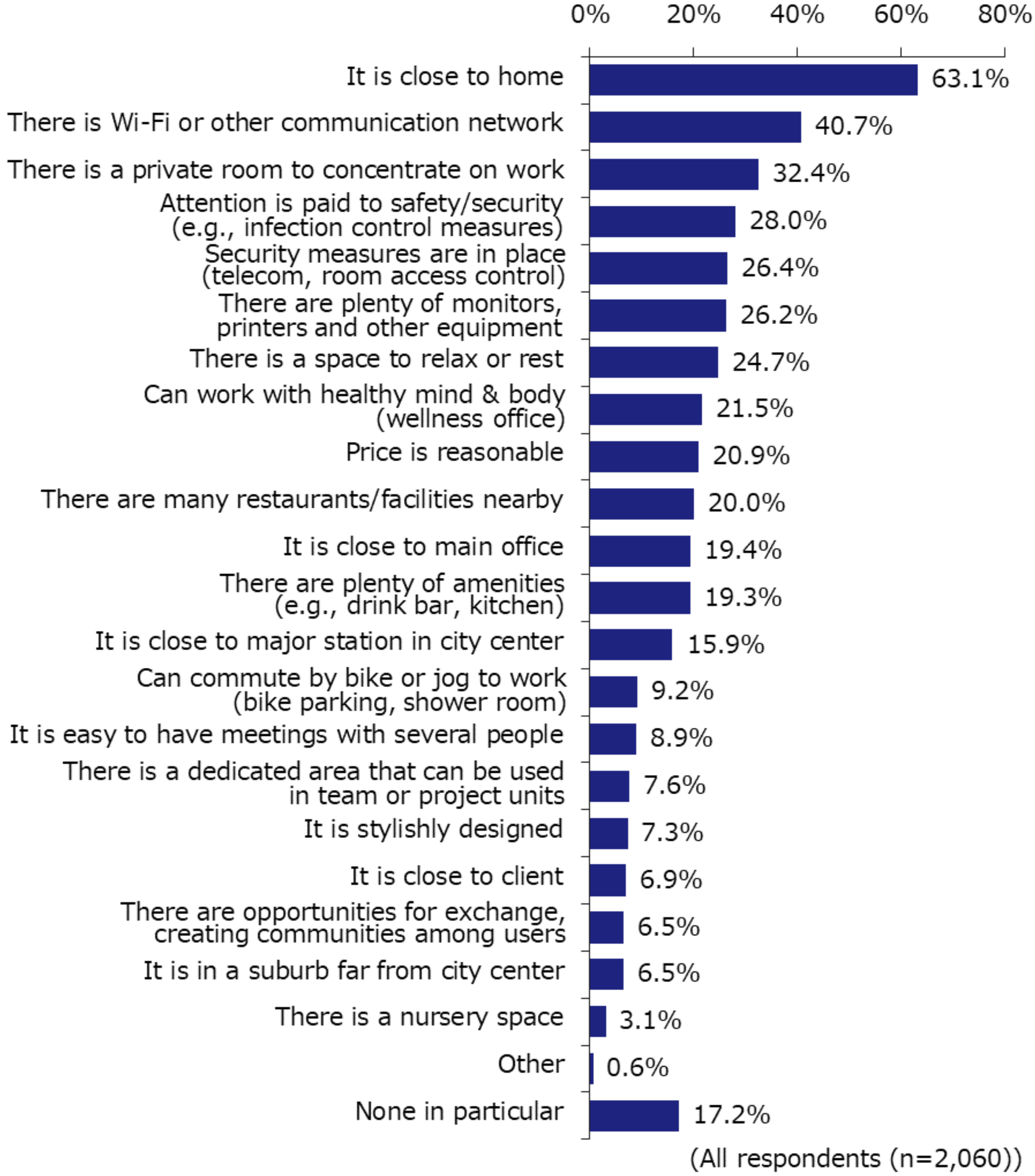
Figure 25: Features of Offices Workers Want to Go to Work in



*4 Can also be used as a casual meeting room or a place to relax.

Meanwhile, we also asked the respondents what features they placed importance on when assuming they will use a satellite office after the pandemic has abated. The most important feature was that the satellite office was "close to home" (63.1%), which far outweighed the second most important feature **(Figure 26)**. As we confirmed in **Figures 12 and 14**, the reduction of commuting and travel time appears to be a major benefit for workers in telework. As in the features required in an office, "There is a private room to concentrate on work" (32.4%) ranked third. Workers expect a diverse range of features in a satellite office.

Figure 26: Important Features when Using a Satellite Office



Amid the rising attention to satellite offices, we asked the respondents what kind of satellite office they want to use after the pandemic has abated by presenting five major types of satellite offices and asking how much they were interested in each of them.

1. Close to home: Concentrated solo-work type • It is within walking/biking distance from home, which **reduces commute time**. • There is a **private room for one person that is suitable for intensive work** and where phone calls and online meetings are also possible. • There are multifunctional copiers and lounge space, etc., enabling users to engage in a full day of work. • There are features that support a **better balance with your private life**, such as nursery services and being located within buildings where shopping can be done such as shopping malls.	NO IMAGE
2. Efficient travel: City-center touch-down type • Multiple offices are provided in **major city-center office areas**. • They are used mainly by sales representatives who drop in between client visits or on days when they go directly to their clients and return home directly, enabling a **reduction of travel time**. • Users can choose whichever location of office that suits them on that day and drop in even for a short time. • There are **private rooms and booths** suitable for individual work, as well as **soundproof booths** for phone calls and online meetings.	NO IMAGE
3. Any duration at any location: Project base type • There are **exclusive sections**, which are suitable for system development or fixed-term projects. • It can be **located where it is convenient for the project**, such as where it is easy for project members to commute to or near the client. • There are private rooms or meeting space suitable for working or holding meetings with multiple persons. • It is easy to **work with people** not only within the company but also **from outside the company**.	NO IMAGE

4. Encounters and stimulation: City-center collaboration type

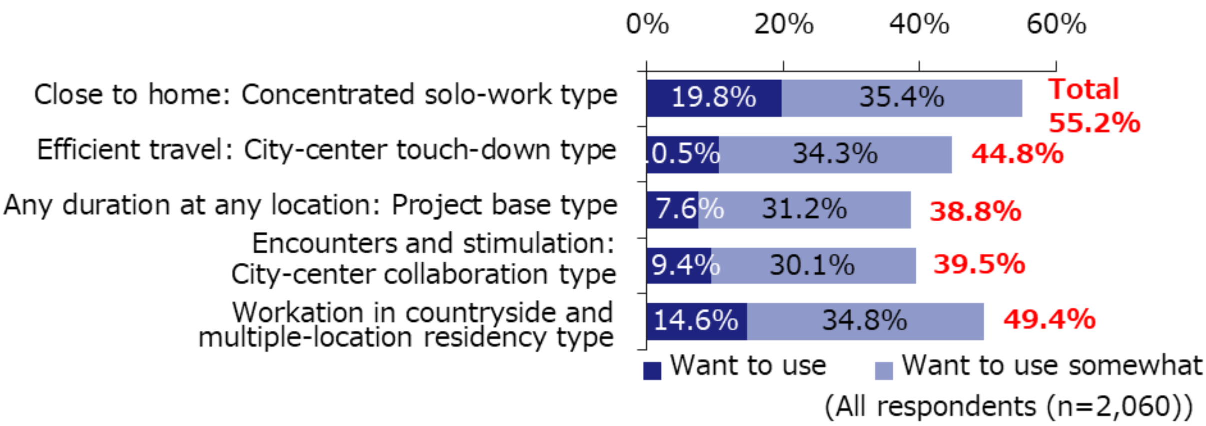
- It is located in **areas with brand value or character**, mainly in city centers (e.g., IT companies in Shibuya, financial companies in Marunouchi)
- It is shared by people from various industries and professions, offering opportunities for **collaboration or innovation**.
- It features open spaces with attention to comfort and design.
- It also offers plenty of **intangible services**, such as food and drink, events, and community-building opportunities.

5. Workation in countryside and multiple-location residency type

- Located in the lush countryside, it enables **work-life balance**.
- You can **work close to home**, as it enables you to work for companies in urban centers while living in the countryside either temporarily or for the long-term.
- It can be shared by multiple companies, which offers opportunities for **cross-industry exchanges and exchanges with the local community**.

As a result, the most desired type of satellite office was the "Close to home: Concentrated solo-work type," which was chosen by more than half of the workers **(Figure 27)**. This was followed by the "Workation in countryside and multiple-location residency type," which was chosen by nearly half of the workers. There was a certain level of demand in all types of satellite offices.

Figure 27: Interest in Different Types of Satellite Offices



5. Summary

In this report, we examined how the work styles of office workers in Greater Tokyo have changed due to the COVID-19 pandemic and considered their work styles going forward by examining their needs.

First of all, the implementation rate of work style measures had increased in all measures compared to the 2019 survey. The rise was especially significant in measures related to places for telework, as a result of the pandemic. We found that around 60% of the respondents were teleworkers. The survey results also revealed that while teleworkers teleworked for an average of 53.8% of their time over one week, a distribution breakdown showed that the ratios were polarized into "1%–10%" and "91%–100%," and that working from home was the major form of telework under the pandemic.

Even under these work styles, more than half of the workers did not feel any change in their work motivation or stress compared to before the pandemic. On the other hand, those who did feel a change were affected by concerns toward their company's performance, the overall economy and infection, as well as by the aforementioned changes in work styles. We intend to continue analyzing the relationship between changes in work content and workload due to telework and changes in motivation and stress.

Despite spreading rapidly as a result of the pandemic, telework is expected to see further expansion due in part to the large needs of workers. In terms of the allocation of workers' time to telework and working in the office, we found that many workers wished to telework for two or three days a week, instead of the more drastic distribution of time that is currently witnessed. We also identified workers' needs for choosing a place to work from among multiple choices such as satellite offices, in addition to their homes.

Although not a few workers wish to go to the office every day as in before the pandemic, many workers also wish to telework every day. Therefore, offices are expected remain worthwhile as a place to work. However, if workers begin to work in various places, including the home and satellite offices, the significance of each place will be called into question. Conventional office strategies were based on the assumption that workers commute to the same office every day. Companies had control over workers' work styles and workers followed. Going forward, companies will be required to provide an environment that enable workers to choose where they can work in comfort as well as the balance between multiple work styles, such as working in the office and telework, and from among multiple telework places. Xymax Real Estate Institute will continue to conduct company surveys and worker surveys in parallel to capture such changes in the trend of work styles and workplaces.

Survey Overview

Survey period: September 2020; Area: Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures); Survey method: online survey

Respondents: (1) Screening: 20,000 men and women aged between 15 and 69; (2) Main survey: Valid answers were obtained from 2,060 men and women aged between 20 and 69 who replied in the screening that their profession was either an officer or staff of a company or organization, whose job category was managerial, specialized or technical, clerical or sales, whose regular office was located in Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures), and whose principal workplace was the office or home.

Attributes of Respondents

		%	n
Gender and age	Male aged 20-29	2.1%	43
	Male aged 30-39	8.3%	172
	Male aged 40-49	21.1%	434
	Male aged 50-59	26.9%	555
	Male aged 60 or older	11.0%	227
	(Male total)	69.5%	1,431
	Female aged 20-29	5.5%	113
	Female aged 30-39	9.2%	189
	Female aged 40-49	9.2%	190
	Female aged 50-59	5.5%	114
	Female aged 60 or older	1.1%	23
	(Female total)	30.5%	629
Job category	Sales	22.7%	468
	Technical specialist	20.3%	418
	General office work/reception/secretary	20.2%	417
	Admin/HR/accounting	15.9%	328
	Corporate planning	10.9%	225
	Clerical specialist	2.2%	45
	Creative specialist	2.1%	43
	Other	5.6%	116
Form of employ-ment	Officer of company/organization	9.3%	192
	Staff of company/organization (management)	26.6%	548
	Staff of company/organization (Regular staff other than management)	50.4%	1,038
	Staff of company/organization (Other than regular staff)	13.7%	282

		%	n
Number of employees of company	1–9	8.3%	171
	10–49	11.7%	241
	50–99	8.0%	165
	100–299	12.6%	260
	300–999	15.3%	316
	1,000–2,999	12.9%	266
	3,000 or more	28.5%	588
	Don't know	2.6%	53
Industry	Manufacturing	21.5%	442
	Telecommunications	15.5%	320
	Service (those not classifed as other sectors)	10.9%	224
	Finance & insurance	10.8%	222
	Wholesale & retail	10.1%	209
	Construction	5.5%	113
	Real estate & lease of goods	5.1%	106
	Other & unclassifiable industries	3.9%	80
	Academic research & professional or technical service	3.6%	74
	Transportation & postal service	3.6%	74
	Medical & welfare	2.1%	44
	Education & learning support	2.0%	41
	Daily life services & entertainment	1.5%	31
	Electricity, gas, heat, water supply	1.4%	29
	Civil service (excl. those classified as other sectors)	1.0%	21
	Multi-service business	0.9%	18
	Accommodation & restaurant	0.5%	11
	Agriculture & forestry	0.0%	1

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

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