Companies' Workplace Strategies Identified Following the COVID-19 Pandemic

Companies in Greater Tokyo Classified into Five Types Through Clustering

December 1, 2021

As many companies were more or less required to switch to teleworking due to the COVID-19 pandemic, it seemed that a decentralized work style, which had been aspired to in the work style reforms since before the pandemic, was finally going to take root among Japanese companies. After nearly two years from the start of the pandemic, however, differences between companies concerning the spread of the new work style are becoming apparent.

Against this background, we conducted a clustering*1 of companies that responded to the Greater Tokyo Company Survey which we carried out in July 2021*2 using response data for nine questions related to work styles and the workplace. As a result, the companies were grouped into five graded clusters, ranging from a group of companies that are already shifting to a decentralized work style to a group of companies that are expected to return to the previous work style after the pandemic.

*1 Clustering: A method of creating clusters by grouping similar objects according to the similarity or non-similarity between data or clusters.

*2 *Greater Tokyo Company Survey on Work Styles and the Workplace* | *July 2021*, released on August 13, 2021 (in Japanese only)
https://soken.xymax.co.jp/2021/08/13/2108-greatertokyo_workstyle_survey_2107/

In this report, we compared the five clusters' characteristics regarding work styles and the workplace and examined the current state in which a mixture of companies with various characteristics exists. Based on this examination, we forecasted the direction of the workplace after the pandemic, with the aim of presenting it as an indicator for the future. In particular, we hope that this report will encourage the intermediate group of companies (③ **Potential Advocate**), which maintain a wait-and-see stance on the back of the ongoing pandemic, to evolve their workplace strategies instead of returning to the previous work style after the pandemic has ended.

Summary: Major characteristics of the five company types

① Advocate

Basic attribute: Large proportion of large companies and manufacturing sector

Companies that have actively promoted telework since before the COVID-19 pandemic with the aim of decentralizing workplaces and providing an environment where employees can work autonomously. Has the smallest office space per user* among the five types and the strongest intention to downsize the main office.

② Wellness-focused

Basic attribute: Large proportion of large companies and information & communications sector

Companies with high interest in employee satisfaction and well-being; views telework more as a benefit. Has the second smallest office space per user* among the five types. Also has strong intentions to improve the environment of the main office while promoting telework, with an inclination toward a hybrid work style that combines telework and coming to the

office.

③ Potential Advocate

Basic attribute: Large proportion of SMEs and information & communications sector

Companies currently with a low degree of telework and slow in changes in workplace strategies but with future intentions to promote de-centralized work styles. In particular, all companies wish to introduce satellite offices, which none of them have currently introduced, after the pandemic. Has the second strongest intention to downsize the main office.

④ Skeptic

Basic attribute: Large proportion of SMEs and wholesale and retail trade sector

Companies that have introduced work-from-home in response to the pandemic but are cautious about providing alternative workplaces. Although they will continue to accept work-from-home after the pandemic has ended, they are more inclined to centralize their offices in central Tokyo than introducing a decentralized work style.

⑤ Returner

Basic attribute: Large proportion of construction sector

Companies that place more importance on having their employees come to the office than teleworking and have strong intentions to return to the office after the pandemic. They have a strong awareness toward cost reduction. They have the largest office space per user* among the five types as well as the strongest intention to expand their main office going forward.

*User: Employees who are eligible to use the office though may not be using it every day

1. Details of Clustering

In Chapter 1, we look at the results of each cluster regarding the nine questions used for clustering. The outline of the analysis is as follows.

Analysis method	Clustering using Ward's method*3 *3 Ward's method: Defines the distance between clusters by the increment of within-cluster variance when they are merged. Clusters are merged in ascending order of cluster distance. It is a type of hierarchical clustering.
Analysis targets	651 companies that offered valid responses to the nine questions used for clustering (See end of report for the survey overview)
Questions used for clustering (See end of report for details including the options of answers)	・Introduction of work-from-home policy ・Future intention toward introducing work-from-home policy ・Introduction of satellite offices ・Future intention toward introducing satellite offices ・Intentions after the pandemic: Theme to focus on going forward ・Intentions after the pandemic: Location of head office functions ・Intentions after the pandemic: Location of workplace other than for head office functions ・Intentions after the pandemic: Strategy for the main office interested in ・Intentions after the pandemic: Office space

Based on the characteristics of the five clusters, we named the types of companies as follows: ① **Advocate**, ② **Wellness-focused**, ③ **Potential Advocate**, ④ **Skeptic** and ⑤ **Returner**. The percentage of each type is as shown in **Figure 1**.

Figure 1: Percentages of the Five Types

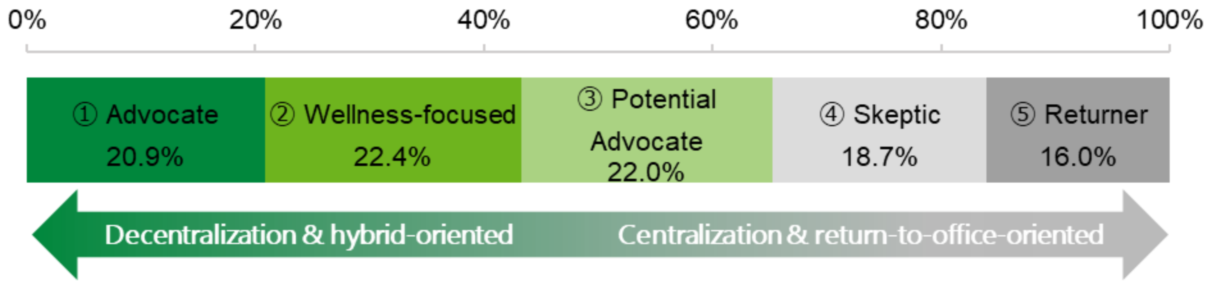


Figure 2 is a summary of the nine questions that were used for the clustering. This reveals that companies closer to ① **Advocate** tend to be more aggressive in introducing a decentralized work style. ① **Advocate**–③ **Potential Advocate** tend to be oriented toward a decentralized or hybrid (i.e., combined use of telework and coming to the office) work style, while the ④ **Skeptic** and ⑤ **Returner** tend to be oriented toward a centralized work style or returning to the office. We can also see that ① and ②, which share a decentralized/hybrid orientation, intend to focus on different themes: "Promote DX" and "Employee satisfaction & well-being," respectively, suggesting that the five types also have different characteristics in terms of the values and views behind their initiatives.

Figure 2: Result of Questions Used for Clustering
(Details Are Provided in the Figures Stated below the Questions)

		① Advocate (n=136)	② Wellness-focused (n=146)	③ Potential Advocate (n=143)	④ Skeptic (n=122)	⑤ Returner (n=104)
	Work-from-home introduction rate Current ➡ Future intention **[Figures. 5, 14]**	100% ➡ 100%	97.3% ➡ 100%	88.8% ➡ 100%	93.4% ➡ 100%	57.6% ➡ 1.0%
	Satellite office introduction rate Current ➡ Future intention **[Figures 6, 15]**	100% ➡ 100%	100% ➡ 100%	0% ➡ 100%	7.5% ➡ 0%	9.6% ➡ 15.4%
Intentions for after the COVID-19 pandemic	**Theme to focus on*** **Top theme** **[Figure 10]**	Promote DX 45.6%	Employee satisfaction & well-being 49.3%	Promote DX 44.8%	Employee satisfaction & well-being 41.8%	Strengthen financial base (e.g., cost reduction) 35.6%
Intentions for after the COVID-19 pandemic	**Location of head office functions** "Central Tokyo" "Suburb or provinces"	Central Tokyo: 64.7% Suburb or provinces: 5.9%	Central Tokyo: 61.0% Suburb or provinces: 2.3%	Central Tokyo: 72.7% Suburb or provinces: 9.1%	Central Tokyo: 79.5% Suburb or provinces: 3.3%	Central Tokyo: 77.9% Suburb or provinces: 5.8%
Intentions for after the COVID-19 pandemic	**Location of workplace for other than head office function*** "Suburb" **[Figure 16]**	67.6%	60.3%	54.5%	30.3%	8.7%
Intentions for after the COVID-19 pandemic	**Strategy for main office interested in*** **Top reply** **[Figure 17]**	Place emphasis on creating a place for communication and functions for congregating 60.3%	Place emphasis on creating a place for communication and functions for congregating 60.3%	Place emphasis on creating a place for communication and functions for congregating 55.9%	Place emphasis on creating a place for communication and functions for congregating 35.2%	Maintain status quo 51.0%
Intentions for after the COVID-19 pandemic	**Office space** "Want to downsize" "Want to expand" **[Figure 18]**	Downsize: 41.9% Expand: 2.9%	Downsize: 26.7% Expand: 7.5%	Downsize: 35.7% Expand: 7.7%	Downsize: 24.6% Expand: 1.6%	Downsize: 5.8% Expand: 10.6%

*Multiple answer

It should be noted that the survey data analyzed in this report include data of companies subscribing to ZXY, a satellite office service for corporations, which indicates that telework may be introduced to a greater degree than the population (all companies in Japan). Furthermore, the above percentages are likely to change going forward due to rapid changes in companies' policies as the pandemic heads toward an end.

2. Characteristics of the Five Company Types

In Chapter 2, we look at the basic attributes of the five company types that were statistically classified and the trend of responses to work style-related questions that were not used for clustering. We also look deeper into the results of the nine questions of **Figure 2** as needed to identify the characteristics of each company type.

2.1. Basic Attributes and Actual State of Work Styles and the Workplace

Figure 3 shows the basic attributes of each type. Each type has different characteristics in terms of company attributes: large proportions of **① Advocate** and **② Wellness-focused** tend to be large companies, those of **③ Potential Advocate** SMEs, those of **④ Skeptic** wholesale and retail trade companies, and those of **⑤ Returner** construction companies. The office space per user tends to be smaller among the type of companies that are active toward introducing a decentralized work style.

Figure 3: Basic Attributes

(1 tsubo = approx. 3.3 sqm)

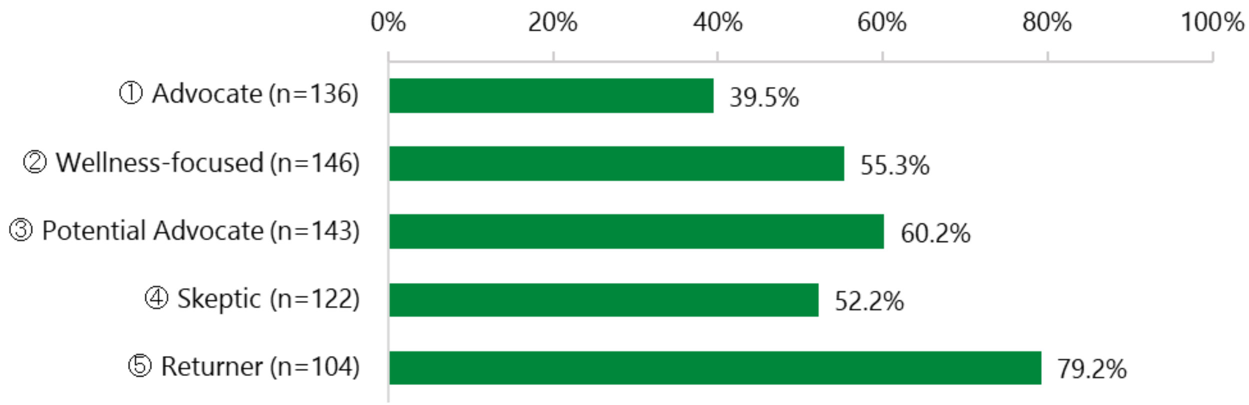
Type	n	%	No. of employees (Average)	No. of users in target office* (Average)	Target office* space (Average)	Office space per user (median value)	Sector characteristic
① Advocate	136	20.9%	4,033	1,126	1,324 tsubo	2.0 tsubo	Manufacturing
② Wellness-focused	146	22.4%	3,488	405	1,637 tsubo	2.3 tsubo	Info & comm.
③ Potential Advocate	143	22.0%	756	134	435 tsubo	2.9 tsubo	Info & comm.
④ Skeptic	122	18.7%	614	162	325 tsubo	3.4 tsubo	Wholesale & retail
⑤ Returner	104	16.0%	1,379	133	353 tsubo	3.3 tsubo	Construction
Total	651	100.0%	2,126	395	810 tsubo	2.8 tsubo	-

*Target offices are offices to which respondents of the survey belong.

We then look at the actual state of work styles and the workplace amid the pandemic. Below, **Figure 4** shows the current percentage of employees coming to the office, **Figure 5** the rate of introduction of a work-from-home policy and the percentage of users (percentage of employees who actually use the policy), and **Figure 6** the rate of introduction of satellite offices and the percentage of users (percentage of employees who actually use satellite offices), each by type of company.

As for the current percentage of employees coming to the office, ① **Advocate** was the lowest at 39.5% and ② **Wellness-focused**–④ **Skeptic** also kept it low at around 50–60% (**Figure 4**). ⑤ **Returner** had the highest percentage at 79.2%.

Figure 4: Current Percentage of Employees Coming to the Office

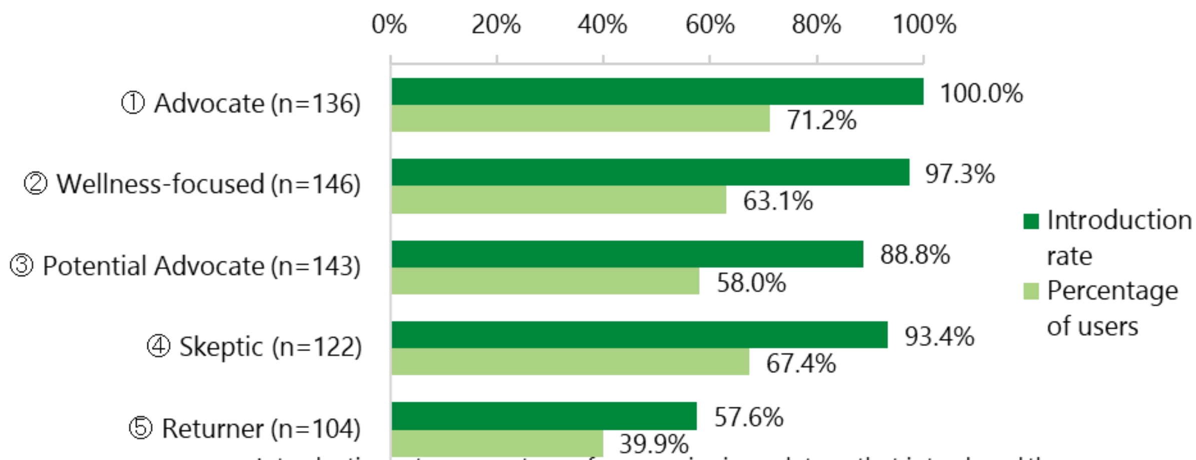


Note: Average figure within each type

We believe the reason for ①–④ to be able to keep the percentage low is, as we saw in **Figure 2**, their high rate of introduction of a work-from-home policy. ① **Advocate** has a 100% introduction rate, with all companies having introduced the policy before the pandemic. In addition, more than 80% of the companies have enhanced and expanded the policy in response to the pandemic (**Figure 5**). As for ② **Wellness-focused**–④ **Skeptic**, many companies introduced a work-from-home policy due to the pandemic, leading to a high introduction rate of currently around 90%.

The percentage of users was as much as approximately 60–70% in ①–④, indicating that a work-from-home policy has not only been introduced at those companies but is also actually being used. Meanwhile, ⑤ **Returner** had a 57.6% introduction rate and a 39.9% percentage of users. The low use of the policy has likely led to the high percentage of employees coming to the office.

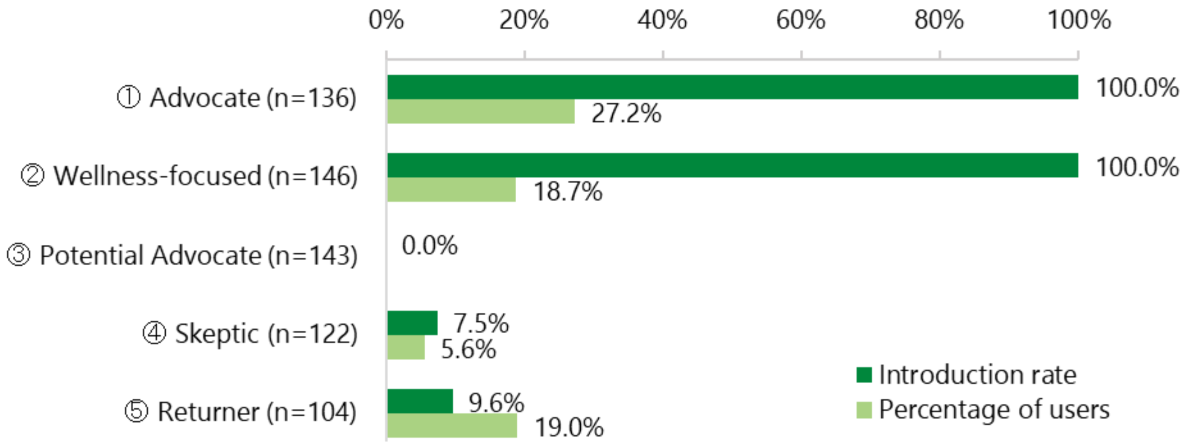
Figure 5: Introduction Rate of Work-from-home Policy (Recap) and Percentage of Users



Introduction rate: percentage of companies in each type that introduced the measure; percentage of users: average figure within each type

As for satellite offices, 80% of ① **Advocate**, who currently has an introduction rate of 100%, had introduced them before the pandemic, as had more than 50% of ② **Wellness-focused** (**Figure 6**). The introduction rate of satellite offices differed significantly between company types compared to the introduction rate of a work-from-home policy, with the rate being 0% among ③ **Potential Advocate** and a little less than 10% among ④ **Skeptic** and ⑤ **Returner**. The percentage of users was low at around 20–30% even among ① **Advocate** and ② **Wellness-focused**, indicating room for growth in companies' use of satellite offices going forward.

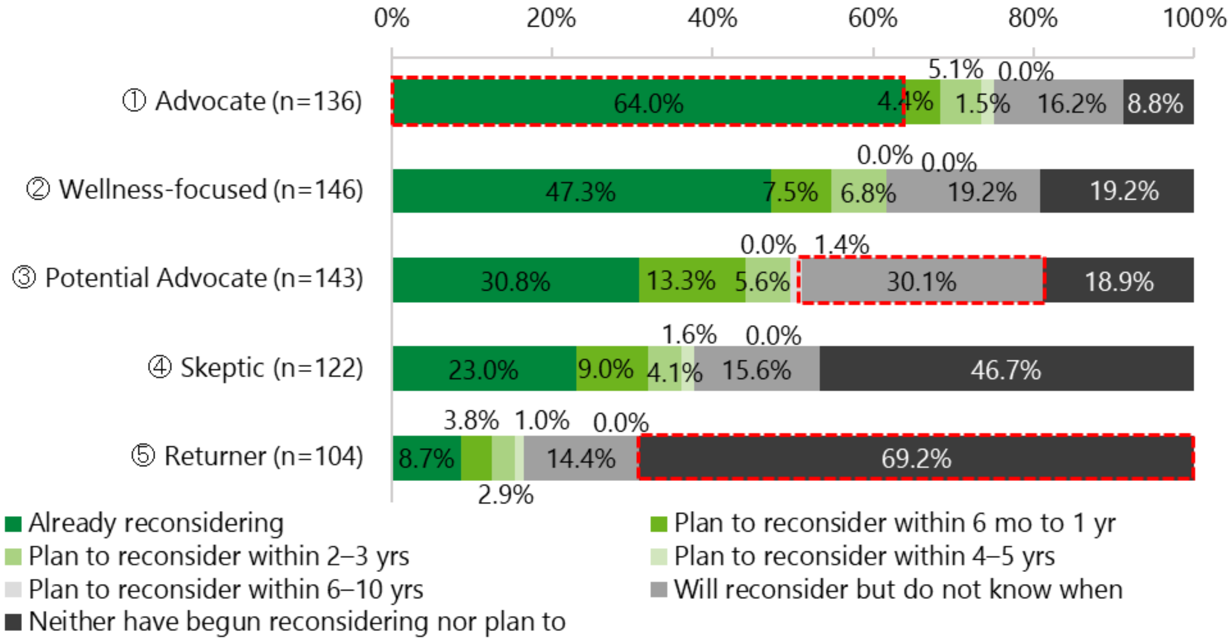
Figure 6: Introduction Rate of Satellite Offices (Recap) and Percentage of Users



Introduction rate: percentage of companies of each type that introduced the measure; percentage of users: average figure within each type

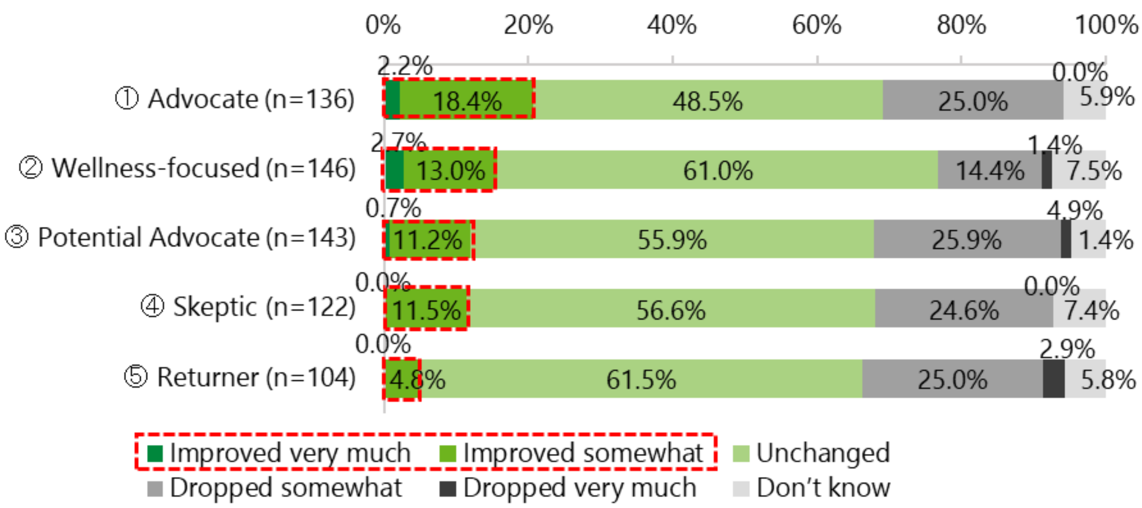
Figure 7 shows when the companies intend to begin reconsidering their comprehensive workplace strategies, including the introduction of telework mentioned above. Companies with a stronger inclination toward decentralization and a hybrid work style have begun reconsidering their strategies at an early stage, with 64.0% of ① **Advocate** "already reconsidering." Meanwhile, the top reply of ⑤ **Returner** was "Neither have begun reconsidering nor plan to" (69.2%). ③ **Potential Advocate** showed a relatively high percentage of "Will begin reconsidering at some point but do not know when" (30.1%), indicating they are likely to start reconsidering their strategies once the end of the pandemic comes into sight.

Figure 7: Timing of Reconsidering Workplace Strategies



These developments seem to affect companies' productivity. In terms of employees' performance compared to before the pandemic, company types with a stronger inclination toward decentralization and a hybrid work style tended to have a high percentage of "Improved (very much/somewhat)" (**Figure 8**). However, "Dropped (very much/somewhat)" gained a certain percentage across all company types, suggesting that companies are still in search for an effective work style on the back of the rapid changes that have occurred since the start of the pandemic.

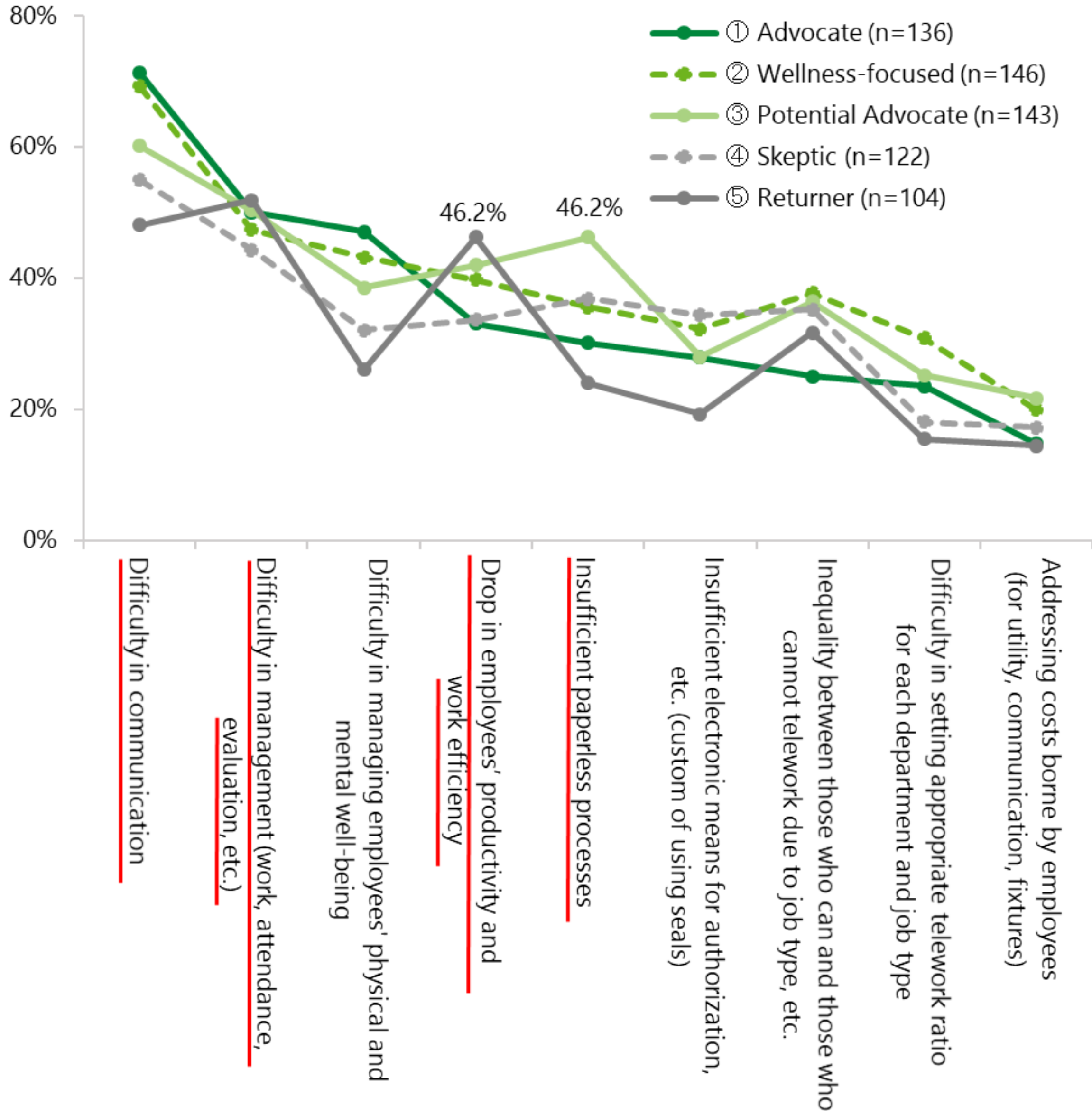
Figure 8: Employees' Performance Compared to before the Pandemic



The issues and problems companies faced in implementing telework also showed different characteristics between company types (**Figure 9**).

Overall, "Difficulty in communication" and "Difficulty in management (work, attendance, evaluation, etc.)" were popular issues. ③ **Potential Advocate**, who does not use telework as much as ① **Advocate** and ② **Wellness-focused**, had an especially high percentage of "Insufficient paperless processes" (46.2%), suggesting there is significant room for improvement going forward. ⑤ **Returner** had the highest percentage of "Drop in employees' productivity and work efficiency" (46.2%) among the five company types, which has likely led to their low telework introduction rate.

Figure 9: Issues and Problems in Implementing Telework (Multiple Answer)



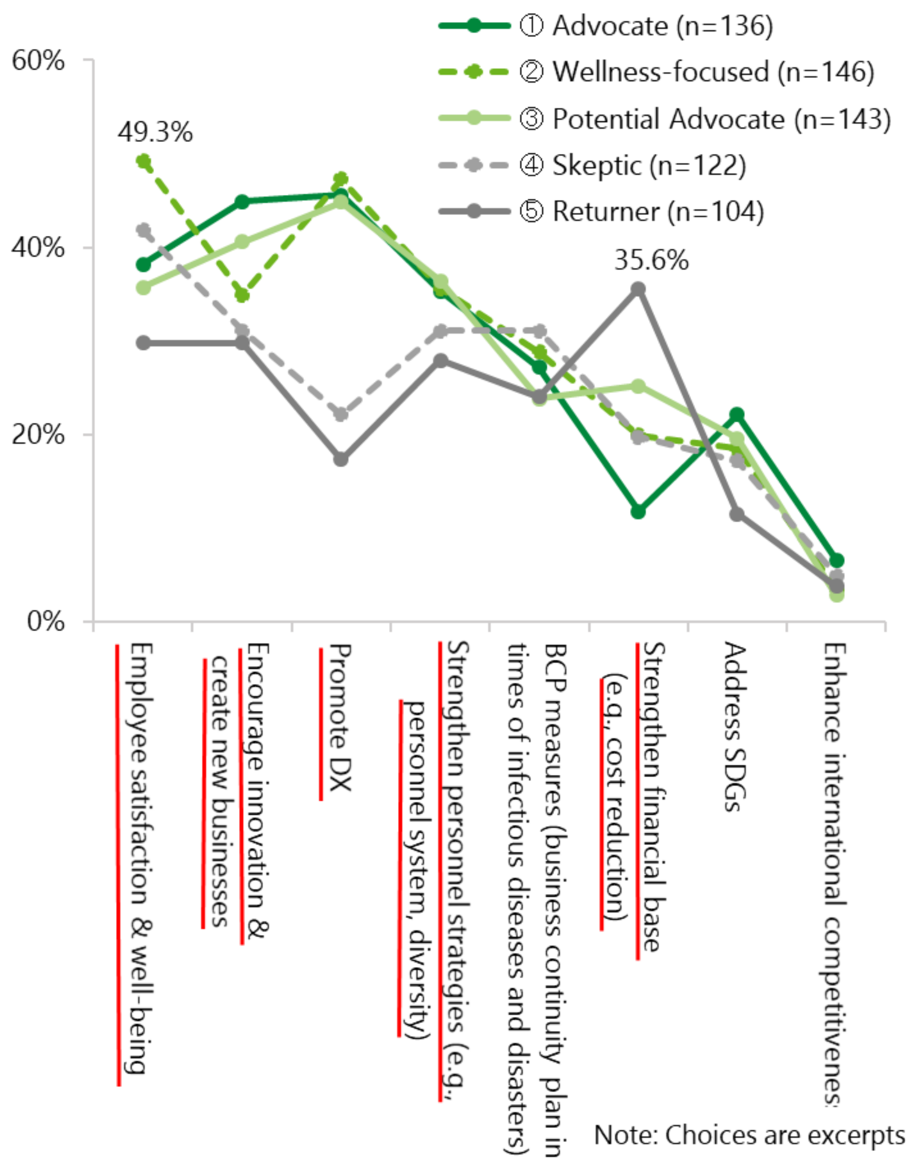
Note: Choices are excerpts

2.2. Views and Values

The difference in the current initiatives of the five company types is most likely affected by the differences in the companies' views and values.

For example, an in-depth examination of the themes ranking second and below of the "Theme to focus on for after the pandemic" in **Figure 2** indicates that "Promote DX," "Encourage innovation & create new businesses" and "Strengthen personnel strategies (e.g., diversity)" were popular among **① Advocate–③ Potential Advocate**, who are oriented toward decentralization and a hybrid work style, suggesting an awareness toward long-term enhancement of corporate competitiveness (**Figure 10**). **② Wellness-focused** had the highest percentage of "Employee satisfaction & well-being" (49.3%) among the five types. This may have led to their adoption of telework as well as to an emphasis on coming to the office, which we will discuss later. "Strengthen financial base (e.g., cost reduction)" (35.6%) stood out among **⑤ Returner**, implying that cost awareness may have led to their unwillingness to reform work styles.

Figure 10: Theme to Focus on for after the Pandemic (Multiple Answer) (Recap)

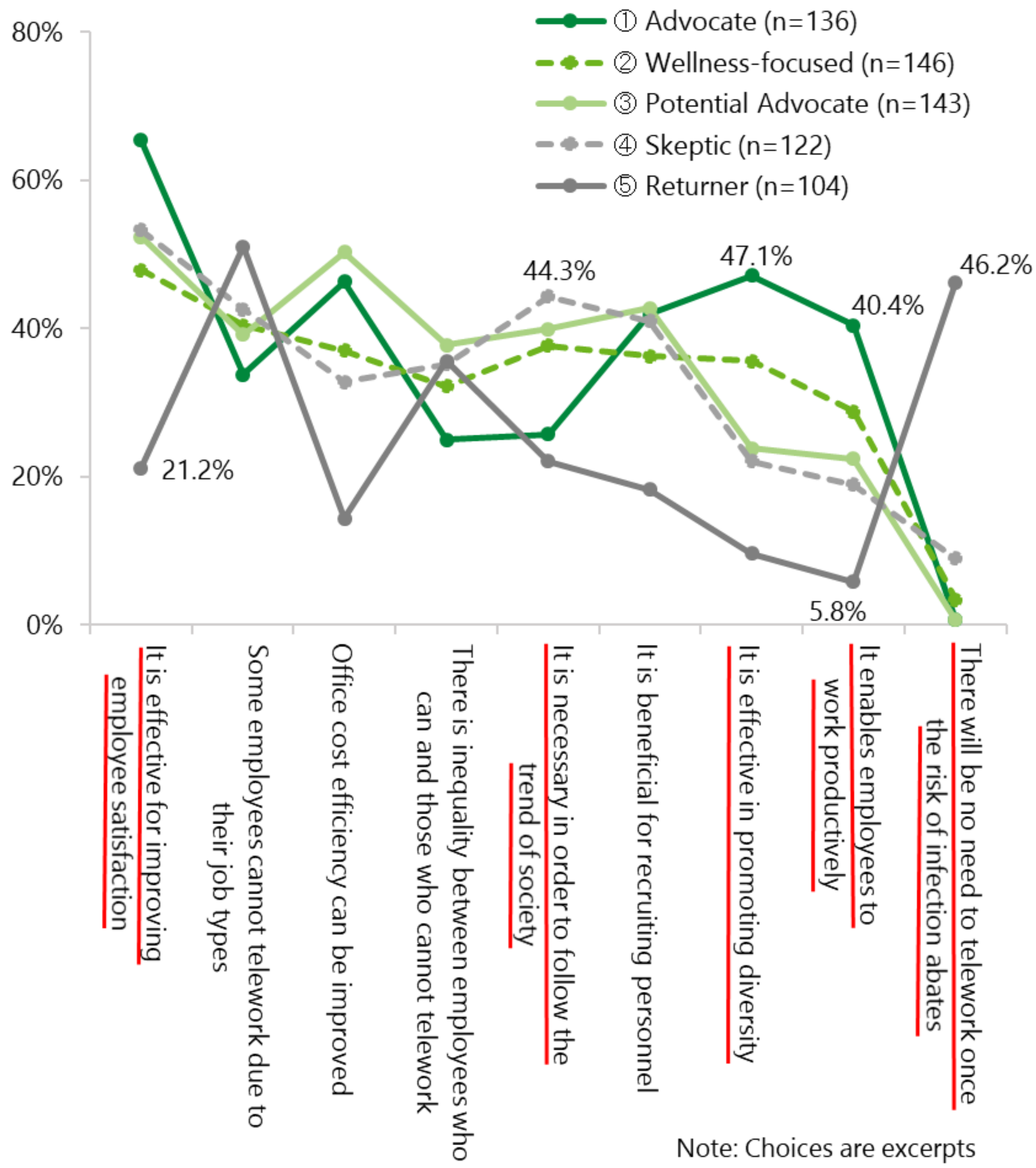


Note: Choices are excerpts

As for companies' views toward telework, "It is effective for improving employee satisfaction" and "It is beneficial for recruiting personnel" were popular among ① **Advocate**–④ **Skeptic**, indicating that those companies consider the use of telework beneficial to a certain degree. On the other hand, less than 10% of the companies of those types chose "There will be no need to telework once the risk of infection abates" (**Figure 11**). In particular, ① **Advocate** had high percentages of "It is effective in promoting diversity" (47.1%) and "It enables employees to work productively" (40.4%), indicating that they value telework as more than a means of employee benefit.

On the other hand, "It is necessary in order to follow the trend of society" (44.3%) was popular among ④ **Skeptic**, along with improving employee satisfaction. 46.2% of ⑤ **Returner** thought "There will be no need to telework once the risk of infection abates." This may have been affected by the fact that this type does not value "It is effective for improving employee satisfaction" (21.2%) and "It enables employees to work productively" (5.8%) as much as other types.

Figure 11: Views toward Telework (Multiple Answer)



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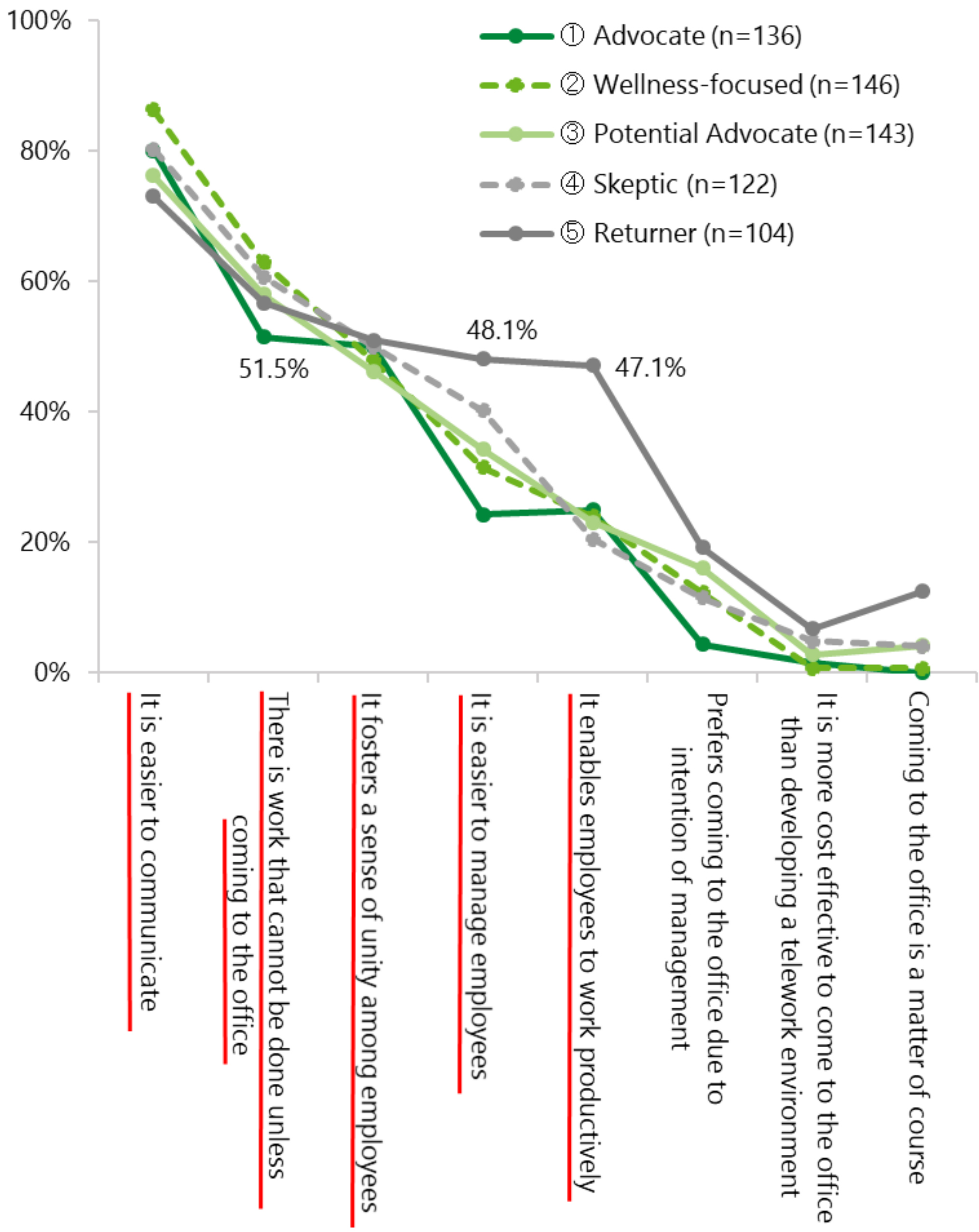
In terms of the views toward coming to the office, ⑤ **Returner** was also more positive about coming to the office than other types, as is evident in the popularity of "It enables employees to work productively" (47.1%) and "It is easier to manage employees" (48.1%) (**Figure 12**). ① **Advocate–**③ **Potential Advocate**, who are oriented toward decentralization and a hybrid work style, also appreciated the unique values of the office, such as "It is easier to communicate" and "It fosters a sense of unity among employees." Furthermore, 51.5% of ① **Advocate**, who highly values the advantages of teleworking as shown in **Figure 11**, chose "There is work that can only be done at the office," suggesting that the office will continue to be needed going forward.

Figure 12: Views toward Coming to the Office (Multiple Answer)



Note: Choices are excerpts

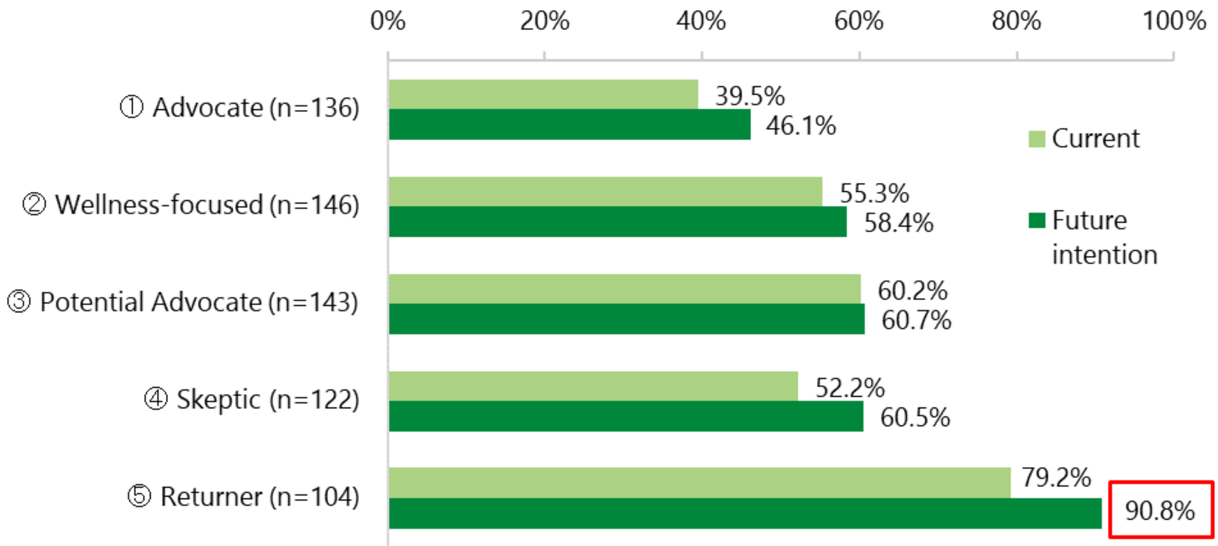
3. Direction after the Pandemic

In Chapter 2, we identified the characteristics of each company type in terms of their current initiatives and views under the pandemic. In Chapter 3, we compare the future intentions of each company type to forecast the direction of work styles and the workplace of Japanese companies after the pandemic.

3.1. Intentions toward a Hybrid Work Style

We will first compare companies' future intentions toward the percentage of employees coming to the office and the current percentages, which we examined in Chapter 2, as an indicator of the direction of work styles and the workplace. As shown in **Figure 13**, none of the types intend a significant change from the current percentages of employees coming to the office. ① **Advocate–④ Skeptic** intend to limit the percentage to around 40–60% even after the pandemic. On the other hand, ⑤ **Returner** plans to return to a work style of mainly coming to the office (90.8%).

Figure 13: Percentage of Employees Coming to the Office (Current & Future Intention)



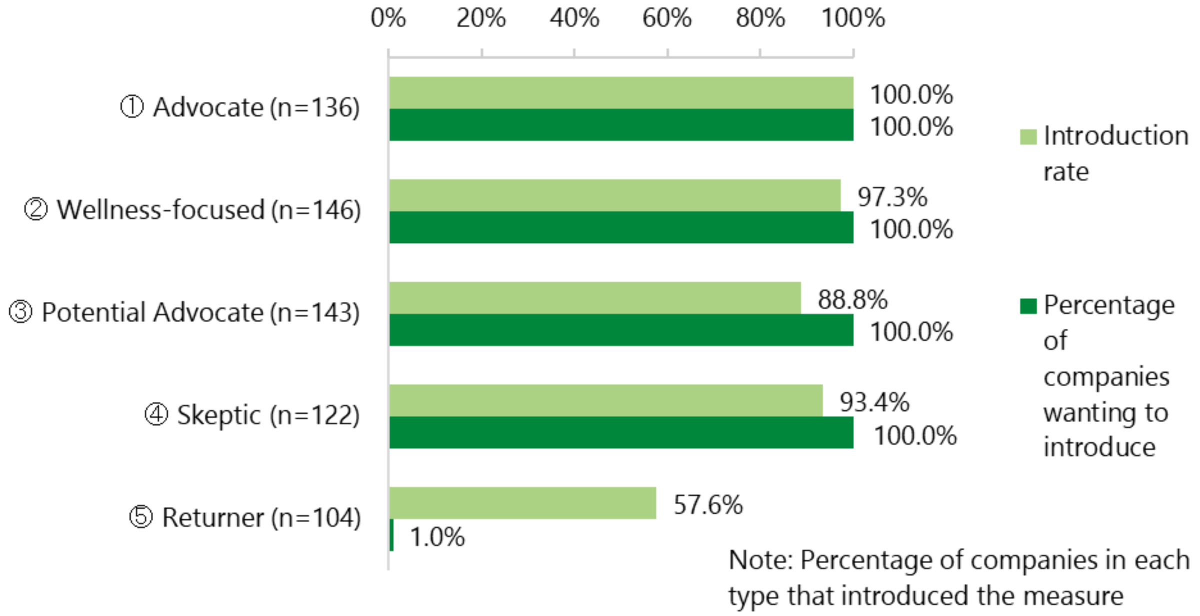
Note: Average figure within each type

That ① **Advocate–④ Skeptic** intend to keep the percentage low means that they intend to continue to adopt telework after the pandemic. Here, we will re-examine companies' intentions to introduce a work-from-home policy and satellite offices, which were shown in **Figure 2**.

We asked companies to choose either "Want to introduce/continue (somewhat)" or "Do not want to introduce/continue (somewhat)" as their future intention toward a work-from-home policy and satellite offices. We call the percentage of "Want to introduce/continue (somewhat)" the percentage of companies wanting to introduce the measure.

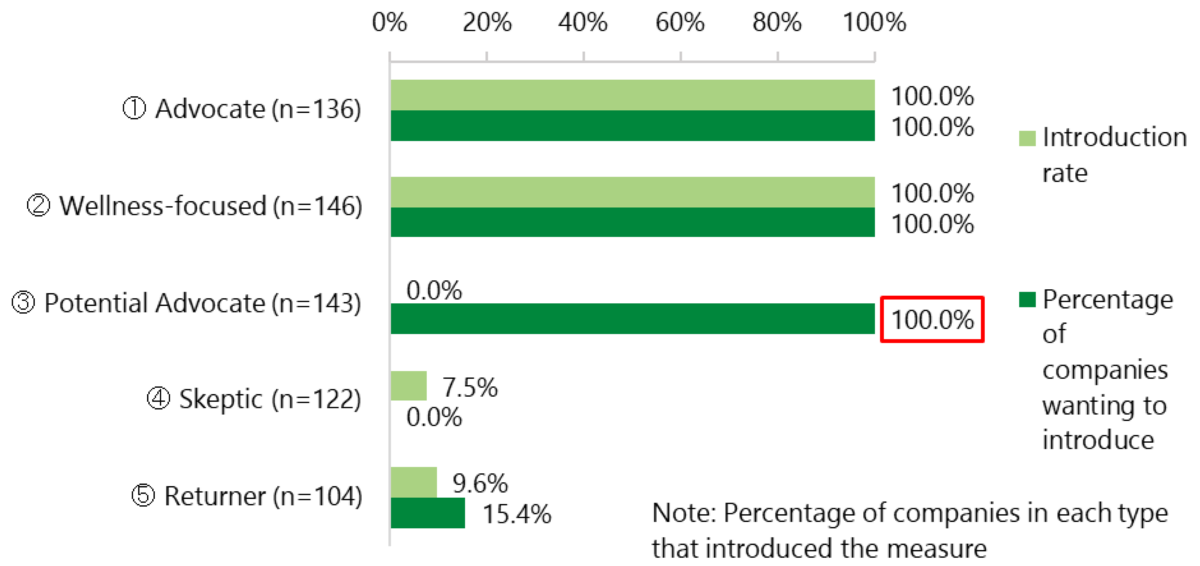
With regard to the work-from-home policy, although 57.6% of ⑤ **Returner** has introduced the policy, many companies intend to abolish it, with only 1.0% of the companies wanting to continue it (**Figure 14**). On the other hand, 100% of ① **Advocate** has already introduced it as well as want to introduce it, and 100% of ② **Wellness-focused–④ Skeptic** want to introduce it, which lead us to expect the work-from-home policy to continue to be adopted extensively after the pandemic.

Figure 14: Current Introduction Rate of and Percentage of Companies Wanting to Introduce a Work-from-home Policy (Recap)



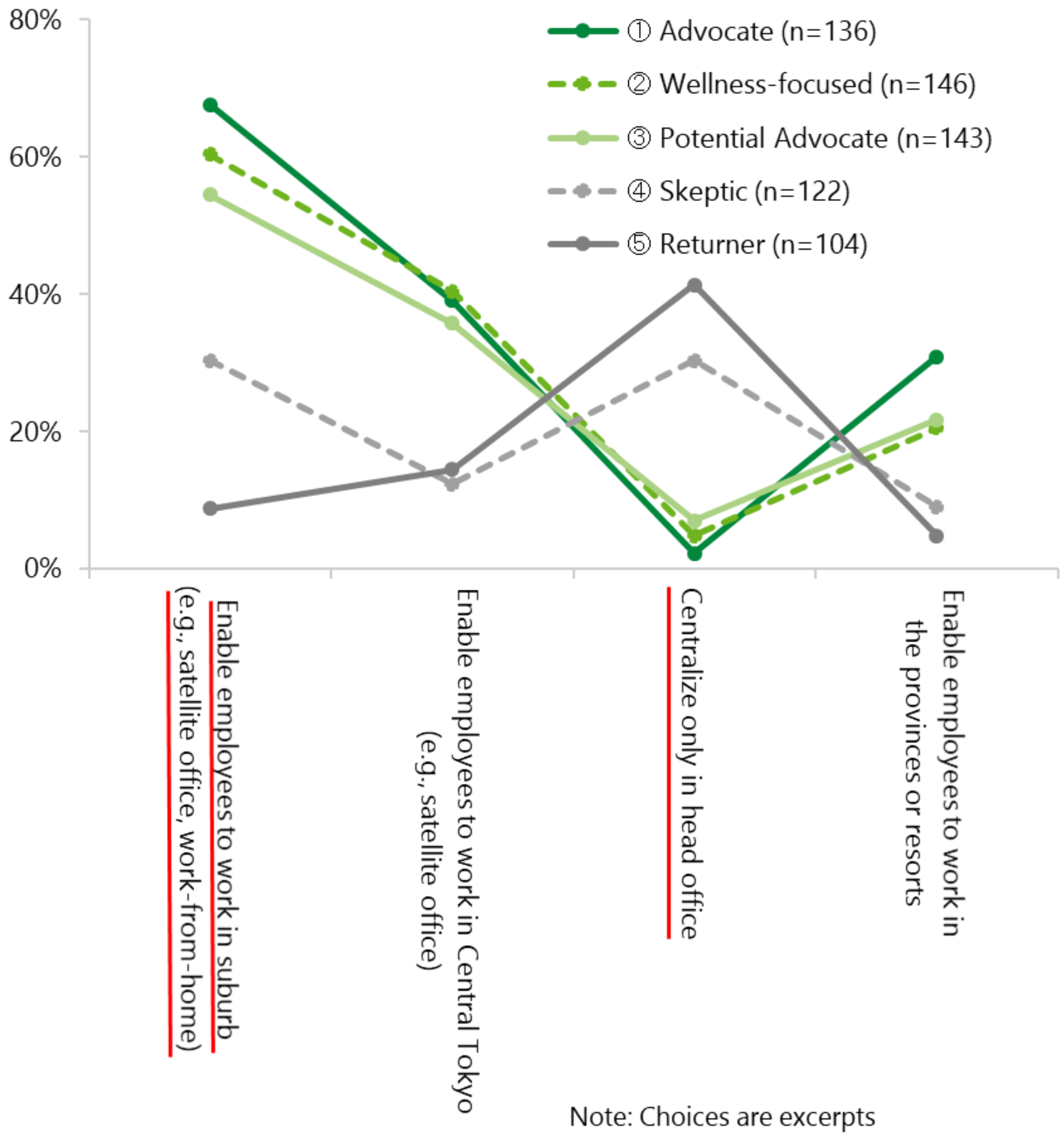
The percentage of companies wanting to introduce satellite offices differed between company types (**Figure 15**). The percentage was 100% among **① Advocate–③ Potential Advocate**, with **③ Potential Advocate**, in particular, showing a large shift in attitude. 100% of the companies of that type want to introduce a satellite office after the pandemic, as opposed to the current introduction rate of 0%. Considering that **③ Potential Advocate** has relatively small numbers of employees and small office space (**Figure 3**), the use of satellite offices is likely to spread beyond certain large companies to SMEs, which account for a majority of Japanese companies. On the other hand, the percentage of companies wanting to introduce satellite offices was low among **④ Skeptic** and **⑤ Returner**, at 0% and 15.4%, respectively, displaying stark differences in orientation toward a hybrid work style.

Figure 15: Current Introduction Rate of and Percentage of Companies Wanting to Introduce Satellite Offices (Recap)



① **Advocate–③ Potential Advocate** also had strong intentions to decentralize workplace functions geographically from central Tokyo to the suburbs, in addition to decentralizing from the conventional office where employees congregate (the main office) to employees' homes and satellite offices (**Figure 16**). While places for office work had been concentrated in central Tokyo, if the trend of decentralizing them to the suburbs triggered by the pandemic accelerates, it would solve social issues such as commuter rush hours and voids in suburban residential areas, as well as provide large benefits in terms of BCP (business continuity plans) in times of natural disasters, including earthquakes and pandemics. On the other hand, both ④ **Skeptic** and ⑤ **Returner** had strong intentions to "centralize only in head office," coinciding with the percentage of employees coming to the office mentioned earlier.

Figure 16: Intention toward Location of Workplace Other Than for Head Office Functions (Multiple Answer) (Recap)

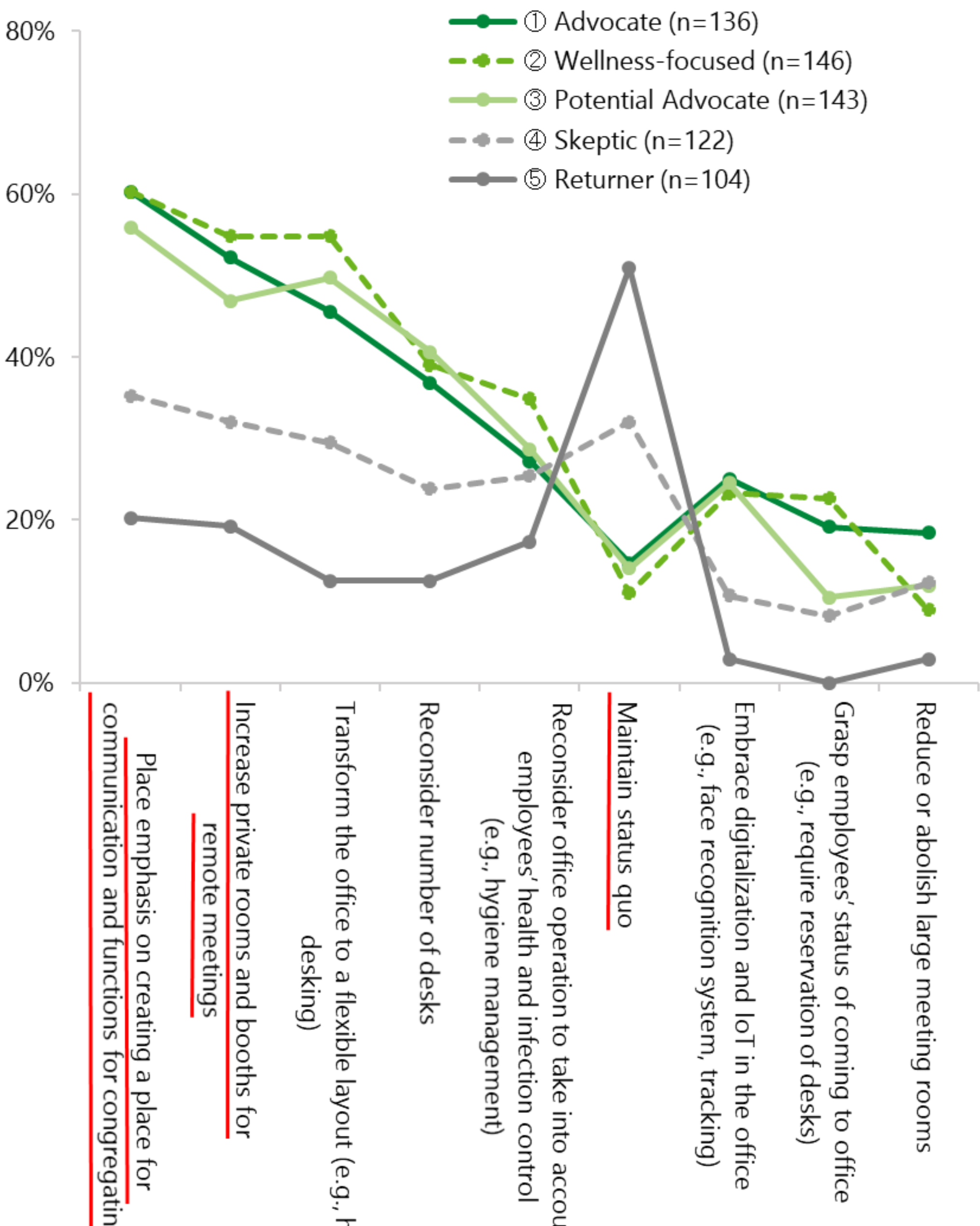


Note: Choices are excerpts

3.2. Intentions toward the Main Office

If a decentralized work style, such as teleworking, spreads, the conventional office where employees congregate (the main office) will be forced to change. According to the results of companies' interest in measures for their main office, **① Advocate–③ Potential Advocate** showed interest in measures based on a hybrid strategy that combines telework and coming to the office, including "Place emphasis on communication and functions for congregating" and "Increase private rooms and booths for remote meetings" (**Figure 17**). **② Wellness-focused**, in particular, was interested in various measures, suggesting their intention to promote telework as well as enhance their office environment. **④ Skeptic** and **⑤ Returner** had strong intentions to "Maintain the status quo."

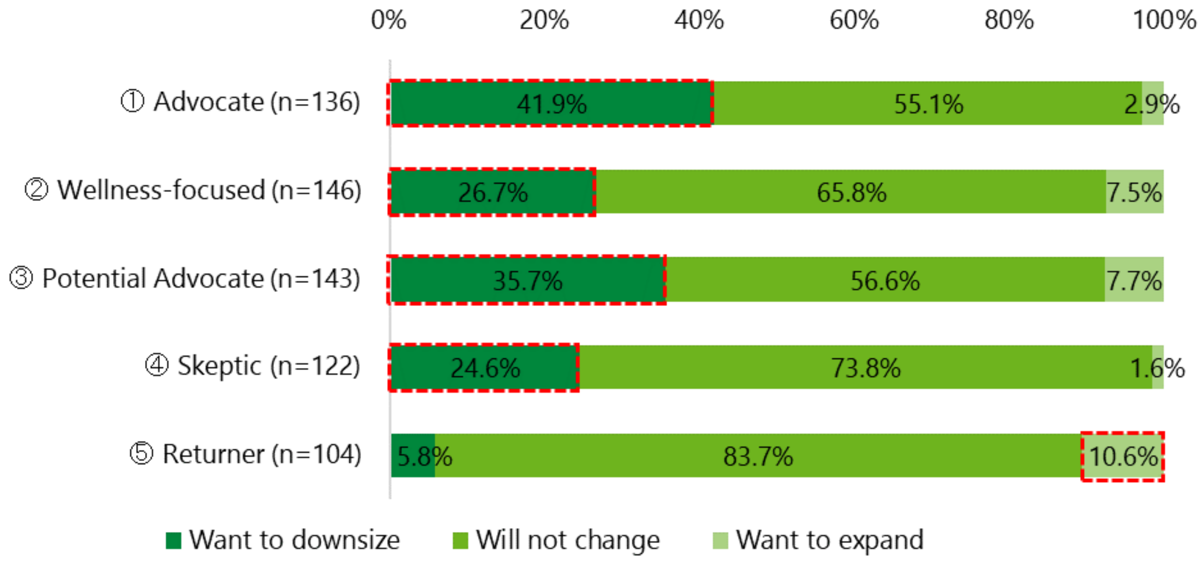
Figure 17: Measures for the Main Office Companies are Interested in (Multiple Answer) (Recap)



Note: Choices are excerpts

Changes in the use of the main office are likely to have an effect on office space. In terms of companies' intentions toward office space going forward, ① **Advocate** had the strongest intention to downsize (41.9%), while a certain percentage of ② **Wellness-focused–④ Skeptic** also had such intentions, indicating that they are considering improving office space efficiency at the same time as adopting telework (**Figure 18**). On the other hand, ⑤ **Returner**, who has strong intentions to centralize offices, had relatively strong intentions to expand the office (10.6%), indicating that they may play a role of supporting office demand depending on the economic situation going forward.

Figure 18: Office Space (Recap)



4. Conclusion

In this report, we classified companies into five types using data that indicate initiatives in work styles and the workplace, and found that the details of the companies' initiatives, the views behind the initiatives, and their future intentions were not uniform even if they had introduced a work-from-home policy in the same manner. In particular, we found that the intermediate group (③ **Potential Advocate**), which has not yet undergone major changes in their current initiatives, differed from ④ **Skeptic** and ⑤ **Returner**, who are inclined toward maintaining the status quo, as it intends to embrace a hybrid work style, such as introducing satellite offices, going forward.

The rapid spread of telework caused by the pandemic has triggered companies to rethink the meaning of the office. As a result, many companies have recognized the importance of workplace strategies as a managerial issue. It is safe to assume that the post-pandemic workplace strategy will be to decentralize workplaces or provide alternative workplaces and shift to a hybrid strategy of combining telework and coming to the office. In the July 2021 survey that was used in the clustering for this report, 70.9% of responding companies intended not to return to the office 100% after the pandemic.[*1] As companies reconsider the work style that requires all employees to congregate in the same office every day, the traditional office is unlikely to be able to respond to post-pandemic work styles. The rethinking of workplace strategies has become an urgent managerial issue for companies.

At the individual company level, it goes without saying that not all companies will embrace both telework and coming to the office. As is evident from Japan's situation during the pandemic, companies' views toward the workplace are highly individualized depending on the attributes and characteristics of each company (e.g., company size, sector, culture, intentions of top management) and range from returning to the office completely and abolishing the office. In the post-pandemic world where there is no longer the common goal of preventing infection, the individuality will become even more prominent, with workplace strategies strongly reflecting the company's characteristics.

Because there is no absolute answer for all companies, each company will have to continue searching for a better workplace strategy based on their respective management strategies. In terms of the five company types of this report, the two decentralizing types (① and ②) will be required to determine the optimal balance between teleworking and coming to the office, aim to leverage telework further (e.g., formulate guidelines for raising the currently low percentage of users of satellite offices), and redefine the roles of the main office from the perspective of long-term productivity and innovation. The two types with strong intentions to return to the office after the pandemic (④ and ⑤) may be required to reconsider and enhance the functions and positioning of the main office. The intermediate group (③ **Potential Advocate**) will be undergoing trial and error in their efforts, starting from scratch, to optimize the allocation of places for telework and raise awareness of their employees as they promote a decentralized work style.

In any case, all companies must recognize the common fact that simply returning to the pre-pandemic ways of using the office will no longer work. For many workers, who experienced new work styles due to the pandemic, a return to the office due to lack of strategy would lead to a sense of distrust of the organization and a decline in the organization's cohesiveness. It will also have a negative impact not only on securing personnel but also on labor productivity and innovation. These will directly result in a drop in the company's competitiveness. While there is no need for companies to introduce a hybrid work style across the board, if they choose to have their employees congregate in the office, it will be essential for them to convey to their employees that the choice is based on the intention of creating value by working together in the same place.

Although the COVID-19 pandemic has finally started to show signs of abating, the outlook remains difficult to foresee. The five types in this report only reflect the current situation and are temporary, but they should work as a guide for formulating strategies during times when companies are required the agility to address rapid changes in the business environment. Workplace strategies are becoming increasingly important as a managerial issue that should be considered continuously for the sustainability of companies. Xymax Real Estate Institute will continue to provide information that will serve as a guide.

Survey Overview

Survey title	*Greater Tokyo Company Survey on Work Styles and the Workplace* | *July 2021* (in Japanese only) Details of findings: https://soken.xymax.co.jp/2021/08/13/2108-greatertokyo_workstyle_survey_2107/
Survey period	July 6–18, 2021
Target respondents	40,688 companies in total that include: ・Client companies of XYMAX INFONISTA Corporation ・Companies subscribing to ZXY, a satellite office service for corporations
Number of valid answers	926 companies; response rate: 2.3%
Geographical coverage	Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba Prefectures)
Survey method	Email

Questions and Choices Used for Clustering

・**Introduction of work-from-home policy**

Had introduced from before the pandemic
Had introduced from before the pandemic and enhanced/expanded due to the pandemic
Had introduced from before the pandemic and continuing (incl. temporarily suspended but resumed)
Had introduced from before the pandemic but abolished
Have never introduced

・**Introduction of satellite offices**

Had introduced from before the pandemic
Had introduced from before the pandemic and enhanced/expanded due to the pandemic
Had introduced from before the pandemic and continuing (incl. temporarily suspended but resumed and temporarily restricting use)
Had introduced from before the pandemic but abolished
Have never introduced

・**Future intention toward introducing work-from-home policy**
・**Future intention toward introducing satellite offices**

Want to introduce/continue
Want to introduce/continue somewhat)
Do not want to introduce/continue somewhat
Do not want to introduce/continue
Don't know

・**Intentions after the pandemic: Theme to focus on going forward (Multiple answer)**

Encourage innovation & create new businesses; employee satisfaction & well-being; enhance international competitiveness; strengthen personnel strategies (e.g., personnel system, diversity);

promote DX; strengthen financial base (e.g., cost reduction); address SDGs; BCP measures (business continuity plan in times of infectious diseases and disasters); other; none in particular/don't know

・**Intentions after the pandemic: Location of head office functions**

Central Tokyo
Suburb or provinces
Will not have offices
Don't know

・**Intentions after the pandemic: Location of workplace other than for head office functions (Multiple answer)**

Enable employees to work in Central Tokyo (e.g., satellite office); enable employees to work in suburb (e.g., satellite office, work-from-home); enable employees to work in provinces or resorts (e.g., workation); centralize only in head office; don't know

・**Intentions after the pandemic: Strategy for the main office interested in (Multiple answer)**

Place emphasis on creating a place for communication and functions for congregating; increase private rooms and booths for remote meetings; transform the office to a flexible layout (e.g., hot-desking); reconsider number of desks; reconsider office operation to take into account employees' health and infection control (e.g., hygiene management); maintain status quo; embrace digitalization and IoT in the office (e.g., face recognition system, tracking); grasp employees' status of coming to the office (e.g., require reservation of desks); reduce or abolish large meeting rooms; don't know

・**Intentions after the pandemic: Office space**

Want to expand
Will not change
Want to downsize
Don't know

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%.

For further inquiries please contact below:

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