

Greater Tokyo Office Worker Survey 2021

Capturing changes in workers' work styles and values

December 17, 2021

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

Xymax Real Estate Institute ("Xymax REI") has been conducting questionnaire surveys to capture changes in work styles and the workplace from the perspectives of both companies and office workers. For companies, we have carried out a total of 11 Greater Tokyo Office Worker Surveys since autumn 2016 and four Greater Tokyo Company Surveys since August 2020. For office workers, we have conducted five Greater Tokyo Office Worker Surveys since the end of 2016. 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 6th office worker survey conducted in September 2021.

Summary of Survey Results

1. Reality of work styles under the COVID-19 pandemic

- Teleworkers accounted for approximately 70% of total, of whom less than 10% teleworked full time. Many teleworkers combined coming to the office on a situational basis. When including workers working in the office only, more than 90% of the workers came to the office to some degree.
- The implementation rate of work style initiatives rose across the board from the 2020 survey. In particular, the adoption rate of "Work-from-home allowances (for supplies, utility cost, etc.)" (16.7%) nearly doubled.
- Workers worked in their "regular office" for an average of around 60% of their time. They worked from home for most of the other time spent teleworking.
- The top answer for the benefit of coming to one's regular office was "Availability of work facilities (e.g., communications network, appliances, workspace)" (53.4%). Other top benefits were communication related.

2. Teleworking under the COVID-19 pandemic

- In terms of the number of days teleworkers teleworked, the most common was "Up to 5 days a week (81–100%)" (30.2%), followed by "Up to 1 day a week (up to 20%)" (23.8%). As much as around half of the teleworkers teleworked for 4–5 days a week (61–100%).
- The top answer for the benefit of teleworking was "Reduction in travel/commute time" (80.0%).
- The top answer for dissatisfaction with teleworking was "Difficult to communicate" (40.3%).
- The top answer for dissatisfaction with working from home was "Prone to lack exercise or become unhealthy" (56.5%). The survey also revealed that workers still lacked work facilities such as

appliances, monitors, photocopiers and internet connection, despite the increasing prevalence of working from home.

- The top answer for workers' impression toward satellite offices was "Easier to concentrate than when working from home" (51.6%).

3. Assessment of telework

- When we asked teleworkers to assess their performance and engagement under their current work style, more than 50% of them replied that both their performance and engagement "improved" or that there was "no change" compared to when they came to the office full-time for five days a week. As for stress, approximately 60% of the teleworkers replied that it was "alleviated." The percentage rose to more than 80% when including "No change."
- When looking at the comparison of the ease of performing tasks between working in the office and teleworking by assessment of performance, the group of respondents who experienced an improvement in performance when teleworking saw a larger proportion replying that the ease of performing the task was the same between working in the office and teleworking or was greater when teleworking for not only tasks done by oneself but also tasks that accompanied communication, compared to the group of respondents who experienced a decline in performance.
- In workers' dissatisfaction with working from home by assessment of performance, a significantly larger proportion of workers whose performance declined than those whose performance improved chose "Communication is difficult/reduced," "Difficult to switch on and off from work," "Difficult to concentrate, prone to distraction," and "Lack of space or appliances suited for work."

4. Work styles after the COVID-19 pandemic

- In terms of work styles going forward, 76.1% of all respondents wished to telework, which is more than the current percentage of teleworkers (67.7%).
- As for the frequency of telework, the percentage of respondents who prefer an extreme frequency, such as "Up to 1 day a week (up to 20%)" and "Up to 5 days a week (81–100%)," was smaller than the actual percentage, while the percentage of "Up to 2–4 days a week (21–80%)" was greater.
- The top choice for the type of office respondents wanted to come to work in after the pandemic was "There is a private room to concentrate on work" (44.6%). The preference rate rose from the previous survey in features related to meeting and congregating with people, such as "Easy to chat or have random communication with others" (27.3%).
- The top feature of importance when using a satellite office was "It is close to home" (57.5%).

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>
- *Greater Tokyo Office Worker Survey 2019*, released on December 19, 2019
<https://www.xymax.co.jp/english/research/images/pdf/20191219.pdf>
- *Greater Tokyo Office Worker Survey 2020*, released on November 24, 2020
<https://www.xymax.co.jp/english/research/images/pdf/20201124.pdf>

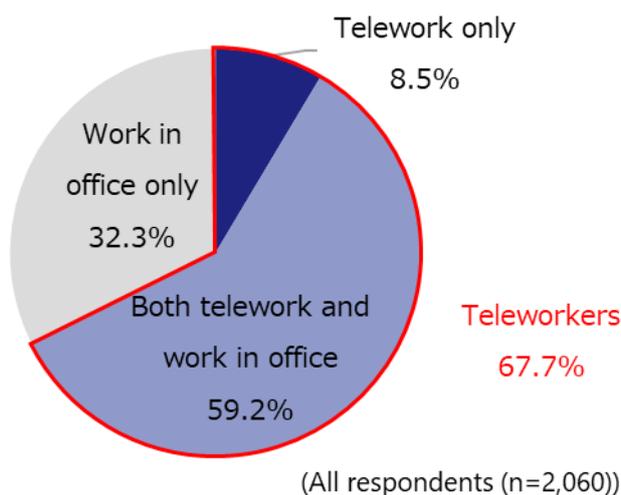
1. 1. Reality of work styles under the COVID-19 pandemic

1.1. Percentage of teleworkers

In this survey, we obtained valid answers from 2,060 men and women aged 18 and above, 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 before the pandemic as well as now was the office or home. In this report we will look into the actual situations of how the respondents currently work.

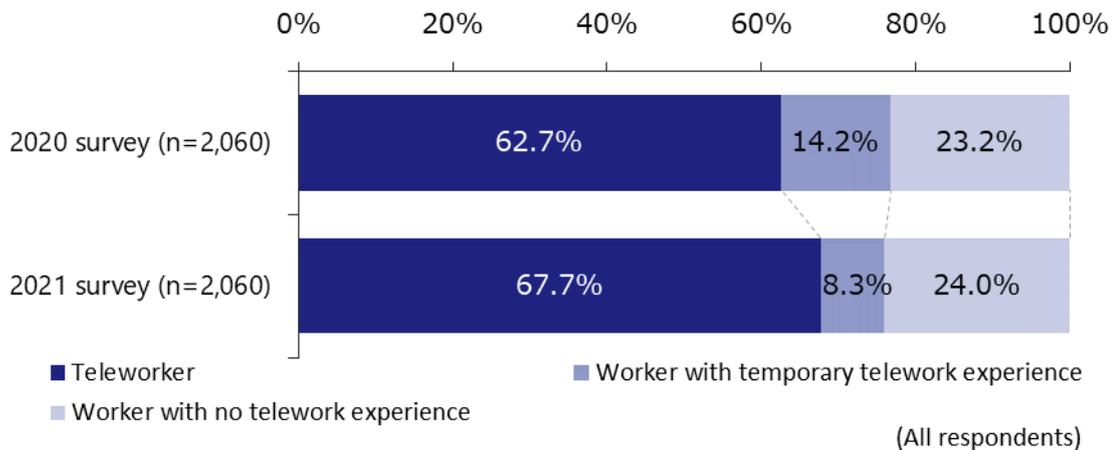
We will start by looking at how many workers came to the office under the COVID-19 pandemic. At the time of the survey, “teleworkers,” i.e., respondents who teleworked even to a small extent, accounted for 67.7% of all respondents, while those who worked in the office only and did not telework accounted for 32.3% (**Figure 1**). Those who replied that they teleworked full-time accounted for less than 10% of total (8.5%), indicating that many teleworkers both teleworked and came to the office. More than 90% of the workers, including those who worked in the office only, came to the office to some degree.

Figure 1: Coming to the Office or Teleworking



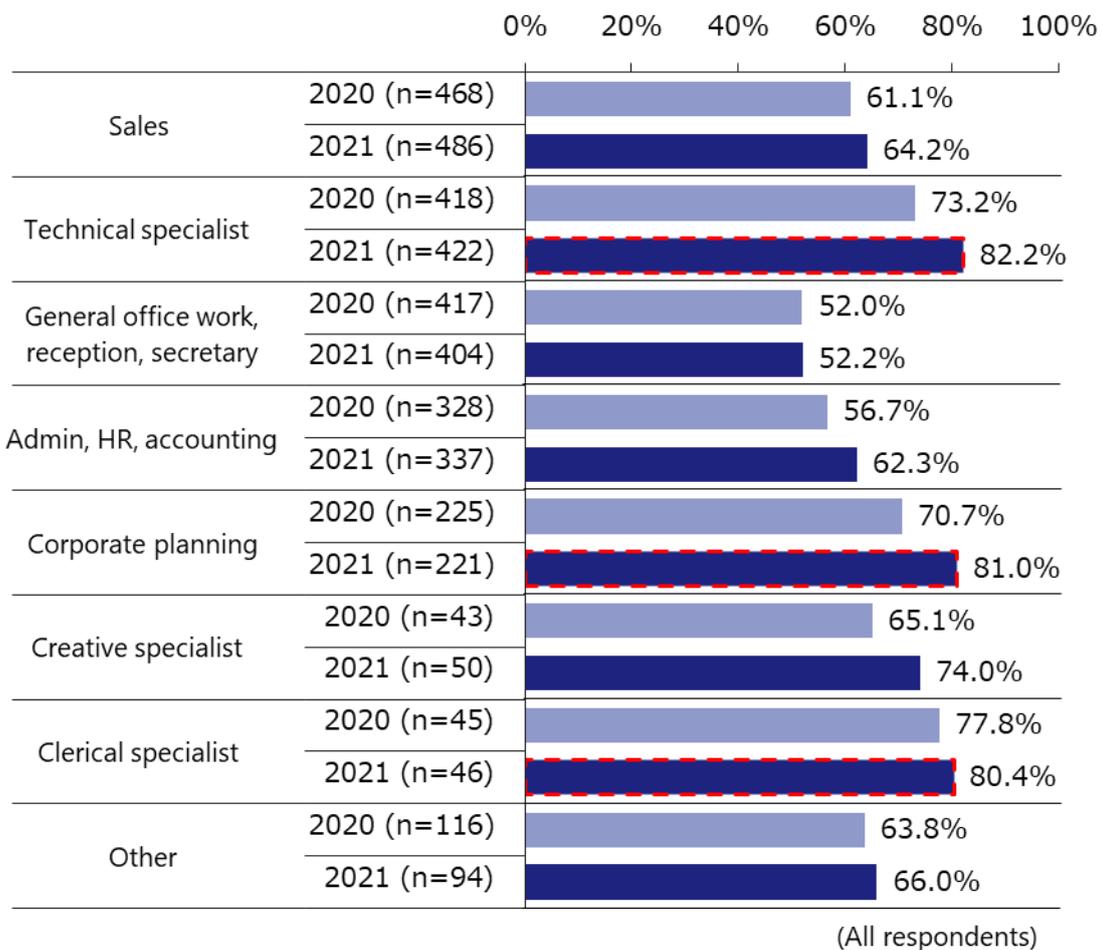
We then compared the situation of workers coming to the office and teleworking shown in **Figure 1** with the 2020 survey after sorting workers who replied that they currently worked in the office only into “workers with temporary telework experience” if they had temporarily teleworked either before or after the outbreak of the COVID-19 pandemic, and “workers with no telework experience” if they had never teleworked before (**Figure 2**). As a result, the percentage of teleworkers increased by 5.0 pp from the 2020 survey, while that of workers with temporary telework experience dropped by 5.9 pp. This suggests that some workers switched between teleworking and coming to the office based on company orders or their own judgment in consideration of the situation. Indeed, contrary to when the 2020 survey was conducted (September 2020), when infection numbers were low, the 2021 survey was carried out during the 4th declaration of a state of emergency, which likely reinforced telework. We also found that workers with no telework experience, who do not or cannot telework regardless of the situation, exist to a certain degree.

Figure 2: Implementation of Telework



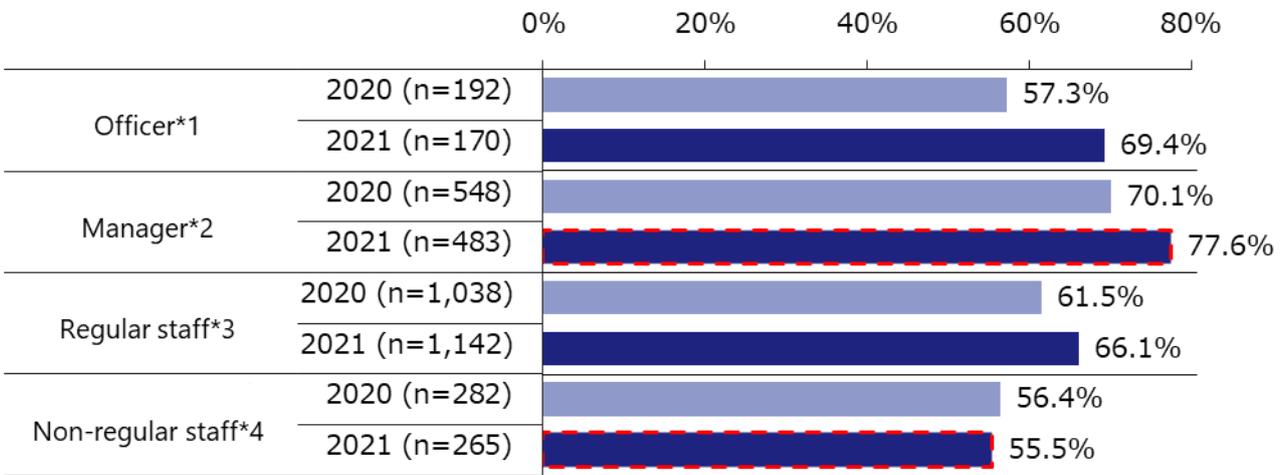
In terms of the percentage of teleworkers by job category, teleworkers accounted for more than 80% in “Technical specialist” (82.2%), “Corporate planning” (81.0%), and “Clerical specialist” (80.4%). In particular, the percentage of teleworkers among technical specialists and workers engaged in corporate planning rose by 9.0 pp and 10.3 pp from the 2020 survey, respectively. On the other hand, the percentage of teleworkers was relatively small in “General office work/reception/secretary” (52.2%) (Figure 3).

Figure 3: Percentage of Teleworkers (By Job Category)



In terms of job position, “Manager” (77.6%) had the largest rate of teleworkers. “Non-regular staff” had the smallest percentage (55.5%) and was also the only position that did not see a growth from 2020 (Figure 4).

Figure 4: Percentage of Teleworkers (By Job Position)



*1 Officer of company or organization

*2 Staff of company or organization (manager)

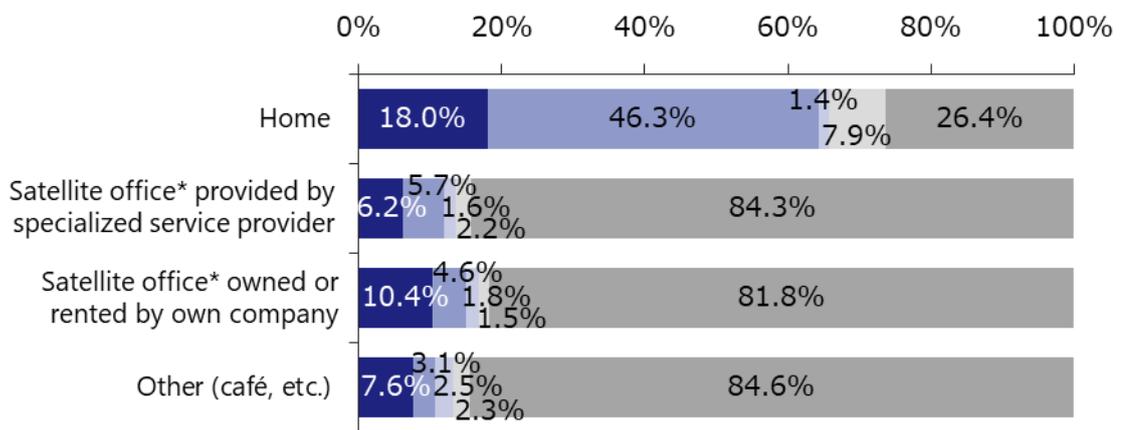
*3 Staff of company or organization (regular staff other than manager)

*4 Staff of company or organization (other than regular staff)

(All respondents)

We then examined the current implementation of telework and when telework was introduced for each place of telework (home, satellite office, other (café, etc.)) (Figure 5). Satellite offices were divided into those provided by a specialized service provider and those owned or rented by own company. As for working from “Home,” where telework was implemented the most, 46.3% of the respondents replied that they “had not implemented before COVID-19 outbreak but did so after the outbreak,” confirming the intensity of the impact of the pandemic.

Figure 5: Implementation of Telework and Timing of Introduction for Each Place of Telework



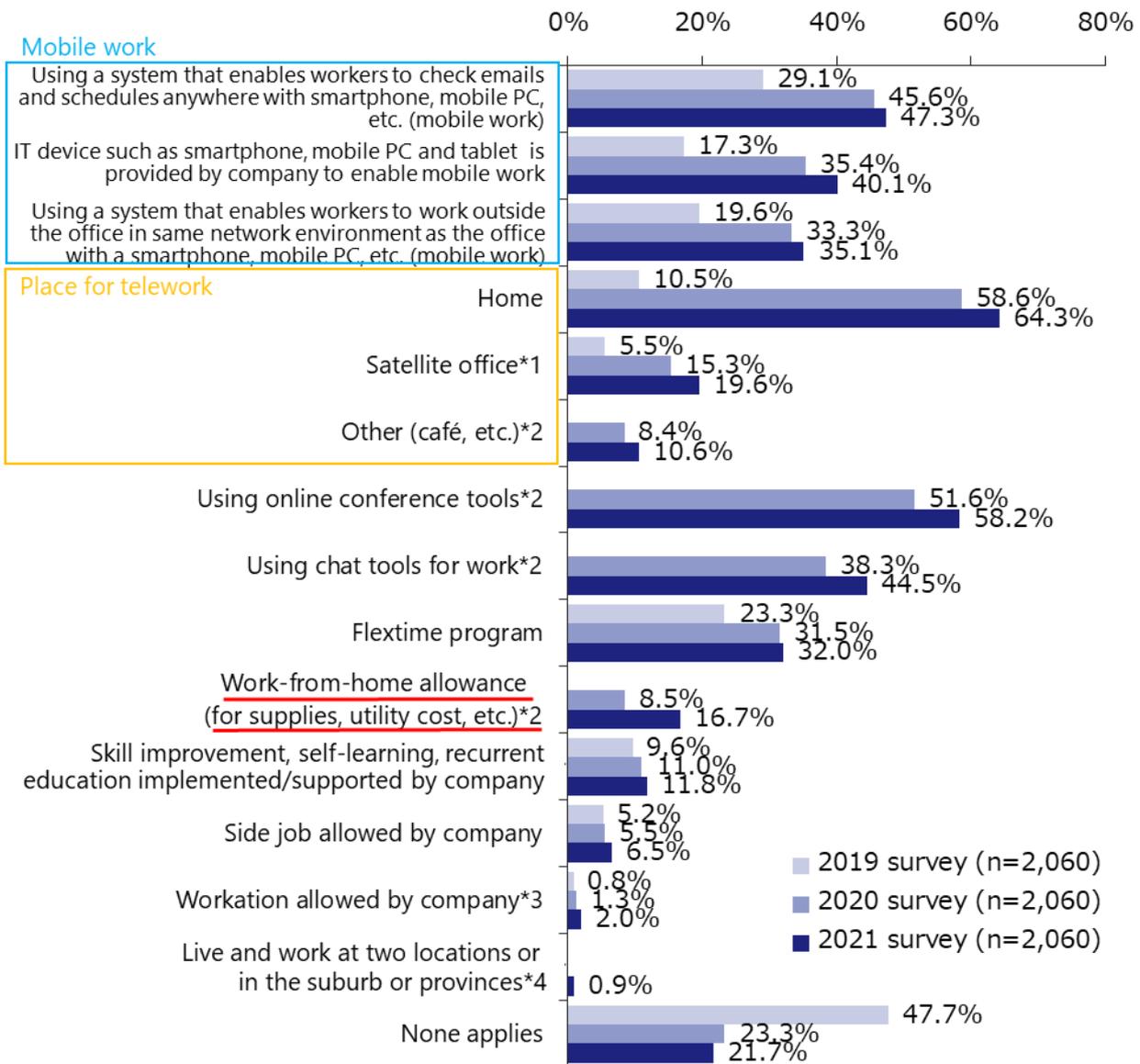
- Had implemented from before COVID-19 outbreak and continue to do so
- Had not implemented before COVID-19 outbreak but did so after outbreak
- Had implemented before COVID-19 outbreak but not anymore
- Had implemented temporarily after COVID-19 outbreak but not anymore
- Have never implemented

(All respondents (n=2,060))

* Satellite office: A collective term that refers to workplaces provided for telework apart from the main office or the homes of workers.

In addition to the places of telework in **Figure 5**, we did a year-to-year comparison of currently implemented work style initiatives (**Figure 6**). The implementation rate rose significantly across the board in the 2020 survey following the outbreak of the pandemic and continued to rise in all initiatives this year. In particular, “Work-from-home allowance (for supplies, utility cost, etc.)” (8.5%→16.7%) nearly doubled from 2020, suggesting that secondary initiatives not in place last year when telework spread rapidly are gradually starting to prevail.

Figure 6: Implementation Rate of Work Style Initiatives



(All respondents; MA)

*1 Satellite office: A collective term that refers to workplaces provided for telework apart from the main office or the homes of workers. The 2019 and 2021 surveys show the results of "Use of satellite office, etc. owned or rented by own company" and "Use of serviced office or shared office provided by a specialized operator" combined.

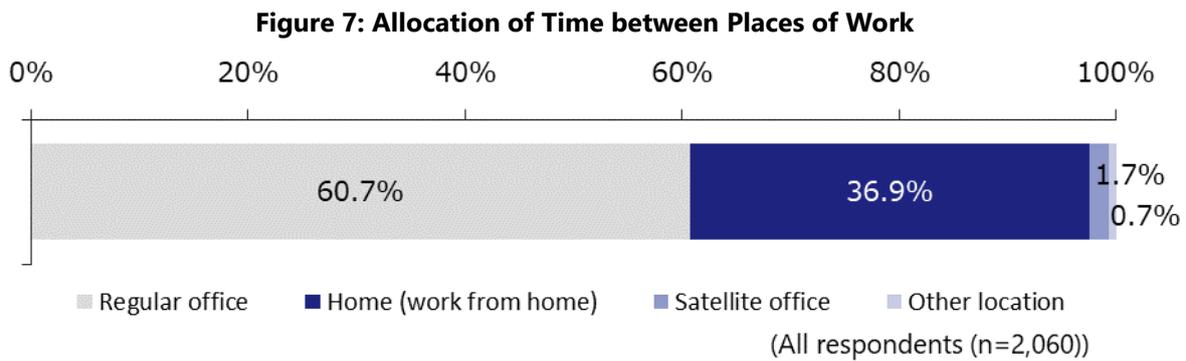
*2 There is no chart for the 2019 survey since the choice was added from the 2020 survey.

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

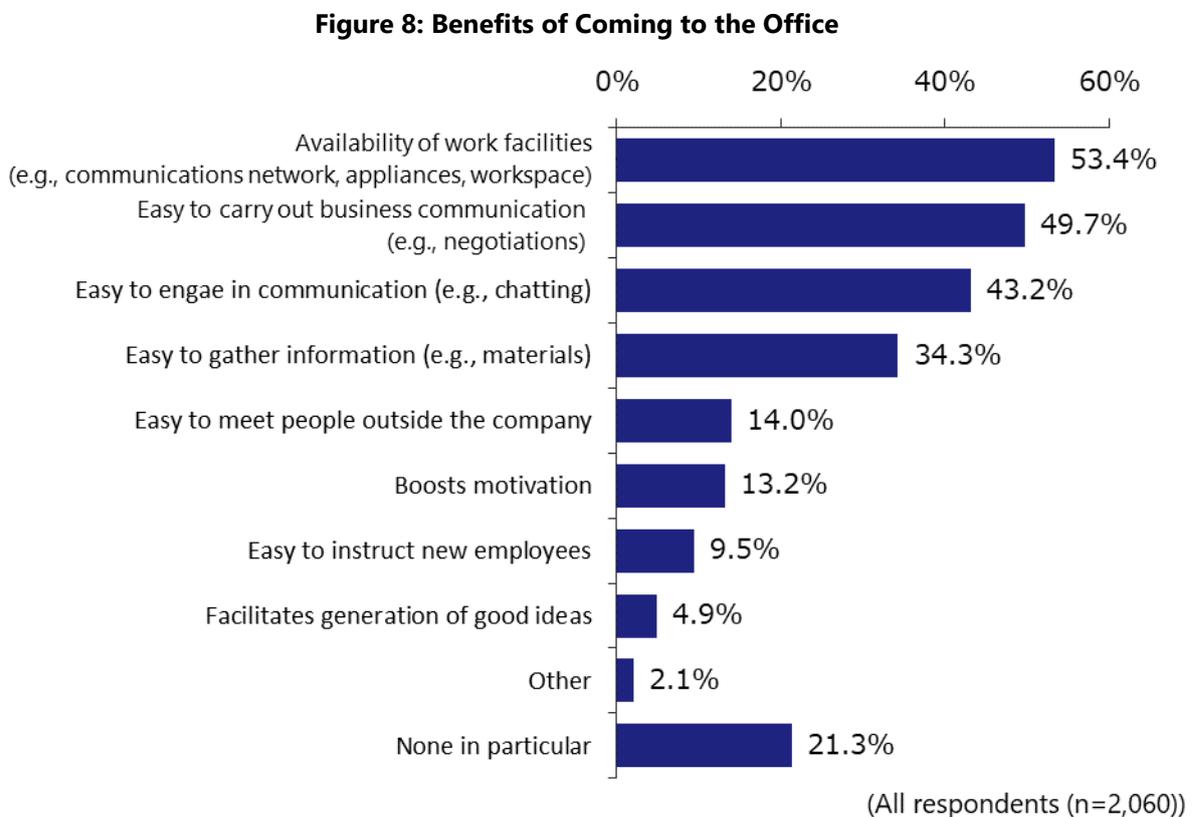
*4 There are no charts for the 2019 and 2020 surveys since the choice was added from the 2021 survey.

1.2. Switching between coming to the office and teleworking

In the previous section we found that while 70% of all workers teleworked, many of them also used the office. Therefore, we examined how workers split their time between each place of work, i.e., their regular office, home (working from home), satellite office, and other location, and found that workers spent an average of around 60% of their time working from their regular office (**Figure 7**). Furthermore, most of their time spent working other than in their regular office, i.e., their time teleworking, was spent working from home, indicating that currently for workers, teleworking means working from home.

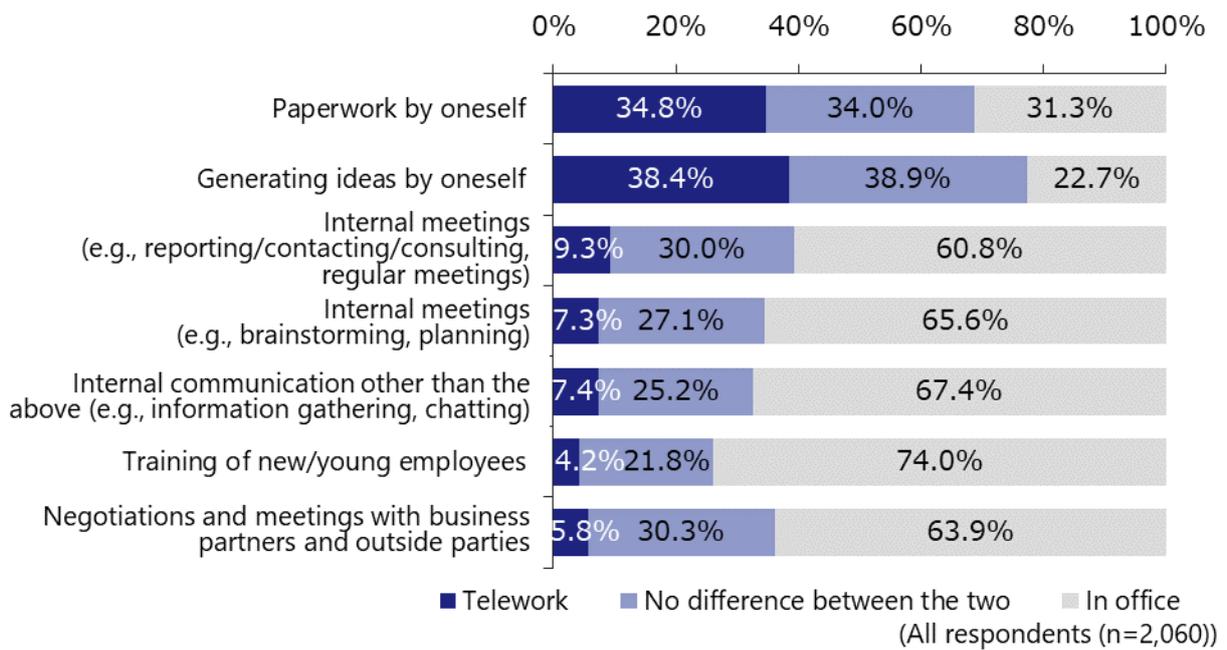


As for the benefit of coming to one’s regular office, the top reply was “Availability of work facilities (e.g., communications network, appliances, workspace) (53.4%) (**Figure 8**). This was followed by “Easy to carry out business communication (e.g., negotiations)” (49.7%) and “Easy to engage in communication (e.g., chatting)” (43.2%), indicating workers’ appreciation of communication-related benefits. Furthermore, “Easy to gather information (e.g., materials)” (34.3%) may be something that would prove difficult when teleworking.



We then asked the respondents which was easier to perform certain tasks—in the office or by telework (**Figure 9**). For “Paperwork by oneself” and “Generating ideas by oneself,” telework gained more votes than working in the office, revealing that many workers thought solo tasks were more easily done when teleworking. On the other hand, 60–70% of the respondents replied that tasks done by multiple persons, such as “Internal meetings,” were more easily performed in the office. “Training of new/young employees,” in particular, was the type of task in the survey that gained the largest percentage of respondents replying it was more easily done in the office. However, we also found that, in all task types, a certain number of workers replied there was no difference in the ease of work between teleworking and working in the office or that it was easier to work when teleworking.

Figure 9: Ease of Performing Tasks <Telework vs In-office>

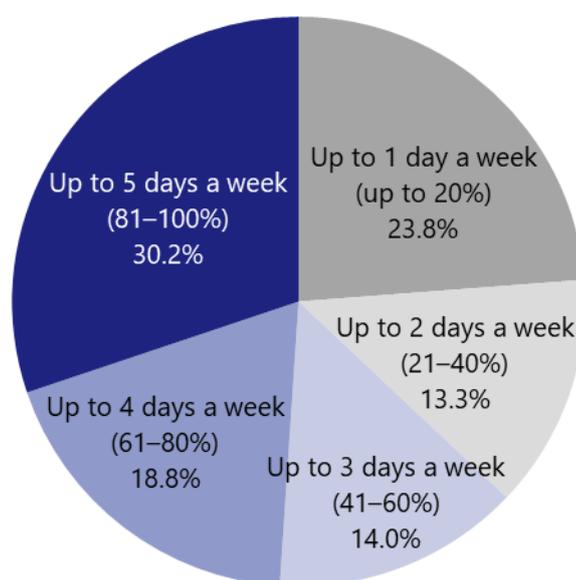


2. Teleworking under the COVID-19 Pandemic

2.1. Frequency of telework

In this chapter we will focus on the work styles of teleworkers. We asked teleworkers how much they came to the office and how much they teleworked by asking their average allocation of time over a week spent working in the office and teleworking. According to the distribution of telework implementation in numbers of days based on a five-day work week, “Up to 5 days a week (81–100%)” was the most common at 30.2%, followed by “Up to 1 day a week (up to 20%)” (23.8%) (**Figure 10**). This indicates that a large number of teleworkers teleworked at an extreme frequency, such as every day and occasionally. Teleworkers who teleworked at a rate of 4–5 days a week (61–100%) accounted for around half of all teleworkers.

Figure 10: Teleworkers’ Frequency of Telework

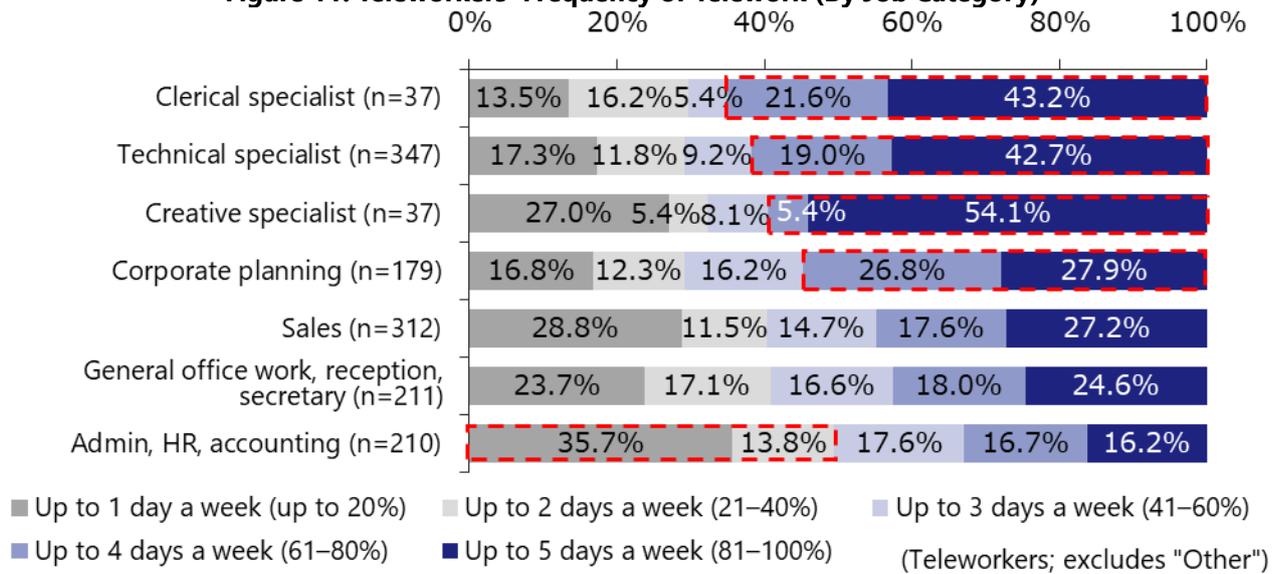


(Teleworkers (n=1,395))

Note: The percentage of time allocated to telework is converted into numbers of days

Looking at this result by job category, more than half of teleworkers in the following job categories teleworked at a frequency of 4–5 days a week (61–100%): clerical specialist (64.8%); technical specialist (61.7%), creative specialist (59.5%), and corporate planning (54.7%) (**Figure 11**). On the other hand, only 16.2% of teleworkers in the admin/HR/accounting category teleworked at a rate of “Up to 5 days a week (81–100%),” with around 50% teleworking 1–2 days a week (up to 40%).

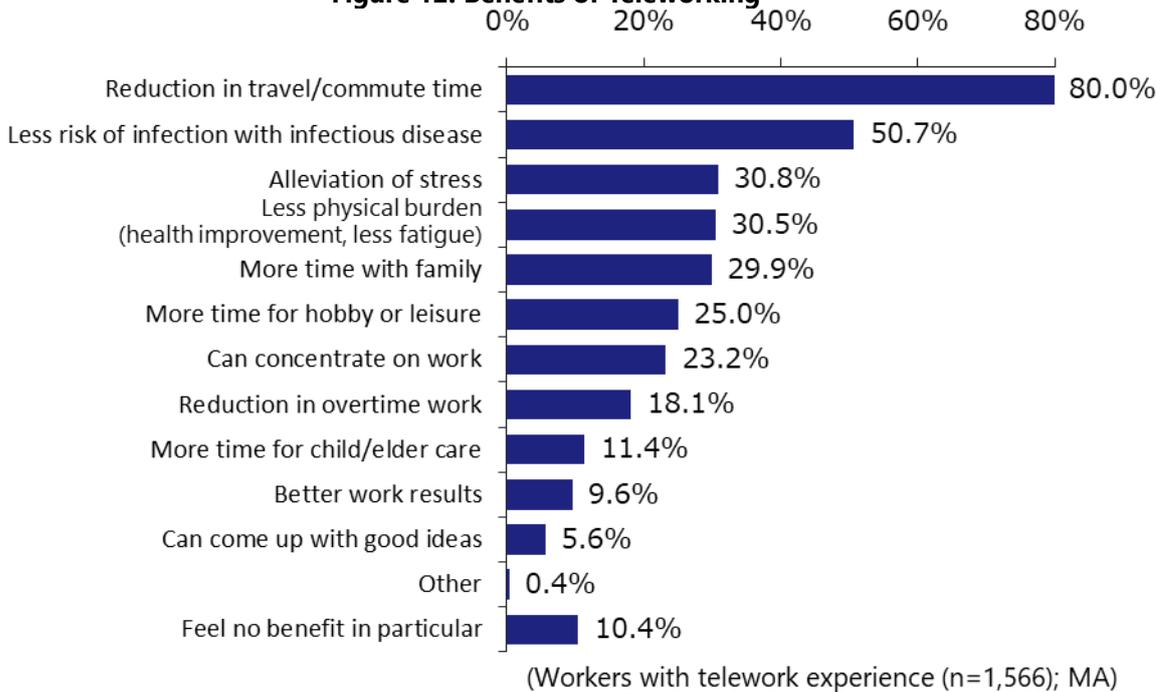
Figure 11: Teleworkers’ Frequency of Telework (By Job Category)



2.2. Benefits of and dissatisfaction with teleworking

We then examined the benefits of teleworking felt by workers with telework experience (“teleworkers” and “workers with temporary telework experience”) (Figure 12). The top benefit was “Reduction in travel/commute time” (80.0%), followed by “Less risk of infection with infectious disease” (50.7%), suggesting that workers actually felt the infection control benefit of working from home, which accounted for most of the breakdown of telework and was adopted by many workers due to the COVID-19 pandemic as shown in Figures 5 and 7. They were followed by “Alleviation of stress” (30.8%) and “Less physical burden (health improvement, less fatigue)” (30.5%)—the alleviation of physical and mental burden due to the elimination of commuting to the office. Meanwhile, only around 10% chose “Feel no benefit in particular” (10.4%), indicating that many of the workers with telework experience saw some kind of benefit in teleworking.

Figure 12: Benefits of Teleworking



Similarly, we asked workers with telework experience their dissatisfaction with teleworking. The top reply was “Difficult to communicate when teleworking” (40.3%) (Figure 13). The fact that communication was among the top benefits of coming to the office in Figure 8 and that workers found tasks requiring communication more easily performed when working in the office than when teleworking in Figure 9 also suggests that communication is the greatest issue of telework. Other top replies included, “Lack of company’s subsidy/support toward telework” (26.3%) and “A sense of inequality between those who can and who cannot telework (due to job category or department)” (20.3%). Meanwhile, as much as 27.7% chose “None in particular.”

Figure 13: Dissatisfaction with Teleworking

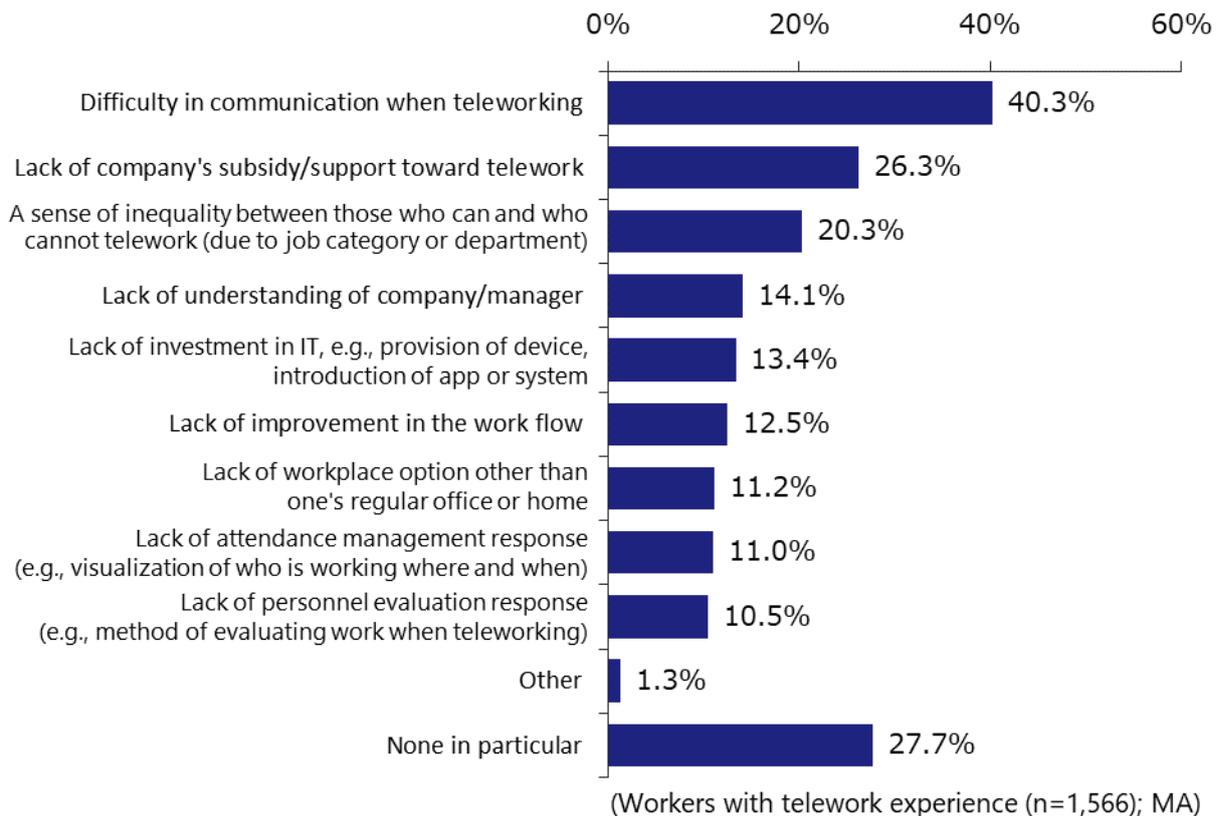
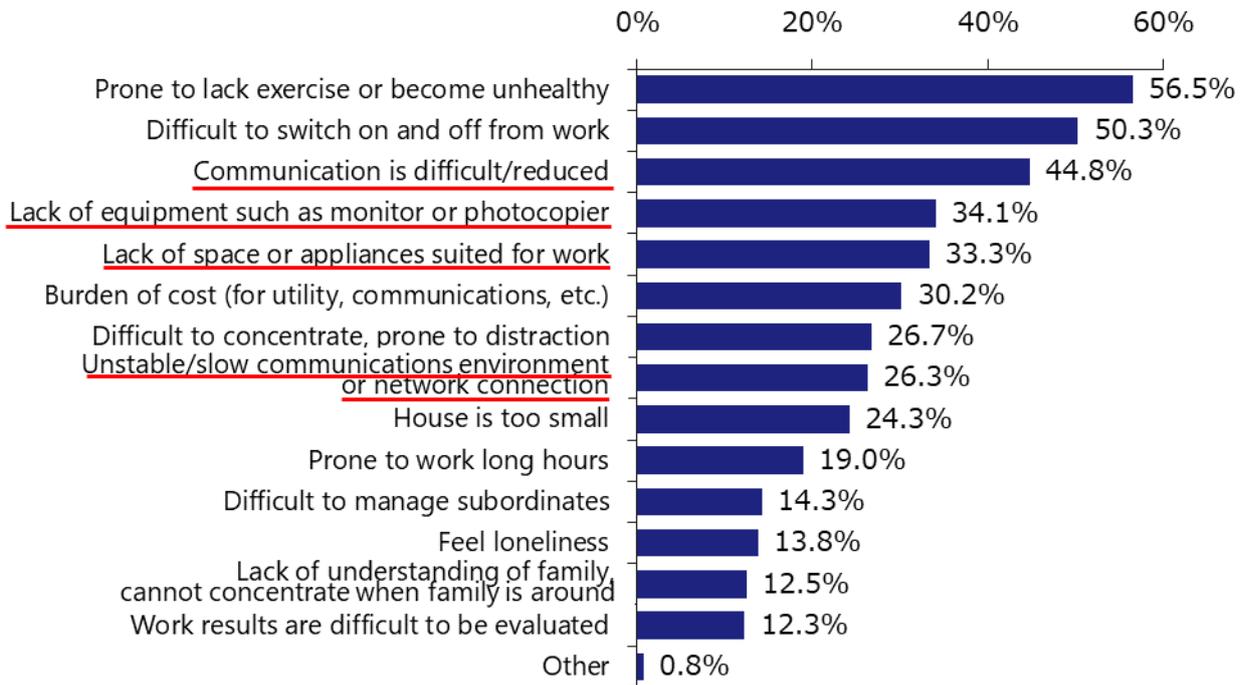


Figure 14 shows the dissatisfaction with working from home felt by workers with work-from-home experience who felt some kind of dissatisfaction. Just as communication was cited as a point of dissatisfaction with teleworking, “Communication is difficult/reduced” (44.8%) ranked high as a point of dissatisfaction with working from home. However, a greater percentage of respondents chose “Prone to lack exercise or become unhealthy” (56.5%) and “Difficult to switch on and off from work” (50.3%), indicating that the teleworking benefit of alleviation of burdens due to the reduction of commute time turns into a disadvantage when working from home, as workers tend to be stuck in home. The survey also revealed that workers still lacked work facilities such as appliances, monitors, photocopiers, and internet connection, although working from home has begun to prevail and take root after 18 months since the 1st declaration of a state of emergency. Some of the facilities may be difficult to be prepared by individuals, which suggests the need to provide subsidy and support for developing a work environment and to establish places for work other than the home.

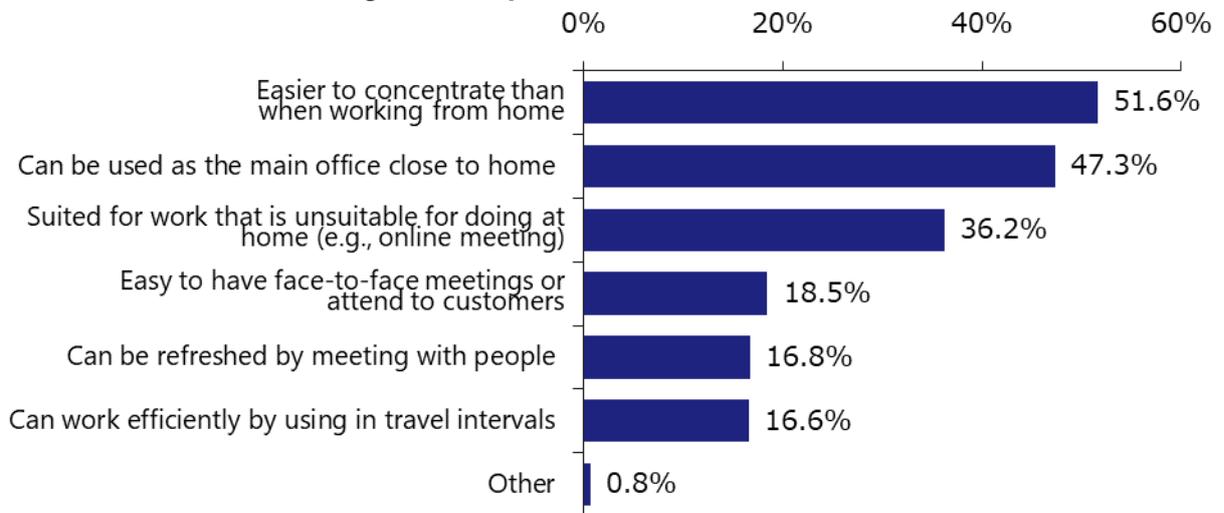
Figure 14: Dissatisfaction with Working from Home



(Workers with work-from-home experience who feel dissatisfaction (n=1,319); MA)

As for workers’ impressions of satellite offices, the top reply was “Easier to concentrate than when working from home” (51.6%) (Figure 15). “Can be used as the main office close to home” (47.3%) and “Suited for work that is unsuitable for doing at home (e.g., online meeting)” (36.2%) followed. These top 3 impressions imply that workers view satellite offices as more of an alternative to the home or the office than as a touchdown office, which was the mainstream before the pandemic. Satellite offices would be effective as a place that can make up for workers’ dissatisfaction with working from home as seen in Figure 14 and enjoy the benefits of telework. Less than 20% of workers chose “Easy to have face-to-face meetings or attend to customers” (18.5%) and “Can be refreshed by meeting with people” (16.8%), suggesting that many workers envisaged using a private room instead of a meeting room for several people.

Figure 15: Impression of Satellite Offices



(Excluding "None in particular" (n=1,157))

3. Assessment of telework

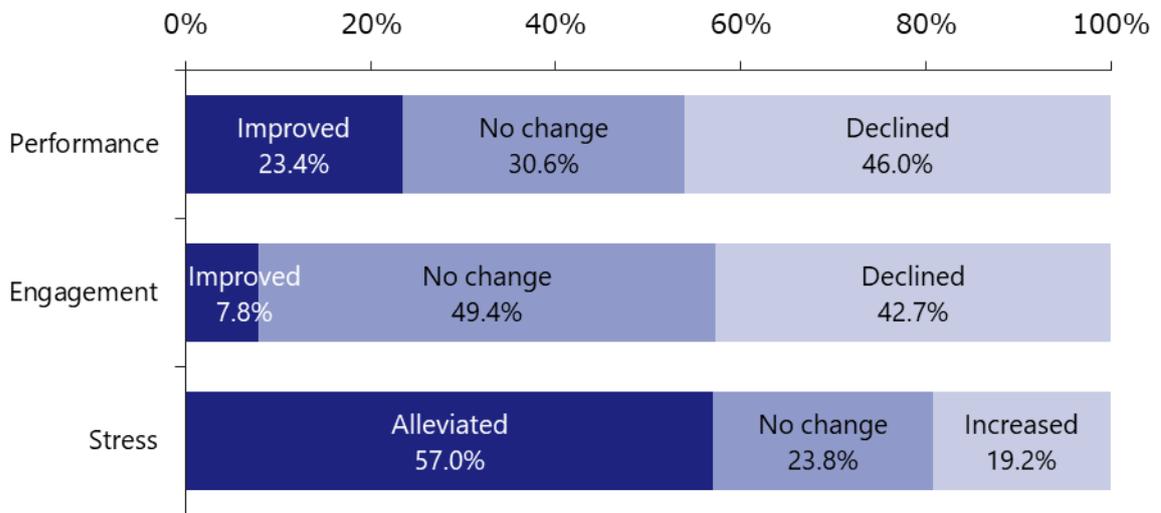
In this chapter we will look at workers’ assessment of telework. We asked teleworkers*¹ to rate their current work style (a comprehensive rating including not only when teleworking but also when coming to the office) from the perspectives of performance, engagement, and stress, with coming to the office 5 days a week as 100. The average ratings were as follows: performance 96.7, engagement 87.4, and stress 83.7.

*1 Excludes workers who currently allocate 100% of their work time to their regular office.

We sorted the assessment into three groups*² for each perspective and indicated their respective percentages in **Figure 16**. The percentage of those who replied that performance “improved” under their current work style compared to when coming to the office 5 days a week was 23.4%. While there are some concerns that performance and engagement might decline when teleworking, the sum of “Improved” and “No change” accounted for more than 50% in both. As for stress, approximately 60% of the teleworkers replied that it was “alleviated,” with the percentage rising to more than 80% when including “No change.”

*2 For performance and engagement, ratings of 101 and above were categorized as “Improved,” 100 as “No change,” and 99 and below as “Declined.” For stress, ratings of 99 and below were categorized as “Alleviated,” 100 as “No change,” and 101 and above as “Increased.”

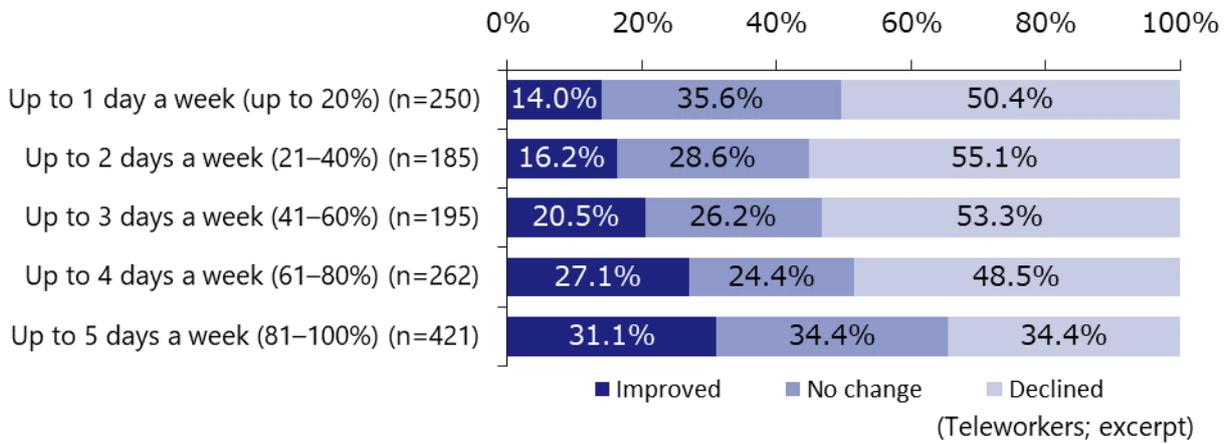
**Figure 16: Teleworkers’ Assessment of Performance, Engagement, and Stress
<Compared to Coming to the Office 5 Days a Week>**



(Teleworkers; excerpt (n=1,313))

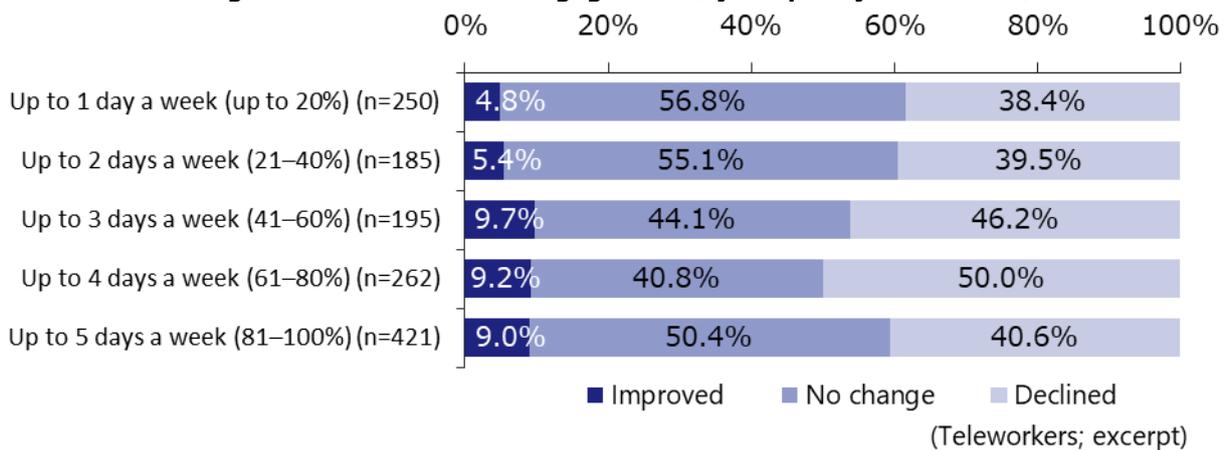
When examining **Figure 16** in terms of telework frequency, performance tended to be “improved” among a greater proportion of teleworkers as the frequency of telework rose (**Figure 17**).

Figure 17: Assessment of Performance (By Frequency of Telework)



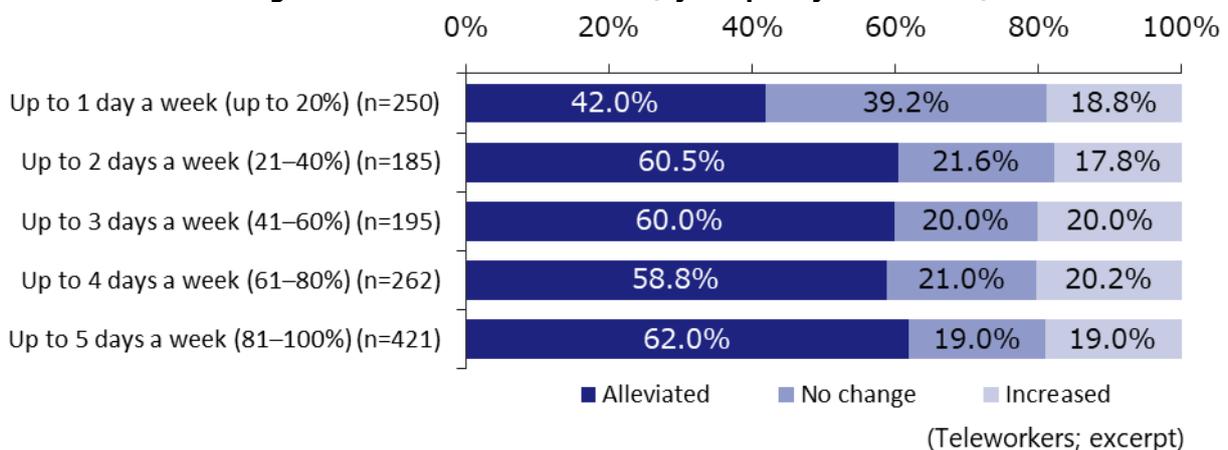
No trend that was caused by frequency of telework was observed in particular for engagement (**Figure 18**).

Figure 18: Assessment of Engagement (By Frequency of Telework)



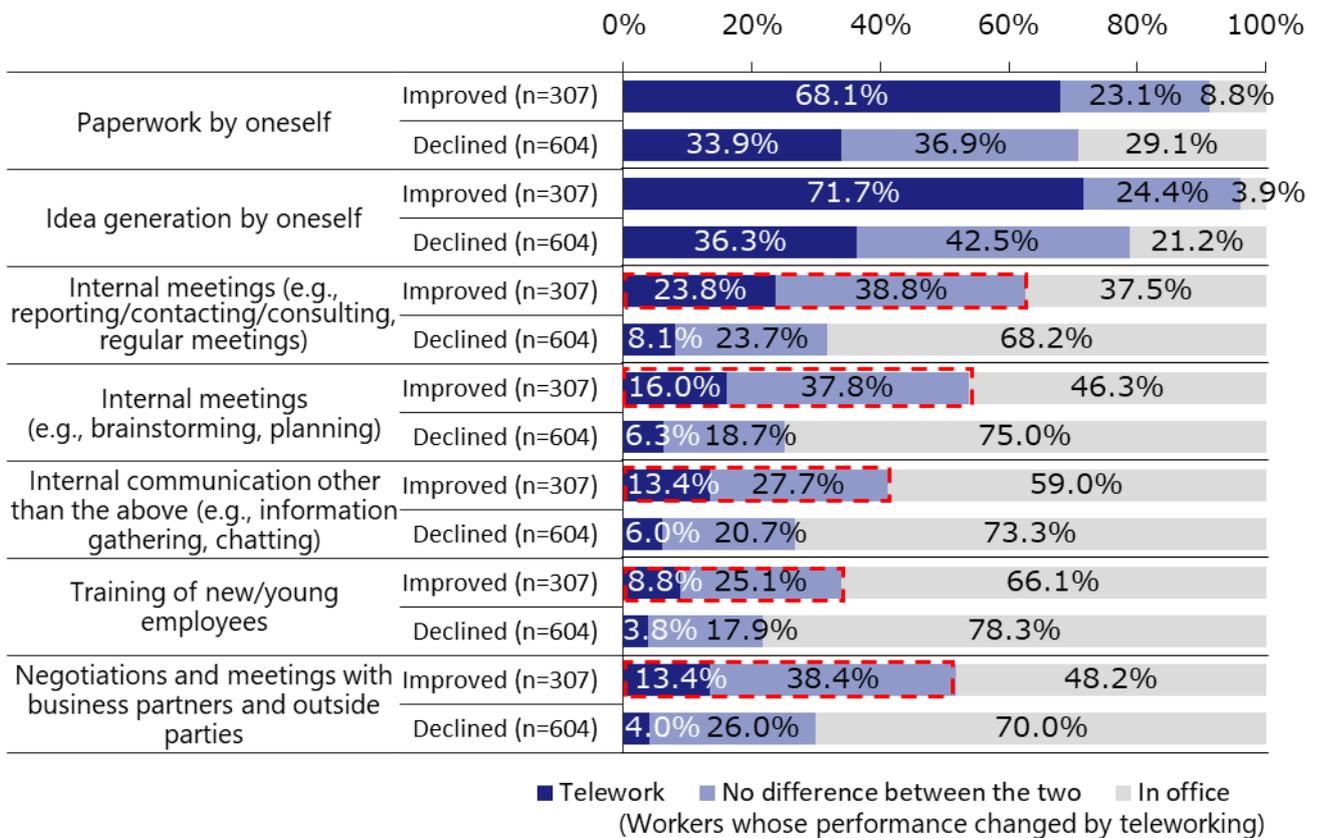
As for stress, although there was a difference between “Up to 1 day a week (up to 20%)” and “Up to 2 days a week (21–40%),” after that approximately 60% felt stress was “alleviated” regardless of frequency (**Figure 19**).

Figure 19: Assessment of Stress (By Frequency of Telework)



Of the above assessments, we will look into the factors that influence the assessment of performance. In **Figure 20**, we compared the ease of performing tasks between working in the office and teleworking by assessment of performance. The results show that the group of respondents whose performance improved saw a larger proportion of workers replying that the ease of performing the task was greater when teleworking for all the tasks compared to the group of respondents whose performance declined. The group of respondents whose performance improved also saw a significantly larger proportion of workers replying that the ease of task performance was the same or greater when teleworking than when working in the office for tasks that accompanied communication. For “Internal meetings” and “Negotiations and meetings with business partners and outside parties,” more than 50% of the group with improved performance replied that the ease was the same between when teleworking and when working in the office or greater when teleworking.

Figure 20: Ease of Performing Tasks (By Assessment of Performance) <Telework vs In-office>



Indeed, when we look at workers’ dissatisfaction with teleworking by assessment of performance, there is a large difference in the percentage of those who felt it “difficult to communicate,” with the percentage of the group of respondents with declined performance 27.7 points greater than that of the group of those with improved performance, while most other points of dissatisfaction showed little difference between the two groups (Figure 21). Since the top dissatisfaction with teleworking was communication-related in Figure 13, the ease of communication may have affected performance.

Figure 21: Dissatisfaction with Teleworking (By Assessment of Performance)

	Declined (n=604) (%)	Improved (n=307) (%)	"Declined" – "Improved" (points)
<u>Difficult to communicate when teleworking</u>	57.3%	29.6%	27.7
Lack of improvement in the work flow	15.2%	9.8%	5.4
Lack of attendance management response (e.g., visualization of who is working when and where)	15.1%	11.7%	3.4
A sense of inequality between those who can and who cannot telework (due to job category or department)	20.7%	18.2%	2.5
Lack of investment in IT, e.g., provision of device, introduction of app or system	14.1%	13.4%	0.7
Lack of personnel evaluation response (e.g., method of evaluating work when teleworking)	12.7%	13.0%	-0.3
Lack of workplace option other than one's regular office or home	12.1%	13.0%	-0.9
Lack of company's subsidy/support toward telework	28.5%	30.0%	-1.5
Lack of understanding of company/manager	13.7%	16.0%	-2.3
Other	1.7%	1.3%	0.4
None in particular	16.2%	28.0%	-11.8

(Workers whose performance changed by teleworking; MA)

We then compared workers’ dissatisfaction with working from home, which accounts for most of the telework time (**Figure 7**), by assessment of performance (**Figure 22**). There were large differences in the assessment of performance in dissatisfactions such as “Difficult to switch on and off from work” (difference between “Declined” and “Improved” (the same applies hereinafter): 25.0 pp), “Difficult to concentrate, prone to distraction” (22.6 pp), and “Lack of space or appliances suited for work” (15.1 pp), in addition to the communication-related dissatisfaction, which we have focused on thus far as a factor that affects workers’ performance assessment, of “Communication is difficult/reduced” (21.3 pp). Therefore, we believe that a decline in performance is likely caused by the existence of a certain number of workers who cannot switch on and off from work or concentrate due to the merging of private space and workspace at home as they cannot create a work environment. Although telework is currently synonymous with working from home, we assume that more workers will be able to demonstrate high performance when teleworking by using satellite offices, which offer the necessary facilities for a place of work.

Figure 22: Dissatisfaction with Working from Home (By Assessment of Performance)

	Declined (n=597) (%)	Improved (n=303) (%)	"Declined" – "Improved" (points)
<u>Difficult to switch on and off from work</u>	57.0%	32.0%	25.0
<u>Difficult to concentrate, prone to distraction</u>	35.5%	12.9%	22.6
<u>Communication is difficult/reduced</u>	52.3%	31.0%	21.3
<u>Lack of space or appliances suited for work</u>	36.9%	21.8%	15.1
Lack of equipment such as monitor or photocopier	35.7%	26.7%	9.0
Feel loneliness	16.6%	9.2%	7.4
Difficult to manage subordinates	16.2%	10.6%	5.6
Lack of understanding of family, cannot concentrate when family is around	13.7%	8.6%	5.1
House is too small	24.8%	21.5%	3.3
Unstable/slow communications environment or network connection	27.3%	24.1%	3.2
Prone to lack exercise or become unhealthy	56.1%	53.8%	2.3
Work results are difficult to be evaluated	13.1%	10.9%	2.2
Burden of cost (for utility, communications, etc.)	28.3%	30.0%	-1.7
Prone to work long hours	18.6%	20.8%	-2.2
Other	0.7%	0.7%	0.0
None applies	5.5%	13.2%	-7.7

(Workers with work-from-home experience whose performance changed by teleworking; MA)

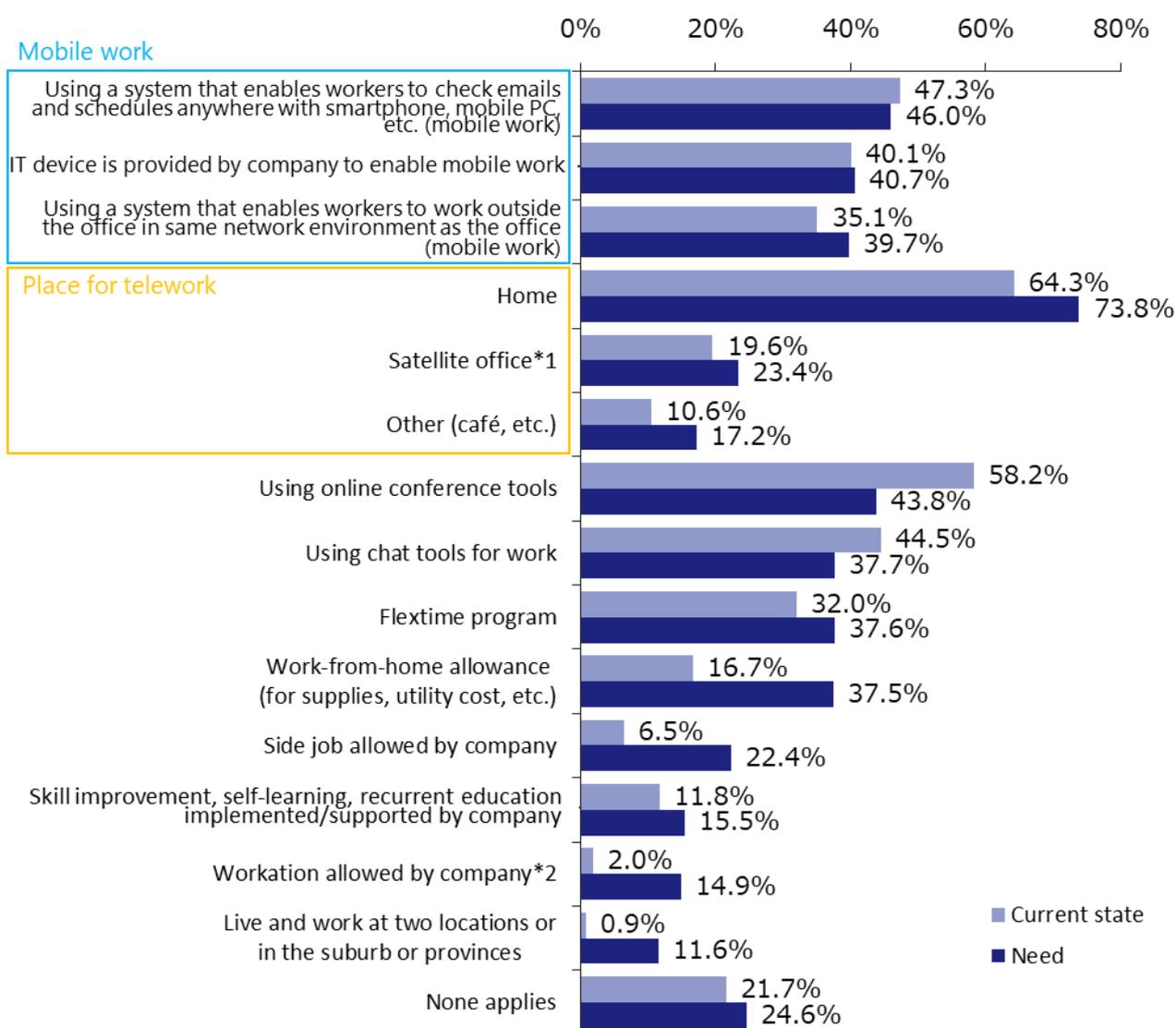
4. Work styles after the COVID-19 pandemic

4.1. Intention to telework after the pandemic

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

We asked respondents which work style initiative they wanted to use or implement after the pandemic has abated and found that the need outweighed the current state in all initiatives related to the place for telework, which, as a result, is expected to continue to expand (**Figure 23**). There were also strong needs for more advanced initiatives, including “Work-from-home allowance (for supplies, utility cost, etc.)” (37.5%), “Side job allowed by company” (22.4%), “Workation allowed by company” (14.9%), and “Live and work at two locations or in the suburb or provinces” (11.6%).

Figure 23: Needs in Work Style Initiatives

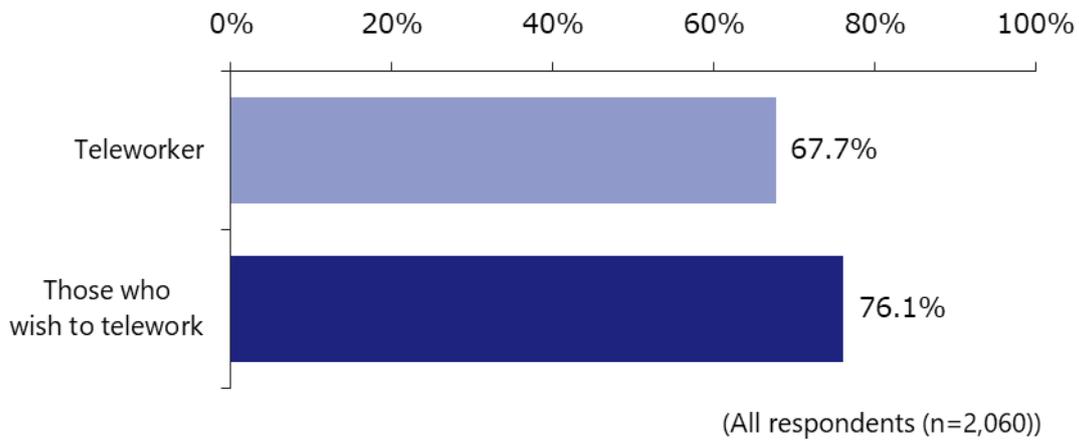


(All respondents (n=2,060); MA)

*1 Satellite office: A collective term that refers to workplaces provided for telework apart from the main office or the homes of workers.
 *2 Workation: A portmanteau of working vacation, meaning to work from a travel destination, etc.

Figure 24 shows the percentage of those who currently telework (“teleworkers”) (**Figure 1**) and that of those who wish to use any of the initiatives related to the place for telework (“those who wish to telework”). The percentage of those who wish to telework as a future work style was 76.1%, greater than the current percentage of teleworkers. This suggests that a further proliferation of telework is still desired even after its rapid spread.

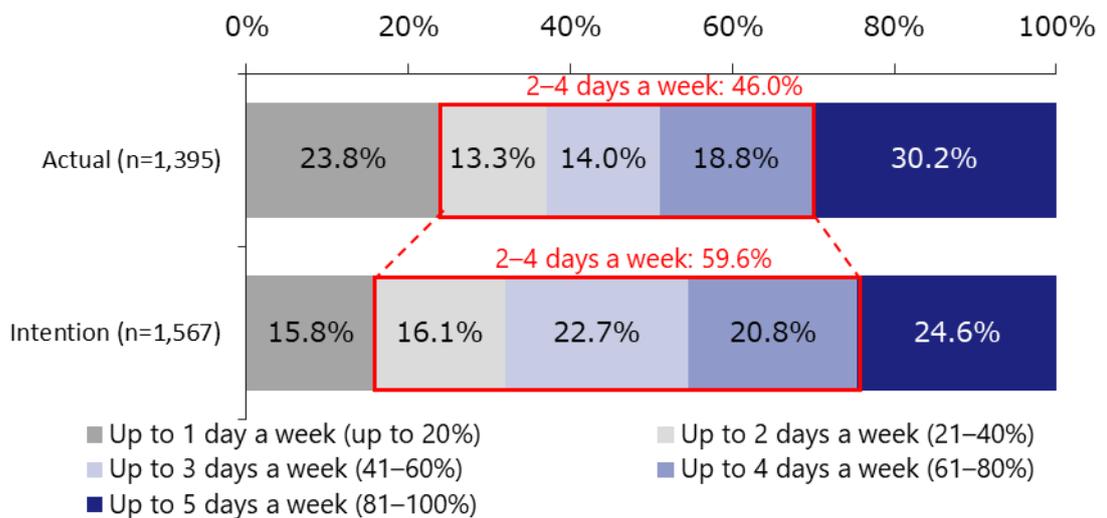
Figure 24: Current Usage of and Need for Telework



When we asked those who wished to telework how much time they wanted to allocate to teleworking, the percentage of those who wished for extreme time allocations of “Up to 1 day a week (up to 20%)” and “Up to 5 days a week (81–100%)” was smaller than the actual percentage of such allocation of time, while the percentage of “2–4 days a week (21–80%)” was larger than the actual state (**Figure 25**).

Of the workers that wished to telework “up to 5 days a week (81–100%),” those who wanted to telework “100%,” i.e., full-time, accounted for only around 10% of all workers who wished to telework. The need for offices as a place for work is likely to remain even if telework spread further going forward.

Figure 25: Frequency of Telework <Actual and Intention>

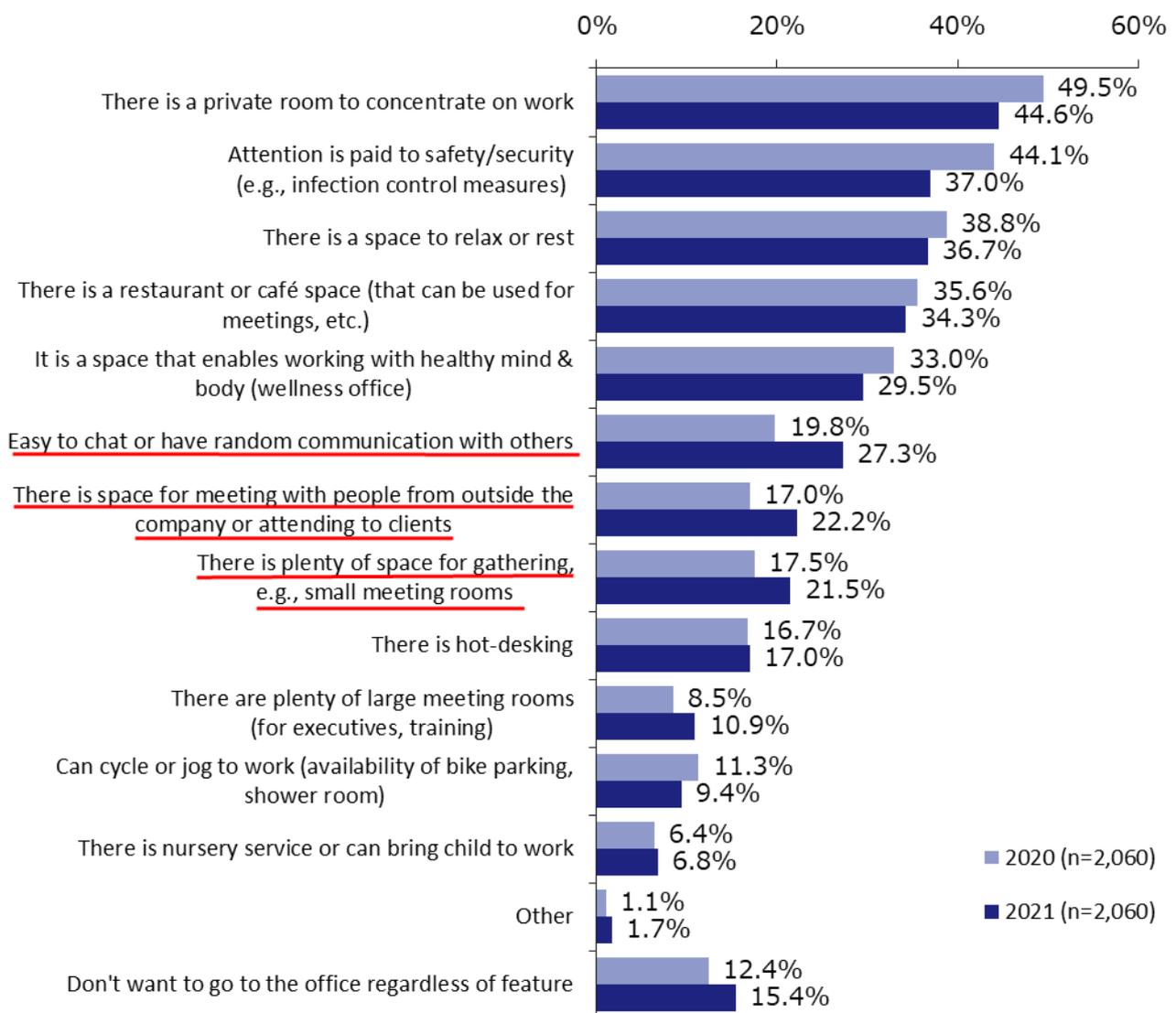


([Actual] Teleworkers; [Intention] Those who wish to telework)

4.2. Place of work after the COVID-19 pandemic

As we have examined thus far, many workers are likely to come to the office in addition to teleworking after the pandemic has abated. Thus, we asked respondents what kind of office they wanted to come to 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 (44.6%) was one that had a private room where they can concentrate on work (**Figure 26**). This was followed by “Attention is paid to safety/security (e.g., infection control measures)” (37.0%), “There is a space to relax or rest” (36.7%), “There is a restaurant or café space (that can be used for meetings, etc.)” (34.3%), and “It is a space that enables working with healthy mind & body (wellness office)” (29.5%), but the percentages all dropped from the 2020 survey. Meanwhile, more respondents required features for meeting and congregating with people, as seen in the 7.5-pp increase in “Easy to chat or have random communication with others” (27.3%). Although private rooms for concentrating are still required, workers seem to have begun to find value in the office’s role as a place for communication that makes up for the issues of telework.

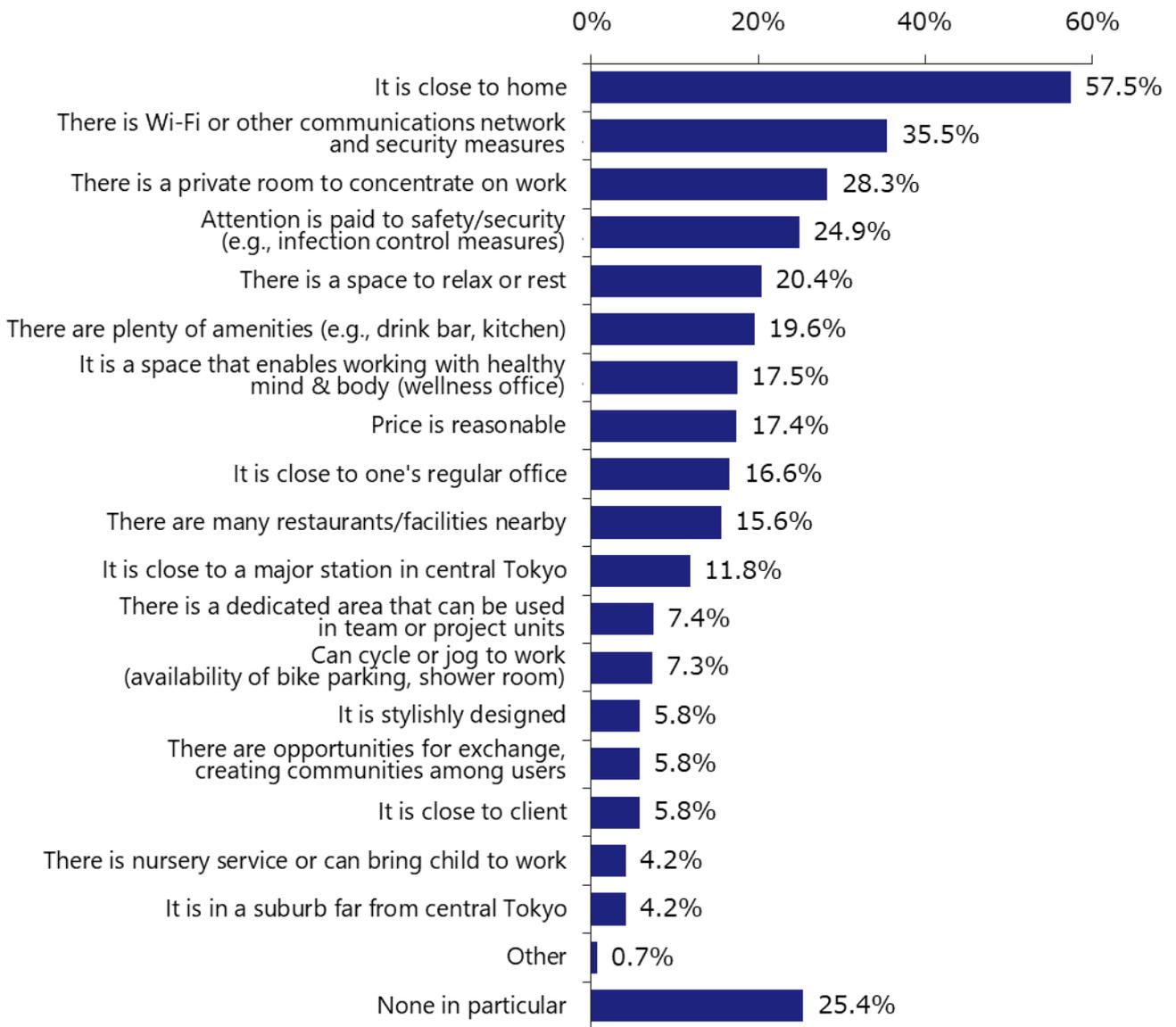
Figure 26: Features of Offices Workers Want to Come to Work in



(All respondents; MA)

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” (57.5%), which far outstripped the second most important feature (**Figure 27**). As we saw in **Figure 12**, the reduction in commuting and travel time appears to be a major benefit for workers. As in the features required in an office, “There is a private room to concentrate on work” (28.3%) ranked high, indicating that a diverse range of features are expected in a satellite office.

Figure 27: Important Features when Using a Satellite Office



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

5. Summary

In this report, we examined how the work styles of office workers in Greater Tokyo have changed over the 18 months since the outbreak of the COVID-19 pandemic and considered their work styles going forward by examining their needs.

Telework, which spread rapidly as a result of the outbreak of the pandemic in 2020, continued to be implemented at the time of this survey (September 2021), with teleworkers accounting for roughly 70% of all respondents. We assume that the percentage of teleworkers was larger due in part to the fact that a state of emergency was declared when this survey was conducted. Furthermore, secondary initiatives that were not in place last year have gradually spread, as seen in the doubling of the implementation rate of work-from-home allowances, suggesting that telework is taking root on a full scale.

At the same time, we found that many workers felt dissatisfaction with working from home, which currently is the main place of telework. Those dissatisfactions included “Prone to lack exercise or become unhealthy” and “Difficult to switch on and off from work.” We also found that workers still lacked a satisfactory work environment despite the rapid spread of working from home due to the outbreak of the COVID-19 pandemic, since the home is nothing more than a place for daily life. Although some of the dissatisfactions with working from home, such as those related to the work environment, can be removed by using a satellite office, we believe that quite a few workers are forced to work from home without having been able to resolve their dissatisfaction, as telework is currently synonymous with working from home. Since teleworkers who rated their current performance as being lower than when working only in the office tended to be dissatisfied with the work environment in their home, an improvement in performance can be expected by working in a satellite office, which many workers have the impression of being easier to concentrate than when working from home.

In terms of the implementation ratio of telework, while currently a large percentage of workers teleworked at an extreme frequency of “Up to 1 day a week” or “Up to 5 days a week,” more workers intended to telework for “Up to 2–4 days a week” going forward, indicating a gap between the current situation and future intention.

Although we have gotten used to telework after some time has passed since it began to spread, it remains difficult to determine the optimal work style under an extraordinary situation such as the COVID-19 pandemic. Xymax REI will continue to conduct company surveys and worker surveys in parallel to capture the changes in the trend of work styles and workplaces amid the situation that changes with every moment.

Survey Overview

Survey period	September 2021
Target respondents	(1) Screening: 5,000 men and women aged 18 and above (2) Main survey: Those 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/technical, clerical or sales, whose regular office was located in Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures), and whose current and pre-COVID-19 pandemic principal workplace was the office or home.
Number of valid answers	2,060
Geographical coverage	Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures)
Survey method	Online

Attributes of Respondents

		%	n			%	n		
Gender and age	Male aged 20-29	2.5%	51	Number of employees of company	1-9	6.9%	142		
	Male aged 30-39	9.2%	190		10-49	11.8%	243		
	Male aged 40-49	19.5%	401		50-99	8.9%	183		
	Male aged 50-59	25.2%	519		100-299	14.1%	291		
	Male aged 60 or older	12.4%	256		300-999	15.1%	312		
	(Male total)	68.8%	1,417		1,000-2,999	13.1%	270		
	Female aged 20-29	6.3%	130		3,000 or more	27.2%	561		
	Female aged 30-39	10.3%	212		Don't know	2.8%	58		
	Female aged 40-49	8.9%	184		Industry	Manufacturing	20.2%	417	
	Female aged 50-59	4.8%	99			Information & communications	16.5%	340	
	Female aged 60 or older	0.9%	18			Finance & insurance	10.8%	222	
	(Female total)	31.2%	643			Services, N.E.C.	10.7%	221	
	Job category	Sales	23.6%			486	Wholesale & retail trade	9.7%	199
		Technical specialist	20.5%			422	Real estate & goods rental and leasing	5.4%	111
General office work/reception/secretary		19.6%	404	Construction		5.4%	111		
Admin/HR/accounting		16.4%	337	Other & industries unable to classify		4.0%	82		
Corporate planning		10.7%	221	Scientific research, professional & technical services		3.9%	81		
Creative specialist		2.4%	50	Transport & postal activities		3.9%	80		
Clerical specialist		2.2%	46	Education, learning support		2.4%	50		
Other		4.6%	94	Medical, health care & welfare		1.7%	36		
Form of employment		Officer of company/organization	8.3%	170		Electricity, gas, heat supply and water	1.7%	34	
	Staff of company/organization (management)	23.4%	483	Living-related and personal services & amusement services		1.2%	25		
	Staff of company/organization (Regular staff other than management)	55.4%	1,142	Compound services	1.0%	20			
	Staff of company/organization (Other than regular staff)	12.9%	265	Government, except elsewhere classified	0.8%	17			
				Accommodations, eating & drinking	0.6%	13			
			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%.

For further inquiries please contact below:

Xymax Real Estate Institute

<https://soken.xymax.co.jp> | E-MAIL: info-rei@xymax.co.jp