

# Metropolitan Areas Office Worker Survey 2023 (1) Work Style Reality and Needs <Detailed Report>

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Capturing changes in workers' work styles and values

December 13, 2023

**Xymax Real Estate Institute**

# Survey Overview

Japan is transitioning to a post-COVID state as it downgraded the categorization of COVID-19 under the Infectious Disease Law to Class 5 in May 2023.

To capture changes in work styles and the workplace from the perspectives of both companies and office workers, Xymax Real Estate Institute (“Xymax REI”) has conducted a total of 14 Metropolitan Areas Office Demand Surveys of companies since autumn 2016 and seven Greater Tokyo Office Worker Surveys of office workers since the end of 2016. This 8th office worker survey was conducted in October 2023 with the addition of regional cities in the survey’s geographical coverage. This report is an excerpt of the results of the survey concerning the reality and needs in work styles. “(2) Evaluation of Work Styles,” released on the same day, summarizes the results of an analysis of workers’ evaluation of their current work styles.

\*1 *Metropolitan Areas Office Worker Survey 2023 (2) Evaluation of Work Styles*, released on December 13, 2023

[https://www.xymax.co.jp/english/research/images/pdf/20231213\\_2.pdf](https://www.xymax.co.jp/english/research/images/pdf/20231213_2.pdf)

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

## <Related survey>

• Greater Tokyo Office Worker Survey 2022, released on November 30, 2022

<https://www.xymax.co.jp/english/research/images/pdf/20221130.pdf>

<b>Survey period</b>	October 2023
<b>Target respondents</b>	(1) Screening: Men and women between the ages of 20 and 69 whose occupation is company manager/executive or company employee and who live in the areas covered by the survey. (2) Main survey: Those who answered in the screening that their occupation was either an officer or staff of a company or organization whose job category was managerial, specialized/technical, clerical or sales and whose regular office was located in Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures), Osaka City, Nagoya City or Fukuoka City, whose residence was in Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures), or Gifu, Aichi, Mie, Shiga, Kyoto, Osaka, Hyogo, Nara, Wakayama, Fukuoka or Saga prefectures and whose current principal workplace was the office or home.
<b>Number of valid answers</b>	4,120 Allocated according to the location of the respondent’s regular office. (Greater Tokyo: 2,060; Osaka City: 1,030; Nagoya City: 515; Fukuoka City: 515)
<b>Geographical coverage</b>	Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures) and Gifu, Aichi, Mie, Shiga, Kyoto, Osaka, Hyogo, Nara, Wakayama, Fukuoka and Saga prefectures
<b>Survey method</b>	Online

# Survey Overview

## Attributes of Respondents: Greater Tokyo (n=2,060)

		%	n			%	n			%	n
Gender and age	Male aged 20-29	2.0%	42	Number of employees of company	1-9	9.3%	191	Sector	Manufacturing	20.9%	431
	Male aged 30-39	6.5%	133		10-49	12.6%	259		Information & communications	16.9%	349
	Male aged 40-49	16.1%	332		50-99	8.0%	164		Finance & insurance	10.2%	210
	Male aged 50-59	25.9%	533		100-299	14.2%	293		Wholesale & retail trade	9.8%	201
	Male aged 60 or older	15.5%	320		300-999	15.0%	308		Services, N.E.C.	8.9%	183
	(Male total)	66.0%	1,360		1,000-2,999	11.7%	240		Construction	6.3%	129
	Female aged 20-29	5.7%	118		3,000 or more	26.7%	551		Real estate & goods rental and leasing	6.1%	126
	Female aged 30-39	9.6%	198		Don't know	2.6%	54		Scientific research, professional & technical services	4.3%	88
	Female aged 40-49	8.8%	182		General office work/reception/secretary	23.1%	475		Transport & postal activities	3.8%	78
	Female aged 50-59	8.1%	167		Sales	20.3%	418		Education, learning support	2.1%	43
Female aged 60 or older	1.7%	35	Admin/HR/accounting	18.7%	386	Medical, health care & welfare	2.0%		42		
(Female total)	34.0%	700	Technical specialist	19.0%	392	Electricity, gas, heat supply and water	1.6%		33		
Form of employment	Officer of company/organization	8.7%	179	Corporate planning	8.9%	184	Compound services		1.4%	28	
	Staff of company/organization (management)	25.3%	522	Creative specialist	2.3%	47	Living-related and personal services & amusement services		0.9%	18	
	Staff of company/organization (Full-time staff other than management)	51.1%	1,053	Clerical specialist	2.0%	41	Government, except elsewhere classified		0.8%	17	
	Staff of company/organization (Other than full-time staff)	14.9%	306	Other	5.7%	117	Accommodations, eating & drinking services		0.4%	9	
							Agriculture and forestry		0.0%	1	
						Mining and quarrying of stone and gravel	0.0%		1		
						Other & industries unable to classify	3.5%		73		

# Survey Overview

## Attributes of Respondents: Osaka City (n=1,030)

		%	n			%	n			%	n
Gender and age	Male aged 20-29	1.9%	20	Number of employees of company	1–9	9.9%	102	Sector	Manufacturing	21.6%	222
	Male aged 30-39	5.6%	58		10–49	16.6%	171		Information & communications	13.7%	141
	Male aged 40-49	12.7%	131		50–99	8.8%	91		Wholesale & retail trade	16.4%	169
	Male aged 50-59	25.1%	259		100–299	14.0%	144		Services, N.E.C.	8.2%	84
	Male aged 60 or older	15.6%	161		300–999	16.5%	170		Construction	8.1%	83
	(Male total)	60.9%	629		1,000–2,999	10.5%	108		Finance & insurance	7.5%	77
	Female aged 20-29	4.6%	47		3,000 or more	20.5%	211		Real estate & goods rental and leasing	5.2%	54
	Female aged 30-39	11.9%	123		Don't know	3.2%	33		Scientific research, professional & technical services	4.3%	44
	Female aged 40-49	11.5%	118		General office work/reception/secretary	25.5%	263		Transport & postal activities	2.7%	28
	Female aged 50-59	9.3%	96		Sales	24.4%	251		Medical, health care & welfare	2.6%	27
Female aged 60 or older	1.7%	17	Admin/HR/accounting	20.5%	211	Compound services	1.6%		16		
(Female total)	39.0%	401	Technical specialist	15.7%	162	Education, learning support	1.4%		14		
Form of employment	Officer of company/organization	8.3%	86	Job category	Corporate planning	7.2%	74		Living-related and personal services & amusement services	1.4%	14
	Staff of company/organization (management)	22.2%	229		Creative specialist	1.6%	16		Electricity, gas, heat supply and water	1.3%	13
	Staff of company/organization (Full-time staff other than management)	52.0%	536		Clerical specialist	1.7%	17		Accommodations, eating & drinking services	1.1%	11
	Staff of company/organization (Other than full-time staff)	17.4%	179		Other	3.5%	36		Government, except elsewhere classified	0.3%	3
									Agriculture and forestry	0.2%	2
						Other & industries unable to classify	2.7%		28		

# Survey Overview

## Attributes of Respondents: Nagoya City (n=515)

			%	n				%	n				%	n	
Gender and age	Male aged 20-29		3.1%	16	Number of employees of company	1-9		5.8%	30	Sector	Manufacturing		27.2%	140	
	Male aged 30-39		11.8%	61		10-49		12.4%	64		Wholesale & retail trade		16.3%	84	
	Male aged 40-49		16.9%	87		50-99		8.7%	45		Information & communications		12.6%	65	
	Male aged 50-59		22.1%	114		100-299		14.4%	74		Construction		8.5%	44	
	Male aged 60 or older		14.6%	75		300-999		18.4%	95		Services, N.E.C.		7.6%	39	
	(Male total)		68.5%	353		1,000-2,999		13.0%	67		Finance & insurance		7.2%	37	
	Female aged 20-29		5.2%	27		3,000 or more		25.2%	130		Real estate & goods rental and leasing		3.9%	20	
	Female aged 30-39		11.1%	57		Don't know		1.9%	10		Transport & postal activities		3.9%	20	
	Female aged 40-49		7.4%	38		Job category	General office work/reception/secretary		22.9%		118	Scientific research, professional & technical services		3.1%	16
	Female aged 50-59		6.6%	34			Sales		26.4%		136	Medical, health care & welfare		2.5%	13
Female aged 60 or older		1.2%	6	Admin/HR/accounting			19.8%	102	Electricity, gas, heat supply and water		1.9%	10			
(Female total)		31.5%	162	Technical specialist			18.4%	95	Education, learning support		1.0%	5			
Form of employment	Officer of company/organization		8.0%	41	Corporate planning			6.4%	33	Compound services		1.0%	5		
	Staff of company/organization (management)		25.8%	133	Creative specialist			1.7%	9	Accommodations, eating & drinking services		1.0%	5		
	Staff of company/organization (Full-time staff other than management)		52.6%	271	Clerical specialist		1.4%	7	Living-related and personal services & amusement services		0.8%	4			
	Staff of company/organization (Other than full-time staff)		13.6%	70	Other		2.9%	15	Government, except elsewhere classified		0.6%	3			
									Other & industries unable to classify		1.0%	5			

# Survey Overview

## Attributes of Respondents: Fukuoka City (n=515)

		%	n			%	n			%	n
Gender and age	Male aged 20-29	2.9%	15	Number of employees of company	1-9	10.5%	54	Sector	Information & communications	15.3%	79
	Male aged 30-39	10.5%	54		10-49	12.8%	66		Wholesale & retail trade	13.2%	68
	Male aged 40-49	15.1%	78		50-99	10.5%	54		Manufacturing	11.5%	59
	Male aged 50-59	18.4%	95		100-299	13.6%	70		Finance & insurance	11.1%	57
	Male aged 60 or older	14.0%	72		300-999	15.1%	78		Services, N.E.C.	10.3%	53
	(Male total)	60.9%	314		1,000-2,999	11.7%	60		Construction	8.3%	43
	Female aged 20-29	7.0%	36		3,000 or more	21.4%	110		Electricity, gas, heat supply and water	4.7%	24
	Female aged 30-39	9.7%	50		Don't know	4.5%	23		Real estate & goods rental and leasing	4.3%	22
	Female aged 40-49	12.4%	64		General office work/reception/secretary	28.5%	147		Medical, health care & welfare	4.1%	21
	Female aged 50-59	9.3%	48		Sales	25.6%	132		Scientific research, professional & technical services	3.7%	19
Female aged 60 or older	0.6%	3	Admin/HR/accounting	18.1%	93	Compound services	2.3%		12		
(Female total)	39.0%	201	Technical specialist	16.5%	85	Transport & postal activities	1.9%		10		
Form of employment	Officer of company/organization	8.7%	45	Job category	Corporate planning	4.5%	23		Living-related and personal services & amusement services	1.7%	9
	Staff of company/organization (management)	22.9%	118		Creative specialist	1.4%	7		Education, learning support	1.4%	7
	Staff of company/organization (Full-time staff other than management)	48.0%	247		Clerical specialist	0.8%	4		Government, except elsewhere classified	0.8%	4
	Staff of company/organization (Other than full-time staff)	20.4%	105		Other	4.7%	24		Accommodations, eating & drinking services	0.8%	4
									Mining and quarrying of stone and gravel	0.4%	2
									Agriculture and forestry	0.2%	1
									Other & industries unable to classify	4.1%	21

## 1. Reality of Work Styles (from p.8)

- The office location with the highest percentage of “teleworkers,” i.e., those who teleworked for any length of time at the time of the survey, was Greater Tokyo at 51.4%. However, compared to previous surveys, the percentage is declining after peaking in 2021.
- In terms of the percentage of time spent at the place of work during the pandemic and now, the percentage of time working in the respondents’ “regular office” increased by 7–8 percentage points, irrespective of the region. Workers who replied that their frequency of coming to the office had increased between during the pandemic and now accounted for more than 20% in all regions. In each of these regions, the percentage of “Increased” exceeded that of “Decreased” in terms of the frequency of coming to the office.

## 2. Needs in Work Styles (from p.18)

- A comparison of the current use and the need for work style initiatives indicates a large gap between current use and the need in “work-from-home allowances” and relatively advanced initiatives that are not currently highly used, such as “side job allowed by employer,” “workation allowed by employer” and “live and work at two locations; move to and work from suburb or countryside,” in all areas.
- A comparison of the current use and the need for layouts in the respondents’ regular office shows a large gap between current use and the need in “canteen, café space,” “space for refreshing” and “space for concentrating,” irrespective of the area, indicating that availability has not kept pace with workers’ needs.

# 1. Reality of Work Styles

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1. Commute
2. Work Style Initiatives
3. Telework, Frequency of Coming to the Office
4. Office Layouts

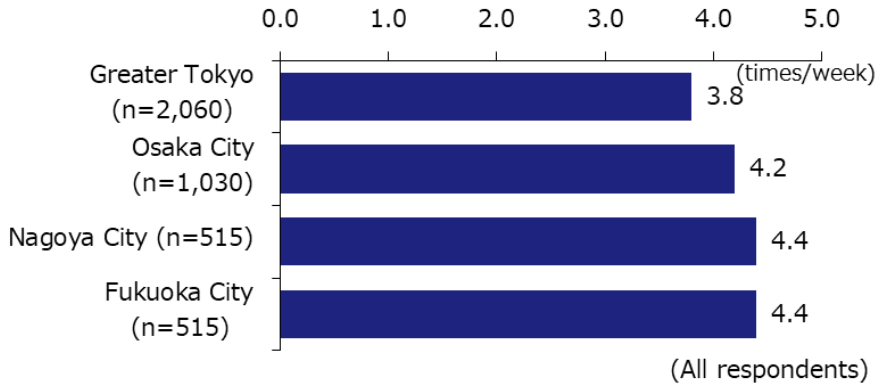


# Workers in Greater Tokyo commute to the office an average of 3.8 times per week

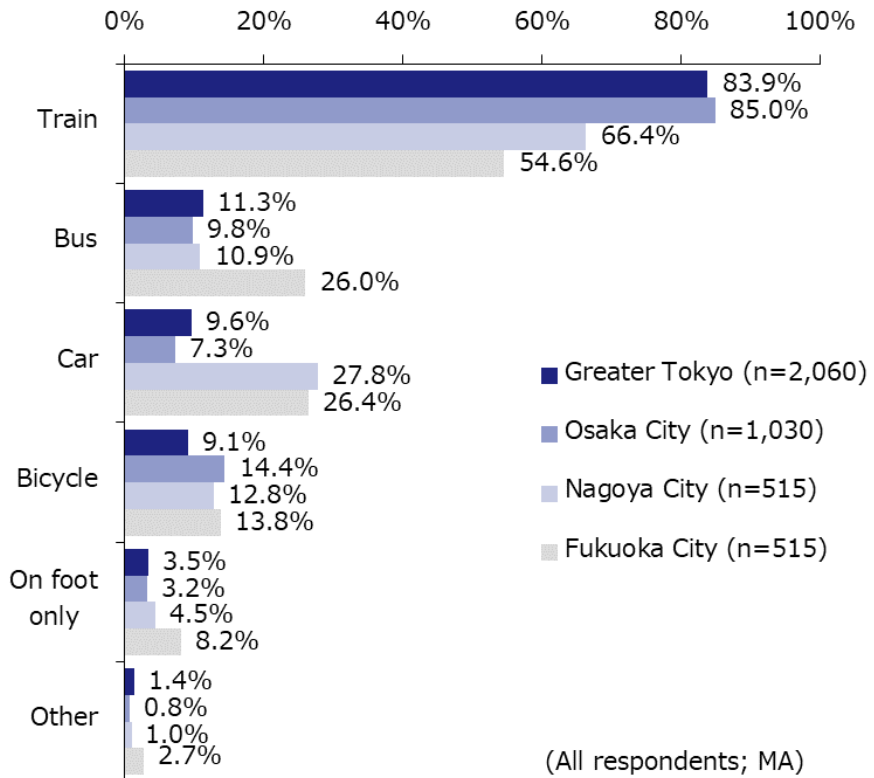
Figure 1 shows workers' average weekly commute frequency to their regular office by office location. It indicates that workers commuting to offices in Greater Tokyo come to the office the least frequently (an average of 3.8 times per week), suggesting that they telework outside of their regular office more frequently than workers in other regions.

In terms of the commuting method, more than 80% of workers in Greater Tokyo (83.9%) and Osaka City (85.0%) commute by train (Figure 2). Workers in Nagoya City and Fukuoka City notably commute by car or bus, as their use of trains is low.

**Figure 1: Commute Frequency – By Office Location**



**Figure 2: Commuting Method – By Office Location**

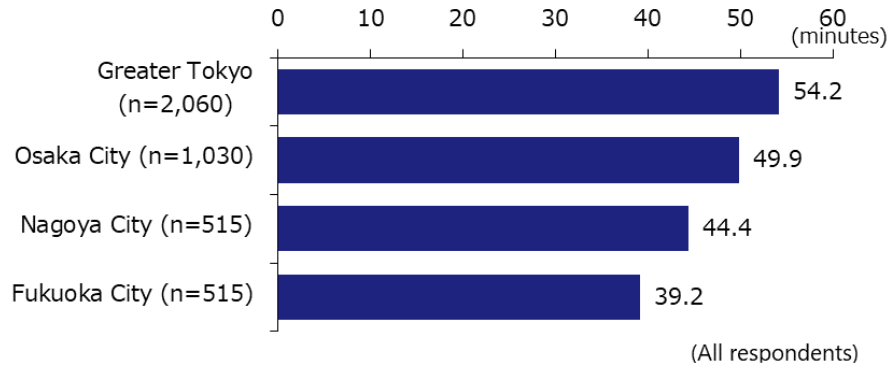


# Workers in Greater Tokyo have longer commutes and higher commuting stress

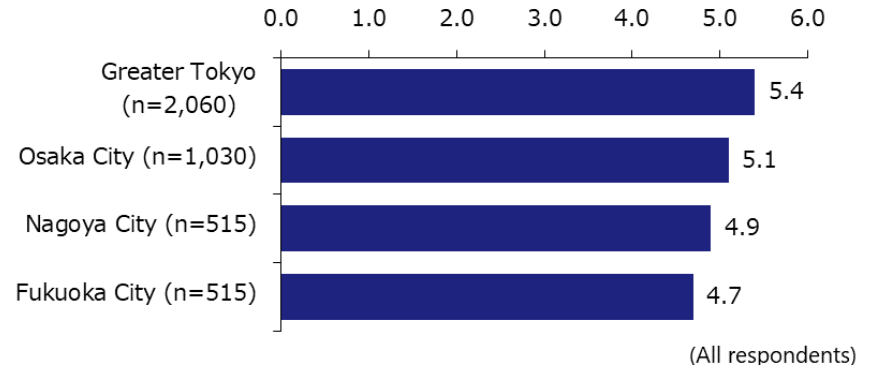
The commute time (door-to-door, one-way) using respondents' usual commuting method was the longest among workers in Greater Tokyo at 54.2 minutes (Figure 3).

When we asked respondents to rate the stress they usually experience while commuting on an 11-point scale from 0 (low stress) to 10 (high stress), the average score was 5.4 in Greater Tokyo and 5.1 in Osaka City, indicating that commuting stress is higher in regions where commuting times are longer (Figure 4).

**Figure 3: Commuting Time – By Office Location**



**Figure 4: Commuting Stress – By Office Location**

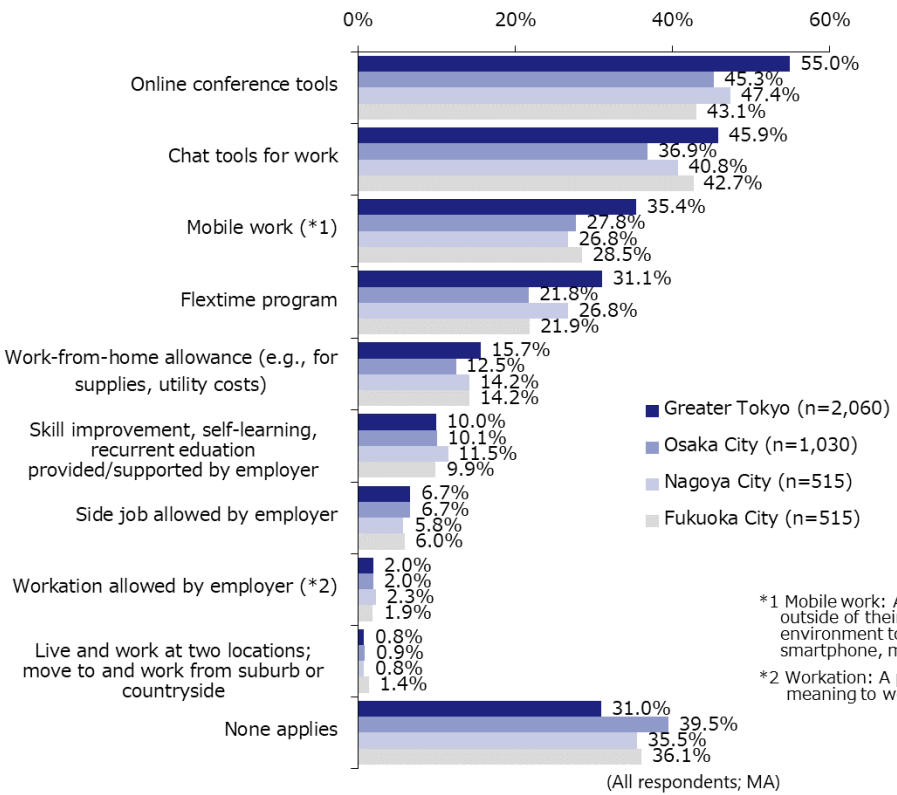


# “Online conference tools” are the most common work style initiative across all regions

When we asked respondents about the work style initiative that was currently used or implemented, “online conference tools” were the most common in all regions (Figure 5). Tools and work styles that are introduced in association with the implementation of telework, such as “online conference tools,” “chat tools for work” and “mobile work,” tend to be adopted at a higher rate in Greater Tokyo than in regional cities.

There was no large difference between Greater Tokyo and regional cities in the initiatives with lower adoption rates in general, such as “skill improvement, self-learning, recurrent education provided/supported by employer” and “side job allowed by employer.”

**Figure 5: Adoption of Work Style Initiatives – By Office Location**



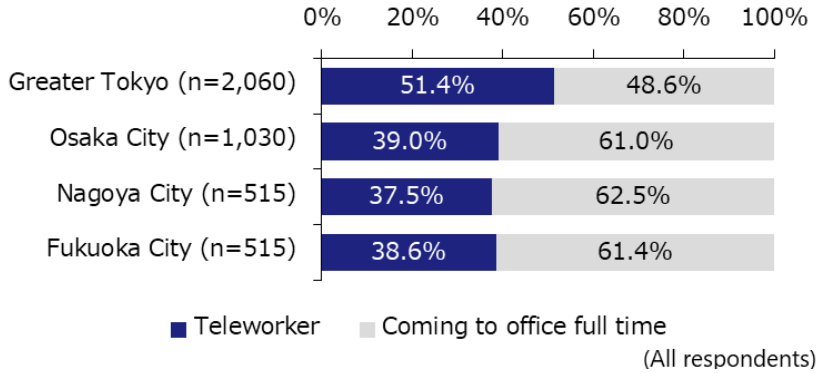
\*1 Mobile work: A work style that allows workers to work outside of their designated office in a similar network environment to the office anytime, anywhere using a smartphone, mobile PC or other device.  
 \*2 Workation: A portmanteau of working vacation, meaning to work from a travel destination, etc.

# Teleworkers account for the majority in Greater Tokyo, but their percentage is declining

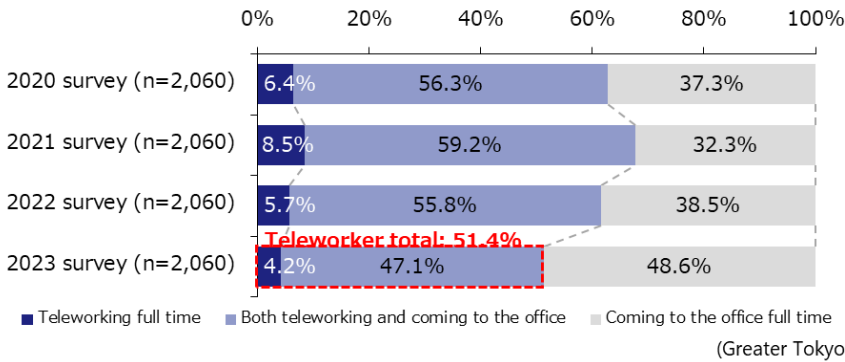
Figure 6 summarizes the percentage of "teleworkers," i.e., those who teleworked for any length of time at the time of the survey. Teleworkers account for more than half (51.4%) in Greater Tokyo, where the teleworker percentage is the largest. Teleworkers also account for about 40% in regional cities.

Compared to previous surveys on the telework situation in Greater Tokyo, we found that the percentage of teleworkers has been declining since peaking in the 2021 survey (Figure 7). The figure also shows that workers who telework full time only account for 4.2% of the total, with the majority being teleworkers engaged in "hybrid work," which is to combine teleworking and coming to the office.

**Figure 6: Percentage of Teleworkers – By Office Location**



**Figure 7: Coming to the Office or Teleworking (Greater Tokyo, Comparison over Time)**



# Greater Tokyo has a larger proportion of teleworkers working “only from home” than regional cities

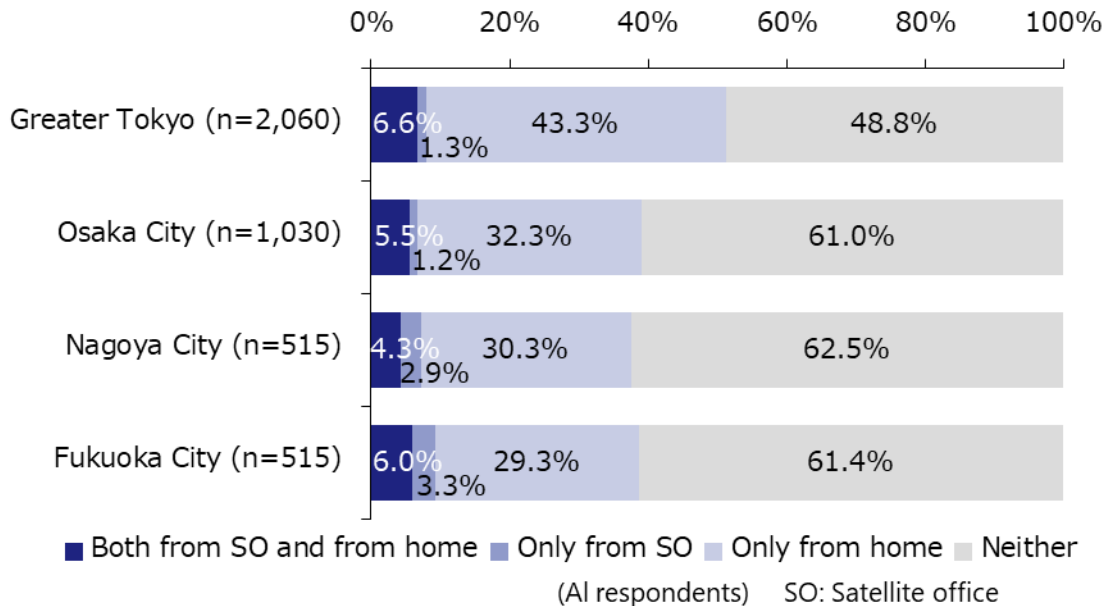
**Figure 8: Implementation Rate of Initiatives on the Place for Telework – By Office Location**

An examination of the use of a satellite office\*1 and home for teleworking\*2 shows that the percentage of workers who telework “only from home” (43.3%) is more than 10 percentage points higher in Greater Tokyo than in regional cities (Figure 8).

The percentage of working from a satellite office (the sum of “Both from SO and home” and “Only from SO”) was roughly the same in regional cities and Greater Tokyo, where teleworking is more common.

\*1 Satellite office: A collective term for workplaces provided for telework apart from the worker’s regular office or home.

\*2 The answers were grouped into “Implementing both working from a satellite office and working from home,” “Working only from a satellite office,” “Working only from home” and “Neither.” The use of “Telework from other locations” is not relevant.



### 1.3. Telework, Frequency of Coming to the Office

## The use of the telework support type is popular in all regions. Its positioning may vary depending on the region.

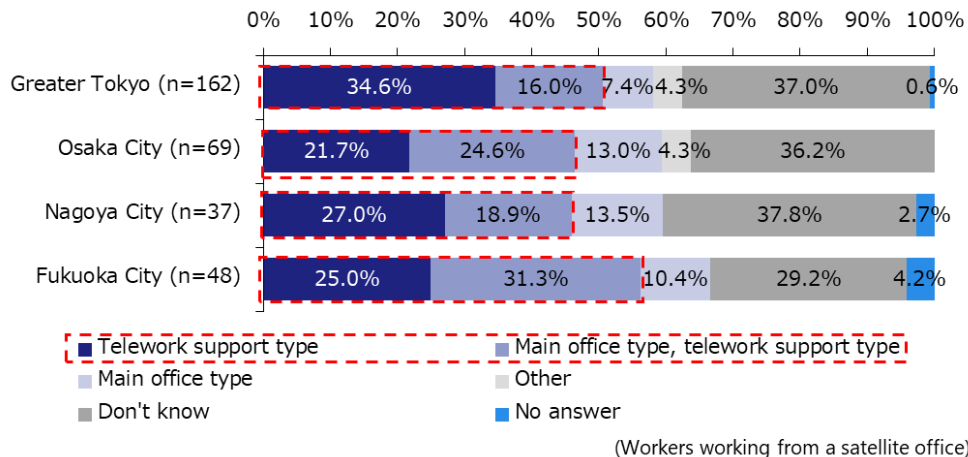
We asked workers who use a satellite office about the specific brand they use and classified them into the “main office type” and “telework support type”\* (Figure 9).

In all regions, around half of satellite office users use the “telework support type” of satellite offices.

On the other hand, the percentage of using the “main office type” of satellite offices (the sum of “Main office type, telework support type” and “Main office type”) is higher in regional cities than in Greater Tokyo. Satellite offices in regional cities may be used more as the main place of work, such as a sales office, than as a place for teleworking.

\*Classified based on the concept in [Classification of Flexible Offices by Type](#), released on May 2, 2023.

**Figure 9: Type of Satellite Office Used – By Office Location**

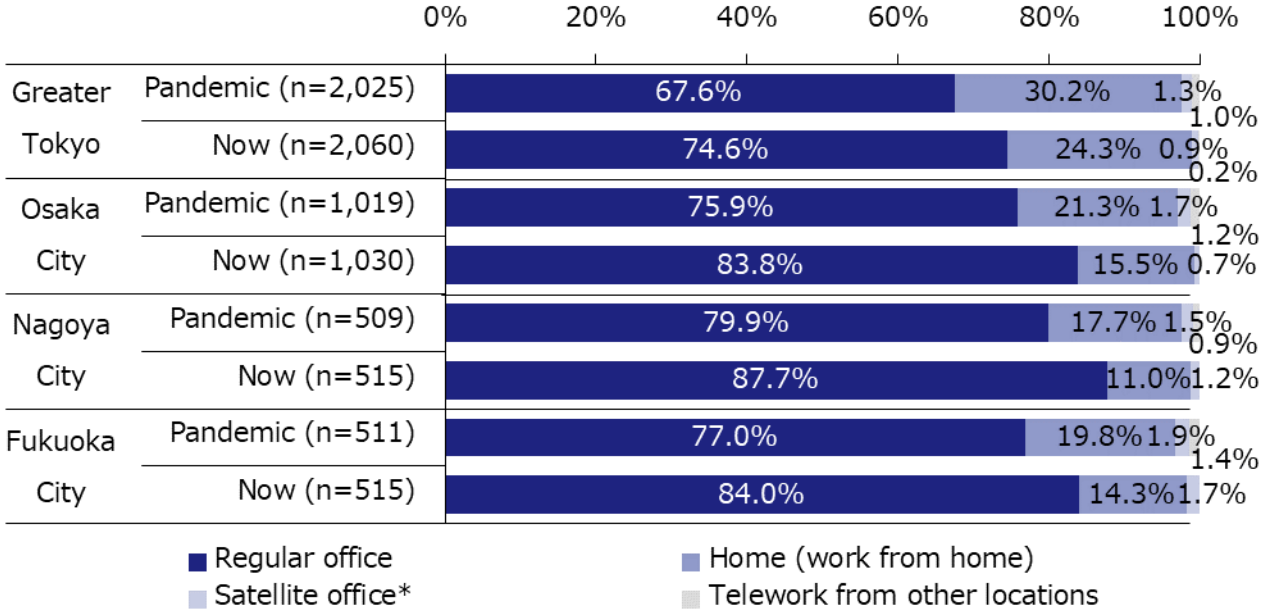


# Proportion of time working in the “regular office” increased 7–8 pt from during the pandemic

**Figure 10: Time Allocated to Each Place of Work During the Pandemic and Now – By Office Location**

We asked respondents how they split their time between each place of work, i.e., their “regular office,” “home (work from home),” “satellite office” and “other locations,” during the COVID-19 pandemic (before the downgrade of COVID-19 to a Class 5 infectious disease) and now.

In all regions, the proportion of time spent working in the respondents’ “regular office” increased by 7–8 percentage points between during the pandemic and now (Figure 10). The figure also shows that most of the time other than working in one’s regular office, i.e., the time spent teleworking, was spent working from home.



([Pandemic]: Excludes workers who were "not working during the COVID-19 pandemic"  
 [Now]: All respondents)

\*Satellite office: A collective term for workplaces provided for telework apart from the worker’s regular office or home.

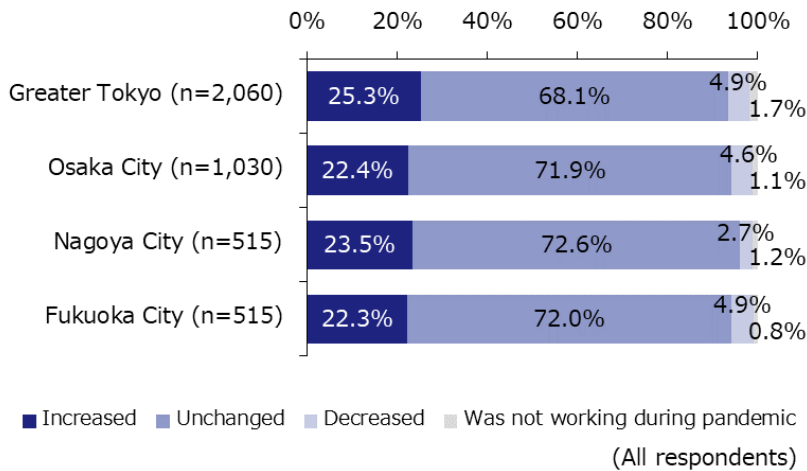
1.3. Telework, Frequency of Coming to the Office

# In all regions, more than 20% of respondents replied that the frequency of coming to the office “increased” with the downgrade of COVID-19 to Class 5

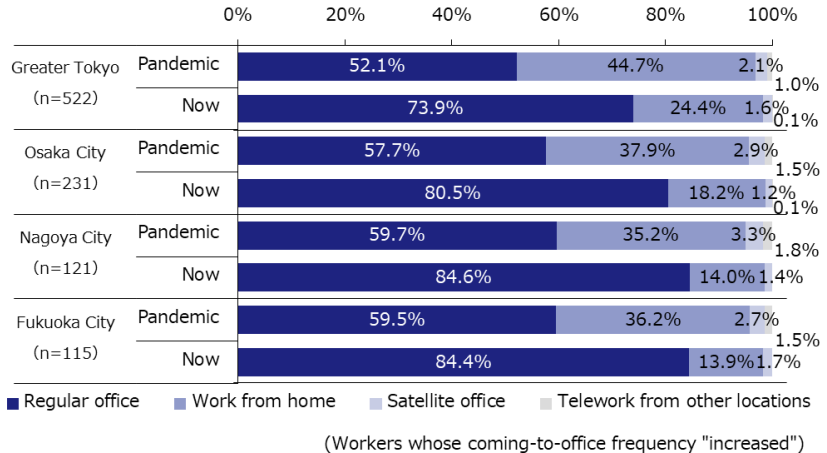
Figure 11 shows the changes in respondents' frequency of coming to the office from during the pandemic to the downgrade of COVID-19 to a Class 5 infectious disease. In all regions, more than 20% of workers saw an increase in their frequency of coming to the office with the downgrade to Class 5, and the percentage of “Increased” exceeded “Decreased.”

How workers with an increased frequency of coming to the office split their time in each place of work during the pandemic and now is shown in Figure 12. In all regions, the percentage of time spent working in one’s regular office has increased by more than 20 percentage points (one day out of five days a week).

**Figure 11: Changes in Frequency of Coming to the Office – By Office Location**



**Figure 12: Time Allocated to Each Place of Work During the Pandemic and Now – By Office Location; Workers Whose Coming-to-office Frequency “Increased”**



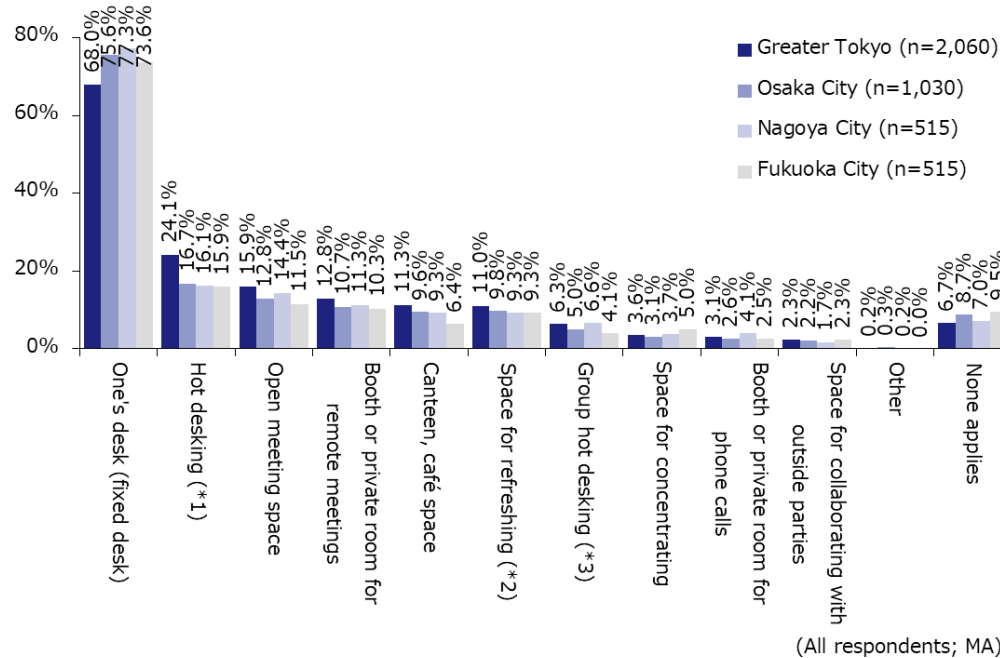


# Hot desking is more widespread in Greater Tokyo than in regional cities

Figure 13 shows the layouts respondents actually use in their regular office.

“Fixed desk” was the most popular in all regions. However, it accounted for less than 70% in Greater Tokyo, where “hot desking” was more widespread than in other regions. Offices appear to be more optimized through hot desking according to the proliferation level of teleworking.

**Figure 13: Utilization of Layouts within the Office – By Office Location**



\*1 Hot desking: Desks that can be chosen by individuals freely

\*2 Space for refreshing: Space provided to refresh the mind and body. It is not only used for resting, but also for improving health or activating communication among employees.

\*3 Group hot desking: Desks within a designated area of the department or team, etc., that can be chosen by individuals freely

## 2. Needs in Work Styles

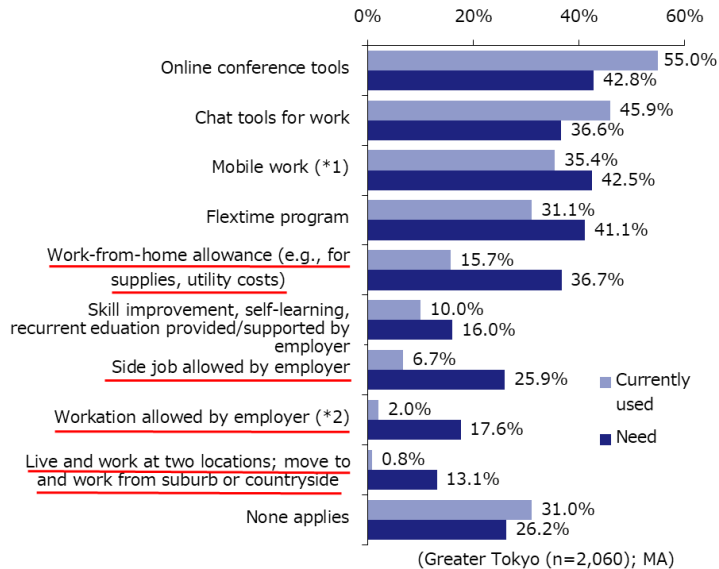
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1. Work Style Initiatives
2. Office Layouts

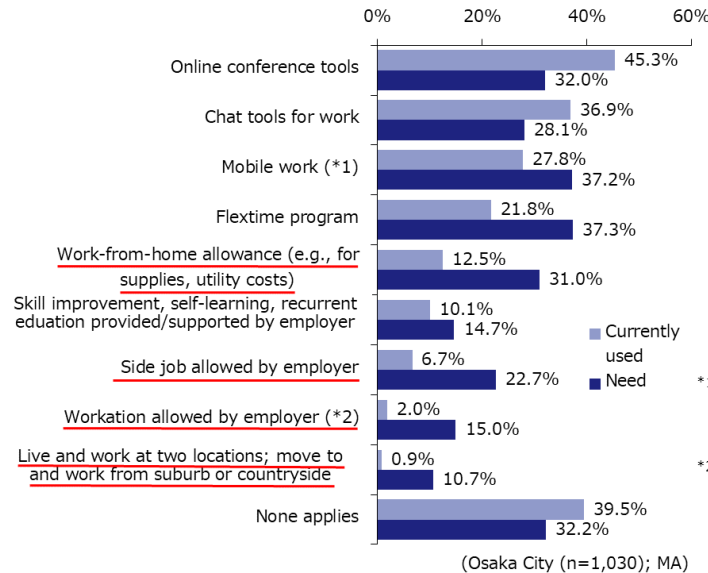
## There is also a need for advanced initiatives such as side jobs and workation

Figures 14 to 17 show the work style initiatives currently being used or implemented (“currently used,” Figure 5) and the initiatives respondents wish to use or implement in the future (“need”). In addition to “work-from-home allowance,” relatively advanced initiatives that are not currently highly adopted, such as “side job allowed by employer,” “workation allowed by employer” and “live and work at two locations; move to and work from suburb or countryside,” show a large gap between current use and need across all regions. The need also exceeds current use across all regions in “mobile work,” “flextime program” and “skill improvement, self-learning, recurrent education provided/supported by employer.”

**Figure 14: <Greater Tokyo> Work Style Initiatives (Currently Used and Need)**



**Figure 15: <Osaka City> Work Style Initiatives (Currently Used and Need)**

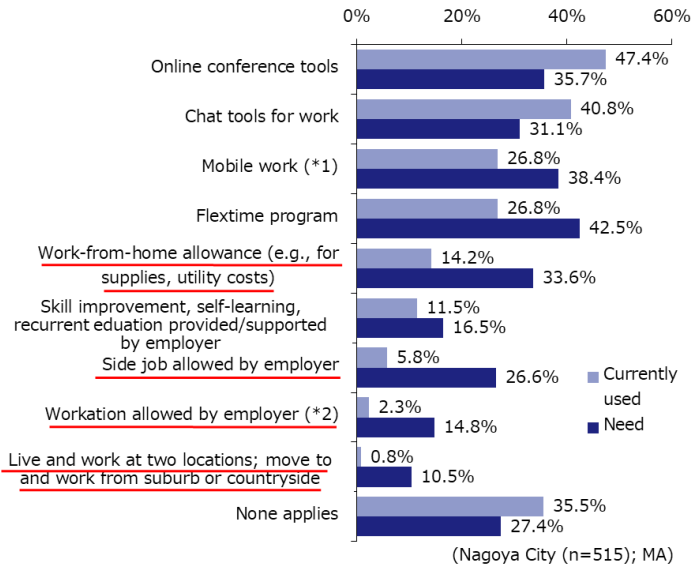


\*1 Mobile work: A work style that allows workers to work outside of their designated office in a similar network environment to the office anytime, anywhere using a smartphone, mobile PC or other device.

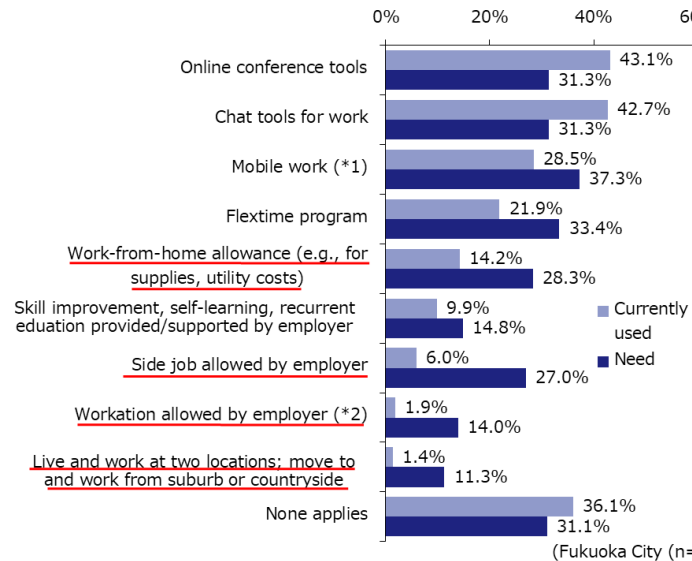
\*2 Workation: A portmanteau of working vacation, meaning to work from a travel destination, etc.

# There is also a need for advanced initiatives such as side jobs and workation

**Figure 16: <Nagoya City> Work Style Initiatives (Currently Used and Need)**



**Figure 17: <Fukuoka City> Work Style Initiatives (Currently Used and Need)**



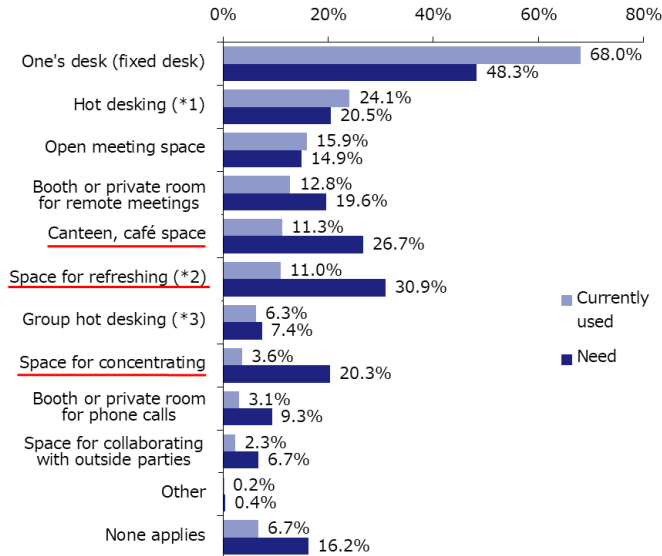
\*1 Mobile work: A work style that allows workers to work outside of their designated office in a similar network environment to the office anytime, anywhere using a smartphone, mobile PC or other device.

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

# “Space for refreshing” has the largest gap between current use and need

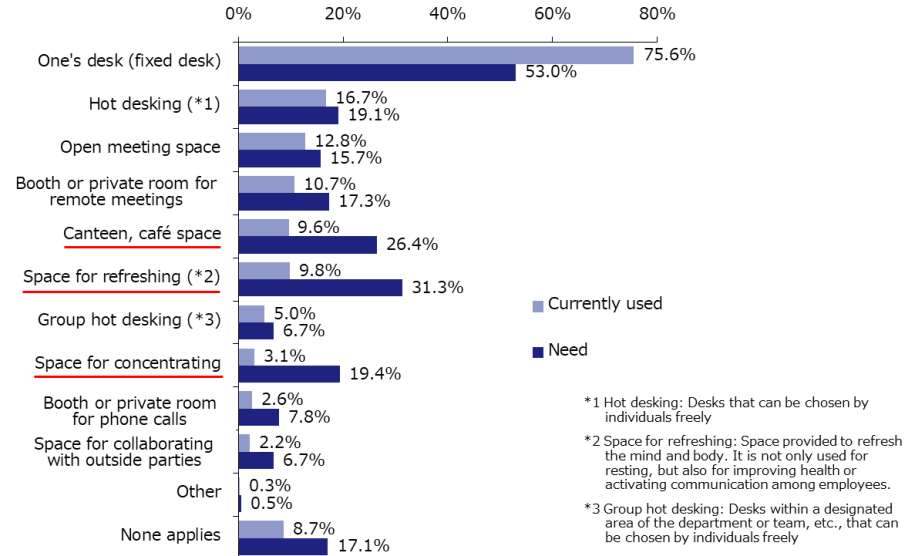
Figures 18 to 21 show the layouts actually used in the respondents’ regular office (“currently used,” Figure 13) and the layouts respondents wish to have in their regular office (“need”) by office location. The gap between current use and the need is large for “canteen, café space,” “space for refreshing” and “space for concentrating” in all regions. In particular, there is a gap of more than 20 percentage points in “space for refreshing” across all regions, indicating that availability has not kept pace with workers’ needs.

**Figure 18: <Greater Tokyo> Office Layouts (Currently Used and Need)**



(Greater Tokyo (n=2,060); MA)

**Figure 19: <Osaka City> Office Layouts (Currently Used and Need)**

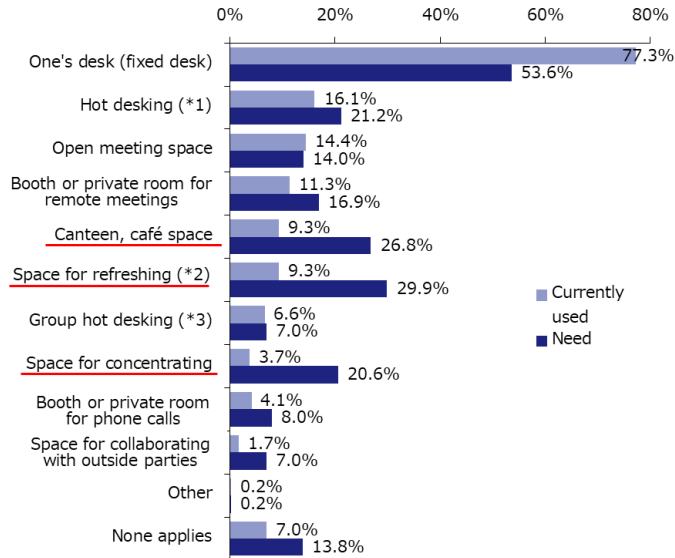


(Osaka City (n=1,030); MA)

\*1 Hot desking: Desks that can be chosen by individuals freely  
 \*2 Space for refreshing: Space provided to refresh the mind and body. It is not only used for resting, but also for improving health or activating communication among employees.  
 \*3 Group hot desking: Desks within a designated area of the department or team, etc., that can be chosen by individuals freely

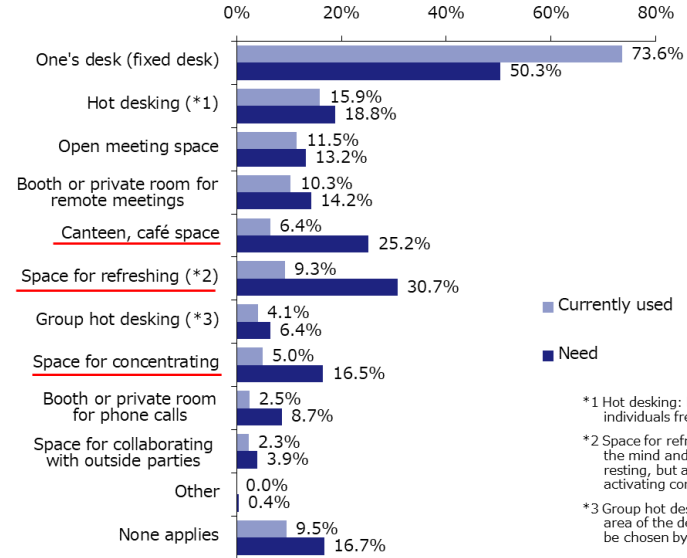
# “Space for refreshing” has the largest gap between current use and need

**Figure 20: <Nagoya City> Office Layouts (Currently Used and Need)**



(Nagoya City (n=515); MA)

**Figure 21: <Fukuoka City> Office Layouts (Currently Used and Need)**



(Fukuoka City (n=515); MA)

\*1 Hot desking: Desks that can be chosen by individuals freely  
 \*2 Space for refreshing: Space provided to refresh the mind and body. It is not only used for resting, but also for improving health or activating communication among employees.  
 \*3 Group hot desking: Desks within a designated area of the department or team, etc., that can be chosen by individuals freely