

Greater Tokyo Office Worker Survey 2022

Capturing changes in workers' work styles and values

November 30, 2022

Since the outbreak of the COVID-19 pandemic in spring 2020, many companies have been forced to review employees' work styles and the workplace, such as by introducing telework. These changes are expected to affect not only companies' management strategies, but also the work and private lives of office workers.

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 12 Metropolitan Areas Office Demand Surveys of companies since autumn 2016 and six Greater Tokyo Office Worker Surveys of office workers 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 7th office worker survey conducted in October 2022.

Main Findings

1. Work styles during the COVID-19 pandemic

- The percentage of teleworkers was 61.5%, of whom only 5.7% teleworked full time. Many teleworkers embraced hybrid work, which combines teleworking and coming to the office.
- Workers worked in their "regular office" for an average of 67.9% of their time. They worked from home for most of their remaining time spent teleworking.

2. Benefits of and dissatisfactions with telework

- The top answer for the benefit of telework was "Reduction in travel/commute time" (83.0%), while the top answer for dissatisfaction with working from home was "Prone to lack exercise or become unhealthy" (44.0%).
- As for satisfaction in the telework measures of workers' employers, 39.4% of the workers were dissatisfied with "Company's subsidy/support for telework."

3. Assessment of telework

- When we asked teleworkers to assess their performance and engagement under their current work style, a majority of them replied that both their performance and engagement "improved" or saw "no change" compared to when they came to the office full-time five days a week. As for stress, approximately 60% replied that it was "alleviated."

4. Work styles and the workplace after the end of the COVID-19 pandemic

- 65.8% of respondents wished to use telework for any length of time after the end of the pandemic.
- The features of satellite offices that a majority of workers wish to use in the future or continue using were that it is close to their homes (73.1%) and that there is a private room where the worker can concentrate on work (62.6%).

1. Work styles during the COVID-19 pandemic

1.1. Percentage of teleworkers

In this survey, we obtained valid answers from 2,060 men and women aged 20 and above, whose profession is officer or staff of a company or organization, whose job category is managerial, specialized or technical, clerical or sales, whose regular office is located in Greater Tokyo (Tokyo, Kanagawa, Saitama, and Chiba prefectures), and whose principal workplace before the pandemic as well as now is the office or home. In this report we will look into the current work styles of the respondents.

We will start by looking at how many workers came to the office during the COVID-19 pandemic. At the time of the survey, “teleworkers,” i.e., respondents who teleworked for any length of time, accounted for 61.5% of all respondents, while those who worked in the office full time and did not telework accounted for 38.5% (**Figure 1**). Workers who teleworked full time accounted for only 5.7% of total, indicating that many teleworkers embraced hybrid work, which combines teleworking and coming to the office. Compared to the 2020 and 2021 surveys, the percentage of workers who came to the office full time increased slightly. For reference, we have included charts indicating the percentage of teleworkers by attribute at the end of the report (**Reference 1–4**).

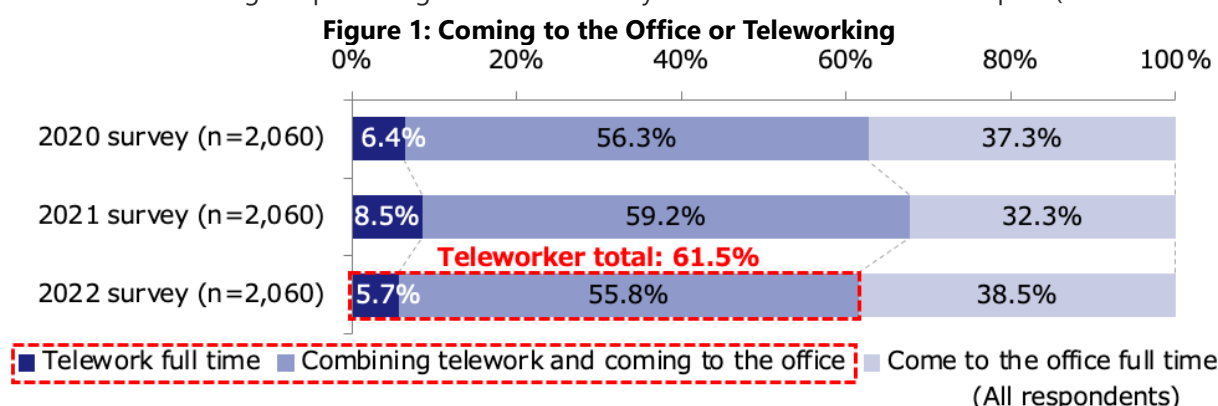
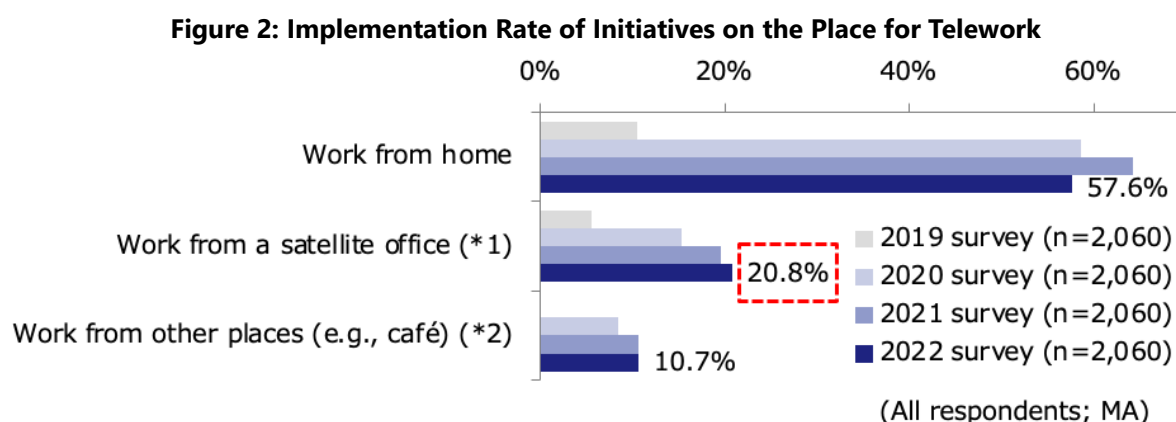


Figure 2 is an annual comparison of the implementation rate of initiatives on the place for telework. While the implementation rate of each initiative has risen significantly since the 2020 survey, which was conducted after the outbreak of the COVID-19 pandemic, there are differences between places this time. While “Work from home” (57.6%) decreased, “Work from a satellite office” (20.8%) increased.

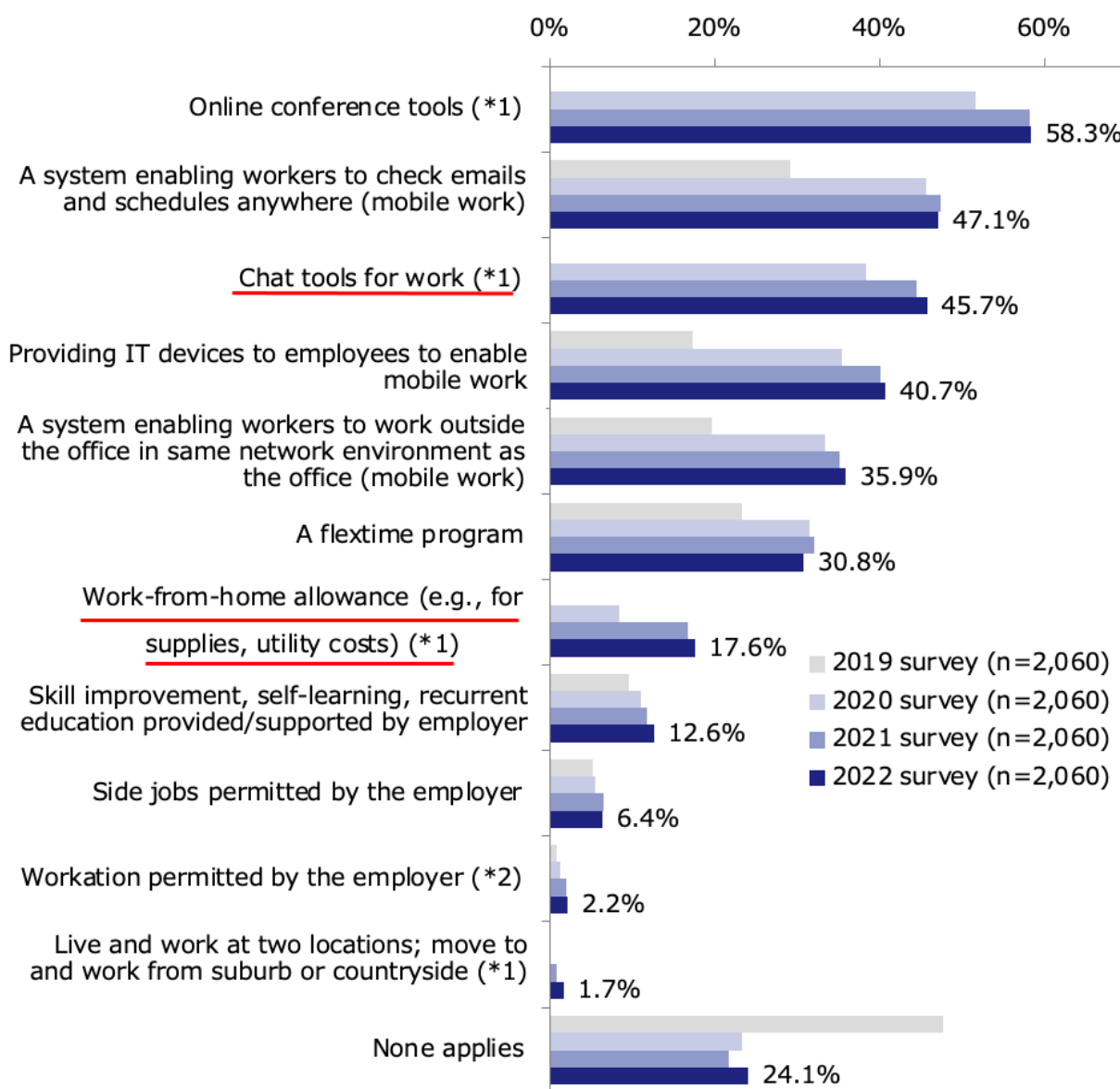


*1 Satellite office: A collective term for workplaces provided for telework apart from the main office or the home. Surveys other than the 2020 survey indicate the sum of "Using satellite office, etc. owned or rented by the employer" and "Using serviced offices and shared offices, etc. provided by a specialized operator."

*2 No chart is indicated for surveys that did not include this option.

Similarly, **Figure 3** is an annual comparison of work style initiatives currently used or implemented. Some increases were seen in initiatives that support telework, such as “Chat tools for work” (45.7%) and “Work-from-home allowance (e.g., for supplies, utility costs) (17.6%).

Figure 3: Implementation Rate of Initiatives on Work Styles



(All respondents; MA)

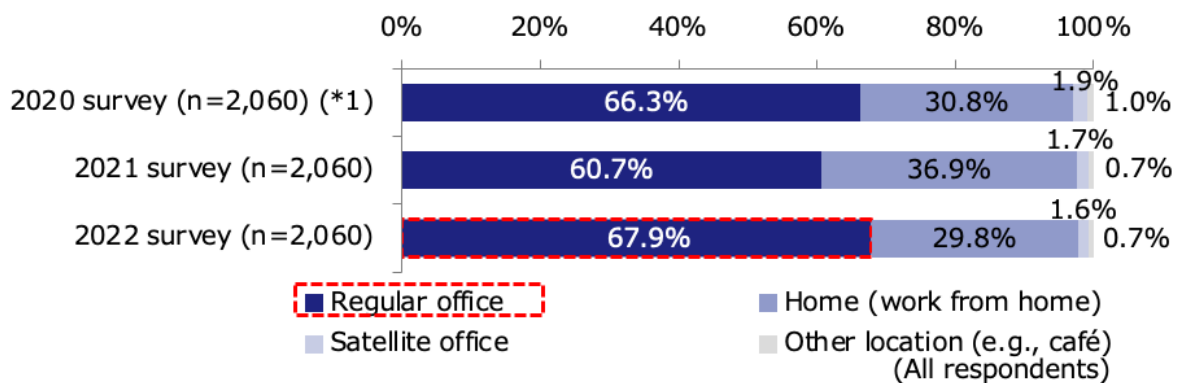
*1 No chart is indicated for surveys that did not include this option.

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

1.2. Switching between coming to the office and teleworking (time allocation)

When examining how workers split their time between each place of work, i.e., their regular office, home (working from home), satellite office, and other location, we found that they spend an average of 67.9% of their time working from their regular office, a 7.2 pt increase from the previous survey (**Figure 4**). Furthermore, we found that most of workers' time spent working other than in their regular office, i.e., their time teleworking, was spent working from home. Although time spent working in a satellite office was only 1.6%, future growth may be anticipated given that the implementation rate of satellite offices is 20.8% (**Figure 2**).

Figure 4: Time Allocated to Each Place of Work



*1 The results of the 2020 survey were not shown in the report for that year.

As for the benefits of coming to one's regular office, the top replies were communication-related, such as "Availability of work facilities (e.g., communication network, appliances, workspace)" (49.0%), ranking top, "Easy to carry out business communication (e.g., negotiations)" (45.5%) and "Easy to engage in communication (e.g., chatting)" (39.7%) (**Figure 5**). On the other hand, "Easy to concentrate on work" also ended high with 29.2% of the votes, suggesting that workers require space where they can concentrate alone in the office as well.

Figure 5: Benefits of Coming to the Office

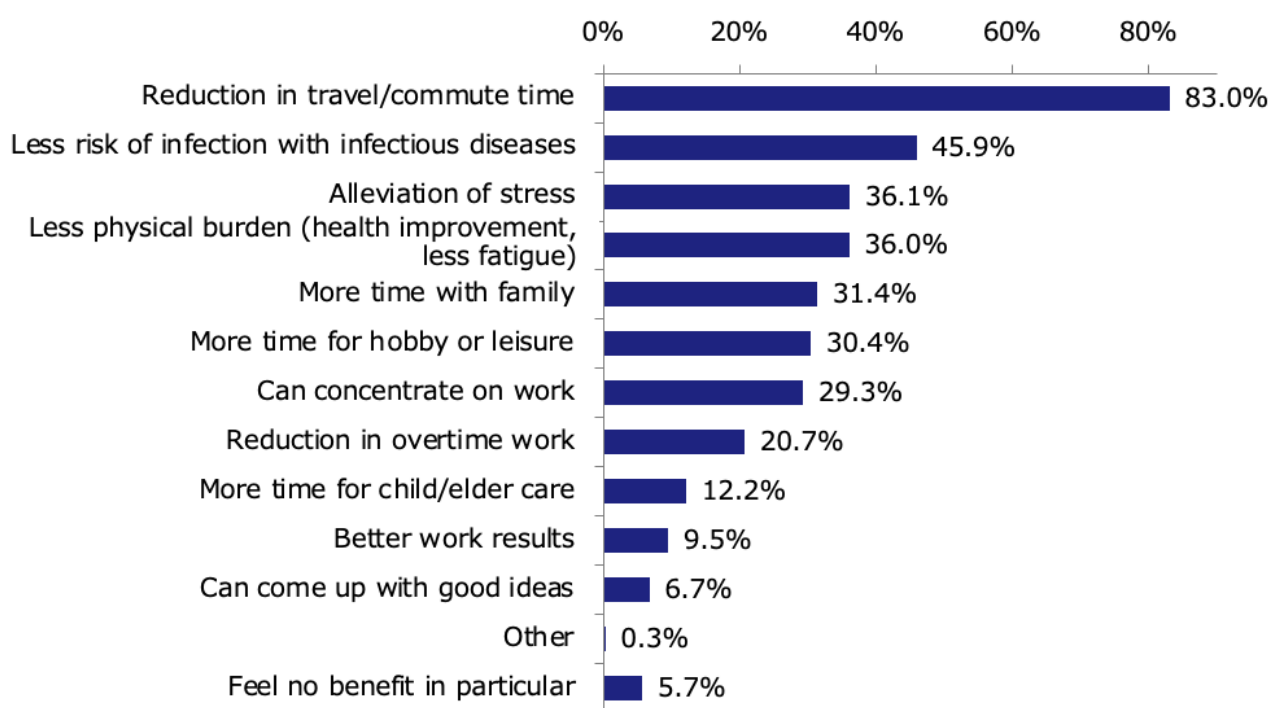


2. Benefits of and dissatisfaction with telework

Figure 6 shows the benefits of telework according to workers with telework experience.*¹ By far the top reply was “Reduction in travel/commute time” (83.0%), followed by “Less risk of infection with infectious diseases” (45.9%) and “Alleviation of stress” (36.1%). The percentage of “Feel no benefit in particular” (5.7%) dropped further from the previous survey (10.4%), indicating that many of those with telework experience saw some kind of benefit in teleworking.

*1 Those not currently teleworking but has telework experience in the past and those currently teleworking are collectively referred to as “workers with telework experience.”

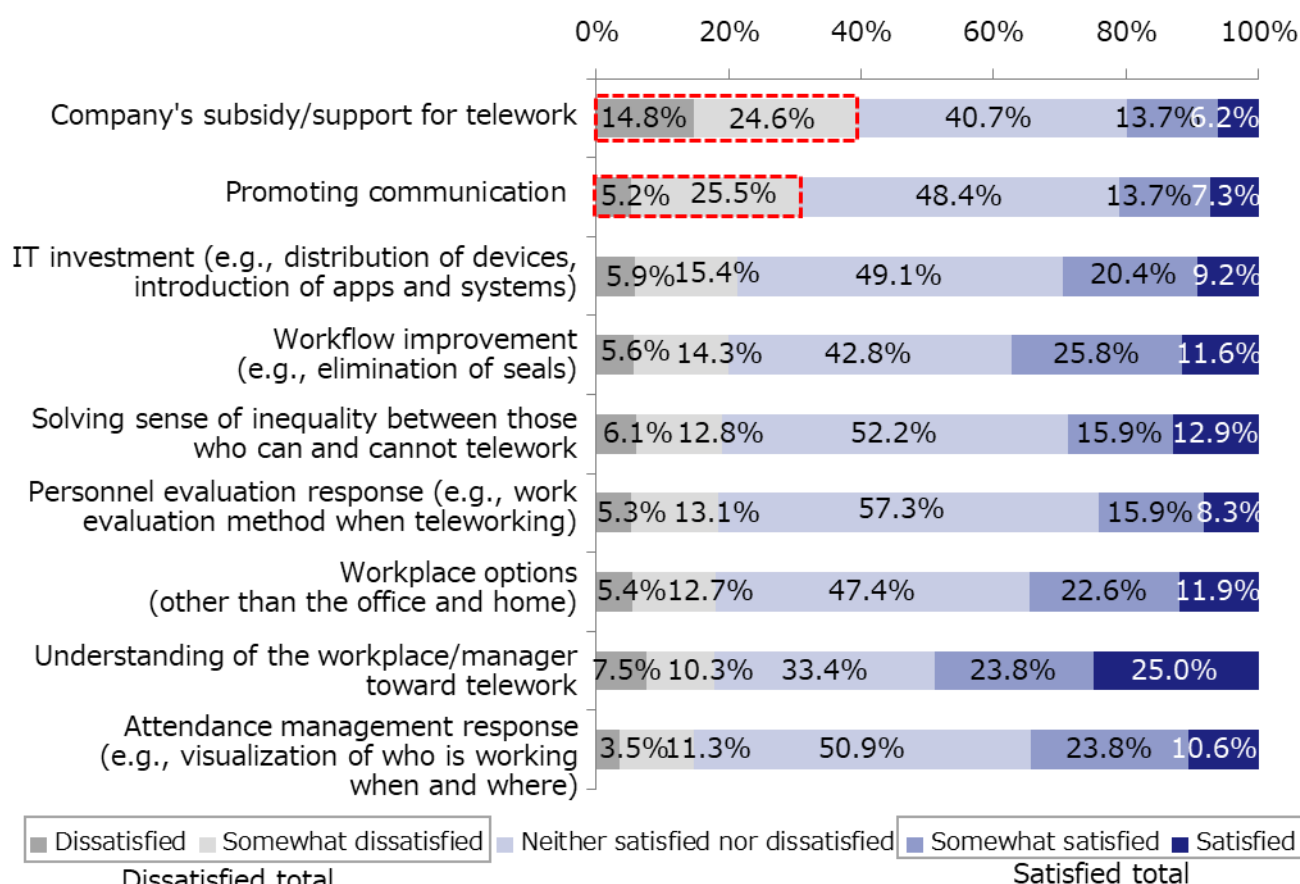
Figure 6: Benefits of Teleworking



(Workers with telework experience (n=1,486); MA)

Similarly, we asked workers with telework experience to rate their satisfaction with the telework initiatives of their employer on a 5-point scale ranging from "Satisfied" to "Dissatisfied" (**Figure 7**). The initiative that garnered the most dissatisfaction (sum of "Dissatisfied" and "Somewhat dissatisfied") was "Company's subsidy/support for telework," with which 39.4% of workers were dissatisfied. This was followed by "Promoting communication" (30.7% in total), with which dissatisfaction also outstripped satisfaction (sum of "Satisfied" and "Somewhat satisfied"), suggesting that communication is an issue in telework. However, satisfaction outstripped dissatisfaction in all other initiatives.

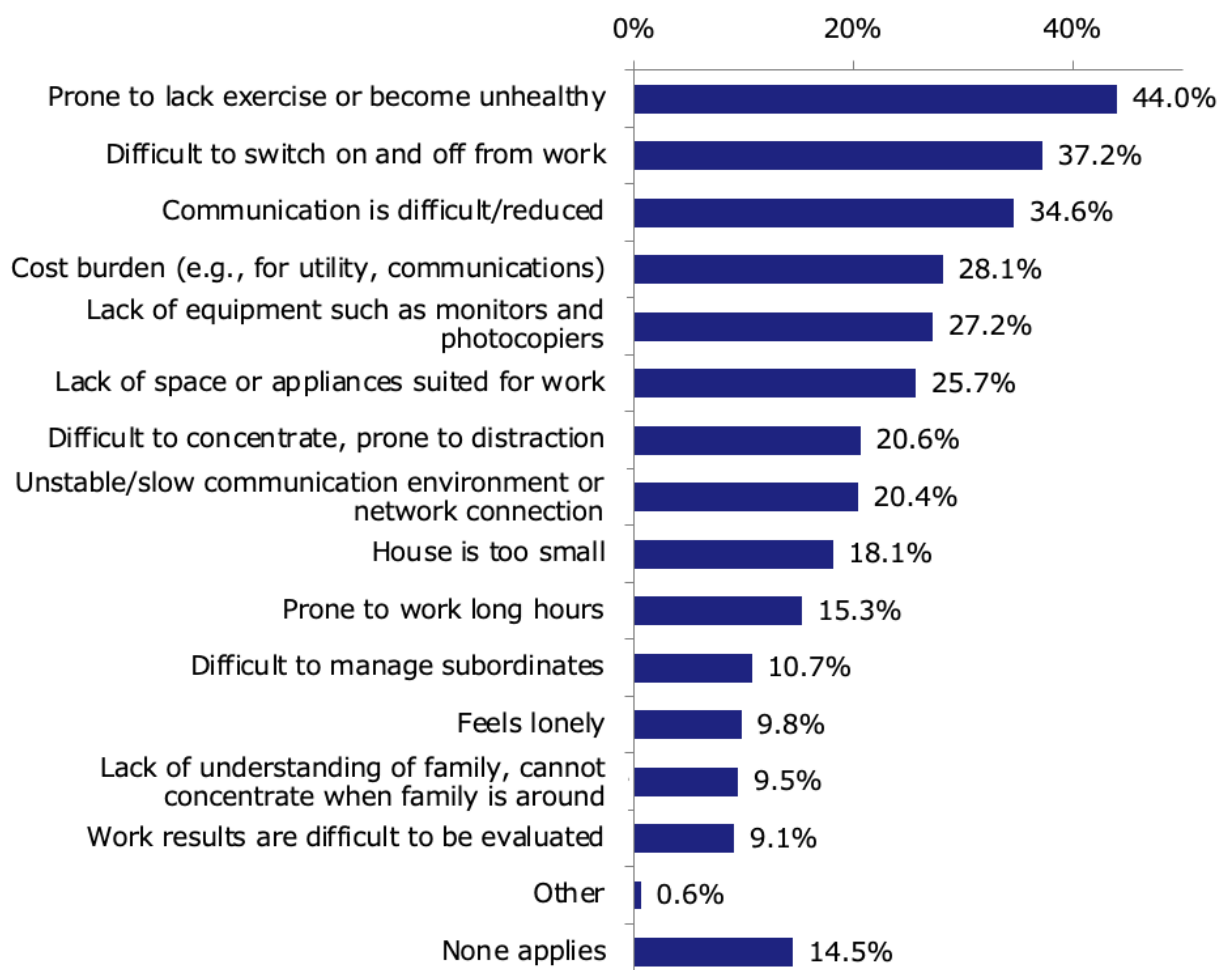
Figure 7: Satisfaction with Employer's Telework Initiatives



(Workers with telework experience (n=1,486))

We then asked workers with work-from-home experience their dissatisfaction with working from home (**Figure 8**). The top replies were “Prone to lack exercise or become unhealthy” (44.0%) and “Difficult to switch on and off from work” (37.2%). “Cost burden (e.g., for utility, communications),” which is related to “Company’s subsidy/support for telework,” which many respondents were dissatisfied with in **Figure 7**, ranked high in workers’ dissatisfaction with working from home.

Figure 8: Dissatisfaction with Working from Home



(Workers with work-from-home experience (n=1,446); MA)

3. Assessment of telework

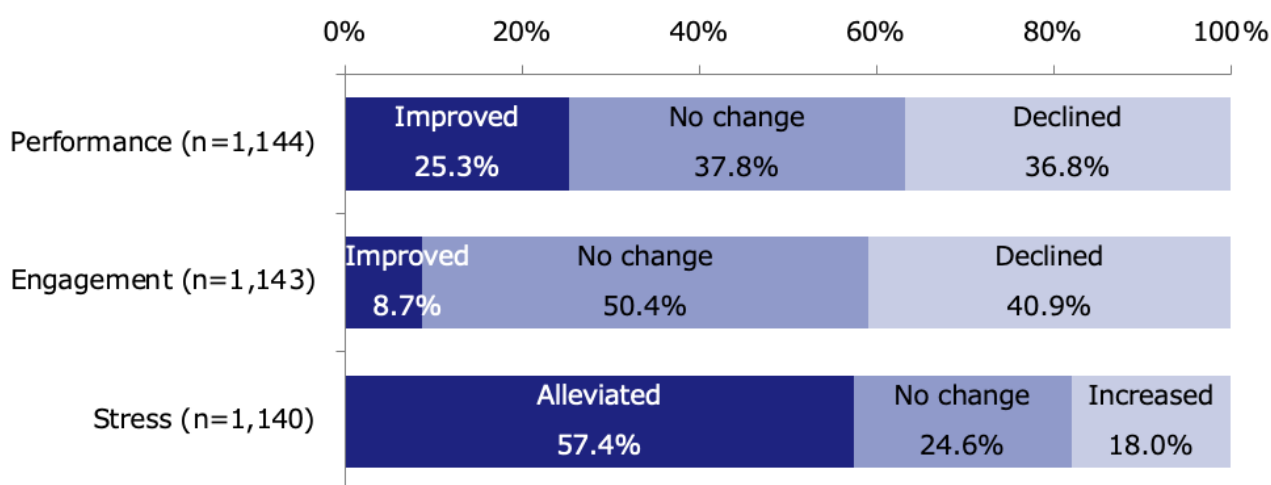
In this chapter we will look at workers' assessment of telework. We asked teleworkers^{*2} to rate their current work style (a comprehensive rating including not only when teleworking but also when coming to the office) from the perspectives of performance, engagement, and stress, with coming to the office 5 days a week as 100. The average ratings were as follows: performance 97.6, engagement 86.3, and stress 83.3.

^{*2} Teleworkers (61.5%) as confirmed in **Figure 1** minus workers who replied that they currently allocate 100% of their work time to their "regular office."

We sorted the assessment into three groups^{*3} for each perspective and indicated their respective percentages in **Figure 9**. While there had been concerns that performance and engagement would decline when teleworking, the sum of "Improved" and "No change" accounted for more than 50% in both. As for stress, 57.4% of teleworkers replied that it was "alleviated," with the percentage rising to more than 80% when including "No change."

^{*3} For performance and engagement, ratings of 101 and above are categorized as "Improved," 100 as "No change," and 99 and below as "Declined." For stress, ratings of 99 and below are categorized as "Alleviated," 100 as "No change," and 101 and above as "Increased."

**Figure 9: Teleworkers' Assessment of Performance, Engagement, and Stress
<Compared to Coming to the Office 5 Days a Week>**

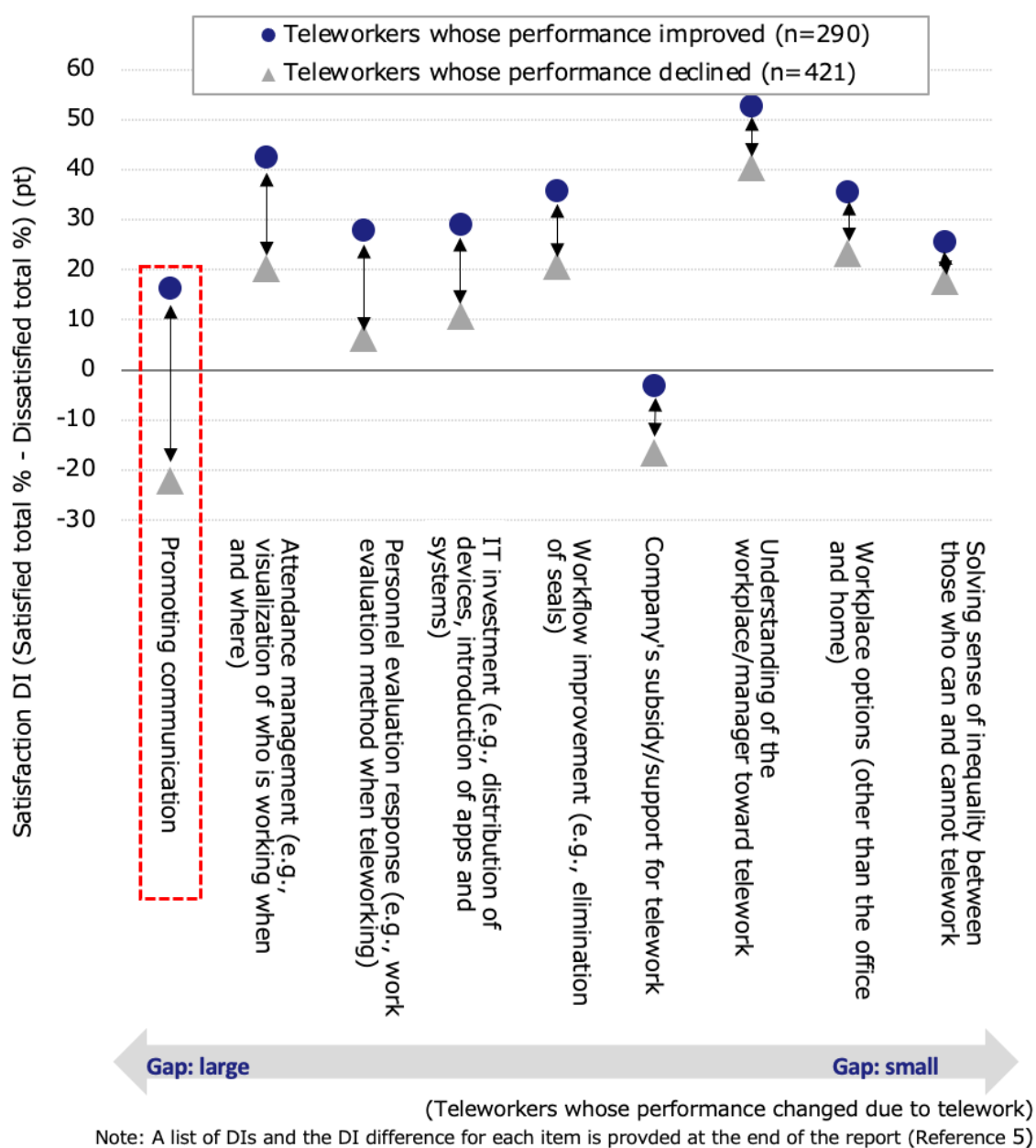


(Teleworkers (excl. outliers of each answer))

We then compared the satisfaction with employers' telework initiatives (**Figure 7**) between workers whose assessment of performance improved and those whose assessment of performance declined (**Figure 10**). The "Satisfaction DI" on the vertical scale represents the percentage of "Satisfied" and "Somewhat satisfied" for each initiative minus the percentage of "Dissatisfied" and "Somewhat dissatisfied." A positive value means there are more workers who are satisfied than those who are dissatisfied.

Figure 10 indicates that workers whose performance improved have a higher satisfaction DI in all initiatives than workers whose performance declined. This implies that there is a certain relationship between companies' investments in telework initiatives and workers' performance. There is a large gap in satisfaction with "Promoting communication" in particular between workers whose performance improved and those whose performance declined. Based on these findings, it will be necessary to further analyze the impact of telework initiatives on the performance of workers.

Figure 10: Satisfaction with Employers' Telework Initiatives – By Assessment of Performance



Furthermore, we compared workers' dissatisfaction with working from home, which accounts for most of workers' time teleworking (**Figure 4**), by assessment of performance (**Figure 11**). In most of the points of dissatisfaction, a larger percentage of those whose performance declined felt dissatisfied than those whose performance improved. The difference was particularly large in "Difficult to concentrate, prone to distraction" (difference between declined and improved (the same applies hereinafter): 17.4 pt), "Difficult to switch on and off from work" (16.9 pt), and "Communication is difficult/reduced" (13.3 pt).

Figure 11: Dissatisfaction with Working from Home – By Assessment of Performance

	Declined (n=415)	Improved (n=289)	Declined- Improved
<u>Difficult to concentrate, prone to distraction</u>	29.2%	11.8%	17.4pt
<u>Difficult to switch on and off from work</u>	47.0%	30.1%	16.9pt
<u>Communication is difficult/reduced</u>	42.4%	29.1%	13.3pt
Lack of space or appliances suited for work	30.8%	22.5%	8.3pt
Feels lonely	14.0%	7.3%	6.7pt
House is too small	21.7%	17.0%	4.7pt
Difficult to manage subordinates	12.3%	8.0%	4.3pt
Unstable/slow communication environment or network connection	25.1%	21.1%	4.0pt
Prone to work long hours	19.3%	15.6%	3.7pt
Work results are difficult to be evaluated	12.3%	9.3%	3.0pt
Lack of equipment such as monitors and photocopiers	30.6%	27.7%	2.9pt
Lack of understanding of family, cannot concentrate when family is around	10.8%	8.7%	2.1pt
Prone to lack exercise or become unhealthy	49.9%	51.9%	-2.0pt
Cost burden (e.g., for utility, communications)	28.9%	33.2%	-4.3pt
Other	0.2%	0.3%	-0.1pt
None applies	8.0%	15.2%	-7.2pt

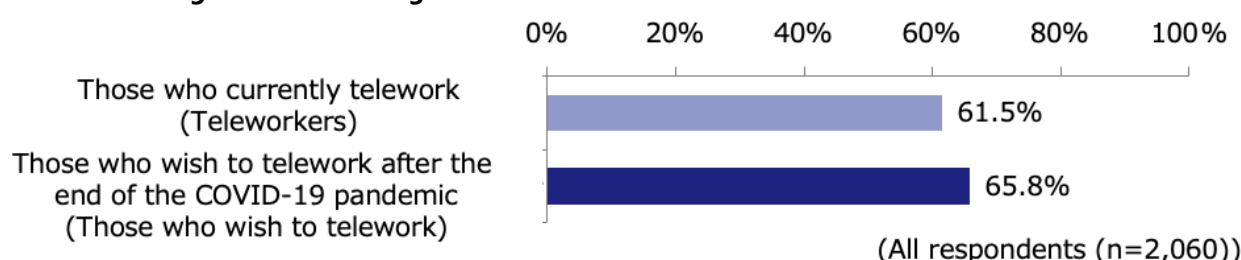
(Workers with work-from-home experience whose performance changed due to telework; MA)

4. Work styles after the COVID-19 pandemic

Lastly, we will examine respondents' needs in work styles and the workplace for after the end of the pandemic.

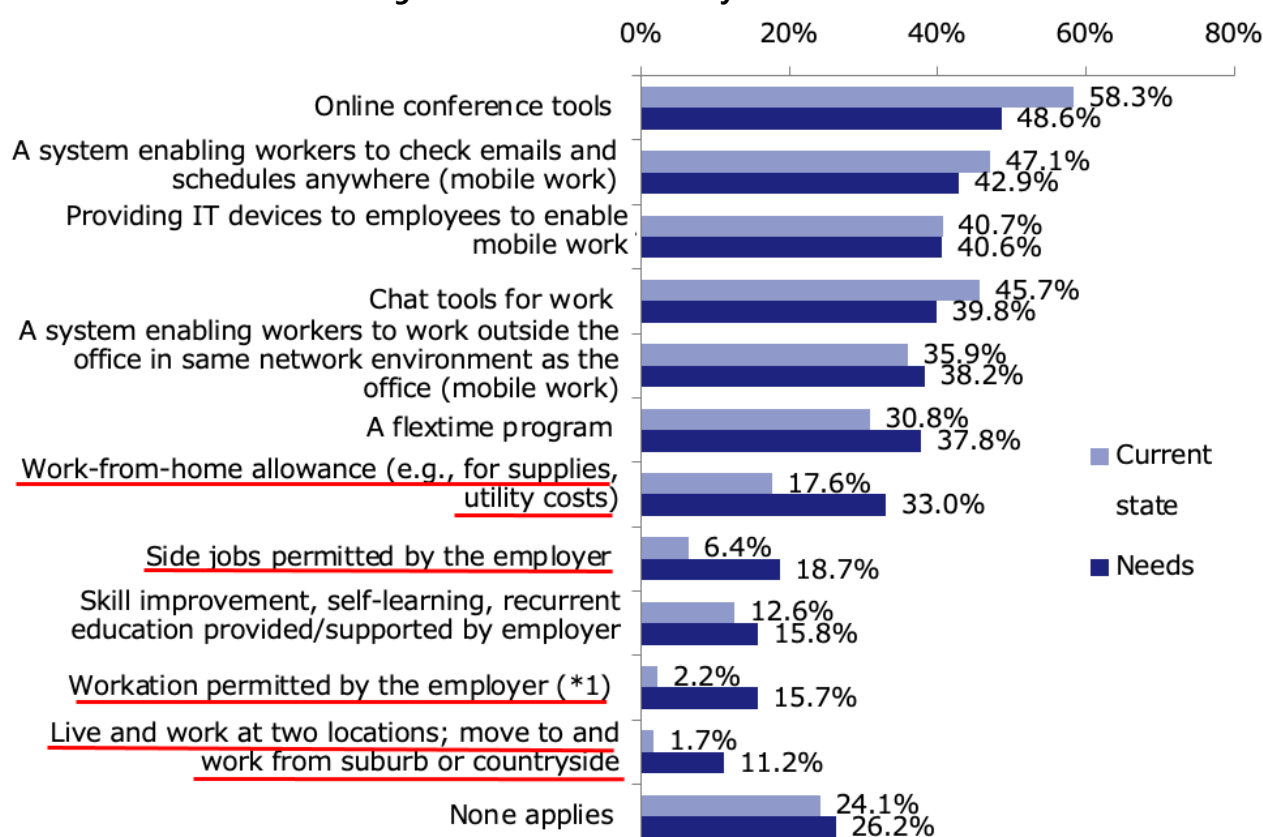
Figure 12 is the percentage of those who currently telework ("teleworkers") (**Figure 1**) and the percentage of those who wish to telework for any length of time after the end of the pandemic ("those who wish to telework"). The percentage of those who wish to telework was 65.8%, slightly higher than the that of current teleworkers.

Figure 12: Percentage of Teleworkers and Those Who Wish to Telework



We asked respondents the initiatives on work styles other than telework they currently use or implement ("Current state," **Figure 3**) and those they wish to use or implement after the end of the pandemic. The need significantly outweighed the current state in "Work-from-home allowance (e.g., for supplies, utility costs)" (+15.4 pt), "Side jobs permitted by the employer" (+12.3 pt), "Workation permitted by the employer" (+13.5 pt), and "Live and work at two locations; move to and work from suburb or countryside" (+9.5 pt) (**Figure 13**).

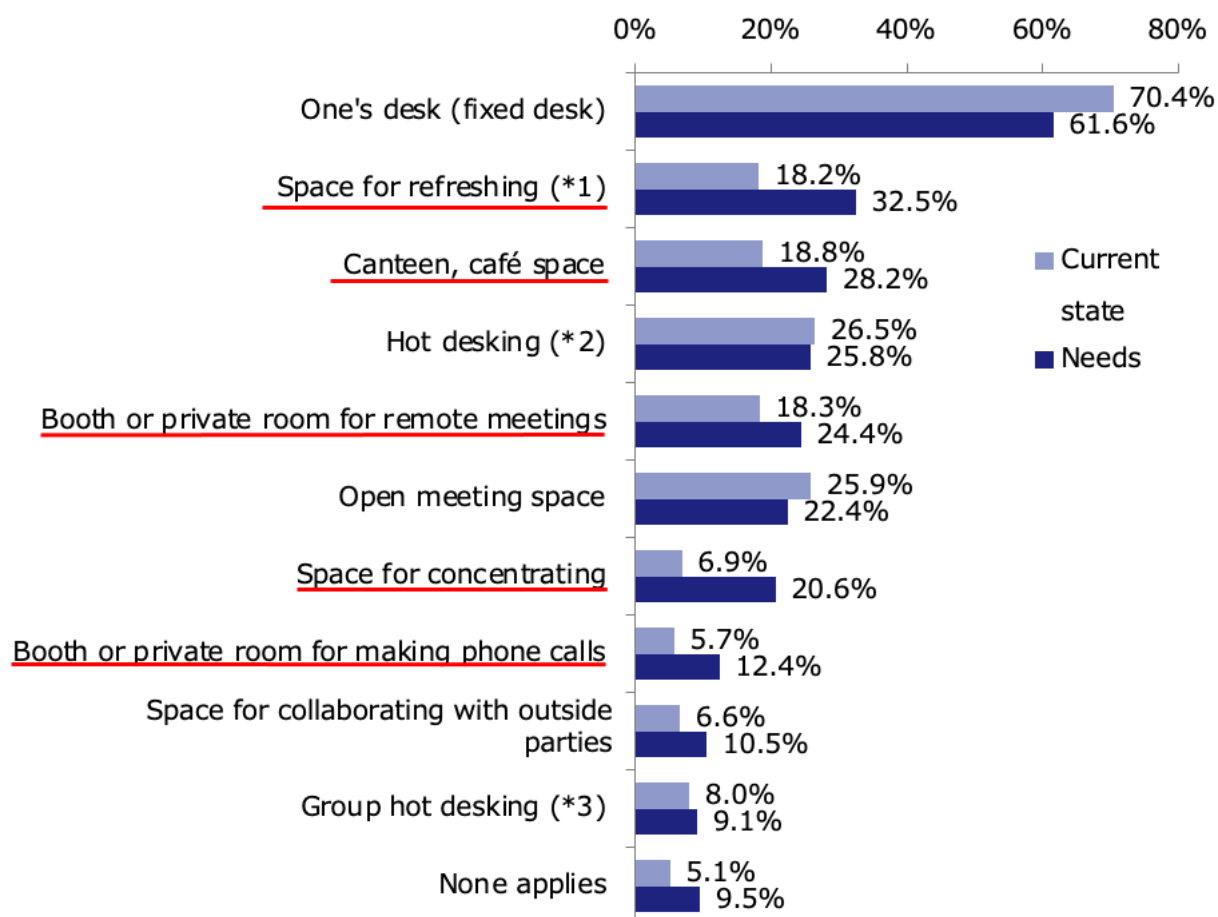
Figure 13: Needs in Work Style Initiatives



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

Figure 14 shows the layouts of respondents' regular office that currently exist and those that the respondents wish to have after the end of the COVID-19 pandemic. The layouts that saw a significant rise in needs compared to the current state included "Space for refreshing" (+14.3 pt), "Canteen, café space" (+9.4 pt), "Booth or private room for remote meetings" (+6.1 pt), "Space for concentrating" (+13.7 pt), and "Booth or private room for making phone calls" (+6.7 pt). These layouts may be introduced more in the future.

Figure 14: Layout of Office (Current State and Needs)



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

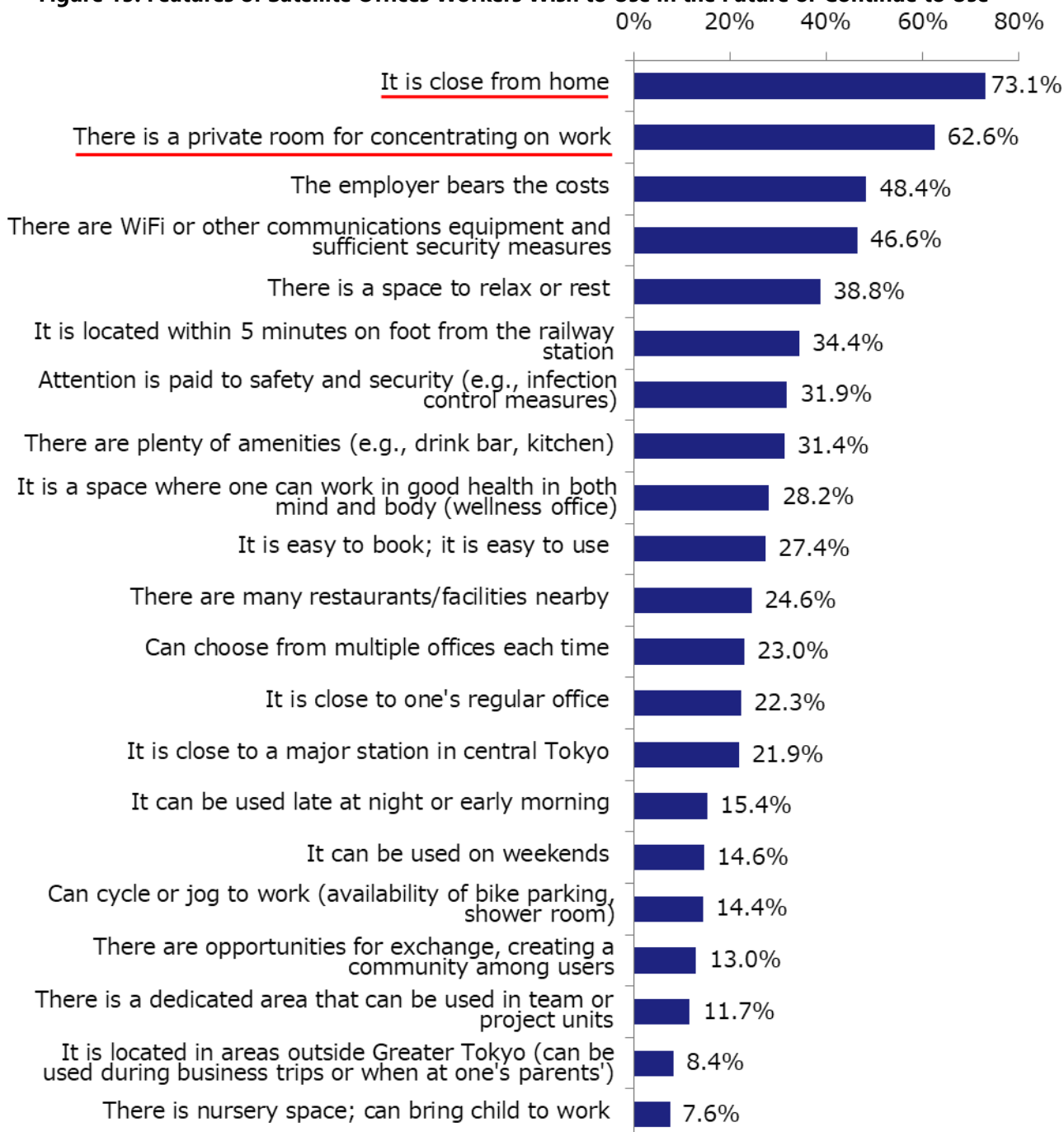
*1 Space for refreshing: Space provided to refresh the mind and body. It is used not only for resting but also for enhancing health or activating communication between employees.

*2 Hot desking: A style of desks that individuals can choose freely

*3 Group hot desking: A style of desks within a designated area of the department or team, etc. that individuals can choose freely

Although we found in **Figure 8** that workers had a wide range of dissatisfaction with working from home, not many workers currently use a satellite office, which is an alternative place for telework to the home. Thus, we asked respondents the conditions for using or continuing to use a satellite office, irrespective of whether they have had an experience of using one (**Figure 15**). Among the various features, "It is close from home" (73.1%) and "There is a private room for concentrating on work" (62.6%) attracted more than 50% of the votes.

Figure 15: Features of Satellite Offices Workers Wish to Use in the Future or Continue to Use



(Excluding those who answered "Do not wish to use a satellite office" under any condition (n=1,429); MA; excerpt)

5. Summary

In this report, we considered the work styles of office workers in Greater Tokyo going forward by examining their current work styles after approximately 2.5 years from the outbreak of the COVID-19 pandemic and their needs for after the end of the pandemic.

Telework, which has spread rapidly as a result of the outbreak of the pandemic, has continued to be implemented at the time of this survey (October 2022), with teleworkers accounting for roughly 60% of all respondents. However, as their percentage has dropped slightly since the 2021 survey (67.7%), we believe workers are beginning to return to the office as the pursuit of both infection control and economic activity progresses.

Furthermore, the results of this survey imply that a certain relationship exists between workers' satisfaction with companies' telework initiatives and workers' performance (**Figure 10**). It will be necessary to continue studying whether telework initiatives affect workers' performance and, if so, what kind of initiatives specifically have a large impact. However, considering the current state where not a few workers feel dissatisfaction with working from home, it may become important for companies to make investments to maintain workers' productivity and engagement if they are to continue embracing telework. Such investments will specifically include monetary support to help workers develop a work environment and providing places for work other than workers' homes.

Amid the ever-changing situation, it will be necessary to maintain a watchful eye on how work styles and the workplace change. Xymax REI intends to continue releasing useful survey results.

Related surveys:

- *New Ways of Working and New Type 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>
- *Greater Tokyo Office Worker Survey 2021*, released on December 17, 2021
<https://www.xymax.co.jp/english/research/images/pdf/20211217.pdf>
- *Exploring the Optimal Form of Hybrid Work*, released on March 11, 2022
<https://www.xymax.co.jp/english/research/images/pdf/20220311.pdf>

Survey Overview

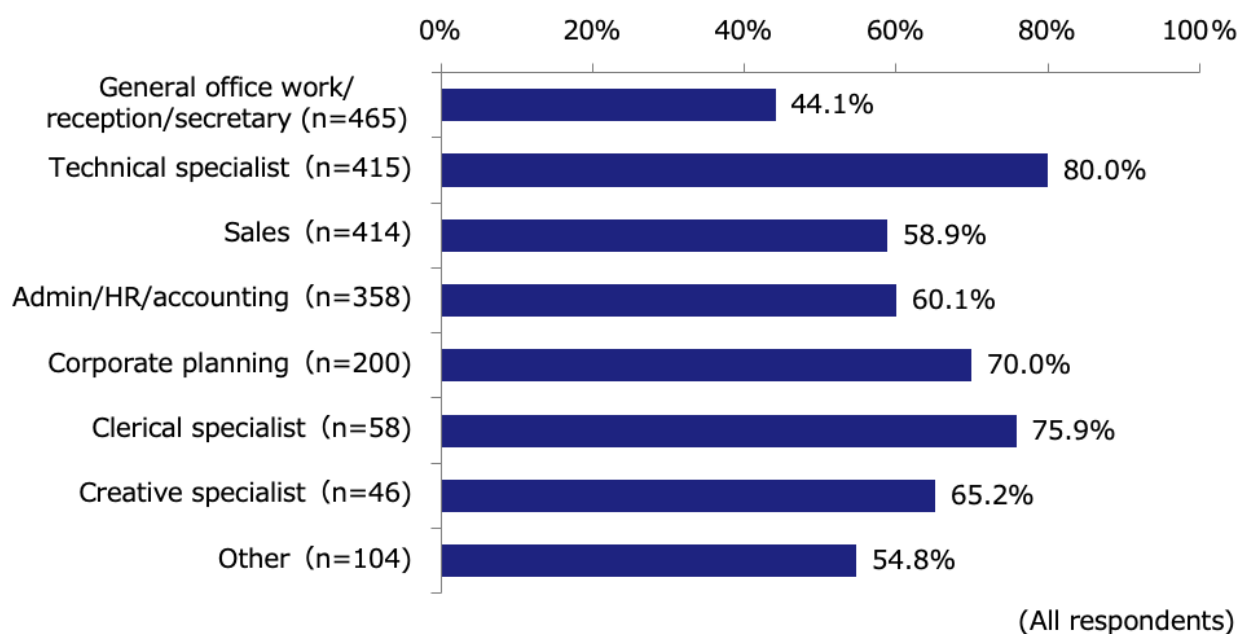
Survey period	October 2022
Target respondents	(1) Screening: 5,000 men and women aged 20 and above (2) Main survey: Those who replied in the screening that their profession was either an officer or staff of a company or organization, whose job category was managerial, specialized/technical, clerical or sales, whose regular office was located in Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures), and whose current and pre-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

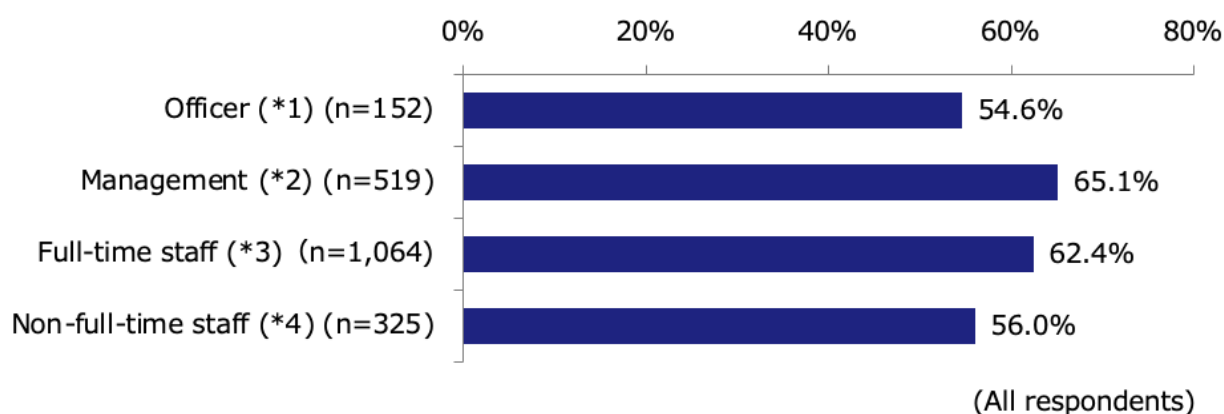
		%	n			%	n
Gender and age	Male aged 20-29	2.4%	49	Number of employees of company	1-9	7.5%	154
	Male aged 30-39	6.2%	127		10-49	12.6%	259
	Male aged 40-49	17.4%	359		50-99	8.8%	182
	Male aged 50-59	26.6%	547		100-299	14.2%	292
	Male aged 60 or older	13.7%	283		300-999	14.3%	294
	(Male total)	66.3%	1,365		1,000-2,999	11.2%	230
	Female aged 20-29	6.3%	129		3,000 or more	28.8%	594
	Female aged 30-39	9.8%	202		Don't know	2.7%	55
	Female aged 40-49	10.1%	208	Sector	Manufacturing	21.9%	452
	Female aged 50-59	6.0%	124		Information & communications	16.6%	341
	Female aged 60 or older	1.6%	32		Finance & insurance	10.6%	219
	(Female total)	33.7%	695		Wholesale & retail trade	10.6%	219
Job category	General office work/reception/secretary	22.6%	465		Services, N.E.C.	9.8%	202
	Technical specialist	20.1%	415		Construction	6.6%	135
	Sales	20.1%	414		Real estate & goods rental and leasing	4.9%	100
	Admin/HR/accounting	17.4%	358		Transport & postal activities	3.3%	69
	Corporate planning	9.7%	200		Scientific research, professional & technical services	3.3%	68
	Clerical specialist	2.8%	58		Medical, health care & welfare	2.4%	50
	Creative specialist	2.2%	46		Electricity, gas, heat supply and water	1.6%	32
	Other	5.0%	104		Education, learning support	1.3%	27
Form of employment	Officer of company/organization	7.4%	152		Compound services	1.2%	24
	Staff of company/organization (management)	25.2%	519		Living-related and personal services & amusement services	1.0%	21
	Staff of company/organization (Full-time staff other than management)	51.7%	1,064		Government, except elsewhere classified	1.0%	21
	Staff of company/organization (Other than full-time staff)	15.8%	325		Accommodations, eating & drinking	0.5%	10
					Mining and quarrying of stone and gravel	0.1%	2
					Other & industries unable to classify	3.3%	68

Reference Material

Reference 1: Percentage of Teleworkers – By Job Category



Reference 2: Percentage of Teleworkers – By Job Position

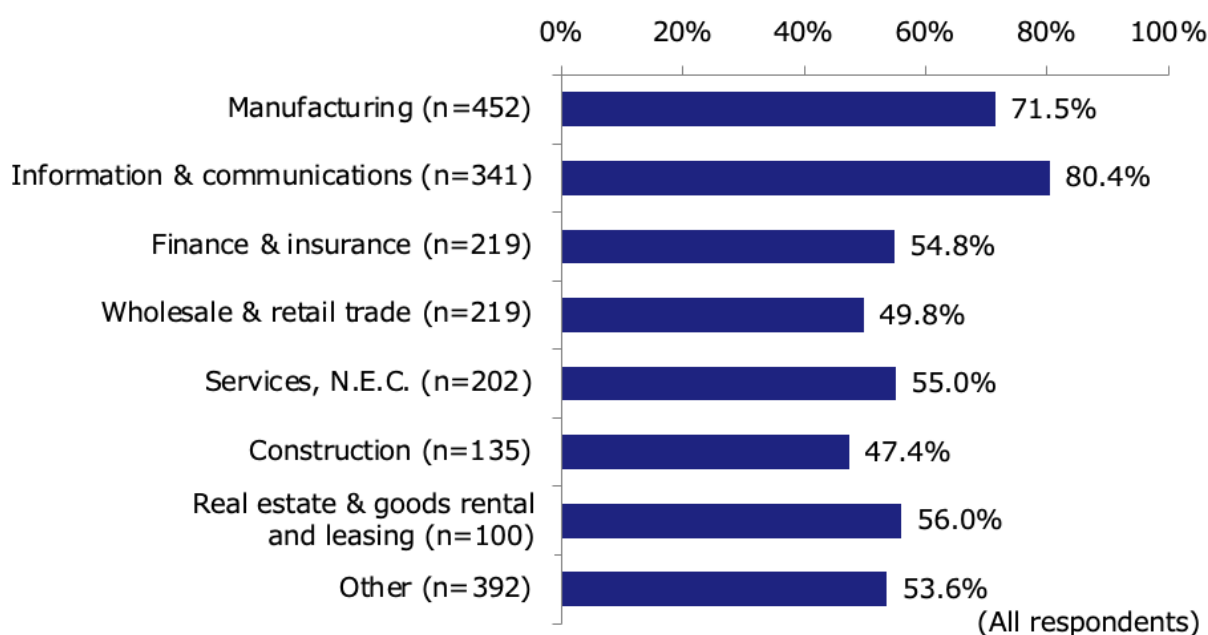
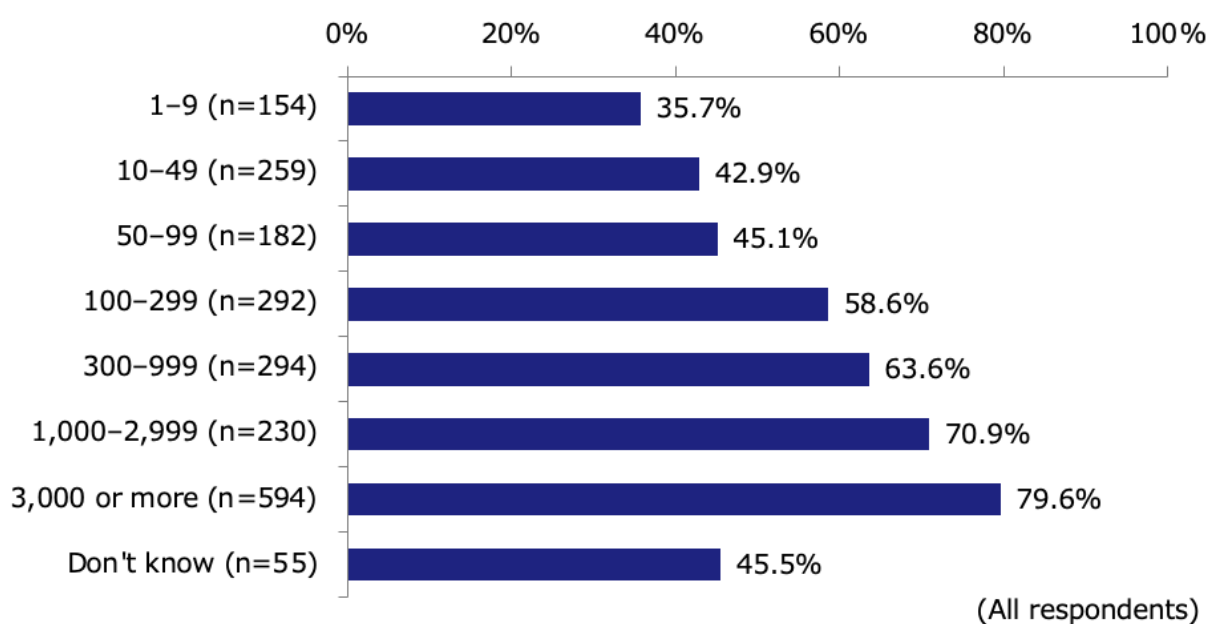


*1 Officer of company/organization

*2 Staff of company/organization (management)

*3 Staff of company/organization (Full-time staff other than management)

*4 Staff of company/organization (Other than full-time staff)

Reference 3: Percentage of Teleworkers – By Sector of Employer**Reference 4: Percentage of Teleworkers – By Number of Employees of Employer**

[Reference 5] List of DIs and Difference in DIs for Each Item of Figure 10

	Performance evaluation	Satisfied total	Dissatisfied total	Satisfaction DI	Difference in satisfaction DI Improved - Declined
Promoting communication	Improved	38.9%	22.5%	16.4	38.6
	Declined	16.1%	38.3%	-22.2	
Attendance management response (e.g., visualization of who is working when and where)	Improved	52.0%	9.4%	42.6	22.2
	Declined	35.4%	15.0%	20.4	
Personnel evaluation response (e.g., work evaluation method when teleworking)	Improved	40.7%	12.8%	27.9	21.5
	Declined	24.0%	17.6%	6.4	
IT investment (e.g., distribution of devices, introduction of apps and systems)	Improved	46.9%	17.9%	29.0	18.3
	Declined	31.9%	21.2%	10.7	
Workflow improvement (e.g., elimination of seals)	Improved	53.1%	17.2%	35.9	15.2
	Declined	38.0%	17.3%	20.7	
Company's subsidy/support for telework	Improved	32.8%	35.8%	-3.0	13.6
	Declined	21.4%	38.0%	-16.6	
Understanding of the workplace/manager toward telework	Improved	66.2%	13.4%	52.8	12.4
	Declined	54.2%	13.8%	40.4	
Workplace options (other than the office and home)	Improved	49.0%	13.4%	35.6	12.3
	Declined	39.4%	16.1%	23.3	
Solving sense of inequality between those who can and cannot telework	Improved	40.7%	15.1%	25.6	7.8
	Declined	32.3%	14.5%	17.8	

Teleworkers whose performance improved due to telework (n=290)

Teleworkers whose performance declined due to telework (n=421)

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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