

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

Capturing changes in workers' work styles and values

December 13, 2023

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 summary report is an excerpt of the results of the survey concerning the reality and needs in work styles. "(2) Evaluation of Work Styles,"^{*1} 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

Main Findings

- 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% (**Figure 1-1**). However, compared to previous surveys, the percentage is declining after peaking in 2021 (**Figure 1-2**).
- Workers who replied that their frequency of coming to the office had increased from during the pandemic to the present 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 (**Figure 2**).
- 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 allowance" 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 regions (**Figure 3**).
- 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 region, indicating that availability has not kept pace with workers' needs (**Figure 4**).

<Survey Overview>

Survey period:	October 2023
Target respondents:	(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.
Number of valid answers:	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)
Geographical coverage:	Greater Tokyo (Tokyo, Kanagawa, Saitama and Chiba prefectures) and Gifu, Aichi, Mie, Shiga, Kyoto, Osaka, Hyogo, Nara, Wakayama, Fukuoka and Saga prefectures
Survey method:	Online

<Related survey>

- *Greater Tokyo Office Worker Survey 2022*, released on November 30, 2022
<https://www.xymax.co.jp/english/research/images/pdf/20221130.pdf>

topic 1

In terms of the percentage of “teleworkers,” i.e., those who teleworked for any length of time at the time of the survey, Greater Tokyo had the highest percentage at 51.4%, more than half of the respondents (Figure 1-1). Teleworkers also account for about 40% in regional cities. Compared to previous surveys on the telework situation in Greater Tokyo, the percentage of teleworkers has been declining since peaking in 2021 (Figure 1-2).

Figure 1-1: Percentage of Teleworkers – By Office Location

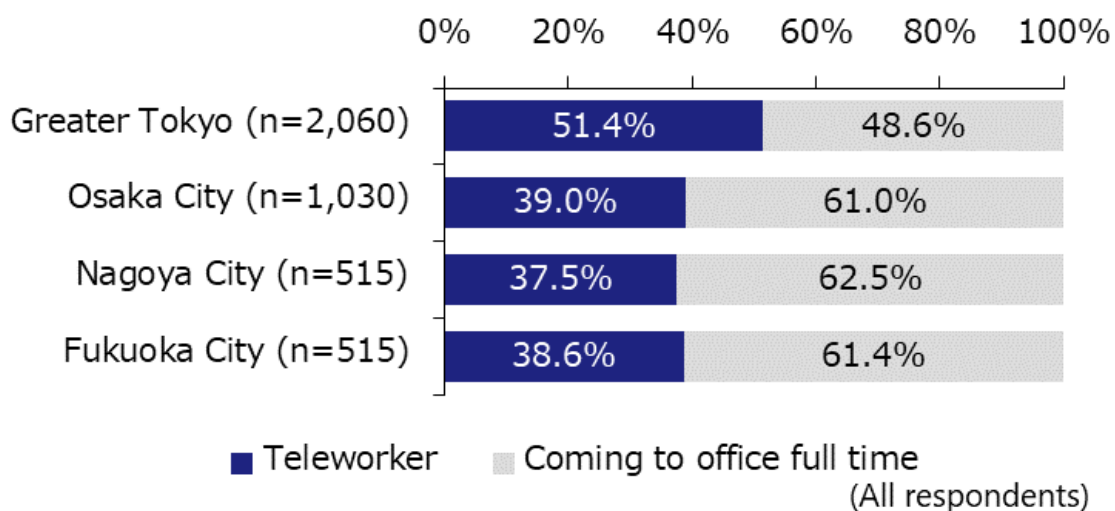
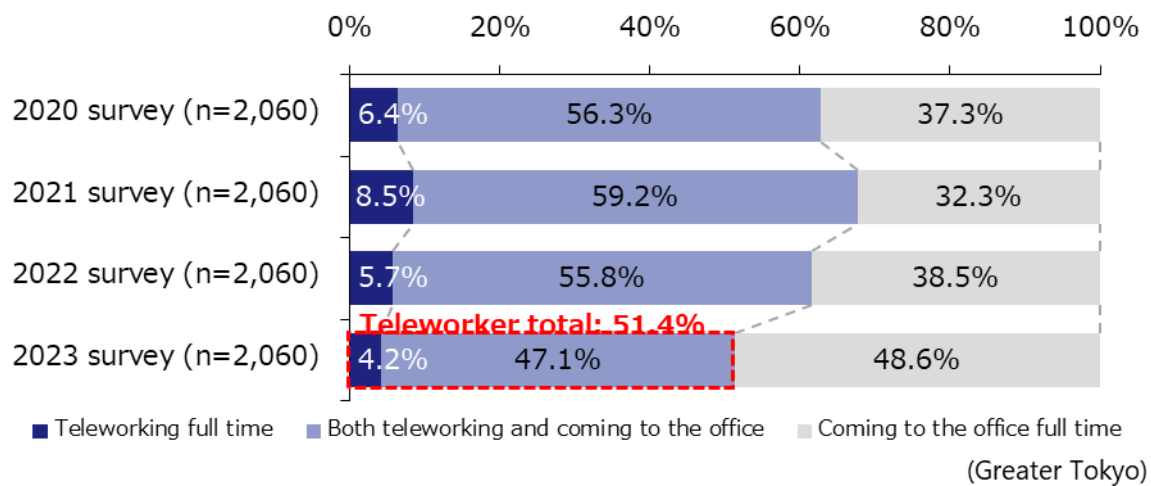


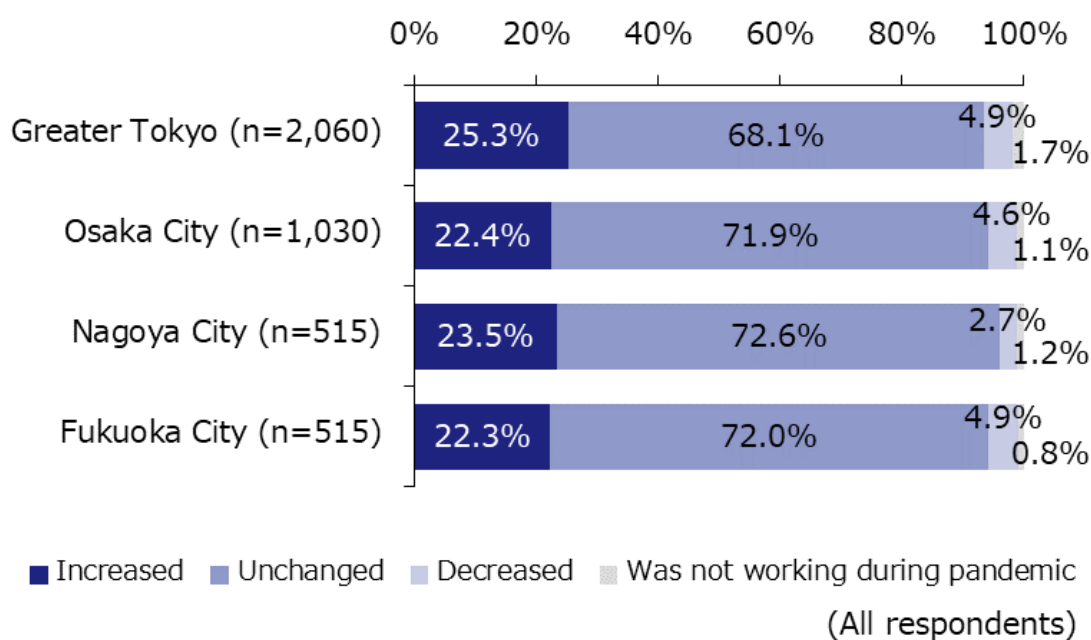
Figure 1-2: Coming to the Office or Teleworking (Greater Tokyo, Comparison over Time)



topic 2

Workers who replied that their frequency of coming to the office had increased from during the pandemic to the present 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 (Figure 2).

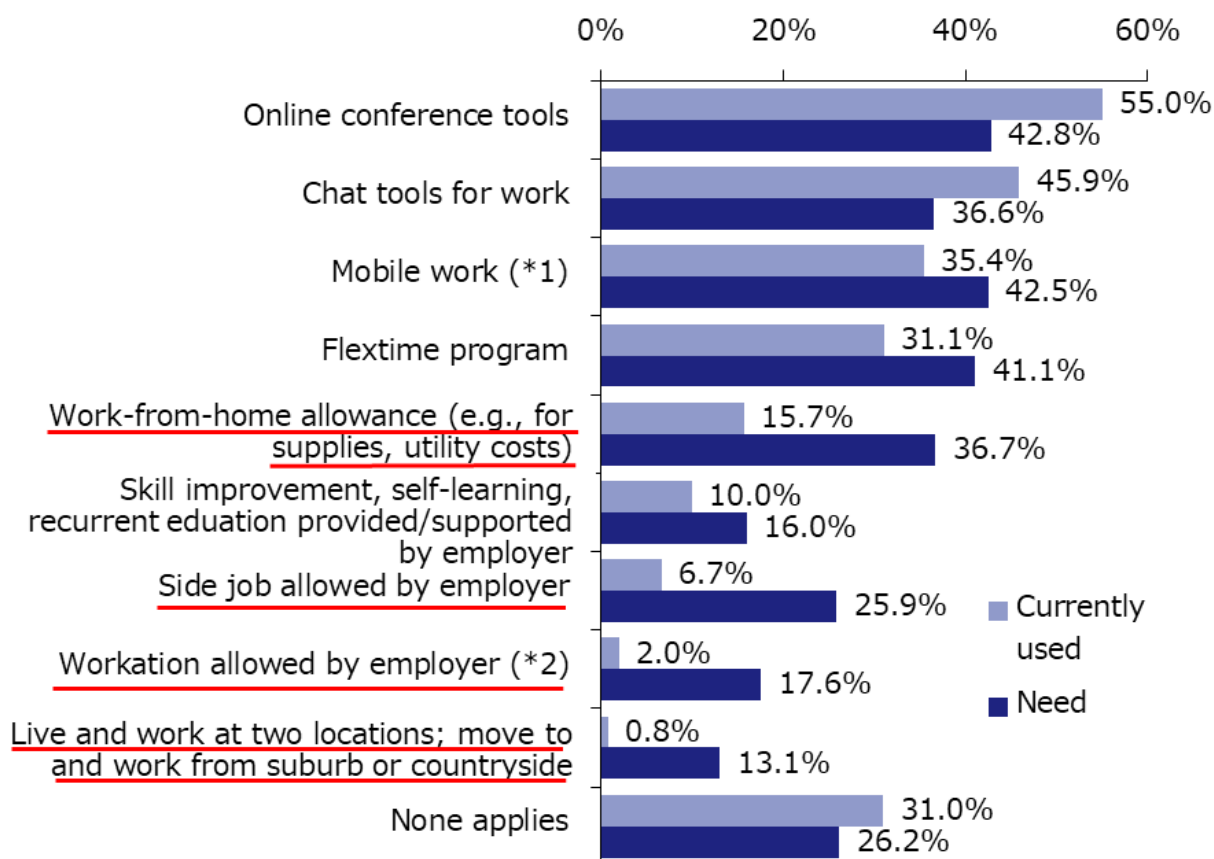
Figure 2: Changes in Frequency of Coming to the Office – By Office Location



topic 3

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 allowance” 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 regions (Figure 3).

Figure 3: <Greater Tokyo> Work Style Initiatives (Currently Used and Need)



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

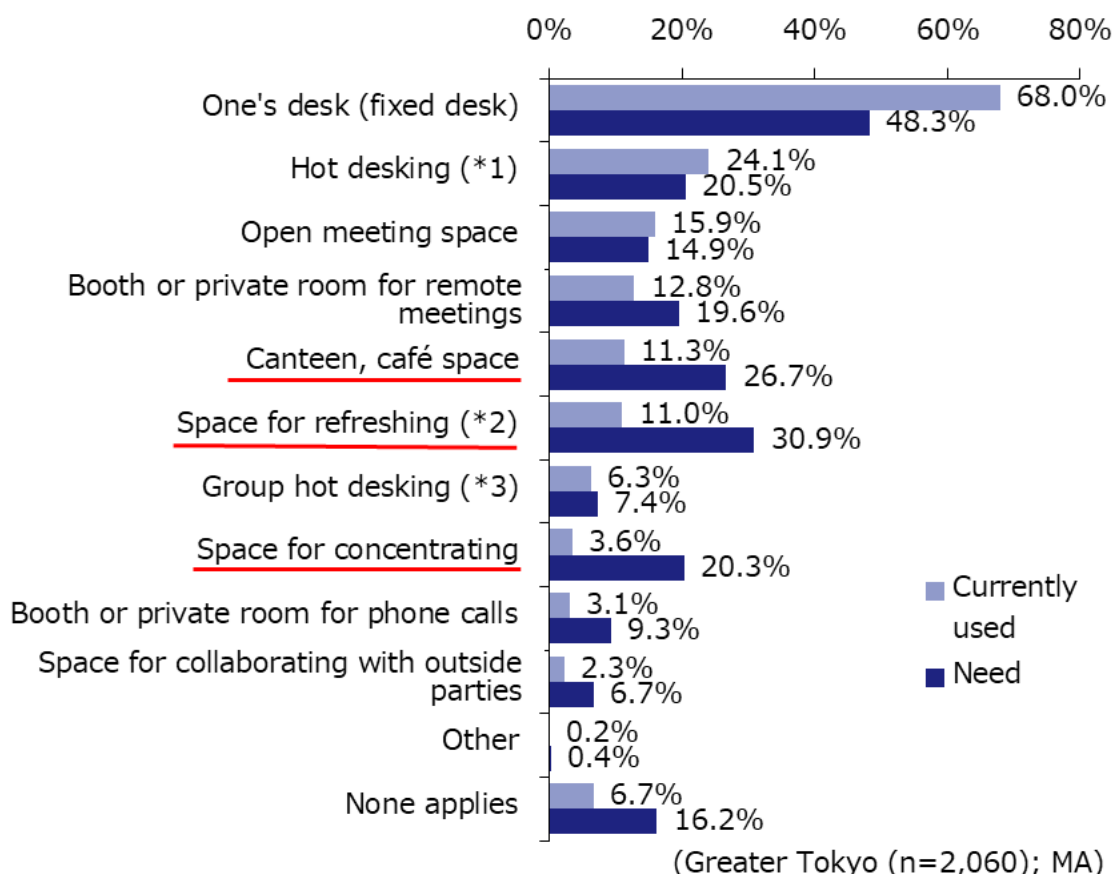
*1 Mobile work: A work style that allows workers to work outside of their designated office in a similar network environment to the office anytime, anywhere using a smartphone, mobile PC or other device.

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

topic 4

A comparison of the current use and the need for layouts in the respondents' regular office shows a large gap in "canteen, café space," "space for refreshing" and "space for concentrating," irrespective of the region, indicating that availability has not kept pace with workers' needs (Figure 4).

Figure 4: <Greater Tokyo> Office Layouts (Currently Used and Need)



*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

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%.
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