

Metropolitan Areas Office Worker Survey 2023 (2) Evaluation of Work Styles <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 evaluation of the current work styles. "(1) Work Style Reality and Needs,"*¹ released on the same day, summarizes the results of the reality and the needs in work styles.

*¹ *Metropolitan Areas Office Worker Survey 2023 (1) Work Style Reality and Needs*, released on December 13, 2023

https://www.xymax.co.jp/english/research/images/pdf/20231213_1.pdf

Main Findings

- Although more than 40% of respondents are "(very/somewhat) satisfied" with their current work style, this can also be interpreted to mean that the majority are not satisfied (**Figure 1-1**). In terms of respondents' performance, engagement with the organization they work for, and stress, by the level of satisfaction with their work style, higher levels of satisfaction led to higher ratings for all items (**Figure 1-2**).
- Among workers who are "(very/somewhat) dissatisfied" with their current work style, their top specific dissatisfactions or issues were "Stressful commute" (49.8%) and "Must come to the office even if the work could be done through telework" (45.1%) (**Figure 2-1**).
- Of respondents' dissatisfactions and issues with their work styles, those related to the inability to telework freely, such as "Must come to the office even if the work could be done through telework," "Working from home now prohibited or restricted" and "Difficult to telework due to atmosphere of workplace or intention of supervisor," had a negative correlation with satisfaction. There was also a negative correlation with "Currently coming to the office full time" and a positive correlation with "Have discretion to choose where to work that day," suggesting that having the option to telework and the discretion to choose where to work affects satisfaction (**Figure 2-2**). However, in reality, more than half of the workers replied that they "don't have (that much)" (51.8%) discretion over where to work (**Figure 2-3**).
- When confirming the reality of work styles by whether the respondent has discretion over where to work, we found that workers with discretion spent more time teleworking and had more options of workplaces in and outside of the office (**Figures 3-1 & 3-2**).

<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

Although more than 40% of respondents are “(very/somewhat) satisfied” with their current work style, this can also be interpreted to mean that the majority are not satisfied (Figure 1-1). In terms of respondents’ performance, engagement with the organization they work for, and stress, by the level of satisfaction with their work style, higher levels of satisfaction led to higher ratings for all items (Figure 1-2).

Figure 1-1: Satisfaction with Current Work Style

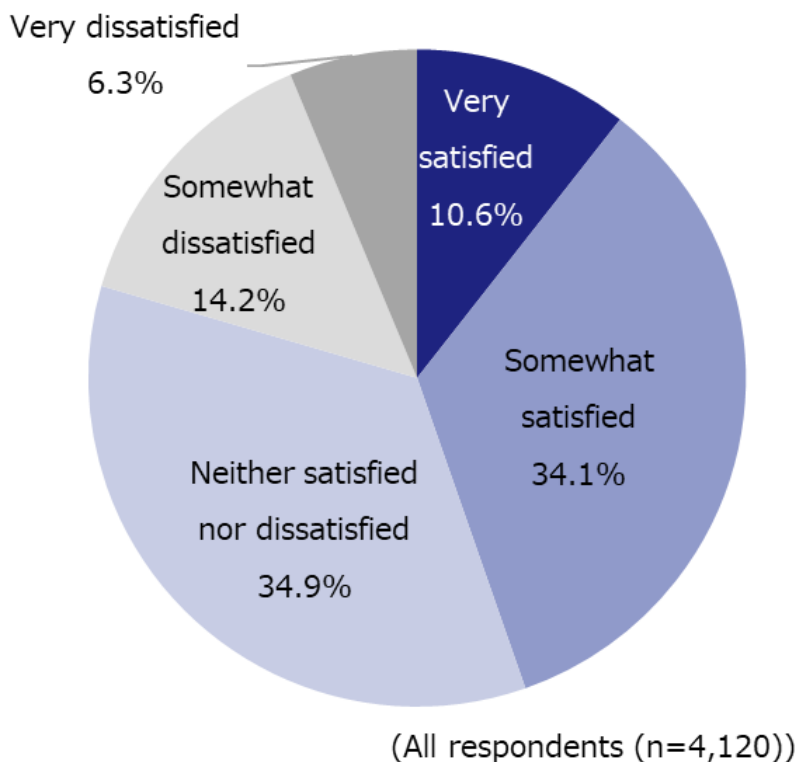
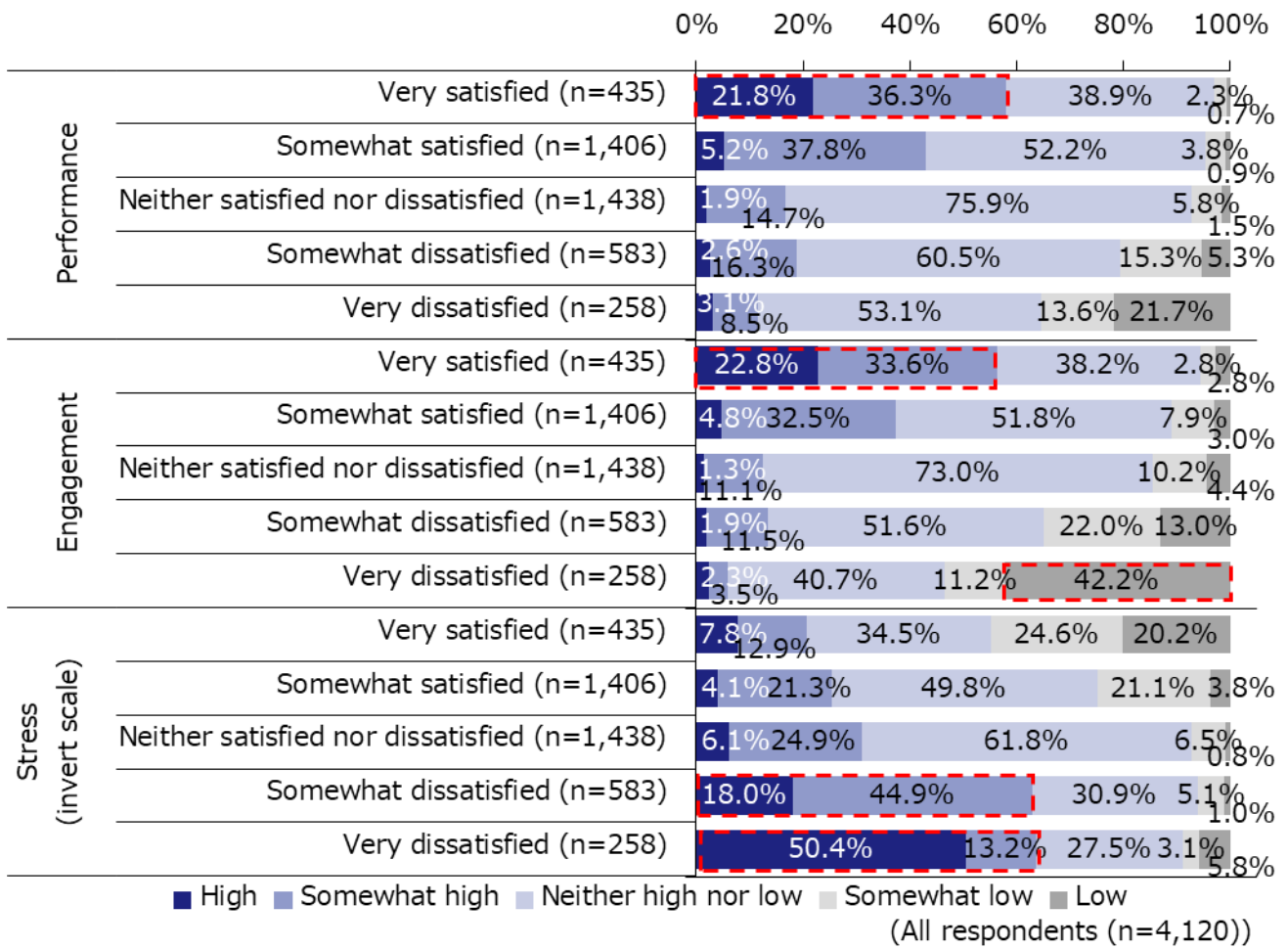


Figure 1-2: Current Performance, Engagement, Stress – By Satisfaction in Work Style

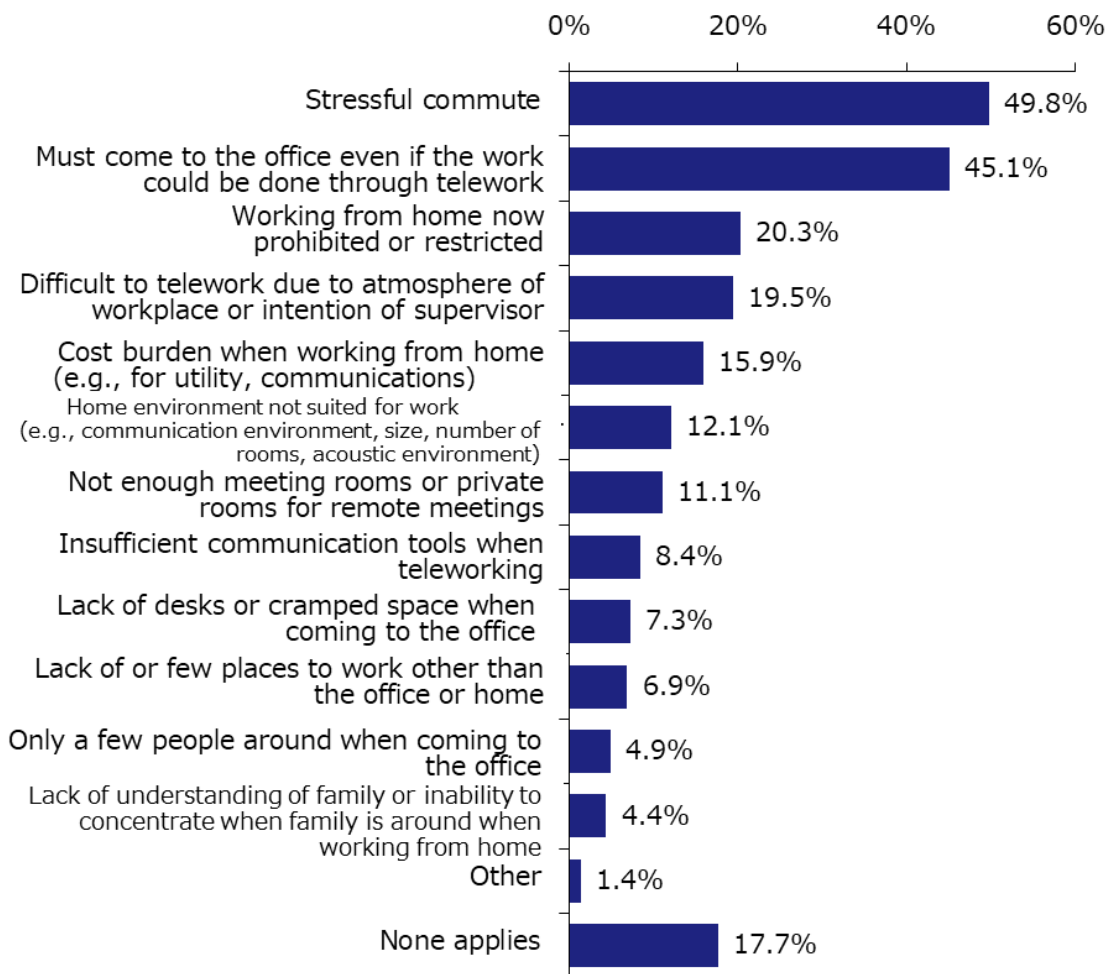


topic 2

Among workers who are “(very/somewhat) dissatisfied” with their current work style, their top specific dissatisfactions or issues were “Stressful commute” (49.8%) and “Must come to the office even if the work could be done through telework” (45.1%) (Figure 2-1).

Of respondents’ dissatisfactions and issues with their work styles, those related to the inability to telework freely, such as “Must come to the office even if the work could be done through telework,” “Working from home now prohibited or restricted” and “Difficult to telework due to atmosphere of workplace or intention of supervisor,” had a negative correlation with satisfaction. There was also a negative correlation with “Currently coming to the office full time” and a positive correlation with “Have discretion to choose where to work that day,” suggesting that having the option to telework and the discretion to choose where to work affects satisfaction (Figure 2-2). However, in reality, more than half of the workers replied that they “don’t have (that much)” (51.8%) discretion over where to work (Figure 2-3).

Figure 2-1: Dissatisfaction or Issue with Current Work Style



(Workers who replied they were “(very/somewhat) dissatisfied” with their current work style (n=841); MA)

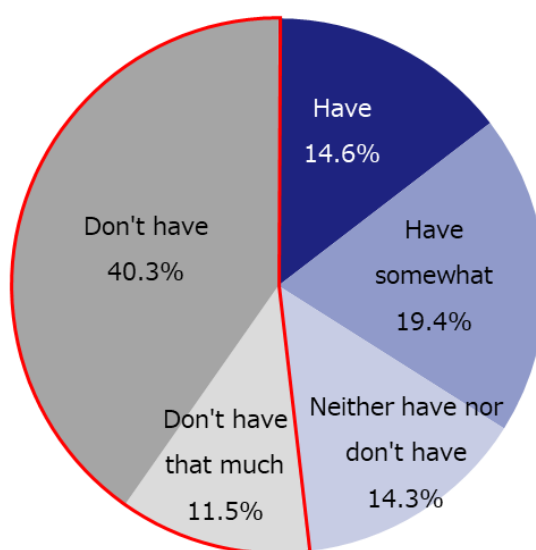
Figure 2-2: Correlation between Current Work Style and Satisfaction

Items that correlate with satisfaction	Correlation factor
(1) Dissatisfaction or issue with current work style	
<u>Must come to the office even if the work could be done through telework</u>	-0.30 ***
<u>Working from home now prohibited or restricted</u>	-0.17 ***
<u>Difficult to telework due to atmosphere of workplace or intention of supervisor</u>	-0.16 ***
Stressful commute	-0.20 ***
(2) Whether coming to the office full time	
<u>Currently coming to the office full time (working in the regular office 100% of work hours)</u>	-0.24 ***
(3) Whether having discretion to choose where to work or not	
<u>Have discretion to choose where to work that day</u>	0.33 ***
(4) Work style initiatives used or implemented	
Mobile work*	0.19 ***
Work-from-home allowance (e.g., for supplies, utility costs)	0.17 ***
Flextime program	0.16 ***
Online conference tools	0.15 ***
Chat tools for work	0.13 ***
Skill improvement, self-learning, recurrent education provided/supported by employer	0.11 ***

*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.

Note: Showing a sample of items with an absolute correlation factor of 0.1 or greater (**p<0.001)

Figure 2-3: Discretion over Where to Work



(All respondents (n=4,120))

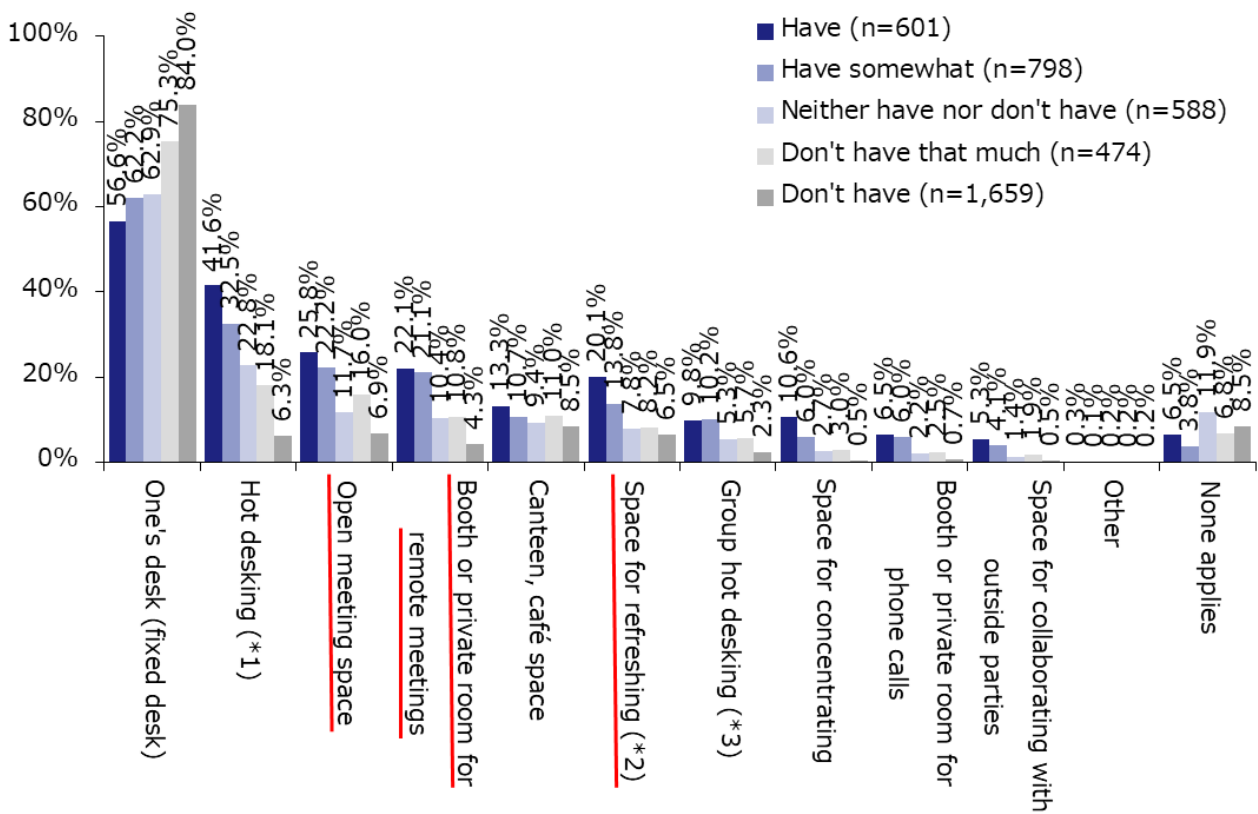
topic 3

When confirming the reality of work styles by whether the respondent has discretion over where to work, we found that workers with discretion spent more time teleworking and had more options of workplaces in and outside of the office.

In terms of the utilization of layouts within the office by discretionary status, workers with discretion over where to work tended to have higher utilization rates of all layouts except for fixed desks, including “open meeting space,” “booth or private room for remote meetings” and “space for refreshing,” indicating they are engaged in Activity Based Working (ABW), where one chooses where to work within the office according to the purpose (Figure 3-1).

In terms of the implementation rate of the telework initiatives of satellite offices and working from home, more than 80% of the group of workers with no discretion over where to work replied “Neither,” while as much as about 20% of the group of workers with discretion used a satellite office (the sum of “Both from SO and from home” and “Only from SO”) (Figure 3-2).

Figure 3-1: Utilization of Layouts within the Office – By Discretionary Status



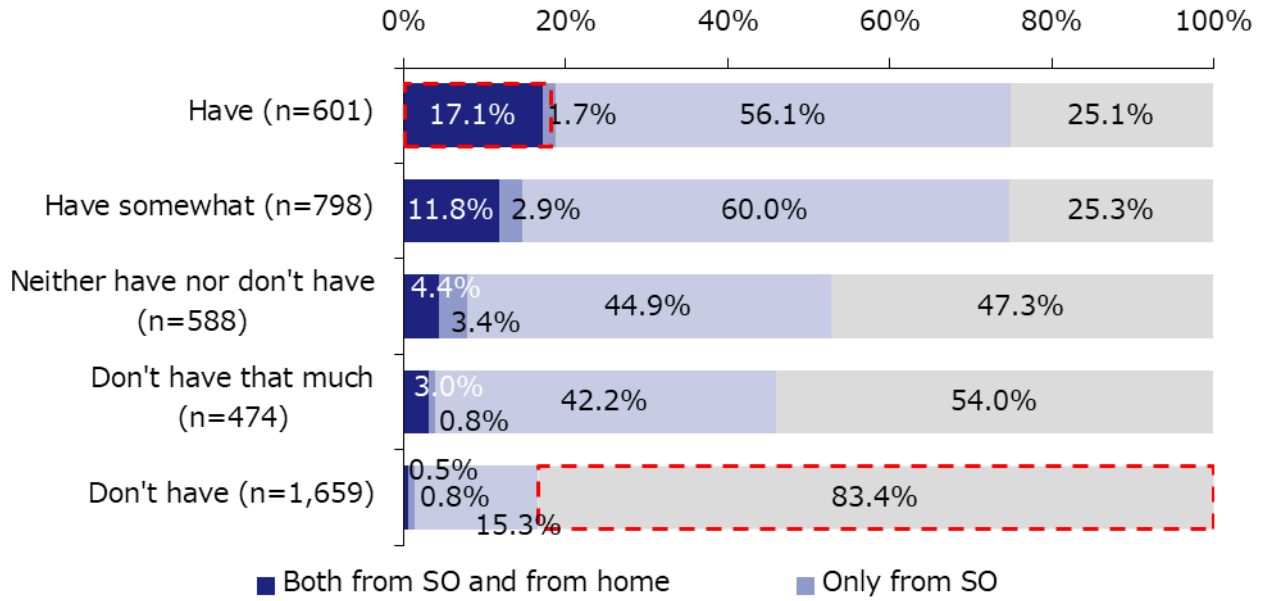
*1 Hot desking: Desks that can be chosen by individuals freely

*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

(All respondents; MA)

Figure 3-2: Implementation Rate of Initiatives on the Place for Telework – By Discretionary Status



(All respondents) SO: Satellite office*
 *Satellite office: A collective term for workplaces provided for telework apart from the worker’s regular office or home.

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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