2021

Analysis of the Labour Economy

—Impact of COVID-19 on Employment and Labour —

〔Outline〕

Main point of the 2021 Analysis of the Labour Economy (1)

Impact of COVID-19 on employment and labour, etc.

○ The number of employees has declined mainly in personal services industries such as accommodations, eating and drinking services.（⇒P10）

- The number of employees in the accommodations, eating and drinking services industry: a decline of 250,000 on average in 2020 from 2019 (2019: 3.64 million → 2020: 3.39 million)
- The largest decrease in the number of employees recorded in the manufacturing industry during the financial crisis: a decline of 600,000 on average in 2009 from 2008 (2008: 10.84 million → 2009: 10.24 million)

○ The number of female regular employees has increased in industries such as medical, health care and welfare. Meanwhile, the number of female non-regular employees has decreased especially in industries such as accommodations, eating and drinking services.（⇒P11）

- During the financial crisis, the numbers of male regular and non-regular employees decreased noticeably.

○ The numbers of students and females in child-rearing households who are not in the labour force have increased.（⇒P12-13）

- There was a significant increase in the second quarter of 2020.
- The overall number of persons not in the labour force returned to the 2019 level by December 2020.

○ A decline in the wage income of employees during the pandemic is smaller than that during the financial crisis due to the government's relief measures.

⇒ It is estimated that the unemployment rate was down by 2.6 percentage points between April and October 2020 as special measures were taken for the employment adjustment subsidy program, etc.（⇒P6-8）

- Meanwhile, expenditures such as employment adjustment subsidies have been placing financial strains on the employment insurance, slowing the movement of workers to fast-growing sectors.

○ In 2019, the total number of hours worked per month decreased and the leave acquisition rate increased. In 2020, special cash earnings of part-time-workers increased. Besides the impact of the COVID-19 pandemic, progress in work-style reform is behind such trends.（⇒P9）

Main point of the 2021 Analysis of the Labour Economy (2)

Analysis of workers who were required to continue working during the pandemic (analysis based on new questionnaire surveys)

○ In industries such as medical and other health services, social insurance, social welfare and care services, physical and mental burdens have increased, especially among female workers.（⇒P16）

○ Employees working for employers who have taken COVID-19 response measures are more likely to report an increase in the level of job satisfaction. Such measures are: complying with sectoral guidelines, boosting staffing levels and allowing flexible work schedules.（⇒P17）

Analysis of workers who teleworked (analysis based on new questionnaire surveys)

○ Enterprises that were already implementing telework prior to the pandemic are more likely than those that introduced telework during the pandemic to continue to implement telework. The same holds true for employees who were already teleworking before the pandemic. They are more likely than those who started teleworking during the pandemic to continue teleworking.（⇒P18（１））
※ The percentage of workers who continued to telework as of December 2020: 82.2% of workers who were teleworking before the pandemic and 56.7% of those who began teleworking during the pandemic

○ Productivity and satisfaction of teleworking are lower than those of working in the office in general. However, the difference between productivity and satisfaction of teleworking and those of working in the office is smaller among workers who were already teleworking before the pandemic than among those who began teleworking during the pandemic for the first time.（⇒P18（２））

○ Fulfillment and satisfaction of teleworking among workers increase when enterprises make management efforts and try to improve teleworking environment. Such efforts include clarifying the scope of work responsibility, deadlines and evaluation standards as well as giving workers a certain degree of discretion to work autonomously.（⇒P20（２））

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Ⅱ. Analysis of workers who were required to continue working during the pandemic (analysis based on new questionnaire surveys)

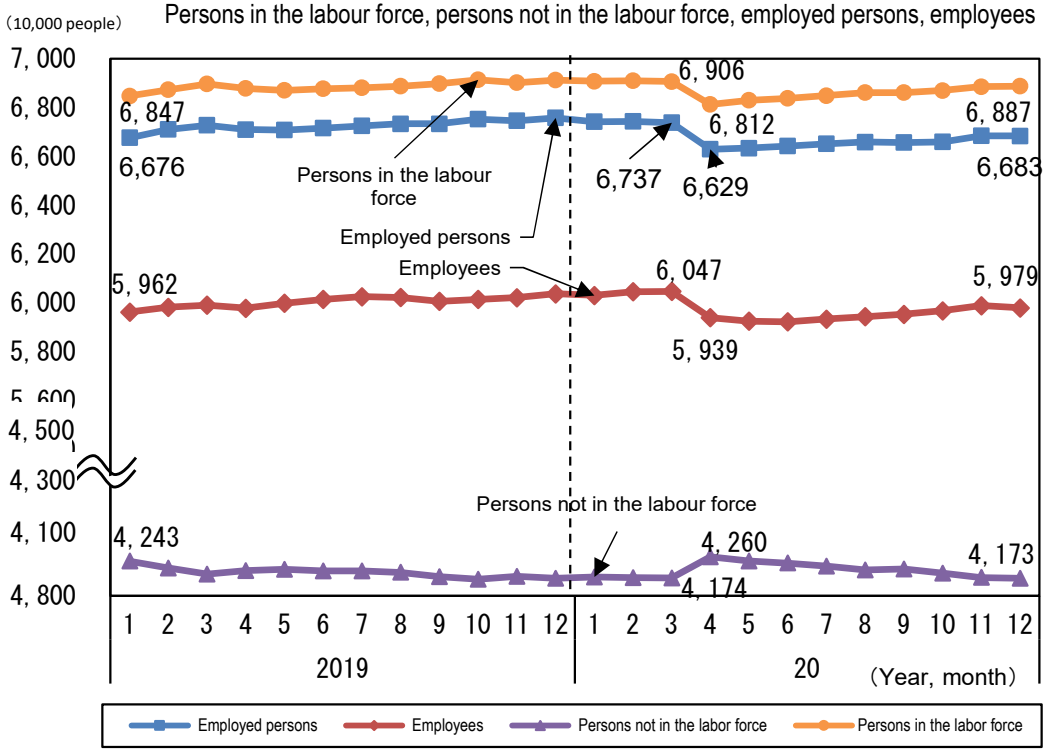
Ⅲ. Analysis of workers who teleworked (analysis based on new questionnaire surveys)

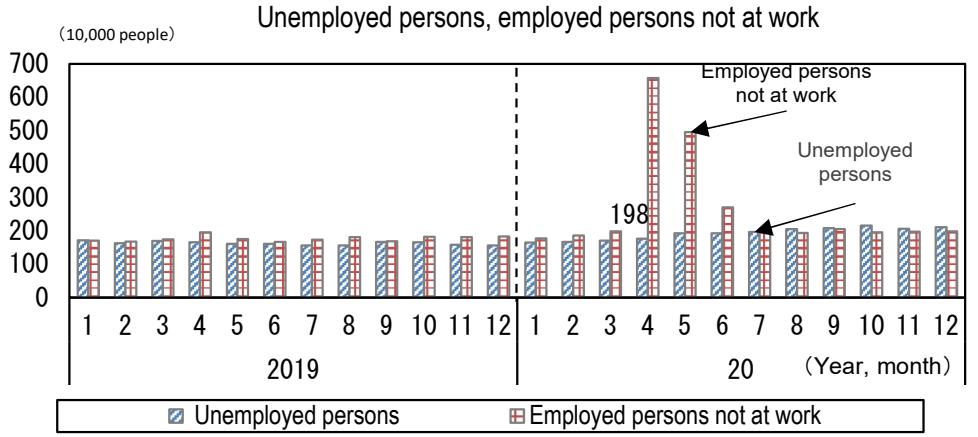
※ This report provides an analysis of the trends in the labour economy in 2019 and 2020 since the Ministry of Health, Labour and Welfare did not release analysis of 2020 in light of the significant impact of the COVID-19 pandemic on the labour economy in FY2020.

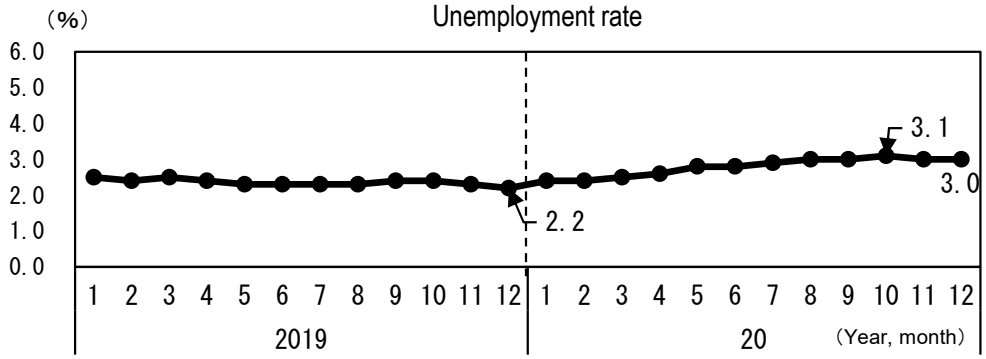
Ⅰ. Impact of COVID-19 on Employment and Labour
-Overall Situation in the Labour Market (1) (Employment and Unemployment) -

- In April 2020, the numbers of employed persons and employees both declined by about 1 million as measures against COVID-19 limited economic activities. The figures then climbed slightly but did not return to the pre-pandemic levels by the end of 2020. Meanwhile, the number of persons not in the labour force increased significantly by about 1 million in April 2020 but declined moderately to the pre-pandemic level by the end of 2020.
- The number of employed persons not at work surged by 4.2 million in April 2020 from the same month in 2019. It began to decline in May, and continued to fall through August, then leveled off thereafter. The number of employed person not at work was up about 140,000 in August 2020 from a year earlier.
- The numbers of employed persons and employees declined. However, the figure for unemployed persons increased moderately, while the unemployment rate rose slowly to reach 3.1% in October.

Workforce overview



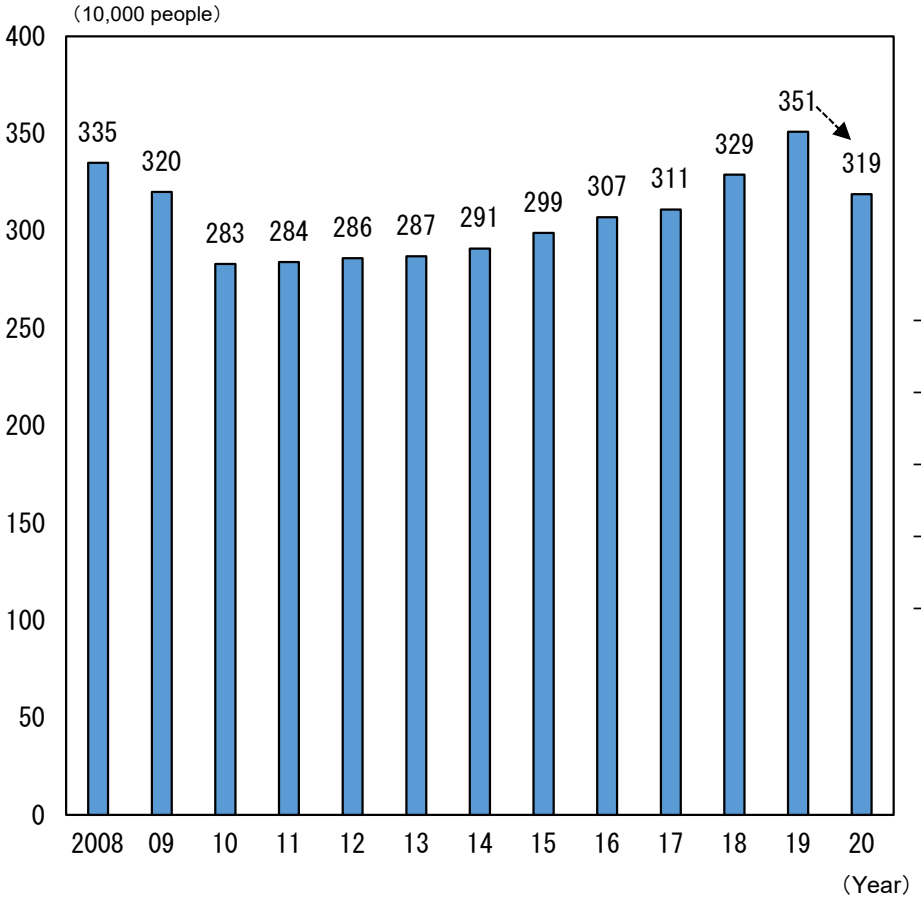




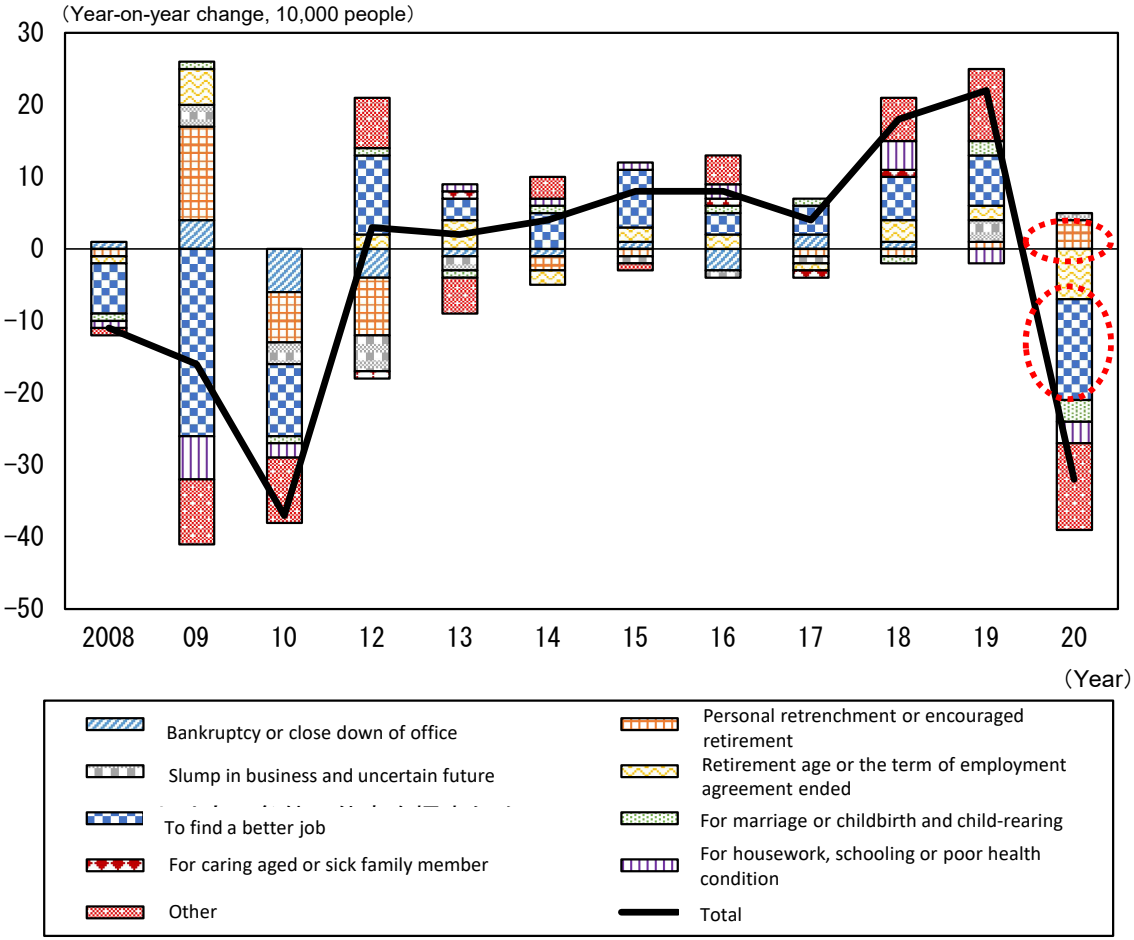
Ⅰ Overall Situation in the Labour Market (2) (Trend in People Who Changed Jobs)

- The number of people who changed their jobs (those who left employment within the past year) dropped significantly to 320,000 in 2020 due to the impact of the COVID-19 pandemic. That's the first decline in 10 years.
- The number of people who moved to another job after quitting work for such reasons as personnel restructuring and encouraged retirement increased in 2020 compared with the previous year , while the number of those who switched their jobs to find a better job declined significantly in 2020 from a year earlier.

（1）Number of people who changed jobs



（2） Number of people who changed jobs by reason why they left their previous job



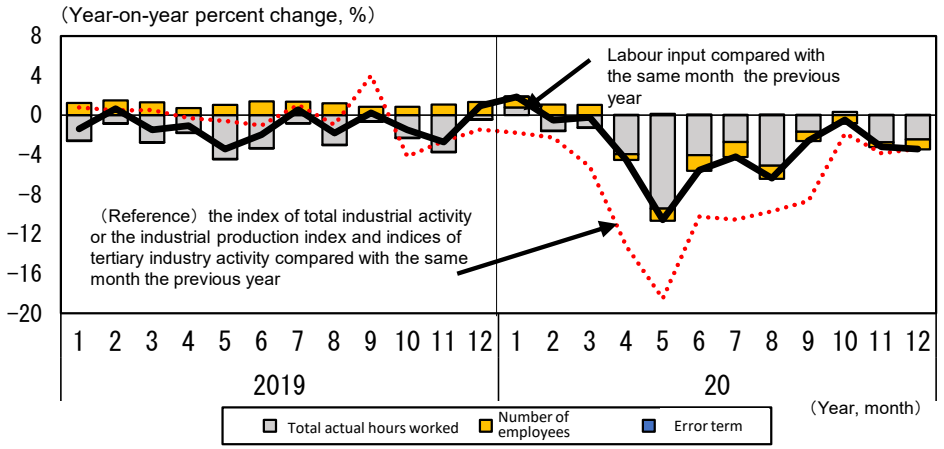
(Note) People who changed jobs refer to those who quit a job at any point in the past year and are now employed.

Ⅰ Overall Situation in the labour Market (3) （Labour Input and Wage Income of Employees）

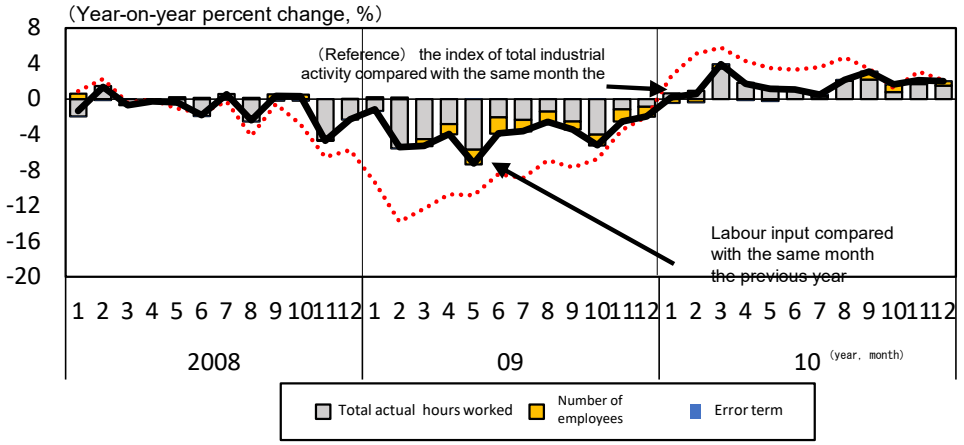
- The labour input (the number of employees × hours worked per employee） declined steeply in May 2020 and was still below the previous year's level in December. The decline in May 2020 was larger than the decline in May 2009, the biggest drop during the financial crisis.
- The decrease in the compensation of employees (the number of employees × the amount of wage per employee) during the pandemic is smaller than that during the financial crisis.
- The trend suggests that companies' efforts to maintain wages and employment as well as measures taken by the government to support such firms have had a positive impact.

（１）Labour input

During the COVID-19 pandemic

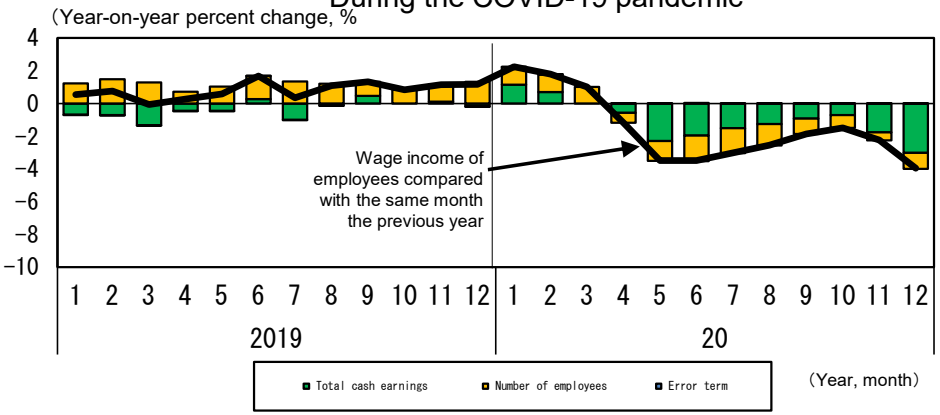


(Reference) During the financial crisis

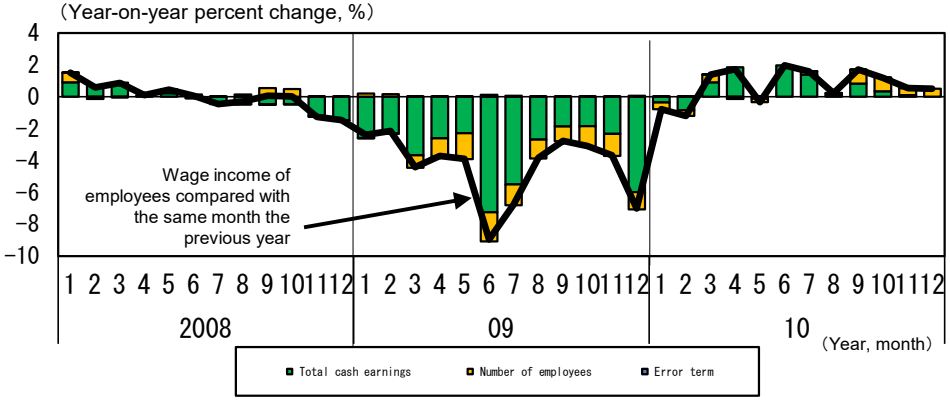


（２）Compensation of employees

During the COVID-19 pandemic



(Reference) During the financial crisis



I Employment Adjustment Subsidy, etc. for Pandemic Response (1) (Special Measures and Determined Payment Amount)

- The government has taken special measures for the employment adjustment subsidy and the emergency employment security subsidy throughout the emergency response period that started on April 1, 2020. The aim is to support employers trying to keep their employees amid the pandemic. Under the special measures, the government has expanded the subsidy coverage and raised the upper limit on the daily subsidy amounts.-In addition, a leave of absence taken by workers not covered by employment insurance is also subsidized through the emergency package of employment security.
- The peak of monthly determined payment during the pandemic exceeds that offered during the financial crisis, and the pace of increase in the payment amount is faster than that during the financial crisis. The determined payment amount reached about 570 billion yen in August 2020. It has remained higher than that during the financial crisis.

（１） Special Measures for the Employment Adjustment Subsidy (overview)

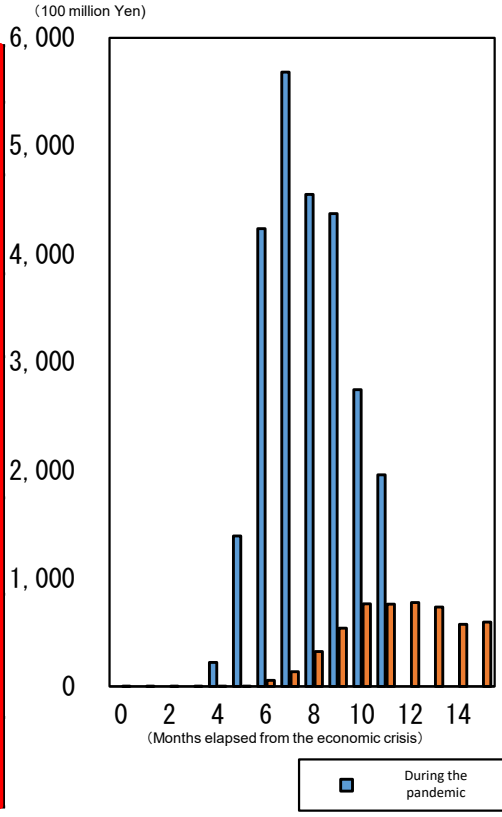
○ The employment adjustment subsidy scheme is a support program that subsidizes part of leave allowance paid by a employer to employees. A subsidy application is accepted when employees put on paid leave are covered by employment insurance. But under the special measures, emergency employment security subsidies are given to employers who meet certain requirements even if workers are not insured.

Details on special measures for the Employment Adjustment Subsidy （April – December 2020）

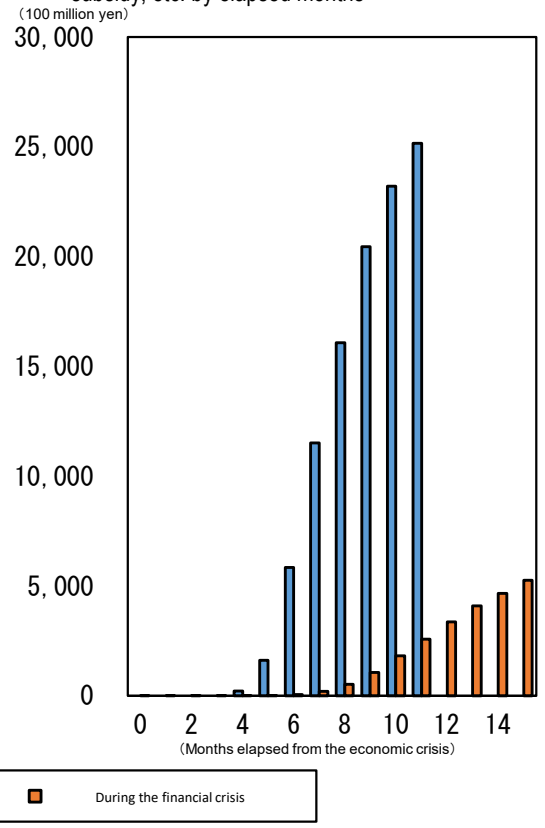
	The Employment Adjustment Subsidy other than special measures	Special measures for the Employment Adjustment Subsidy
Eligible enterprises	Enterprises that have reduced business activity due to economic hardship	All enterprises affected by the COVID-19 crisis (in all industries)
Production indicator requirement (sales, etc.)	Production in the last 3 months dropped by 10% or more compared to the same period in the previous year	Production in the last 1 month dropped by 5% or more compared to the same period in the previous year
coverage	Employees insured by the employment insurance	All employees, including workers who are not insured (emergency employment security subsidy)
Subsidy rate	2/3 (small-and medium-sized companies) 1/2 (large companies)	4/5(small-and medium-sized companies), 2/3(large companies) ※ If employers do not layoff any employees : 10/10 (small-and medium-sized companies), 3/4 (large companies)
Maximum amount per day	8,370 yen	15,000 yen
Submission of the implementation plan for employment adjustment	Necessary	Not necessary
Maximum duration of subsidy payment	100 days for one year or 150 days for 3 years	Same as the left ＋days of closure, etc. during the period for emergency response

（２） Determined payment amount of the employment adjustment subsidy, etc.

Determined payment amount of the employment adjustment subsidy, etc. by elapsed months



Determined payment amount of the employment adjustment subsidy, etc. by elapsed months

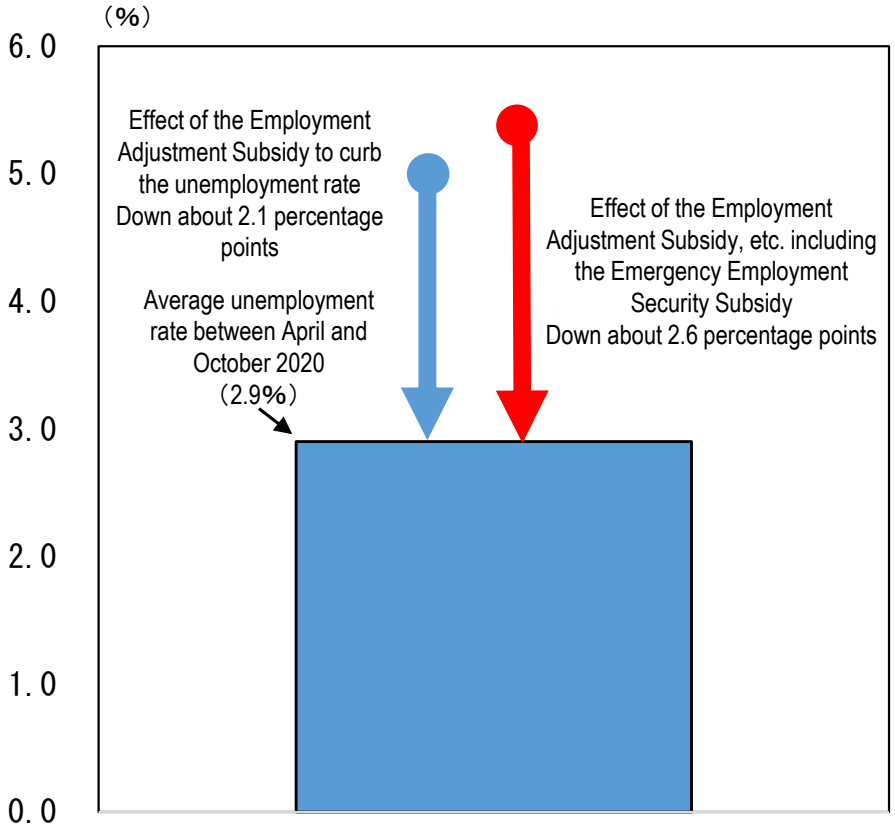


(Note) The payment amount during the pandemic in chart 2 is the total amount of the employment adjustment subsidy and emergency employment security subsidy. Subsidy payments during the pandemic represent the determined payment amount, and those during the financial crisis represent the amount actually paid. The amounts of subsidies are compared according to the number of months elapsed from a certain month: from January 2020 for the data during the pandemic and from September 2008 for the data during the financial crisis.

Ⅰ －Employment Adjustment Subsidy, etc. for Pandemic Response (2) (Effects of measures for curbing unemployment)－

- According to an estimate of the effects of the employment adjustment subsidy, etc. to curb unemployment, the payment of subsidies reduced the unemployment rate by 2.6 percentage points between April and October in 2020. (A considerable margin of error needs to be taken into account since the estimated figure is calculated based on certain assumptions.)

※ Those subsidy payouts do not only have positive effects. There are also negative effects: subsidy payouts can prevent workers from moving into fast-growing sectors and cause severe financial strains on the employment insurance system.



● Estimation methods

※The estimation period is set at seven months from April through October 2020.
Calculations of estimates of effects of the subsidies were made based on sample data obtained during the period.

（1）Average amount paid per person per day

Average amount of subsidy per person per day（yen/person, day）＝determined payment amount / the number of leave days for which payment was made (person, day)

（2）Total amount of payment during the period

Based on the correlation between the determination base period and the payment decision date in the sample survey, the total amount of payment up to the end of December 2020 was used; based on assumption that those with the determination base period up to October 2020 were paid by the end of December 2020 on average.

（3）Average total number of days of leave per month

The average total number of days of leave per month＝total amount paid during the period / average payment amount per person per day / 7

※The payments are divided by 7 because the calculation is made based on the base period for the determination from April to October.

（4）Average number of workers eligible for the employment adjustment subsidy, etc. on a monthly basis

Average number of workers eligible for the employment adjustment subsidy, etc. on a monthly basis＝ average total number of days of leave per month / average number of scheduled working days per month

※The monthly average number of scheduled working days is calculated using the total annual number of days off (worker average) stated in the MHLW's 2020 General Survey on Working Conditions.

（5）Effects of subsidies to curb unemployment

Effects of subsidies to curb a rise in the monthly average unemployment rate＝average number of workers eligible for the employment adjustment subsidy, etc. on a monthly basis / monthly average labour force (average between April and October)

※The calculation assumes that all the workers eligible for the employment adjustment subsidy, etc. would become unemployed if subsidies were not provided.

●Reports regarding analysis on the effects of the employment adjustment subsidy, etc. other than this paper

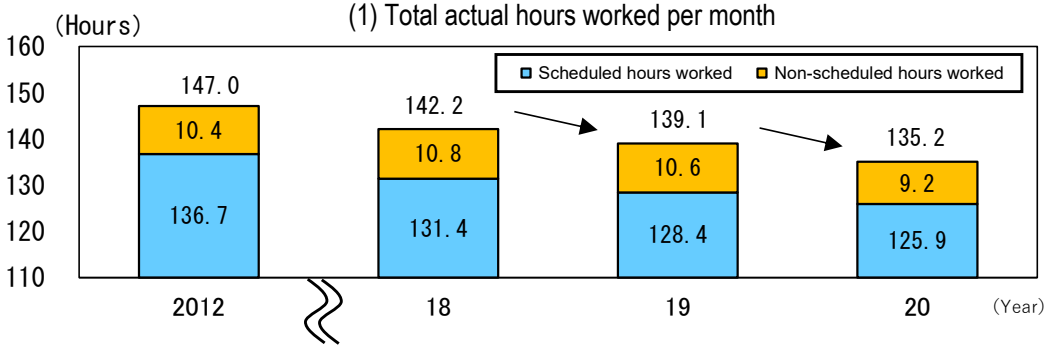
- A report (2007) by the Japan Institute for Labour Policy and Training (JILPT) estimates that the payment of the employment adjustment subsidy reduced the unemployment rate by about 0.8-1.0 percentage points in the second quarter of 2009 during the financial crisis.
- According to the Cabinet Office's estimate (2021), the payment of the employment adjustment subsidy reduced the unemployment rate by about 2.0-3.0 percentage points in each quarter between the second and fourth quarters of 2020 although a considerable margin of error needs to be taken into account.

Source: Data on actual payments of employment adjustment subsidy, etc. published by MHLW; sample survey conducted by the Employment Security Bureau of MHLW; "Labour Force Survey (Basic Tabulation)", MIC; "General Survey on Working Conditions", MHLW.

Ⅰ —Trend in Hours Worked, Leave Acquisition and Wages Based on Indicators Related to Work-Style Reform —

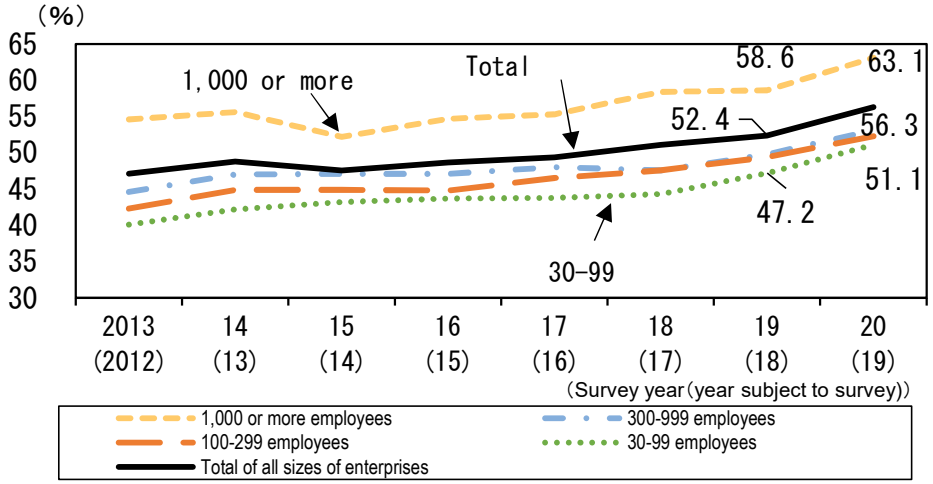
- Hours worked declined significantly in 2019 and 2020 thanks to the work-style reform legislation. It sets rules on maximum overtime hours and leave acquisition. The overtime cap came into force in April 2019 for large companies and in April 2020 for small and medium-sized businesses, while the compulsory 5-days paid leave a year was introduced in April 2020. The percentage of employees who work 60 hours or more a week, mainly male workers, was also on the decline. The acquisition rate of paid leave rose sharply in all sizes of companies in 2019, according to a survey conducted in 2020.
- The increase is Special cash earnings of part-time workers increased in 2020 despite the negative effects of the COVID-19 outbreak on wages. attributed to the rules on equal pay for equal work (to ensure equal treatment regardless of types of employment) set by the work-style reform legislation. Equal pay for equal work regulations came into effect in April 2020 for large firms and in April 2021 for small and medium-sized companies.

(1) Total actual hours worked per month

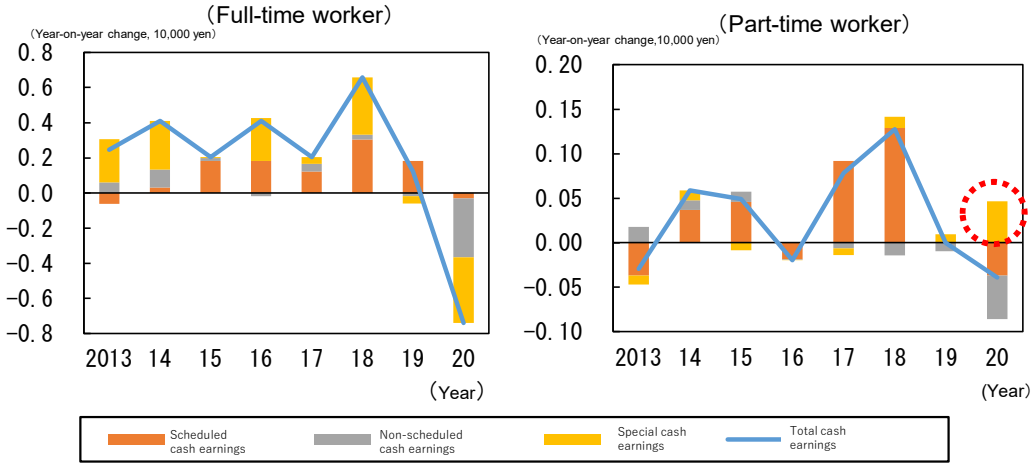


(2) Percentage of people who worked 60 hours or more per week

(3) Acquisition rate of paid leave



(4) Total cash earnings (year-on-year change)

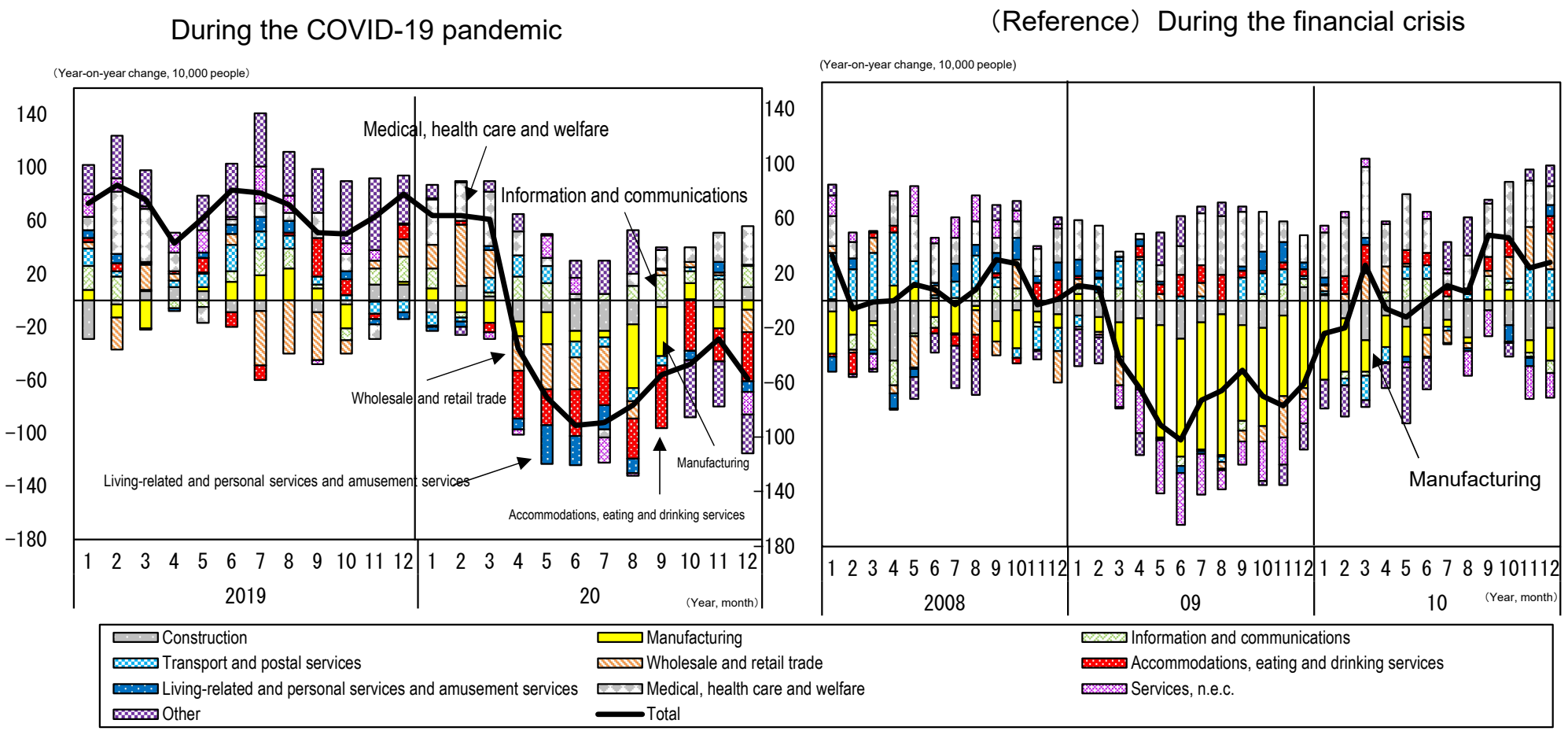


(Note) Chart 3 shows aggregate acquisition rates of paid leave taken by employees in the year before the survey year.

Ⅰ —Increase or Decrease in the Number of Employees by Industry—

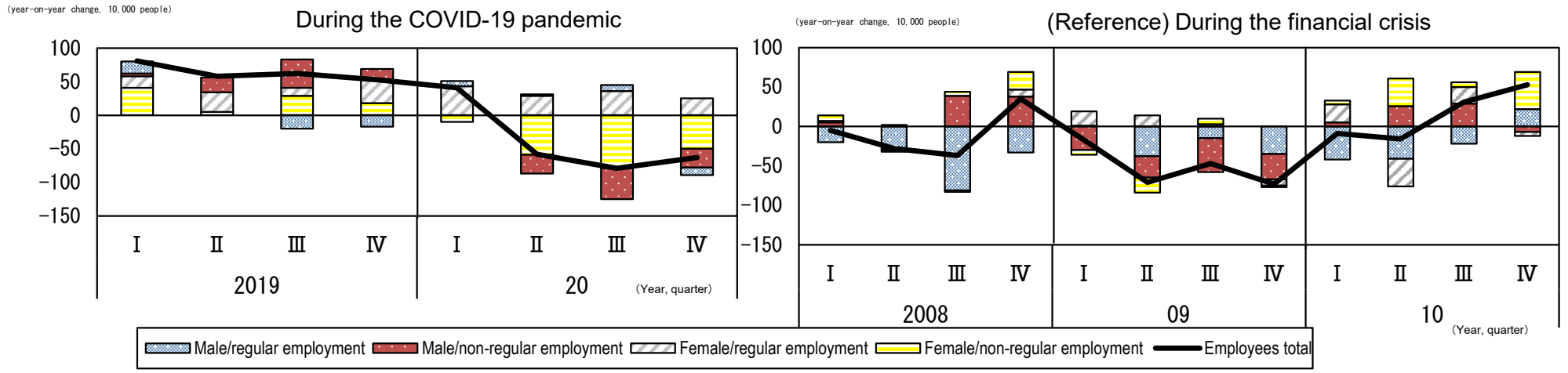
- According to the data below on the year-over-year changes in employment by industry, the number of employees steadily increased during the pandemic in some industries such as information and communications, and medical, health care and welfare, while the accommodations, eating and drinking services, wholesale and retail trade, living-related and personal services and amusement services industries experienced a sharp drop in the number of employees. In contrast, the manufacturing industry saw a significant decline during the financial crisis.

Number of employees by industry

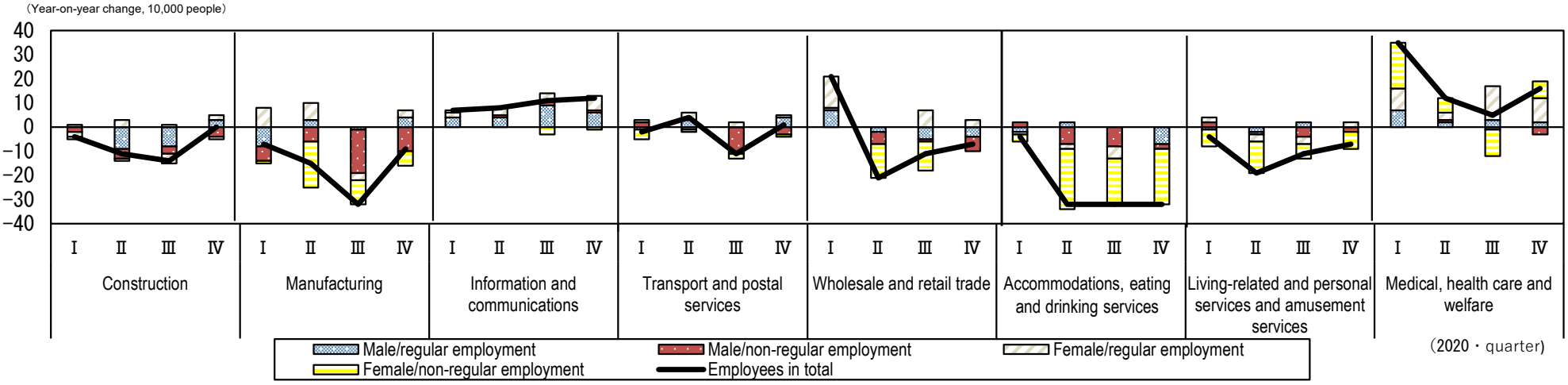


- The data below on the number of employees by gender and employment type (changes from the same period of the previous year) show that while the number of female regular employees increased in 2020, the figure for non-regular workers -both men and women- decreased and the decline was significant especially for women. The trend in 2020 is different from that seen during the financial crisis, the period in which the number of male regular and non-regular workers dropped significantly.
- The data on the number of employees by industry (changes from the previous year) show a considerable decline in the number of female non- regular workers in the accommodations, eating and drinking services, manufacturing, wholesale and retail trade, living-related and personal services and amusement services industries and a significant drop in the number of male non-regular workers in the manufacturing industry.

（１）Number of employees by gender and type of employment



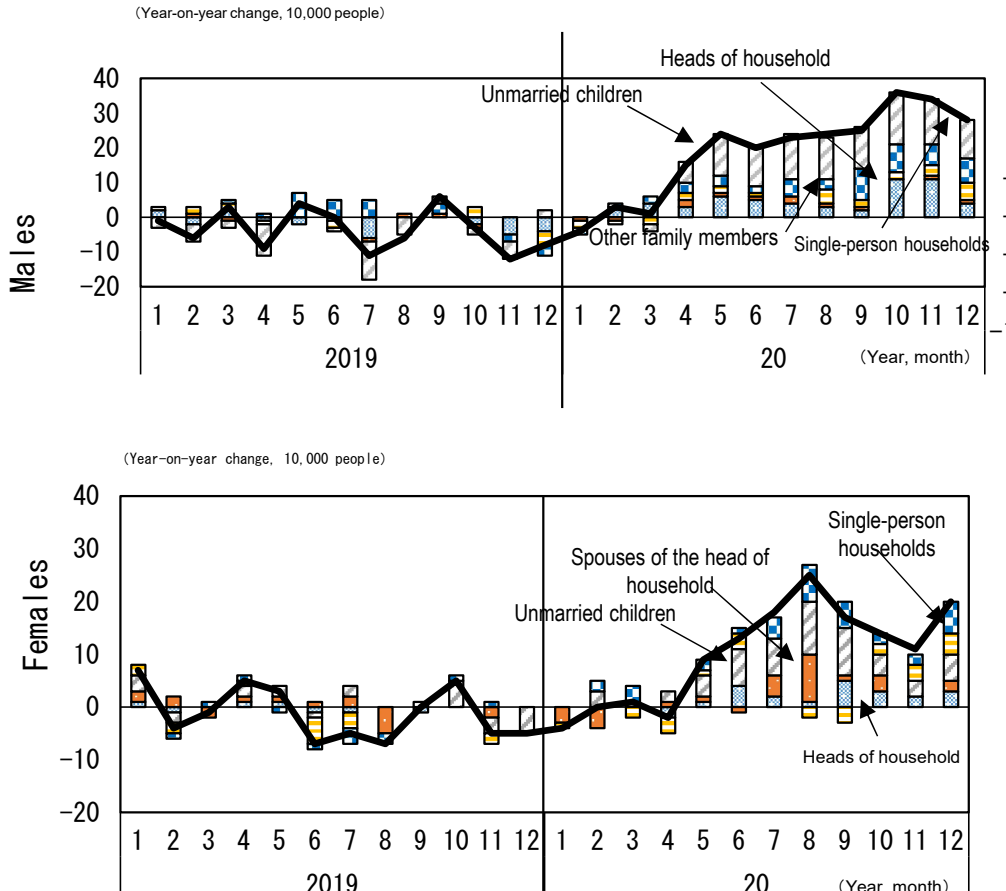
（２）Number of employees by gender, industry, type of employment（2020）



I —Trend by labour Force Characteristics (2) (Trend in the Numbers of Unemployed Persons and People Not in the Labour Force by Gender and Relationship to the Head of Household)—

- The data on the numbers of unemployed persons and people who are not in the labour force by gender and the relationship to the head of household (changes from the same period of the previous year) show that unemployment began to rise markedly in April 2020 among unmarried children – both men and women – of the head of household as well as men and women in sing-person households. The number of persons not in the labour force among unmarried children – both men and women – also started increasing significantly in April 2020.
- The number of unemployed persons increased significantly among male heads of household. Meanwhile, among female spouses of the head of household and female heads of household, the number of those who were not in the labour force began to rise markedly in April 2020, and the number of those unemployed increased significantly in the second half of the year.

（1）Number of unemployed persons by gender and relationship to the head of household

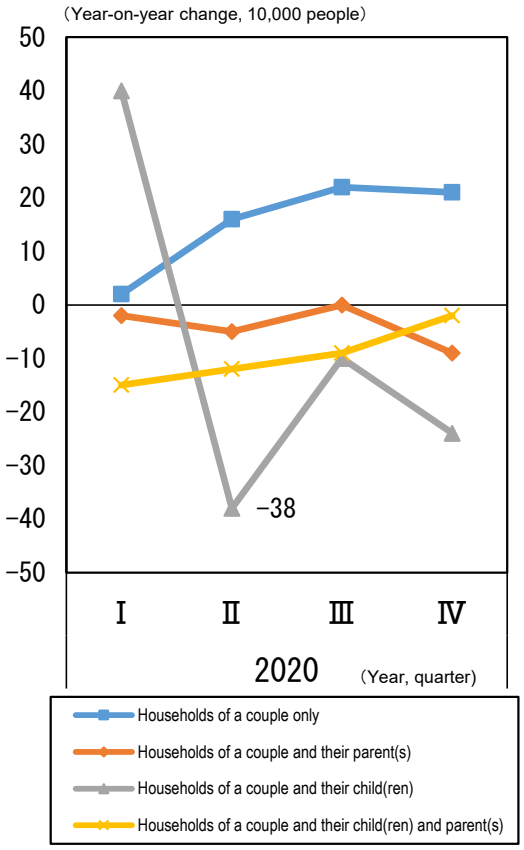


（2）Number of people who are not in the labour force by gender and relationship to the head of household

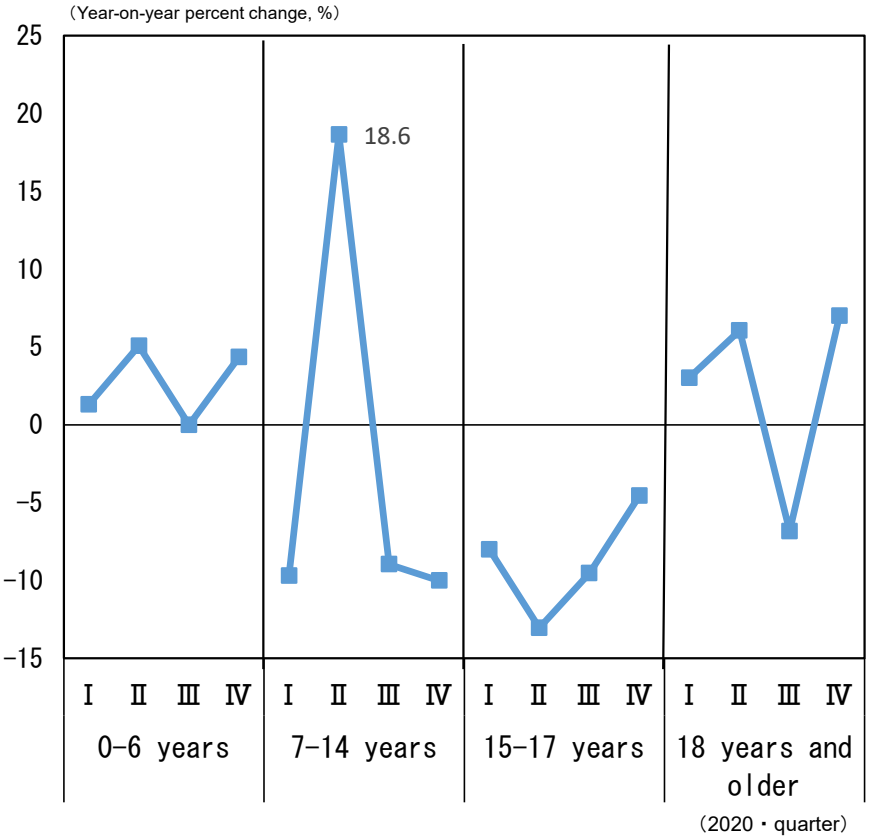
Ⅰ —Trend by labour Force Characteristics (3) (Trend in the Number of People Who Are Not in the labour Force: Females Living in Households Raising Children and Students)—

- Among married females living in households that comprise a couple and children, the number of those employed plunged in the second quarter of 2020 by 380,000 from the previous year.
- Among married females whose youngest child is age 7-14, the number of those not in the labour force surged in the second quarter of 2020 by 18.6% from a year earlier. The figure then began to decline.
- The number of students not in the labour force soared in the second quarter of 2020 by 120,000 from the previous year. Those students were not in the labour force even in the third quarter and beyond.

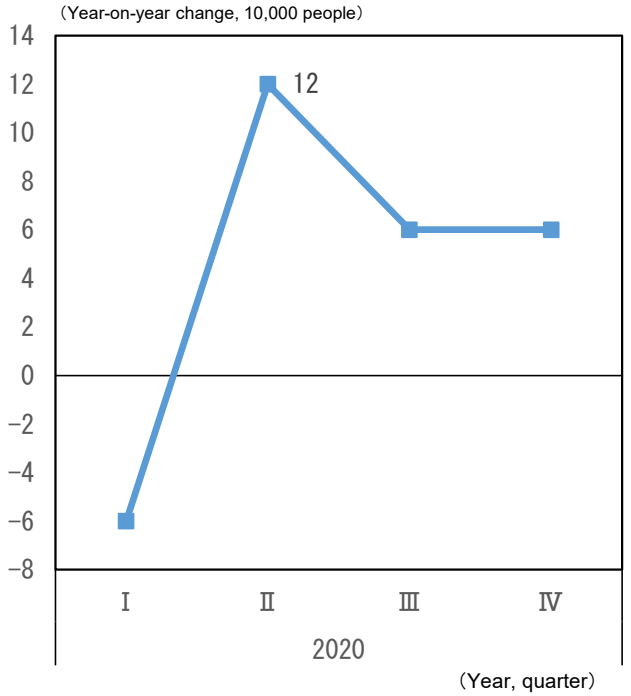
(1) Number of employed married females by type of household



(2) Number of married females who are not in the labour force by age of their youngest child



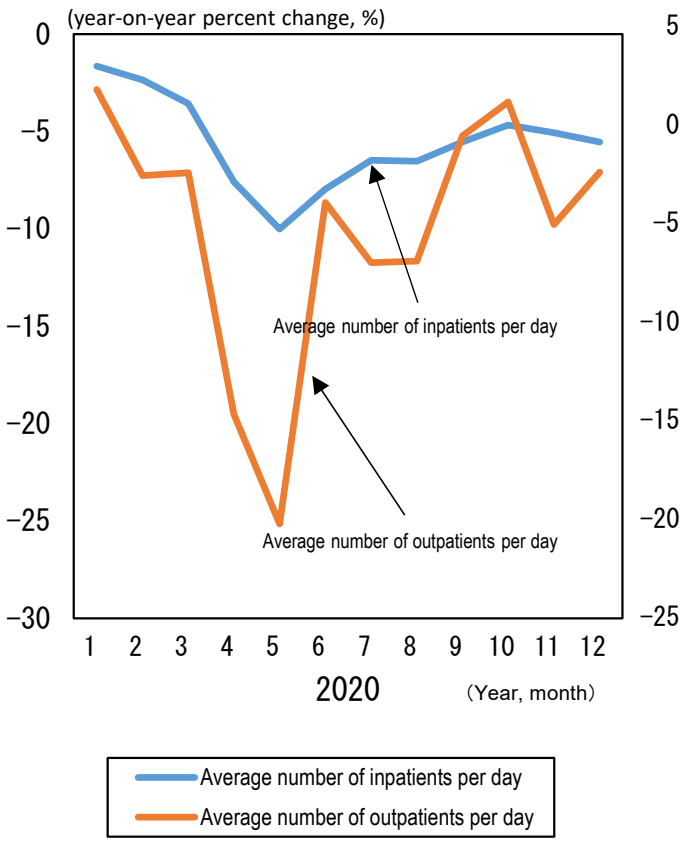
(3) Number of students not in the labour force



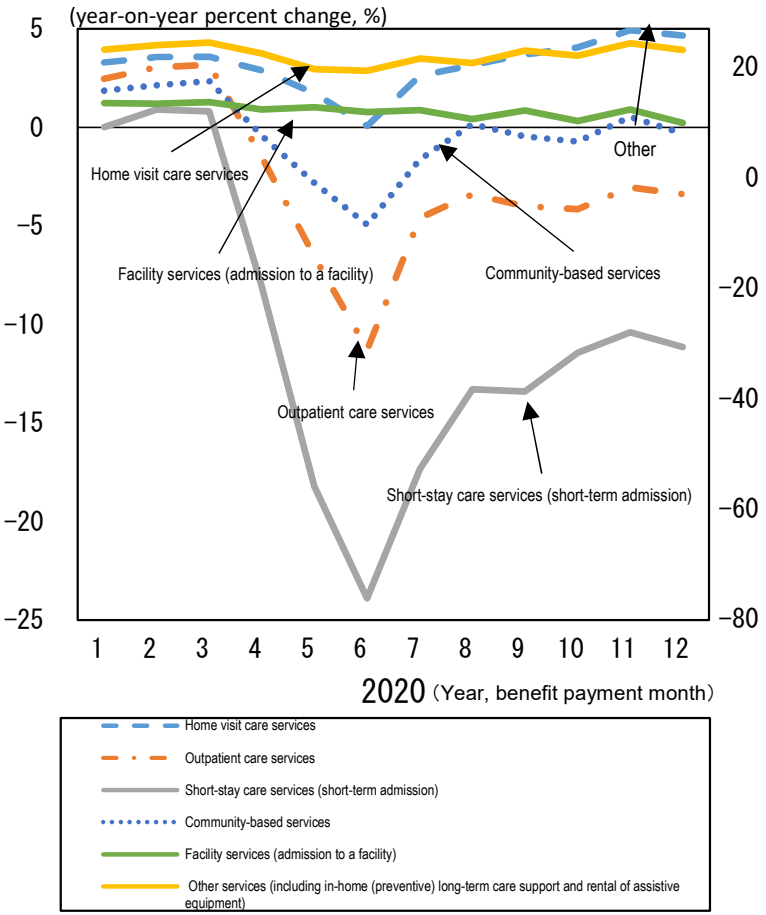
Ⅱ. Analysis of Workers Who Were Required to Continue Working during the Pandemic (Analysis based on New Questionnaire Surveys)
- Analysis Focusing on the Medical and Other Health Services, Care Services, and Retail Trade Industries (1) (Use of Services and Consumption Behavior) -

- Workers in some sectors kept providing essential services to maintain the stability of people's lives and the national economy even when the country was under a state of emergency, including the state of emergency declared in April and May 2020.
- The data below show how service user behavior changed during the pandemic in the medical and other health services, care services and retail trade industries. In the medical and other health services industry, the average number of outpatients per day plunged, while the average number of inpatients decreased modestly. In the care services sector, the number of recipients of long-term care benefits for using some home-based care services declined. Such services include day care services and short-term overnight stays at nursing facilities. The figure for recipients of facility services (those who were admitted to nursing facilities) did not fall. What's more, in the retail trade industry, sales at department stores plunged, while those at supermarkets and drug stores increased. As the data suggest, the impact of the COVID-19 pandemic on service user behaviors varies by industry and requires careful attention.

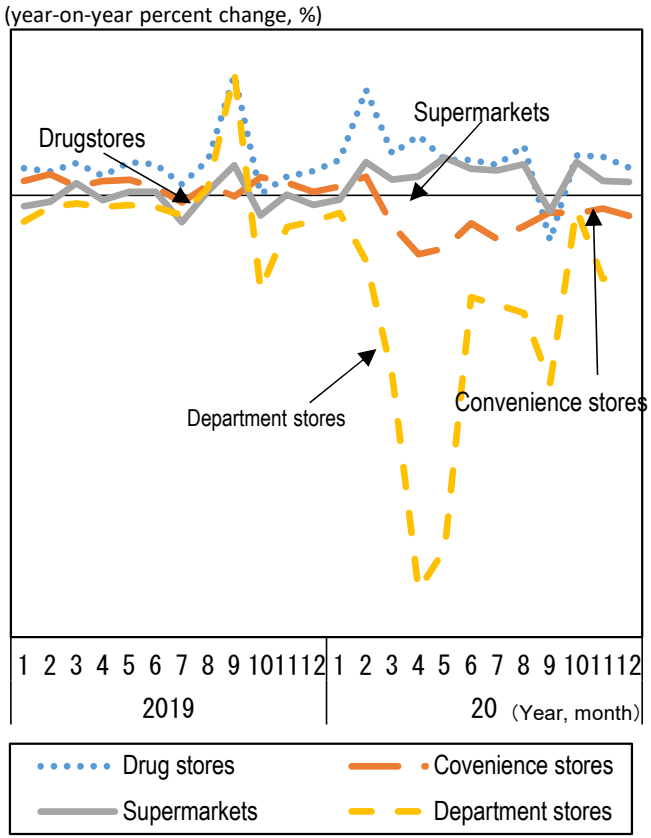
(1) Use of health care services



(2) Number of recipients of long-term care benefits



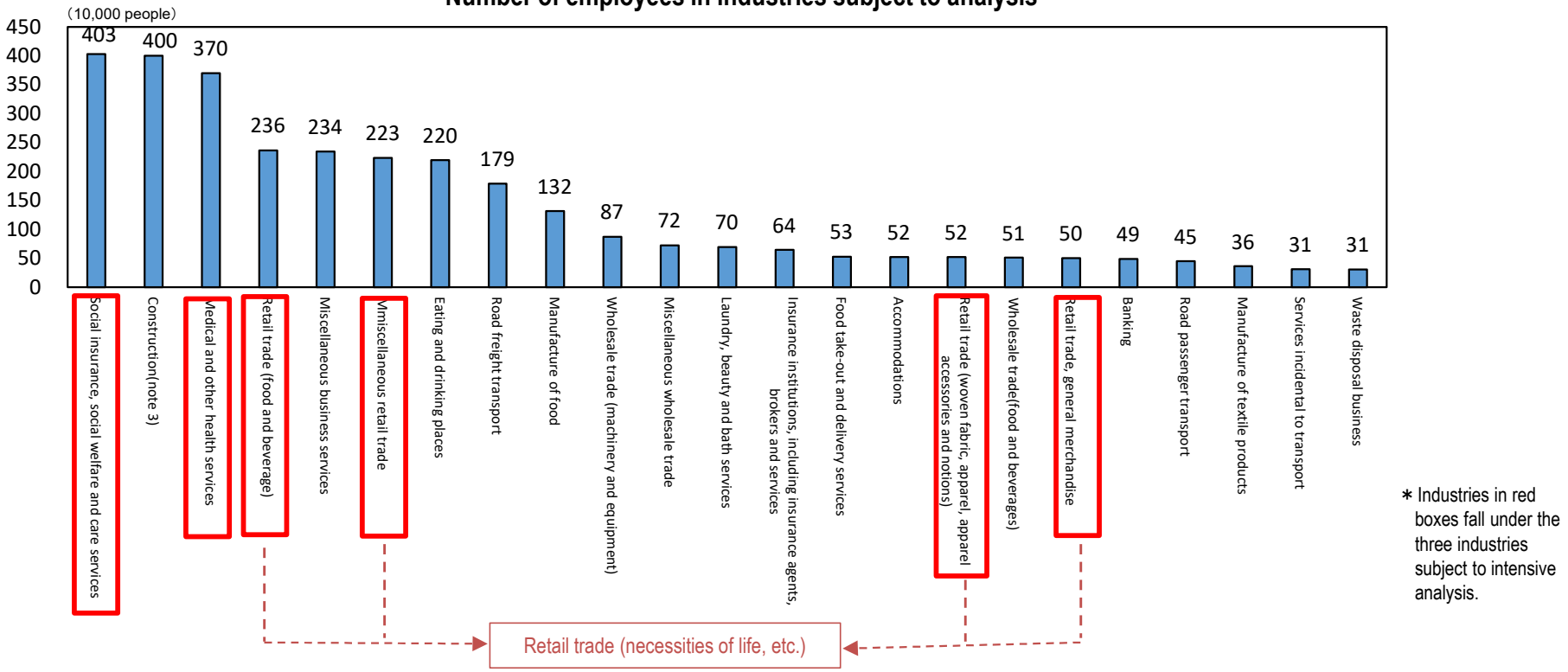
(3) Sales by type of retail stores



Ⅱ —Analysis Focusing on the Medical and Other Health Services, Care Services, and Retail Trade Industries (2) （Analysis Method） —

- This chapter analyzes how work was carried out during the pandemic, focusing on workers employed in the 25 industries (hereafter referred to as industries subject to analysis) with the largest number of employees among the business sectors (middle classification groups of Japan Standard Industrial Classification) listed in the basic guidelines for COVID-19 prevention measures as essential sectors that are required to provide services during a state of emergency. The analysis focuses more on workers in the medical and other health services, social insurance, social welfare and care services, and retail trade (necessities of life, etc.) industries than those in other industries.
- There are about 31.4 million workers in the 25 industries mentioned above. They account for about 53 percent of the total number of employees in the country (some 59.21 million workers).
  ※ The number of employees in the retail trade industry (necessities of life, etc.) is the sum of the number of workers in the “food and beverage,” “retail trade of woven fabrics, apparel, apparel accessories and notions,” and “miscellaneous retail trade” industries shown in the chart below.

Number of employees in industries subject to analysis



∗ Industries in red boxes fall under the three industries subject to intensive analysis.

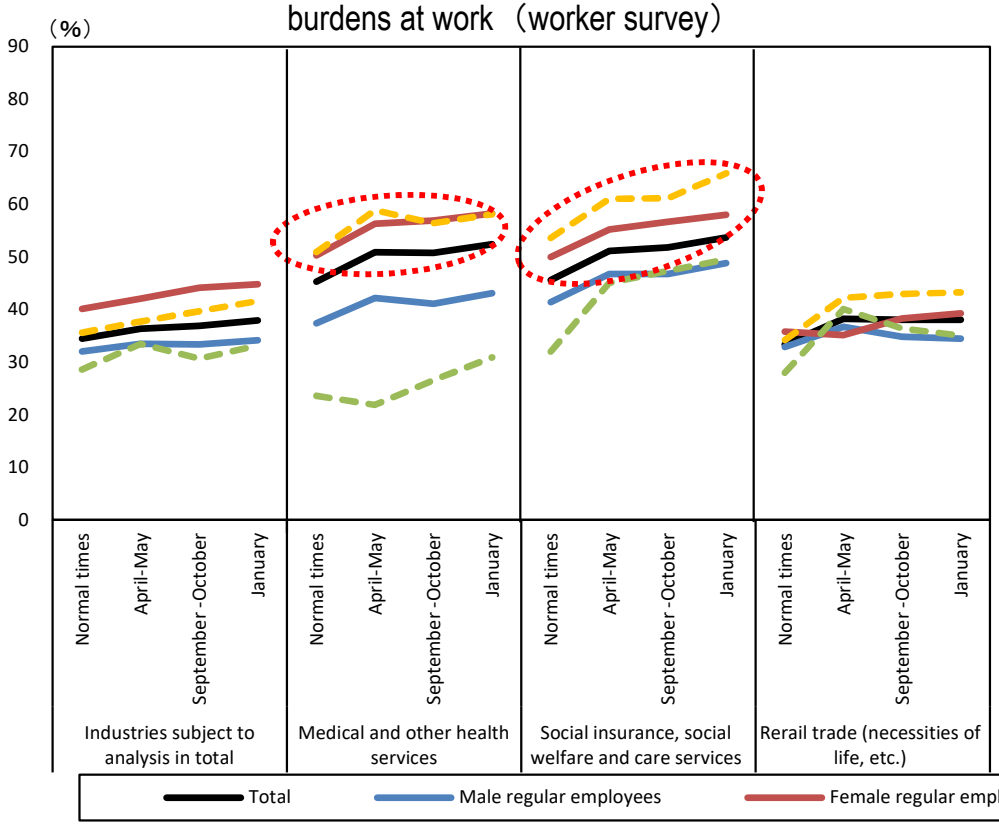
(Notes) 1) The number of employees by industry in the 2017 Basic Survey on Employment Structure shown in the chart is the aggregated data compiled based on the number of employees in the major or middle classification group of Japan Standard Industrial Classification. Thus, the figures in the chart include employees in a wider range of industries than the 25 industries subject to analysis, and it should be noted that those figures given here are rough numbers.

2) ”Construction work, general including public and private construction work”, “equipment installation work” and “construction work by specialist contractor, except equipment installation work” in the middle classification group of the construction industry are subject to analysis. But those industries are displayed as “construction” in the chart because they are grouped into the construction industry (the broad division of Japan Standard Industrial Classification) in the Basic Survey on Employment Structure.

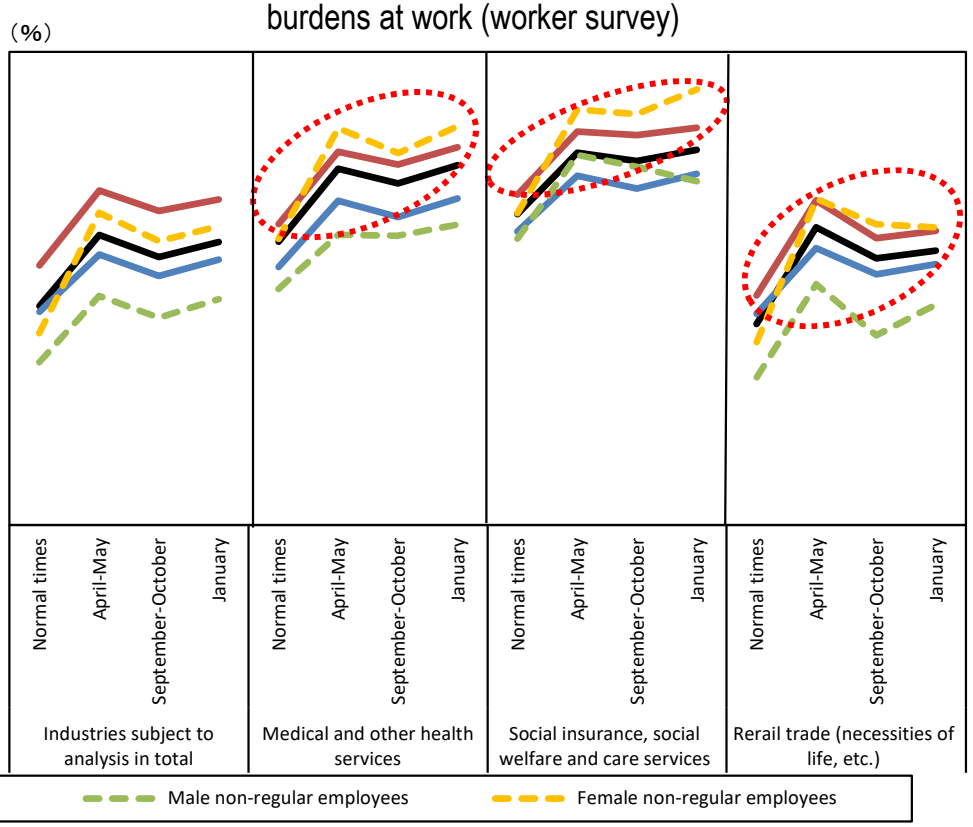
Ⅱ —Analysis Focusing on the Medical and Other Health Services, Care Services, and Retail Trade Industries (3) （Workers' Mental and Physical Burdens） —

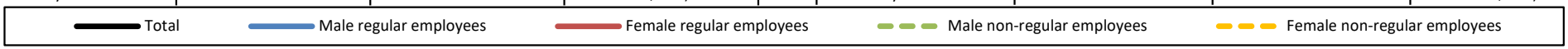
- Workers in the medical and other health services, and social insurance, social welfare and care services industries were more likely than those in other industries to respond even in normal times (before the pandemic) that they experienced heavy mental and physical burdens. The percentage of such workers in the medical and other health services, and social insurance, social welfare and care services industries rose further between April and May 2020. It increased again in January 2021 to the level reached in April and May 2020. Meanwhile, the percentage of workers in the retail trade (necessities of life, etc.) industry who responded their jobs posed a great psychological burden on them also rose between April and May 2020. Among workers in any industry, an increase in mental burden was more significant than an increase in physical burden.
- The percentage of workers (both regular and non-regular employees) who reported heavy physical and mental burdens from work is higher among females than males.

（１） Percentage of workers who reported heavy physical burdens at work （worker survey）



（２） Percentage of workers who reported heavy mental burdens at work (worker survey)



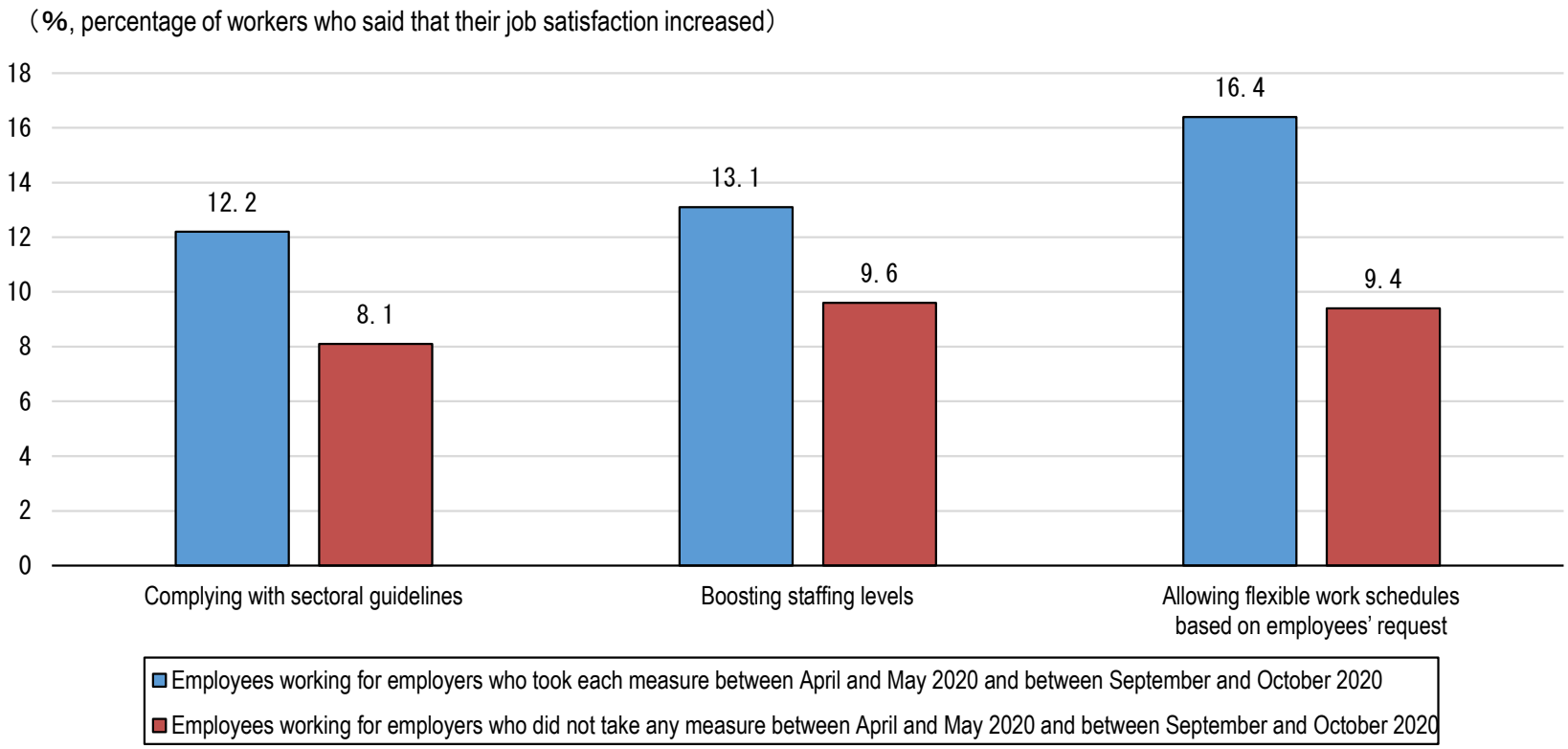


Source:" Survey on Workers' Working Style under the Spread of New Coronavirus Infections (Workers' Survey)2021,"The Japan Institute for Labour Policy and Training
(Notes) 1) Chart 1 shows the number of respondents who said "huge" or "great" in a survey asking workers to assess their physical burden at work during each period.
2) Chart 2 shows the number of respondents who said "huge" or "great" in a survey asking workers to assess their mental burden at work during each period.
3) In charts 1 and 2, normal times refer to the period in and before January 2020, and the "April to May" and "September to October" mean those periods in 2020 while the "January" refers to the month in 2021.

Ⅱ —Analysis Focusing on the Medical and Other Health Services, Care Services and Retail Trade Industries (4) （Relationship between COVID-19 Response Measures in Workplaces and Job Satisfaction） —

Employees working for employers who have continuously taken steps to respond to the COVID-19 outbreak are generally more likely than those working for employers who have not taken any action to say that their job satisfaction level has gone up. The measures taken by employers are as follows: complying with sectoral guidelines, boosting staffing levels, allowing flexible work schedules based on employees' request.

Percentage of workers who said that their job satisfaction between September and October was higher than that between April and May by implementation of measures to respond to the pandemic in workplaces



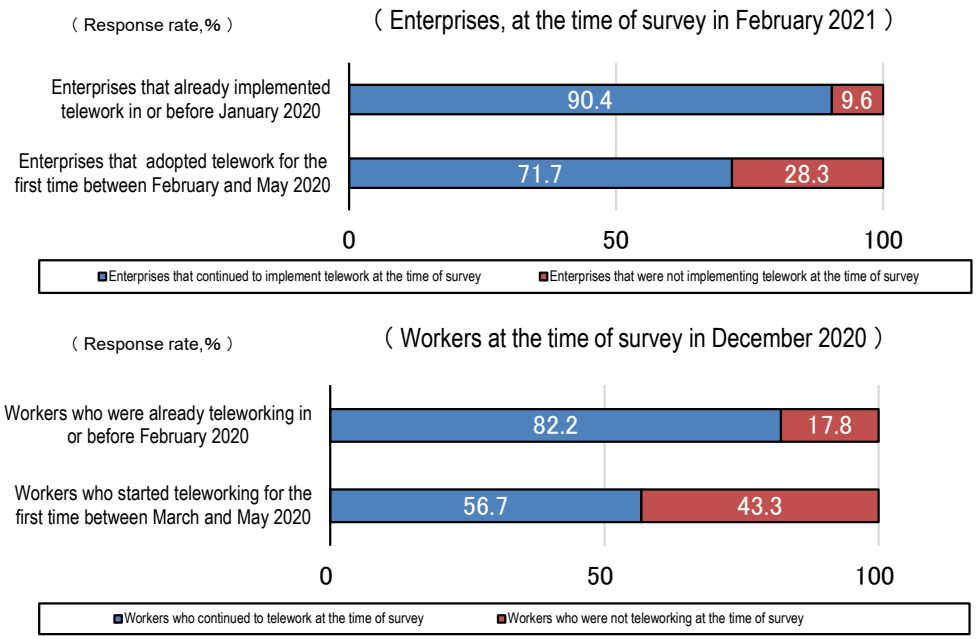
(Notes) 1) A survey has asked workers whether their employer took each measure stated above to respond to the COVID-19 outbreak during the periods between April and May 2020 and September and October 2020, and then split those respondents into two groups according to the answers: those who said measures were taken in both periods and those who said measures were not taken. The chart above shows the percentage of workers in each group whose job satisfaction increased.

2) In this survey on the level of job satisfaction in each period, workers were asked to select an option from the following list of answers: very high, slightly high, neither high nor low, slightly low, very low. If workers' level of job satisfaction improved between the April to May period of 2020 and the September to October period of 2020, it is counted as "increased". For instance, when a worker's satisfaction level changed from "slightly high" to "very high," it is counted as an increase in satisfaction.

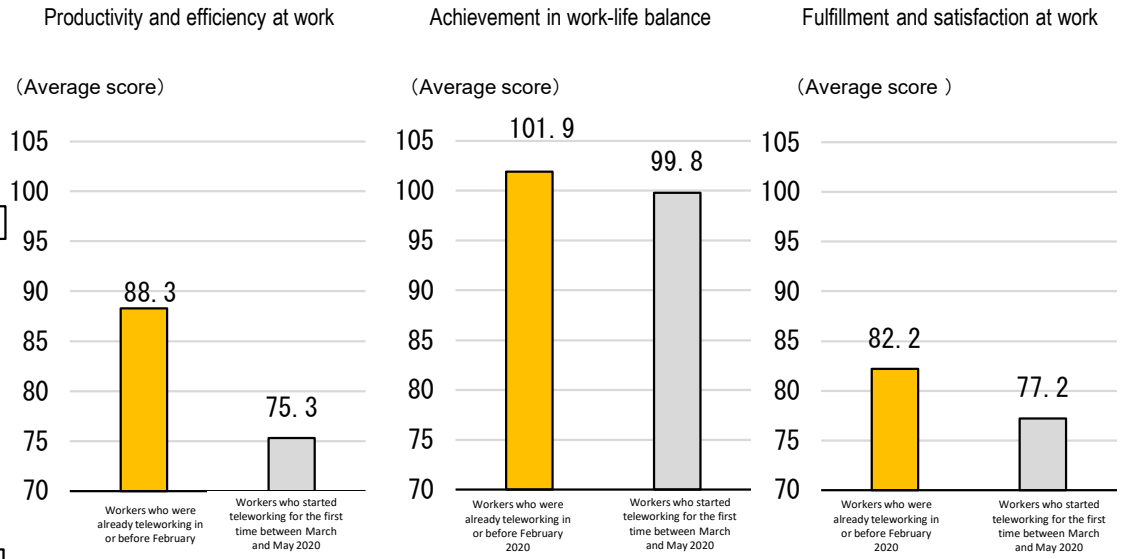
Ⅲ. Analysis of Workers Who Teleworked During the Pandemic（Analysis Based on New Questionnaire Surveys）
- Analysis for Making Telework the New Normal (1)
（Continuity, Work Productivity, Job Satisfaction, etc. by Timing of the Start of Teleworking） -

- Enterprises that already implemented telework prior to the pandemic are more likely than those that introduced telework amid the pandemic to continue to implement telework. The same holds true for employees who were already teleworking before the pandemic. They are more likely than those who started teleworking during the pandemic to continue teleworking.
- Workers who had experience of teleworking before the pandemic reported higher average scores than those who began teleworking for the first time amid the pandemic when asked to rate their “productivity and efficiency” and “fulfillment and satisfaction” of teleworking on a scale of 0-200 if “productivity and efficiency” and “fulfillment and satisfaction” of working in the office is 100. Though the respondents in both groups reported average scores lower than 100, declines in scores were smaller among workers who were already teleworking prior to the pandemic.
  ※ It should be noted that scores for “productivity and efficiency” and “fulfillment and satisfaction” may be high among employees working at companies that implemented telework prior to the pandemic because it was easier for those firms to adopt telework due to the nature of work and other factors.

（１） Continuation of telework by timing of the start of teleworking



（２） Scores for productivity and satisfaction at work, etc. by timing of the start of teleworking



(Note) The figures in chart 2 show the average scores reported by workers who were asked to rate their “productivity and efficiency,” “work-life balance” and “fulfillment and satisfaction” of teleworking subjectively on a scale of 0-200 if their “productivity and efficiency,” “work-life balance” and “fulfillment and satisfaction” of working in the office are 100.

● Reports about the analysis of productivity of teleworking other than this paper

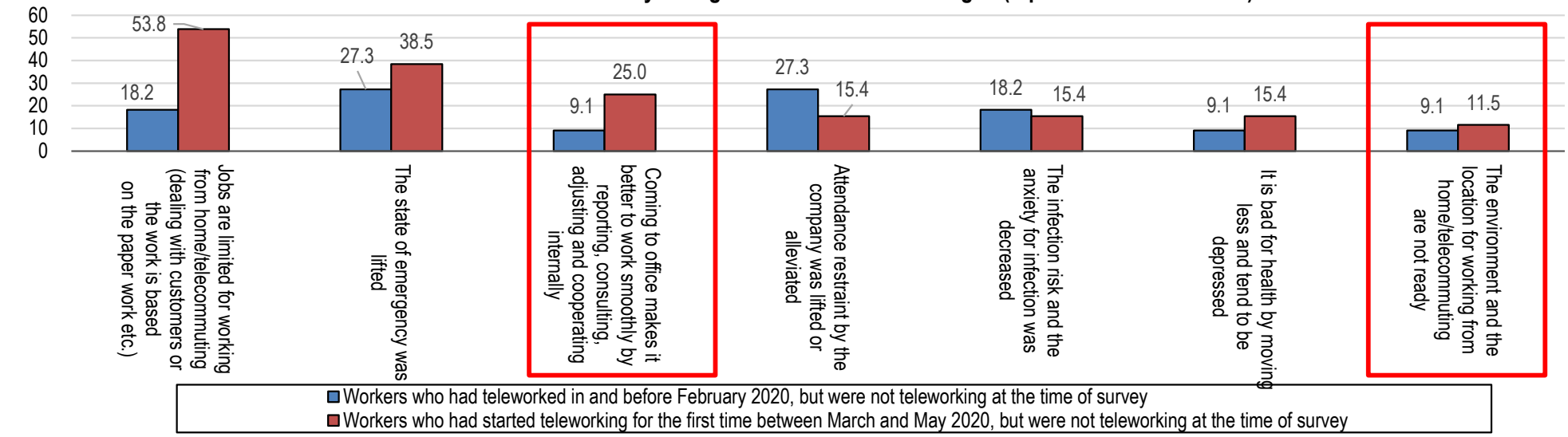
- “Productivity of Working from Home during the COVID-19 Pandemic: Evidence from an Employee Survey”, Masayuki Morikawa, REITI Discussion Paper Series 20-J-034 states that the average score for subjective productivity of teleworking was 60.6 in a study conducted in June 2020 asking employees to evaluate their subjective productivity of teleworking if their productivity of working at the workplace was 100. The report also states that the average score among employees who were already teleworking before the pandemic was 76.8, while the average among those who began teleworking during the pandemic was 58.1.
- According to the report written by Toshihiro Okubo of the Nippon Institute for Research Advancement, or NIRA (2020), on the results of the second survey on telework and employed persons, the average score for workers’ efficiency of teleworking at the time of survey conducted in June 2020 was 83 if their efficiency of working in the office was 100.

Ⅲ —Analysis for Making Telework the New Normal (2)（Reasons Not to Telework）—

- Besides factors that are beyond control of workers and enterprises such as the nature of work and the impact of infection, many workers cite matters (in red boxes in the chart below) that can be resolved through labour-management efforts as reasons why they have stopped teleworking. Such matters include how to proceed with the work while teleworking and setting up a suitable teleworking environment. Workers who began teleworking in April and May 2020, when the country was under a state of emergency, in particular, tend to cite such issues as reasons for ending telework. Enterprises also see similar matters as challenges for them, and the proportion of such companies is high.

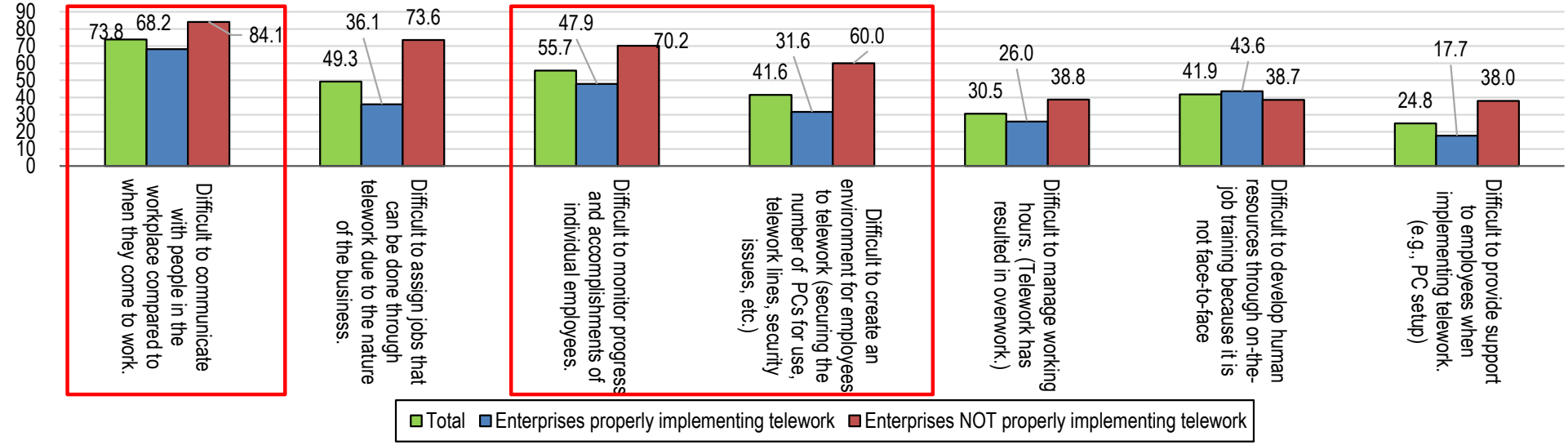
（Response rate, %, multiple answers allowed）

（１）Reasons not to telework by timing of the start of teleworking　(top 7 most cited reasons)



（２）Challenges enterprises face and the state of operation and implementation of telework （top 7 most cited challenges）

（Response rate, %, multiple answers allowed）



Ⅲ - Analysis for Making Telework the New Normal (3) (Effects of Work procedure and Telework Environment on Job Satisfaction) -

- Workers who were teleworking before the pandemic are more likely than those who began teleworking for the first time during the pandemic to agree with the following statements about how to proceed with the work while teleworking: the scope of work responsibility and deadlines are clearly defined, workers are given a certain degree of discretion to work autonomously, and evaluation standards are clearly defined. Workers who agree with the said statements reported slightly higher average scores than those who disagree when asked to rate their “fulfillment and satisfaction” of teleworking on a scale of 0-200.
- Workers who were teleworking before the pandemic are more likely than those who began teleworking for the first time during the pandemic to answer yes when asked whether they are well equipped and prepared for teleworking. Workers who answered yes to the said question reported a higher average score than those who answered no when asked to rate their “fulfillment and satisfaction” of teleworking on a scale of 0-200.

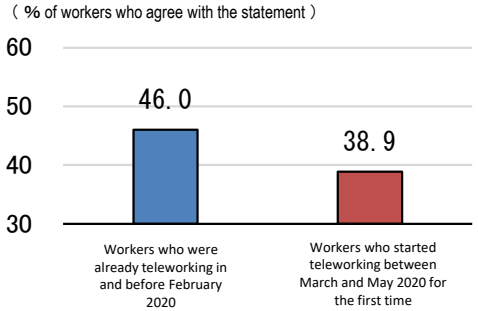
（１） Percentage of workers agreeing with each statement by timing of the start of teleworking

Work procedure while teleworking

Telework environment

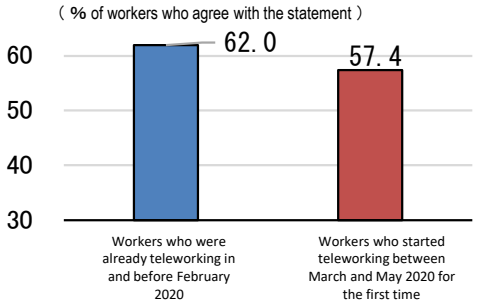
Clarity on the scope of work responsibility and deadlines

To proceed the daily work, I am told by the superior, etc. about my work scope or deadline precisely.



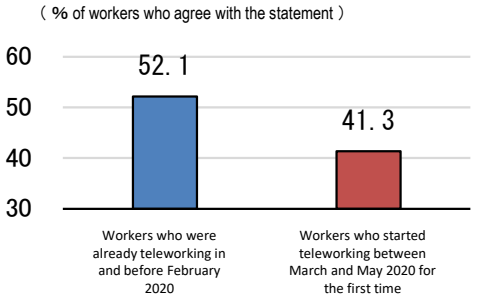
Discretion to work autonomously

Given some degree of discretion for work instead of receiving the direction from the superior one by one



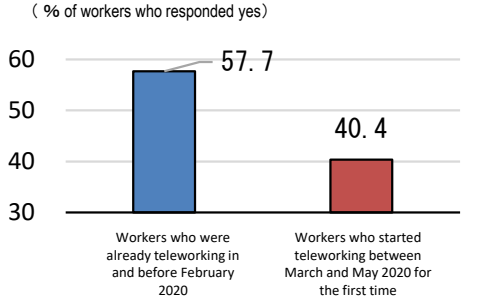
Clarity on evaluation standards

The standard of evaluation for the work (result) such as the level of the target to reach is set clearly



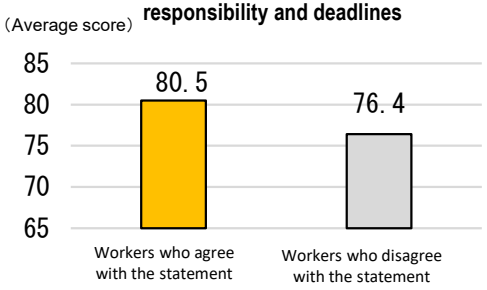
Setting up a proper telework environment

The facility for teleworking (internet environment and the performance of the computer for teleworking) is well-equipped.



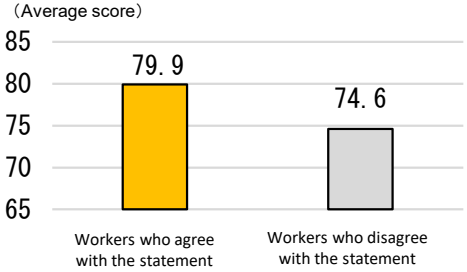
（２） Scores for fulfillment and satisfaction at work by response to questions

Clarity on the scope of work responsibility and deadlines

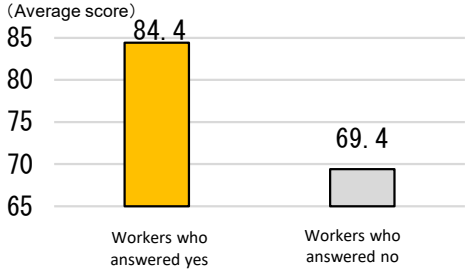


Discretion to work autonomously

Clarity on evaluation standards



Setting up a proper telework environment



（Note） Figures in chart (2) show the average scores reported by workers who were asked to rate their subjective “fulfillment and satisfaction” of teleworking on a scale of 0-200 if their “fulfillment and satisfaction” of working in the office are 100.