

Provisional translation by the FPCJ

# Changes to Working Styles in the COVID-19 Pandemic

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# Outline

1. Current Working Style for Women
2. Current Working Style for Middle-Aged and Senior Men
3. New Working Style in the COVID-19 Pandemic
4. Future Trends and Issues for Working Style



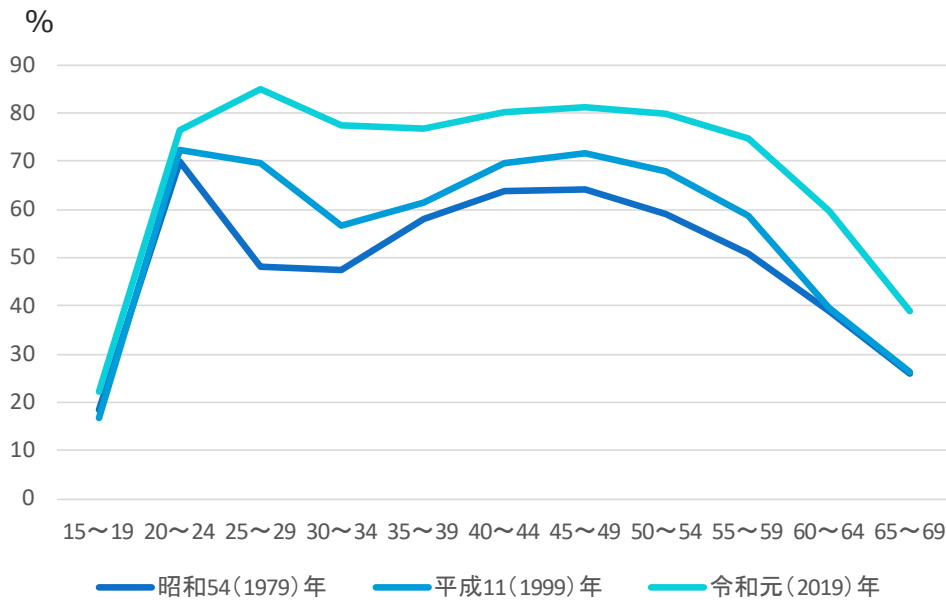
## 1. Current State of Women in the Workforce

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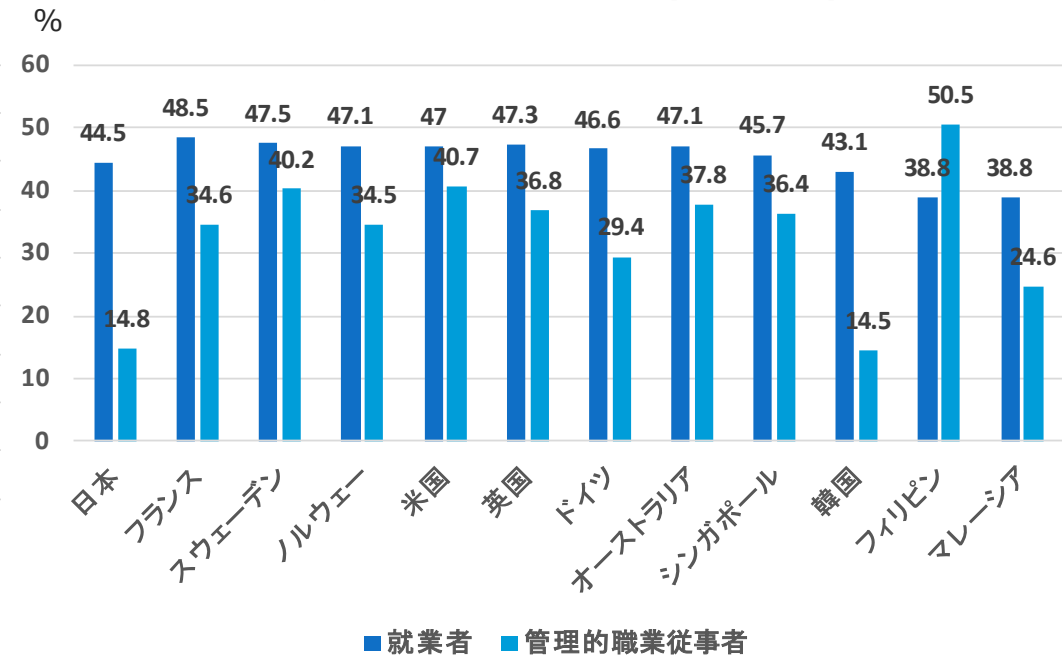
## Current State of Labor Participation by Women ①

- Although the M curve is being gradually eliminated, the percentage of women in management positions remains extremely low.

### Labor Participation Rate by Age Category



### Women's Employment Rate and Percentage in Management Positions by Country

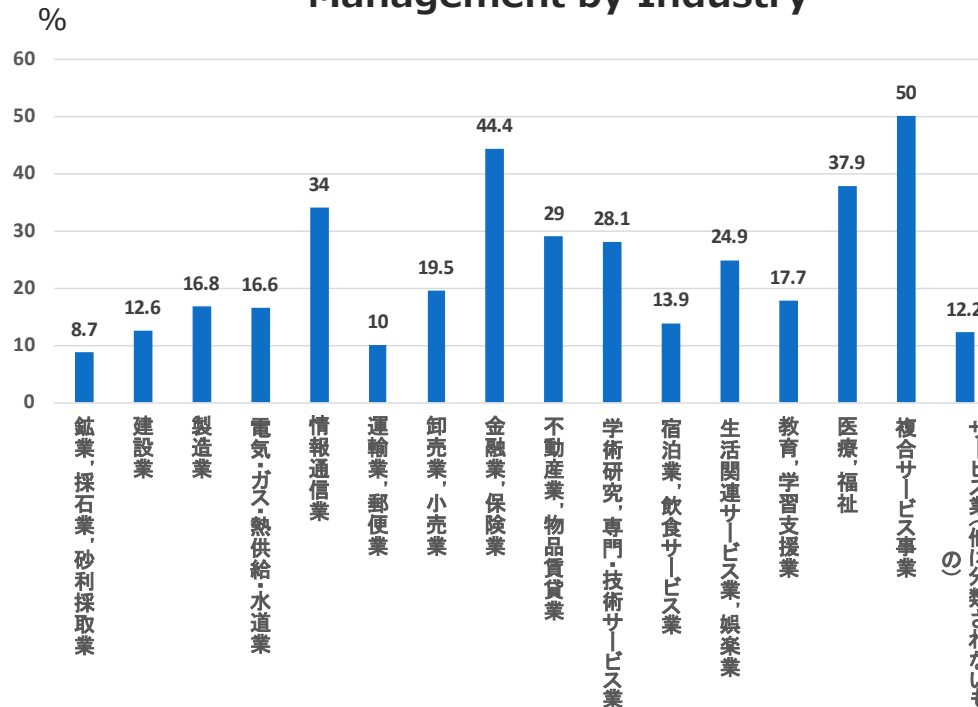


出所：「令和2年版男女共同参画白書」（内閣府）

## Current State of Labor Participation by Women ②

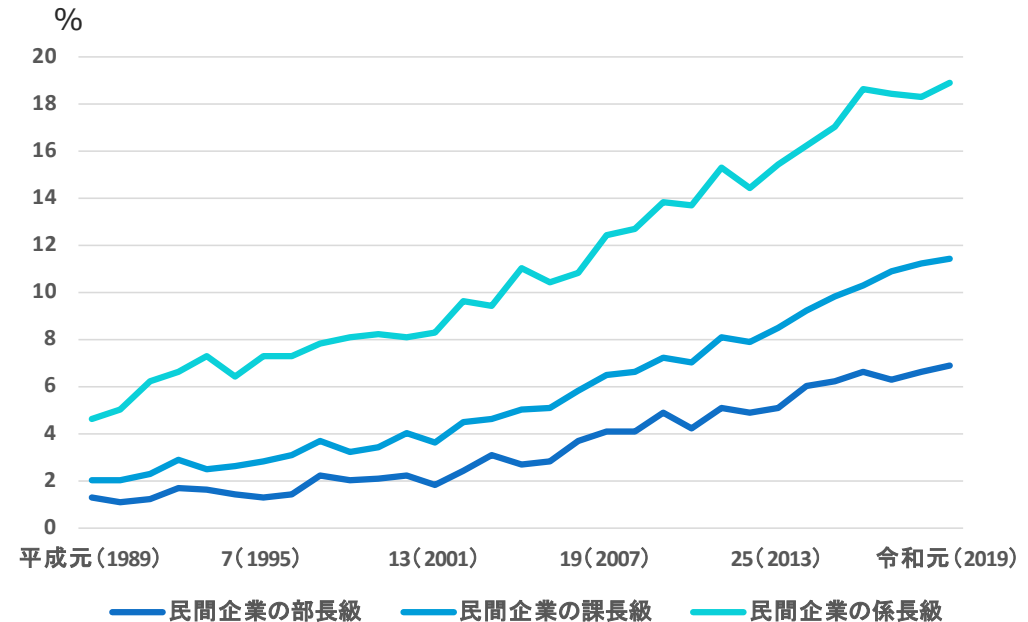
- Although there is a significant difference in the percentage of women in management positions depending on the industry, overall there has been a gradual increase in the number of women in management.

Percentage of Women in Management by Industry



出所：「令和元年度雇用均等基本調査」（厚生労働省）

Percentage of Women by Level of Management

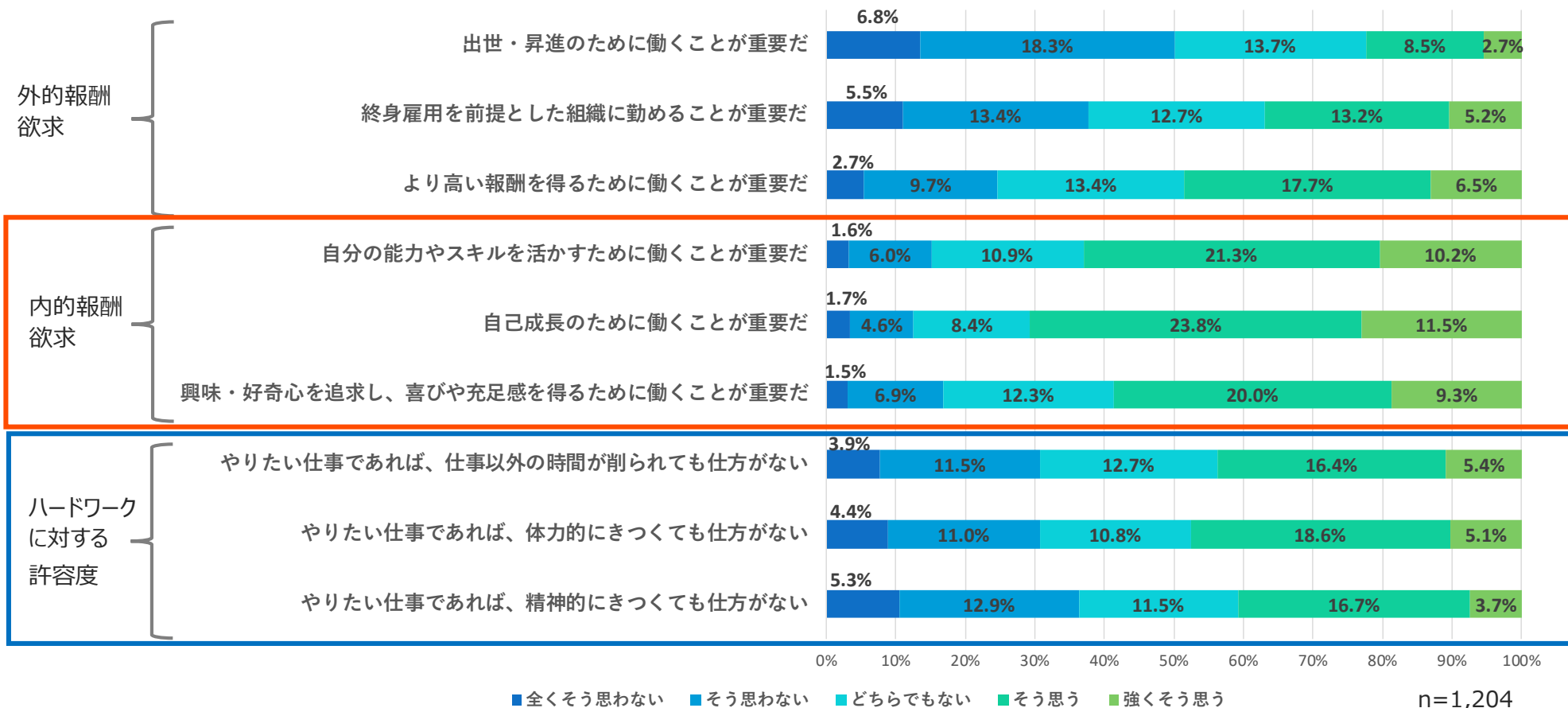


出所：「令和2年版男女共同参画白書」（内閣府）

# Changes to Women's Career Awareness ①

- Strong interest in personal growth and applying their skills, with a tendency to prioritize work over personal life for work they want to do.

## Women's Work Values (When Job Seeking)

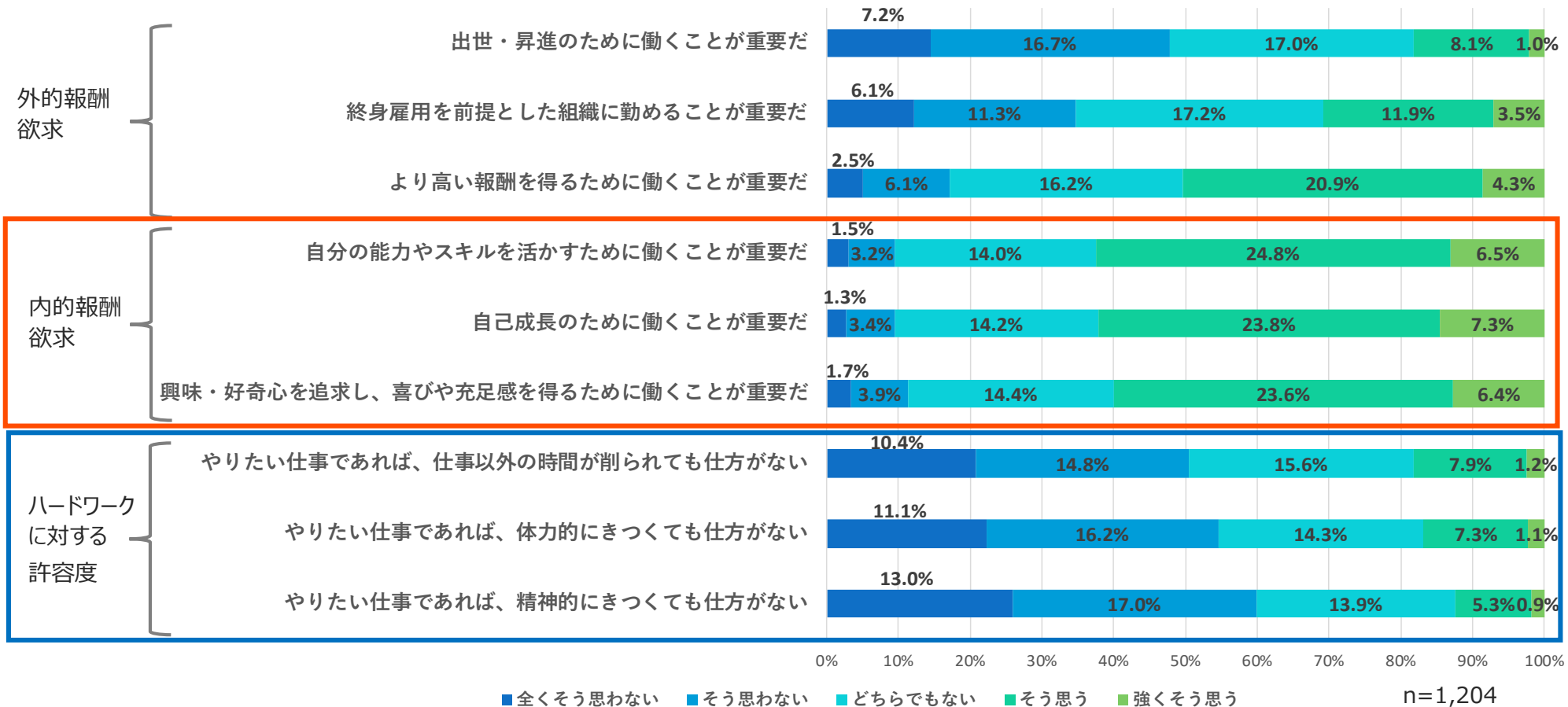


出所：「東京圏で働く高学歴中女性の働き方等に関するアンケート調査結果」  
 (株式会社日本総合研究所)

## Changes to Women's Career Awareness ②

- Still strong interest in personal growth and applying skills, but a tendency to prioritize time for personal life over work.

### Women's Work Values (When Responding to the Survey)

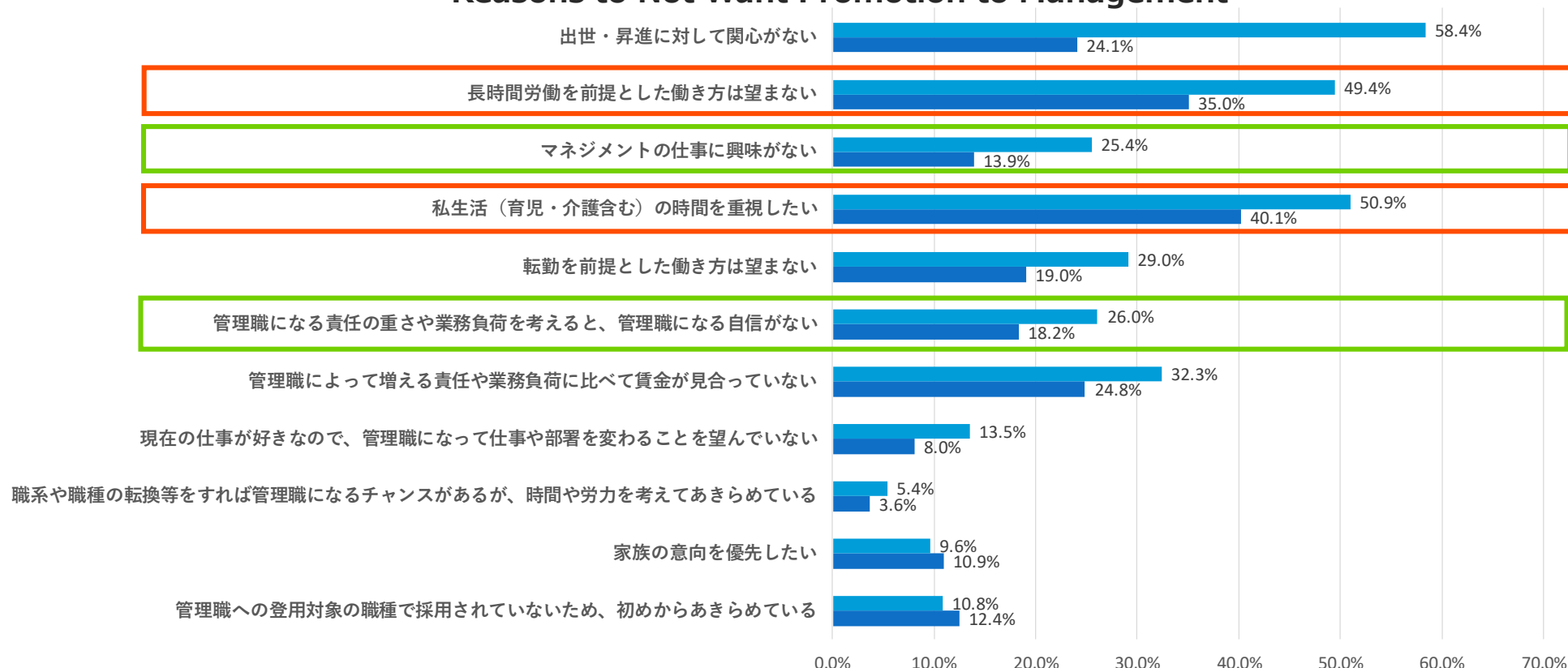


出所：「東京圏で働く高学歴中女性の働き方等に関するアンケート調査結果」  
 (株式会社日本総合研究所)

# Reasons Women Do Not Want Management Positions

- Women do not want management positions not because they are uninterested in management, but more so because of the problem of long working hours.

## Reasons to Not Want Promotion to Management



■ 管理職への登用希望に対して「いいえ」と回答した女性

「いいえ」と回答した女性 = 370人

「どちらともいえない」と回答した女性 = 152人

■ 管理職への登用希望に対して「どちらともいえない」と回答した女性

出所：「東京圏で働く高学歴中女性の働き方等に関するアンケート調査結果」

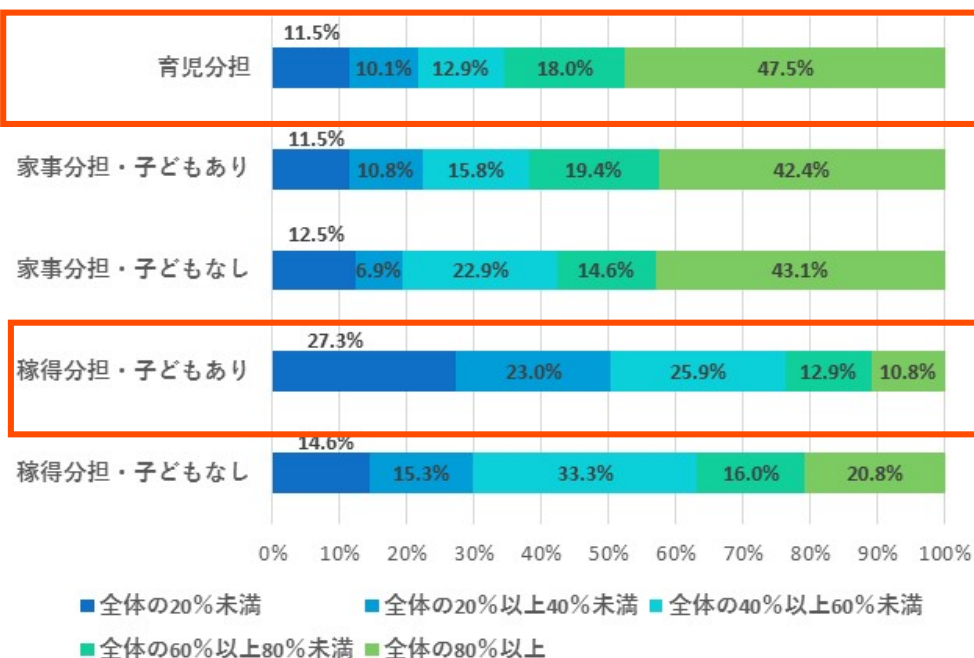
（第二回目）（株式会社日本総合研究所）



# Ideal and Reality of Division of Labor in Dual Income Families

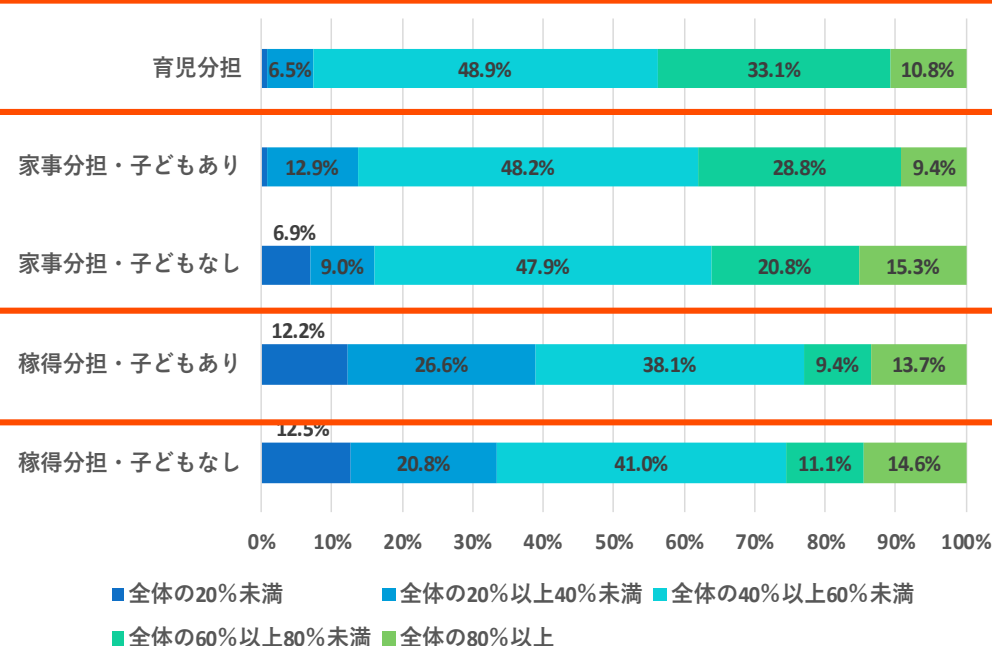
- If husbands shared more of the burden of raising children and household chores, it is possible women would work more.

Share of Raising Children/Chores/  
Income (Reality)



就業女性（子どもあり） = 139人  
 就業女性（子どもなし） = 144人

Share of Raising Children/Chores/  
Income (Ideal)

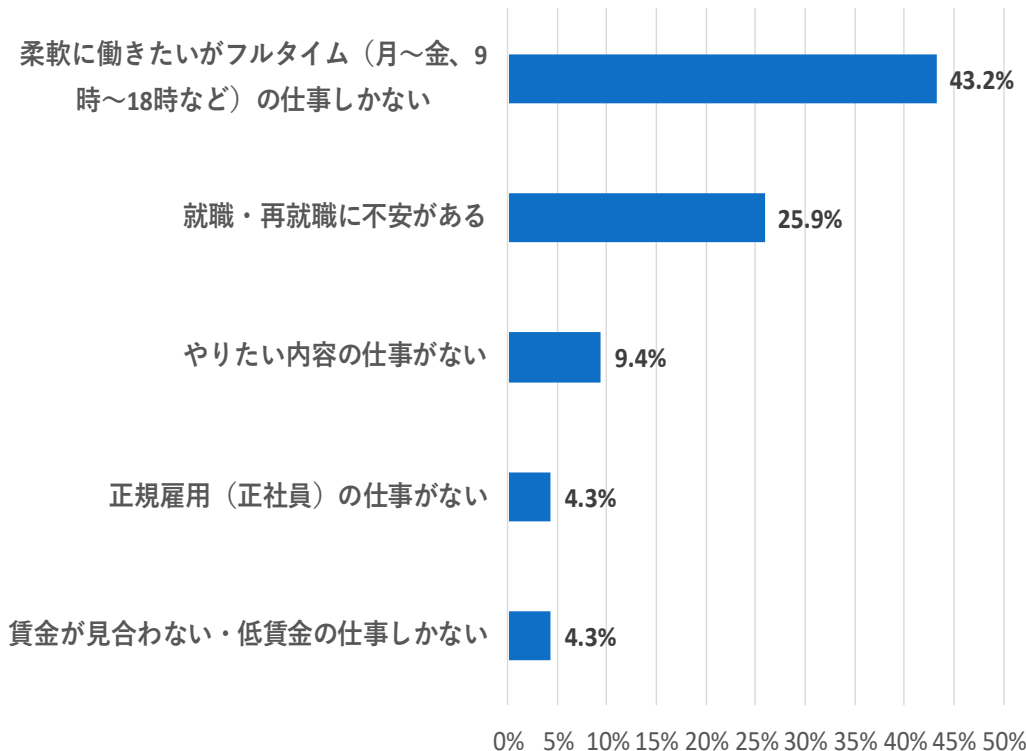


出所：「東京圏で働く高学歴中女性の働き方等に関するアンケート調査結果」  
 （第二回目）（株式会社日本総合研究所）

## Difficulty of Women Rejoining Workforce After Quitting to Raise Children, Etc.

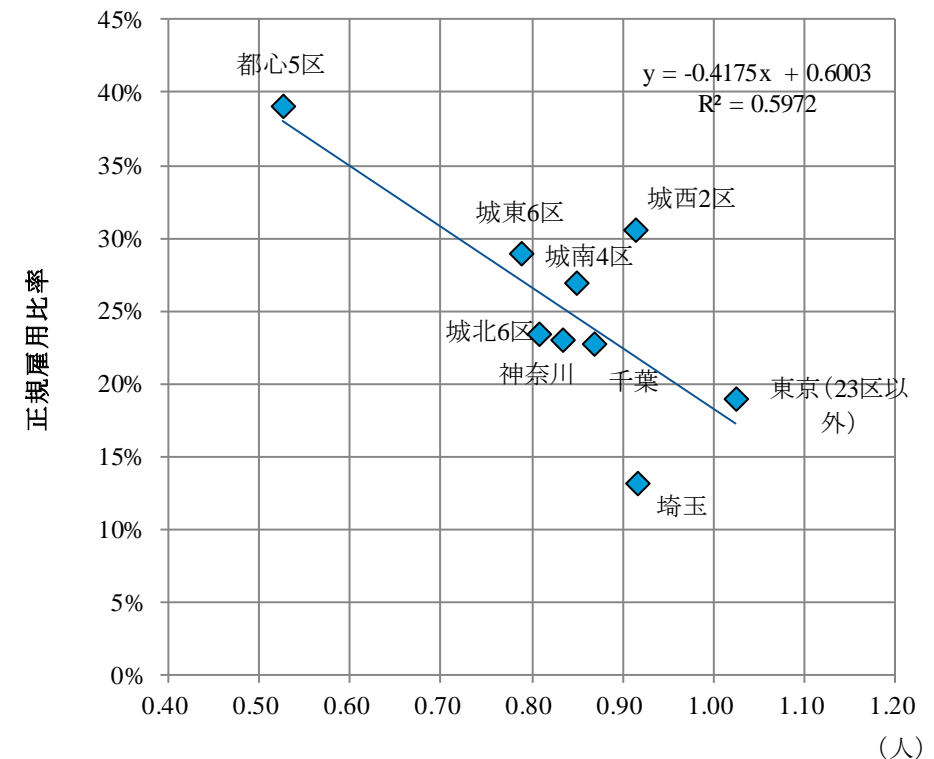
- In addition to few companies allowing flexible working styles, there is a tendency for women raising children to move away from the city center, making finding new work difficult.

### Reasons for Being Unable to Reenter the Workforce



出所：「東京圏で働く高学歴中女性の働き方等に関するアンケート調査結果」  
 （第二回目）（株式会社日本総合研究所）

### Correlation Between Regular Employment Ratio, Number of Children, and Place of Residence

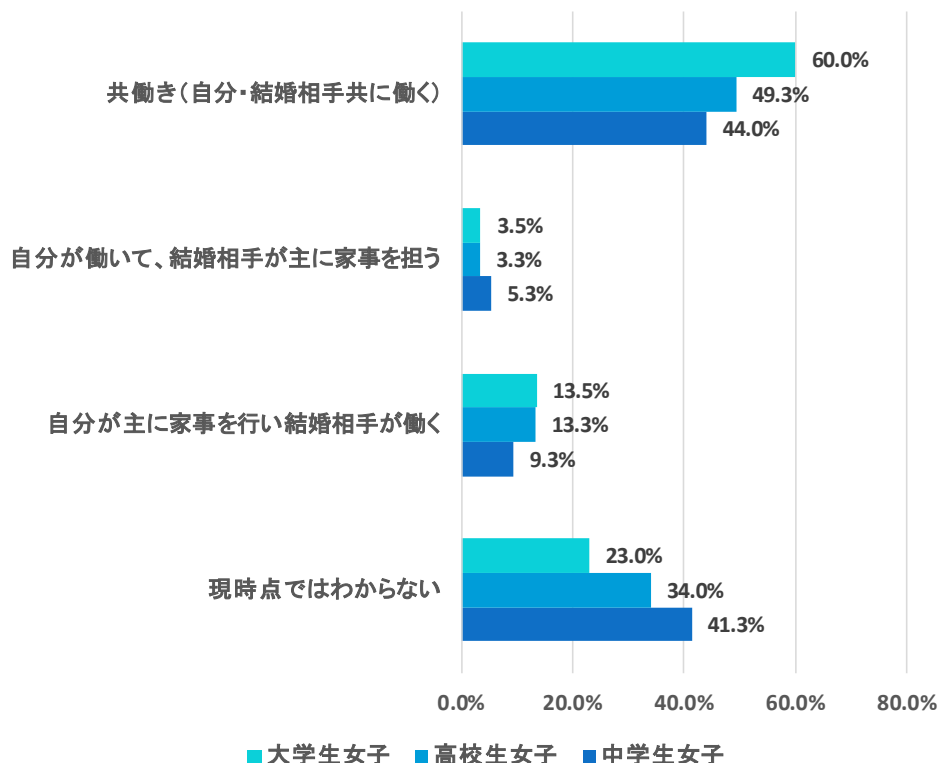


出所：「東京圏で働く高学歴中女性の働き方等に関するアンケート調査結果」  
 （株式会社日本総合研究所）

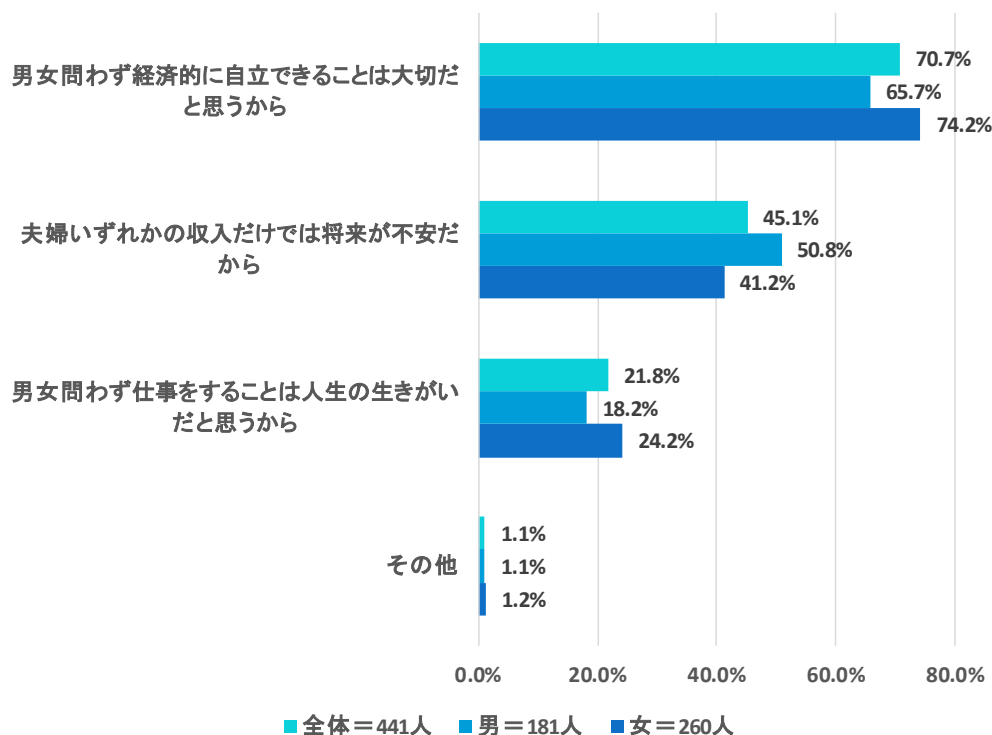
# Career Awareness of the Next Generation of Women

- Many of the next generation of women are interested in working after marriage, in order to have economic independence.

## Desired Future Working Style



## Reasons to Want Two-Income Household



出所：「若者の意識調査（報告）— ESG およびSDGs、キャリア等に対する意識 —」  
 （株式会社日本総合研究所）



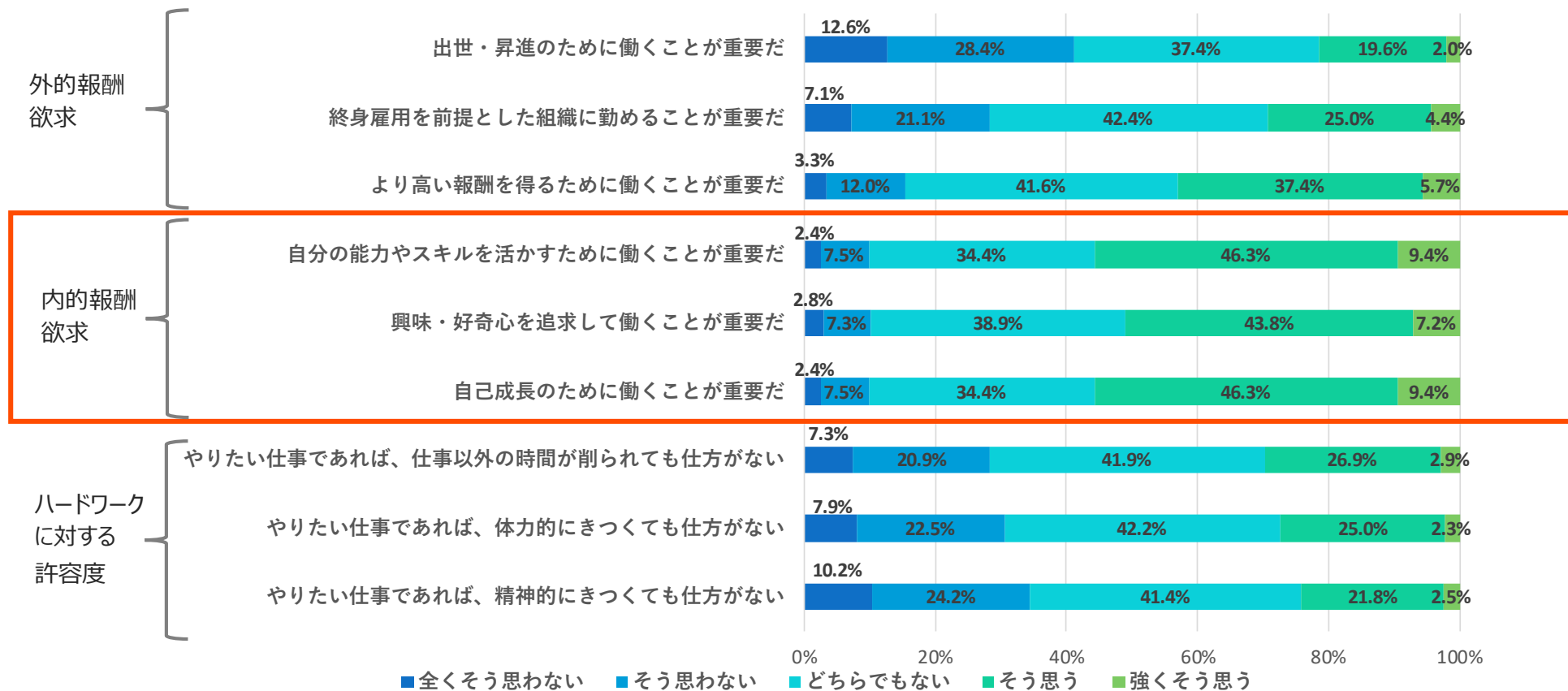
## 2. Working Style of Middle-Aged and Senior Men

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## Career Awareness of Middle-Aged and Senior Men

- Desire for promotion and advancement is low, but many middle-aged and senior men seek in their work opportunities for personal growth and to use their skills.

### Work Values of Middle-Aged and Senior Men



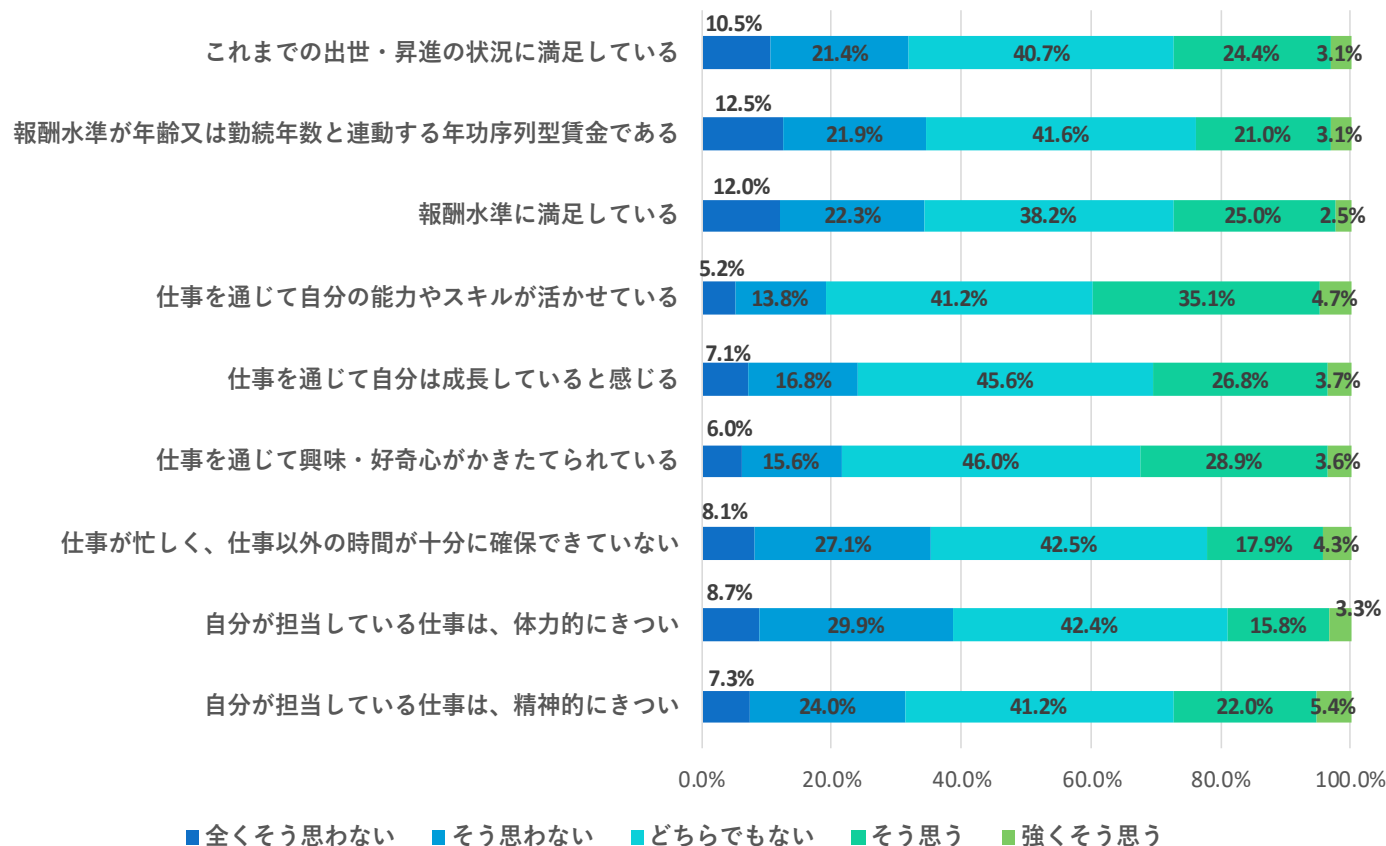
n=1,794

出所：「東京圏で働く高学歴中高年男性の働き方等に関するアンケート調査結果」  
 (株式会社日本総合研究所)

# Job Satisfaction of Middle-Aged and Senior Men

- Although a certain percentage of middle-aged and senior men feel their skills and abilities are being utilized, overall job satisfaction is not particularly high.

## Satisfaction with Work Environment



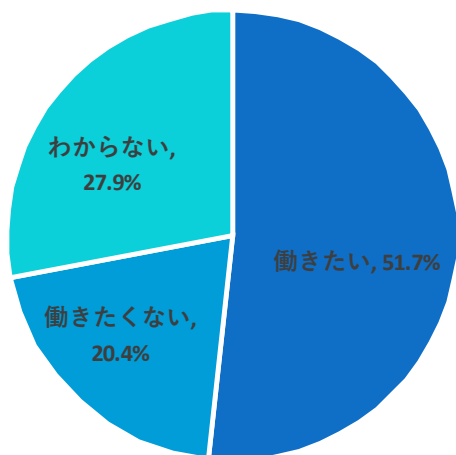
n=1,794

出所：「東京圏で働く高学歴中高年男性の働き方等に関するアンケート調査結果」  
 (株式会社日本総合研究所)

# Interest of Middle-Aged and Senior Men in Reentering the Workforce

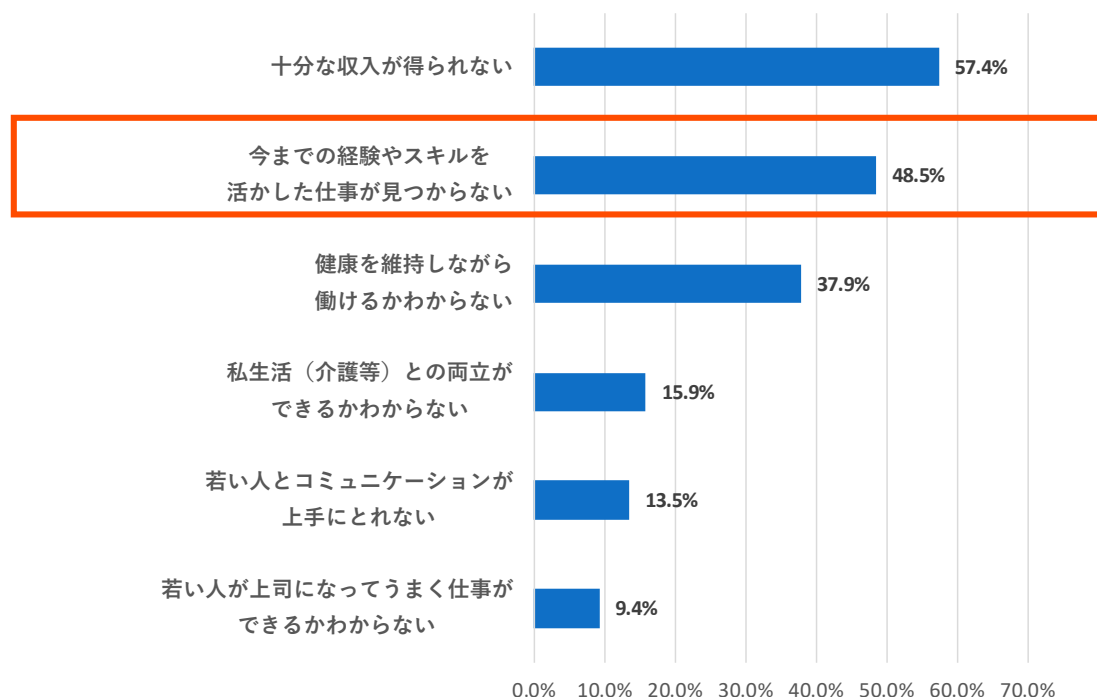
- Although there is high interest in continuing to work after retirement, there are psychological hurdles to finding a new job.

## Desire to Continue Working After Retirement



n=1,794

## Concerns About Finding Work After Retirement

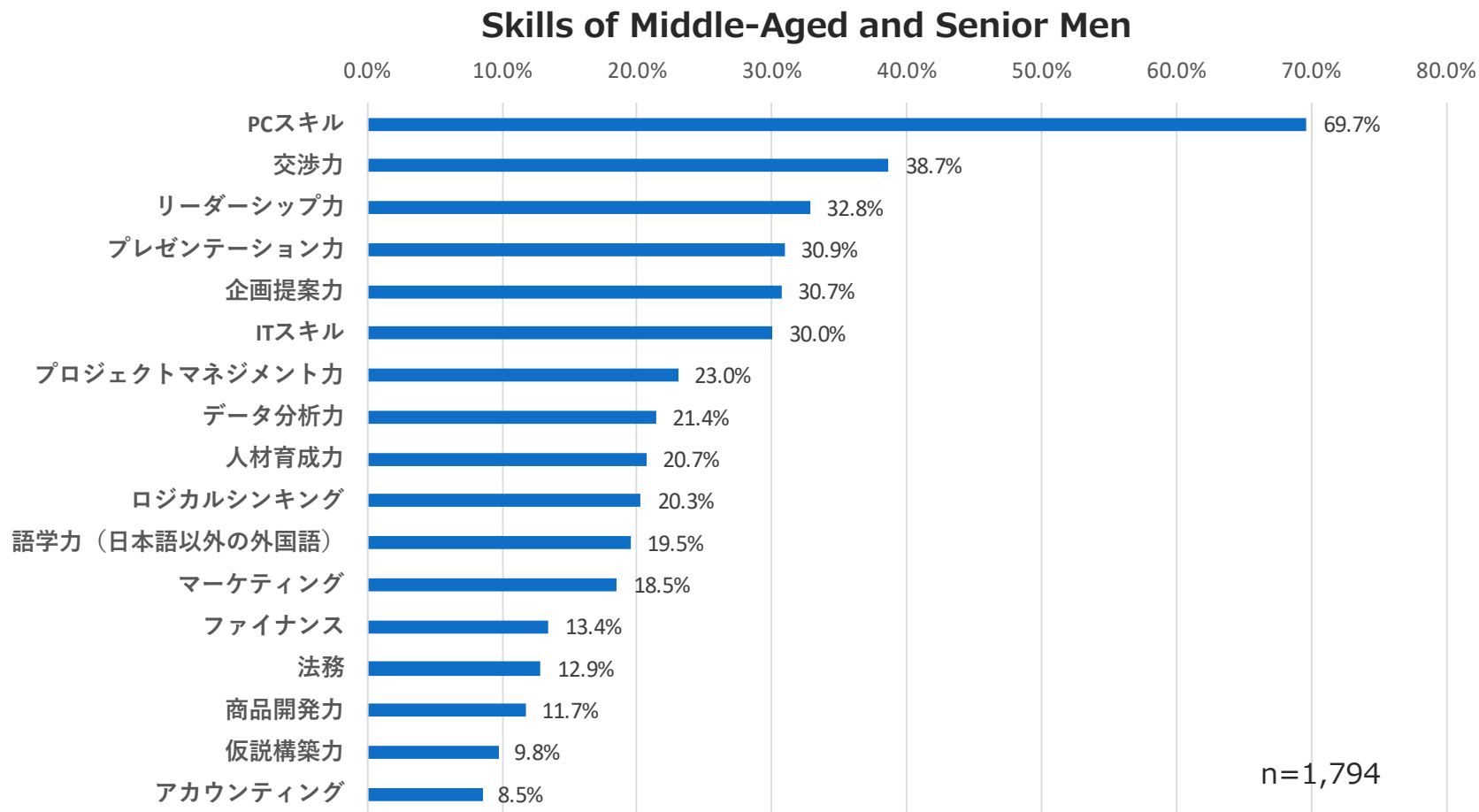


n=927

出所：「東京圏で働く高学歴中高年男性の働き方等に関するアンケート調査結果」  
 株式会社日本総合研究所

## Skills of Middle-Aged and Senior Men

- The most common skills among middle-aged and senior men is computer skills, followed by negotiation and leadership skills.



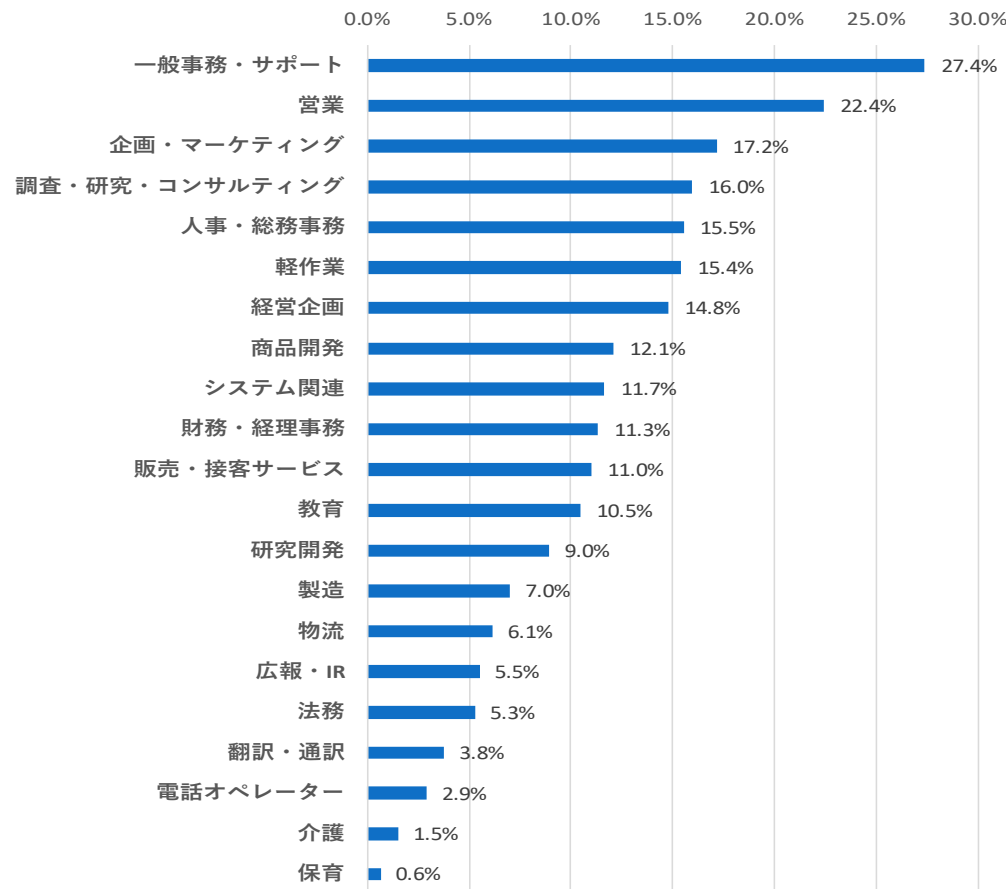
出所：「東京圏で働く高学歴中高年男性の働き方等に関するアンケート調査結果」  
 株式会社日本総合研究所



# Jobs Middle-Aged and Senior Men Want When Reentering the Workforce

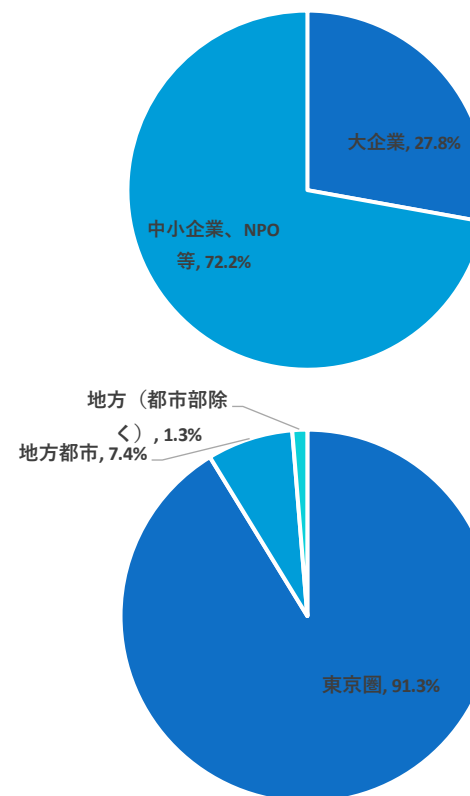
- The jobs men are most interested in after retirement are general office work/support, followed by sales and planning/marketing.

## Jobs Willing to Work After Retirement



n=1,794

## Desired Company Size and Area for Jobs After Retirement

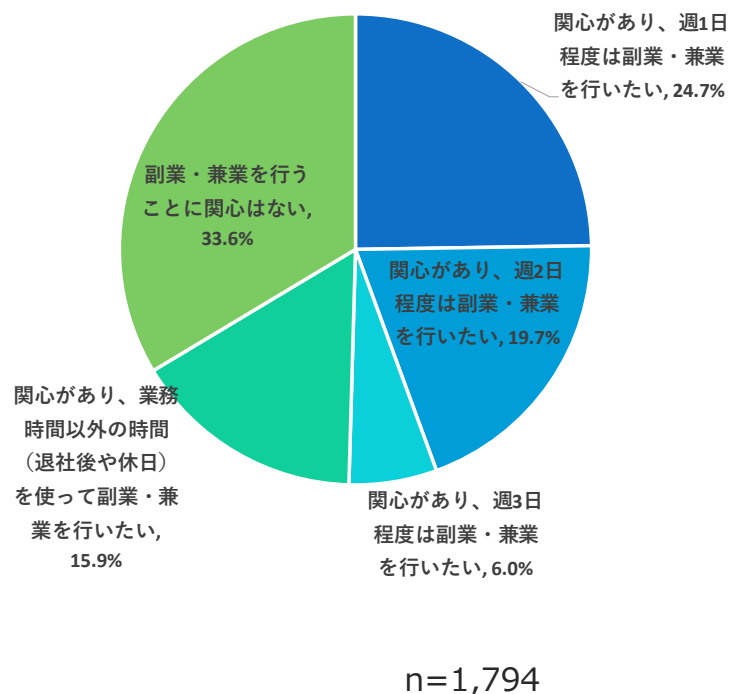


出所：「東京圏で働く高学歴中高年男性の働き方等に関するアンケート調査結果」  
 株式会社日本総合研究所

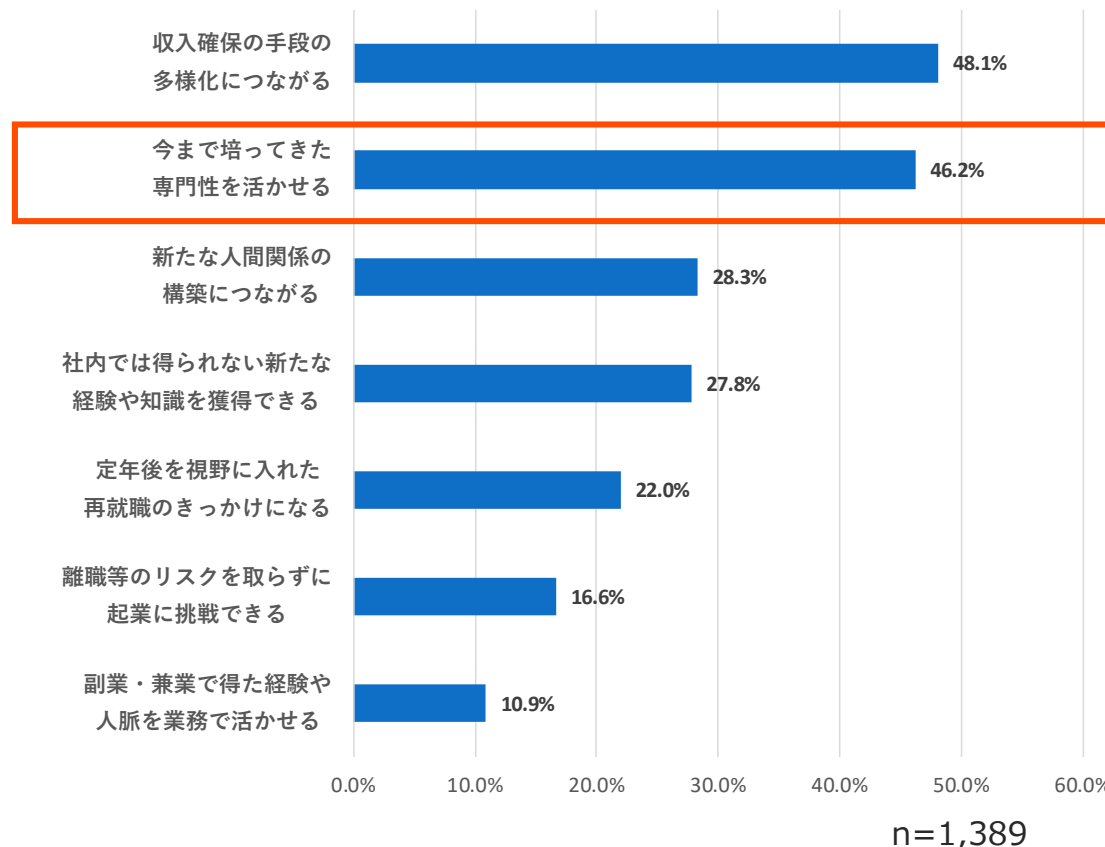
# Middle-Aged and Senior Men's Interest in Side Jobs

- Approximately half of middle-aged and senior men would like to spend time on a side job, even if their income decreases.

## Desired Days to Spend on Side Job (Assuming Pay Declines)



## Reasons to Want a Side Job

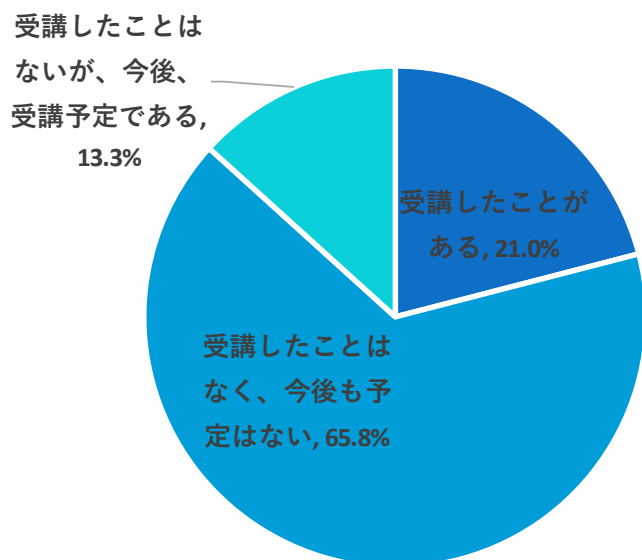


出所：「東京圏で働く高学歴中高年男性の働き方等に関するアンケート調査結果」  
 株式会社日本総合研究所

# Opportunities for Career Training Before Retirement

- Although the number of middle-aged and senior men with opportunities for career training before retirement was low, those who did career training felt they were opportunities to think about the importance of their career and the necessity of work-life balance.

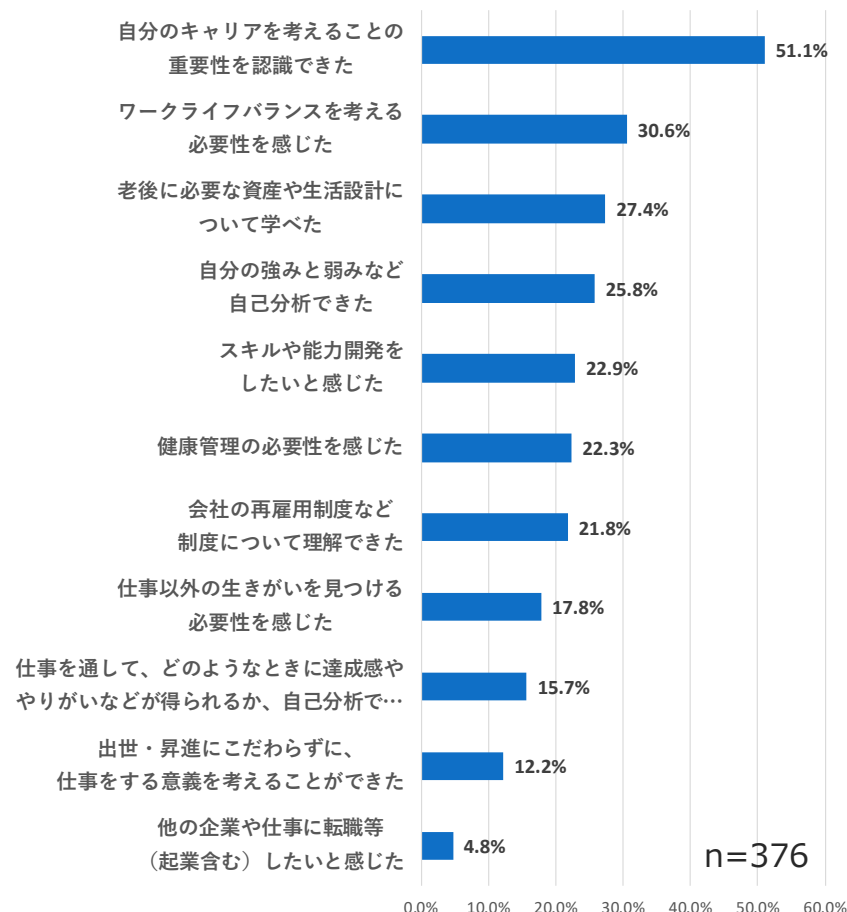
## Opportunities for Career Training



n=1,794

出所：「東京圏で働く高学歴中高年男性の働き方等に関するアンケート調査結果」  
 株式会社日本総合研究所

## Results of Career Training





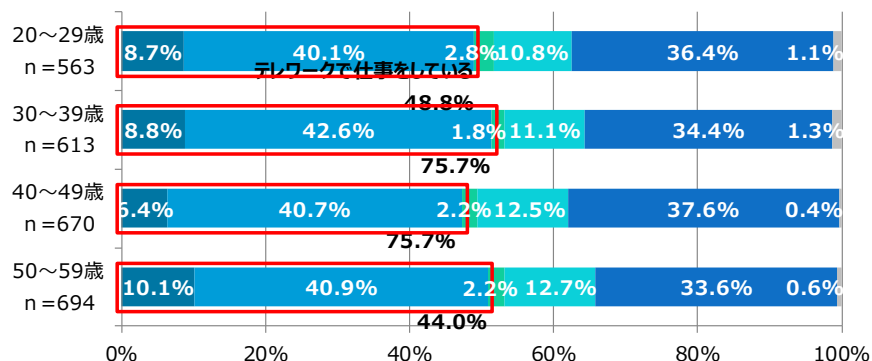
### 3. New Working Style in the COVID-19 Pandemic

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# Changing Working Styles Due to the Pandemic

- In response to COVID-19, more people have been working from home.

Percentage of People Working from Home

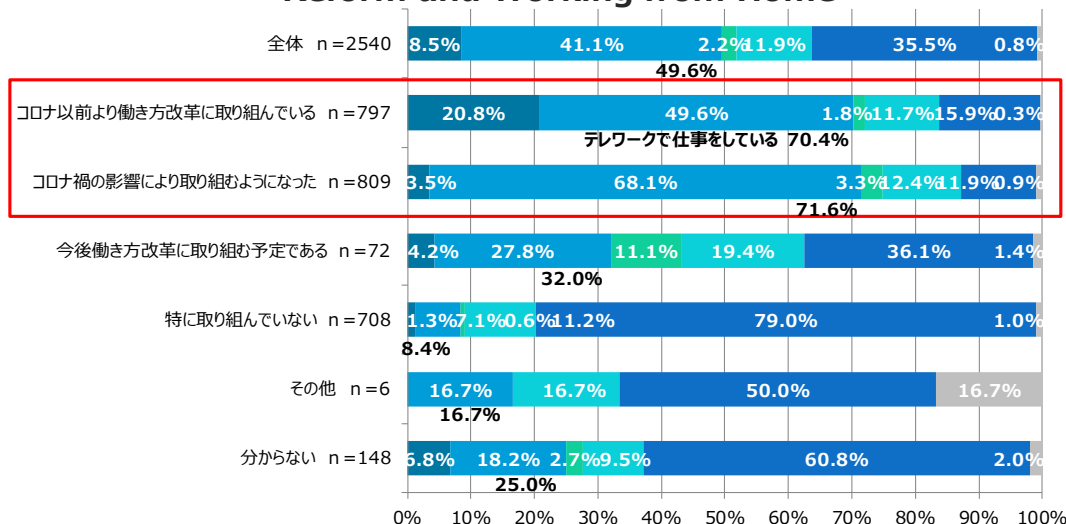


■ コロナ以前よりテレワークで仕事をしている  
■ コロナ禍の影響によりテレワークで仕事をするようになった  
■ 今後テレワークを導入する予定である（現在はテレワークを行っていない）  
■ 勤務先では導入しているが自分はテレワークを行っていない、またはテレワークで対応できない業務を担当している  
■ 勤務先ではテレワークを導入していない、またはテレワークで対応できない業種である  
■ その他

n=2,540

出所：「ワークスタイルに関するアンケート」  
（株式会社メイテック）

Ratio of Implementation of Working Style Reform and Working from Home



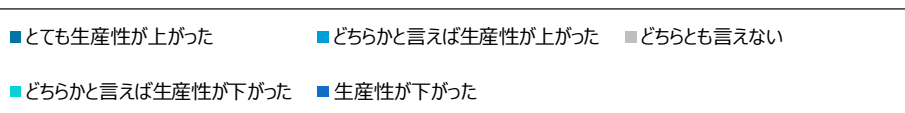
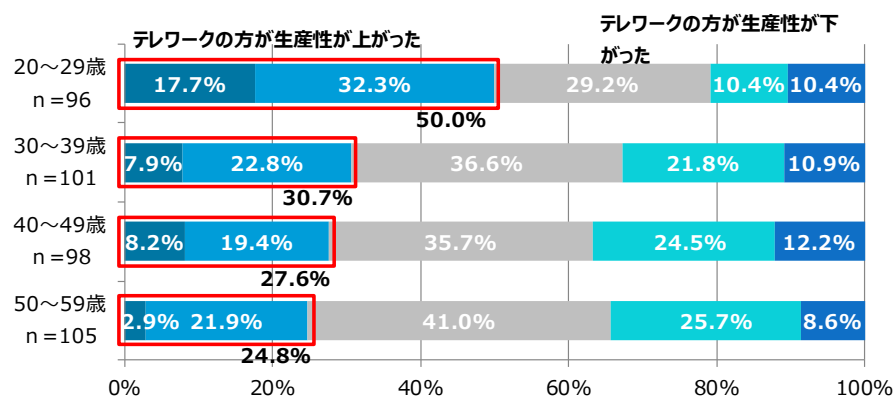
■ コロナ以前よりテレワークで仕事をしている  
■ コロナ禍の影響によりテレワークで仕事をするようになった  
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■ 勤務先ではテレワークを導入していない、またはテレワークで対応できない業種である  
■ その他

n=2,540

# Relation Between Productivity and Remote Work

- Although working from home has become more common, the older people are the more issues they have with it.

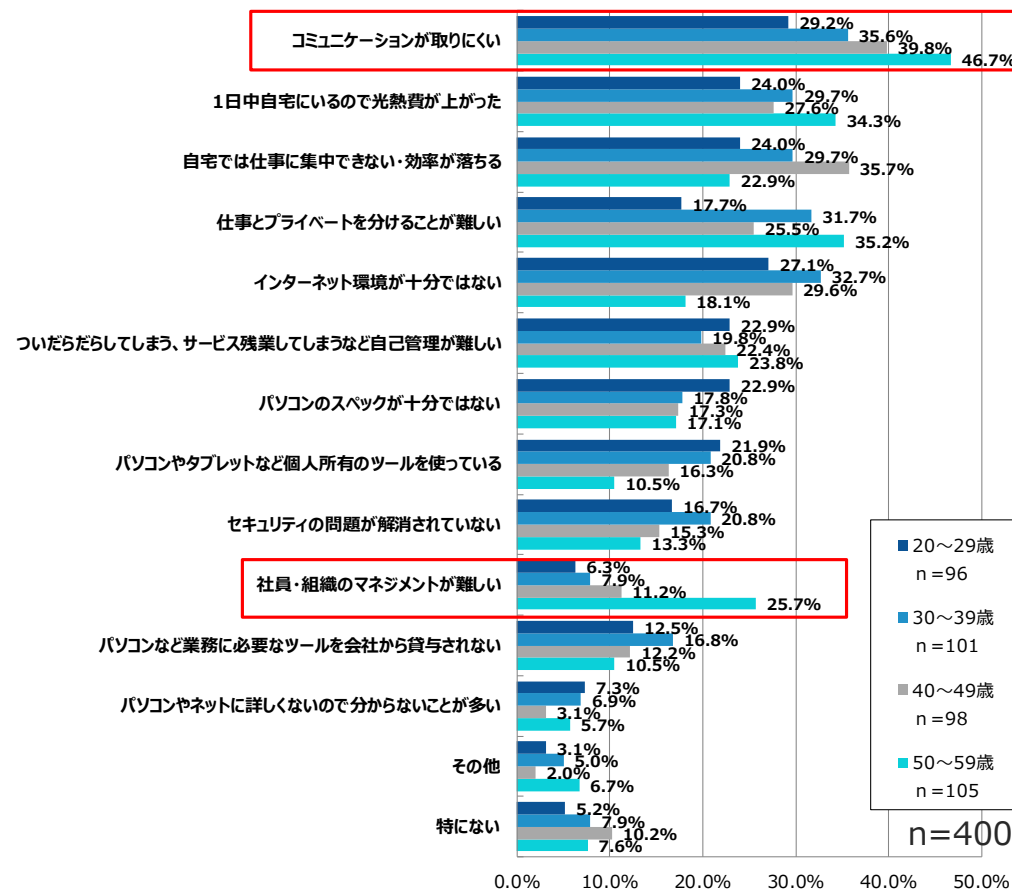
## Difference in Work Efficiency Between Working from Home and Going to the Office (By Age)



n=400

出所：「ワークスタイルに関するアンケート」  
 (株式会社メイテック)

## Issues in Working from Home (By Age)

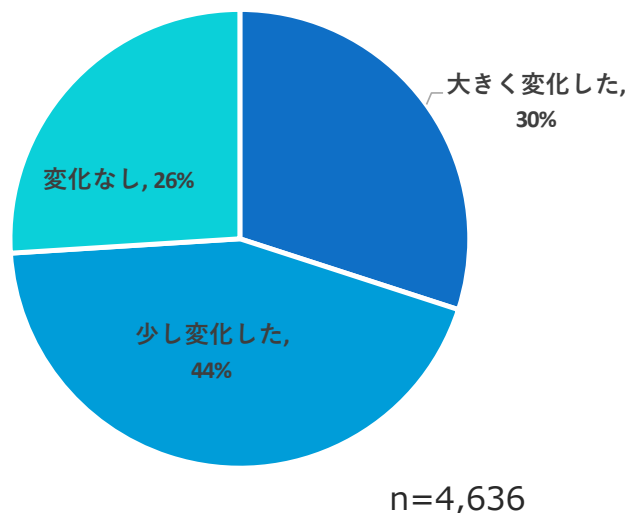


n=400

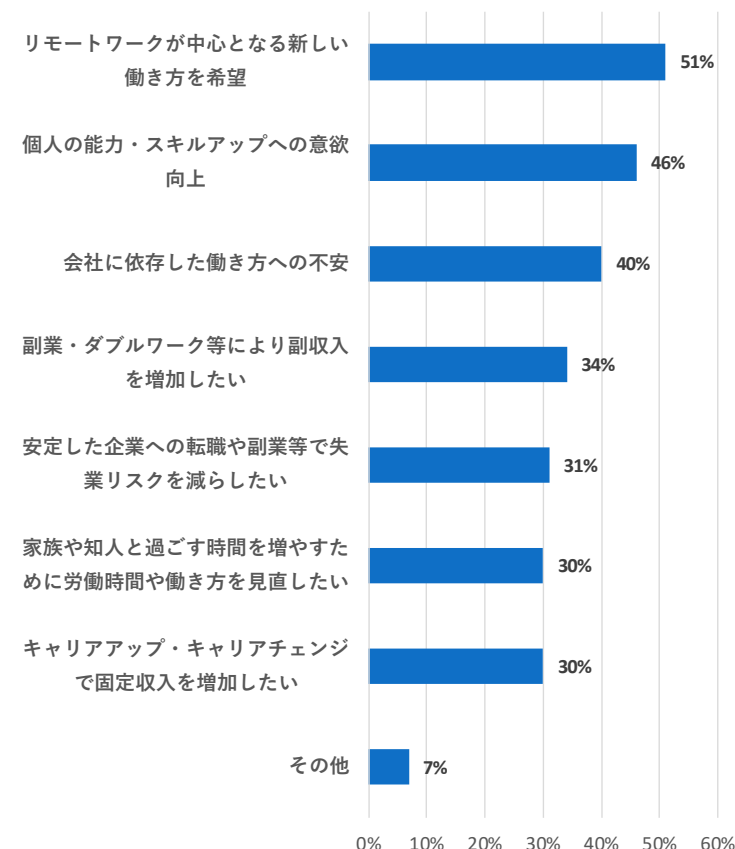
# Changes to Perceptions of Working in the Pandemic

- In the pandemic, significant changes can be seen in perceptions of how work should be done and careers.

Has Your Perception of Your Career and Changing Jobs Changed with the Spread of COVID-19? (Overall)



How Perceptions Have Changed  
(Multiple answers, by all respondents who said their perception changed)

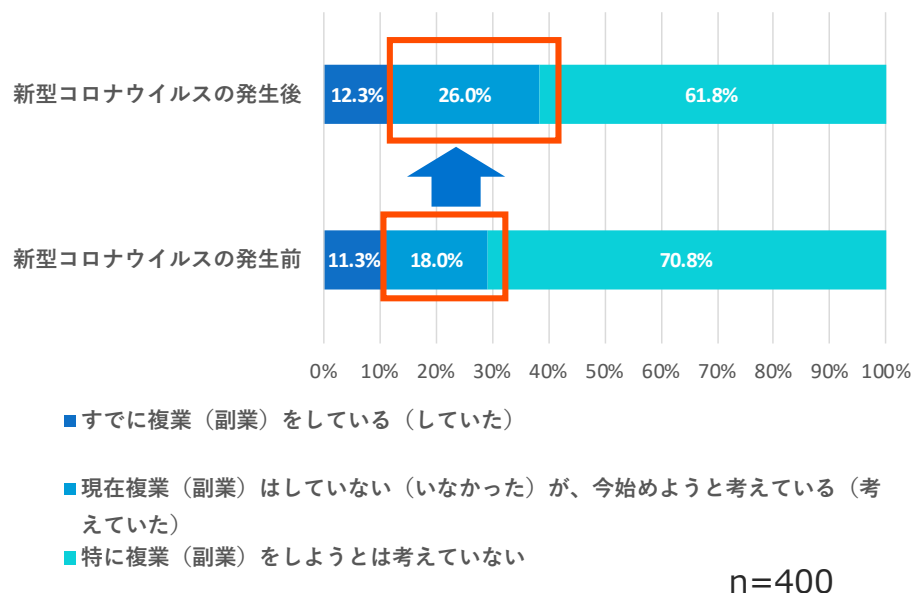


出所：「新型コロナ禍におけるキャリア・転職意識調査」（エンワールド・ジャパン株式会社）

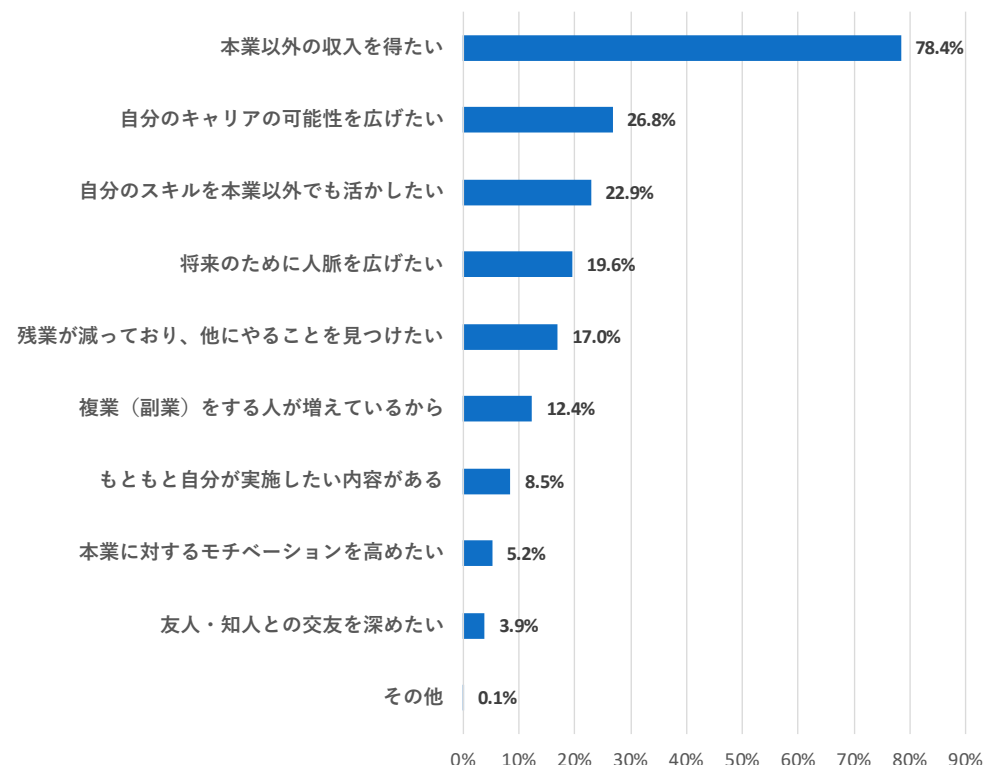
## Changes to Interest in Side Jobs

- COVID-19 led to higher interest in side jobs, with expanding career possibilities and income besides their main job given as reasons.

### Interest in Side Jobs Before and After Pandemic



### Reasons for Wanting a Side Job (Or Already Having One)



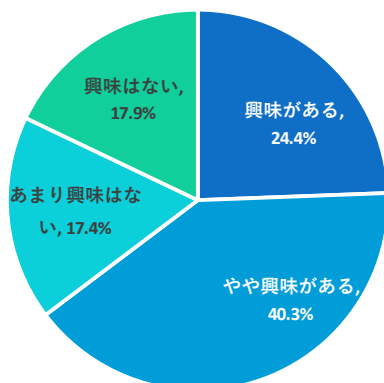
出所：「複業（副業）に関する意識・実態調査」  
 （パーソルプロセス&テクノロジー株式会社調べ）



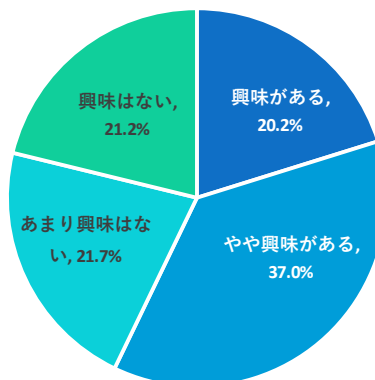
## Growing Diversity in Types of Side Jobs

- Interest in side jobs with SMEs in regional areas has been growing among workers in management positions at large companies.

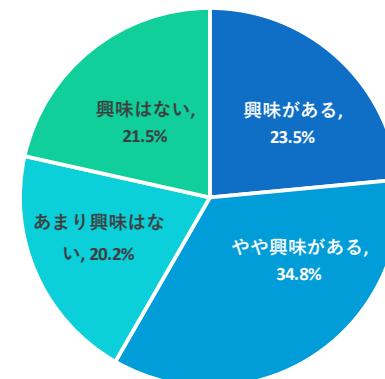
### Interest in Side Jobs One to Three Times Per Month at Regional SMEs



35～44歳



45～54歳



55～65歳

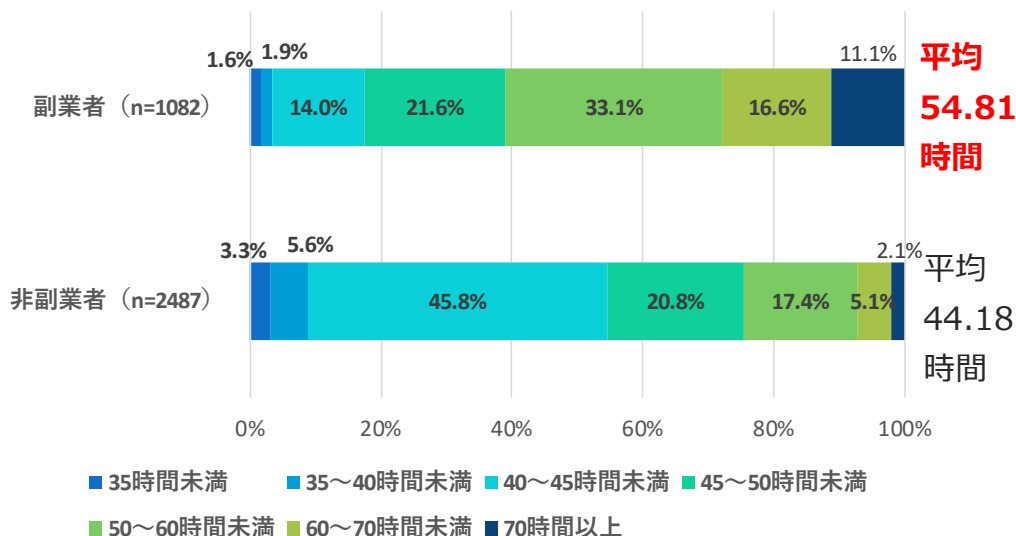
出所：「2020年度首都圏大企業管理職の地方への就業意識調査」  
 (株式会社みらいワークス)

35～44歳=414人、45～54歳=600人、55～65歳=600人

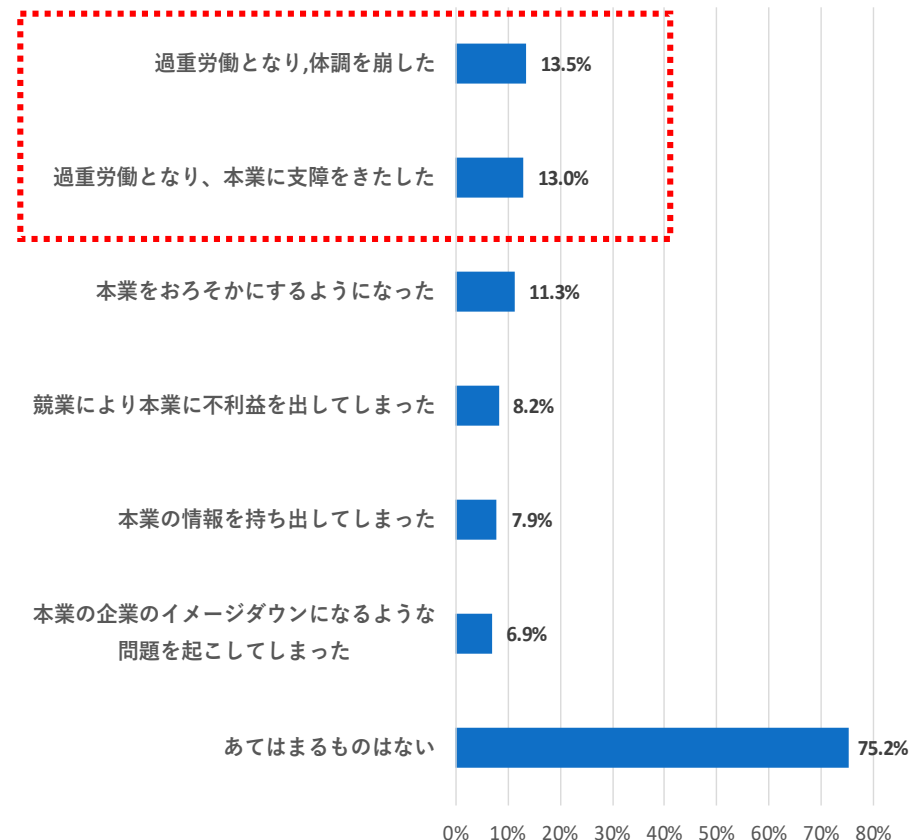
## Issues with Side Jobs

- When promoting side jobs, it will be necessary to deal with their demerits and problems such as long working hours.

Total Work Hours Per Week (%)



Demerits from Having a Side Job



副業者 n=1,082

出所：「副業の実態・意識調査」（株式会社パーソル総合研究所）



## 4. Future Trends and Issues for Working Styles

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# Future Trends and Issues for Working Styles

## Utilization of Diverse Human Resources

- ✓ The increase of remote work due to the pandemic will likely contribute to an environment allowing a greater diversity of people to work.
- ✓ However, policies so women will be given jobs with more responsibility will continue to be necessary.

## Expansion of Side Jobs

- ✓ Changes to perceptions of careers and working styles in the pandemic will likely contribute to more people having side jobs.
- ✓ Will side jobs have the benefit of assisting middle-aged and senior men (mostly) in building second careers, dealing with issues such as long working hours will also be necessary.

## Support for Career Development

- ✓ As diverse working styles such as working from home have become more accessible due to the pandemic, it is necessary for individuals to think about their own career independently.
- ✓ Support for career development should be provided not only for middle-aged and senior workers considering a second career, but for workers of all ages.