

# **9th Questionnaire Survey on the Effects of the Spread of COVID-19 on Telework-based Work Styles, Lifestyle, and Awareness (Preliminary Report)**

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The Toshihiro Okubo Laboratory, Faculty of Economics, Keio University, and the Nippon Institute for Research Advancement (NIRA) have conducted a new round of their “Questionnaire Survey on the Effects of the Spread of COVID-19 on Telework-based Work Styles, Lifestyle, and Awareness”. The purpose of these surveys has been to determine changes in the working styles, lifestyles, and awareness of workers nationwide due to the spread of COVID-19, in addition to the impact of the pandemic on their working lives. This round of the survey was conducted from Friday, March 3, 2023 to Monday, March 20, 2023. A total of 9,779 responses were received, all of which were from repeat respondents. Preliminary results are as follows.

## Key Points

- As of March 2023, the telework utilization rate among workers nationwide was 13% (23% in the Tokyo area). The telework utilization rate had remained almost flat for some time, but has recently been declining.
- The most recent decline in the telework utilization rate can be seen in both urban and rural areas. By industry, the declines were relatively large in the “Agriculture, fishing, forestry, and fisheries,” “Information service and research,” “Electricity, gas, water, and heat supply,” “Communications and information,” and “Finance and insurance” sectors, and in the categories “Managerial occupations,” “Other occupations,” and “Professional and technical occupations” by occupation.
- When work performance if working as usual (i.e., in the absence of the pandemic) was set at 100, the percentage of teleworkers who answered “100” increased significantly from June 2020 to March 2023.
- Teleworkers' use of ICT tools represented the highest rate of use of communication tools. The average work efficiency of teleworkers differed significantly depending on whether communication tools are used or not.
- The utilization rate of office and field automation tools among teleworkers was extremely low at 5% as of June 2020, but there is an upward trend.
- With regard to the willingness of respondents to pay for digital services, 70-80% expressed a reluctance to pay for such services, indicating that they would prefer them to be free. Among those willing to pay, the majority preferred a monthly expenditure ranging from 100 yen to a maximum of 1,000 yen.