



JETRO's Survey on Business Conditions of Japanese Companies in Canada Results of survey on Working Arrangements

Japan External Trade Organization (JETRO)

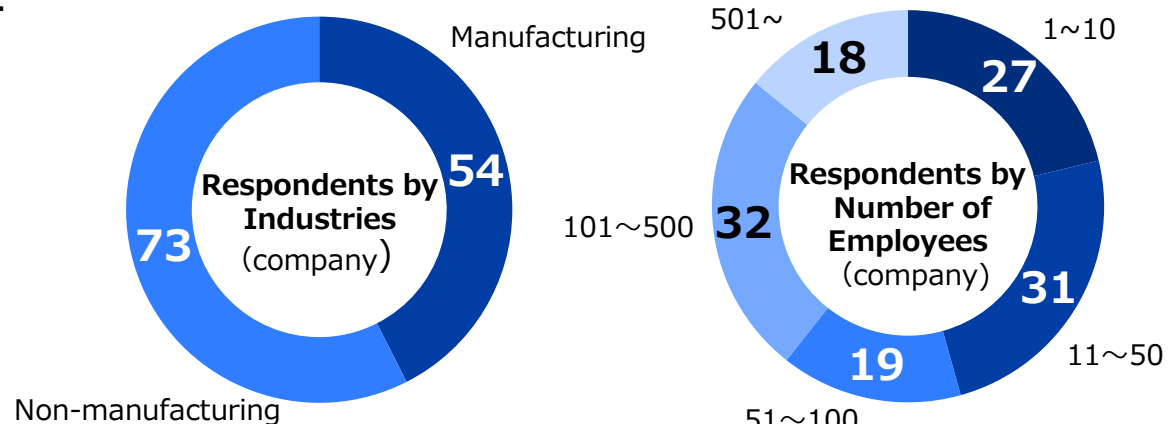
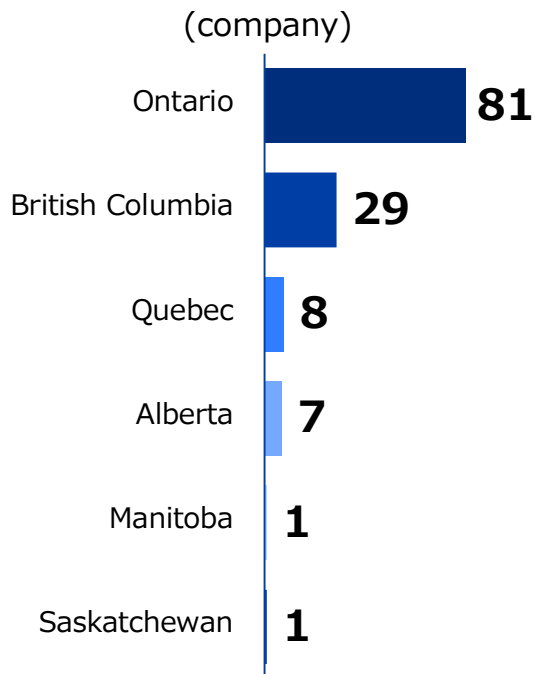
October 18, 2021

Survey Summary

- Survey Period: From September 8 to September 28, 2021
- No. of Respondents: **127 companies**

Breakdown of Respondents

Respondents by Regions



* The composition ratios of the survey results are rounded off to the first decimal place, so totals are not necessarily 100%.

Key Findings from the Survey Results

1. Working Arrangements as of September 1, 2021 - Attendance-Centric Working Arrangements Reaching Over 40% -

- For occupations where remote work is possible, 44% of companies had an attendance-centric working arrangement, almost matching the 45% of companies that had a remote work-centric working arrangements. The percentage answering that “As a general rule, all employees work at the office” was 23%, doubling from the April 2021 survey results (11%).
- For occupations where remote work is difficult, the percentage of respondents answering that “As a general rule, all employees work at the office” reached 85%. Compared to the results of the April 2021 survey, that percentage increased by 18 points.

2. Post-Covid-19 Working Styles - Transitioning to Hybrid Working Arrangements

Post-Covid-19 -

- Regarding post-Covid-19 working arrangements, 40% answered that “As a general rule, all employees work at the office,” and the percentage of companies planning a hybrid working arrangements that uses both physical attendance and remote work reached nearly 50%.
- Looking by sector, the percentage of respondents answering that “As a general rule, all employees work at the office” were 54% in the manufacturing sector, and 30% in non-manufacturing sectors.

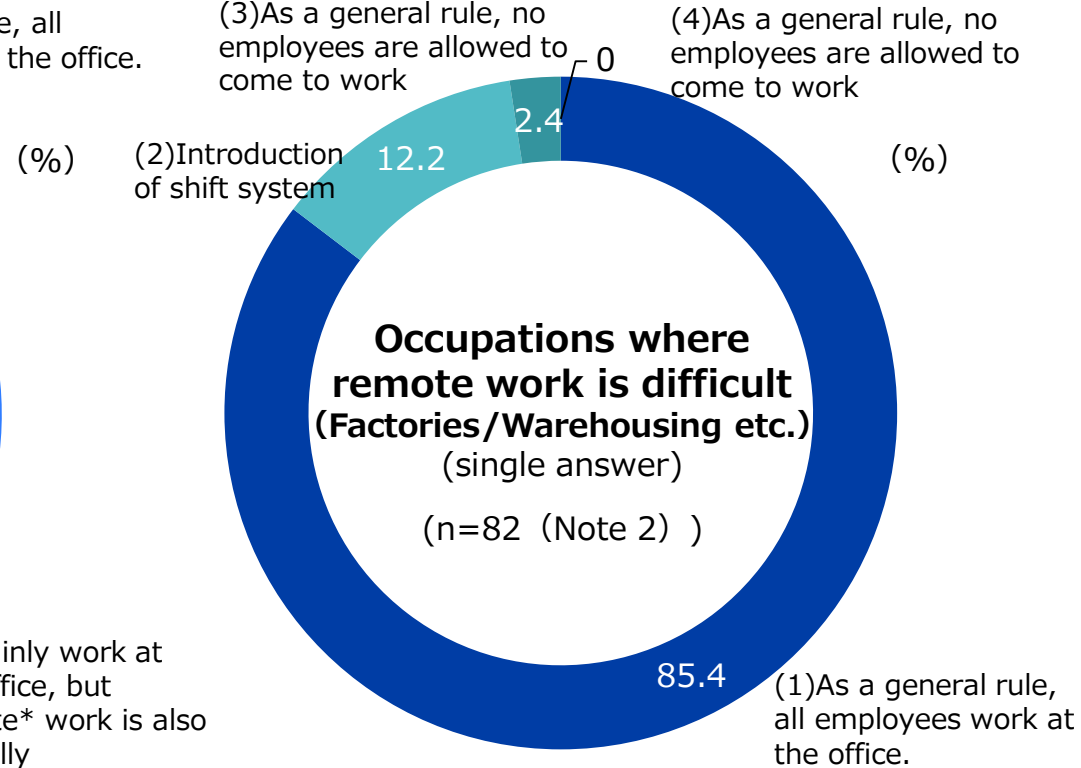
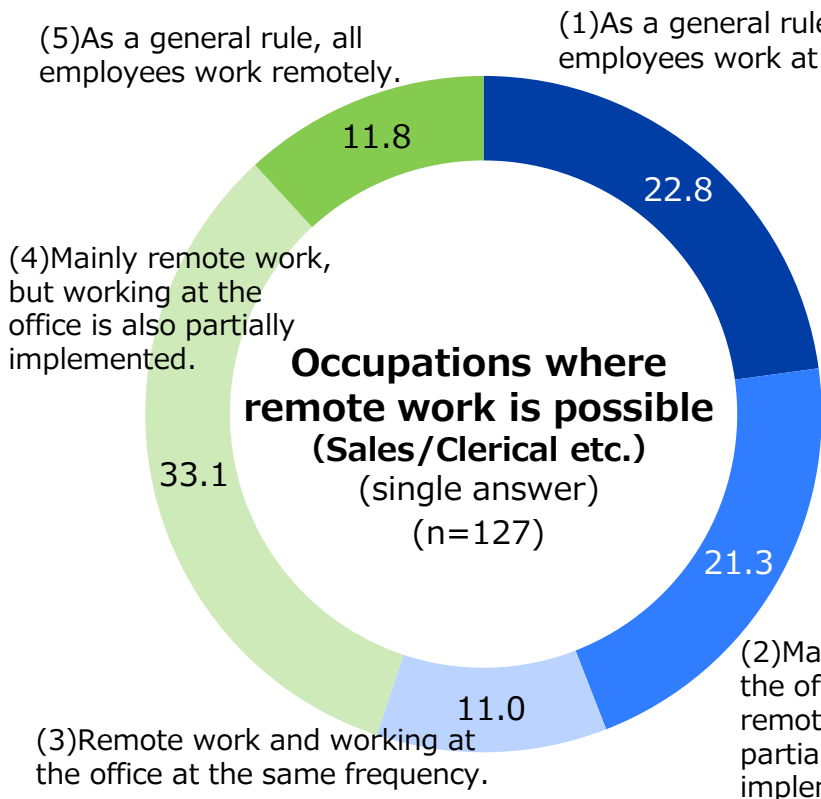
3. Post-Covid-19 Issues and Initiatives - Promoting Hybrid Work and Going Paperless -

- Regarding vaccines, challenges such as managing the vaccination status of employees and dealing with unvaccinated employees were cited. Regarding remote work, it was pointed out that differences in thinking among individual employees, the weakening of communication, and human resource development were challenges.
- Initiatives cited included standardizing hybrid work and going paperless for documents.

1-1 | Working Arrangements as of September 1, 2021

- Overall Results -

- **For occupations where remote work is possible (Note 1),** respondents answering **“Mainly remote work, but working at the office is also partially implemented”** were the largest group at **33.1%**. Including the 11.8% that answered that **“As a general rule, all employees work remotely,”** a **total of 44.9% of respondents had an arrangement centered on remote work.**
- **For occupations where remote work is difficult,** the percentage of respondents answering that **“As a general rule, all employees work at the office”** reached **85.4%**, followed by 12.2% answering **“Introduction of shift system.”**

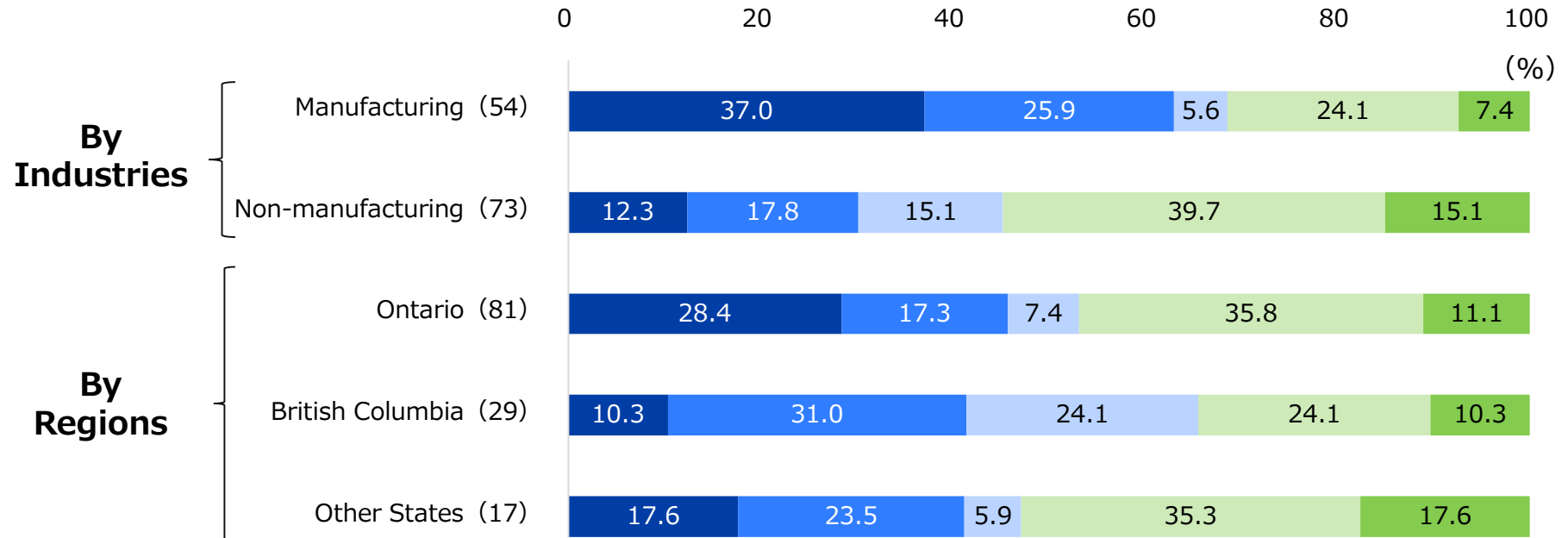


(Note 1) In the questionnaire, we asked all companies about their working arrangements for occupations where remote work is possible and for occupations where it is not. "Remote work" assumes working outside of the office, including at home.

(Note 2) The 32 companies that answered "No applicable positions" are excluded.

1-2 | Working Arrangements as of September 1, 2021 (Industries Where Remote Work is Possible) - By Industry/Province -

- Looking by sector, in the **manufacturing sector**, respondents answering that **“As a general rule, all employees work at the office”** were the largest group at **37.0%**, followed by those answering that **“Mainly work at the office, but remote* work is also partially implemented,”** at 25.9%. In **non-manufacturing sectors**, respondents answering that **“Mainly remote work, but working at the office is also partially implemented”** reached **39.7%**.
- Looking by province, compared to **British Columbia**, where the manufacturing sector represents less than 20% of business, in **Ontario**, where the manufacturing sector represents more than 50% of business, nearly three times more respondents answered that **“As a general rule, all employees work at the office,”** at **28.4%**.



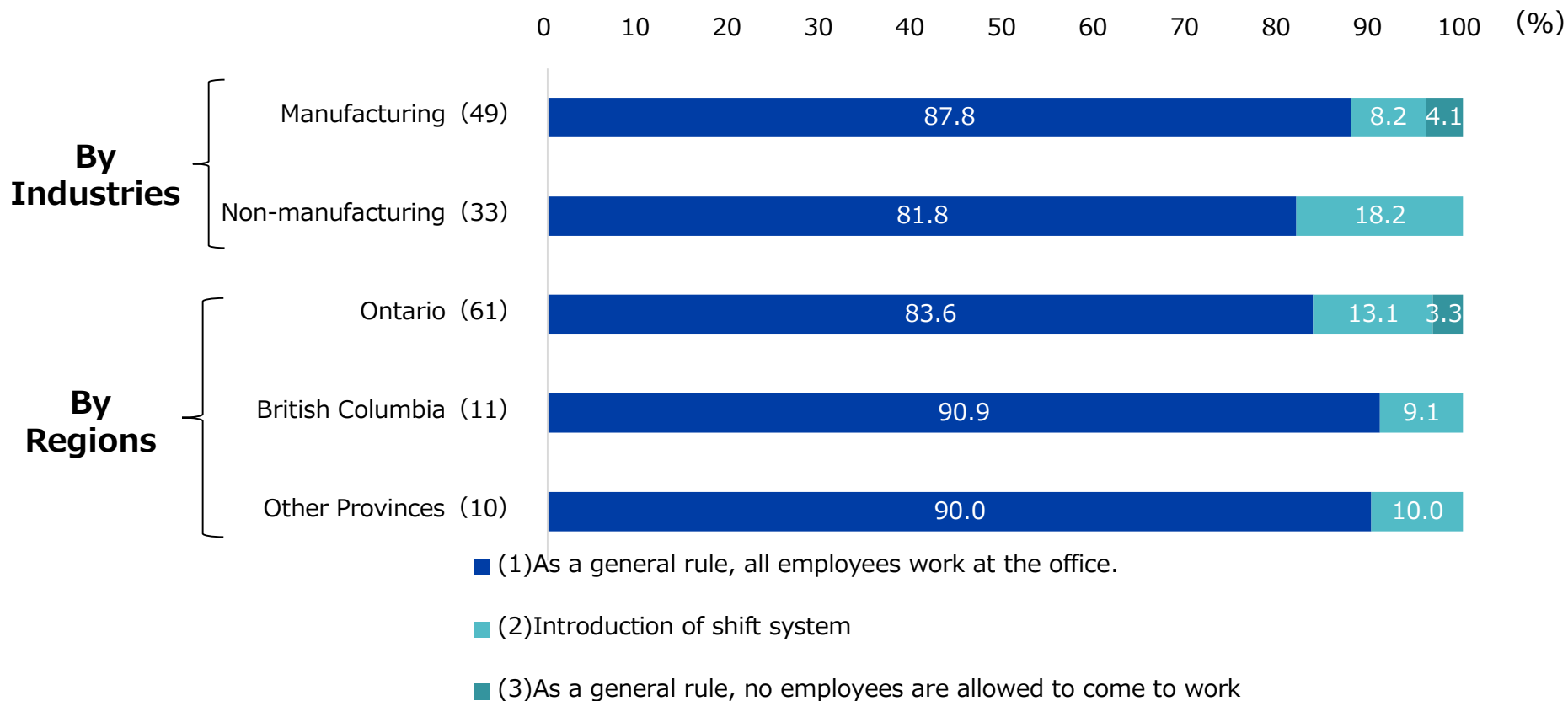
- (1) As a general rule, all employees work at the office.
- (2) Mainly work at the office, but remote* work is also partially implemented.
- (3) Remote work and working at the office at the same frequency.
- (4) Mainly remote work, but working at the office is also partially implemented.
- (5) As a general rule, all employees work remotely

(Note) "Remote work" assumes working outside of the office, including at home.

(Note) The numbers of corporate respondents are shown in parentheses.

1-3 | Working Arrangements as of September 1, 2021 (Industries Where Remote Work is Difficult) - By Industry/Province -

- **Looking by sector**, the percentage of respondents answering **“As a general rule, all employees work at the office”** reached **87.8% in the manufacturing sector**, and was **81.8% in non-manufacturing sectors**. The percentage of respondents answering that they had **“Introduced a shift system”** was 18.2% in **non-manufacturing sectors**.
- Looking by **province**, the percentage of respondents answering that **“As a general rule, all employees work at the office”** reached **90.9% in British Columbia** and was **83.6% in Ontario**.

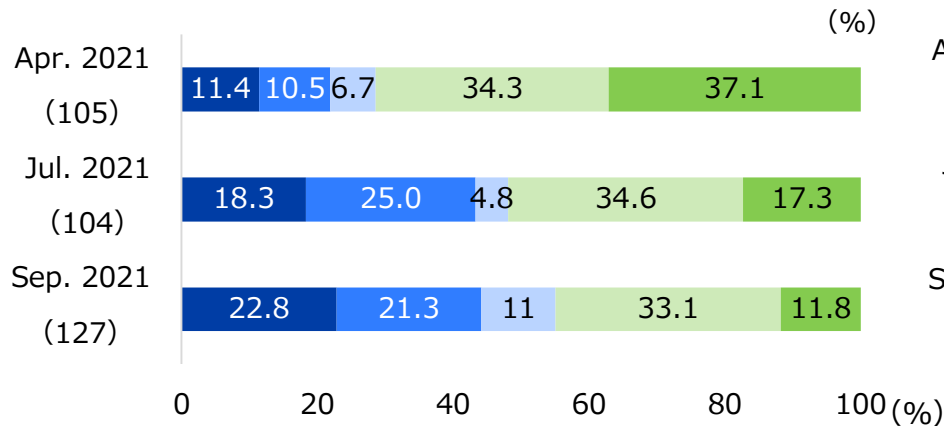


(Note) The numbers of corporate respondents are shown in parentheses.

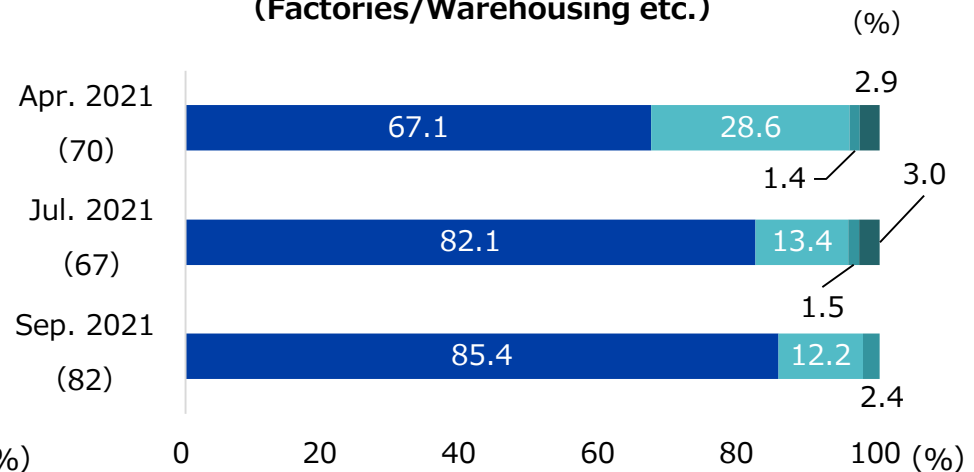
1-4 | Working Arrangements as of September 1, 2021 - Comparison with Previous Survey Results -

- With regard to **working arrangement in place as of September 1, 2021, compared to the April 2021 survey results**, the percentage of respondents answering that **"As a general rule, all employees work at the office" doubled for occupations where remote work is possible, and increased to 18.3% even for occupations where remote work is difficult**. The percentage of respondents answering that **"As a general rule, all employees work remotely" decreased from April 2021 (37.1%) to less than one-third of that (11.8%)**.
- The percentage of respondents answering that they had conducted an **"Introduction of a shift system" decreased from the percentage in April 2021 (28.6%) to less than half of that (12.2%)**.

**Occupations where remote work is possible
(Sales/Clerical etc.)**



**Occupations where remote work is difficult
(Factories/Warehousing etc.)**



■ (1)As a general rule, all employees work at the office.

■ (2)Mainly work at the office, but remote* work is also partially implemented.

■ (3)Remote work and working at the office at the same frequency

■ (4)Mainly remote work, but working at the office is also partially implemented.

(Note) "Remote work" assumes working outside of the office, including at home.

(Note) The numbers of corporate respondents are shown in parentheses.

■ (1)As a general rule, all employees work at the office.

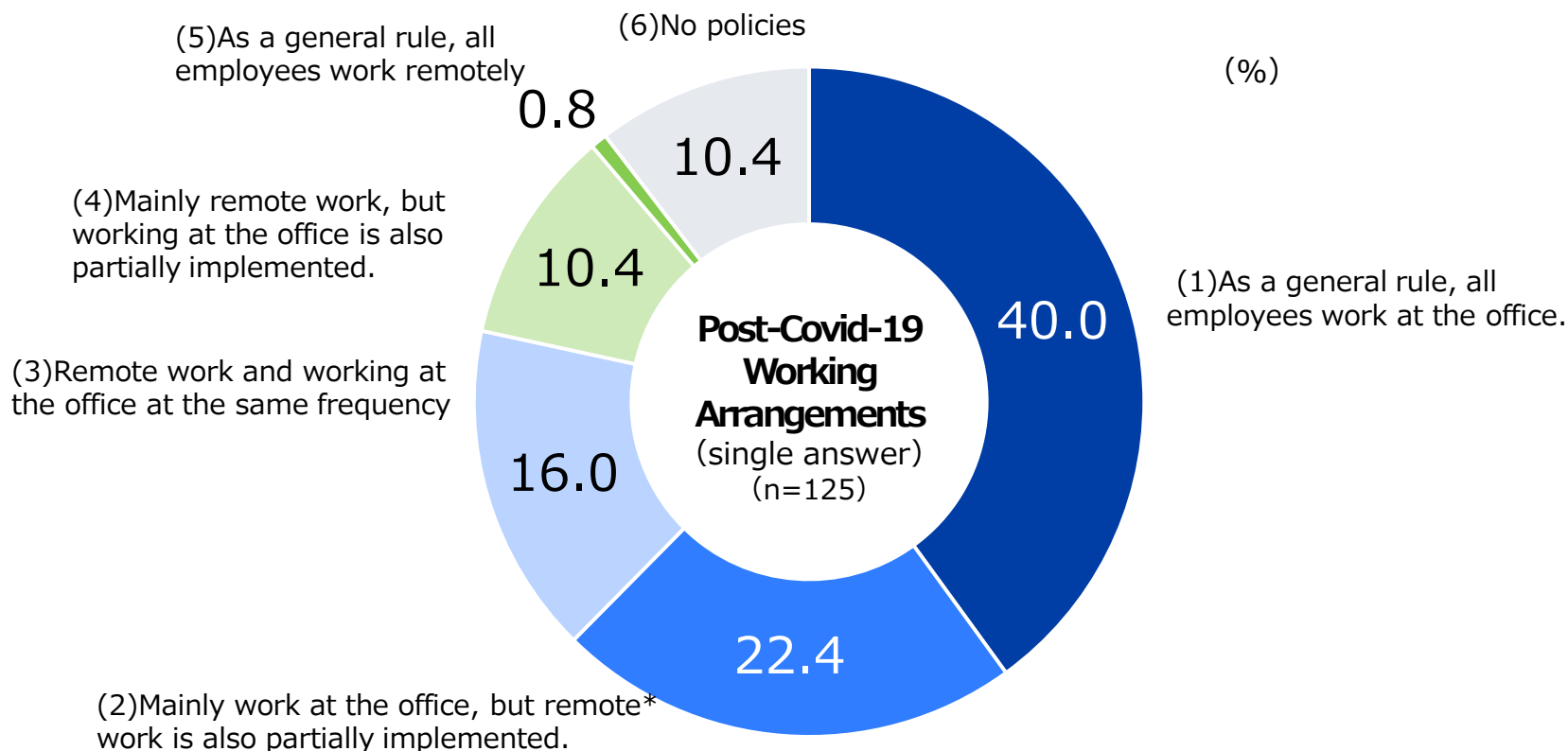
■ (2)Introduction of shift system

■ (3)Change in work contents and assignment of tasks that can be done at home

■ (4)As a general rule, no employees are allowed to come to work

2-1 | Post-Covid-19 Working Arrangements - Overall Results -

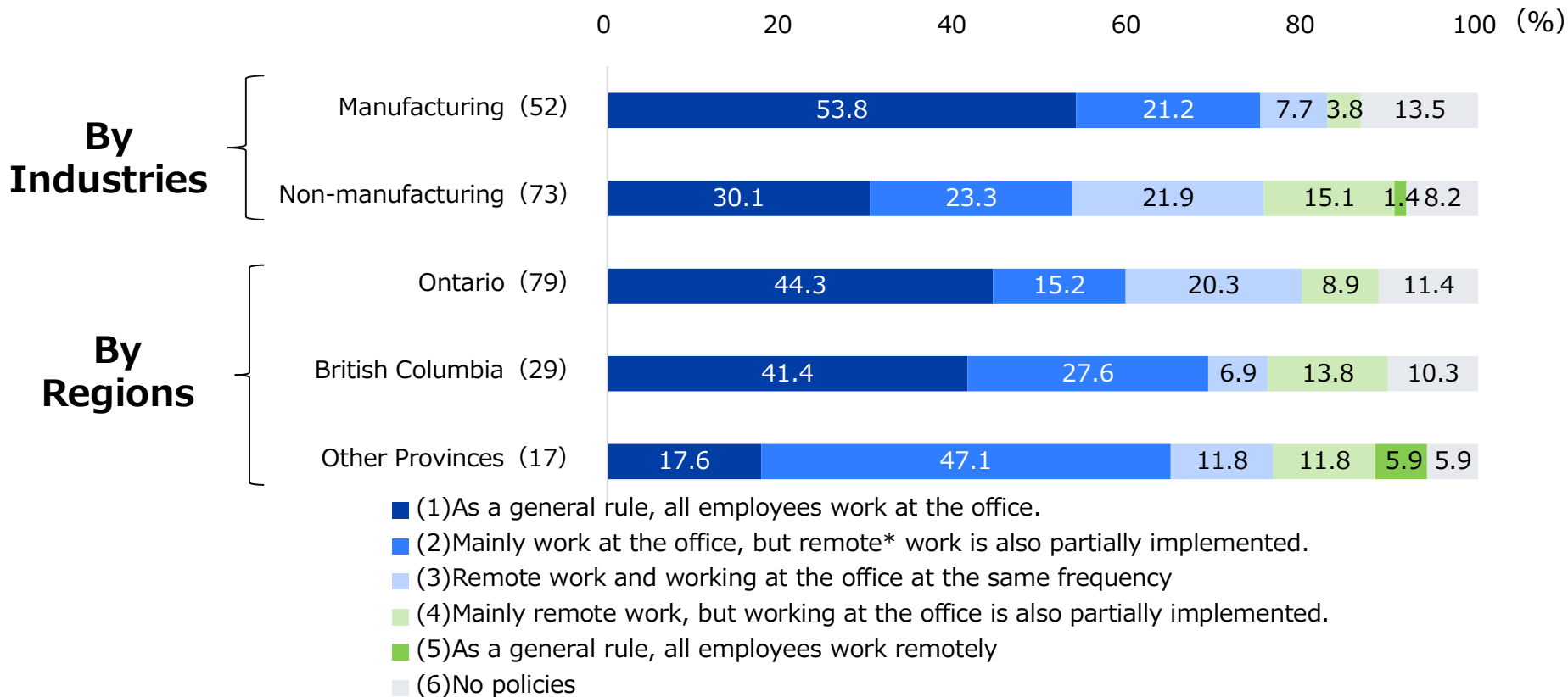
- Regarding **post-Covid-19 working arrangements**, with **40.0%** of respondents answering that “As a general rule, all employees work at the office,” **the percentage of companies that are planning a hybrid working arrangement that uses both physical attendance and remote work reached 48.8%**. Only 0.8% of respondents answered that “As a general rule, all employees work remotely,” with 10.4% answering “No policies.”



(Note) "Remote work" assumes working outside of the office, including at home.

2-2 | Post-Covid-19 Working Arrangements - By Industry/Province -

- In the **manufacturing sector**, the percentage of respondents answering that **“As a general rule, all employees work at the office”** was **53.8%**, followed by those answering “Mainly work at the office, but remote work is also partially implemented,” at 21.2%. In **non-manufacturing sectors**, the percentage of respondents answering that **“As a general rule, all employees work at the office”** was **30.1%**, followed by those answering “Mainly work at the office, but remote work is also partially implemented,” at 23.3%.
- **By province**, respondents answering that **“As a general rule, all employees work at the office”** accounted for more than 40% in both **Ontario (44.3%)** and **British Columbia (41.4%)**.

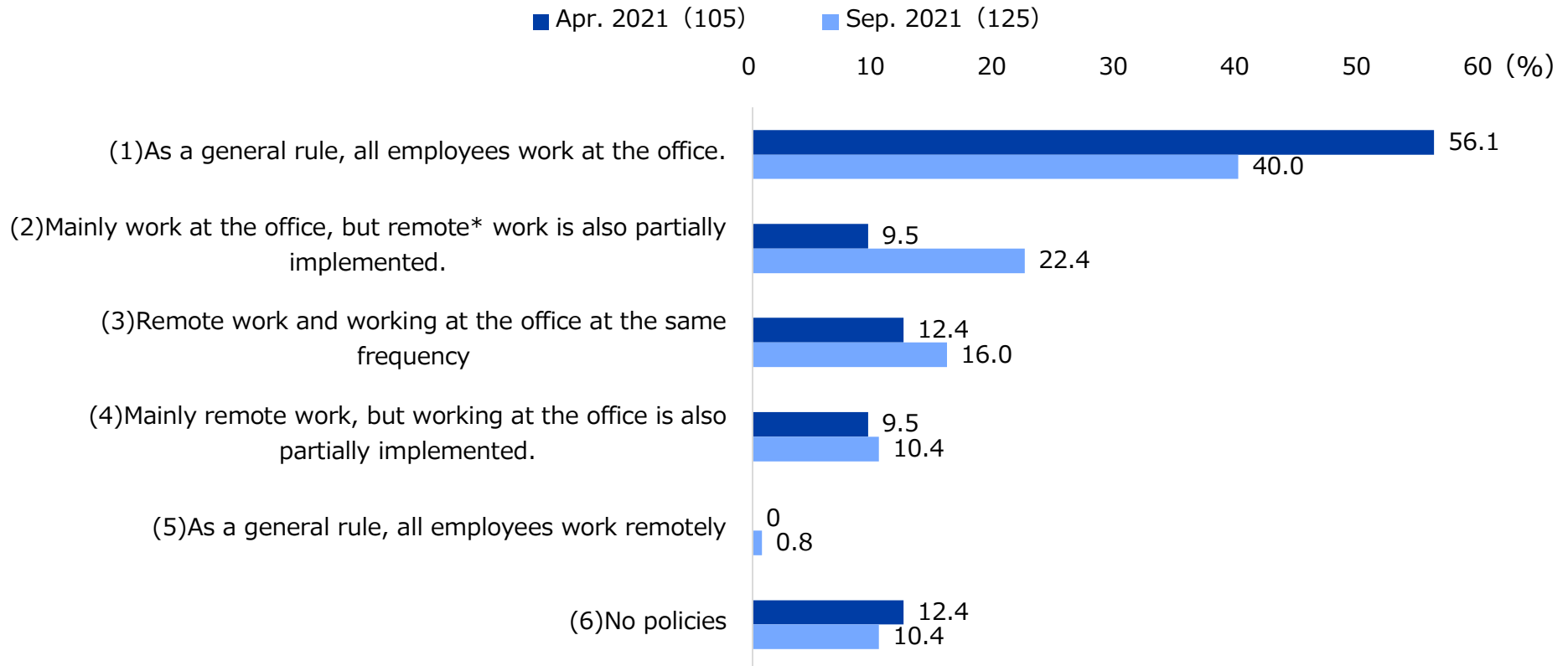


(Note) "Remote work" assumes working outside of the office, including at home.

(Note) The numbers of corporate respondents are shown in parentheses.

2-3 | Post-Covid-19 Working arrangements - Comparison with Past Survey Results -

- With regard to **post-Covid-19 working arrangements**, compared to the April 2021 survey results, the percentage of respondents answering that **“As a general rule, all employees work at the office”** fell by **16.1 points**.
- Meanwhile, with the percentage of respondents answering **“Mainly work at the office, but remote work is also partially implemented”** increasing from **April 2021 (9.5%) by 2.4 times (to 22.4%)**, companies are considering **more flexible working arrangements**, such as **physical attendance incorporating remote work**.



(Note) "Remote work" assumes working outside of the office, including at home.

(Note) The numbers of corporate respondents are shown in parentheses.

3 | Post-Covid-19 Issues, Concerns, and Initiatives (Open-Ended Answers)

1. Post-Covid-19 Issues and Concerns

- **Managing the vaccination status** of our employees. (Sales companies/Sales subsidiaries)
- **Dealing with unvaccinated employees.** (Finance/Insurance)
- **Differences in thinking among employees** regarding remote work. (Food)
- **The weakening of communication and human resources development** if remote work is implemented. (Sales companies/Sales subsidiaries)
- **Considering the need to secure office space** in cases where business can be done from home. (Trading/Wholesale)
- Wanting to aim for 100% resumption of commuting to the workplace as before, **but being unsure what to do about employee awareness that the work can be done remotely.** (Precision machines/Medical equipment)
- Looking for **work styles and best practices in the workplace during/post-Covid-19.** (Trading/Wholesale)
- **To what extent will restrictions on sales** (visits, visitors, business trips) and **temporary reentry** be relaxed? (Information and communications)

2. Post-Covid-19 Initiatives

- **Standardizing hybrid work.** (Precision machines/Medical equipment)
- Promoting **cross-workplace initiatives (SDGs, etc.)** in order to eliminate the lack of communication and isolation among employees due to the expansion of remote work. (Transportation)
- Promoting **going paperless for necessary work documents.** (Travel/Amusement)
- **Implementing company-specific measures** for Covid-19 (mandatory masks wearing/curtains installed on production lines). (Transportation equipment)
- **Sorting out work done in the office and work that can be done remotely** to make the necessity of going to work better understood. (Trading/Wholesale)

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