



ROBERT WALTERS WHITEPAPER

EMPLOYEE INSIGHTS SURVEY 2016

ROBERT WALTERS

INTRODUCTION

This survey was conducted on 1,459 bilingual professionals in Japan, and summarizes their attitudes toward their workplaces and changes of employment. The factors that respondents valued in their current office environments and when changing employment were compared based on factors such as age, gender, and industry.

The effective job-opening-to-applicant ratio in Japan is currently on the rise, and the labor shortage problem is becoming increasingly serious. As such, it has become an urgent task for companies to put in place measures for securing talented professionals.

While there is a need to offer competitive salaries based on market conditions and competitor activity, understanding the evaluation criteria used by professionals working in Japan to decide on the companies to switch to and how they appraise the companies they are currently employed in or their dissatisfactions with these companies, is important when attempting to successfully hire highly skilled specialists and improve retention rates.

This survey reveals varying values and attitudes according to differences in demographics, and provides key points that human resource and hiring managers should take into consideration in order to secure talented professionals.

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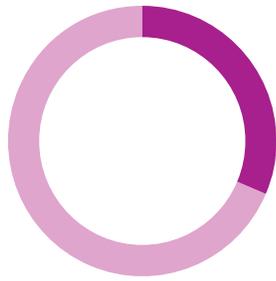
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WOMEN'S EMPOWERMENT IN THE WORKPLACE

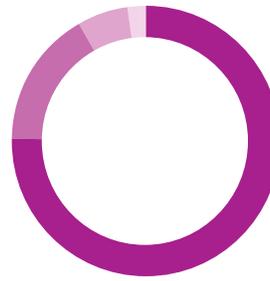
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DEMOGRAPHICS



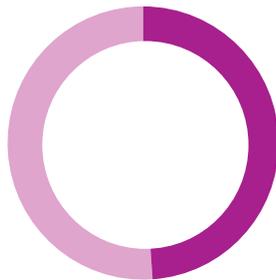
GENDER

- Female 31.5%
- Male 68.5%



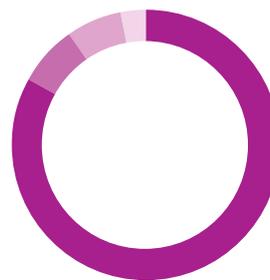
WORK LOCATION

- Kanto region 75.4%
- Kansai region 16.2%
- Other regions in Japan 6.2%
- Overseas 2.1%



TYPE OF COMPANY THAT YOU WORK AT

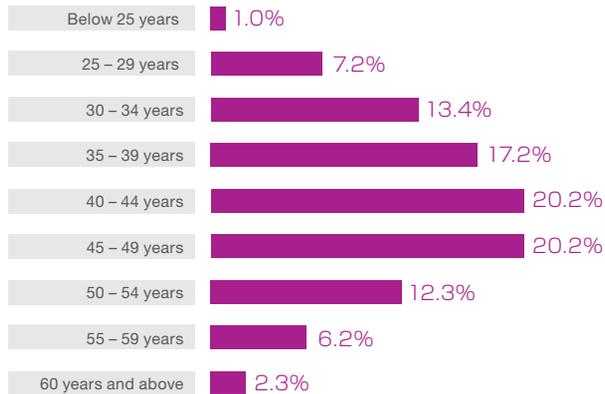
- Japanese-owned company 48.9%
- Foreign-owned company 51.1%



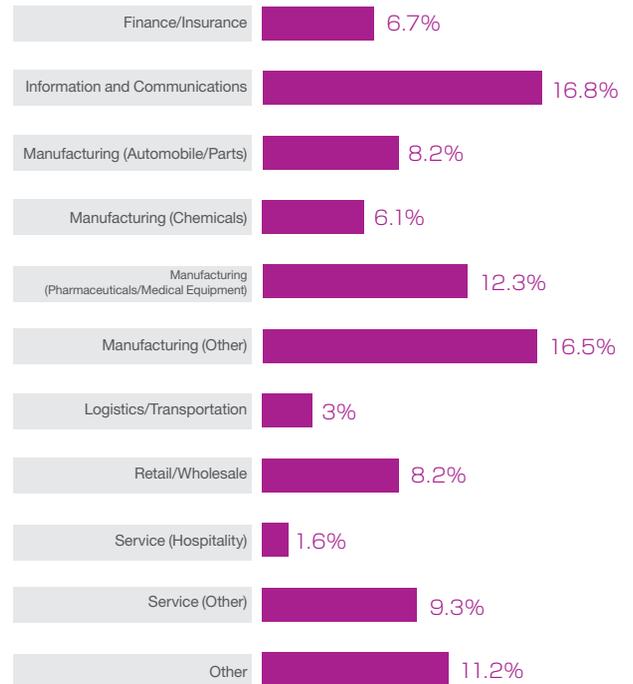
EMPLOYMENT STATUS

- Permanent employee 83.0%
- Contract employee 7.3%
- Dispatched employee 6.6%
- Other 3.0%

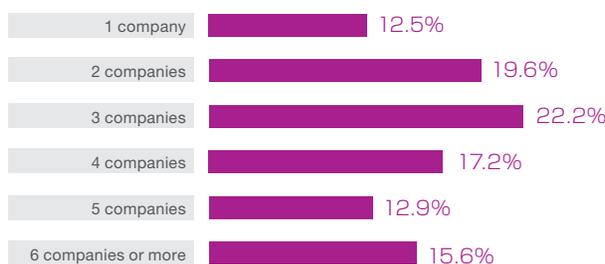
AGE



INDUSTRY



NUMBER OF COMPANIES THAT RESPONDENTS HAVE WORKED AT



OFFICE ENVIRONMENT

WHAT DO YOU RATE MOST HIGHLY AT YOUR CURRENT WORKPLACE?

The largest percentage of respondents (approximately 30%) selected “Job content” as the element that they rate most highly at their current workplace. Other elements such as “Salary” and “Working hours” that can be controlled institutionally by the company, as well as “Soft” aspects such as “Corporate culture” and “Interpersonal relationships,” were also highly rated. Differences also emerged based on the type (Japanese-owned or foreign-owned) of the company. In foreign-owned companies, respondents indicated a high level of satisfaction with “Salary” and “Opportunities to increase skills.” On the other hand, in Japanese-owned companies, a prominently large number of respondents selected “Nothing in particular” in addition to “Welfare & benefits system” and “Work location.”

For respondents who selected “Other,” the factors raised ranged from “Recognition of diverse working styles,” “Gender equality” and “Stability,” to factors rating the strengths of the company such as “Long-term strategy of the company” and “Growth” as well as “Brand management methods” and “Product line-up.”



JOB CONTENT
27.6%

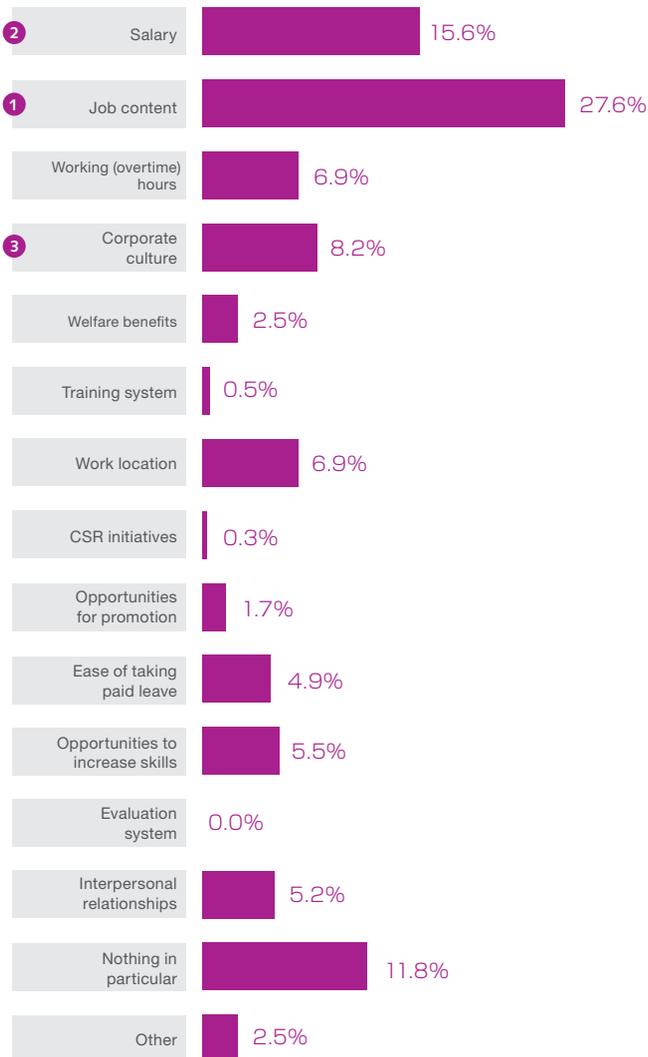


SALARY
15.6%



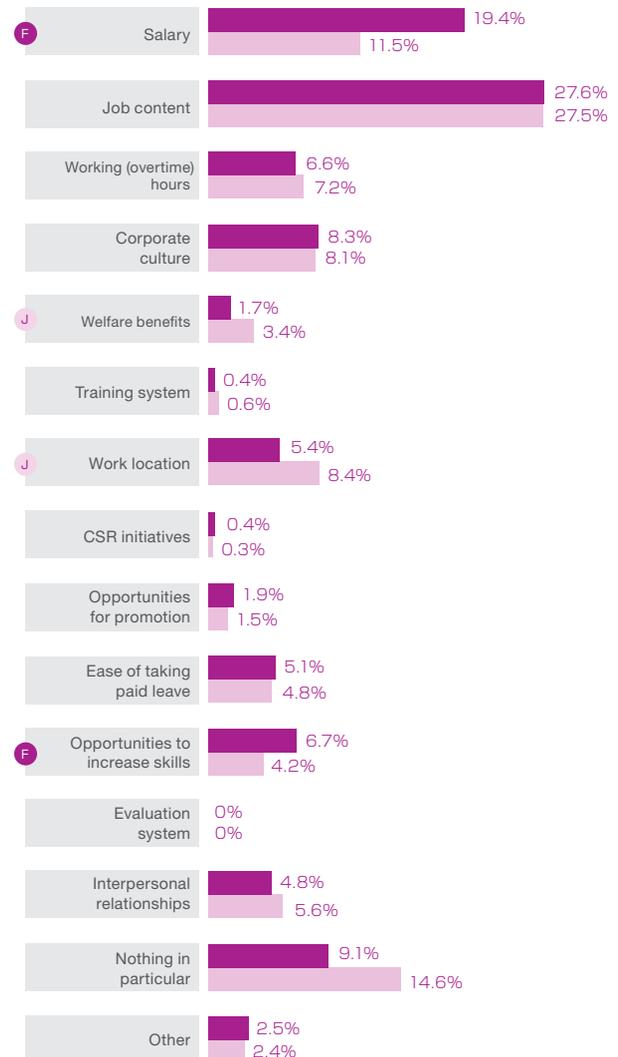
CORPORATE CULTURE
8.2%

OVERALL



RESPONSES BY JAPANESE-OWNED COMPANIES/ FOREIGN-OWNED COMPANIES

■ Foreign-owned companies ■ Japanese-owned companies

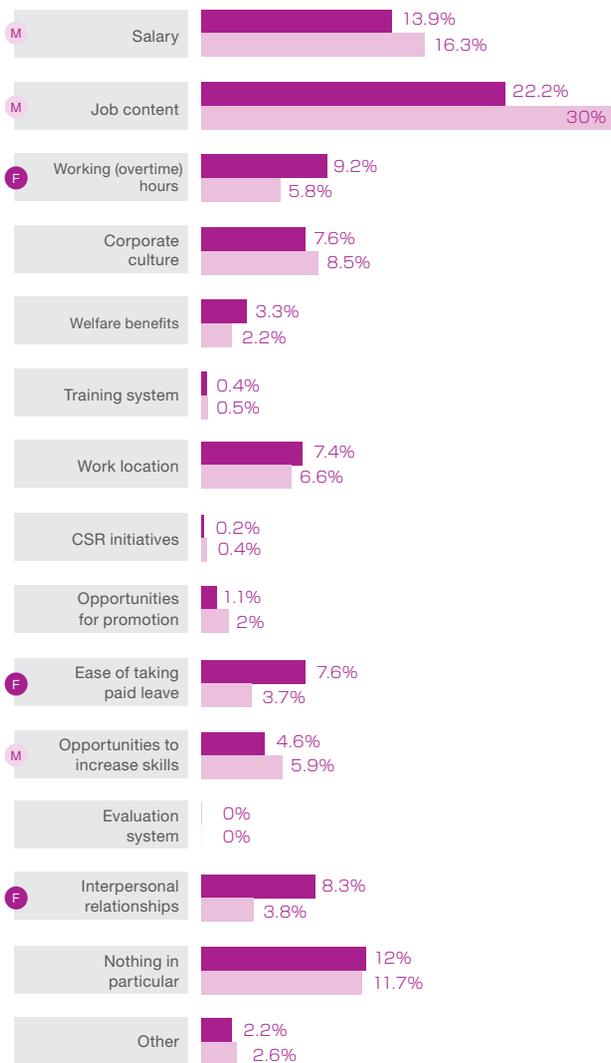


RESPONSES GIVEN UNDER “OTHER” :

Recognition of diverse working styles / Gender equality / Stability / Long-term strategy of the company / Growth / Brand management methods / Product line-up

RESPONSES BY GENDER

■ Female ■ Male



30%

WHILE THE PERCENTAGE OF MALE RESPONDENTS THAT GAVE "JOB CONTENT" A HIGH RATING REACHED AS HIGH AS 30%, THE PROPORTION WAS 22.2% AMONG WOMEN, MAKING THIS THE ITEM WITH THE LARGEST GENDER GAP.



WHICH AREA DO YOU MOST WISH TO SEE IMPROVEMENTS IN AT YOUR CURRENT WORKPLACE?

An overwhelming number of respondents selected "Salary." We could say that there is a strong possibility that a company offering a higher salary for the same type of job can raise motivation for change of employment. On the other hand, "Job content" also ranked among the top areas that respondents most wish to see improvements in. In addition to dissatisfaction toward factors that are directly linked to the job, such as "Lack of opportunities for promotion" and "Working hours," there were also a significant number of respondents calling for improvements in "Corporate culture" and "Interpersonal relationships." Comparing the type of companies, there was somewhat less dissatisfaction with Japanese-owned companies than foreign-owned companies for many of the items, although dissatisfaction with "Salary" was prominent among the former.

Under "Other," there were many responses related to management style, such as "Medium to long-term business strategy," "Transparency of the company," "Speed of decision-making processes," and "Repeated organizational changes." "Strengthening compliance" was also brought up. There were also demands for improvements in employment style, such as "Conversion of dispatched employees to permanent employees." In addition, there were also multiple answers indicating dissatisfaction with the office environment, including areas such as "Small office space" and "Segregation of smoking and non-smoking areas."



SALARY
25.1%

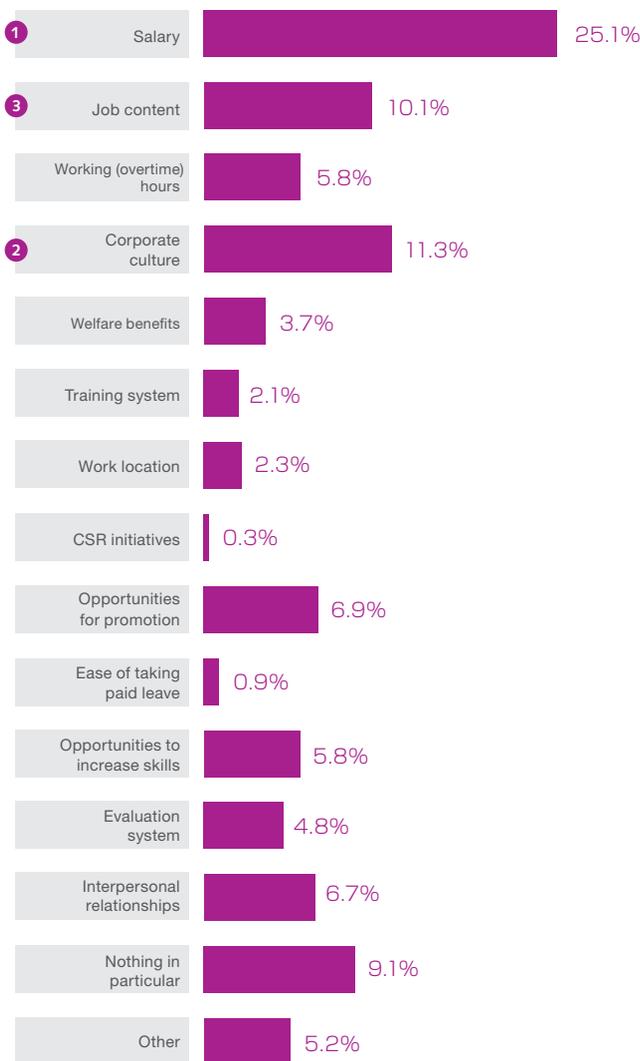


CORPORATE CULTURE
11.3%



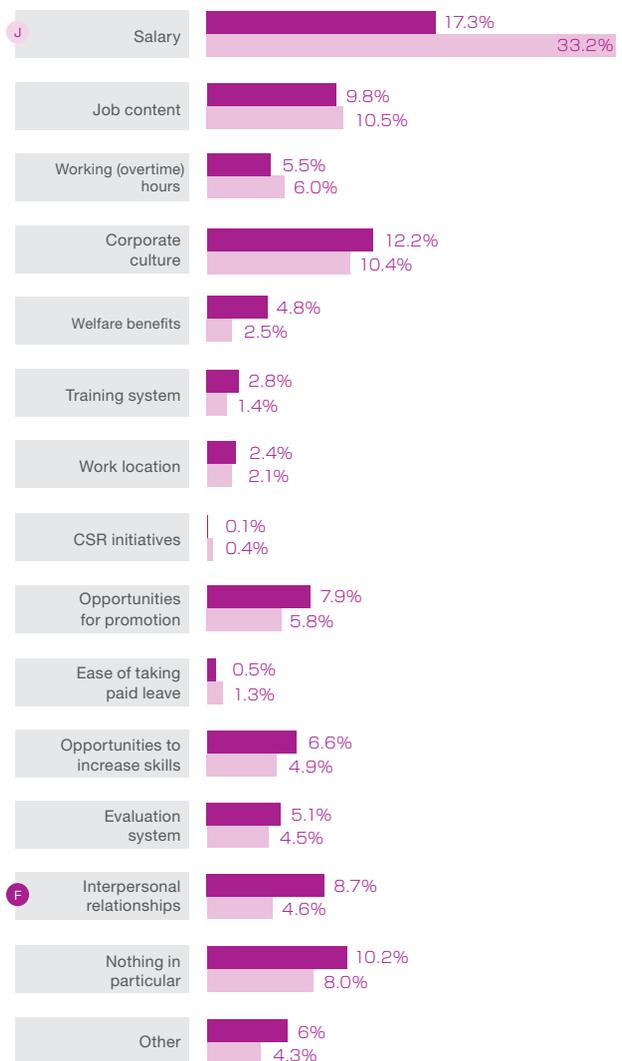
JOB CONTENT
10.1%

OVERALL



RESPONSES BY JAPANESE-OWNED COMPANIES / FOREIGN-OWNED COMPANIES

■ Foreign-owned companies ■ Japanese-owned companies

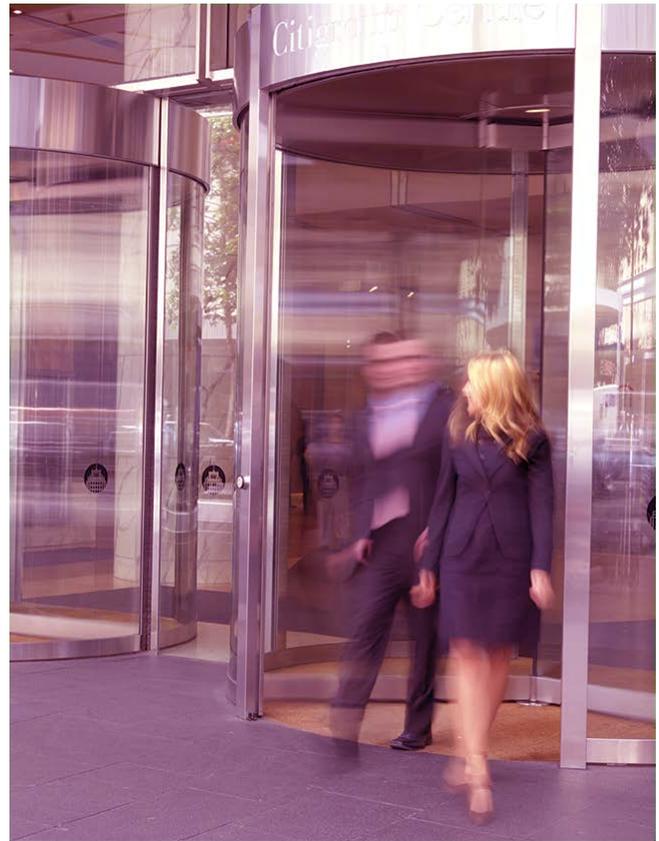
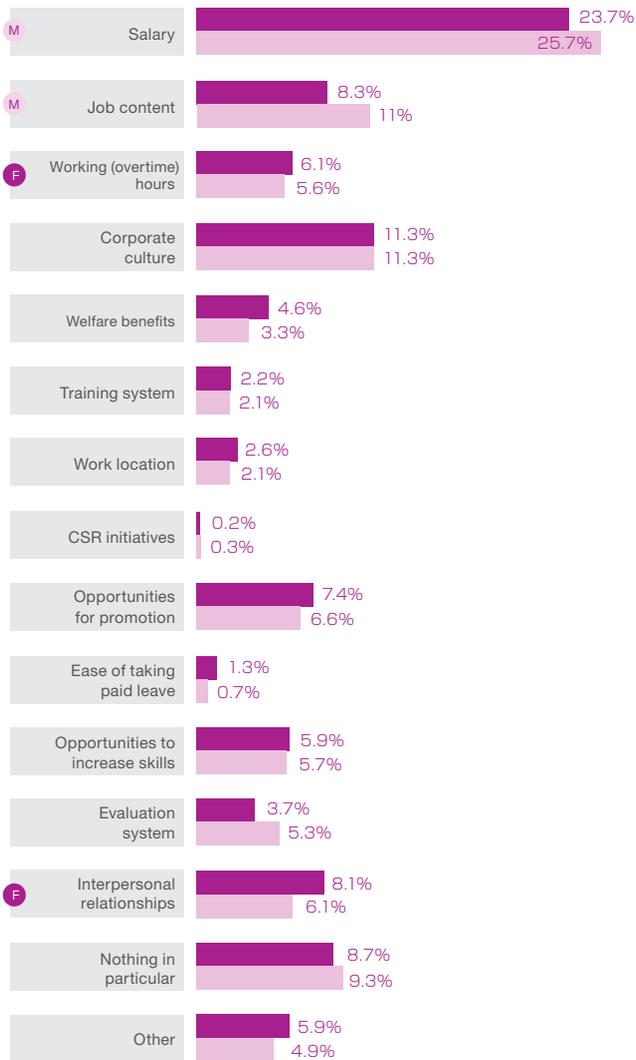


RESPONSES GIVEN UNDER "OTHER":

Medium to long-term business strategy / Transparency of the company / Speed of decision-making processes / Repeated organizational changes / Strengthening compliance / Conversion of dispatched employees to permanent employees / Small office space / Segregation of smoking and non-smoking areas

RESPONSES BY GENDER

■ Female ■ Male



“Salary” and “Job content” were selected by many male and female respondents. A larger number of male respondents gave a high rating to “Salary” and “Job content,” while more female respondents rated factors related to the working environment, including “Interpersonal relationships,” “Ease of taking paid vacation,” and “Working hours.”

It is likely that female respondents rate environments that impose fewer time constraints highly, so that they are able to strike a balance between work and family.

RESPONSES BY INDUSTRY



LOGISTICS

Among respondents working in the logistics industry, a very small number selected “Salary” as the aspect that they rated most highly, despite its overall high ranking among the responses. “Job content” and “Interpersonal relationships” ranked high among the answers given by this group of respondents. On the other hand, an overwhelming number of respondents selected “Salary” as the aspect that they most wish to see an improvement in.



INFORMATION AND COMMUNICATIONS

Despite a high level of satisfaction toward “Job content,” there was evident dissatisfaction toward “Salary.”



MANUFACTURING – OVERALL

Although a high percentage of respondents gave “Salary” a high rating as compared to other industries, the percentage of those who listed “Corporate culture” as an aspect that they most wish to see improvements in tended to be somewhat higher.



31.1%

WITH REGARD TO THE TIMING FOR THEIR NEXT CHANGE OF EMPLOYMENT, THE LARGEST NUMBER OF RESPONDENTS SELECTED "ANY TIME THE OPPORTUNITY ARISES."

CHANGE OF EMPLOYMENT

WHAT ARE THE IMPORTANT DECISIVE FACTORS THAT YOU TAKE INTO CONSIDERATION WHEN CHANGING EMPLOYMENT?

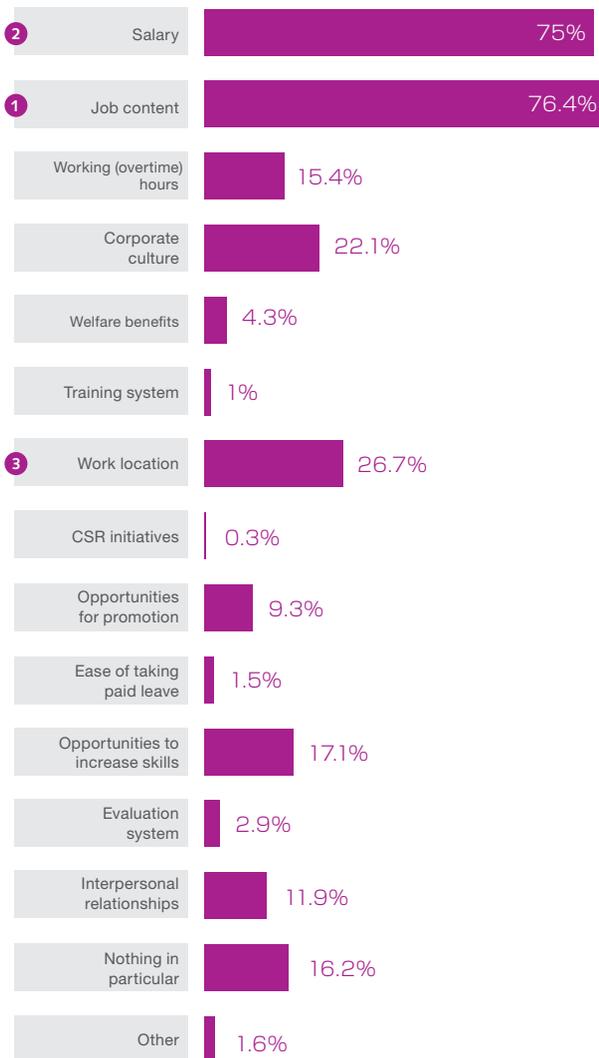
Not surprisingly, the top answers selected by respondents were “Salary” and “Job content.” While many respondents also selected “Work location”, perhaps due to the inconvenience of a long commute, a significant number also indicated “Corporate culture” and “Working hours” as decisive factors that they take into consideration.

Apart from these, there were also calls for promotion and experience as indicated by the responses “Opportunities for career advancement” and “Opportunities to work overseas,” and responses indicating the importance of “Employment as permanent employees” and “Telecommuting systems” as key factors.

Looking at the classification of the responses by gender, male respondents demonstrated a strong preference for “Evaluation system” and “Opportunities for promotion,” while women placed factors such as “Working (overtime) hours,” “Interpersonal relationships,” and “Amount of paid vacation time” in their top ranks. With considerations for striking a balance between work and family, it is likely that their responses are backed by the need for fewer time constraints and understanding from those in their workplace.

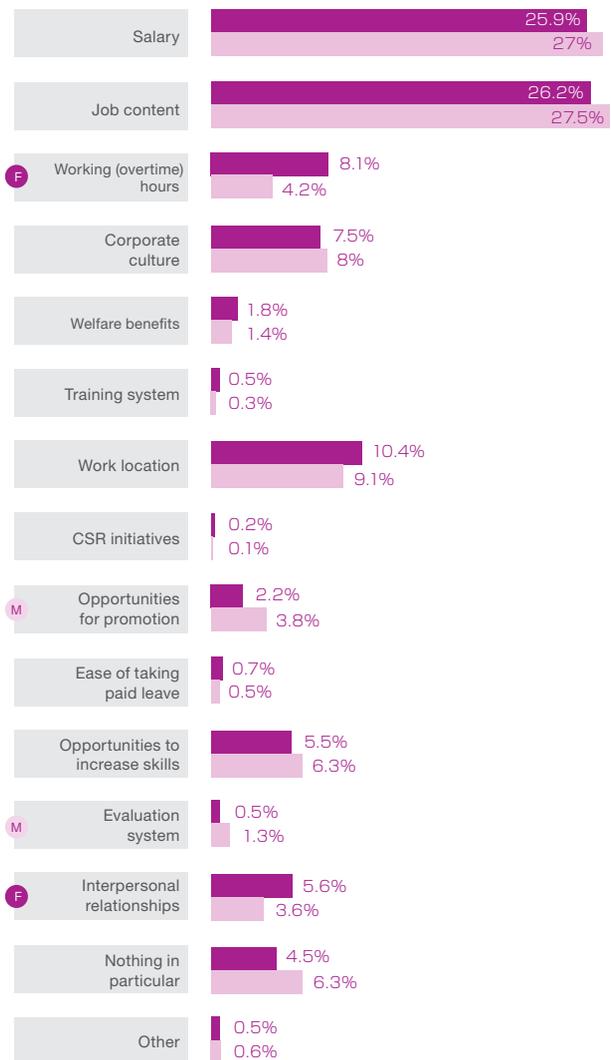


OVERALL



RESPONSES BY GENDER

■ Female ■ Male



RESPONSES GIVEN UNDER “OTHER” :

Opportunities for career advancements / Opportunities to work overseas /
Employment as permanent employees / Telecommuting system

RESPONSES BY AGE

20s

“Enhanced training system” is a decisive factor taken into consideration when changing employment. Among young respondents, there is a clear desire to improve their skills.

EARLY
30s

The early 30s is an age group that comprises a large proportion of mid-career recruitment demand. In addition to “Skill development,” this group of respondents also raised many factors that were not directly related to the job content, such as “Welfare & benefits system,” “Amount of paid vacation time,” and “Working hours.” As this is a period of life when people experience many significant life events, it appears that much importance is also placed on work-life balance.

35 YEARS
AND
ABOVE

It is interesting that respondents of age 35 and above are the only ones who selected “CSR (corporate social responsibility)” as an important item. In addition to their own careers, this group demonstrates an interest in the social position of the company they work for.

23%

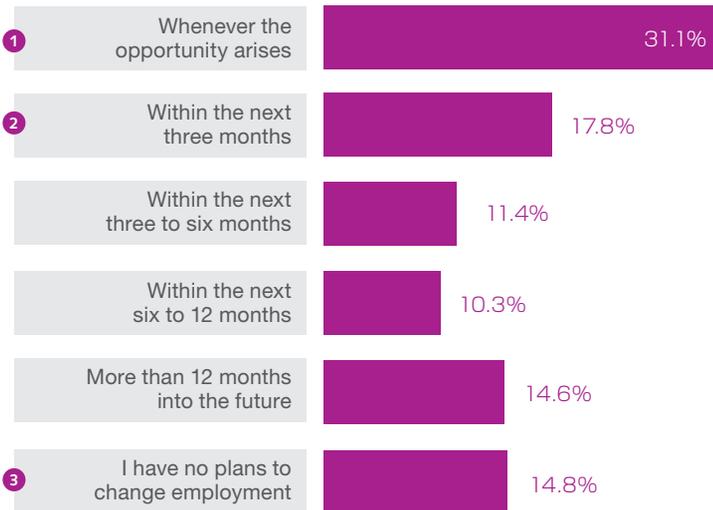
APPROXIMATELY ONE IN FOUR PERSONS IN THE AGE GROUP OF 30 – 34 YEARS, A MAIN AGE RANGE FOR MID CAREER JOB SEEKERS, SELECTED “WORKING HOURS” AS ONE OF THE DECISIVE FACTORS TAKEN INTO CONSIDERATION WHEN CHANGING EMPLOYMENT.



WHEN WILL YOU NEXT CHANGE EMPLOYMENT?

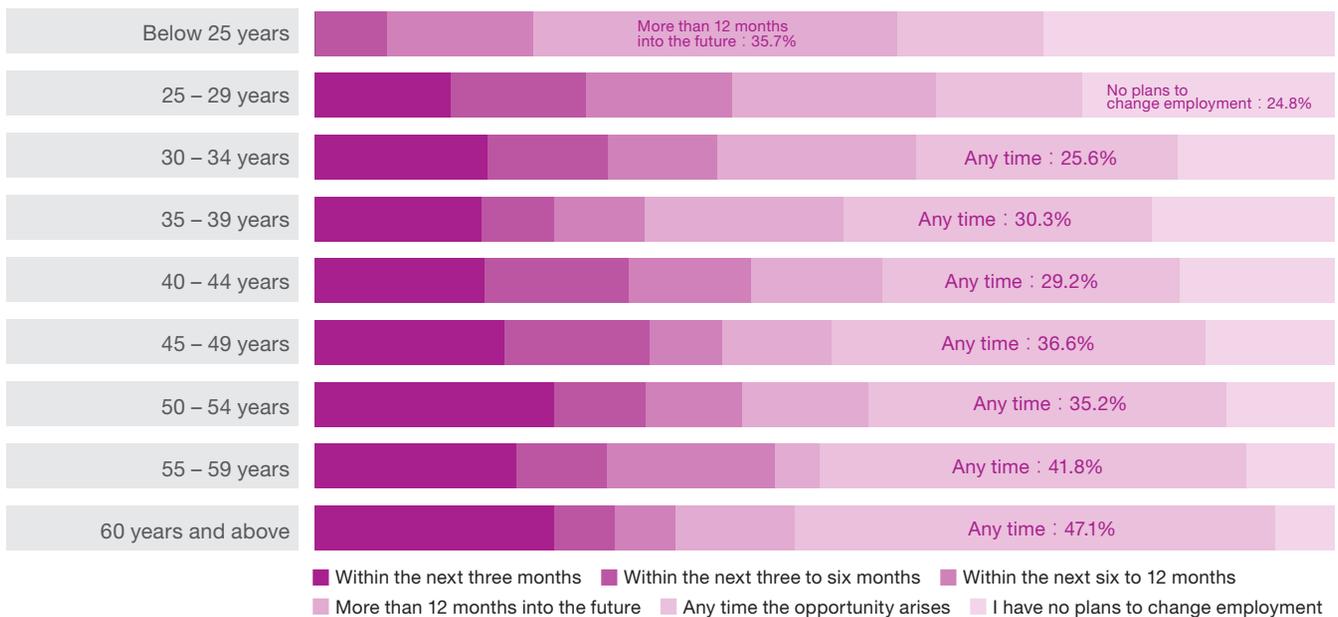
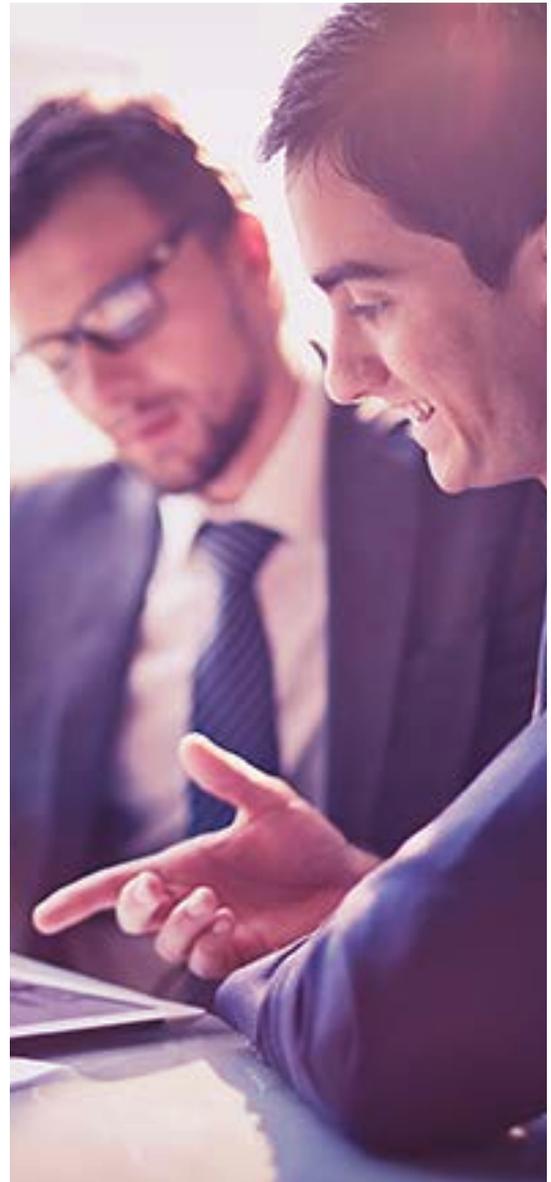
The largest number of respondents selected “Whenever the opportunity arises.” One in three people indicated that they would wish to change employment if a chance arose. This is followed by “Within the next three months” in second place. Unlike responses that are largely dependent on the external factor of chance, we could say that those who selected “Within the next three months” have a strong intention to changing employment. Overall, the percentage of respondents who selected “I have no plans to change employment” made up less than 15%.

OVERALL



RESPONSES BY AGE

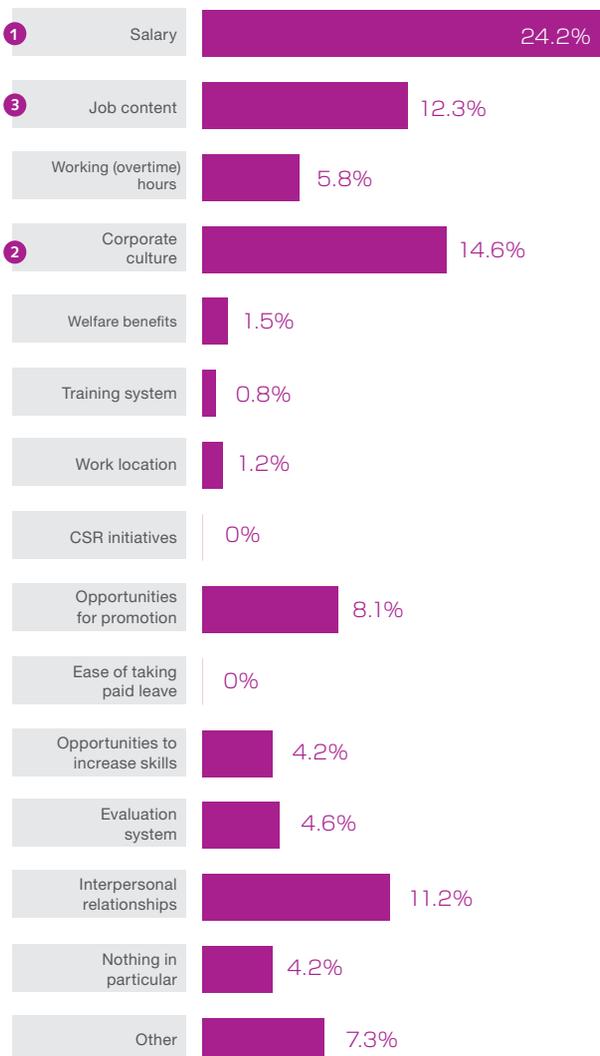
Looking at the responses by the age group of the respondents, there was a significant divergence in the intention to change employment. Intention to change employment is weak among respondents in their 20s. This may be a sign of their belief that this is the period in their career when they should first focus on their jobs at their current companies and become proficient in their line of work. The number of respondents who wish to change employment within the next 12 months increases significantly among those in their 30s, and thereafter, the ratio increases correspondingly with the increase in age.



WHAT ARE THOSE WHO WISH TO CHANGE EMPLOYMENT WITHIN THE NEXT THREE MONTHS DISSATISFIED WITH?

While it was not surprising that “Salary” and “Job content,” which are the key decisive factors taken into consideration when changing employment, took the top positions as the aspects that these respondents were dissatisfied with, “Corporate culture” ranked in second place. Although little attention is paid to “Corporate culture” when looking for a new job, we could say that it is a significant factor that can trigger employees to consider a change of employment. A large number of respondents also selected “Interpersonal relationships,” and it appears that apart from work-related factors, “Internal environment” within the company is also a factor encouraging employees to change employment.

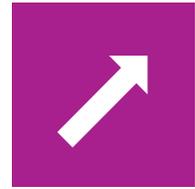
OVERALL



WHEN YOU LAST CHANGED EMPLOYMENT, BY HOW MUCH DID YOUR SALARY RISE?

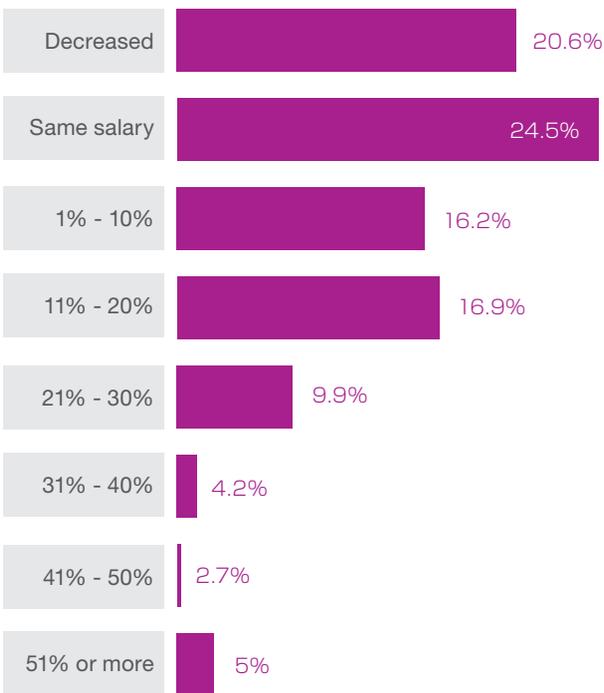
As illustrated also by the fact that “Salary” was selected as an important item taken into consideration when changing employment, more than half (55%) of the total number of respondents received some degree of salary increase when they most recently changed employment. However, the proportion of those who received the same salary was as high as one in every four respondents, while 20% responded that their salaries had decreased. This may be the result of those who had selected “Job content” as the most important factor when changing employment.

Looking at the company type of those who answered that their salaries had decreased, we found that many respondents work in Japanese-owned companies. There was also a tendency among those who answered that they received the same salary to be working in Japanese-owned companies.



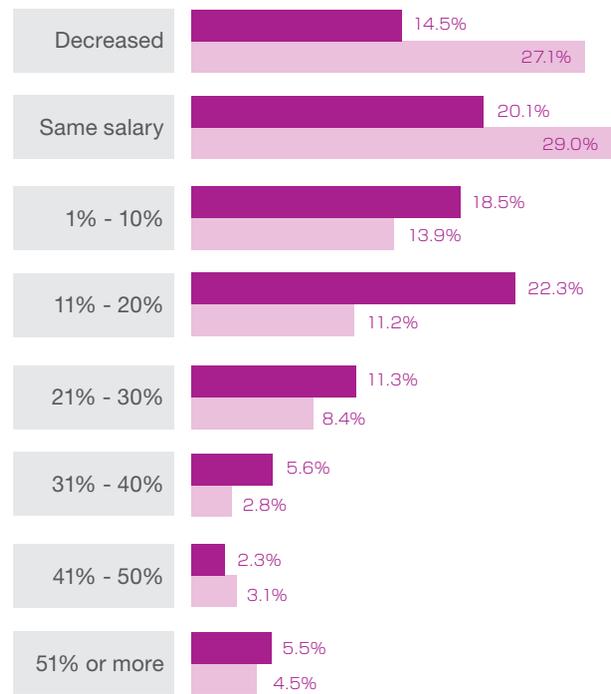
INCREASED
54.9%

OVERALL



RESPONSES BY JAPANESE-OWNED COMPANIES/ FOREIGN-OWNED COMPANIES

■ Foreign-owned companies ■ Japanese-owned companies

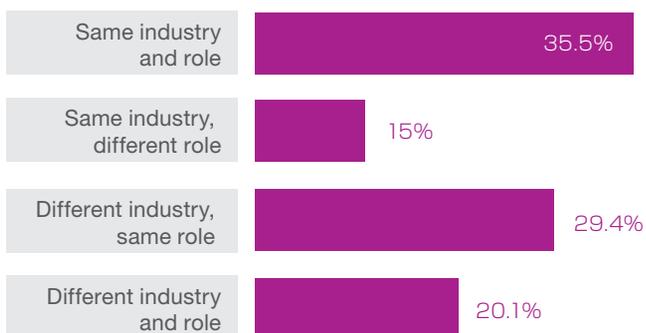


DID YOU REMAIN IN THE SAME INDUSTRY/ROLE AFTER YOUR CHANGE OF EMPLOYMENT?

With regard to industry and role, the majority of respondents did not change their role after changing employment.

As we may expect, this is likely because a primary desire when changing employment is often to maximize the skills that one already has in order to draw out advantageous terms and gain an increase in salary.

OVERALL

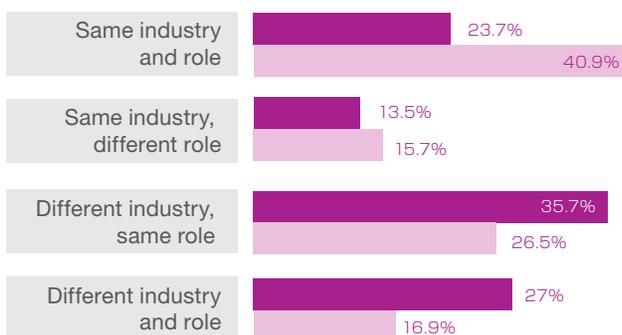


RESPONSES BY GENDER

■ Female ■ Male

Among the male respondents, an overwhelming proportion remained in the same industry and role. This was followed by those who entered a different industry and remained in the same role. A significant majority changed employment while remaining in the same role. It could be said that there is a tendency to take maximum advantage of existing skills when changing employment.

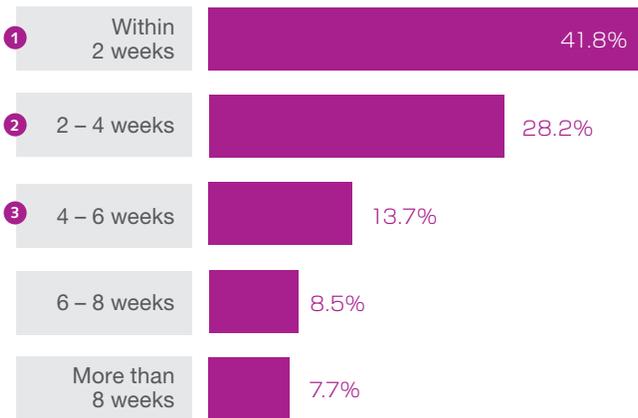
Meanwhile among women, a large number of respondents changed industries while remaining in the same role. Despite the tendency to change employment while utilizing one's professional skills, the second largest number of respondents entered different industries and different roles, demonstrating a stronger tendency toward changing to a completely different job. It is possible that they may enter a completely different industry and role in cases where they prioritize certain workplace conditions, such as "Working (overtime) hours," "Interpersonal relationships," and "Amount of paid vacation time."



WHEN YOU JOINED YOUR CURRENT COMPANY, WHAT WAS THE LENGTH OF TIME BETWEEN YOUR FIRST INTERVIEW AND RECEIVING OF AN OFFER OF EMPLOYMENT?

More than 40% of companies conduct interviews and issue offer of employment within two weeks, while approximately 70% decide on whether or not to employ a mid-career recruit within one month.

OVERALL



RESPONSES BY INDUSTRY



LOGISTICS

It appears that the recruitment process is relatively fast in the logistics industry, and companies that take more than 8 weeks are in the minority.



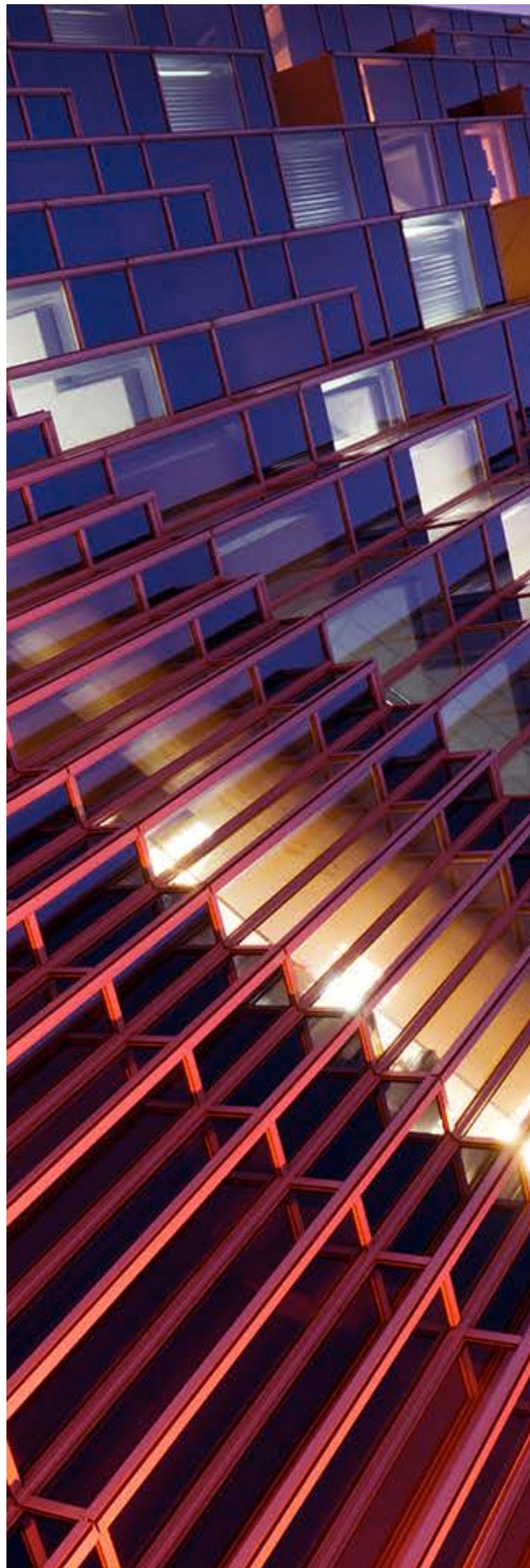
MANUFACTURING - IN PARTICULAR, CHEMICALS - RELATED COMPANIES

There is evidently a cautious attitude, and this industry has the largest number of companies that take more than 8 weeks to complete the recruitment process.



FINANCIAL INSTITUTIONS

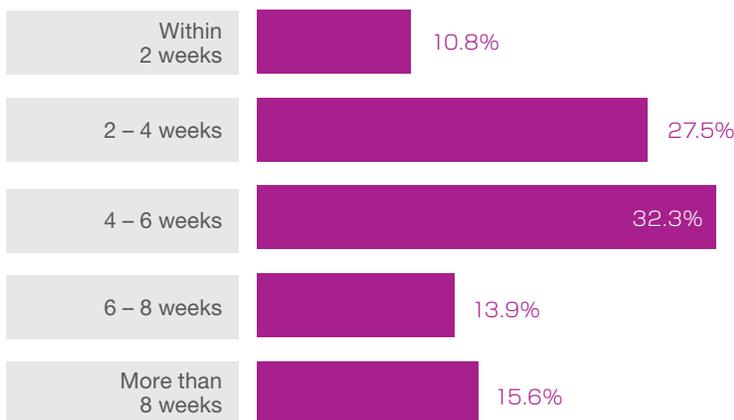
There is a trend for the recruitment process to take longer than average.



ABOUT HOW LONG WOULD IT TAKE BEFORE RECEIVING AN OFFER FOR YOU TO LOSE INTEREST IN JOINING THE COMPANY?

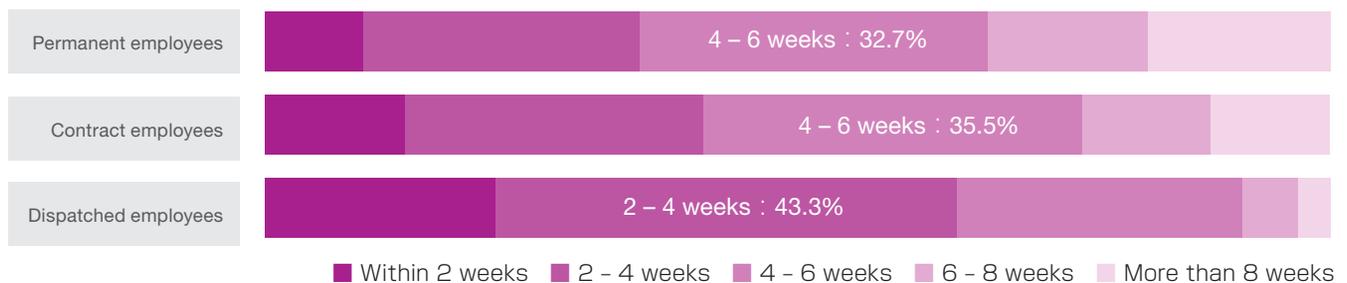
In response to the question about the period leading up to the receipt of an offer of employment, the largest number of respondents indicated that desire to join the company would decline between 4 – 6 weeks. This was followed by a high probability that desire to join the company would decline within 2 – 4 weeks. Combining with respondents who selected “4 – 6 weeks,” this made up as much as 60% of all the respondents. If there are good candidates, there is clearly a need to issue a notification of an offer of employment as quickly as possible. Approximately 10% of the respondents also indicated that desire to join the company would decline even if the recruitment process took less than 2 weeks to complete.

OVERALL



RESPONSES BY EMPLOYMENT STATUS

Results on the relationship between desire to join a company and the time taken until an offer of employment is made show significant differences based on employment status. Permanent employees are observed to adopt an attitude of waiting longer for an offer of employment, possibly because they understand that companies take a more cautious attitude toward hiring permanent employees. However, in the case of dispatched employees, more than 20% of the respondents answered that desire to join the company would decline within two weeks.

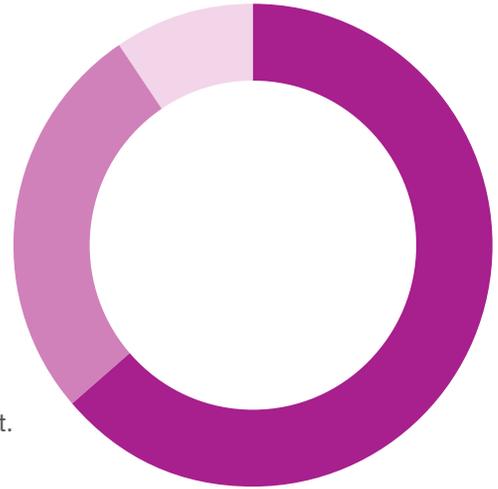


HAVE YOU EVER BEEN PRESENTED WITH A COUNTER-OFFER?

When an employee submits a notification of resignation to the company that he or she is employed in, and the company offers conditions to retain that employee, this is known as a "Counter-offer." According to the results, approximately one in three respondents has been presented with a counter-offer.

36.3%
ONE IN THREE RESPONDENTS HAS BEEN PRESENTED WITH A COUNTER-OFFER.

- Never been presented with a counter-offer. 63.7%
- Presented with a counter-offer but rejected it. 27%
- Presented with a counter-offer and accepted it. 9.3%



RESPONSES BY INDUSTRY



SERVICE

A large proportion of respondents indicated that they had been presented with a counter-offer, and had either accepted or rejected it. This suggests that the industry is putting effort into retaining its talent amidst a shortage of labor. However, the actual situation is that the probability of an employee deciding to remain in the job based on the counter-offer is low.



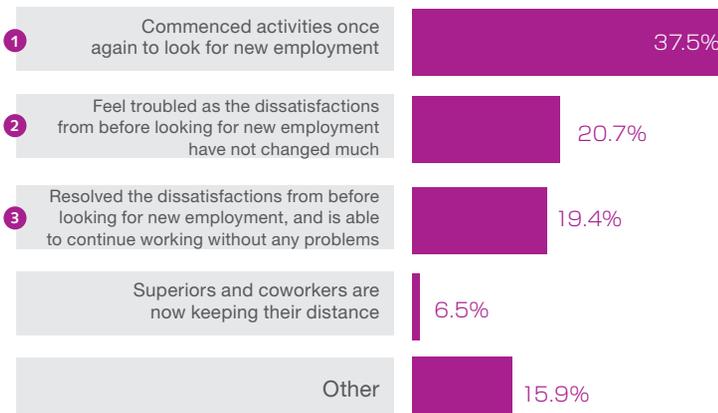
CHEMICALS-RELATED COMPANIES

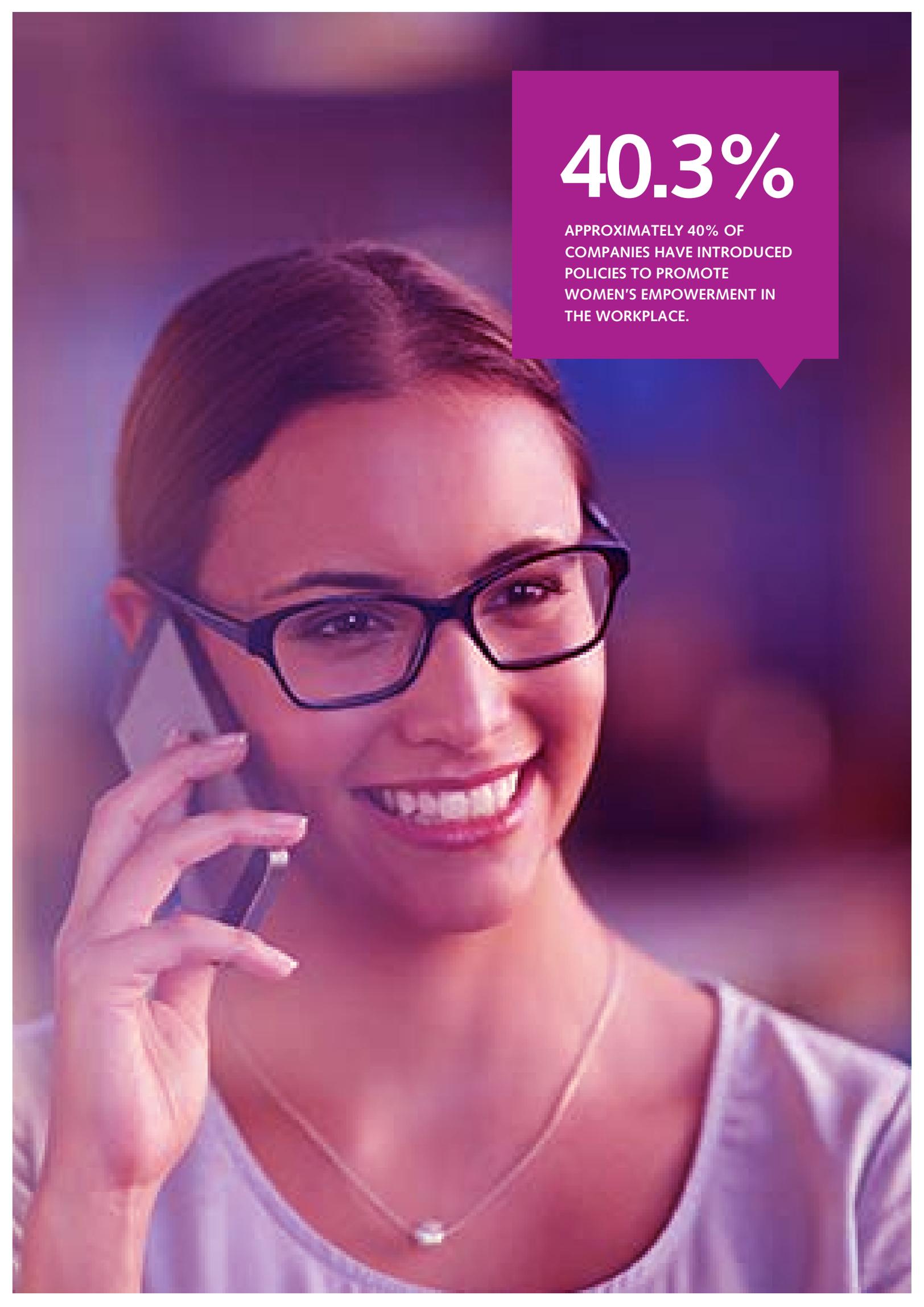
Interestingly, just like the Logistics/Transportation industry, which is one of the industries with the fastest recruitment processes, the Chemicals industry, which takes the longest time in its recruitment process, had a low percentage of respondents who have been presented with counter-offers. This was an unexpected result, demonstrating that the industry that spends the most time recruiting talent does not do much to retain them.

HOW DID THE SITUATION CHANGE AFTER YOU ACCEPTED THE OFFER?

Among those who decided to remain in employment after being presented with a counter-offer, the reality is that only 20% were able to resolve their dissatisfactions with their current job and continue working without any problems. Almost 40% of the respondents who had accepted a counter-offer eventually commenced activities once again to look for new employment.

Among those who responded "Other," there were those who expressed that they were in a difficult position as their coworkers and subordinates had also started to look for employment elsewhere, while others stated that organizational restructuring has made things no better than they were before.



A close-up photograph of a young woman with dark hair pulled back, wearing black-rimmed glasses and a light-colored top. She is smiling broadly and holding a dark smartphone to her ear with her right hand. The background is a soft, out-of-focus blue and purple gradient.

40.3%

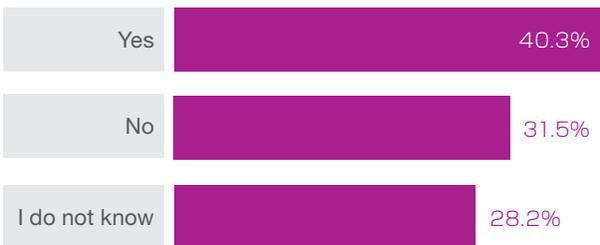
APPROXIMATELY 40% OF
COMPANIES HAVE INTRODUCED
POLICIES TO PROMOTE
WOMEN'S EMPOWERMENT IN
THE WORKPLACE.

WOMEN'S EMPOWERMENT

ARE THERE ANY POLICIES IN PLACE TO PROMOTE WOMEN'S EMPOWERMENT IN THE WORKPLACE?

Since the enforcement of the Act of Promotion of Women's Participation and Advancement in the Workplace in April 2016, large corporations have been required to formulate and submit action plans for female empowerment. Similarly, small and medium-sized companies have also been required to put effort into doing the same. Aided in part by this movement, it is clear that the number of companies that have introduced policies to promote the advancement of women is on the rise. As many as approximately 40% of the respondents selected "Yes".

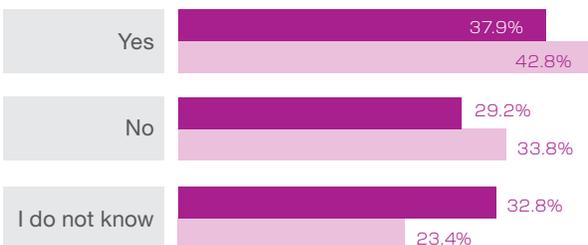
OVERALL



RESPONSES BY JAPANESE-OWNED COMPANIES/ FOREIGN-OWNED COMPANIES

■ Foreign-owned companies ■ Japanese-owned companies

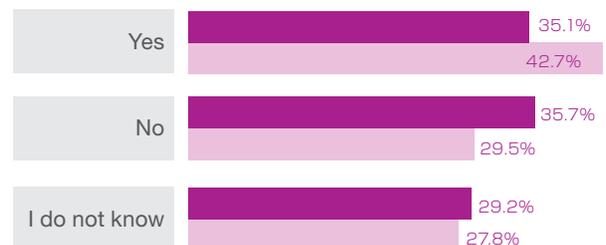
Many of the respondents who answered "Yes" work in Japanese-owned companies. Among those working in foreign-owned companies, the number of "Yes" responses was followed by "I do not know" at more than 30%. However, among those who answered "No," there were many who felt that as there had already been complete gender equality within the company to begin with, no special policies focusing on women had been put in place. Hence, in companies that have originally had a corporate culture of gender equality, it is possible that such a culture may have contributed to a low level of interest toward policies promoting women's empowerment.



RESPONSES BY GENDER

■ Female ■ Male

The results showed that there were fewer women who answered "Yes" in response to the question on whether female empowerment policies were in place. While the differences in the companies that each respondent works in can of course be a cause for this, it is also possible that the policies that have been put in place are not effective enough for the women, who are the concerned parties, to feel that there are in fact policies in place.



RESPONSES BY INDUSTRY



FINANCE/INSURANCE/ SERVICE (HOSPITALITY)

While the number of respondents who selected "I do not know" tended to be on the high side, when compared to other industry responses to "Percentage of women at the workplace (page 23)," it appears that there are a larger number of women at the workplace.



SERVICE (OTHER)/RETAIL, WHOLESALE/ MANUFACTURING (AUTOMOBILES/PARTS)

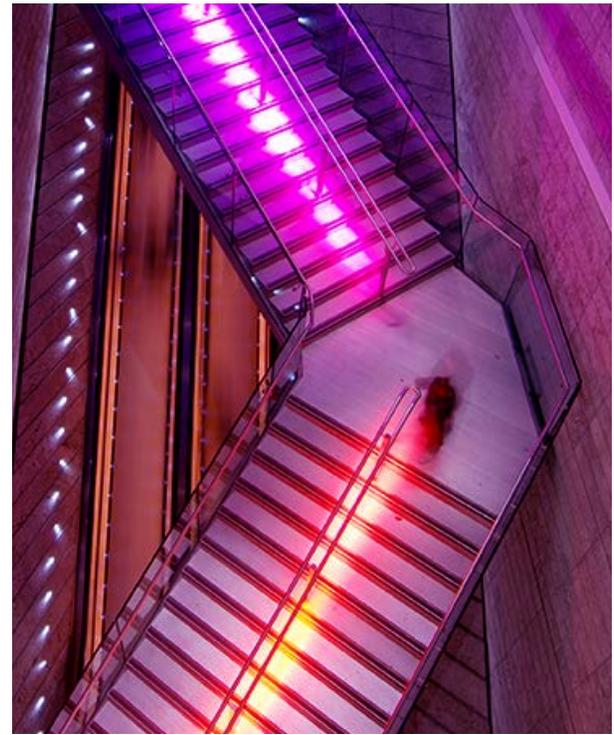
On the other hand, there were few respondents who selected "Yes" in the Service (Other), Retail/Wholesale, and Manufacturing (Automobile/Parts) industries.



ARE THE POLICIES ADEQUATE?

Despite an increase in the number of companies that have introduced policies promoting women's empowerment in the workplace, the largest number of respondents selected "Not adequate" (37.5%) in the survey.

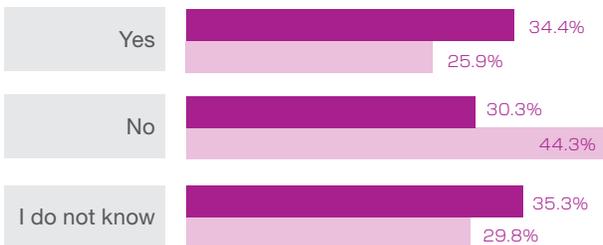
OVERALL



RESPONSES BY JAPANESE-OWNED COMPANIES/ FOREIGN-OWNED COMPANIES

■ Foreign-owned companies ■ Japanese-owned companies

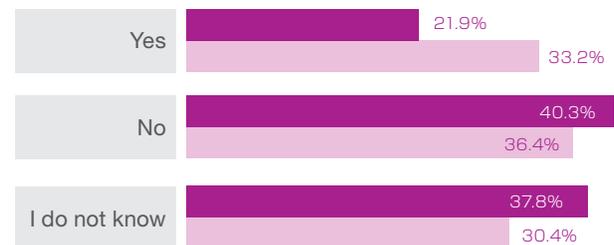
According to the results of the survey, while a large percentage of respondents from Japanese-owned companies answered "Yes" to the question on whether there are any policies in place to promote women's empowerment, the number of respondents who selected "Yes" to the question on whether such policies were adequate was fewer than those who answered "Yes" for foreign-owned companies. In addition, the fact that the number of "No" responses far exceeded the number of "I do not know" responses also clearly suggested that the policies were felt to be inadequate.



RESPONSES BY GENDER

■ Female ■ Male

The small number of female respondents, who are actually the concerned parties, among those who selected "Yes," suggests a need for stronger and more effective policies.



RESPONSES BY INDUSTRY



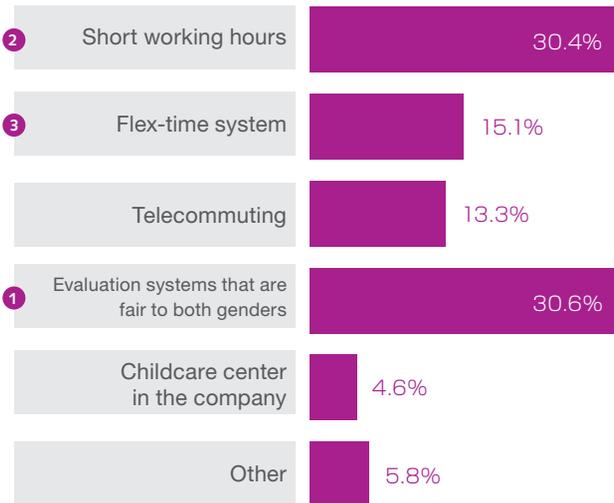
SERVICE (HOSPITALITY) / MANUFACTURING (AUTOMOBILE/PARTS)

An overwhelming percentage of respondents who answered that the policies were inadequate came from the service industry (Accommodations/Food and Beverage) and the Manufacturing industry (Automobile/Parts). In the Manufacturing industry (Automobile/Parts), there were originally few respondents who indicated that there are policies in place to promote women's empowerment. In light of this, we could say that there is a need to put in place more policies to promote women's empowerment at the workplace.

WHAT TYPE OF POLICIES ARE WELL RECEIVED?

Overall, the most well-received policies were “Evaluation systems that are fair to both genders” and “Short working hours,” both of which received about the same number of responses. These were followed by “Flex-time systems” and “Telecommuting.” There were less respondents who selected “Childcare center in the company,” which should provide the advantage of allowing employees to leave their children in a place that is easily accessible to them. One of the possible reasons for this may be the fact that few companies actually offer such a benefit.

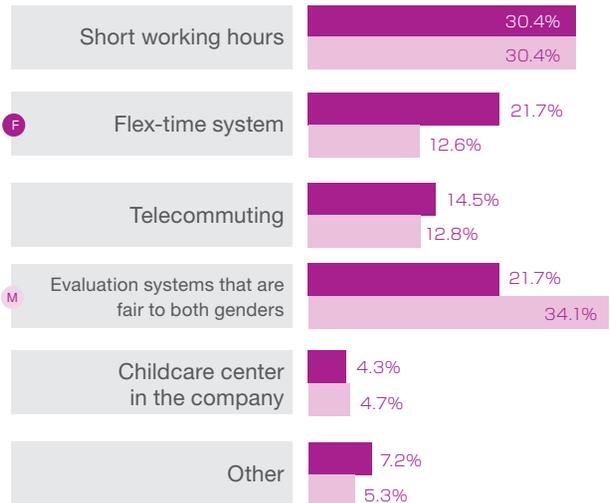
OVERALL



RESPONSES BY GENDER

■ Female ■ Male

Among male respondents, a large proportion selected “Evaluation systems that are fair to both genders.” However, among female respondents, who face a bottleneck in terms of time constraints due to the need to strike a balance between work and childcare duties, a large proportion selected “Short working hours” and “Flex-time system.” Compared to the Evaluation system, the tendency was for female respondents to give a higher rating to policies that actually remove such time constraints for them.



RESPONSES GIVEN UNDER “OTHER” :

Long maternity leave / Fixed quota of male and female employees / Little overtime work / Has policies in place to prevent discrimination

RESPONSES BY INDUSTRY



SERVICE (ACCOMMODATIONS/ FOOD AND BEVERAGE)

Overall, many respondents selected “Shorter working hours” and “Evaluation systems that are fair to both genders.” However, “Flex-time system” also occupied a significant proportion of the responses in the Service (hospitality) industry.



MANUFACTURING (AUTOMOBILE/PARTS, PHARMACEUTICALS/MEDICAL EQUIPMENT)

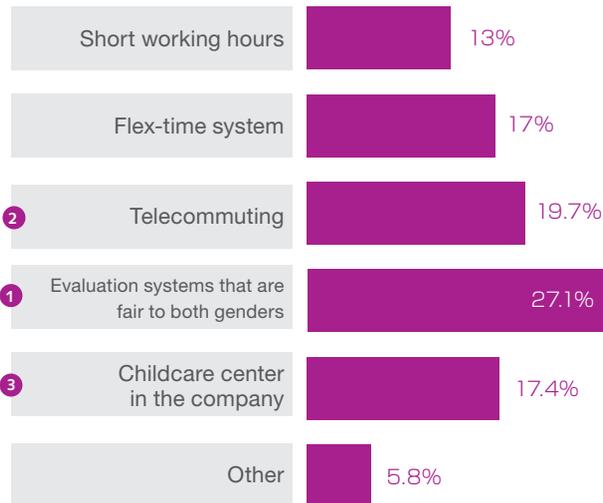
In the Manufacturing industry (Automobile/Parts and Pharmaceuticals/Medical Equipment), there were relatively few respondents who selected “Short working hours” as a well-received policy. However, there is a probability that this is due to a percentage of the companies already having implemented this system to begin with.



WHAT TYPES OF POLICY WOULD BE GOOD TO HAVE?

The policy that most respondents wished to have in place was “Evaluation systems that are fair to both genders” this made up close to 30% of all responses. This was followed by “Telecommuting” and “Flex-time system.” Those who wished to have “Childcare centers in the company” also reached close to 20% of the total.

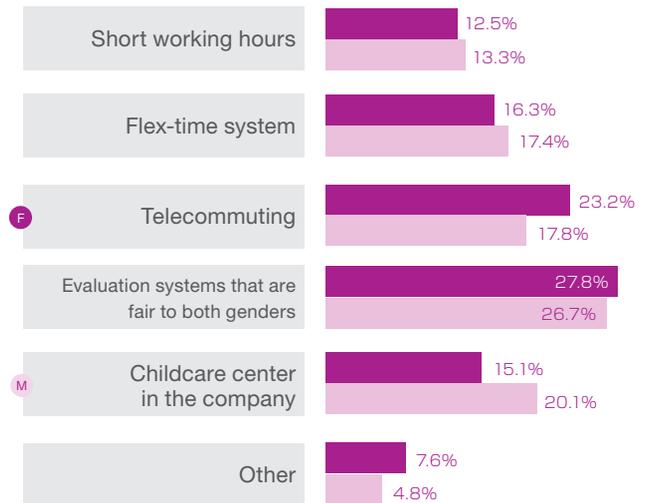
OVERALL



RESPONSES BY GENDER

■ Female ■ Male

Among both male and female respondents, “Evaluation systems that are fair to both genders” took the top place as the policy that is most desirable to have. Among male respondents, this was followed by “Childcare centers in the company” in second place. However, in actual fact, this option ranked low among responses by the female respondents, possibly because of the fact that it would be difficult to commute to work with children on crowded trains. On the other hand, “Telecommuting” took second place among female respondents as the next most desirable policy to have.



RESPONSES GIVEN UNDER “OTHER” :

Extension of maternity/childcare leave / Follow-up on returning to the workplace after maternity leave / Systems that appraise short working hours positively / Childcare leave for men / Awareness reform for men

RESPONSES BY INDUSTRY



Evaluation systems that are fair to both genders
→High percentage in the Manufacturing industry overall



Short working hours
→High percentage in the Service industry

Once again, variations were observed between the respective industries. The demand for “Evaluation systems that are fair to both genders” tended to be high in the Manufacturing industry overall, and in particular in Chemicals companies within the Manufacturing industry. On the other hand, there were fewer respondents selecting this option in the Information and Communications, Retail/Wholesale, and Service (hospitality) industries.

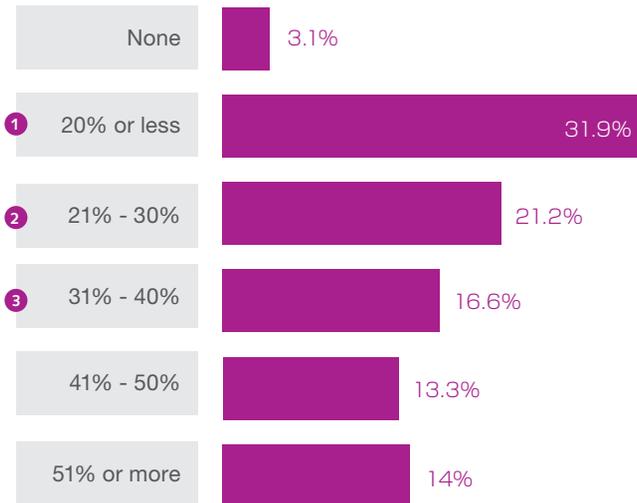
However, in the Service industry (hospitality), an overwhelming number of respondents (more than 40%) called for “Short working hours.”



WHAT IS THE PROPORTION OF WOMEN IN THE WORKPLACE?

Although policies to promote women's empowerment have been introduced in approximately 40% of the companies that respondents worked in, approximately 30% of all respondents indicated that 20% or less of the employees at their workplaces were women. Close to 30% of all respondents selected "41 – 50%" and "51% or more," indicating that women make up approximately half of the employees at their workplaces.

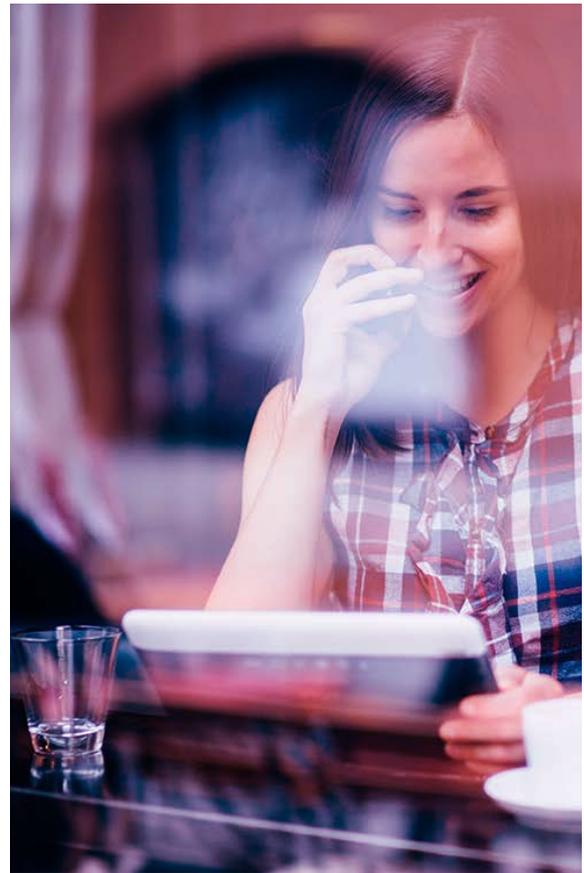
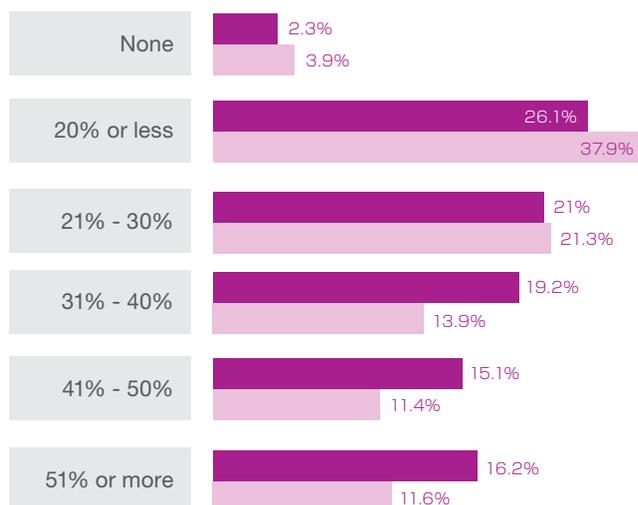
OVERALL



RESPONSES BY JAPANESE-OWNED COMPANIES/ FOREIGN-OWNED COMPANIES

■ Foreign-owned companies ■ Japanese-owned companies

"20% or less" made up a large proportion of the responses for both foreign-owned and Japanese-owned companies. However, as compared to Japanese-owned companies, a larger number of foreign-owned companies had 31% or more female employees.



RESPONSES BY INDUSTRY



MANUFACTURING (AUTOMOBILES/PARTS)

6.7% of all respondents selected "None," while 57.5% selected "20% or less." These answers indicate that the proportion of women at the workplace is significantly low. One of the reasons could be that there are few women with a science-related background and the proportion of female employees in the Manufacturing industry overall tends to be low.



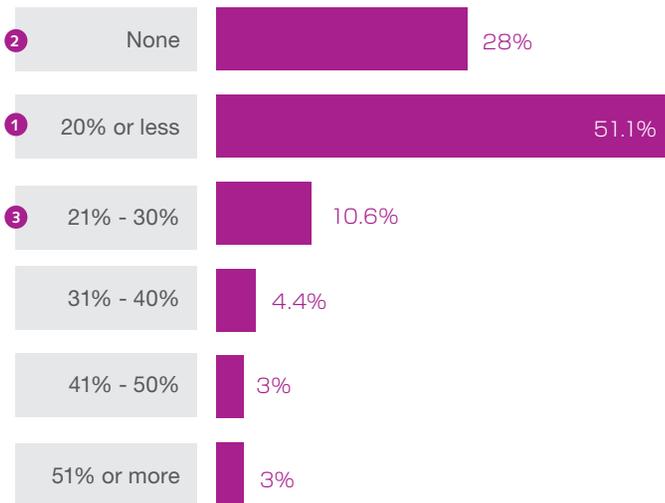
SERVICE (OVERALL)

In the service industry overall, many respondents answered that the percentage of female employees was "51% or more." The number of responses was the largest in the Service industry as well as in the Retail/Wholesale industry and the Logistics/Transportation industry. According to the survey results, the percentage of female employees also tended to be higher in the Finance/Insurance industry.

WHAT IS THE PROPORTION OF FEMALE MANAGERS IN THE WORKPLACE?

The largest proportion of respondents (approximately 50%) selected “20% or less,” followed by close to 30% of respondents selecting “None.” Only 3% of all respondents indicated that female managers made up more than half of all managers in their company with the response “51% or more.”

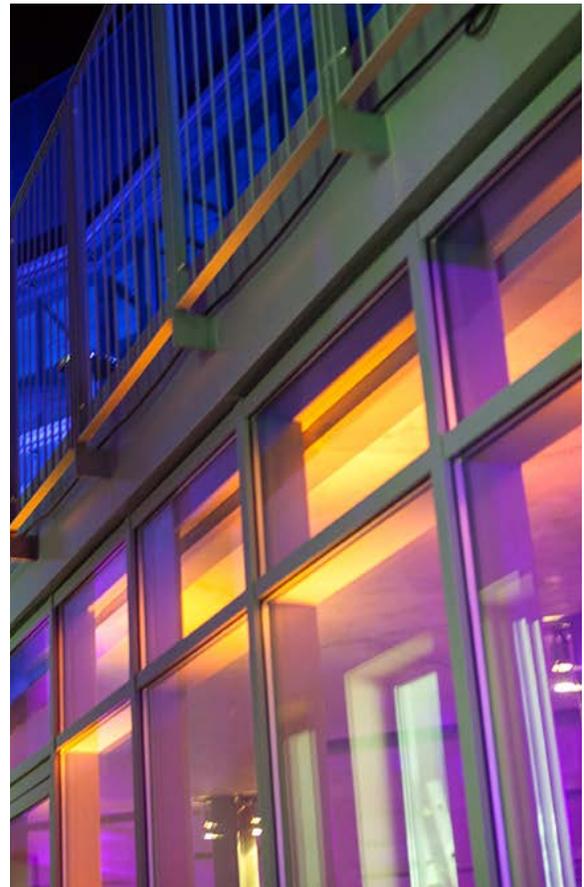
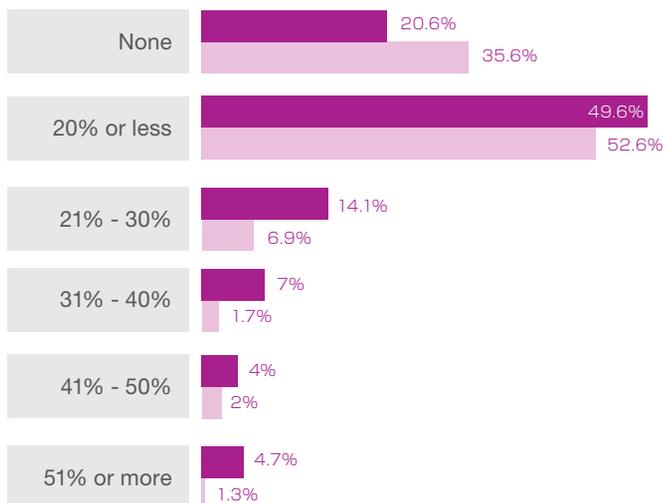
OVERALL



RESPONSES BY JAPANESE-OWNED COMPANIES/ FOREIGN-OWNED COMPANIES

■ Foreign-owned companies ■ Japanese-owned companies

Looking at the results by type of company, the proportion of female managers tended to be high among foreign-owned companies, which originally had a higher percentage of female employees. However, even among such foreign-owned companies, only about 30% of the respondents indicated that the percentage of female managers was 21% or higher.



RESPONSES BY INDUSTRY



SERVICE (HOSPITALITY)

In the Service Industry (Hospitality), which originally has a large number of female employees, the percentage of female managers was unsurprisingly high. Approximately 10% of the respondents selected “None,” while more than 40% selected “21% or more.”



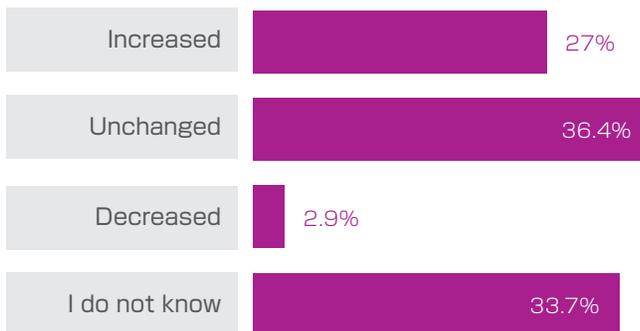
MANUFACTURING (AUTOMOBILE/PARTS)

On the other hand, the low percentage of female employees in the Manufacturing industry overall tends to be directly related to the percentage of female managers. Hence, in the Manufacturing industry (Automobile/Parts), the percentage of “None” responses reached 45.0%, while the percentage of “31% or more” responses was close to zero.

HAS THE PROPORTION OF FEMALE COWORKERS/MANAGERS CHANGED IN THE PAST FIVE YEARS?

27.0% of responses indicated that the proportion has increased, while 2.9% of responses indicated that the proportion has decreased, marking a significant gap between the two. The reality is that it is very difficult to accurately capture the number of female coworkers and managers working in an office; hence, approximately one-third of the answers were "I do not know," while the largest proportion of respondents selected "Unchanged" (36.4%).

OVERALL



RESPONSES BY INDUSTRY



MANUFACTURING

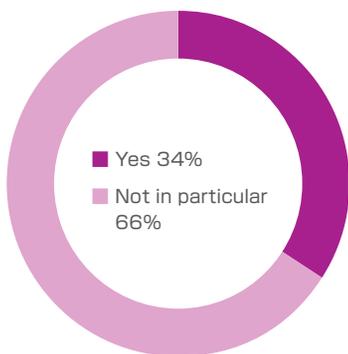
The general trend remains largely the same among all industries. However, in the overall Manufacturing industry, which originally had a low percentage of female employees, the number of respondents selecting "Increased" tended to be higher. The percentage of respondents selecting "Increased" exceeded 30% in the Manufacturing industry (Chemicals, Pharmaceuticals/Medical Equipment) and the Information and Communications industry.



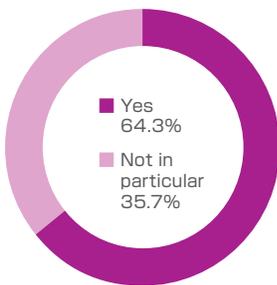
ARE POLICIES TO PROMOTE WOMEN'S EMPOWERMENT IN THE COMPANY A DECISIVE FACTOR IN DETERMINING WHICH COMPANY TO MOVE TO?

Views were divided among male and female respondents. Among males, approximately 80% indicated that such policies were not particularly a decisive factor in determining which company to move to; among female respondents, who are the concerned parties, more than 60% indicated that they were a decisive factor. However, it should be highlighted that even among male respondents, the percentage who answered "Yes" reached 20%. The reason for this is that in workplaces that have introduced policies to promote women's empowerment, improvements in the working environment can often be seen in the form of a reduction in the number of overtime hours and a higher rate of paid vacation used.

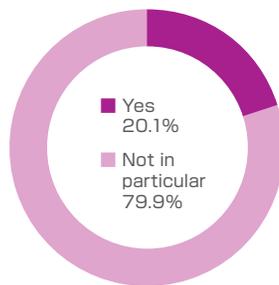
OVERALL



RESPONSES BY GENDER



Female



Male

RESPONSES BY INDUSTRY



SERVICE

In the Service industry, which has a high ratio of female employees, there were a correspondingly high percentage of "Yes" responses. The largest percentage was 41.7% in the Hospitality sector.



MANUFACTURING

On the other hand, the percentage of "Yes" responses was low in the Manufacturing industry (Chemicals, Pharmaceuticals/Medical Equipment).

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