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Women @ Work
A global outlook

Japan Findings



Global summary

- Responsibilities at work and at home have exponentially increased since the onset of the COVID-19 pandemic and **the burden is disproportionately impacting women**. Many are at a breaking point, leaving the workforce in record numbers. Yet businesses that give women the support they need to succeed have a more productive, motivated workforce – and are likely to report greater retention. Our research uncovers the **characteristics of organizations who are making tangible progress on gender equality** and steps employers can take to do the same.
- The following deck examines how women in Japan stand out from their global counterparts on key themes. We surveyed **500 women** in Japan and evaluated responses through the intersectional lenses of race and ethnicity, sexual orientation, and gender identity.

KEY GLOBAL FINDINGS

The pandemic has negatively impacted women at work.



Today, less than half of women **rate their job satisfaction, motivation and productivity as “good,”** compared with around 3 in 4 before the pandemic.



Almost a quarter (23%) say they are **considering leaving, or are likely to leave, the workforce altogether** as a result of the impact of COVID-19.

Workplace culture has not been supportive during this time.

Just **39%** of women believe their organization’s commitment to supporting women during the pandemic has been sufficient. Less than a quarter of women (**22%**) say their employers have enabled them to create clear boundaries between work and personal hours while **63%** of women feel that their employers evaluate them based on the amount of time spent online rather than quality of output. Over half (**52%**) have experienced non-inclusive behaviors over the past 12 months and approximately **one-quarter** of women did not report these incidents because they were concerned about negative impacts to their careers.

Most employers can be doing more to help.

We identified a group of women who agree with the following three statements, indicating an inclusive, high-trust culture where women are valued and supported. We call this subset of organizations **“gender equality leaders”** (4% of the global sample) and organizations which did not meet any of these three criteria **“lagging organizations”** (31% of the global sample”).



I feel **confident to report non-inclusive behaviors**, without concern for reprisal



I feel supported by my employer to **balance work with other commitments**



My **career is progressing** as quickly as I would like currently

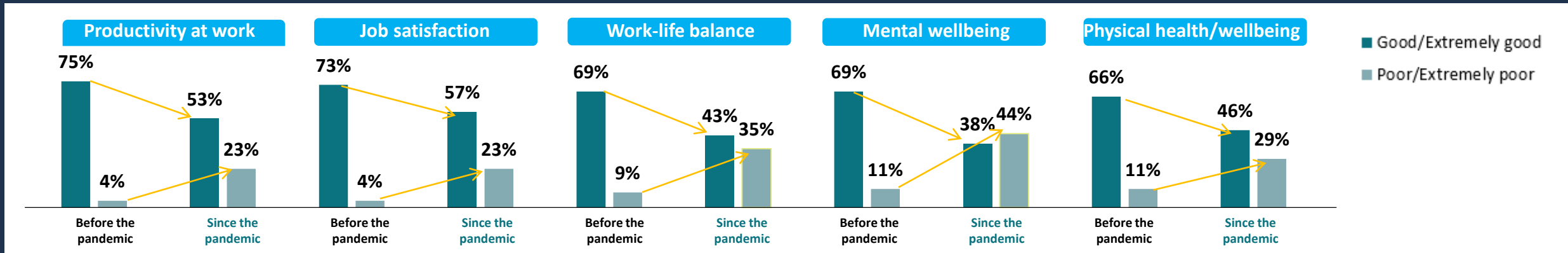
Japan Summary (1)

- "Japan Summary (1)" on this page and "Japan Summary (2)" on the next page summarize the trends in Japan from the responses of 500 women working in Japan out of 5,000 women in 10 countries surveyed and the outstanding differences compared with the global average.
- In Japan, as in the world, the burden on women at work and at home has increased dramatically due to the influence of COVID-19. In addition to a significant decline in job satisfaction and wellbeing among working women, a lack of work-life balance is the most crucial reason for considering retirement.

KEY JAPAN FINDINGS

- The pandemic has had a negative impact on working women's job satisfaction and well-being.

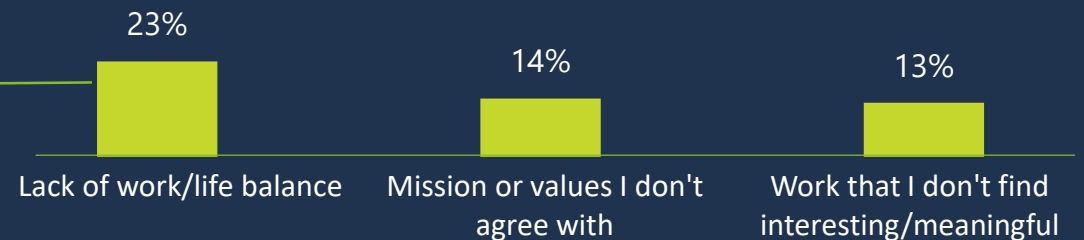
Of the 500 working women in Japan, 71% said their workload had increased since the pandemic, **reducing their work productivity and satisfaction**. In addition, while the burden of household chores and nursing care has increased in the home, the quality of communication has declined due to a decline in connections with others, and the time spent enjoying hobbies has also decreased, resulting in a deterioration in work-life balance and well-being.



- Decreased work-life balance has a major impact on **considering resignation**. **57% of Japanese women are considering "resigning within two years"** -while 20% are considering resignation after 2-5 years. Only 3% plan to work for more than 5 years.

Reasons why working women in Japan are considering resignation within two years (Top 3 of all selected)

The biggest reason for considering resignation is the "lack of work-life balance" (23%) which requires an organizational improvement by the organization.



Japan Summary (2)

- 23% of working women surveyed in Japan have considered leaving the workforce altogether during pandemic, due to the impact of increasing or decreasing working hours (or a related compensation) -rather than balancing work and childcare.
- Only 4% has answered that they were working in an inclusive and credible culture in which they felt “properly supported“. Most organizations in Japan do not have the enough support that women really need, and it shows that the situation can be improved to achieve a true accommodating environment by reviewing their support details.

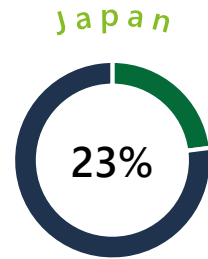
KEY JAPAN FINDINGS

➤ **23% considering to leave the workforce altogether during the pandemic.**

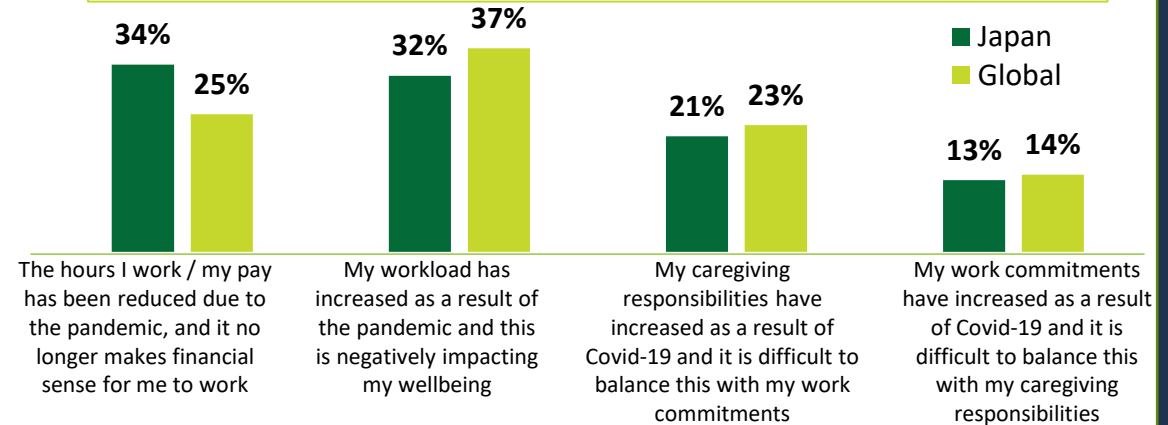
While women in Japan were less worried about their careers than the global average, the percentage of women considering to leave the workforce altogether during the pandemic was on par with the global average. The main reasons for this are "a decrease in work (compensation)" and "an increased burden due to excessive work," –that require an organizational improvement.



of women surveyed in Japan have considered leaving the workforce altogether during pandemic vs. 23% globally



Main reasons why respondents are considering leaving the workforce:



➤ **Organizations need to create inclusive work environments to support working women.**

For those working in inclusive organizations where women are duly evaluated and supported have **higher levels of mental health, job satisfaction, motivation, and productivity than women in other organizations, and are more willing to work in their current organizations for the long term.**

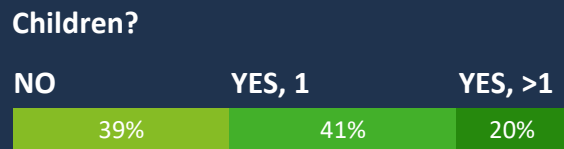
The 3 items on the right table are the largely divided between inclusive and non-inclusive organizations and are considered effective measures for the organizational improvement.



Country profile

500 total respondents in Japan

RESPONDENT PROFILE

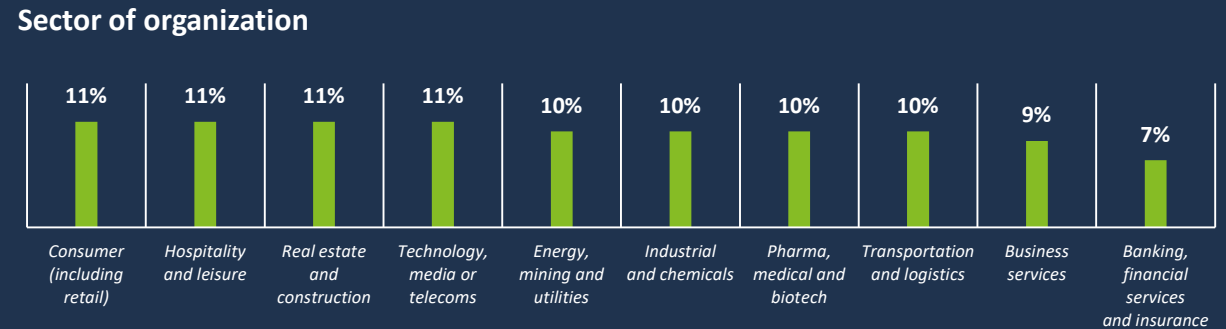


*For the purposes of this research, respondents were asked identifying questions relating to sexual orientation and gender identity. Note that other gender identities and sexual orientations not shown received less than a 1% response rate.

BUSINESS PROFILE



*Note this includes gig workers

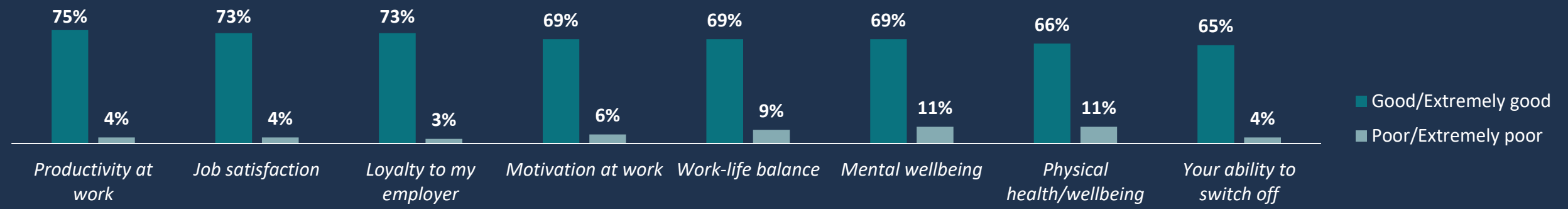




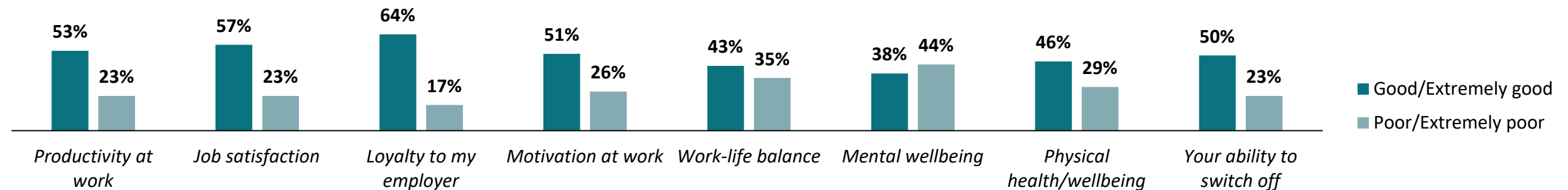
Women’s job satisfaction and wellbeing have been significantly impacted by the pandemic

- Approximately 73% of Japanese women ranked their job satisfaction as good or extremely good before COVID-19. Today, only 57% say the same.
- Women’s work-life balance has also suffered. Pre COVID-19, 69% said they had a good or extremely good work-life balance, while today only 43% say this.
- Women’s wellbeing has been negatively impacted over the course of the pandemic as well. Before the pandemic, 69% of women in Japan ranked their mental wellbeing as good or extremely good, while today only 38% say this.

How would you rate each of the following aspects of **your life pre COVID-19?** (Japan responses only)



And how would you rate each of the following aspects of **your life today?** (Japan responses only)



Demands at home and at work have increased, but few employers provide necessary mental health resources

- Only 40% of Japanese women say their organization has provided sufficient support to women since the onset of the COVID-19 crisis. This is approximately on par with the global average (39%).
- 32% women say their career isn't progressing as fast as they would like, which is lower than the global average (42%). Poor mental health and caregiving/household responsibilities are the main reasons why women feel that their careers are stalling.

% of respondents indicating the below statements are true

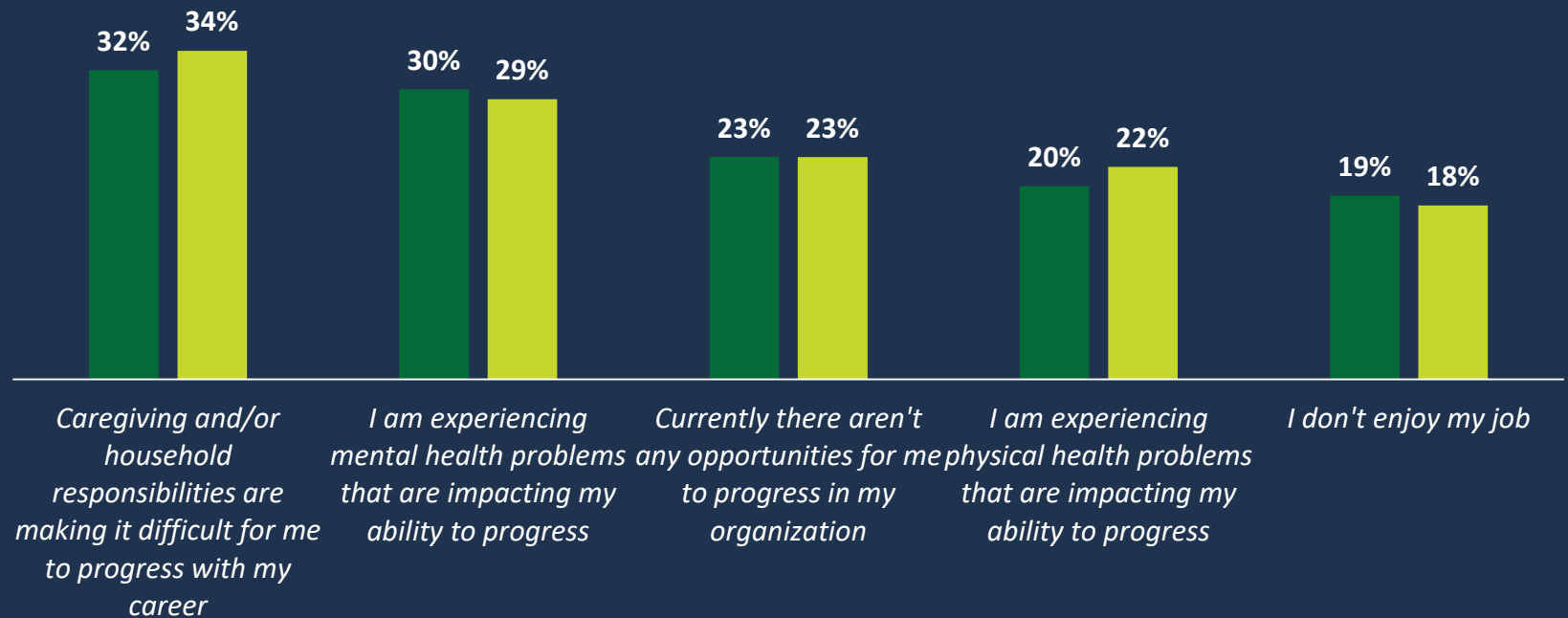


My organization's commitment to supporting women has been sufficient since the COVID-19 crisis broke
vs. 39% globally



My career isn't progressing as fast as I would like currently
vs. 42% globally

Why isn't your **career isn't progressing as fast as they would like at the moment** or you feel less optimistic about your career prospects than you did before the COVID-19 crisis broke? (top 5)



■ Japan ■ Global

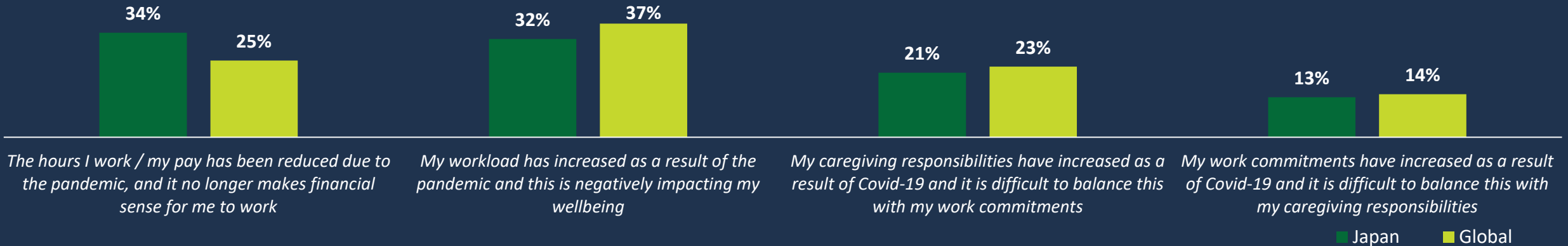


Japanese women are less optimistic about their careers at the moment

- A little over 2 in 5 Japanese women feel less optimistic about their career prospects today compared to before the pandemic.
- 23% of women in Japan are considering leaving the workforce altogether. This is primarily due to an increased workload (32%) and reduced pay or working hours (34%).
- 21% of Japanese women also say that their caregiving responsibilities have increased, which is similar to the global average (23%).



Main reasons why respondents are considering leaving the workforce:



*Note only asked of women who said "I am considering leaving the workforce" n=111 Japan/ n=1152 Global



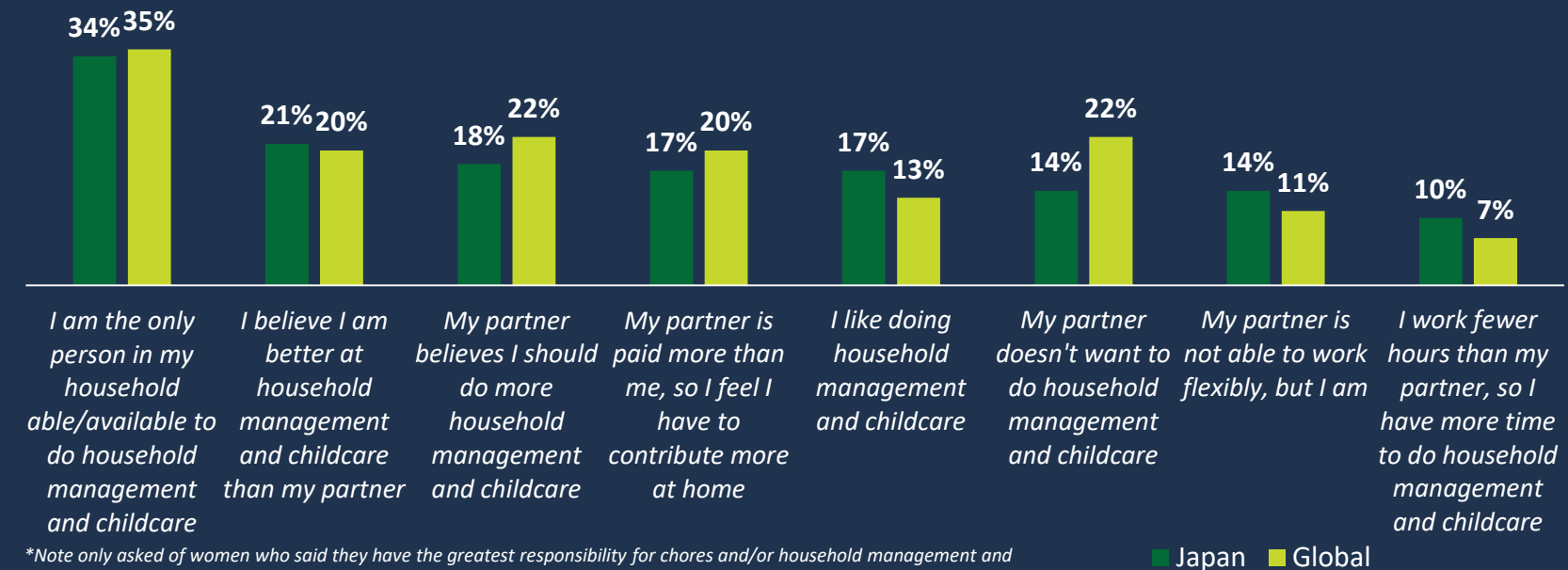
Women are bearing the brunt of responsibilities at home

- Nearly 6 in 10 women in Japan say they have the greatest responsibility for household tasks.
- 34% of women indicate that they are the only person the household who is able or available to manage childcare or the home, on par with the global average (35%). 18% of women indicate that their partner believes they should take on the majority of the household management, which is slightly below the global average (22%).
- 27% of women in Japan say they are less likely than their partner to return to the office when it's safe to do so, on par with the global average (27%).

% of respondents who indicated the below statements are true:



Reasons why women have the greatest responsibility for chores and/or household management and caregiving in their household:



*Note only asked of women who said they have the greatest responsibility for chores and/or household management and caregiving in their household. n=153 Japan/ n=1960 Global



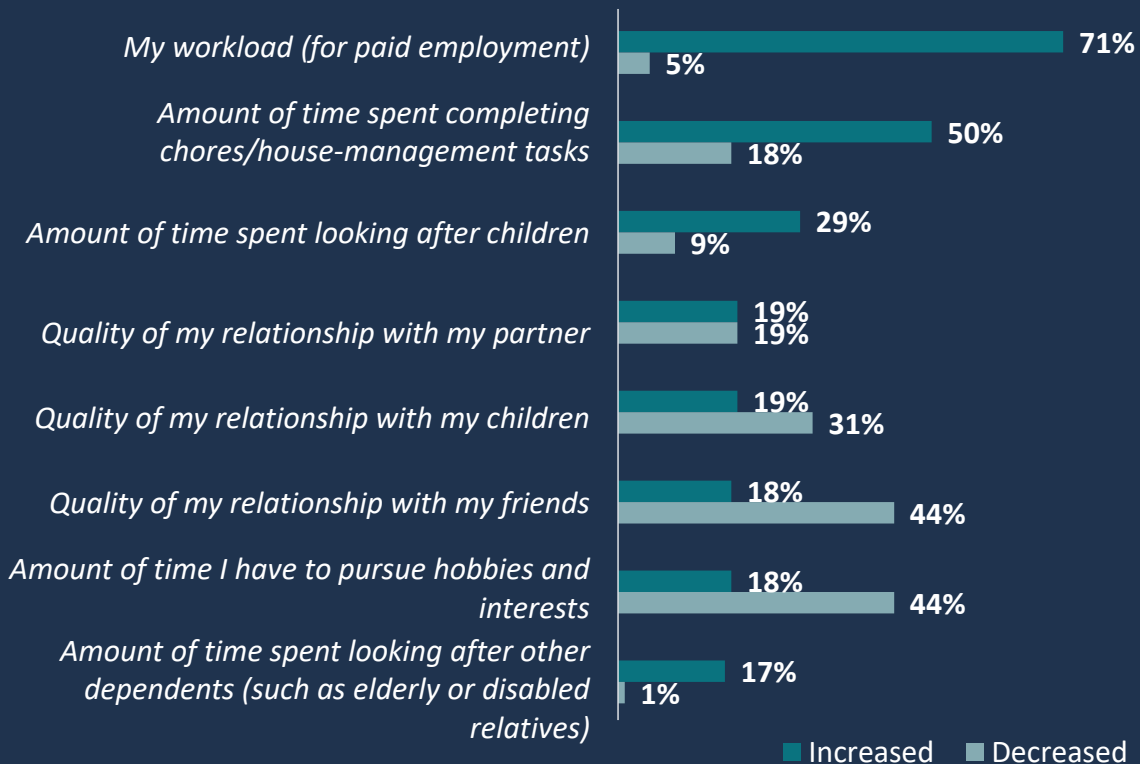
% of women who said they are less likely than their spouse to return to the office when it's safe to do so



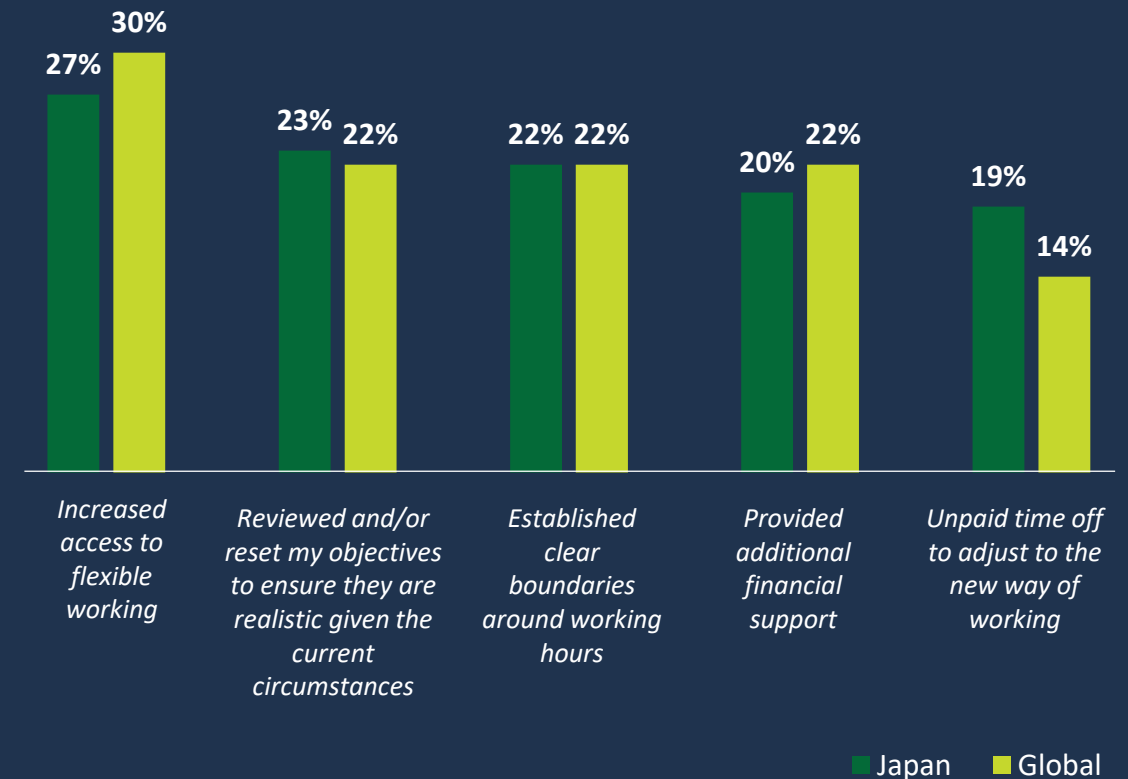
Demands at home and at work have increased, but few employers provide required mental health resources

- 71% of women in Japan report their workload has increased since the COVID-19 crisis broke. 50% say the same of household chores.
- Meanwhile, the time women have to pursue hobbies and the quality of relationships with friends and family have decreased.
- Only 27% say they have increased access to flexible working, slightly less than the global average (30%). However, women in Japan report having access to more unpaid time off to adjust to the new way of working (19%) than the global average (14%).

To what extent, if any, have the following aspects of your life **changed since the COVID-19 crisis broke?** (*Japan responses only*)



Has your employer put in place any of the following to help mitigate the **impact of the pandemic on the mental wellbeing** of employees? (Top 5)

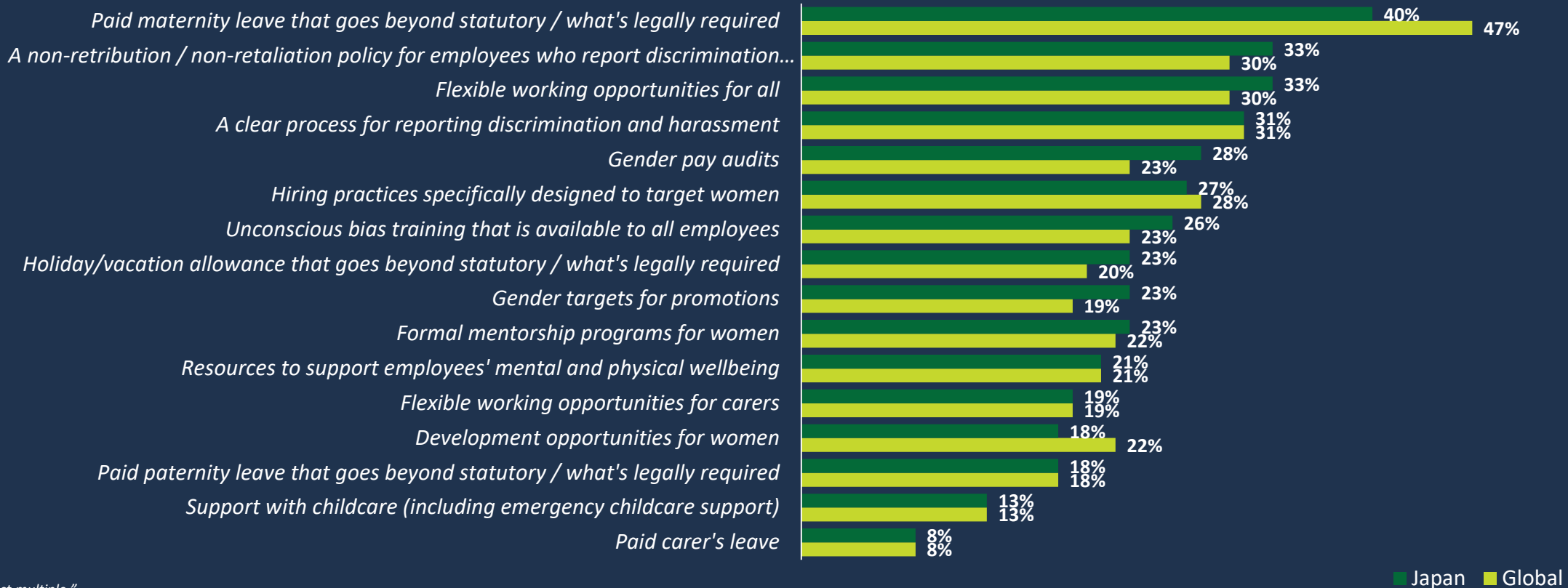




Less than half of organizations are providing enough professional development opportunities

- 4 in 10 women in Japan report their organizations have implemented paid maternity leave that goes beyond what is legally required – seven points below the global average (47%).
- Just 18% of women in Japan report working for organizations that provide development opportunities for women, compared to 22% in the overall sample.
- However, women in Japan lead the global averages in working for companies with non-retribution policies (33% Japan vs. 30% global), flexible working opportunities for all (33% Japan vs. 30% global), and gender targets for promotions (23% Japan vs. 19% global).

To the best of your knowledge, which, if any, of the following has your organization implemented?



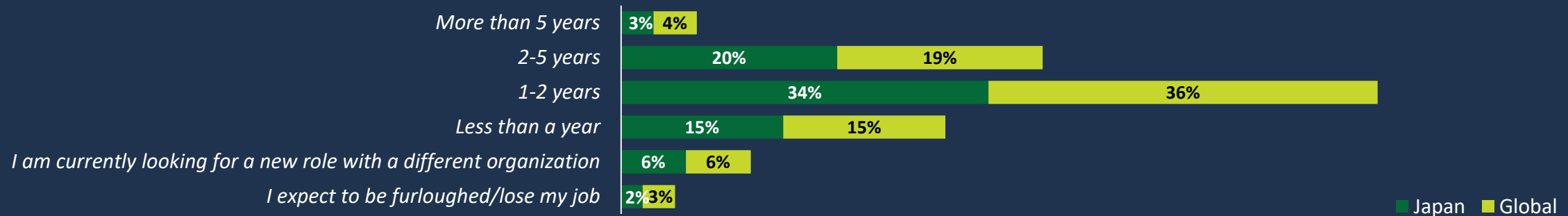
*Note "select multiple."



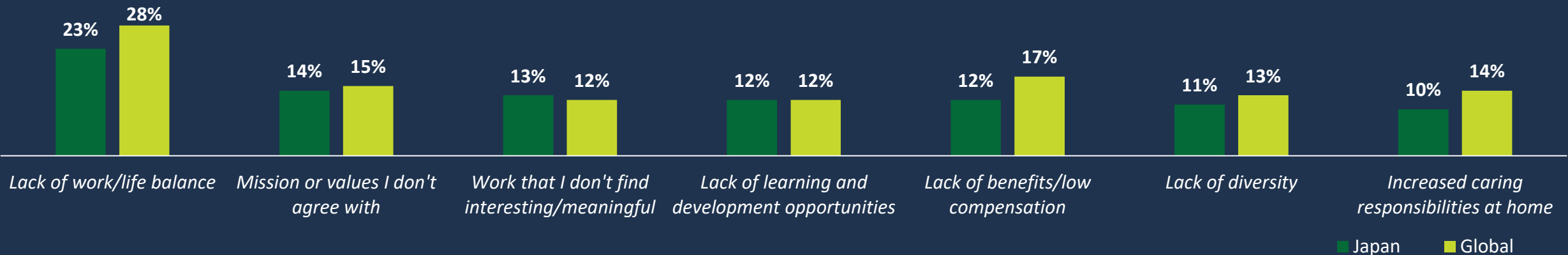
Most women plan to stay with current employer less than two years due to poor work-life balance

- 57% of Japanese women report they expect to stay with their employer for two years or less.; 20% plan to stay 2-5 years, and only 3% plan to stay more than 5 years.
- Lack of work-life balance is the biggest reason why women are considering leaving their employer (23%), followed by mission or values they don't agree with (14%) 13% of Japanese women would also consider leaving their current jobs because they don't find the work interesting or meaningful.

Given the current circumstances, **how much longer do you expect to stay with your employer?**



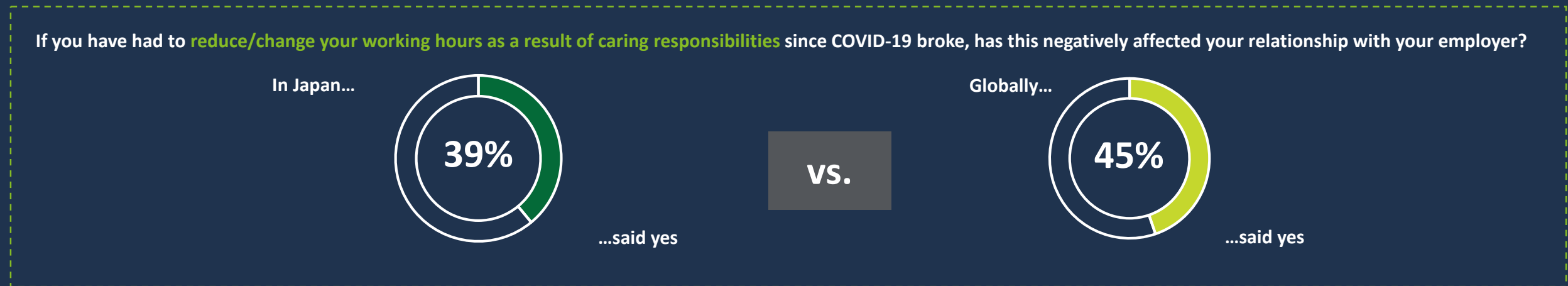
Which, if any, of the following reasons could **lead to you considering leaving** your current employment? (Top 7 of all selected)





Women report that when they are overworked, their relationship with their employer suffers

- 39% of women in Japan report the relationship with their employer has been negatively impacted because they have changed or reduced their working hours. This is slightly lower than the global average (45%).
- As a result of the change in working hours, women report they feel burned out (60%) and feel like they are less likely to be considered for a promotion (19%). 18% of women also report that changing their working hours has meant that they have been given less responsibility overall.



How has your **relationship with your employer** been affected as a result of the change in your working hours?



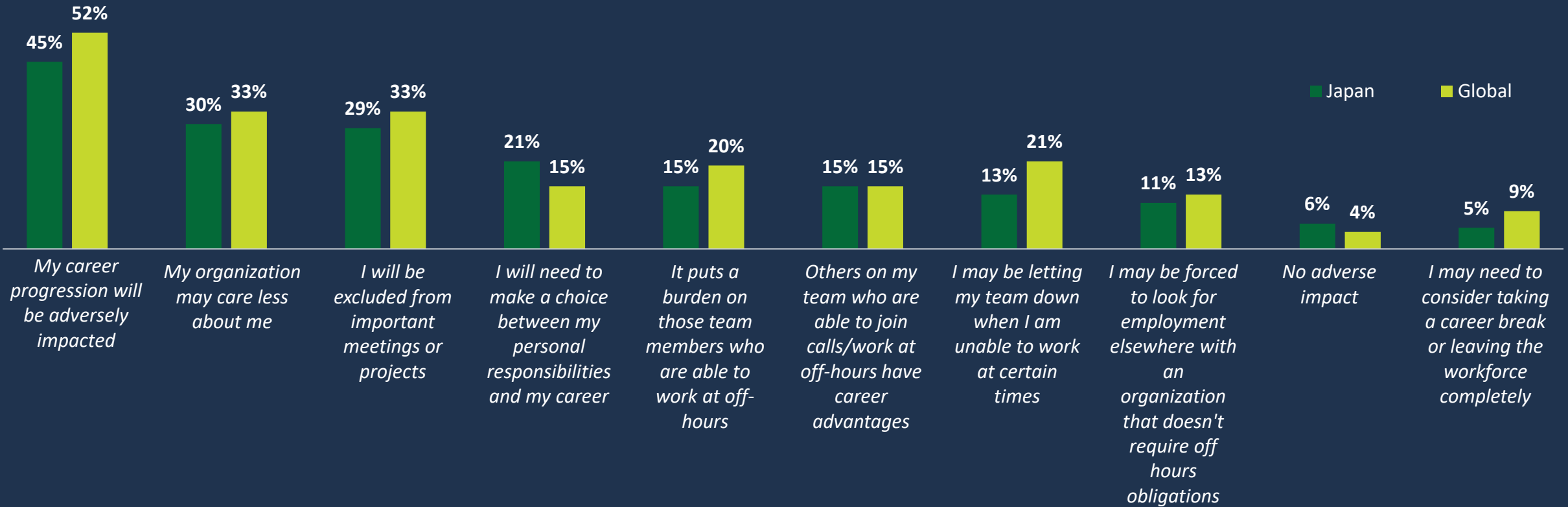
*Note only asked of women who said the relationship with their employer has been negatively impacted because they have changed or reduced their working hours n=193 Japan / n=2237 Global
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Women are not “switching off from work” because they fear negative impacts on their career progression

- 45% of women in Japan say that if they are not ‘always on’, their career progression will be adversely impacted. This is high, but nonetheless lower than the global average of 52%.
- 21% of Japanese women who find it difficult to switch off say they will need to make a choice between their personal responsibilities and their career, compared to 15% globally.
- By the same token, women in Japan report being slightly less concerned that their organization may care less about them if they were to switch off from work than the global average (30% Japan vs. 33% global), that it puts a burden on other team members (15% Japan vs. 20% global), or that they may be letting their team down (13% Japan vs. 21% global).

Of those respondents who indicated they find it difficult to switch off from work, % that indicated concerns of the following happening if they did:



*Note “select multiple.” Only asked of women who said they find it difficult to switch off from work n=117 Japan/ n=1535 Global
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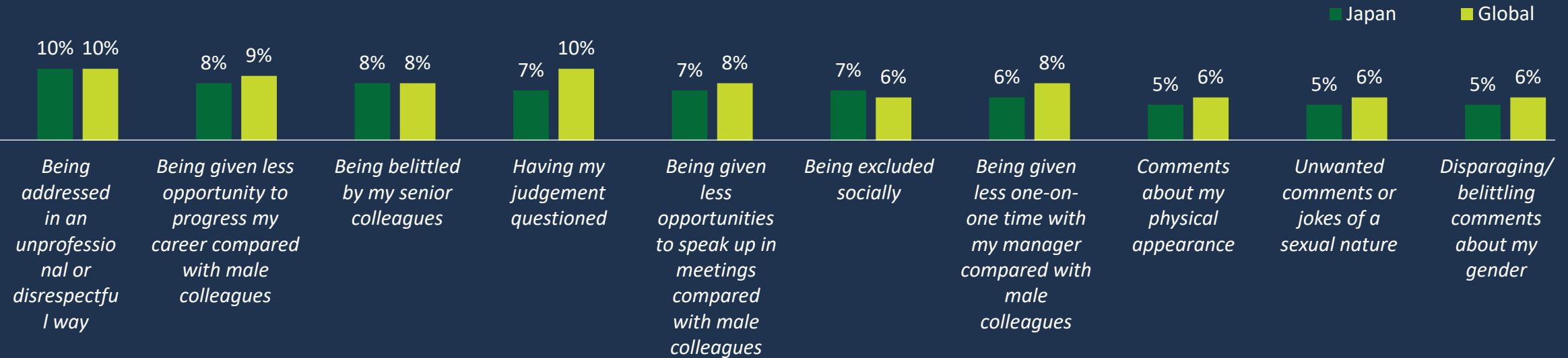
Half of women in Japan have experienced microaggressions in the last 12 months

- 52% of women in Japan report they have experienced microaggressions in the last 12 months, which is lower than the global average of 58%.
- Being addressed in an unprofessional way (10%) and having fewer opportunities (8%) to progress compared with male colleagues are the most common non-inclusive behaviors women in Japan have experienced. 8% of Japanese women also say that they have been belittled by senior colleagues.

Women who said they had **experienced microaggressions in the last 12 months:**



Of those who had experience microaggressions, the % who indicated experiencing the following **non-inclusive workplace behaviors** over the past 12 months? (Top 10)

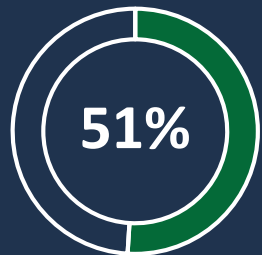


*Note "select multiple."
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Most women do not report non-inclusive behaviors to their employers

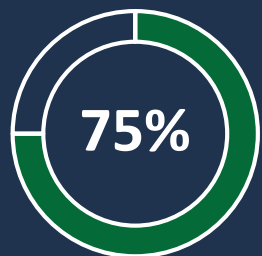
- 51% of women in Japan did not report the behavior(s) they had experienced. Of those, 26% didn't feel the behavior was serious enough to report.
- Women in Japan are less likely to say they were satisfied with their employer's response to them reporting the issues, compared to the global sample – 75% in Japan vs. 80% globally.
- By the same token, women in Japan were less likely to say that they were concerned that reporting the issue would adversely impact their career (16% Japan vs. 25% global).

Did you **formally report** any of these behaviors to your organization?



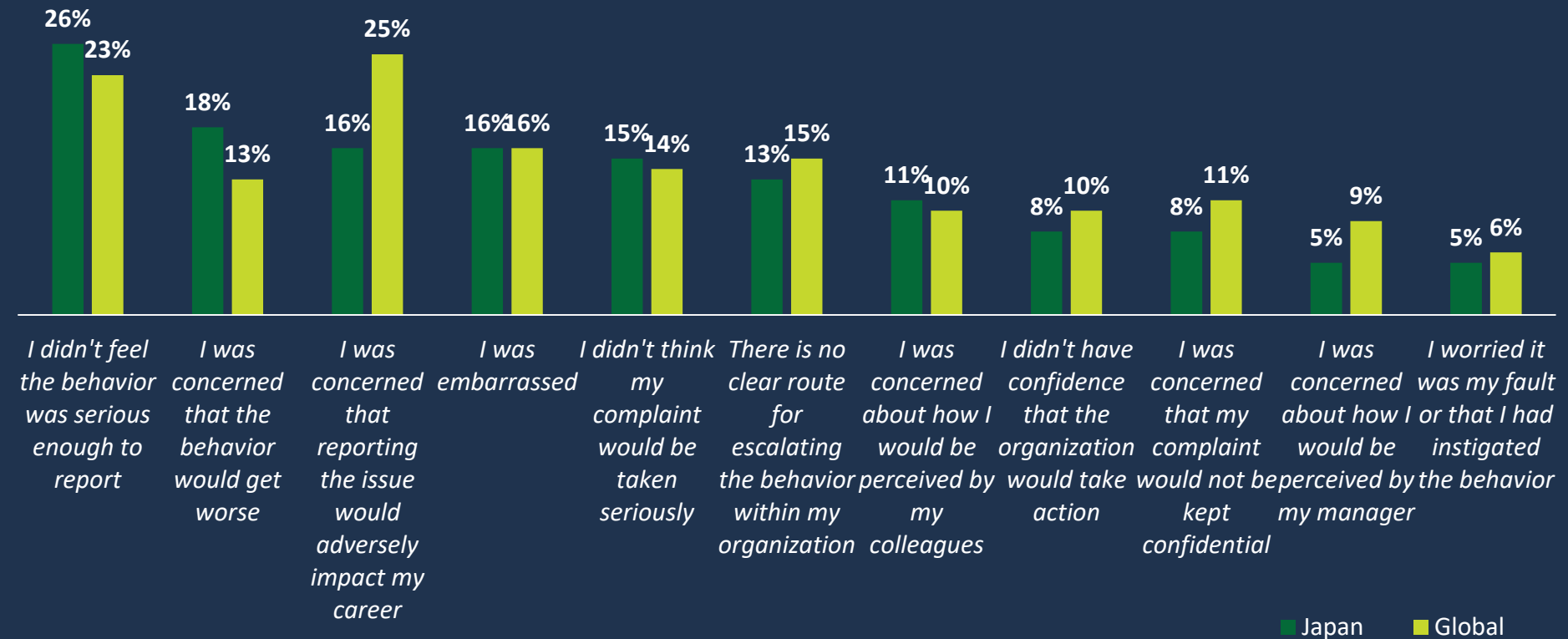
in Japan chose not to report
vs. **57%** globally

Were you **satisfied with the action your employer took** in response to you reporting the issue(s)?



in Japan said they were satisfied
vs. **80%** globally

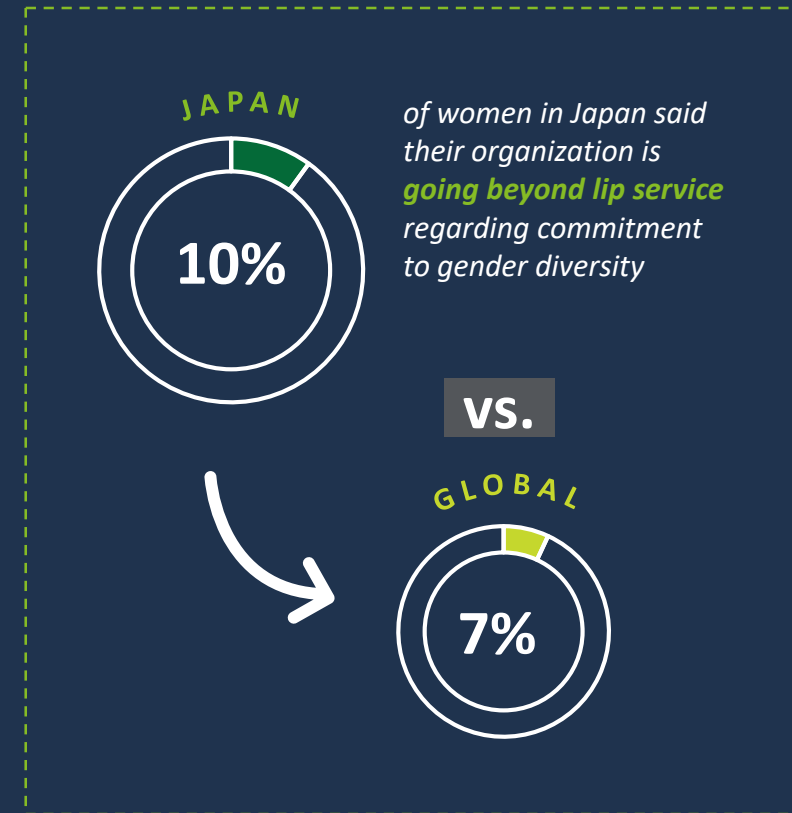
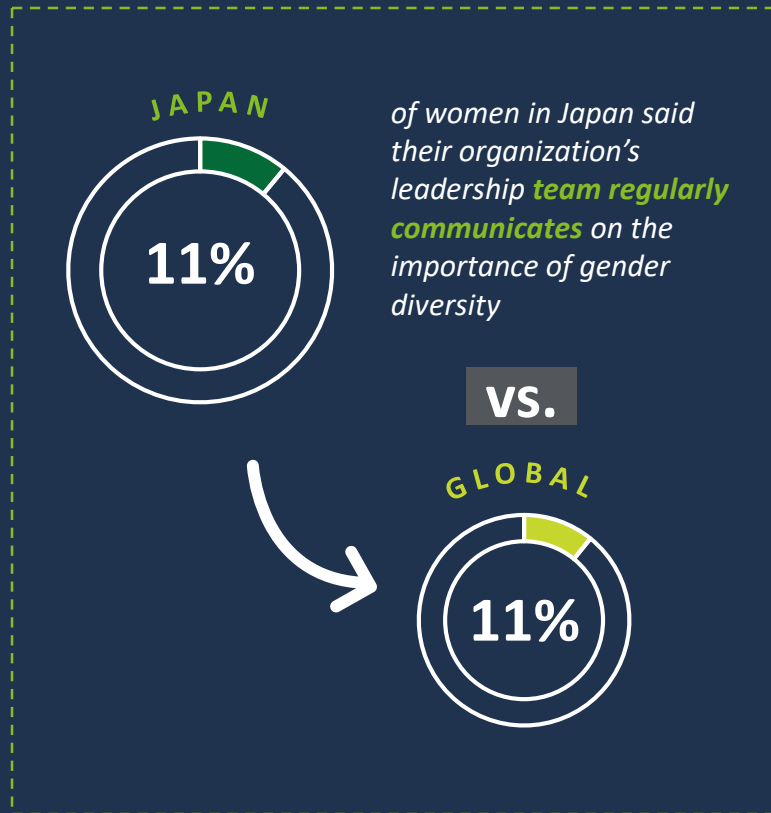
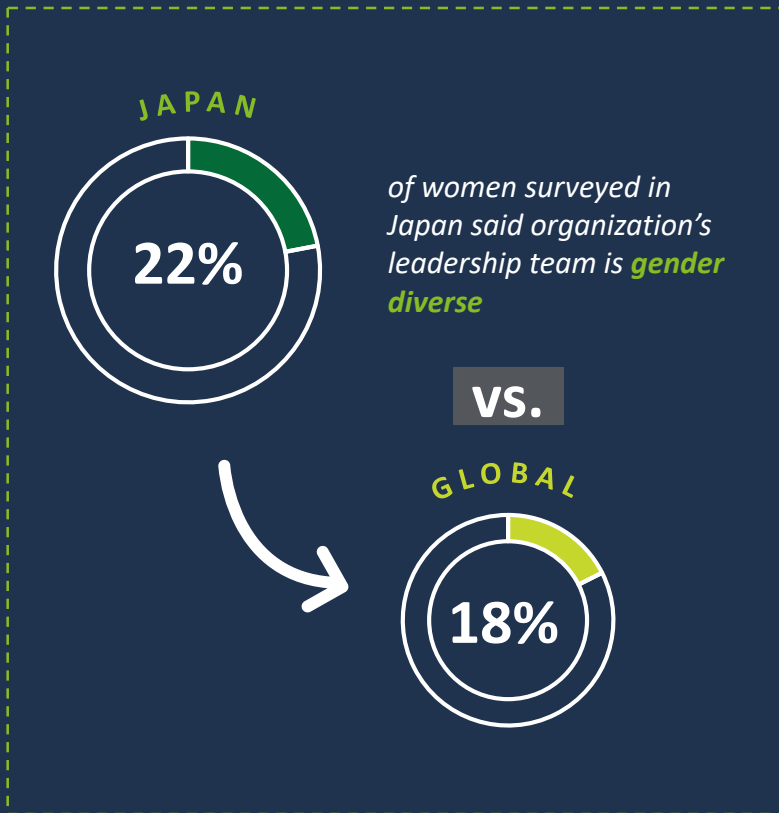
Reasons for not reporting some of these behaviors:



Few women feel that their organizations are deeply committed to gender diversity

- Just over one fifth women in Japan – 22% – report their organization’s leadership team is gender diverse, compared to 18% globally.
- Few women – 11% in Japan – also say their organization regularly communicates on the importance of gender diversity.
- Only 10% of women in Japan say their organization goes beyond lip service in their commitment to gender diversity.

% of respondents who agree with the following statements





A small group of “gender equality leaders” are cultivating inclusive, high-trust cultures for women


- 4% of the global sample, or around 200 respondents, reported working for organizations that consistently led the overall sample in their support of women. We were able to isolate the “gender equality leaders” from Japan and the global sample based on their female employees’ agreement with **all three** statements below.
- In contrast, 31% of the surveyed women work for “lagging organizations,” which have not committed to these three actions and the development of an inclusive, high-trust culture.

Most employers can be doing more to help.

We identified a group of women who agree with the following three statements, indicating an inclusive, high-trust culture where women are valued and supported:



I feel **confident to report non-inclusive behaviors**, without concern for reprisal



I feel supported by my employer to **balance work with other commitments**



My **career is progressing** as quickly as I would like currently

Women who agree with all three statements report higher levels of **mental wellbeing, job satisfaction, motivation and productivity** compared with women who disagree with the above three statements. They also plan to stay with their employer for longer. We call this group of employers the gender equality leaders.

Breakdown of gender equality leaders and lagging organizations in Japan:

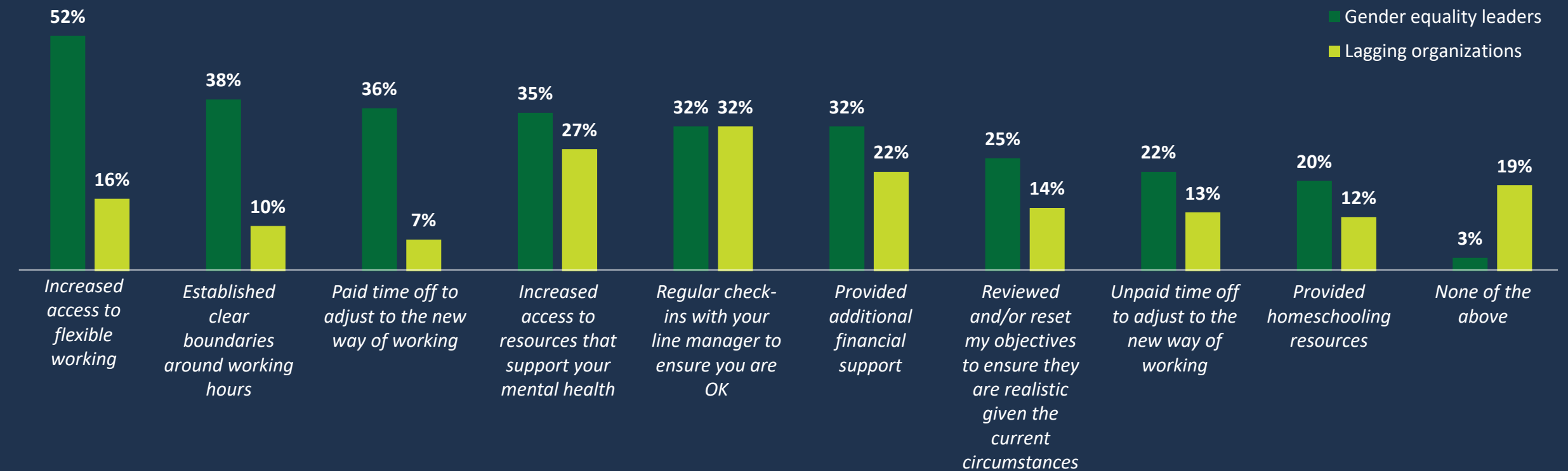




Gender equality leaders are more likely to have taken steps to support flexible working and boundaries

- Gender equality leaders are more likely to have increased access to flexible working than lagging organizations, established clear boundaries around working hours, and provided paid time off during the pandemic.
- A quarter of gender equality leaders have reviewed or reset women’s objectives to ensure they are realistic in the current circumstances, 22% have provided unpaid time off to adjust to the new way of working, and 20% have provided homeschooling resources.
- Nearly one-fifth of lagging organizations have taken none of these actions to support women’s mental wellbeing.

% who say their employer has put in place the following to help mitigate the impact of the pandemic on the mental wellbeing of employees

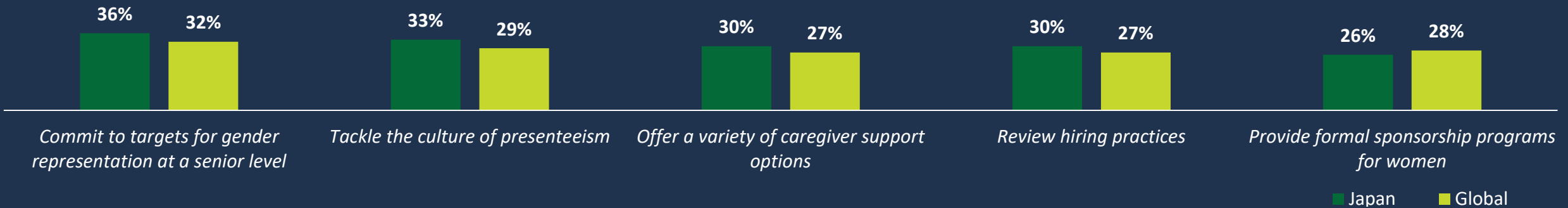




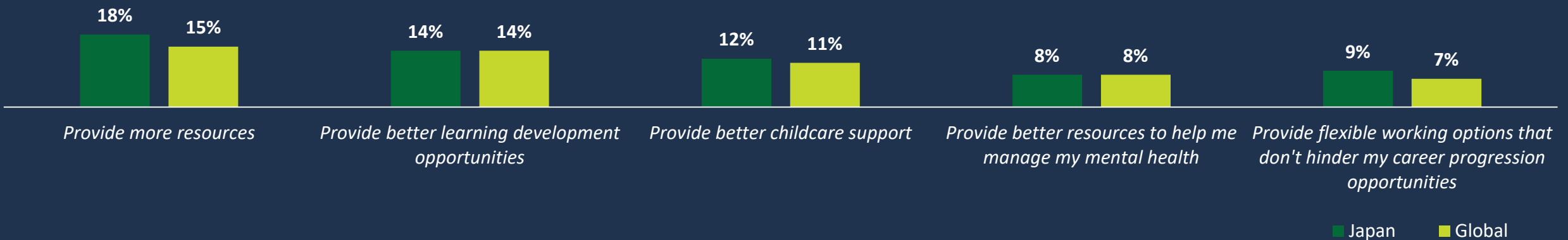
Employers can improve gender equality at work by committing to gender targets and tackling “presenteeism”

- 36% of women in Japan say that to improve gender equality in the workplace, their employer should commit to gender representation at a senior level, followed by tackling a culture or presenteeism (33%).
- Providing more support resources (18%) is the most beneficial thing that employers can do to support women’s career development in Japan, followed by providing better learning opportunities (14%). These learning opportunities include stretch assignments and applied roles in different parts of the organizations.

What do you think your employer could do to improve gender equality in your workplace? (Top 5)



Aside from increasing your pay, what would be the most beneficial thing(s) your organization could do to support your career development and ensure you stay at this company in the long term? (Top 5)



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