

**Deloitte.**



## 2023 Women @ Work Report

Japan

## Global summary

- Since 2021, Women @ Work: A Global Outlook has provided insight into the views of women when it comes to their experiences in the workplace. Past findings were dominated by the negative impact of the pandemic on women, alongside increasing exposure to non-inclusive behaviors, burnout, and challenges with hybrid working. This year's survey of 5,000 women across 10 countries shows some glimpses of improvement, however there are still many critical aspects of women's experiences in the workplace that have either not improved or—in some cases—worsened.
- The following deck examines **how women in Japan stand out from their global counterparts** on key themes.

### Key global findings:



**Drop in burnout represents some progress, but mental health is still poor—and stigma remains.** Although this year has seen a significant decrease in women who report feeling burned out—just under 30% versus 46% last year—and respondents rate their overall mental well-being as slightly better than last year's, the picture remains concerning.



**When it comes to menstruation and menopause, many women are often struggling in silence.** One in five women report experiencing health challenges related to menstruation or menopause. Over 40% of women experiencing challenges related to menstruation and 20% related to menopause say they work through any discomfort.



**Broader concerns about women's rights, financial security, personal safety prevail.** When asked to rate their concerns about external factors outside of the workplace and societal issues, respondents cited the rights of women as their top concern (59%), followed by financial security (58%), physical and mental health (both at 56%), and personal safety (54%).



**Women bear the greatest responsibility for household tasks, and often feel they need to prioritize their partners' careers.** Nearly half of the women polled have primary responsibility for domestic tasks such as cleaning or caring for dependents, with around 10% saying that these responsibilities fall to their partner.



**Women want more flexibility at work, but it is still not a reality for many—and this is impacting their career choices.** More survey respondents have left their jobs in the past year than in 2020 and 2021 combined. Lack of flexibility around working hours is one of the top three reasons women left their employers in the past year and is the top reason cited by women who are currently looking to leave their employer.



**Hybrid work experiences are improving, but challenges remain.** 37% of women with hybrid work arrangements report experiencing exclusion from meetings, decisions, or informal interactions. And 30% say they don't have enough access to senior leaders.



**Women are still experiencing non-inclusive behaviors—and many are not reporting them to their employers.** 44% of respondents reported experiencing harassment or microaggressions in the workplace over the past year. While this is a significant decrease from the 59% who reported this in 2022 (and 52% in 2021), it remains that nearly half of women have experienced this behavior



**Women in under-represented groups still face more challenges in the workplace.** Similar to our previous two reports, our 2023 research found that women in under-represented groups face more significant challenges than the overall sample when it comes to mental health, non-inclusive behaviors, work/life balance, and burnout.



### *Gender equality leaders remain few and far between*

The proportion of women who work for Gender Equality Leaders—organizations that, according to the responses of the women surveyed, foster inclusive cultures that support them and promote mental well-being—remains at 5%, the same as last year. Women who work for Gender Equality Leaders continue to report more positive mental health, are more likely to recommend their employer to others, have their preferred working situation, and are less likely to experience non-inclusive behaviors. They are also less likely to work through symptoms relating to menstruation and menopause. These women all plan to stay longer with their employer—none of the women surveyed who work for Gender Equality Leaders were looking for a new role and nearly 70% plan to stay with their current employer for three years or more.

# Japan country profile

- We surveyed **500 women** in Japan.

## Japan respondent profile:

### Ethnicity



■ Asian

### Age



■ 18-25 ■ 26-38 ■ 39-54 ■ 55-64

### Seniority



■ C Level ■ Senior management ■ Middle management ■ Non-managerial

Base = 500

### LGBT+\*



**100%**  
Heterosexual/straight

\*Note that gender identities and sexual orientations not shown received less than a 1% response rate. Respondents were able to opt out of answering a question about their sexuality; 304 women answered this question in Japan.

### Employment Status



■ Employed part time (including 'gigs') ■ Employed full time

### Percentage of hybrid, fully remote, and fully in-person workers



■ Hybrid ■ Fully remote ■ Fully in-person

### Sector of organization



**9%**  
Banking, financial services and insurance



**33%**  
Energy, transport and industrials



**8%**  
Business services (including professional services and law)



**11%**  
Health care and life sciences

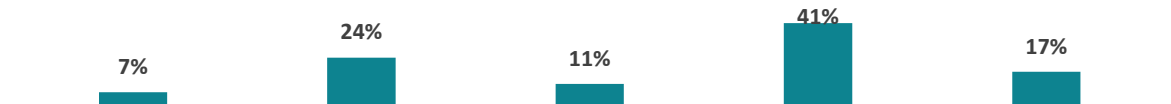


**28%**  
Consumer (including retail, real estate, hospitality)



**11%**  
Technology, media or telecom

### Organization's total global annual revenue (in USD)



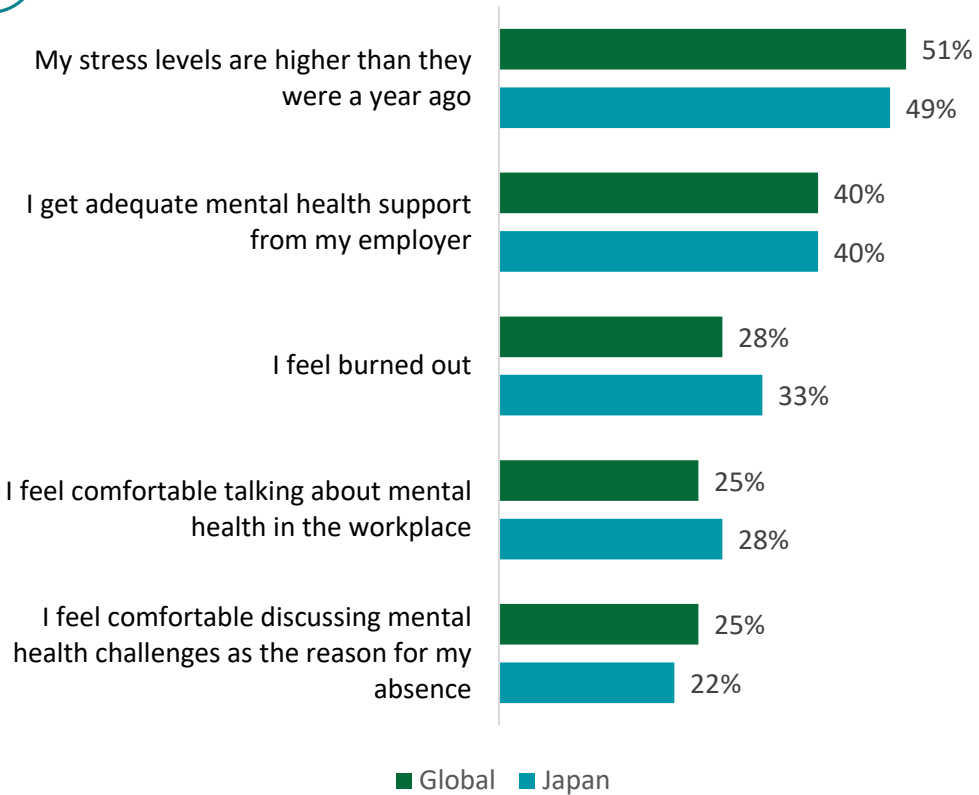
Base = 500

# Amid glimpses of progress, women's mental health is still poor—and stigma remains

- Japanese women report slightly lower levels of stress and higher burnout than their global counterparts. Slightly more women in Japan feel comfortable discussing mental health in the workplace than the global average. In Japan, older women feel more comfortable discussing mental health in the workplace than younger women.
- Japanese women report declines in physical health and ability to switch off from work, but better mental well-being and similar work/life balance compared with last year.



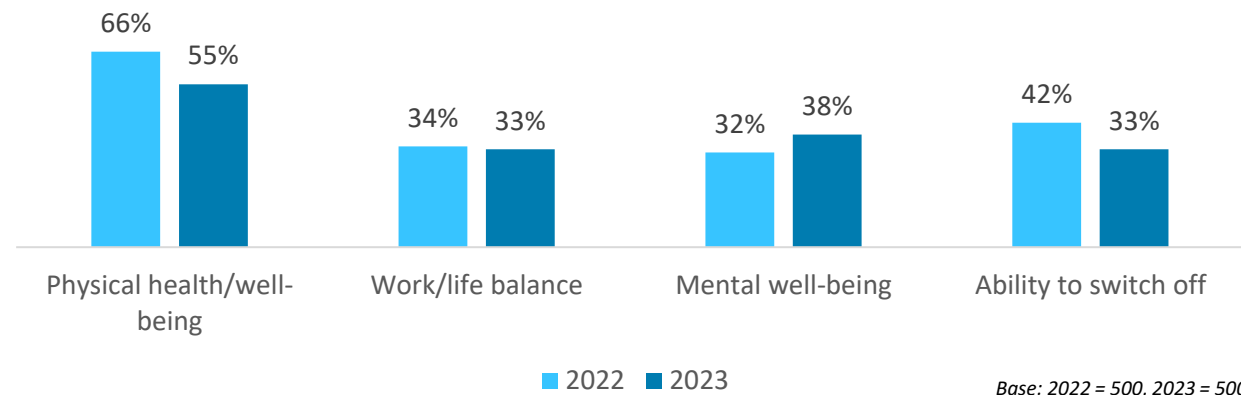
## Which of these statements are true for you?



Base: Global = 5,000, Japan = 500



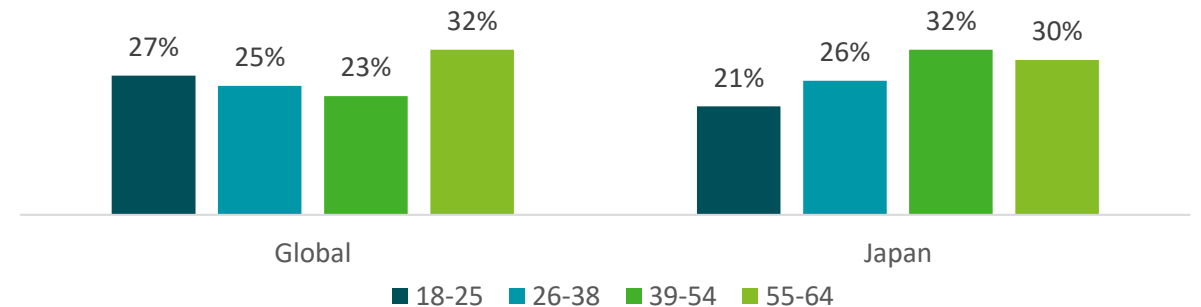
## How would you rate each of the following elements of your life today? (Japanese women saying good/extremely good)



Base: 2022 = 500, 2023 = 500



## I feel comfortable talking about mental health in the workplace (percentage saying true)



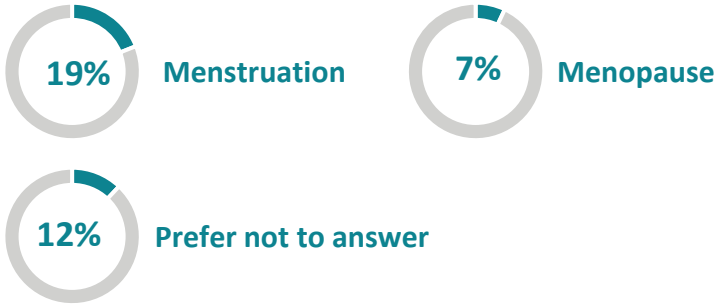
Base: Global 18-25 = 750, 26-38 = 1,500, 39-54 = 2250, 55-64 = 500, Japan 18-25 = 75, 26-38 = 144, 39-54 = 227, 55-64 = 54

# When it comes to women's health, many are suffering in silence

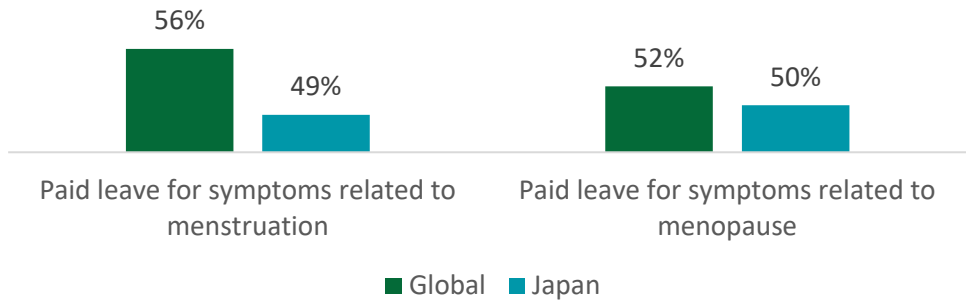
- Japanese women experiencing health challenges related to menopause are more likely than the global average to work through any pain or symptoms (20% globally versus 35% in Japan). 44% of Japanese women say they work through any symptoms related to menstruation versus 40% globally.
- Around half of women in Japan believe it is important for companies to offer paid leave for symptoms related to menstruation and menopause.



## Percentage of women experiencing reproductive health challenges in Japan:



## How important do you think it is for organizations to offer the following?

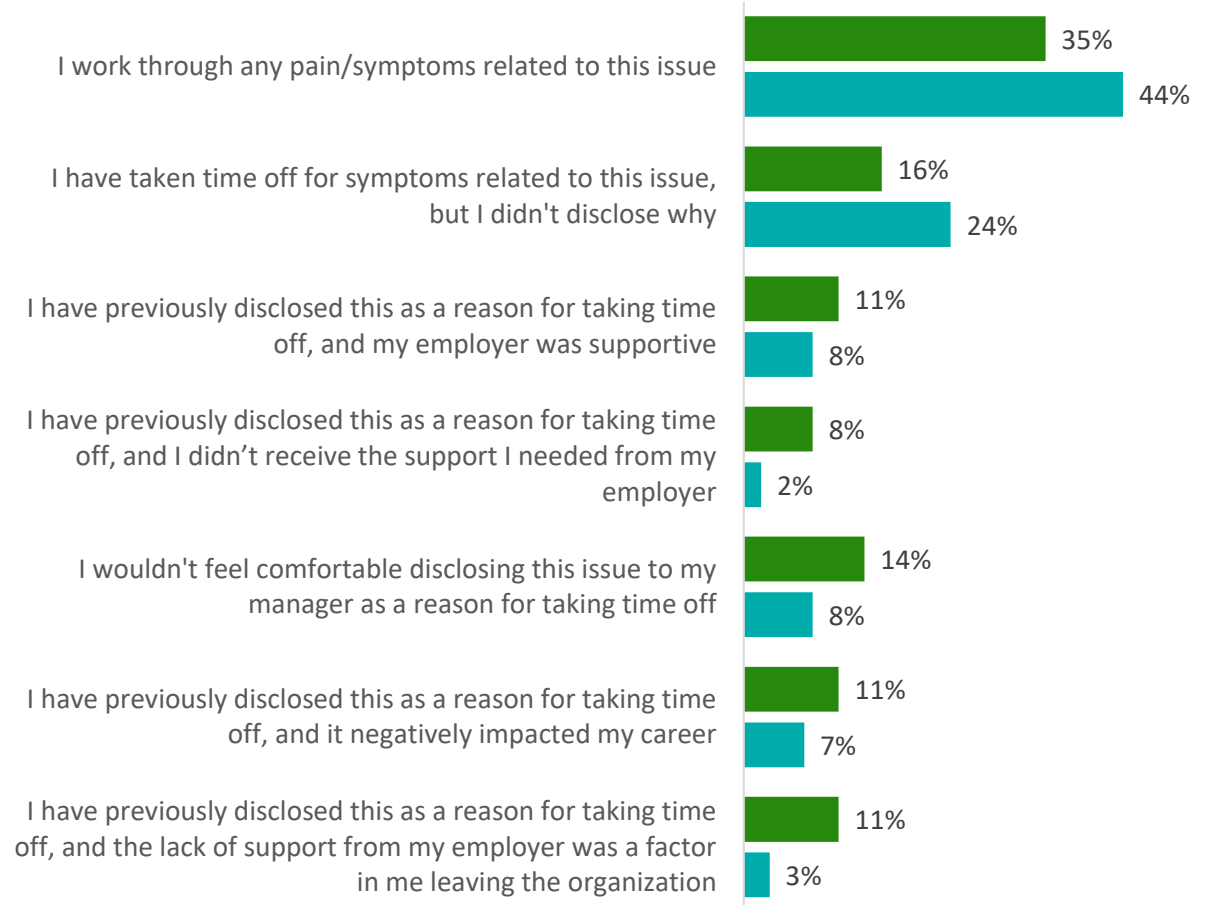


Base = 500

Base: Global = 5,000, Japan = 500



## Which of the following statements apply? (Japanese women)



■ Menopause ■ Menstruation

Base: Menopause = 37, Menstruation = 96

## Factors outside of the workplace also take a toll

- Women in Japan cite financial security, their physical health, and their family’s safety and well-being as their top three concerns.
- As with their global counterparts, women with partners in Japan are more likely to be primarily responsible for childcare and other domestic tasks such as cleaning in their household.
- Nearly 60% of women in Japan say their partner is the primary earner in the household.

### Top 3 concerns of women in Japan:



**57%**  
Financial security



**52%**  
My physical health



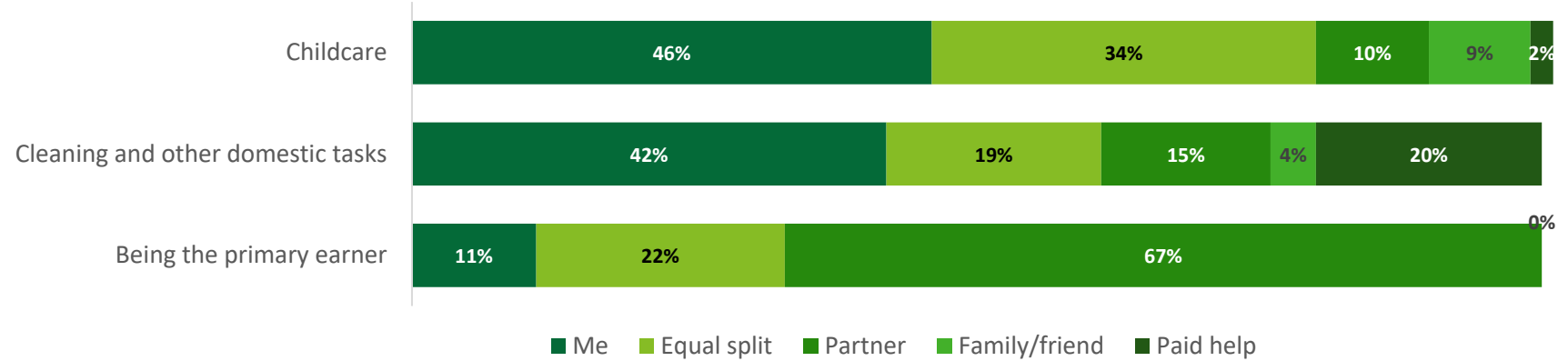
**51%**  
The well-being and safety of family members

Base = 500



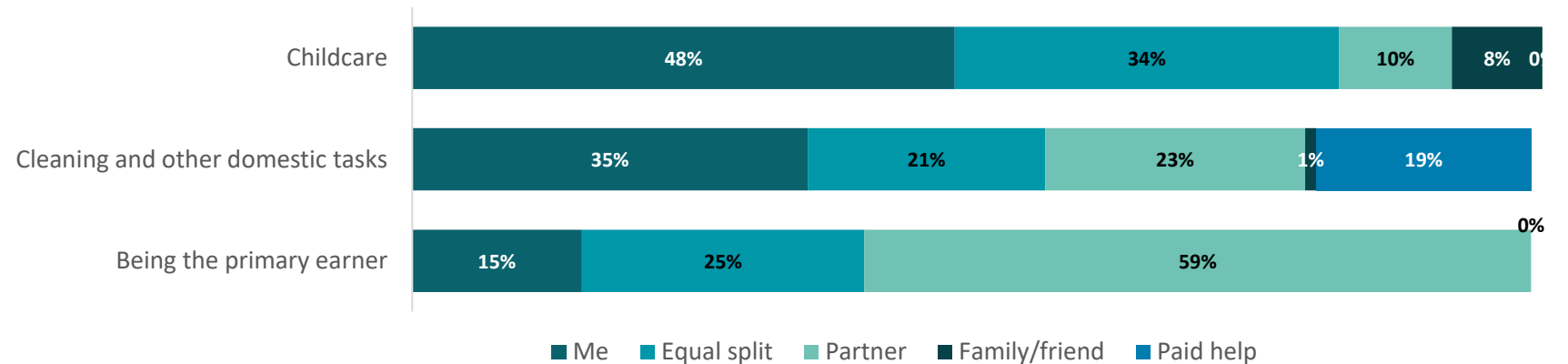
### In your household, who has the greatest responsibility for each of the following tasks? (women living with partners)

#### Global:



Base: Childcare = 826, Cleaning = 2963, Being the primary earner = 2963

#### Japan:

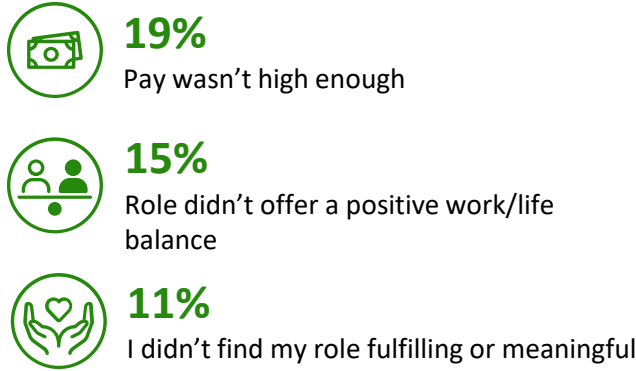


Base: Childcare = 105, Cleaning = 311, Being the primary earner = 311

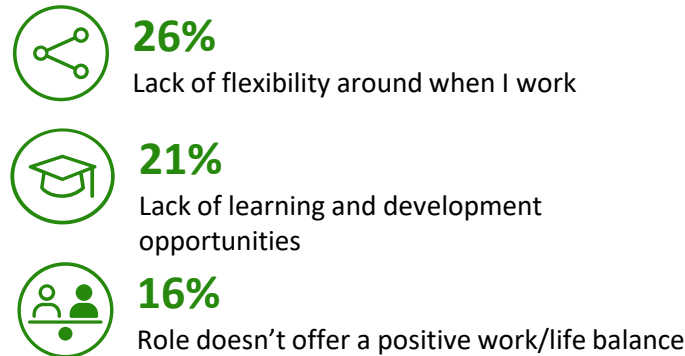
# Women are seeking more flexibility, and making career choices accordingly

- At a global level, more survey respondents have left their jobs in the past year than in 2020 and 2021 combined. Globally, this means 18% of women have left in the past year. In Japan, 22% of women have left their job in the past year.
- Women in Japan with high flexibility over when and where they work plan to stay longer with their employers than those without. Flexibility is a top deciding factor for women who are considering leaving their current employer. Pay and work/life balance are top factors for women who have recently left an employer.

## What was your main reason for leaving your former employer? (Japanese women)



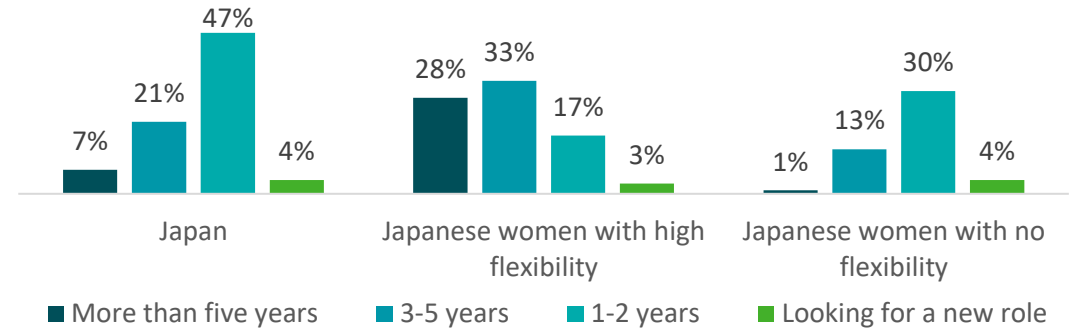
## What is your main reason for wanting to leave your employer? (Japanese women)



Base: Left their job in the past year = 111, Want to leave their job = 19



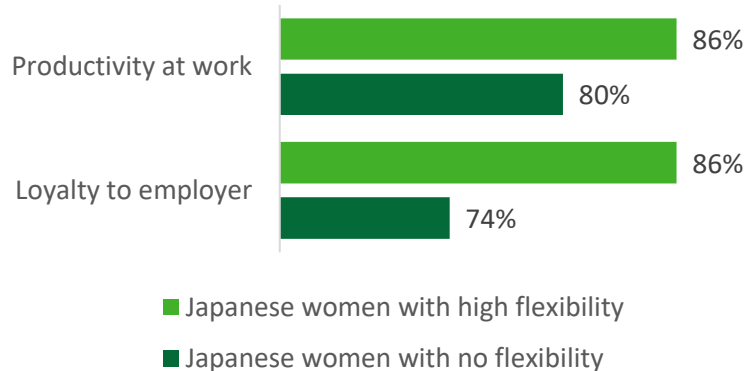
## How long do you plan to stay with current employer?



Base: Japan = 500, No flexibility = 69, High flexibility = 36



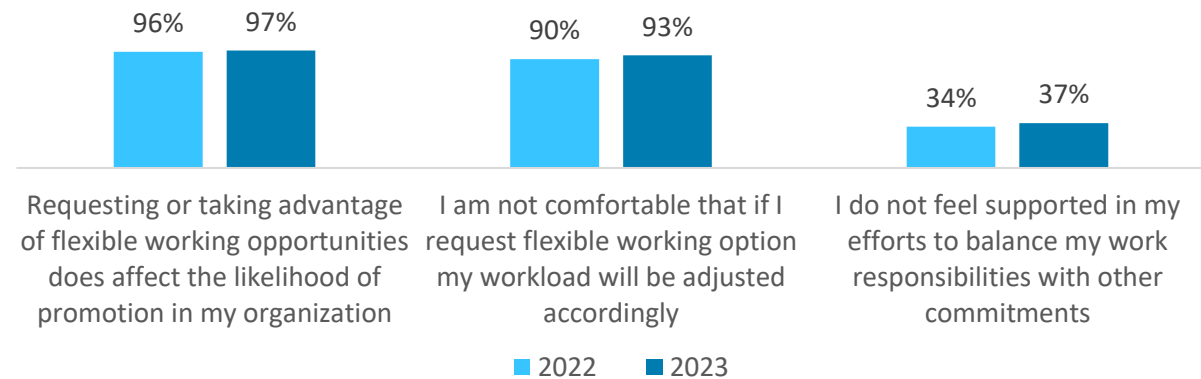
## How would you rate each of the following aspects of your life today? (percentage who rated good or extremely good)



Base: No flexibility = 69, High flexibility = 36



## Which of the following statements do you agree with? (Japanese women)



Base: 2023 = 500, 2022 = 500

## Hybrid working is getting better—for some

- Women working hybrid in Japan are reporting significantly better experiences than last year. Only 18% of women still say they don't have enough exposure to leaders and 15% say they feel excluded.
- More women in Japan working in hybrid environments report a lack of clarity around their employer's expectations compared to last year. The same number of Japanese women report a lack of flexibility and predictability in hybrid environments as last year.



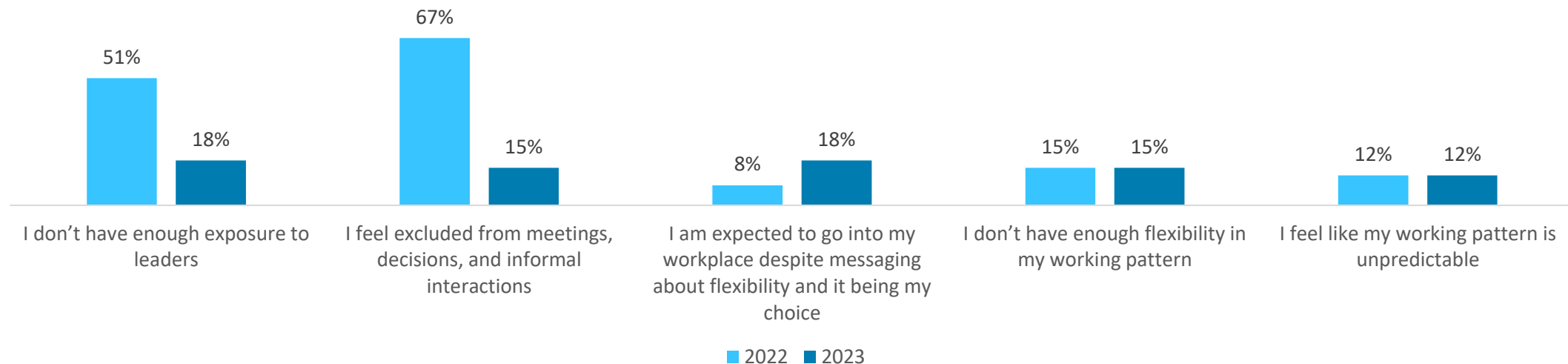
### Percentage of women working in a hybrid environment



Base: Global = 5,000, Japan = 500



### Which of the following behaviors have you experienced over the past 12 months? (Japanese women)



Base: 2023 = 168, 2022 = 226



# Non-inclusive behaviors remain

- Similar to the global average, women in Japan experienced fewer non-inclusive behaviors in 2023 than in 2022. The most reported behavior was being given fewer opportunities to speak up in meetings compared with male colleagues.
- Among women in Japan that chose not to report these experiences to their employer, 36% say they didn't feel the behavior was serious enough to report.



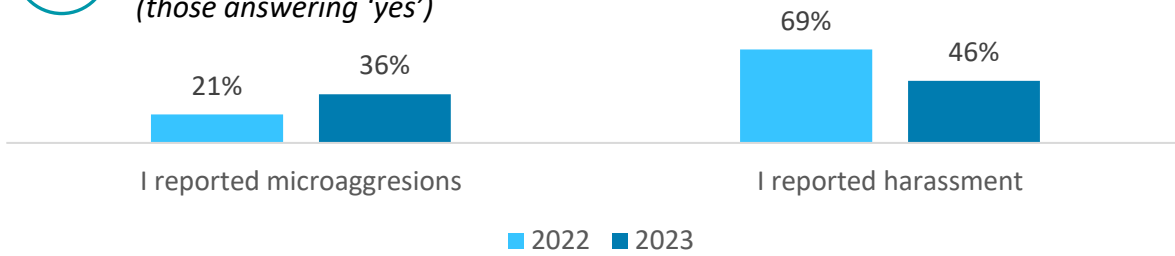
**In the past year, I have experienced at least one non-inclusive behavior:**



Base: 2022 global = 5,000, Japan = 500, 2023 global = 5000, Japan = 500



**Did you formally report any of these behaviors to your organization? (those answering 'yes')**



Base: 2022 = 317, 2023 = 244

## Top three reasons for not reporting behaviors in Japan:



**36%**

I didn't feel that the behavior was serious enough to report



**15%**

I was concerned that reporting the issue would adversely impact my career



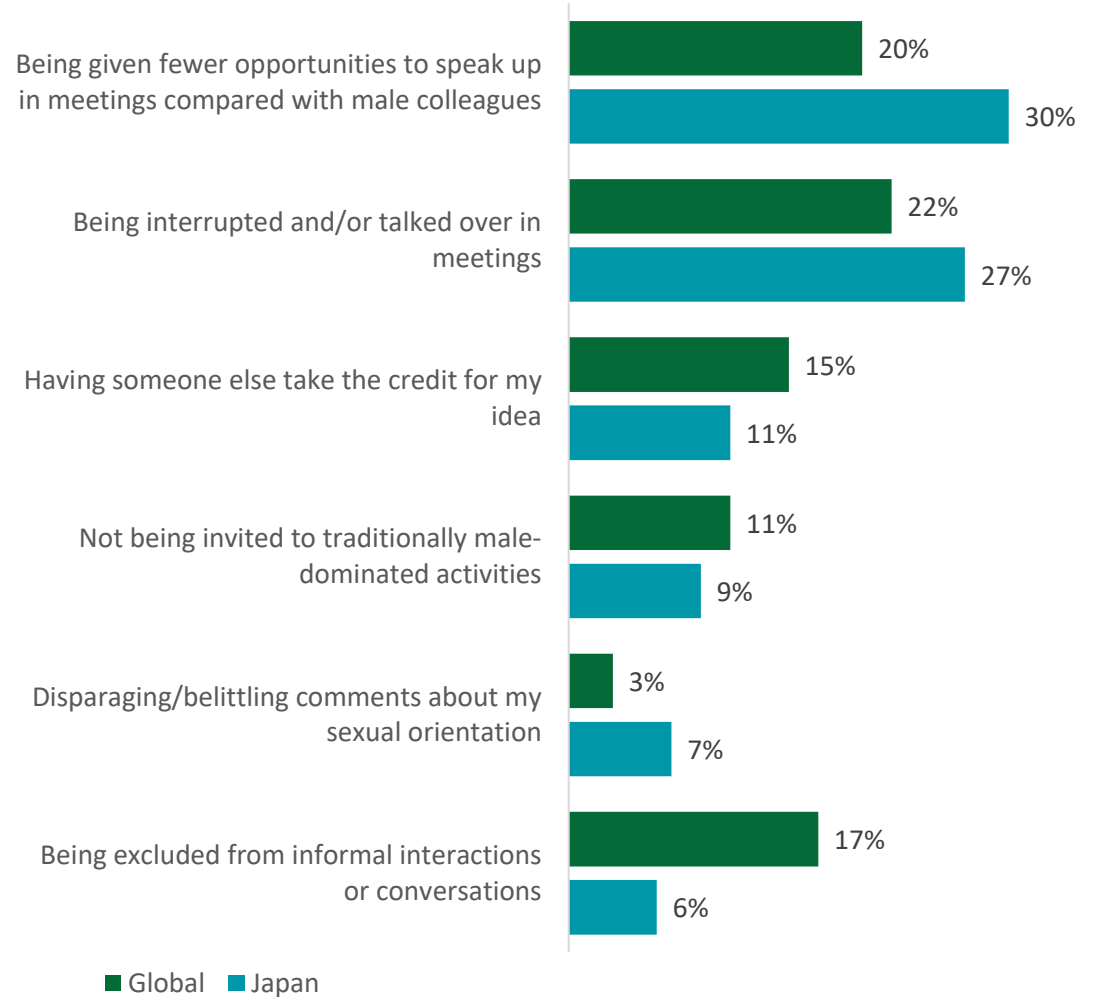
**12%**

I was concerned that the behavior would get worse

Base = 171



**Which of the following behaviors have you experienced over the past 12 months?**



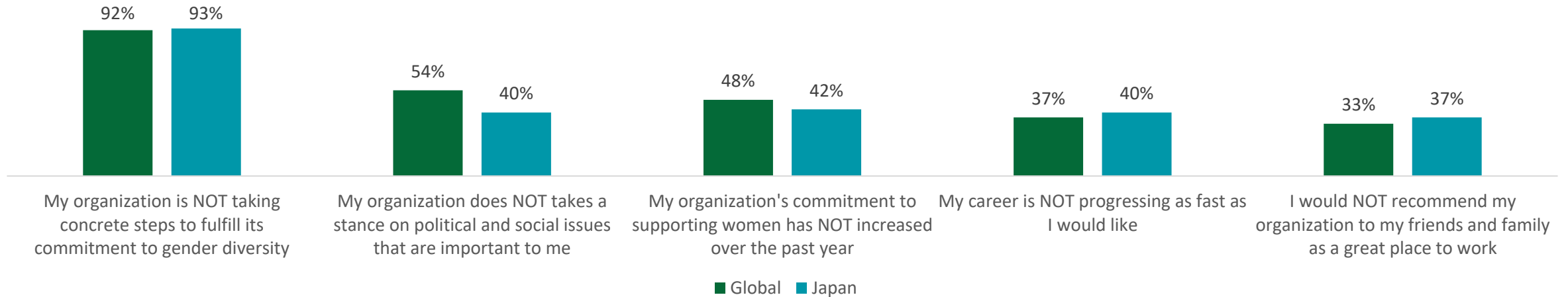
Base: Global= 2,212, Japan = 244

## Respondents say organizations are falling behind on commitments to gender equality

- Most women in Japan feel their organization is not taking concrete steps to fulfill its commitment to gender diversity. 42% say their organization's commitment to supporting women has not increased in the past year.
- More than a third of women in Japan would not recommend their organization as a great place to work, and 40% say their organization does not take a stance on political and social issues that are important to them.



**Which of these statements are true for you?**



Base: Global = 5,000, Japan = 500

# The Gender Equality Leaders are benefitting from doing it right

- Deloitte’s research identified a group of “Gender Equality Leaders,” organizations that, according to the women surveyed, have created genuinely inclusive cultures that support their careers, work/life balance, and foster inclusion. The proportion of women working for GELs is **5%** globally and **5%** in Japan.
- Additionally, we identified a group of “lagging” organizations. The women who work for these businesses indicate they have a less inclusive, low-trust culture. This year **24%** of global respondents and **26%** of Japanese respondents work for these Lagging organizations



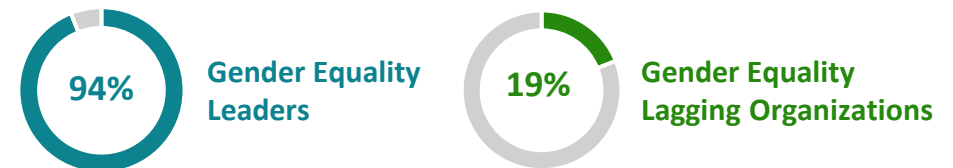
**How would you rate the following aspects of your life? (Global)**



**Which of these statements are true for you? (Global)**



**I would recommend my organization to my friends or family as a great place to work? (Global)**



Base: Gender equality leaders = 225, Gender equality lagging organizations = 1,189



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