

Survey on the Consciousness of Working People 2008

- Executive Summary -

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Background of Survey

NPO GEWEL has continued activities to support the promotion of Diversity & Inclusion in companies in order to realize an environment in corporations and in the Japanese society, so that companies and our society can become more creative by recognizing and accepting differences and similarities among individuals and respecting each one's values and abilities.

Recently the word "Diversity" has become widely recognized in Japan. However, do we really have a social or corporate environment in which each one's values and abilities are recognized and respected, and fully utilized?

Diversity is often considered synonymous to promoting women in organizations by some people. However, it is needless to say that by recognizing women's abilities and developing an environment in which they can fully utilize their talents is the first step for Japan toward Diversity & Inclusion when advancing business on an equal footing with the world. It is an absolute necessity in the 21st century economic environment in order to compete globally; therefore, it is Japanese society's one of the top priority issues.

However, is "promotion of women in the Japanese society or organization" making any progress in reality? According to "Gender Empowerment Measurement (GEM)" in the Human Development Report by the UN, Japan has dropped from 42nd rank out of 75 countries in 2006 to 54th rank out of 93 countries in 2007. A considerable number of companies has started activities to promote women to managerial positions by setting a goal for the number or ratio of female managers in the company and to support women to balance work and child-rearing in accordance with the "Policy for Nurturing the Next Generation. Regrettably, women involved in decision-making of the company or organization remains still at a very low level in the world. While support systems and measures have been improved, the number of women involved in decision-making is hardly increasing (middle managers: from 2.1% in 1988 to 3.6% in 2006, general managers: 1.2% in 1988 to 2.0% in 2006). Certainly, assistant managers have doubled to 10.5% in 19 years; however, considering the fact that 20 years have passed since the Equal Employment Act, it is nothing less than an overly slow progress. There must be some problem in this.

As GEWEL reviewed with those in charge of Diversity at companies the current status of promoting Diversity within the Japanese society, which is not making any expectant progress, we decided to conduct an awareness survey on Diversity & Inclusion for business people (including all working people). We received cooperation from 28 companies including foreign-affiliated companies in this survey. These companies have more than 2 years of experience in promoting Diversity or promoting women to managerial positions and seem to have higher awareness and understanding of Diversity & Inclusion. This key factor needs to be taken into account when interpreting the survey results. However, we believe that the awareness and reality of business people made open and clear in this survey can be applied to our society at large.

Acknowledging Issues and Hypothesis

The expression of Diversity or Diversity & Inclusion has been taken up in the media and in the Japanese society for the last few years. However, is it really making any progress? In the last five years, GEWEL has provided various support to corporations promoting Diversity and information through symposiums so that Diversity & Inclusion would take root in the Japanese society.

We have conducted a research survey titled “Consciousness of Working Women” twice in the past to fully understand women’s attitude toward career advancement, exploring the changes in women’s awareness. This is the first time the survey was **targeted to include men** in order to understand the differences in consciousness between men and women when promoting Diversity as a reality in the workplace.

We wanted to acquire sufficient data for our hypothesis that Diversity is not only an issue of the difference in gender but has relevance to various perspectives as age and type of employment. We thought by proving that “promotion of Diversity = promotion of women to managerial positions” could not achieve the objective of realizing an environment that is truly Diversity & Inclusion. We were able to acquire massive data including free-answers of over 10,000 business people. In this report, we will focus on **1) Issues in promoting Diversity & Inclusion** and **2) awareness of business people (level of work satisfaction and self-evaluation)** in this first report.

In the future, we would like to analyze this valuable data in details and continue to provide recommendations to promote Diversity & Inclusion.

Highlights of Survey Results

Outline of Survey

Survey Respondents: Business people (Men/Women)

Valid number of respondents: 10,357

Survey Methodology: Anonymous self-administered questionnaire through the Internet

Survey Period: August 29th, 2008 (Fri.) to October 17th, 2008 (Fri.)

Survey Field-Work Agency: UTIL Inc.

Funding Cooperation: Accenture Inc.

Issues in Promoting Diversity & Inclusion

We believe that promoting Diversity is one of the business challenges of creating the organizational culture that allows employees to fully utilize their abilities, grow, and work enthusiastically by being recognized for their contribution and achieving profit targets. Like all other business challenges, it is essential to have employees who think Diversity is beneficial to corporate performance and execute the strategies actively.

- ◆ According to the survey, those who belong to “segment positive with active participation” accounted for 44% of all respondents. (no significant difference among gender and age groups)
(※ Positive: Diversity and enhanced performance are correlated / Active participation: want to practice Diversity actively.)
 - The “segment positive with active participation” had greater motivation towards their work and loyalty to their companies. They are enthusiastic employees with high self-evaluation.
 - The issue is to understand and resolve problems that are preventing the “segment negative with passive participation” (34%) from becoming “segment positive with active participation”.
- ◆ The key is understanding of Inclusion ⇒ People become more proactive by accepting themselves, and being “recognized” and “accepted” by others!

- It implies that developing support systems may be important, but before that, creating a work environment and culture in which each one is respected and supported on his/her growth and can participate in achieving the goals of the company is more important.

Attitude toward Working (Level of Work Satisfaction and Self-evaluation)

- ◆ Business people are dissatisfied with “not being able to see a clear path to achieve advancement in their career and insufficient support system to advance their career plan at the current company.”
 - In reality, it seems that employees are not actually feeling the benefits of the company’s human resource development programs.
 - Whether or not the company must help each of its employees to establish autonomy or how the company can foster employees so that they become self-independent and be able to discipline themselves are emerging problems.
- ◆ The consciousness of continuing work and wishing to be part of management among the young men and women was very different from the understanding at the management level.
- ◆ It seems that one of the causes of advancing women into management is so slow is “the lack of confidence of women in their work due to the way women have been trained in the past and negative evaluation concerning the workplace culture among young women.”
- ◆ It implies that developing a work environment and culture that respects each other and values each one’s life is more important than creating infra-structural systems!

The Steps Going Forward

Based on this survey, GEWEL will continue its activities such as execution of qualitative research on the following themes.

1. **The big picture could be seen from this survey; however, further analysis of the issues / problems that were not sufficiently explored would require detailed analysis of the free-answers by conducting cross analysis.**
 - (a) **What is work environment and culture in which employees feel they are recognized?**
 - (b) **What types of “unconscious bias” are there in the workplace?**
 - (c) **What are the profiles of the “segment negative with passive participation”?**
2. **Going in-depth to understand the consciousness of those in the 20’s in terms of how they think about continuing work, loyalty to the company, and career advancement.**
3. **Analysis on the real intention of “women who resigned” as a way to explore women’s consciousness for continuing to work.**
4. **Study on concrete examples of developing an inclusive work climate: why and in what situation do people feel or don’t feel they are “recognized/accepted”**

Through these researches and activities, GEWEL would like to propose further direction and measures to create an inclusive work environment/culture.

We would appreciate your continued support and guidance to us.

Summary of Survey Results

PART 1 : Issues in Promoting Diversity & Inclusion

I. Current Status and Understanding of Diversity Promotion in the Workplace

◆ Awareness of Diversity in the Workplace

- ✓ Awareness of the word “Diversity” among the companies participated in the survey ⇒ 84%
 - However, those who know its full meaning ⇒ 52%
- ✓ Women, who are currently regarded to be the actual targets, showed less awareness than men. 20% of women and 13% of men said that they had never heard about Diversity and did not know what it meant. (Significant difference between men and women.)

◆ Men and management are more positive to the current status of Diversity in the workplace than women.

- ✓ There is a culture of respecting each other as a professional regardless of gender. (Men: 56% vs. Women: 47%)
- ✓ There is a culture in which one’s opinion can be expressed regardless of age. (Men: 58% vs. Women: 51%)
- ✓ There is a culture in which everyone is respected as a team member regardless of the type of employment. (Men: 46% vs. Women: 38%)
(The above comparison of the percentages have significant differences with reliability of over 95%.)

◆ Ranking of important items for promoting Diversity in the workplace was measured. “Increasing female managers” ranked 8th out of 15 items. While 27% of women selected this item as an important concern, only 19% of men chose it. The top ranking items are;

- ✓ “Provide equal opportunities for promotion to all competent employees irrespective of their educational and employment background” ranked at the top for men (55%).
- ✓ For women, “review work practices and reduce overtime to promote a balance between work and personal life.” (56%) ranked at the top, and “increase the retention of employees by facilitating the use of available support programs for those with care-giving responsibilities, such as a leave of absence and shorter work hours” (55%) ranked 2nd, and “provide equal opportunities for promotion to all competent employees irrespective of their educational and employment background” ranked 3rd.

[Challenges]

- ◆ *Women showed a relatively lower awareness on Diversity. However, being asked about the current situation in the workplace, many expressed their dissatisfaction. It seems that promotion of Diversity is not connected to realistic issues in the workplace.*
- ◆ *For women, work environment that provides easy access to support systems for child – raising is more important than equal opportunity. Are they feeling an atmosphere which is not open so they find it difficult to work ?!*

II. Understanding for Promoting Diversity & Inclusion and Willingness to Practice

Based on the level of agreement between the correlation of Diversity and company performance and

level of willingness to practice Diversity, the following four segments were categorized.

- Segment positive with active participation (Leading group to promote Diversity)
- Segment negative but active participation (they are not sure whether Diversity enhances performance, but they think they have no choice but to follow the company’s policy.)
- Segment positive but passive participation group (They agree that Diversity enhances performance, but they are not willing to practice it personally)
- Segment negative with passive participation group (They don’t agree that Diversity enhances performance and they have no intention to practice it.)



The good news is that 44% belong to the segment positive with active participation, but 34% also belong to the segment negative with passive participation. It is important to increase the segment positive with active participation by further hearing of their doubts and dissatisfaction from the segment negative with passive participation concerning Diversity and obtaining their understanding.

Differences by attribute are as follows:

Gender:	No significant difference between men and women
Age:	No significant difference by age
Management vs. General employees:	51% of management belongs to the segment positive with active participation (43% for general employees)
Overseas experience:	51% of those with oversea experience for one year and more belong to the segment positive with active participation.
Organization or company:	“Segment positive with active participation” ⇒ Japanese companies: 43% vs. Foreign-affiliated companies: 46%
Type of employment:	“Segment positive with active participation” ⇒ Full-time employees: 45% vs. Others: 37%
Enrollment process:	“Segment positive with active participation” ⇒ Employed as new graduates: 43% vs. Mid-career: 46%

[Challenges]

Just because they are women, it does not mean they belong to the “segment positive with active participation”. Willingness to promote Diversity by the management regarded in the past as the “clay layer” middle management seems to be surprisingly higher. They seem to understand theoretically the meaning of Diversity due to drastic changes in the business environment. (Does this show the effectiveness of study?) One of the keys for understanding Diversity as something that consciously applies to themselves could be from having overseas experience, mid-career change, or encountering successful examples of Diversity & Inclusion. Reducing the number of “indifferent layer” may be the key to successfully promote Diversity in the company.

III. Profiles of Positive and Active Participant Segment in Promoting Diversity & Inclusion

Segment Positive with active participation:

- Seeks challenges in the job as objective to work and wants to continue working until retirement.
- Wants to manage work and child-rearing.
- Positive about own abilities with high self-evaluation and wants to be part of management.
- **Has the highest work satisfaction level and feels they are recognized in the workplace!**

[Challenges]

Increasing the number of “segment positive with active participation” means the increased number of employees, who has greater work satisfaction level and motivation to continue working, which creates an enthusiastic workplace. How can we achieve that?

IV. Moving toward Inclusion beyond Diversity

In this survey, we asked the question “to what extent do you feel your presence and abilities are recognized by your bosses and colleagues?” as an indication of Inclusion.

We will study further which is the appropriate word for Inclusion in the Japanese language: “recognized” or “accepted”, or if there is a better Japanese word for it. However, we believe that the answers to this question provide us with some key factors to increase the segment positive with active participation.

The segment positive with active participation showed a higher percentage than the other groups in “feel recognized.”

	Much recognized	Mostly recognized	Can't say either	Don't feel much recognized	Don't feel recognized at all
Overall	9%	43%	34%	10%	4%
Positive with active participation	11%	47%	31%	9%	3%
Negative but active participation	9%	43%	34%	10%	3%
Positive but passive participation	8%	38%	36%	14%	4%
Negative with passive participation	7%	39%	39%	11%	5%

If “much recognized” and “mostly recognized” are added, the percentages by age for both men and women are as follows:

	Men	Women
Overall	54%	51%
20's	41%	44%
30's	53%	53%
40's	61%	57%
50's	59%	60%

Some may think that those in the 20's are too young to be recognized, but is an organization that does not recognize young people an attractive organization?

The fact that women in the 40's showed a lower level of being recognized may be caused from difference in work assignment with men and having lesser opportunities to grow in the organization.

Then, when do business people feel they are recognized? Predominantly many respondents selected “good performance evaluation/being assigned to an important job/ delivering the results” as the factors. However, we found through free-answer questions that communication and human relationship are also important factors.

[Challenges]

People become proactive when they feel recognized by others. In this survey, there was not much difference between men and women, but men considered themselves part of the organization when they thought about what kind of job they were assigned to or evaluated (good or bad). On the other hand, women may have lowered their self-evaluation because of their bosses “not having high expectation of them or not being assigned to an important job,” etc. Some answered as not being recognized when there was “no greeting or ignores my greeting” in the free-answer question. We believe that behaviors recognizing the existence of each other, such as greeting and talking to each other, would be ways to increase the number of “segment positive with active participation.”

PART 2: Attitude toward Working (Level of Satisfaction and Self-evaluation)

I. Purpose of Working and Continuing to Work

As for the purpose of working, “to make a living” accounted for the highest percentage (45%), “to work in the industry I find interesting/enjoyable” (20%), and “to do the kind of job I want to do” (12%). 48% of women, a significantly higher percentage than men, answered “to make a living” as the purpose of working, showing their increased financial responsibility. This may be due to various factors such as tendency to marry later or an economic environment that is inevitable for women to work. However, we strongly hope that they can work enthusiastically in the company.

Those who want to work until retirement in their current company or regardless of their current company accounted for 71% for men and 42% for women. Many women (39%) answered that they would continue to work for the time being, but they didn’t know in the future. The image of women is described who think, “I have to earn an income to maintain the household but how long do I need to keep working?”

It is striking that 35% of men and 41% of women in the 20’s answered that they would continue to work for the time being, but they didn’t know in the future. It is said that this so-called “Generation Y” in the U.S.A. who became teenagers in 1990’s think only of two or three years into the future. Are Japanese young people also unable to have a dream for the future? Only 12% of men (4% of women) in the 20’s answered that they wanted to work until retirement at the current company, which shows a very different way of thinking from the previous generations. However, it is also presumed that the tendency for stability-orientated may increase under the recent economic crisis.

[Challenges]

Do the facts that “young people quit in three years” or “half of female employees quit within five to seven years” reflect such feelings of young people? What kind of workplace is attractive and worth working for the younger generation? We will continue to analyze on these points in the future.

II. Aiming for Management Roles

A clear difference between men and women was shown in aiming for management roles. Similarly in our past surveys (in 2004 and 2006), only 20% of women in the 20’s and 30’s said that they wanted to be part of management and 33% to 37% of them insisted that they did not want to be part of management. If 10% out of 40% of them, who answered, “can’t say either” stayed with the company fully enjoying being assigned to a responsible, important position or experiencing the sense of achievement, female management will increase in the future. To that end, it is important for these women to think “what they want to do voluntarily by taking their own initiative.”

35% of men in the 20’s said that they would continue to work, but they “didn’t know in the future.” However, those who wanted to become part of management accounted for 61%. Is this because “they are men”? In this respect, division of roles between men and women in the company seems to be still well established. However, 37% of men in the youngest age bracket said that they did not want to be part of management or they could not say either. The communication gap that occurs between those in management, who think “It’s natural for men to want to become part of management” and the younger generation of men seem unavoidable.

[Challenges]

Men seem naturally capable of imagining themselves to become part of the management in the future, but women who can imagine like men are still in the minority. Companies are

focusing to improve support systems for child care as they are hoping that their female employees would work for longer years and become part of management. However, young women are sensing a work environment and culture, which do not allow them to trust completely in the “improvement of support systems”. They may be having difficulties imagining themselves positively working for longer years as they hear negative comments on women, who are managing work and child care in their daily conversation.

Career advancement does not only mean becoming part of management. 19% of men in the 20’s prefer to become a specialist, saying “I prefer working alone.” Although we are not sure if this is a recent change in men as annual research for men are not available, we hope that companies and management would realize that individual values are clearly becoming diverse in the workplace .

III. Self-Esteem

GEWEL believes that the foundation of Diversity is based on the acknowledgement that each individual has a vision about his/her way of life and think of himself/herself as a human being worth being born and respected (= to have high-self-esteem) and recognize others too as human beings worth being born and to be respected. This emotion of “affirming one’s own existence and having respect for oneself” is called “self-esteem.” The fundamental of Diversity promotion is for people with high self-esteem to recognize similarities and differences among each other (Diversity) and to create new values by accepting them and to contribute to the goals of the organization (Inclusion).

This time, we asked respondents if they agree or did not agree (yes, no, don’t know) to the following questions in order to comprehend the level of self-esteem. The table below lists the items in the order of highest percentages for “Yes.”

	Overall	Men	Women
Making efforts in my own way to become more capable at work.	88%	89%	87%
I think I am contributing in my own way to the current organization.	69%	74%	63%
I have a dream that I want to achieve in my life	64%	69%	59%
I am confident with my ability on the job	46%	55%	35%
I think my abilities are marketable at other companies.	43%	53%	31%
I want to utilize my ability not only in Japan but also globally.	37%	42%	31%
I am satisfied with the way I am.	20%	21%	19%
I envision a clear path for future career advancement.	19%	24%	13%

Women tend to have lower self-esteem than men. We hear that “women have better scores than men for examinations at universities or employment examinations” from staff of recruitment companies. Then, why cannot women have high self-esteem in companies, too? Especially, about 30% to 50% of women answered “they didn’t know” on questions especially on “self-confidence with their ability on the job” and “marketability at other companies.” It seems that they are not recognized by their bosses and colleagues nor expected to do well or assigned to jobs, which could give them confidence.

Although both men and women express they are not satisfied currently with themselves, this may be just characteristics specific to the Japanese for being modest or striving to improve themselves. There is a problem that “they don’t see a clear path for their own career advancement.” They say “they have a dream” but seem not to find the concrete path to achieve it, or they are considering that “having a dream in life” and “path for career advancement” are two separate things. We wish to analyze further these points in-depth.

[Challenge]

We believe the fact there is a correlation with women’s lower self-evaluation on their job

compared to men and how women are fostered and trained in the company. Even if women had the same dream and hope as men when they entered companies as new graduates fresh out of school, they start thinking a few years later that “something is wrong.” Among such women, some would leave the company to get a MBA abroad to advance their careers. Do companies really pay attention to each woman’s abilities and train each individually? We can not help but think that awareness towards “work and roles of female employees” by management or human resource development in companies has not changed much after 20 years, since the Equal Employment Act. The true promotion of women is to recognize them as equal partners in the job and foster them from the same viewpoint as men, rather than providing support for childcare or support for managing work and childcare. In addition, how the company or boss gives advice to each employee including men concerning his/her career path is another issue for the future. Don’t most people in Japan think that their career is supposed to be decided by the company?

IV. Work Satisfaction

Over half of both men and women (57% for men and 53% for women) answered that they were satisfied with their work overall. Only 19% of both men and women expressed clear dissatisfaction. It seems that most people are satisfied with their work. Unexpectedly, 50% of men and 54% of women are satisfied with work-life balance and 29% of men and 25% of women felt dissatisfied. It seems satisfaction level is high despite “long working hours” which have been pointed out socially.

Those who expressed dissatisfaction concerning accessibility to child care leave or shorter working hours were 20% for both men and women. Though we do not have the details unless cross analysis is done, most participants in the survey this time did not express much dissatisfaction. This is one of the key points we would like to explore through a qualitative research in the future.

One point that we are concerned is that here again the satisfaction level was low for “arrangements to support employees’ career development.” Aren’t the employees aware themselves concerning the company’s attitude of having human resources training for the employees and supporting their life plan? Perhaps, career planning is not being discussed at the time of performance evaluation interview with the management. At the same time, it is also important for the employees to realize that they need to become self-independent person who are capable of judgment, decision, and action on their own as the future style of businessperson.

Regarding inequality between men and women, women still feel that “men are more privileged” (Male: 23% vs. Female: 42%). As the age advances to the 40’s and 50’s, more women think “men are more privileged,” which is understandable from the difference in promotion and treatment in the company. However, there is a concern to see that 34% of the women in the 20’s also think that “men are more privileged” and less than half of the women in the 20’s think that men and women are equal. (Definite analysis on women pursuing main career track and women doing clerical work is required.)

Interestingly, 19% of men in the 20’s think that “women are more privileged.” In free-answer questions, excessive promotion of women was criticized by both men and women. We think the time has come to clearly acknowledge the difference in meaning between equality and fairness in promoting Diversity & Inclusion as a whole.

We believe the time has come to transition into a company or workplace, where each individual’s abilities are fully utilized rather than being concerned by the differences between men and women.

By age bracket for women, women in the 20’s are feeling most strongly that “there is an atmosphere of difficulty to work after marriage or childbirth for women.” Although many companies that participated in the survey have developed the support systems or measures for women to continue to work, young women may be seeing or hearing the phenomena that are different from the “company’s official view” and

feeling the harsh realities for women with child care in the workplace. Companies that lose female employees before they reach 30 years old need to come to terms with the reality of their workplace on this point.

[Challenges]

We need to study further how we should evaluate the work satisfaction level of 50% from the perspective of “employee satisfaction level” in a company. We believe the ideal environment is one that the employees “empathize with the vision and mission of the organization and want to contribute to the growth of this organization.” However, this figure of 50% includes those who settle for the current status quo due to the severe economic and employment situation. We would like to research further if they want to utilize their abilities to the fullest. Issues concerning the differences between men and women still exist, but GEWEL believe it is now the time to discuss about individual life stages and respecting values rather than the distinction between gender and age. It is vital to establish an inclusive workplace where each one’s way of life and values are respected.

V. Role Models

Lack of role models is often pointed out as a reason for women not wanting to be part of management. Companies, NPOs, and organizations that support promotion of women have introduced role models through various events.

Those who answered that “they had a role model” accounted for 41% among men and 35% among women. Clearly, men seem to have more role models than women. However, men who answered that “they could not find a role model” accounted for 25%, which is significantly less than women at 29%, but showed that one out of four men does not have a role model.

We will analyze further concerning the intention to become part of management and existence of role models, since it seems that the problem of lack of role models is not only among women. What kind of person you would like to have as a role model is the key, and it appears that there is a lack of individual’s sense of personal initiative.

[Challenges]

It is necessary to clarify how you want to live or from whom you want to learn without using the lack of role models as an excuse. It is important to make way for time to think about one’s own life. It is also a top priority for companies to give such time to their employees.