

march 2024

japan.

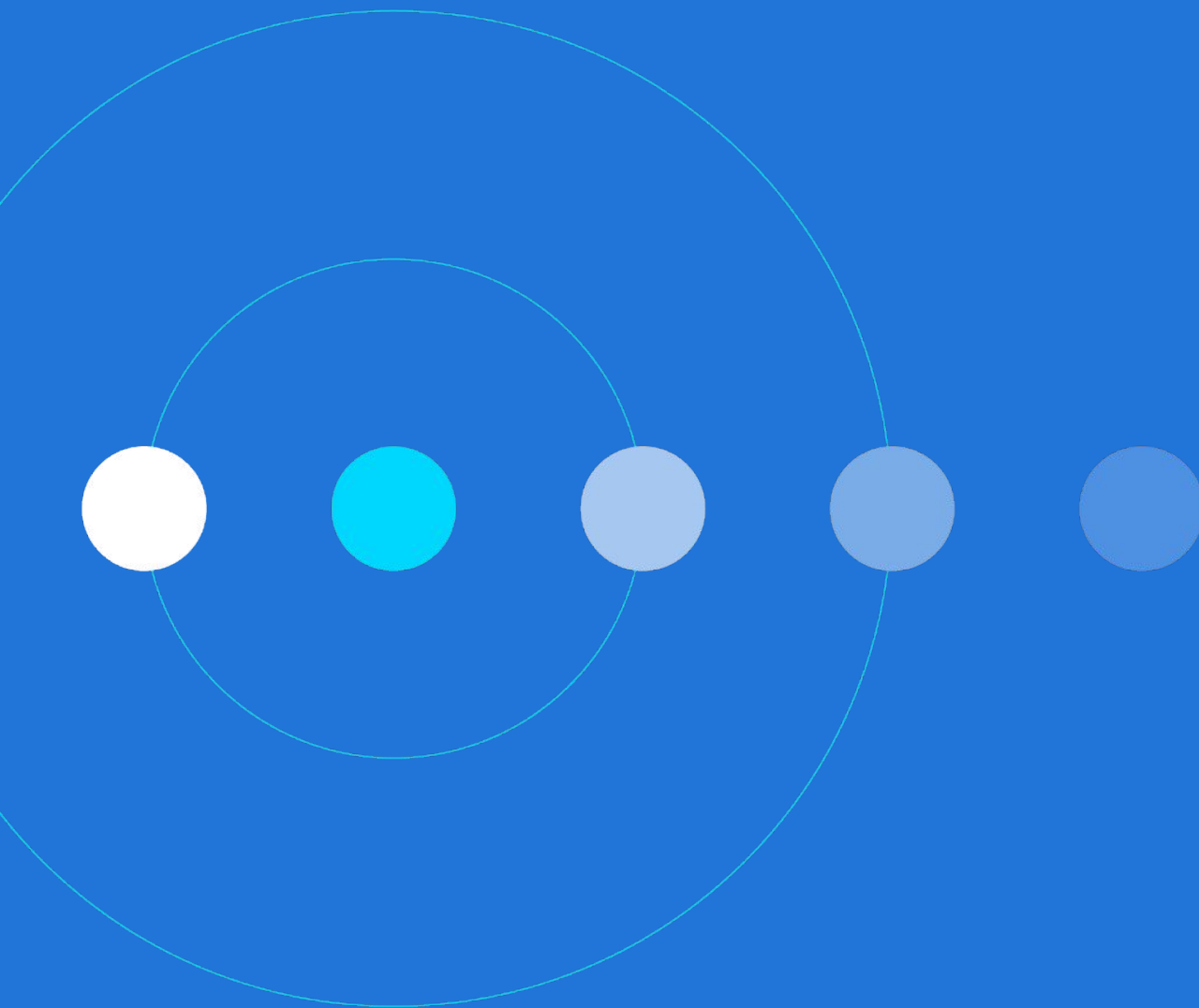
country report employer
brand research 2024



randstad



partner for talent.



- 3 introduction
- 10 key drivers
- 13 top sectors
- 19 job-switching behaviour
- 28 annual topics: equity and AI

introduction.



what is the randstad employer brand research?

- A representative employer brand research based on perceptions of the general audience. Optimizing 24 years of successful employer branding insights.
- An independent survey with nearly 173,000 respondents and 6,084 companies surveyed worldwide.
- A reflection of employer attractiveness for this market's largest employers known by at least 10% of the population.
- Provides valuable insights to help employers shape their employer brand.

173,000
respondents



32 markets surveyed covering more than 75% of the global economy.

sample

- aged 18 to retirement age representative on gender overrepresentation of age 25 – 44 comprised of students, employed and unemployed workforce

fieldwork

- online interviews
- january 2024

length of interview

- 14 minutes

sample country

- japan, 5819



argentina
australia
austria
belgium
brazil
canada
china

czech republic
france
germany
greece
hong kong SAR
hungary
india

italy
japan
luxembourg
malaysia
mexico
the netherlands
new zealand

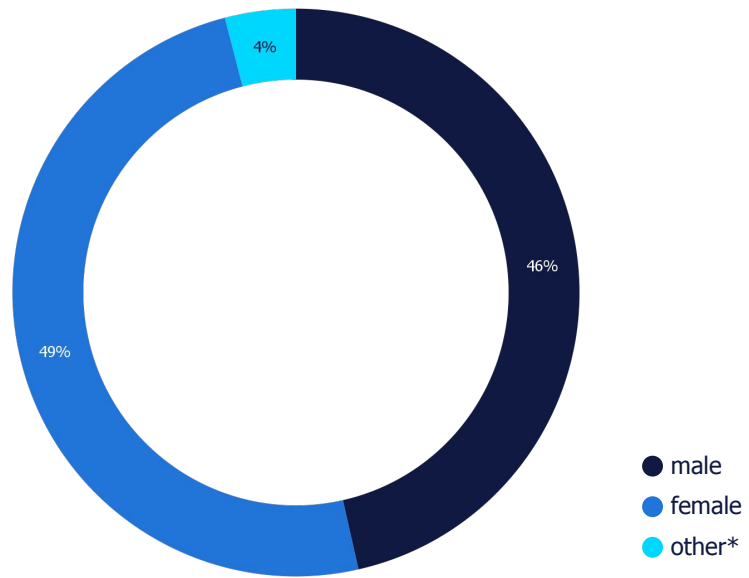
norway
poland
portugal
romania
singapore
spain
sweden

switzerland
united kingdom
united states
uruguay

sample composition in japan.

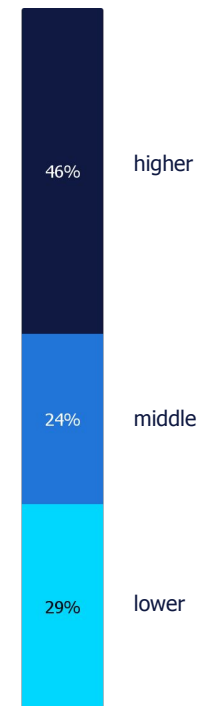
socio-demographics, education, region

gender

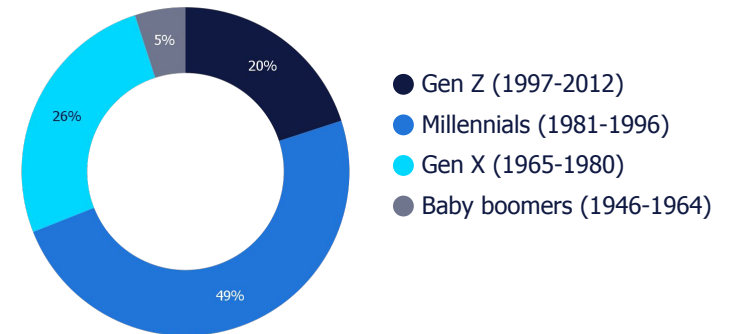


* other is comprised of non-binary, intersex, transgender man, transgender woman, gender non-conforming, gender fluid, other gender identities not listed above and people who prefer not to answer the question

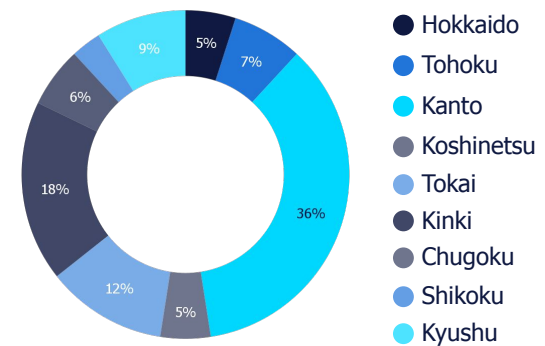
education



age



region



executive summary: key takeaways.



evp drivers

The wants/needs of Japanese employees have remained consistent over the past two years, indicating stability in their priorities. While offering attractive salary and benefits remains the primary motivator when selecting a new employer, a pleasant work atmosphere closely follows suit.

Japanese employers excel in meeting the expectations of their workers across most of the core aspects of the ideal employer profile, with the exception of salary and benefits where the disparity between ideal and current employer is still fairly large. However, this is mainly positive for employers as reaching the expectations in terms of monetary benefits will always be challenging, especially in the short term. By prioritizing non-material benefits, employers can effectively enhance workplace satisfaction and implement improvements more swiftly. Employers should bear this in mind when discussing compensation packages with their workers, be it at group or individual level.



job switching

While the switching behavior of Japanese workers remains relatively low compared to other markets, it does demonstrate a significant upward trend. It has now returned to pre-pandemic levels, which is a development that employers cannot afford to ignore.

The discrepancy between inadequate compensation and increasing living costs, along with the aspiration for a better work-life balance, significantly impact employees' considerations regarding whether to leave their current employment. However, simply providing inflation compensation is inadequate in retaining employees, as their inclination to switch roles remains unaffected by whether they receive it or not.

A better work-life balance is especially relevant for millennials and is something that employers should take into consideration when sitting with their millennial employees or potential new employees of this generation.

executive summary: key takeaways.



equity

Around one in five Japanese workers identify themselves as part of a minority group, whether it be due to their gender, sexual orientation, ethnicity/nationality, religion, disability or another defining characteristic. Like in other markets, it is the younger generations who tend to identify as part of a minority group more commonly, with Gen Z being the most inclined to identify as such.

Members of minority groups do not rate their employer differently when it comes to equal treatment in the workplace. With this said, when it comes to facing obstacles in career progression, minorities do witness this twice as often as others. Employers need to pay attention to this.

Employers do have significant room for improvement in terms of all equity across all demographics. They should not overlook the fact that just one in three employees feel they are treated in an equitable way, particularly considering that equity narrowly misses securing a top 5 spot in the ideal employer profile.



artificial intelligence

So far one in ten Japanese employees uses AI in the workplace on a regular basis; even more so amongst the high educated where one in six claim to do so.

While only 4% of the workforce is already directly impacted by AI in the workplace, the anticipation of AI's impact in the foreseeable future is increasingly more widespread. Around half of all workers expect AI to affect their job at least in some kind in the next 5 years, with this expectation particularly prevalent among those already using AI in their role.

The expected influence of AI on their job role is mostly positive, in fact only 7% hold negative opinions. With this said, there is an overwhelming majority who are currently apathetic towards its impact. Employers may want to monitor these employees to ensure that any introduction of AI is well-received. This proactive approach ensures that the introduction of AI is met with positivity and that the neutral employees do not change to negative perspectives and outweigh positive sentiment.

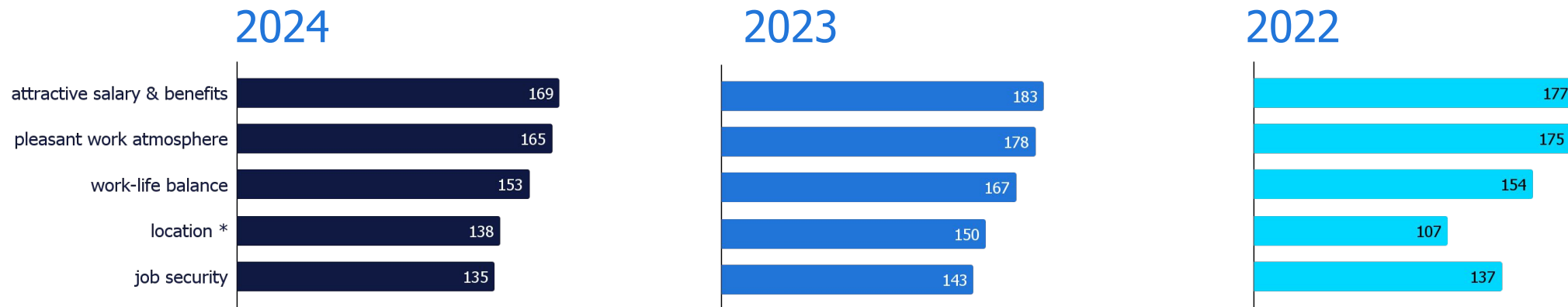
key drivers.



what potential employees want.

the 5 most important drivers when choosing an employer

The hierarchy of the top drivers remains the same as last year. The desire for work-life balance is particularly prominent among women and individuals with higher education levels. Conversely, job security is less of a priority for Gen Z, whereas Baby Boomers place more value on this aspect than the other generations.



* japanese translation updated in 2023 from “convenient place to work” to “workplace is located conveniently”

how to read the above indexed scores:
150: driver is chosen 50% more often than the average driver to be important
75: driver is chosen 25% less often than the average driver to be important

perception of employer offer in japan.

Understanding the gap between what employees want and what they think employers offer provides valuable insights into building an employer brand. Furthermore, benchmarking against what employees perceive being offered by their current employer gives more context to the gaps that need to be bridged

evaluation of current employer

1. is conveniently located
2. long-term job security
3. work-life balance
4. pleasant work atmosphere
5. financially healthy
6. very good reputation
7. interesting job content
8. attractive salary & benefits
9. career progression
10. gives back to society

profile of ideal employer

1. attractive salary & benefits
2. pleasant work atmosphere
3. work-life balance
4. is conveniently located
5. job security
6. equity
7. financially healthy
8. strong management
9. possibility to work remotely/from home
10. career progression

current employer offer closely aligns with that of ideal employer

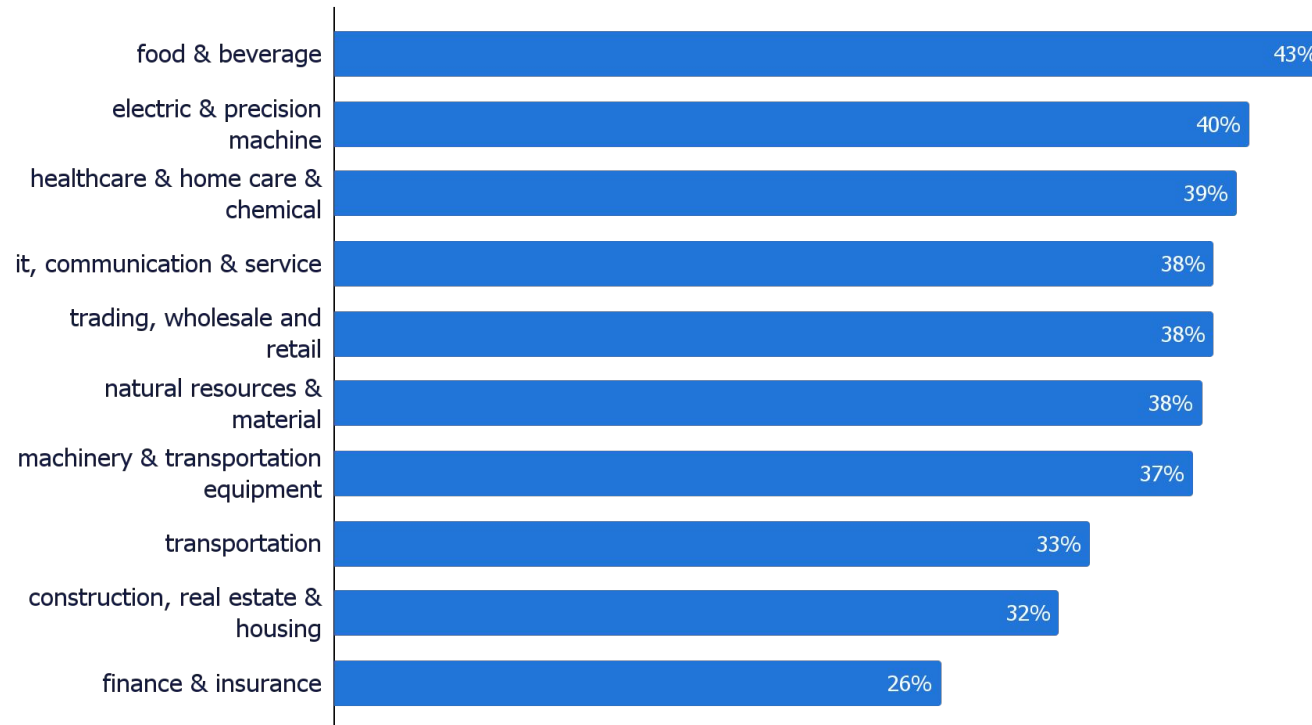
4 out of the 5 of the top priorities for workers are being met or exceeded by their current employer. However, there is a significant gap in terms of salary & benefits, as only 1 in 3 workers rate their employer positively. With this said, GenZ do show a more positive outlook compared to Boomers, though they are more positive about their employers overall.

top sector insights.



sector attractiveness.

top 10 best performing sectors



The food & beverage industry remains the most attractive sector to work for in Japan.

Driven by three major companies which were also evaluated highly individually, the food and beverage sector ranked first again this year.

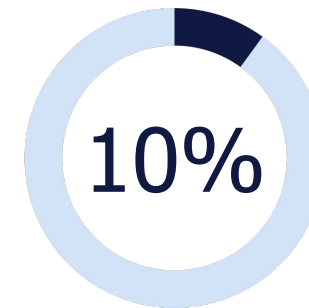
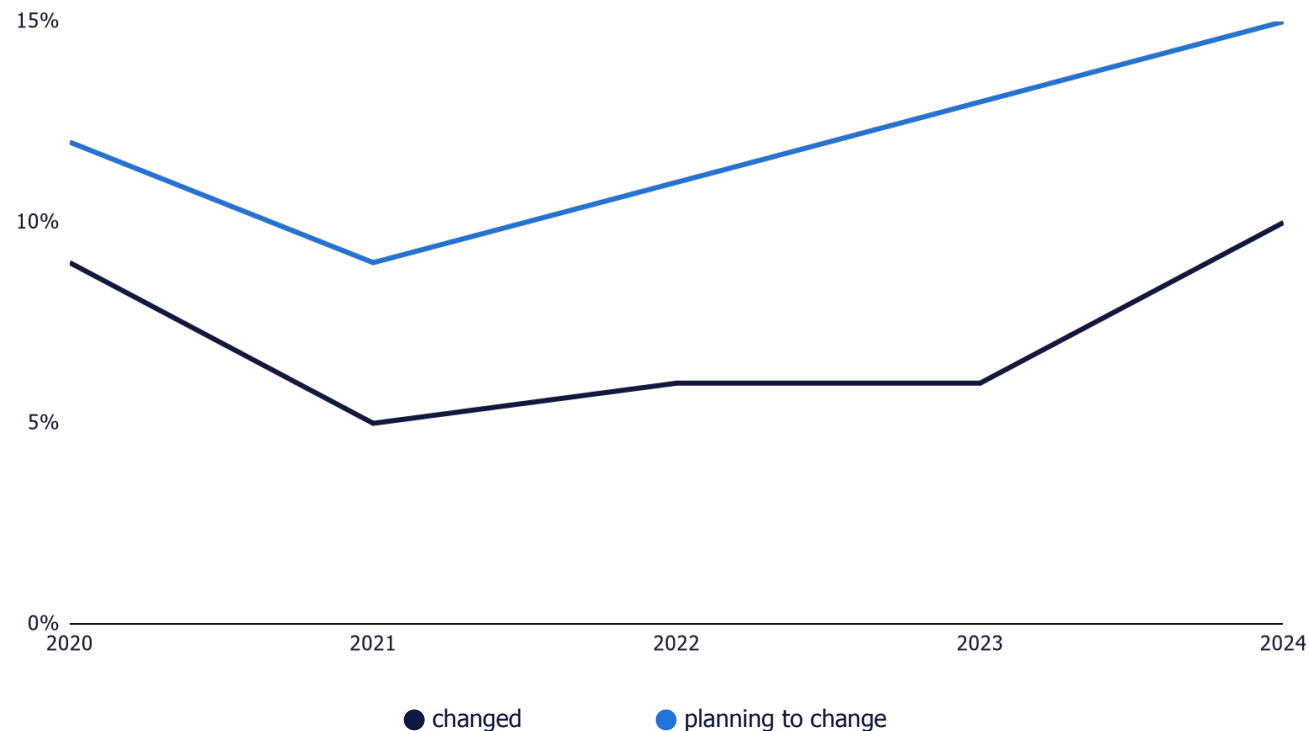
The differences in attractiveness between all other sectors are small, meaning that employers compete not only within their own sector but also with multiple other sectors when it comes to attracting talent. Financial services is the only category that faces increased competition due to its relatively lower attractiveness.

job-switching behaviour in focus.

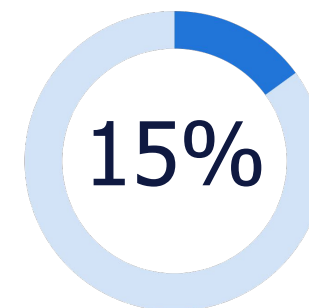


switching behaviour over time.

There is an unparalleled jump in labor market volatility as 10% changed employer in the past 6 months (+6% 2023), thus surpassing pre-pandemic levels. Similarly, the intention to switch in the next 6 months stands at 15%, indicating a continuation of a trend that emerged after the COVID pandemic.



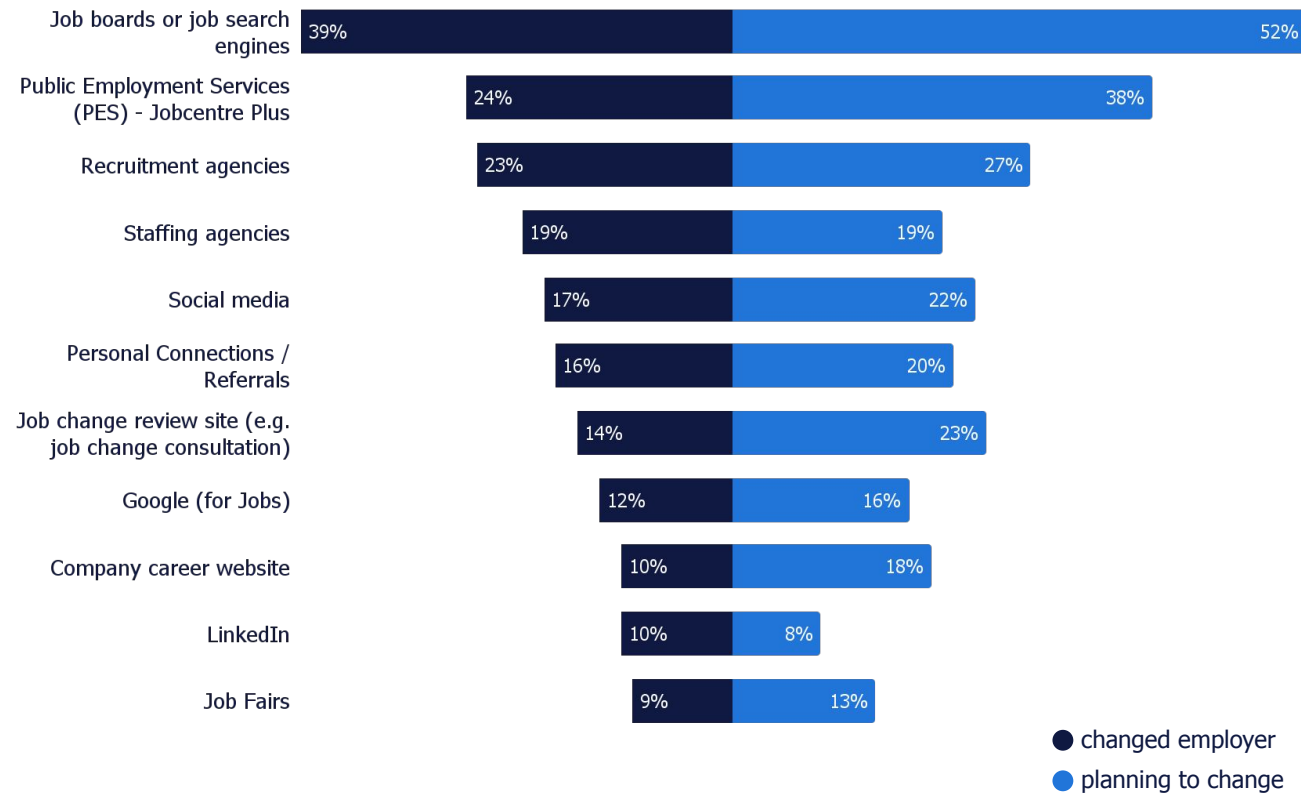
have changed
employer in the last
6 months



is planning to
change jobs within
the next 6 months

how employees in japan find new job opportunities.

sources for job opportunities



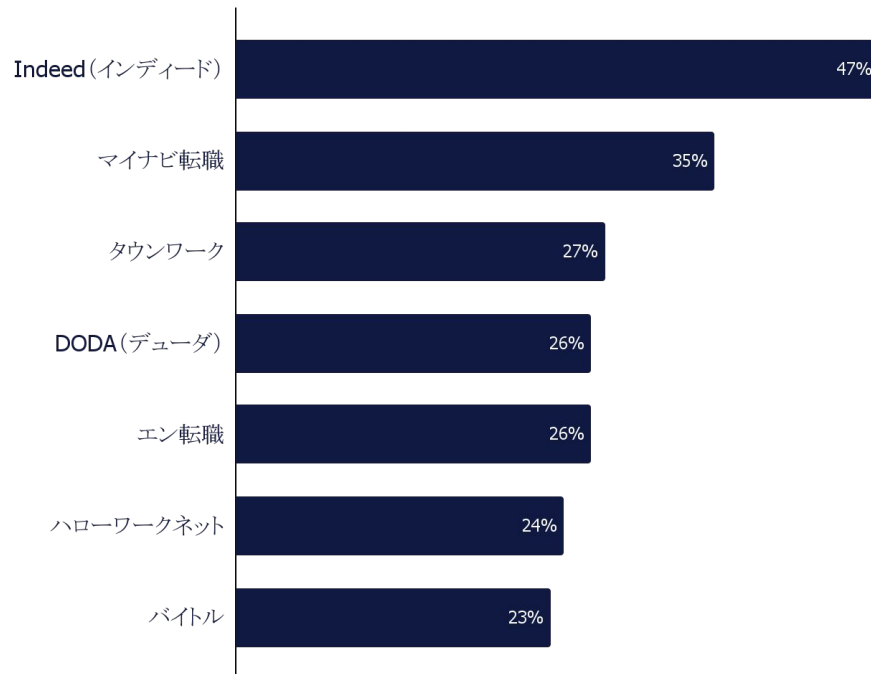
Job boards/search engines have the highest reach among job seekers, regardless of profile.

Moreover they have the highest success rate as about 80% of their users find their job that way (39% of 52%). The success rate of recruitment and staffing agencies is actually even higher as almost all of the switchers that used these channels thus found their new employer. The reach of Public Employment Services is second to that of search engines, though far from as productive. Gen X is using this channel more than others when looking for a job.

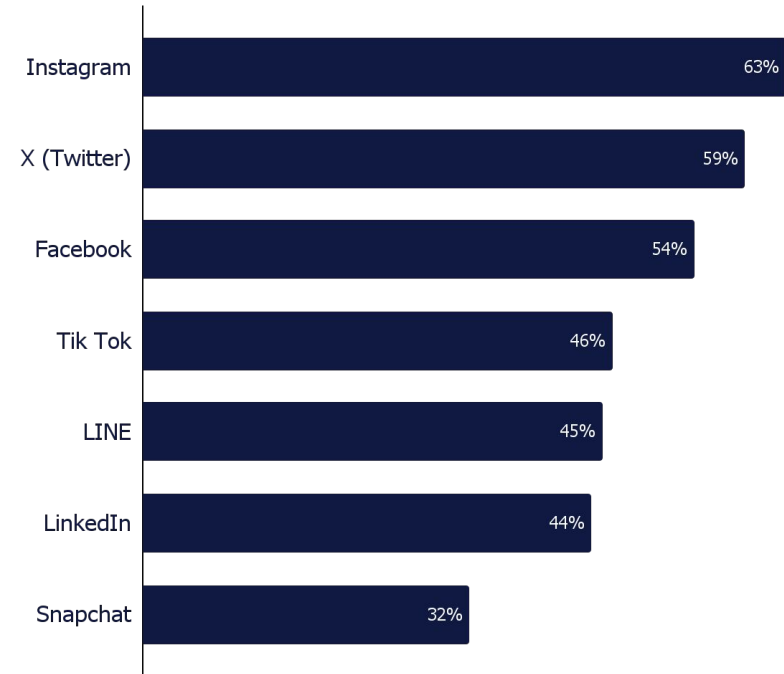
job portals and social media channels

Indeed remains the strongest brand among users of job portals, though its usage appears to be declining year on year. DODA, new to this years research, seem to perform relatively well compared to the other portals. Instagram has recovered from the dip it took last year to become the most utilized social media platform, with LINE having dropped considerably, although this conclusion is drawn from a limited sample.

job portals*

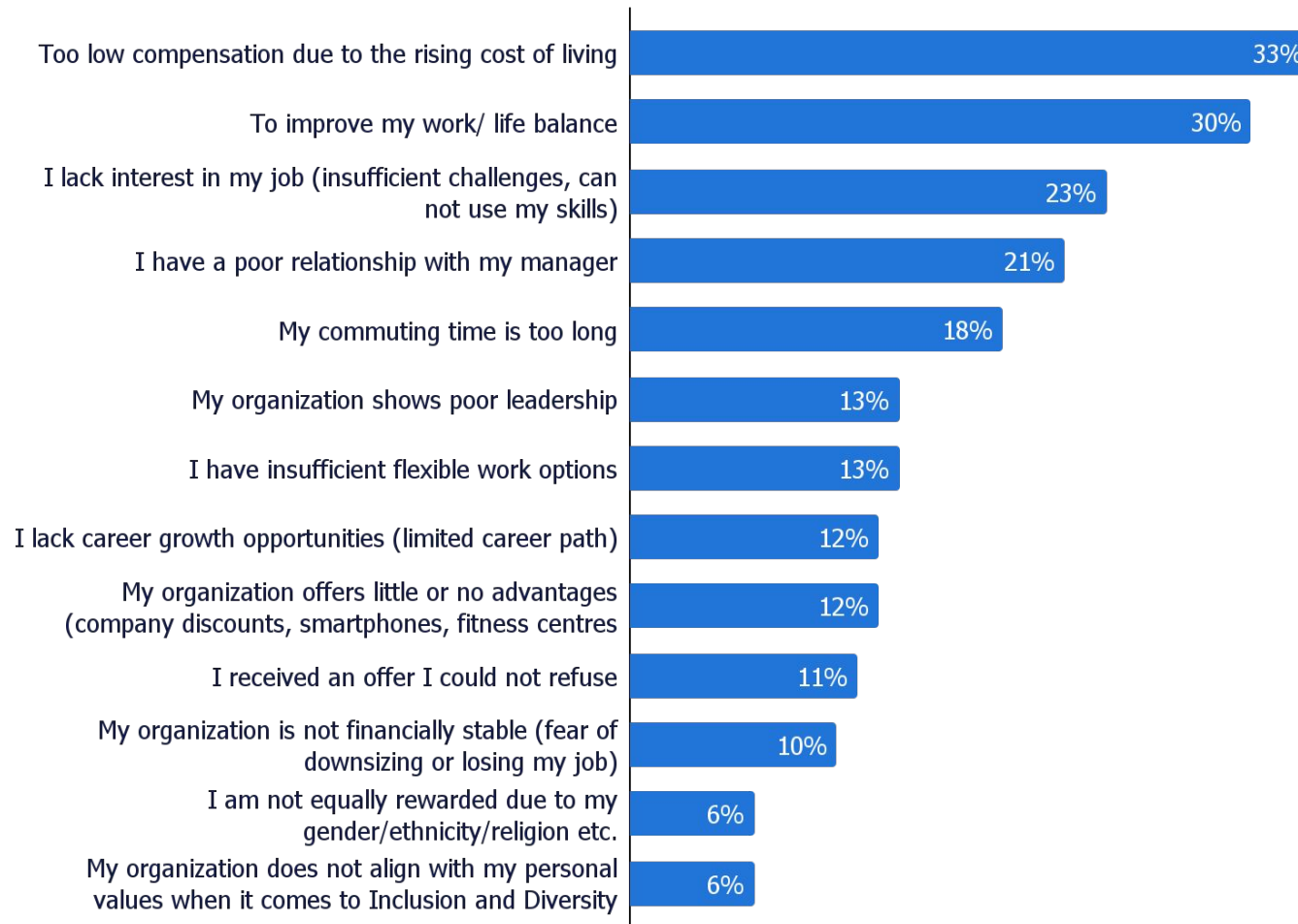


social media channels*



*note: job portals & social media are follow up questions from channels used to find new jobs.

reasons to leave an employer



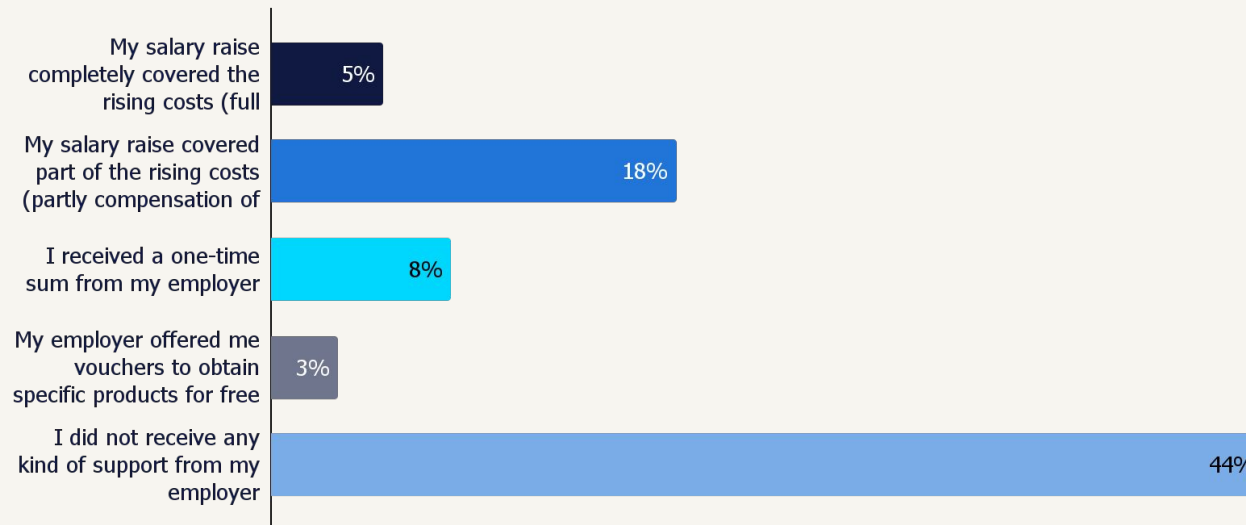
Too low compensation remains the primary motivator for leaving, with work-life balance coming a close second.

In fact, the potential reasons for leaving their employer have remained unchanged over the past year.

Gen Z (29%) are less likely to cite compensation as a motivator for leaving when compared to any other generation (avr. 34%). Whereas conversely, millennials (33%) show a greater inclination than other generations (avr. 26%) to switch employers in pursuit of a better work-life balance.

inflation compensation.

in what way has your employer financially supported you to help cope with the rising cost-of-living?



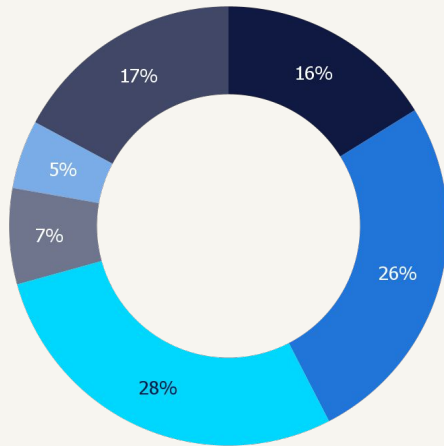
Two in five did not receive any kind of inflation compensation.

Older generations, particularly Baby Boomers, were more likely to receive no compensation compared to others. The same was true for the low to middle education levels.

Interestingly, even though too low compensation is the primary motivation for leaving, those who did not receive compensation were not necessarily more inclined to leave their employer compared to those who did receive some form of compensation.

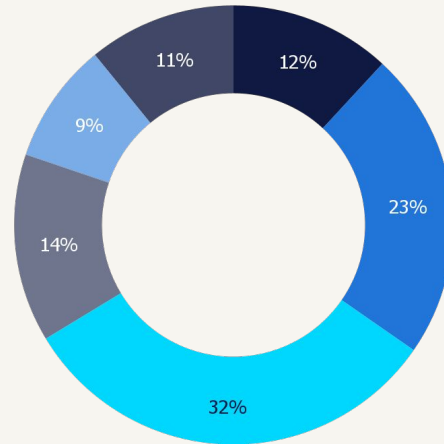
career progression.

importance of reskill



- 5 – very important to me
- 4
- 3
- 2
- 1 – not important at all
- don't know

enough opportunity to develop in your role



- 5 – completely true
- 4
- 3
- 2
- 1 – not at all true
- don't know

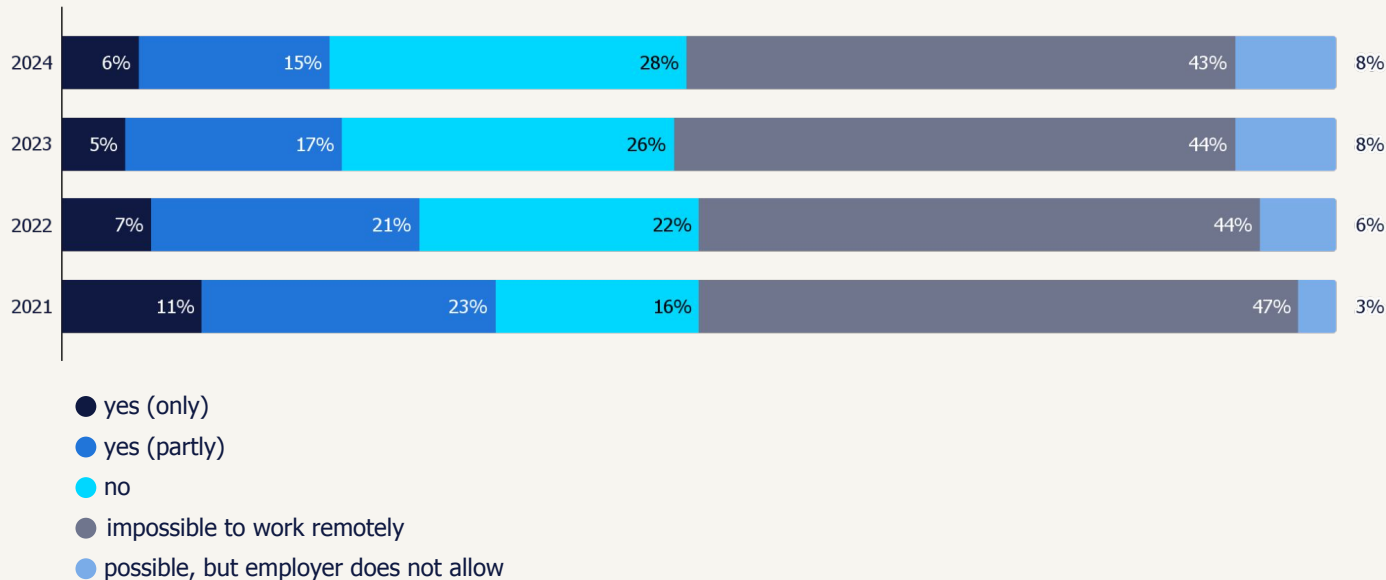
One in four workers are not given enough opportunities to develop in their role.

Even in a strained labour market, these employees are not more inclined to leave the company, compared to those who receive such opportunities.

Two out of five workers acknowledge the importance of reskilling, with Gen Z (49%) placing particular emphasis on this compared to other generations (avr. 37%), highlighting the necessity for offering reskilling opportunities whenever and wherever feasible.

trend in remote working.

do you currently work remotely/from home?



Remote working is now stabilizing in Japan.

Similar to last year, one in five individuals work (partly) remotely, though the higher educated are more inclined to do so (29%).

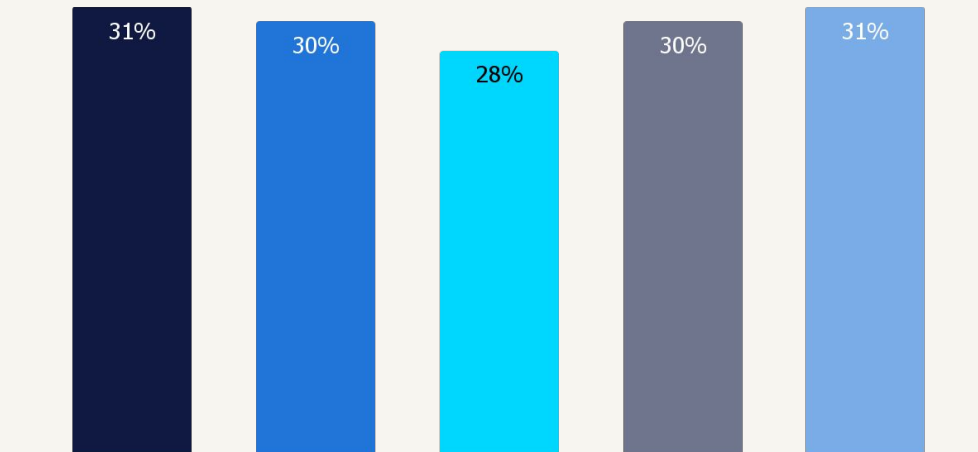
There is a possible trend indicating a reluctance among employers to embrace remote work, as evidenced by the consistently high proportion of individuals where remote work is impossible and despite the possibility is increasing for some, employers are hesitant to allow remote work arrangements.

annual topics: equity and AI.



equity.

Which of the following statements do you consider to be true for your current employer?



- my unique attributes, characteristics, skills, experience and background are valued in my organisation
- senior managers are fair when it comes to hiring or career advancements of those that report into them
- at my organisation, the best opportunities go to the most deserving employees
- my organisation provides equal pay for equal work
- senior managers are fair when it comes to reskilling and upskilling opportunities of those that report into them

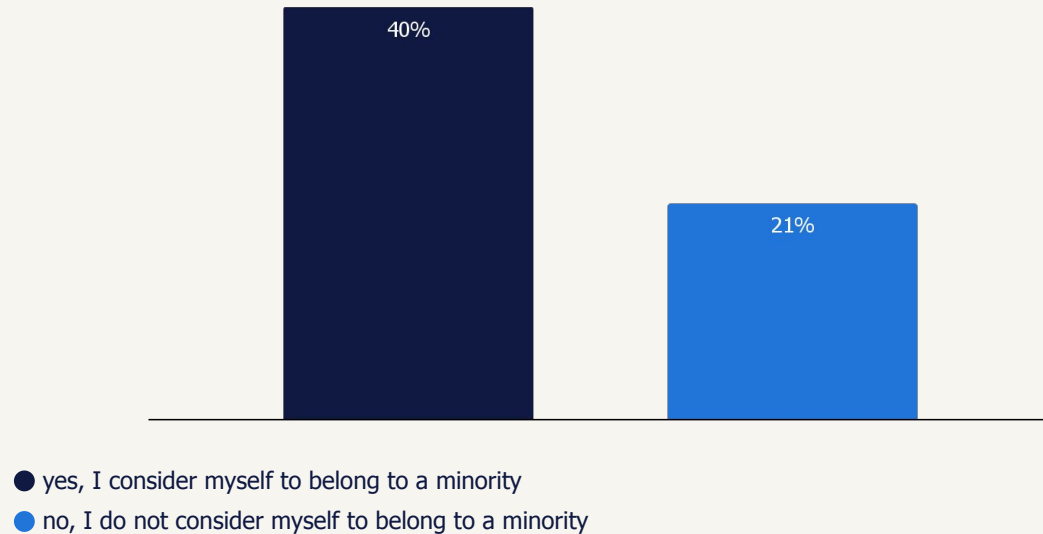
Employers in Japan are underperforming on equity

Barely one in three Japanese workers feel their employer meets their expectations across all equity variables.

GenZ tend to be more positive to employers in terms of equity, compared to other generations. Whereas Gen X are particularly critical in terms of opportunities going to most deserving employees.

equity.

I have faced obstacles in my career progression in this organisation which I believe are due to who I am



Twice as many workers who consider themselves a minority have faced obstacles in their career due to their identity.

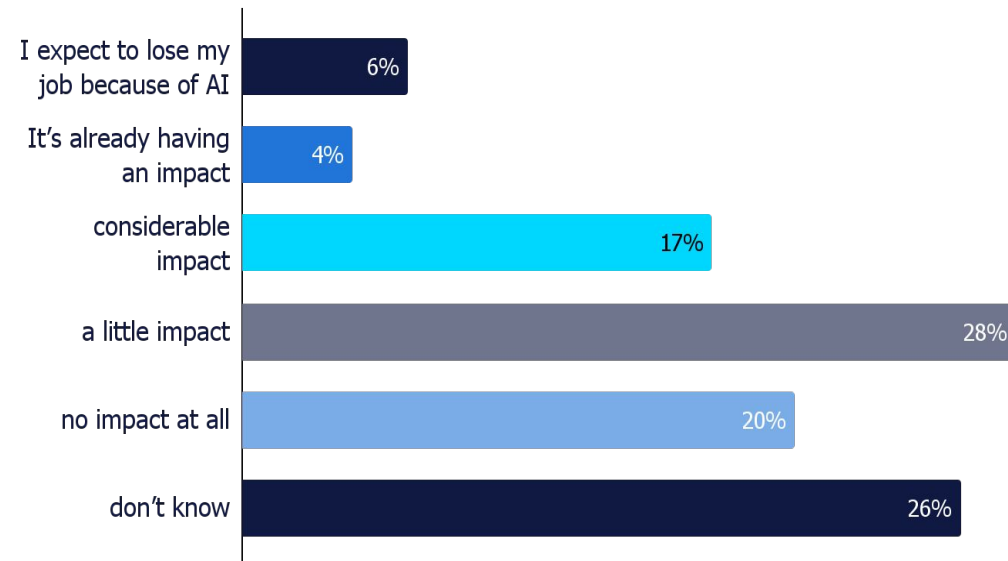
Given that one in five Japanese workers identify as a minority due to factors such as gender identity, religion, disability, or ethnicity, it is imperative for employers to take proactive steps to address this issue.

Gen Z workers more frequently report facing obstacles, partly due to their higher likelihood of identifying as a minority.

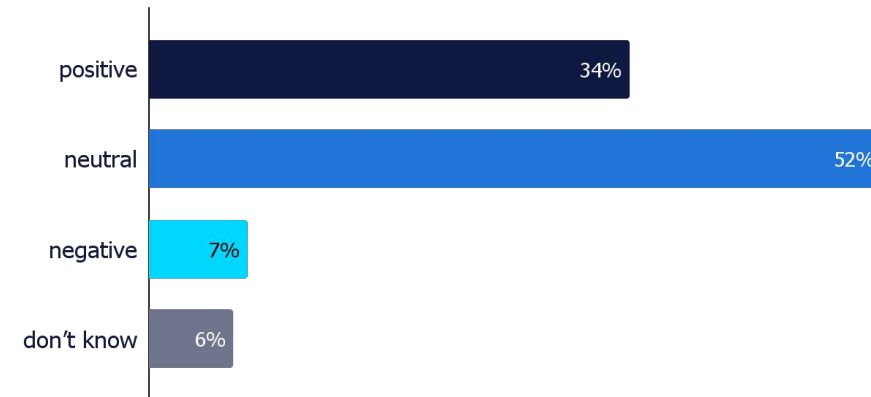
impact of artificial intelligence on jobs.

Approximately 1 in 10 employees regularly use AI, rising to 1 in 6 among the higher educated. Around half of Japanese workers anticipate AI impacting their job, with higher expectations among current AI users. The influence of AI on job satisfaction is generally positive, with 34% holding a favorable view and only 7% expressing negativity. Notably, Gen Z tends to be more positive about its potential impact.

expected impact of AI on your job



impact of AI on job satisfaction*



* only asked to those who see AI having a little to a considerable impact on their job.

An abstract graphic on the left side of the slide. It features a horizontal white line. Above the line, there are five vertical bars of varying heights and colors: dark blue, cyan, light blue, white, and light blue. Below the line, there are three vertical bars: cyan, light blue, and white. Each bar has a small circle at its base, with colors matching the bars. The first dark blue bar has a black circle above it.

your thoughts.

let's start a conversation

our research has many insightful, but complex insights so we'd love the opportunity to walk you through this document, share our thoughts and answer any questions you might have.

randstad japan

thank you.



partner for talent.