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2023 LGBT+ Inclusion @ Work Survey

Country profile: Japan

Key global findings:

Organizations have considerable scope to do more to demonstrate their commitment to LGBT+ inclusion. Many LGBT+ employees feel uncomfortable being out in the workplace and face non-inclusive behaviors. And when LGBT+ employees feel that their employers aren't doing enough to support LGBT+ inclusion, many are prepared to look for a new employer.



One-third of respondents are looking to move to a more LGBT+ inclusive employer. This is even higher for ethnic minority respondents, with over half currently looking for a new role. When it comes to choosing their new employer, what matters most to respondents is seeing a diverse workforce.



Being out at work is important for many, yet less than half are out with all colleagues. Less than half of respondents feel comfortable being out with all of their colleagues, and another one-third of respondents say that they are only comfortable being out at work with select colleagues.



Concerns about being treated differently keep many from being out at work. Other factors, including concerns about personal safety, facing discrimination or harassment, and a preference not to discuss their private life at work, play a role with reasons varying by sexual orientation and gender identity.




Comfort being out decreases when it comes to being out with direct managers. Just under 60% of those who are out about their sexual orientation, and 54% of those who are out about their gender identity are comfortable being out with their closest colleagues, while only 37% are comfortable being out with their direct managers.



Allyship and role models increase comfort in being out. Allyship plays a part when it comes to comfort in being out at work, with many who are out at work to at least some colleagues saying that allyship helps them to be out. Comfort being out about also increases with the presence of LGBT+ role models.



Non-inclusive behaviors are being experienced at work. Four in 10 respondents (42%) have experienced non-inclusive behaviors at work and many say they are certain it is a result of their sexual orientation or gender identity.



Methodology

The Deloitte Global LGBT+ Inclusion @ Work study is a global survey of 5,474 (non-Deloitte) LGBT+ employees that took place between January and February 2023 via online quantitative interviews and one-to-one in-depth qualitative discussions.

Countries surveyed: Australia, Brazil, Canada, China, France, India, Japan, Mexico, the Netherlands, Poland, South Africa, the UK, the US.

The following deck examines how **Japan's LGBT+ employees** stand out from their global counterparts on these key themes. Note that Japan base size numbers for certain survey questions do not allow for analysis of all the above points.

* LGBT+ was defined for survey respondents as the following: The LGBT+ acronym (which stands for Lesbian, Gay, Bisexual, Transgender and more) is used throughout this survey for consistency and includes anyone who does not identify as heterosexual and cisgender. Deloitte professionals were not polled as part of this survey. * We recognize that coming out is often an ongoing process rather than a single moment. For the purposes of the report, the phrase 'out at work' is intended to mean that people would be comfortable disclosing their gender identity or sexual orientation to colleagues should the opportunity present itself. *Gen Z is defined as born between 1995 – 2005, millennials as born between 1983 – 1994, and Gen X as born between 1967 – 1982

Country profile: Japan

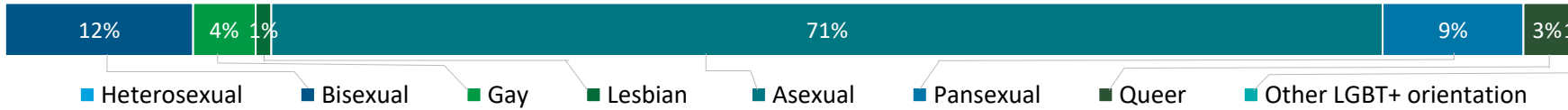
- 425 total respondents in Japan, 36% gen Z or millennials, 64% aged 40+. More than eight in 10 are full-time workers.
- 2% identify as non-binary/gender queer. Seven in 10 are asexual, 12% are bisexual and 9% pansexual. 1% identify as lesbian, and 5% as gay.



Gender



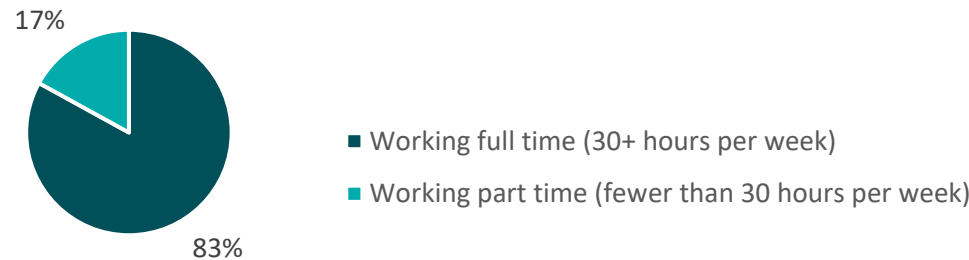
Sexual orientation



Age



Employment status



* Charts exclude don't know/prefer not to answer/unsure responses
** Due to rounding, percentages may not always add up to 100%

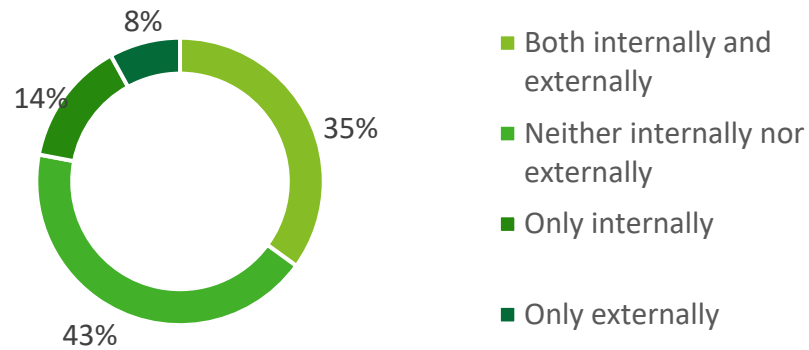
Examining employers' commitment to LGBT+ inclusion

- Nine in 10 Japanese respondents say their employers don't demonstrate commitment to LGBT+ inclusion either internally or externally.
- This contrasts with the global scores, where just less than half of employers (43%) do not demonstrate commitment either internally or externally to the organization.

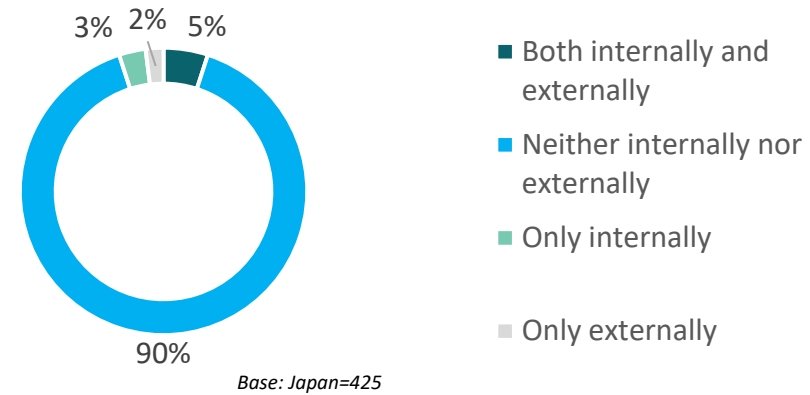


Percentage who say their employer demonstrates commitment to LGBT+ inclusion...

Global score



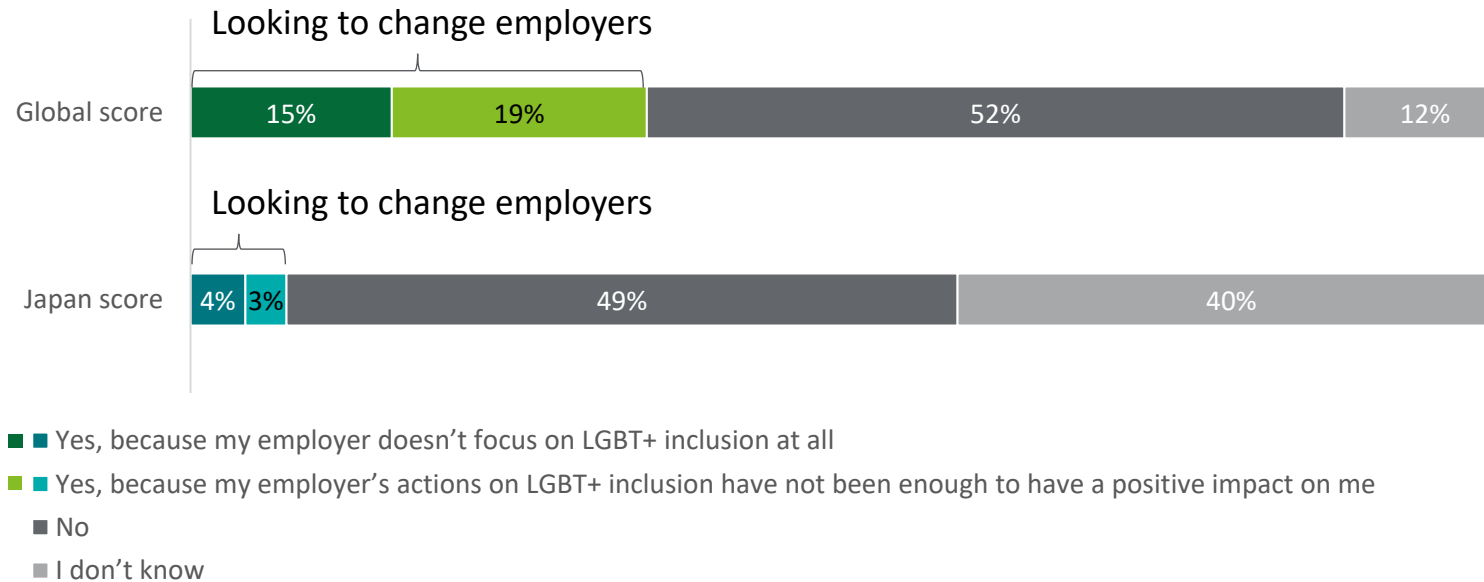
Japan score



- Only 7% of Japanese respondents say they are seeking out a more inclusive organization, compared to around one-third of global respondents. However, four in 10 in Japan don't give any firm response to this question.



Percentage who are actively looking to change employers to find an organization which is more inclusive of LGBT+ employees



Base: Global= 5474, Japan=425

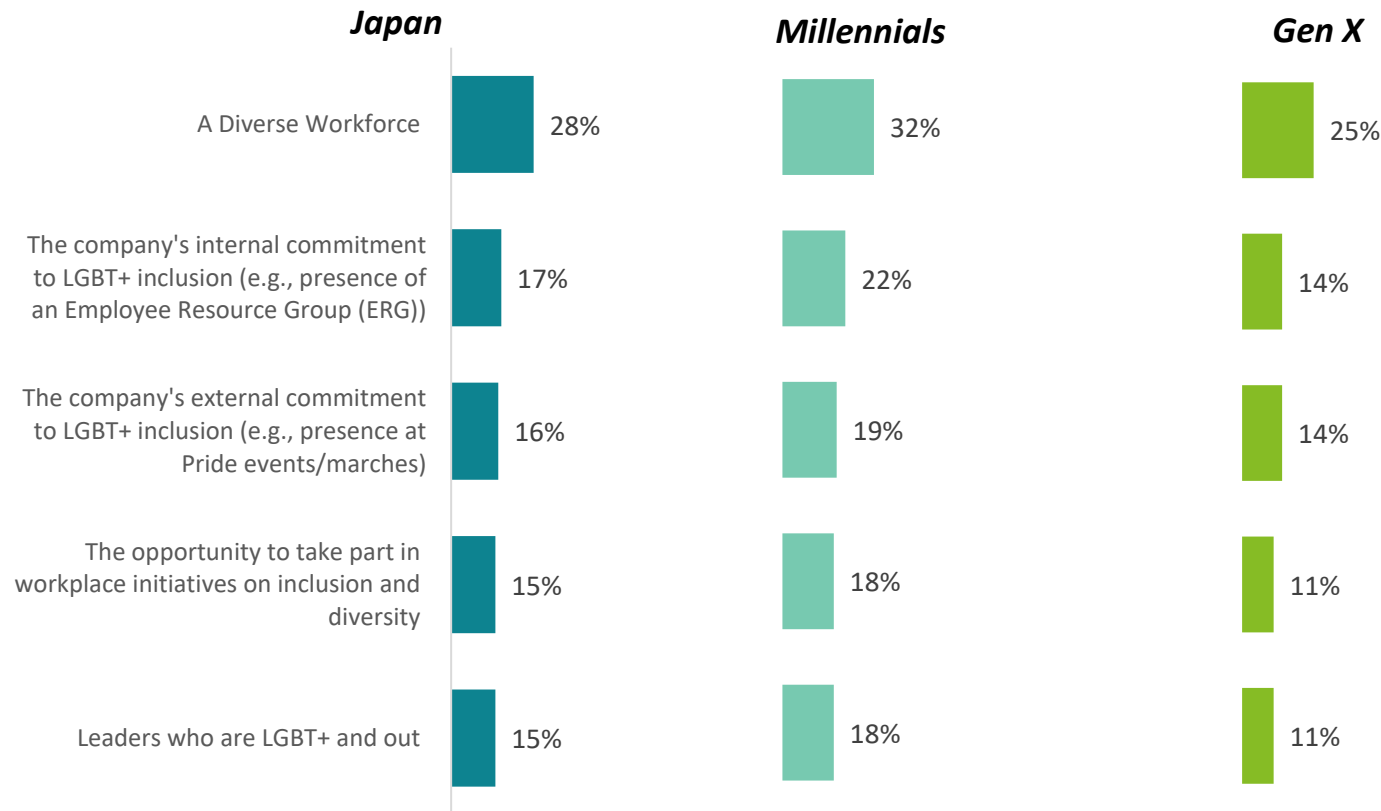


Top factors for LGBT+ respondents when considering a potential employer, and the generational divide

- A diverse workforce is the most important factor when applying for a new role in Japan, cited by just over a quarter of respondents. A company’s internal and external commitment to LGBT+ inclusion are the next most important considerations.
- Millennials are more likely than Gen X to attach greater importance to all factors when applying for a job.



Top factors when applying for a new role:



Base: Japan = 425, Gen Zs = 25*, Millennials = 129, Gen X= 271
 *Analysis not included due to low base size

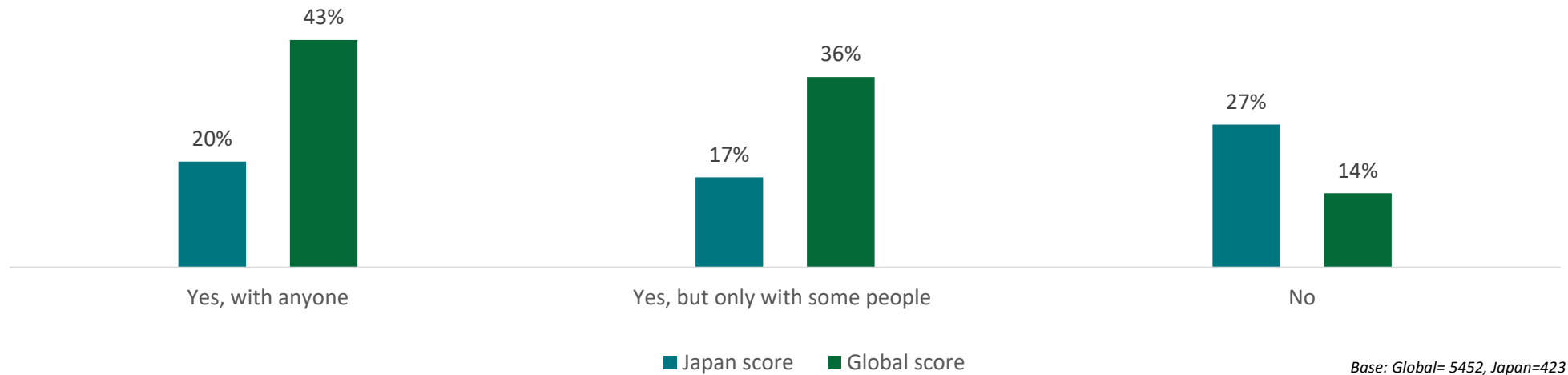


Level of comfort being out at work

- One in five Japanese respondents say they are comfortable being out about their sexual orientation with anyone at work, compared to 43% globally.
- Almost three in 10 say they aren't comfortable being out at work at all, roughly double the global average.



Level of comfort being out at work about my sexual orientation

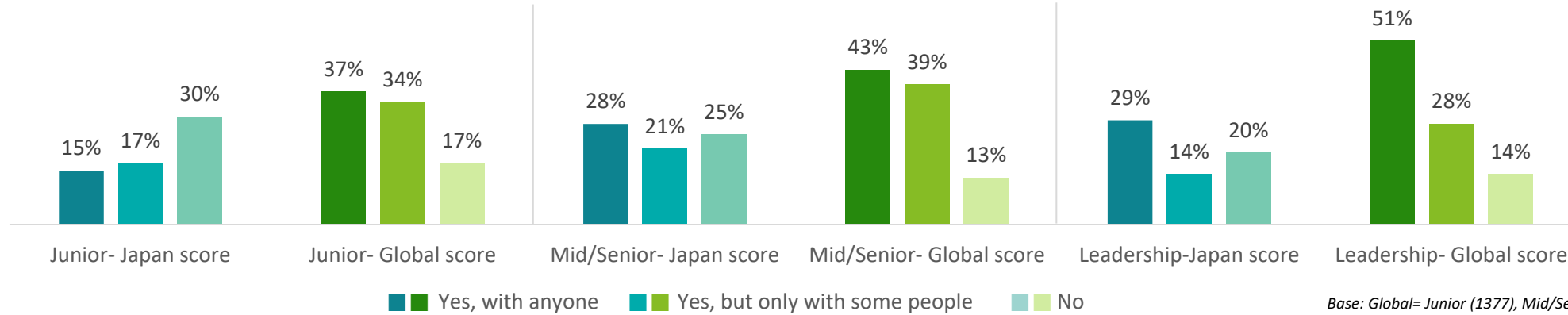


How seniority and allyship impact comfort in being out at work

- More senior LGBT+ employees are likely to be out about their sexual orientation at work in Japan, as in the rest of the world. However, even at the more senior levels, Japanese respondents are much less likely to be out vs the global average.
- Respondents in Japan are less likely than the global average to say that allyship helps with being out about their sexual orientation at work.



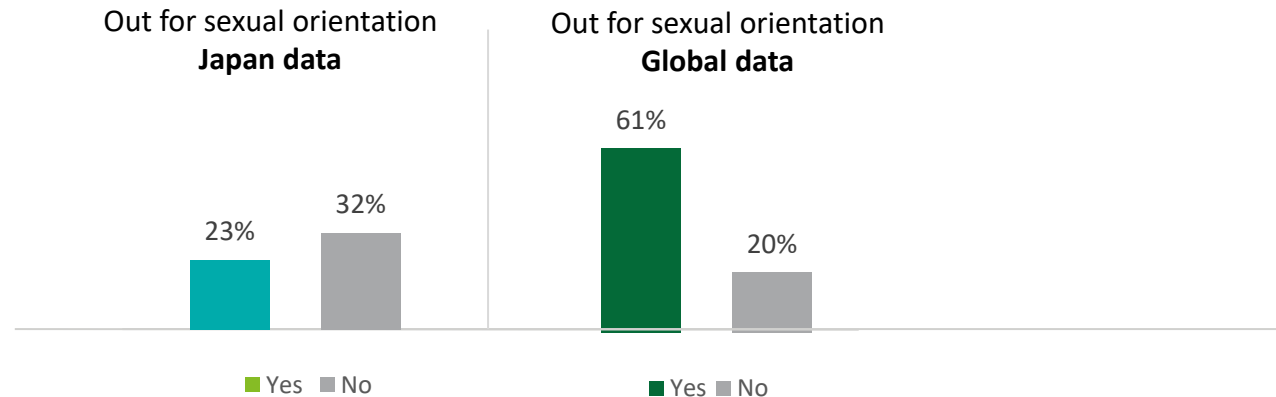
Level of comfort being out at work about my sexual orientation by seniority



Base: Global= Junior (1377), Mid/Senior (3195), Leadership (880)
 Japan = Junior (271), Mid/Senior(78), Leadership(74)



Does allyship help with being out?



Base: Japan = Out for sexual orientation (154), Out for gender identity (5) – base size too low for analysis

Base: Global = Out for sexual orientation (4300), Out for gender identity (439)

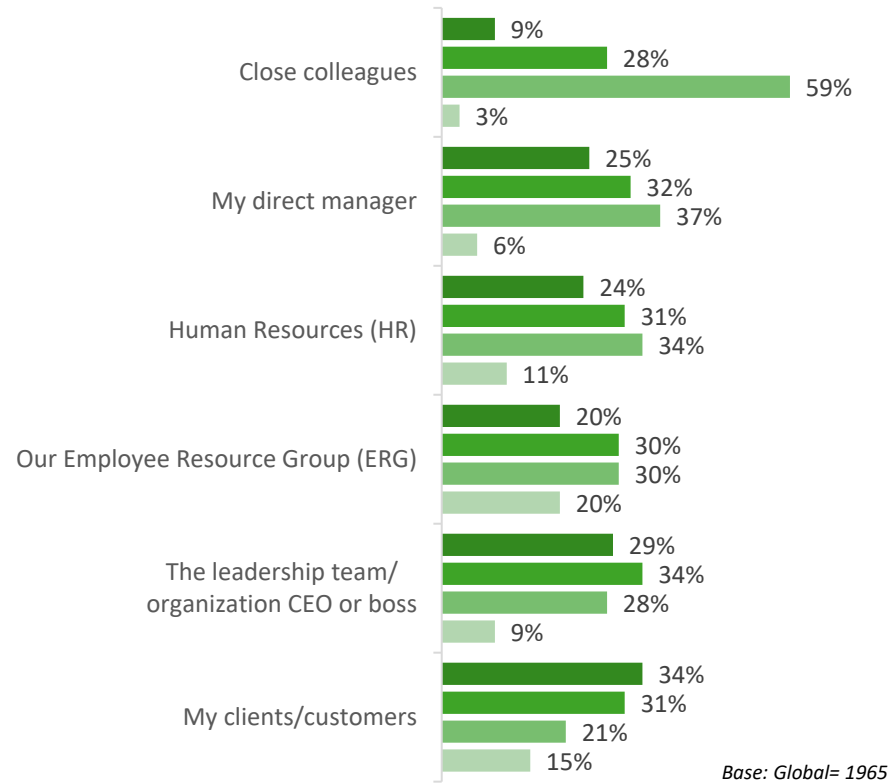


Exploring which groups respondents are most comfortable being out with regarding their sexual orientation

- Japanese respondents follow the worldwide trend in feeling most comfortable being out with their colleagues and direct managers vs other groups at work. Nevertheless, Japanese respondents are still twice as likely as the global average to say they avoid being out with close colleagues.
- Respondents are most uncomfortable being out with clients/customers in Japan and globally.



Level of comfort being out at work about my sexual orientation with different groups - **Global score**



■ I am uncomfortable and avoid it
 ■ I am uncomfortable but trying to be more open
 ■ I am comfortable and open
 ■ Doesn't apply



Level of comfort being out at work about my sexual orientation with different groups - **Japan score**



■ I am uncomfortable and avoid it
 ■ I am uncomfortable but trying to be more open
 ■ I am comfortable and open
 ■ Doesn't apply



What is preventing respondents from feeling comfortable being out?

- Just over one-third of Japanese respondents who aren't out about their sexual orientation at work cite preferring not to wanting to talk about their private lives as the main barrier.
- Compared to the global average, Japanese respondents are less worried about an adverse impact on their career opportunities (only 12% compared to over one-quarter globally) or being treated differently from anyone else (only 14% compared to almost four in 10 globally).



Barriers to being out about sexual orientation at work

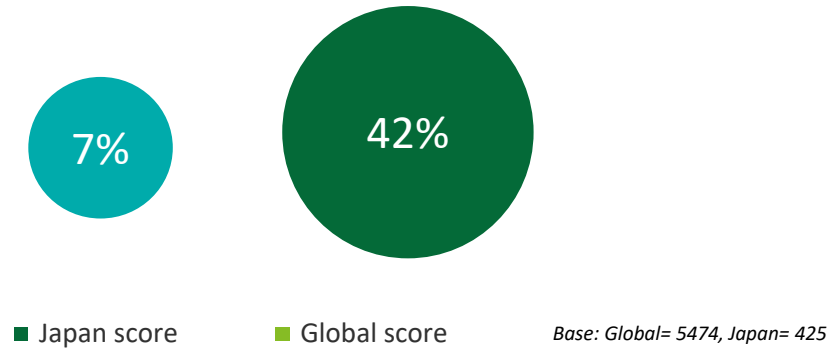


Experience of non-inclusive behaviors

- Only 7% of respondents in Japan report having experienced non-inclusive behaviors, compared to the 42% global average.
- Due to the small number of people involved, we are not able to provide further analysis at the Japan country level.



Those who have experienced non-inclusive behaviors





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