

Effects of the Promotion of “Women’s Empowerment”

**—Suggestions based on a three-country survey in Japan,
the U.S. and China (Volume 1)—**

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In the U.S. where the share of female executives is far greater than that in Japan, invisible gender gaps still persist and many women face the challenges of balancing career and family, exposing a situation that is surprisingly similar to that in Japan. Even so, the rise of “Indie Women (unmarried, financially stable working women)” has been gathering attention as one of the new, rapidly growing consumer segments.

In China, a state policy of promoting gender equality in the labor market has led to the rise of strong and forward-thinking women. However, in recent years, the wages of babysitters who are rural migrant workers and who have supported two-income families in urban areas have been soaring. Because the high childcare expense makes working less justifiable, the proportion of stay-at-home mothers has been increasing. In the future, there will be many more work options offering greater flexibility as exemplified by an increasing number of women who are starting online businesses.

In Japan, gender bias in the division of labor has become less conspicuous and the number of couples where both husband and wife work has been increasing. Nevertheless, in most cases, wives work merely as secondary wage earners. The underlying factors behind women remaining secondary earners include Japan’s working environment that makes it difficult for both men and women to achieve a healthy work-life balance, in addition to the shortage of childcare support services.

Survey results suggest that enabling both husband and wife to achieve and maintain a good work-life balance will lead to an increase in the levels of life satisfaction and happiness and will eventually boost the country’s vitality. In addition to stimulating women’s spending, the promotion of women’s empowerment will bring about an increase in the number of households where both husband and wife work full time and show a higher propensity to consume, with an associated expansion of consumption driven by leisure activities. An increase in the number of young families will also have the effect of expanded spending.

I Forms of the Family in Japan, the U.S. and China, Respectively, and Related Challenges Facing Each Country

When conducting consumer market research in the Japanese market, the question often comes to mind as to whether the discovered trends and signs are unique to Japan or are commonly seen throughout the world. Since 1997, Nomura Research Institute (NRI) has been conducting the “Questionnaire Survey of 10,000 Consumers” every three years throughout Japan. The survey aims to recognize any change in value orientations, lifestyles, consumer mindset and behavior among Japanese consumers. Thus far, the survey revealed a wide variety of trends and signs. Given the increasing globalization of consumer markets, it is very important to clearly define the characteristics of the Japanese market when these trends and signs are viewed from an international perspective. Furthermore, having a proper understanding of the sense of values and culture models that give rise to the characteristics of the Japanese consumer market in comparison with those in other countries would serve as a “foundation” in any attempt to consider the future of the Japanese market.

Based on this perspective, NRI conducted online surveys ^{note} in the top three countries in terms of gross domestic product (GDP), namely, the U.S., China and Japan. These surveys were designed to compare consumers’ value orientations, lifestyles and consumption trends among the three countries. Two NRI Papers (Nos. 208 and 209) report the results of these surveys with a focus on two different themes.

This paper considers “women’s empowerment,” which has been drawing attention as the key strategy of the Abenomics growth program. Please note that in consideration of the objective of the survey being the measurement of the degree of influence on the consumer market, data on China were based on a questionnaire survey aimed at Internet users living in urban areas in Tier-0 cities (Beijing, Shanghai and Guangzhou), Tier-1 cities (Dalian and Nanjing) and Tier-2 cities (Harbin, Xian and Chengdu), who are considered as those classified as advanced segments.

As a backdrop behind women’s empowerment activities, this paper begins by briefly explaining the family-related situations in each of the three countries as well as the challenges facing each country.

1 Current status of the trend toward an aging society with fewer children

(1) Japan is a current leader in the world in terms of the trend toward fewer children and an aging population

Japan currently faces the serious demographic problem of a rapidly aging population and a declining birthrate.

In this regard, Japan is a worldwide leader. According to the National Institute of Population and Social Security Research, if these trends continue, Japan’s total population is projected to shrink to about two-thirds of its current size, or 86.74 million, by 2060, and its elderly population aged 65 or older will make up 39.9 percent (nearly 40 percent) of the nation’s population.

The consequences that directly stem from these trends include a decrease in working-age population and a shrinking economy. Because a declining working-age population must support a growing number of elderly people, the nation must deal with an extremely heavier social security burden. With an excessive concentration of population and industry in Tokyo still remaining unabated, population decline may cause some communities to fade away, in particular, in rural areas. Eventually, the challenges of an aging population and fewer children may undermine Japan’s national strength and may cause Japan’s global presence to decline.

(2) China faces the issue of elderly care as represented by the 4-2-1 family structure

China’s demographic distortions that are attributable to its one-child policy appear to be getting worse, rapidly raising concerns over care for the elderly. Currently, what is known as the “4-2-1 family structure” has become a social problem in China. This phenomenon is the result of China’s one-child policy and accelerating population aging in which one working person is responsible for caring for both parents and four grandparents. In addition, the issue of caring for “empty-nest elderly” (elderly couples living alone or elderly with no children) and “loss-of-single-child elderly” (elderly parents who have lost their only child; they are generally aged 50 or older and cannot bear another child) also poses serious problems. Over the last ten years, the number of empty-nest seniors increased by more than 10 percent. The proportion of these empty nesters among the elderly aged 60 or over was 49 percent in 2010, and is projected to increase to 60 percent by 2020. According to the estimate made by China’s demographic expert Yi Fuxian, the number of loss-of-single-child elderly households is expected to exceed 10 million by 2050, or 10.06 million.

China introduced the one-child policy in 1979, which basically prohibited most couples from having more than one child with exemptions in some cases. However, as the nation increasingly faces demographic distortions in the forms of the “4-2-1 family structure,” “empty-nest elderly” and “loss-of-single-child elderly,” the central government has now been easing this policy to correct such distorted phenomena.

(3) The U.S. keeps a greater proportion of younger people in its population pyramid by virtue of immigrants and “new families”

In contrast to Japan and China, the U.S. keeps a greater proportion of younger people in its population pyramid

by virtue of immigrants and “new families.” The comparison of population pyramids of the three countries indicates that unlike barrel-shaped pyramids for Japan and China, the U.S. still retains a broad-based pyramid (Figure 1). Nevertheless, there are signs of ongoing population aging even in the U.S. These signs include that the 18 – 44 age group is getting smaller very quickly. As baby boomers approach the retirement age, there are increasing concerns that there are not enough young people to support them. According to a survey conducted by Pew Research Center, a majority (56 percent) of Americans agreed in 2005 that taking care of elderly parents in the future is an important responsibility.

Be that as it may, many researchers are optimistic about the demographic outlook for the U.S. The factors lying behind this rosy outlook include that the U.S. total fertility rate (TFR) has hovered around 2.00 children per woman, which is considered the minimum necessary to keep the population stable, even though the rate has been sliding since 2007. Moreover, no studies show that couples want to have fewer children or no children. Rather, American women ideally want to have more children than they actually have. Furthermore, the U.S. is an interesting case with regard to population aging because of its high rate of immigration and success-oriented baby boomers staying in the workforce longer. As long as these trends continue, it is predicted that the issue of an aging population in the U.S. would not become a major problem, while other countries may struggle with population aging more than the U.S.

Another factor contributing to slower population aging in the U.S. is the rise of “new families.” The family structure has been getting more and more diversified in the U.S. Traditional marriage, in general, has become less important and there are increasingly more single-parent households, cohabiting couples and same-sex marriages where the stereotypical gender roles no longer apply.

Single parenthood is becoming more accepted, and couples are intentionally having children without being married or even living together. In 2008, 41 percent of births were to unmarried women. Demographic Intelligence, which provides U.S. fertility forecasts, projects that the number of children born out of wedlock will rise to 50 percent by 2023.

Today, single mothers account for 25 percent of U.S. households, while single fathers make up another 6 percent. The rise of single-parent households, as well as the difficulty for single parents to take care of their children while earning enough to survive, has long been an issue in the U.S. Therefore, all sorts of nationwide and statewide programs, big and small in scale, are available to support them, whether it be in terms of housing or education.

The biggest factor driving change in the definition of an American family is same-sex marriage. Nearly 60 percent of Americans now support same-sex marriage. As of early June 2015, same-sex marriage was legal in 37 states and Washington, D.C. Currently, the United

States Supreme Court is examining whether state laws banning same-sex marriage are constitutional. If the Supreme Court rules in favor of same-sex marriage, it will be legalized in all U.S. states. A younger and more educated population favors legalization of same-sex marriage. Seventy-five percent of Americans think legal recognition of same-sex marriage is inevitable. The 2013 American Community Survey results marked the first time the U.S. Census integrated an estimated 180,000 same-sex married couples as families in national statistics. (On June 26, 2015, the United States Supreme Court ruled that state-level bans on same-sex marriage are unconstitutional. This ruling made marriages of same-sex couples legal nationwide.)

Even without legalization of their marriages, child adoption by same-sex couples has been growing. The number of same-sex couples adopting children has more than tripled in the past decade. When it comes to discrimination against gays and lesbians for child adoption and in work places, support to make it fair was stronger than that for legal marriage. As of 2009, there were over 32,000 adopted children living with same-sex couples.

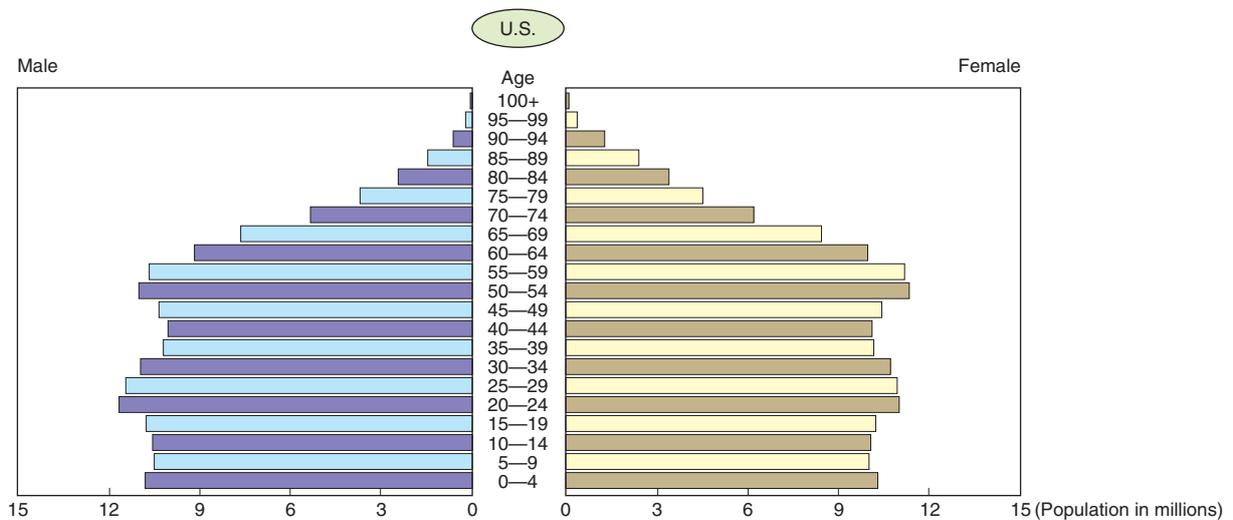
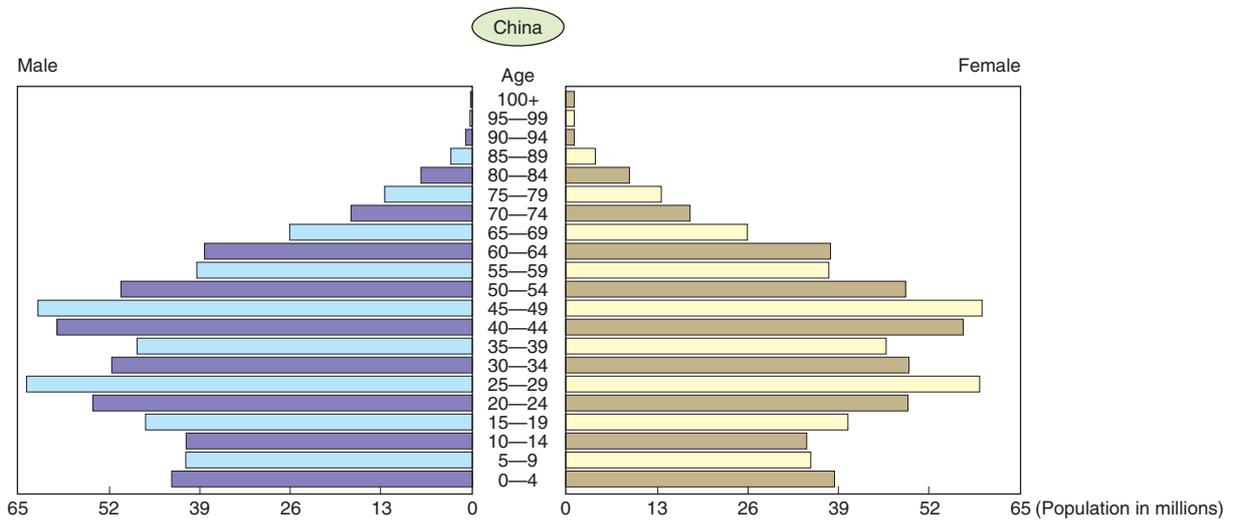
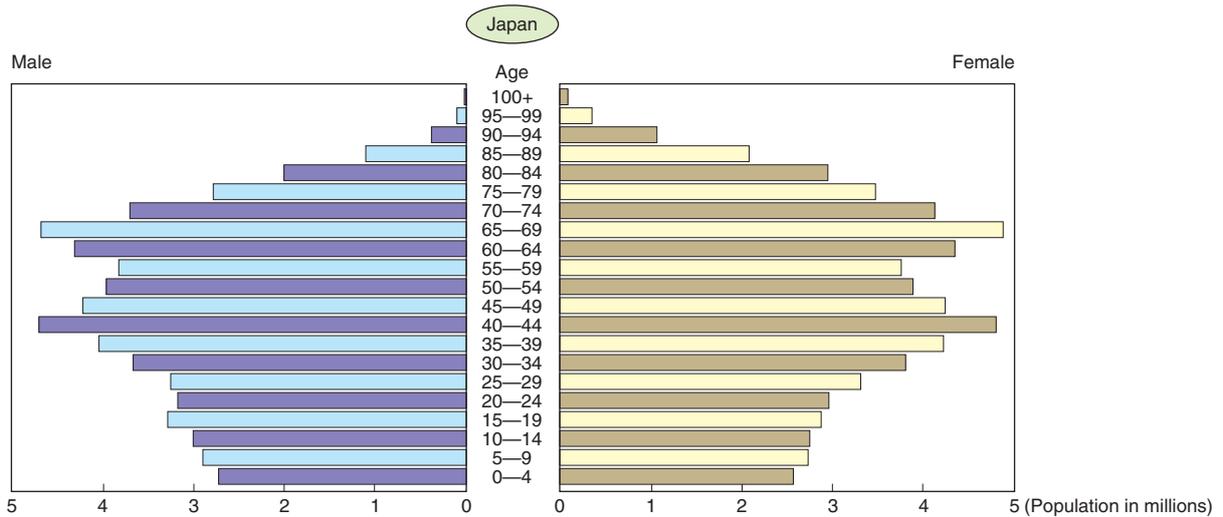
2 Change in the “size” of a family

(1) Smaller families are increasingly prevalent in Japan and China

In Japan, the number of smaller families is on the rise due to the increasing trends toward not marrying at all and marrying later as well as the increase in the number of elderly people living alone. By 2030, the proportion of single persons without a spouse is projected to reach about 50 percent of the nation’s population, with single-person households accounting for more than one-third of all households in Japan.

Similar to Japan, the trend toward smaller families is also accelerating in China. Currently, the number of Chinese households is 430 million (about one-fifth of the world’s families), of which the proportion of nuclear families is approximately 70 percent, or 300 million. The number of family members per household declined to 3.02 in 2012 from 5.3 before the 1950s. Over ten years, from 2000 to 2010, the number of single-person households doubled, with two-person households increasing by 60 percent. As of 2010, the proportion of single- and two-person households reached about 40 percent of all households in China, or more than 160 million. This proportion is expected to further increase. Background factors behind such an increase lie in a one-child policy, which caused the country’s fertility rates to stay low, increasing trends towards late marriage, a growing number of people who do not marry at all and rising divorce rates. In particular, the divorce rate in China has risen over the past ten years in a row. The rise in divorce rates is especially prominent among young couples. In addition, increasing average life expectancy is adding to the number of single elderly households, which is giving

Figure 1. Population pyramids in 2015



Source: United States Census Bureau (<http://www.census.gov/en.html>)

impetus to the trend toward smaller families. While there are still a relatively large number of families consisting of three generations living together in rural areas, many non-traditional forms of family are appearing, especially in urban areas. Particularly noticeable is the soaring number of elderly people living alone, single-parent families and working couples without children.

(2) The rise of multigenerational households in the U.S.

Speaking of the U.S., we generally consider that most young Americans usually leave their parents' home by a certain age to live independently. However, following the recession in 2008, the percentage of multigenerational households spiked, a trend that is likely to continue. The prevalence of multigenerational households is dependent on various factors. The rate of immigration (new immigrants live with their relatives), the rate of births to unmarried mothers (unmarried mothers live with their children in their parents' homes), the cost of housing (housing shortages or high costs), and the health outcomes for seniors are some factors that have contributed to the recent rise of multigenerational households. Since 2007, the number of multigenerational households has increased in 40 states. This trend is particularly noticeable in California, Arizona and New Mexico in the western states, in Texas and Florida in the southern states, and in the overall northeastern region.

Both youth and the elderly are returning to live with the 35 to 54-year-old group. This is sustainable thanks to the large group of baby boomers (born between 1946 and 1964). Both the younger and older segments of the population are experiencing major changes in their lifestyle from longer life expectancy (aging population), delayed marriage and "boomerang kids" (adult children who started to live independently after graduating from high school or university move back to live with their parents). For older adults, moving back in with their children is a result of "kin availability." On the other hand, their children also expect to take care of their parents in the future. That is, the rise of multigenerational households is the result of the interdependence of family members in the face of changes in social environments.

A study of "Families in Society," a journal published by the Alliance for Strong Families and Communities, found that Americans who live in multigenerational households are supportive of one another in terms of both time and financial resources. Rather than making a living individually, they live with combined incomes, creating stronger levels of connection as a whole. The Pew Research Center also found that of the "boomerangs," almost half paid rent and nearly 90 percent helped with household expenses.

(Sources for the above statements include the Pew Research Center, PulteGroup, Inc. and Families in Society.)

3 Current concerns of people in Japan, the U.S. and China

(1) Most Americans have high levels of life satisfaction despite a strong sense of unease over job security, job loss, deteriorating public order, etc.

According to the results of NRI's online three-country survey about worries and anxieties that respondents now have, as compared with the other two countries, particularly distinctive in the U.S. is a large proportion of U.S. respondents who are concerned about "job security, job loss," "stress, mental disorders" and "deteriorating public order, rising crime." In the face of the much debated issue of the U.S. healthcare system, the largest proportion of American respondents (38 percent) is concerned about "my health," with 27 percent (the fifth largest) worrying about "tax increases, increases in social security premiums." In addition, a relatively large proportion of respondents is concerned about matters such as "terrorist attacks, war," "invasion of privacy" and "relations among family members, relations with relatives." Overall, it is not reasonable to assume that Americans have few worries and anxieties. Furthermore, the proportion of American respondents who selected "low" in their self-assessments of their standard of living is the largest among the three countries, suggesting that many Americans are anxious about their economic situation (Table 1).

Nevertheless, among the three countries, American respondents have significantly high levels of life satisfaction and happiness. Because there is the lowest correlation between self-assessed living standards and levels of happiness among the three countries, this finding suggests that Americans feel satisfied and happy with something other than that associated with their economic situation. This something appears to come from social environments in which it is relatively easy for people to live their lives in their own desired way. Examples include social acceptance of "new families," which was described in Item (3), Section 1, mutual support among family members in multigenerational households and spacious living environments enabling multigenerational family members to live together.

(2) Many Chinese respondents are concerned about "food security," "parents' health," "children's education, going on to higher education, employment" and/or public order in rural areas

In this three-country survey, survey subjects in China were limited to those living in Tier-0, Tier-1 and Tier-2 cities where domestic economic conditions are relatively good. Therefore, the levels of life satisfaction and happiness were the second highest, next to the U.S. However, the concerns that many more Chinese people have than those in the other two countries are about "food security," which is frequently reported by news media, "parents' health," which is associated with the

Table 1. “Do you currently have worries and anxieties? If so, what do you worry about?” (Multiple choice)

	Japan	U.S.	China
1st	My health: 35%	My health: 38%	<u>Food security: 52%</u>
2nd	<u>Tax increases, increases in social security premiums: 31%</u>	<u>Job security, job loss: 33%</u>	<u>Parents' health: 43%</u>
3rd	Decreased income, decline in asset value: 30%	<u>Stress, mental disorders: 29%</u>	My health: 42%
4th	<u>Collapse of social security system such as public pension scheme: 27%</u>	<u>Deteriorating public order, rising crime: 28%</u>	Decreased income, decline in asset value: 30%
5th	Parents' health: 26%	Tax increases, increases in social security premiums: 27%	<u>Children's education, going on to higher education, employment: 28%</u>

Note: An item underscored with a wavy line is the one selected by a significantly larger proportion of respondents as compared to the other two countries.
Source: “Online Consumer Survey in Japan, the U.S. and China” conducted by Nomura Research Institute in August 2014

4-2-1 family structure requiring elderly care and “children’s education, going on to higher education and employment.”

Even though rural areas were not covered by the 2014 survey, in rural China, the “386199” phenomenon has become a serious issue (“386199” alludes to women, children and elderly people, which comes from the fact that March 8 is Women’s Day, June 1 is Children’s Day and September 9 is the day of the elderly). Attracted by greater job opportunities in urban areas, the number of migrant workers from rural to urban areas has been increasing, leading to an increase in the number of left-behind families (seniors, children and women) in the countryside. As a result, crimes against these vulnerable people have frequently occurred, causing a social problem. Particularly serious are crimes against left-behind children. Recent news stories reported that as many as 94 percent of cases that occurred in Huazhou, Guangdong, involved left-behind children. In addition, the number of cases is on the rise in which by living apart from their parents for a long time, left-behind children suffer emotional trauma and develop psychological problems. According to the statistical agency of Henan Province, the registered agricultural population in Henan was 67 million, the number of migrant workers was 15 million and nearly half of the agricultural population belong to the 386199 group. If this figure is used to extrapolate a nationwide figure, the size of the nationwide 386199 group is several hundred million people.

(3) Japanese respondents are most concerned about the future and have the strongest locked-up feeling among the three countries

In Japan, where the trend toward an aging population and declining birth rates is most noticeable of all countries in the world, the largest proportion (35 percent) of Japanese respondents is concerned about “my health.” As compared to the other two countries, the distinctive feature is that a large proportion of respondents selected “tax increases, increases in social security premiums”

(31 percent) and “collapse of social security system such as public pension scheme” (27 percent). In addition, Japanese respondents showed a significantly lower level of optimism for the future, which was revealed by their responses to the choice of “I think my future will be happy.” This choice is designed to discern the levels of life satisfaction and happiness. As such, the survey revealed that Japanese had the lowest disposition among the three countries.

To get over the locked-up feeling, increased attention is being paid to “women’s empowerment,” which is a key strategy in the Abenomics growth program. Given ongoing shortages in the labor force, women’s participation is essential. At the same time, to prevent the trend toward fewer children from being accelerated, we cannot downplay women’s roles of giving birth to and raising children. This exactly represents the situation where society as a whole must support women to enable them to strike a balance between work and family life.

II American Women and Chinese Women

Given the situation surrounding each country as discussed in Chapter I, this chapter focuses on the status of women, i.e., current circumstances surrounding women and future predictions, and introduces reports from the U.S. and China on this issue.

1 American women: Superwomen are suffering from “invisible” gaps

(1) While the number of American women in leadership positions is increasing, American women are still having a hard time balancing career and family

In the U.S. today, two out of three married mothers with children are employed, and they have increasingly been earning more money. In 2012, 38.1 percent earned more

than their husbands. This proportion is expected to increase and exceed 50 percent by 2030. In addition, the proportion of households with children under 18 in which a woman is the breadwinner reached 40 percent, four times that of 1960. The number of households in which women play an important role in earning a large part of family income is increasing sharply. Even in the U.S. where the share of female executives is far greater than that in Japan, male dominance in the workforce still remains strong and many women face deep challenges of balancing work and family in the same way as Japanese women do.

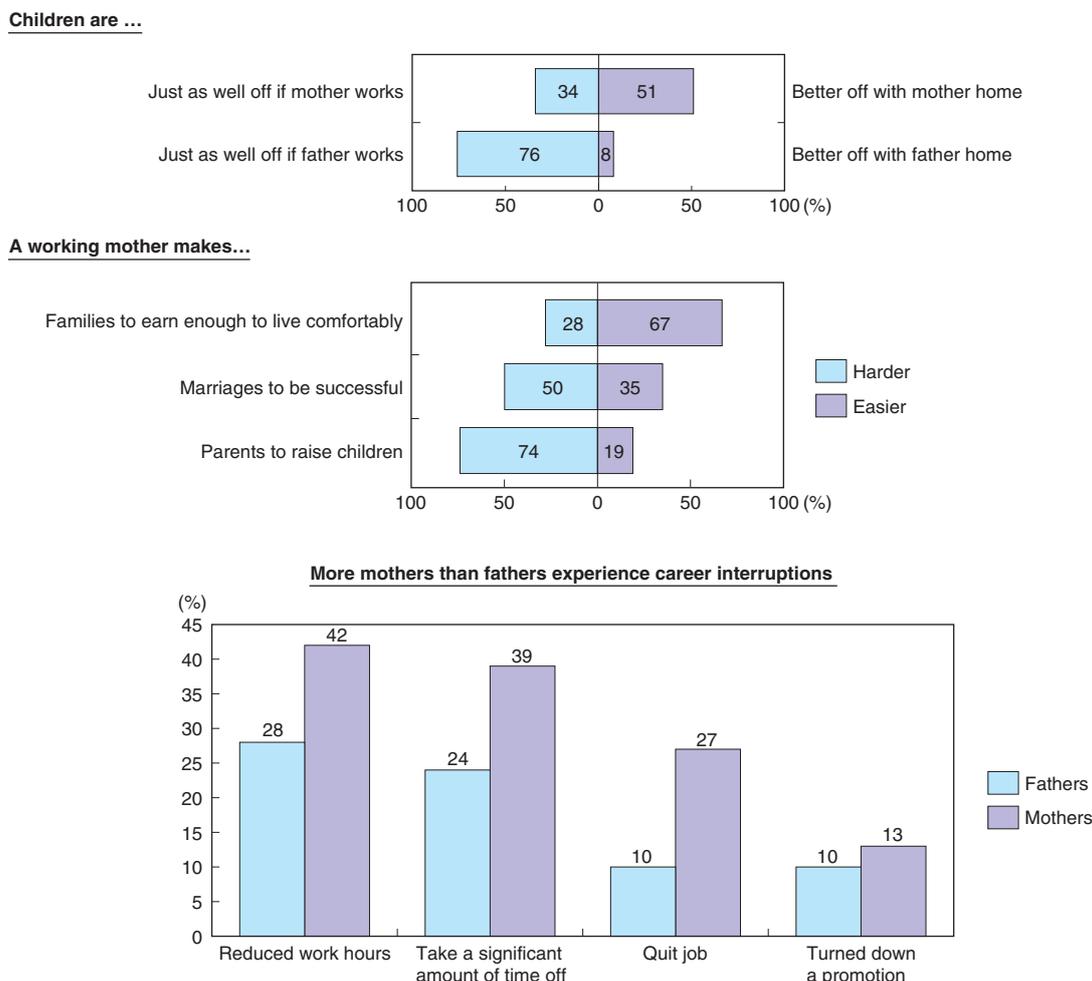
In the U.S., even today, stereotypes of “women being the main caretaker of a household” limit them from getting to the top of many corporations. One of the major reasons why women cannot rise to the top is that most women cannot work long enough to be promoted. According to George-Levi Gayle of Washington University, the probability that a female executive becomes CEO is half that of a man. One of the reasons for such low probability is that more women than men experience career interruptions in some form or other (Figure 2). In particular, many women take career breaks to raise children.

The fact that, along with Papua New Guinea and Swaziland, the U.S. is one of only three countries in the world that do not offer paid maternity leave is not unrelated to causing women to leave their jobs.

Often, a married woman is more likely to work part time or drop out even where she is more highly educated and has higher earning potential than her husband. More mothers than fathers experience career interruptions. It is much more likely for mothers to sacrifice work to care for a child or family members than it is for fathers. In any case, housework must be done, and women, rather than men, leave work to take care of family members. Actually, an analysis of data from the American Time Use Survey has found that the highest-earning female executives with small children spend 25.2 hours on childcare per week, while the highest-earning male executives spend 10.2 hours.

Another reason is that men are threatened by powerful women. A New York Times article explained that “heterosexual couples who both work are happier right up until the point where the female partner starts to out-earn her husband; then marital satisfaction dips and divorce rates increase.” Similarly, one study also found

Figure 2. Circumstances surrounding working mothers in the U.S.



Source: ThinkProgress, Bloomberg.

that men prefer women to be intelligent and ambitious only to the point where women threaten to earn more than they do. Even though a working mother can solve the family's financial issues, a large majority of men believe that the marriage itself ends up being less successful.

(Sources for the above statements include Pew Research Center, Bureau of Labor Statistics, CNN Money, NY Times and The Guardian.)

(2) “Glass cliff,” a new invisible barrier, in addition to the “glass ceiling”

In the U.S., many women have entered the workforce and have achieved great success in their careers. In 2013, women made up 46.8 percent of the U.S. labor force. While only 11.1 percent of managerial positions are held by females in Japan, the U.S. is ranked highest globally with 43.0 percent holding such positions. As such, nearly half of management positions termed “bosses” are held by women in the U.S. Although the share of female CEOs is currently 3.2 percent, it is forecast that by 2040, about one third of new CEO appointees will be women. These data give the impression that the U.S. is the country where women are promoted in the same way as men are. However, as the term “glass ceiling” suggests, American women still face many obstacles on the path to management. One study points out that the appointment of more female CEOs in recent years is not a result of breaking the “glass ceiling” but rather of running into the new invisible barrier of the “glass cliff.”

“Glass cliff” is a term that describes the appointment of women into high-powered roles at failing companies. On top of the fact that women are generally viewed as empathic, stereotypical attributes of women such as the ability to communicate effectively and encourage others are valued at times of crisis. There is expectation of a breakthrough or turnaround by switching from a male to female CEO. Because most companies are not familiar with the idea of developing a female executive within the company, female CEOs tend to be brought in from the outside. This strategy is beneficial to the company because those from the outside are easier to fire when their efforts at reform prove unsuccessful. In fact, 38 percent of women CEOs are forced out of their jobs as opposed to 27 percent of men. As in the case of Mary Barra, who was appointed CEO of General Motors when GM was in trouble over the recent recall issue, a newly appointed female CEO of a struggling company may become a victim of the “glass cliff” by receiving harsh criticism from the media, which plays a large role in making women appear less competent.

Even if women are able to get to the top, they are compensated much less than men in the same top position. The highest-paid female CEO in 2013 still made less than half of what the highest-paid male CEO made.

According to the Institute for Women's Policy Research (IWPR), female CEOs generally made less than 80 percent of what their male counterparts made in 2013, albeit up from 69 percent two years ago. As such, even in the U.S., where it appears much progress has been made in appointing women to leadership positions, invisible barriers still sternly remain.

(Sources for the above statements include the Bureau of Labor Statistics, Harvard Business Review, Forbes, New Yorker, and ThinkProgress, Bloomberg.)

(3) Consciously striving for workplace equality by enacting equal pay-related legislation

Americans are consciously making an effort to bring about workplace equality by implementing state-wide equal pay-related legislation. However, despite their equal education level, women currently earn less than men do. The Institute for Women's Policy Research forecast that the gender gap will not close until the year 2058. Even though women have increased their presence in higher-paying jobs traditionally dominated by men, they still continue to work in lower-paying occupations. Nevertheless, minimum wages are increasing across the country and some states are taking measures to bring changes more quickly.

For example, in 2013, equal pay-related legislation was enacted in 11 states. In New York, the Women's Equality Act was introduced. This Act not only addresses equal pay for the same job, but also prohibits employers from denying jobs or promotions to women because they have children. In Vermont, a law requiring equal wages regardless of sex also bans retaliation against employees who disclose their salaries (women are more likely to demand and get higher salaries if they know what others are being paid). In 2013, the mayor of Boston pledged to make Boston the “premier city for working women” and created the Women's Workforce Council. Boston is asking companies to voluntarily sign an agreement committing to take steps to reduce the wage gap. The Council's report also explains 33 different interventions that companies can take to close the wage gap. They include evaluating why mothers and non-mothers leave their businesses, standardizing compensation including bonuses and actively recruiting women to executive level and board positions.

(Sources for the above statements include the Institute for Women's Policy Research and the Pew Research Center.)

(4) Sharply rising cost of childcare; need to explore alternative childcare options without compromising quality

Awareness of the positive effects of working mothers has been spreading. With more affordable childcare options, more mothers will enter the workforce. However,

the cost of childcare is rising very quickly, and one of the key issues that must be addressed with working mothers is the cost and quality of childcare. Today, 48.6 percent of preschoolers with employed mothers are taken care of by parents or other relatives, 25.2 percent have their primary care arrangement through day-care centers, preschools or other organized facilities, and 12.9 percent are taken care of by non-relatives, which include individual services such as babysitters. In recent years, there are many available alternatives to traditional day-care programs, which are costly across all regions in the U.S.

In rural areas, since there are fewer childcare centers and licensed care providers, families tend to rely on informal childcare from neighbors and friends more often than in urban areas. Given these circumstances, a study found that the number of caretaker network sites a mother can utilize in finding affordable childcare has been growing across the country.

Aside from private-sector efforts, both federal and state governments are making investments in childcare programs to address the issue of the cost and quality of childcare. Forty states are investing over \$5.1 billion in pre-kindergarten programs for children who are 3-4 years old. The invested funds are used for about 28 percent of all 3-4 year olds in the states. The federal government invests almost \$8 billion annually in local Head Start programs. Head Start programs serve about 2/5 of all eligible children.

Other options include: (1) family day-care (operated out of the caretaker's home, she often cares for her own child at the same time); (2) babysitters (hired caretaker comes to the house of the family to look after the child); (3) nanny share (multiple families share one nanny to have their children taken care of); and (4) sitting co-ops (several families agree to take turns babysitting for each other's children).

(The source for the above statements is the Pew Research Center.)

(5) The share of stay-at-home mothers is increasing; a return to domesticity is seen among highly educated young women

The share of stay-at-home mothers is actually increasing. The proportion of stay-at-home mothers that was 23 percent in 1999 rose to 29 percent in 2012. In the same way as in Japan, mothers are often faced with the dilemma of choosing to work or to stay home.

The increase in the share of stay-at-home mothers is attributable to several factors. Some mothers want to stay home to take care of their children, and some mothers who do want to work stay home because they are unable to find a job that allows them to pay for high childcare costs. According to a survey conducted by the Pew Research Center, the largest proportion (44 percent) of stay-at-home mothers selected "the needs of my

children" as the reason for staying home, followed by "cost of childcare" (35 percent) and "the salary I earned did not justify the cost of working" (26 percent). Although there are various options on childcare, the average expenses for childcare rose more than 70 percent from 1985 to 2011. Nevertheless, the share of childcare cost as a percentage of family income has dropped significantly in recent years. There is simply not a good enough reason for mothers to shell out more money on childcare than what can be earned from working.

At the end of the 1990s, when stay-at-home mothers were at their rarest, the U.S. economy was creating so many jobs that most people who wanted work could find it. Today, even if these mothers do want to work, they are unable to do so. The share of stay-at-home mothers who say they are home "because they cannot find a job" increased from 1 percent in 2000 to 6 percent in 2012.

Aside from such a growing share of stay-at-home mothers, the noticeable trend in recent years is a return to domesticity among highly educated young women who had lucrative careers. The publication of *Homebound* by a Harvard graduate in 2013 is still fresh in our memory. Rather than being exhausted in the corporate world dominated by men, an increasing number of highly educated young women choosing to leave their usually lucrative jobs are opting into home-based lifestyles in pursuit of self-fulfillment, starting a business or exhibiting creativity in more relaxed lifestyles. At a glance, it appears that this trend is going against the times. Nevertheless, as long as the environment permits and if she has sufficient ability, a woman can choose to move away from the corporate world and live a more fulfilling life at home. This way of life may gain understanding from Japanese women.

(Sources for the above statements include the Pew Research Center and Ernest & Young.)

(6) Indie Women – Unmarried American women drawing attention as one of the fastest growing consumer segments

Currently, "Indie Women" are attracting attention as one of the fastest growing consumer segments in the U.S. (Figure 3). They are single, independent working women over the age of 27 who live alone. More such women are focusing on themselves and their careers before settling down to raise a family. Today, they constitute about a third of all adult women. They are the first generation of women to reverse the ceiling both in school and at work. They are very career oriented and put off marriage until later to focus on themselves. Currently, there are over 31 million Indie Women in the U.S. The number of Indie Women is estimated to exceed 40 million by 2020 and about 50 million by 2035.

More than 50 percent of Indie Women hold managerial positions in companies. They tend to have higher incomes than the average woman, and therefore are

Figure 3. Characteristics of an Indie Woman

- She is over the age of 27.
- She is not married, not living with a partner and without kids but interested in developing a family later in life.
- She is not afraid to spend money on herself; more likely to dine, entertain, buy apparel and home decor than are other women.
- She is well educated and work oriented, but also enriches her personal life through socializing and building community.



Indie Women influence the economy

- They contribute about \$1 trillion to the national economy:
 - \$22 billion on vehicles (5 times more than what “Indie Men” spend)
 - \$20 billion on entertainment
 - \$50 billion on food
- They aspire to luxury brands across categories like travel, apparel, jewelry and automobiles (Chanel, Prada, Ritz-Carlton, BMW, etc.).

Indie Women influence the web

- They learn about and promote products online, and are 6% more likely to look for online consumer ratings and reviews than are other women.
- They use a mobile device for social media and online shopping. They account for 35% of all traffic on mobile ad networks (women on average are less likely to click on a mobile ad than are men, 0.29% vs. 0.53%).
- They are thrifty shoppers. On a survey by Milo.com, 54% purchased from discount or flash-sale sites.

Indie Women influence others

- They are 12% more likely to say their friends ask them for health and nutrition advice than are other women.
- They are 10% more likely to be the first among friends to shop at a new store than are other women.
- They pay close attention to others’ experiences. When shopping, 23.4% were swayed by online reviews, while 18.6% were swayed by in-store sampling and recommendations by friends.

Sources: Compiled based on NBCUniversal, Adweek, Total Beauty Media Group, Milo.com. and InPerspective.

some of the biggest spenders. Indie Women contribute about \$1 trillion to the national economy and spend more per capita than any other type of woman on dining out, shelter (rent or mortgage), home furnishings, new cars and car leases, recreation, entertainment and apparel. They are tech savvy and like to hunt for great deals and bargains.

In Japan, unmarried women are apt to be labeled with the negative nickname of “ohitorisama (meaning one person).” Nevertheless, they are attracting attention as targeted consumers in Japan as well. Indie Women in the U.S. could serve as a good example of something that was brought about as a result of women’s empowerment.

(Sources for the above statements include NBCUniversal, Penn State University and SheKnows Media.)

2 Chinese women: Strong, forward-thinking, Chinese women face gaps between traditional and new values

(1) A state policy of promoting gender equality in the labor market led to the rise of strong and forward-thinking Chinese women

Many Chinese women are highly motivated to work and are financially independent. According to the World

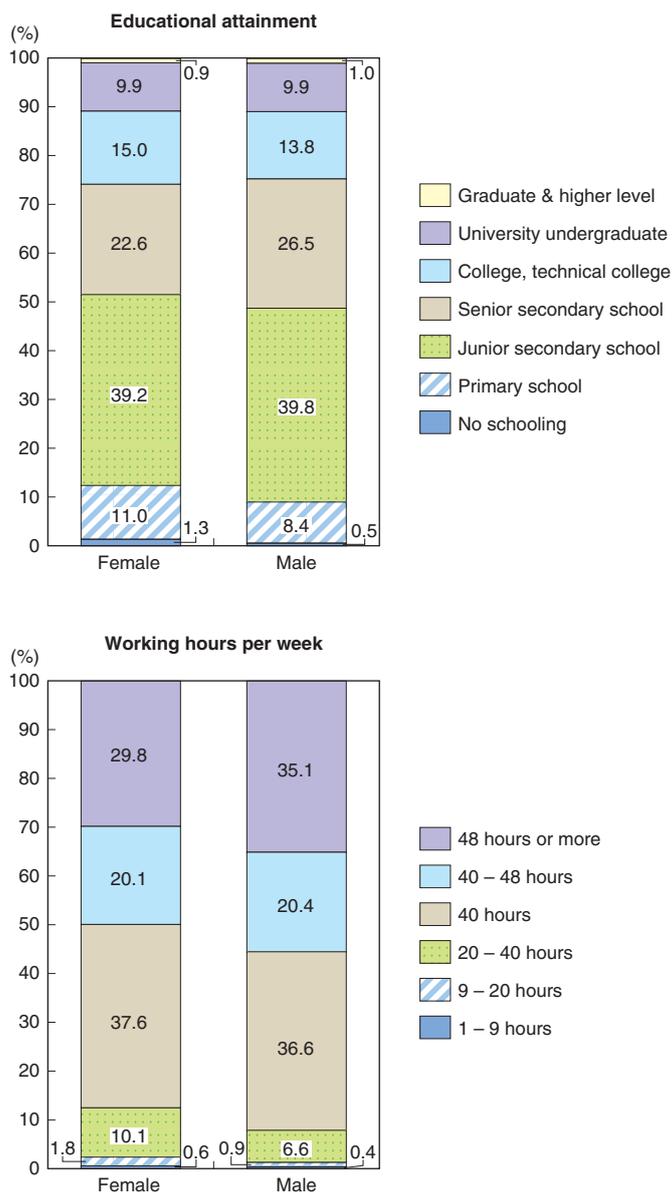
Bank, the female labor force participation rate (the proportion of the female population ages 15 and older that is economically active; the number of women who lost their ability to work was not subtracted from the population) is overwhelmingly high among BRICs, which remains at over 65 percent. While the proportion has slowly declined in recent years, such decline is largely attributable to aging, so the figure remains essentially unchanged.

Since its foundation, the People’s Republic of China has had a basic state policy of promoting gender equality in the labor market. Given this policy, Chinese women born and raised in a society where workplace gender equality is upheld are generally highly motivated to work even after marriage and childbirth, not only for economic reasons but also for self-fulfillment.

According to the report of the 2012 online survey of Chinese women at workplaces before and after childbirth, the proportion of respondents who “have never thought of” being stay-at-home mothers was 62 percent. As for the reasons, the largest number of respondents selected economic reasons, followed by “I don’t want to be separated from society” and “I’m working by seeking what I want to do or in pursuit of the ideal.”

A look at educational attainment and working hours reveals no significant difference between working men and women (Figure 4). While the proportion of men

Figure 4. China: Comparison of working conditions between males and females in 2013



Note: Because percentages were rounded to one decimal place, there are cases where the total does not equal 100.
 Source: Compiled based on “China Population and Employment Statistics Yearbook 2013.”

who work 48 hours or more per week was slightly higher than that for women, there was almost no difference between men and women in terms of educational attainment. In addition, the proportion of Chinese women appointed to managerial positions in companies has remained at more than 30 percent for three consecutive years. With the percentage of female CEOs being 19 percent, the appointment of women to important positions in companies meets with relatively little resistance.

(2) The median age at first marriage has been rising in urban areas; an increasing number of men will be unable to find wives

In China’s large urban regions, the average age at first marriage has been rising in recent years. In 2013, the average age at first marriage in Shanghai was 30.2 for men and 28.2 for women, up from 28.6 for men and 26.4

for women in 2007. Given that the age in 2013 in Japan was 30.9 for men and 29.3 for women, the phenomenon of late marriage at almost the same level as that in Japan has been occurring in China’s large cities. This trend is projected to expand from Tier-1 cities such as Shanghai and Beijing to Tier-2 cities.

The fundamental cause of late marriage comes from the fact that in China, there are about 15 million more men aged 20 – 39 (marriageable age) than there are women in the same age bracket. With growing gender imbalance, it is projected that there will be 30.55 million more men than women by 2031, and the number of men who will be unable to find brides will increase considerably. On top of this gender imbalance, further complicating the issue is that Chinese women are highly oriented toward self-fulfillment and place less emphasis on traditional Chinese values, which gives

rise to a trend in which low-income men are unable to find wives. China has promoted gender equality in the workplace as one of its key policies. Even so, a traditional gender perspective still remains. For example, to be eligible for marriage, men have to buy a house, and women do not want to marry men earning less than they do. Such being the case, in urban areas where more and more women are achieving career success, the number of women choosing not to marry is increasing, accelerating the problem of men being unable to marry.

(3) Rise in wages of rural migrant workers who supported two-income families led to an increase in the number of stay-at-home mothers

Despite significant progress in female labor force participation, the number of stay-at-home mothers has been increasing in large cities such as Tier-1 cities. For example, according to a survey of 6,000 working women, which was conducted by the Kaixin social network in 2011, more than 20 percent of respondents said they intend to take three years off from work after having a baby.

Because of the age limit imposed in China for entering kindergartens, public kindergartens only accept children older than 3 years. Therefore, a household where both parents work must rely on grandparents or a babysitter for childcare until the child becomes 3 years old. However, in recent years, the wages of babysitters have been soaring. At the end of May 2014, China's human resources research organization announced the ranking of large cities for the first half of 2013 in terms of average monthly salaries. According to this list, Shanghai ranked first with an average monthly salary of 7,112 RMB, followed by Shenzhen with 6,787 RMB, Beijing with 5,453 RMB and Guangzhou with 4,917 RMB. On the other hand, even though wages differ depending on a babysitter's work experience and/or the license/certification that a babysitter has, a babysitter's average monthly wage is between 5,000 – 10,000 RMB. This high childcare expense makes working less justifiable. Given this situation, the number of mothers who temporarily leave their jobs for three years after childbirth and stay home to care for their children has been on the rise.

In addition, in urban areas where a new perception of value is prevalent, there is an increasing number of cases where grandparents who are usually expected to look after their grandchildren and parents do not choose to live together because of different lifestyles. As such, it has become difficult for parents to expect grandparents to provide childcare support.

(4) Seeking more flexible work arrangements – An increasing number of women start online businesses

Facing the situations described above, the number of women who work at home such as in the form of remote offices has been increasing. In particular, new types of occupations have recently emerged, which include

female online store owners and buyers. These new ways of working, which enable women to work wherever the Internet infrastructure is available without limiting the place of work to specific locations, have been gaining popularity in urban areas. In China, the number of online stores has been increasing and reached 83 million in 2012, of which 46 percent were run by female owners.

According to a joint survey by Peking University's Research Center for Chinese Society and Development and Alibaba, a Chinese online retailer, China's online stores are concentrated in eastern coastal areas. Most owners are young people born in 1981 – 1994, accounting for 80 percent of all owners. Ninety percent of these young owners are those who received senior high school or higher education, and 60 percent are those who received technical college or higher education. About 65 percent of young owners operate online stores as a side job, of which 37 percent are white-collar workers, 6 percent are students and 6 percent are stay-at-home mothers. The remaining 35 percent operate online stores as a full-time job. Many of those who run online stores as a side job are doing so in the hope of not only increasing their income but also experiencing new ways of working. Furthermore, online stores operated as a side job are generally small in size, with invested funds being limited to somewhere around 5,000 – 30,000 RMB.

In the future, competition among online retailers will intensify because of a greater number of online stores, improved quality of products handled and more convenient delivery service. As a result, the online business landscape will change, which will adversely affect the ease of starting a business and increase the difficulty in surviving. Nevertheless, for Chinese women who are highly oriented toward self-fulfillment and face the situation in which it has become difficult to balance career and childcare, there is no doubt that online business is an attractive new way of working.

III Comparison of Japanese, American and Chinese Women in Terms of Perceptions and Ways of Working

1 Among the three countries, Japanese women show the lowest level of acceptance of traditional gender roles

In Japan, with an increasing number of women in the workforce, more and more men are participating in domestic chores and child rearing as represented by the Japanese term "ikumen," which means men who are taking an active role in ikuji, or child rearing. As such, gender bias in the division of labor has become less

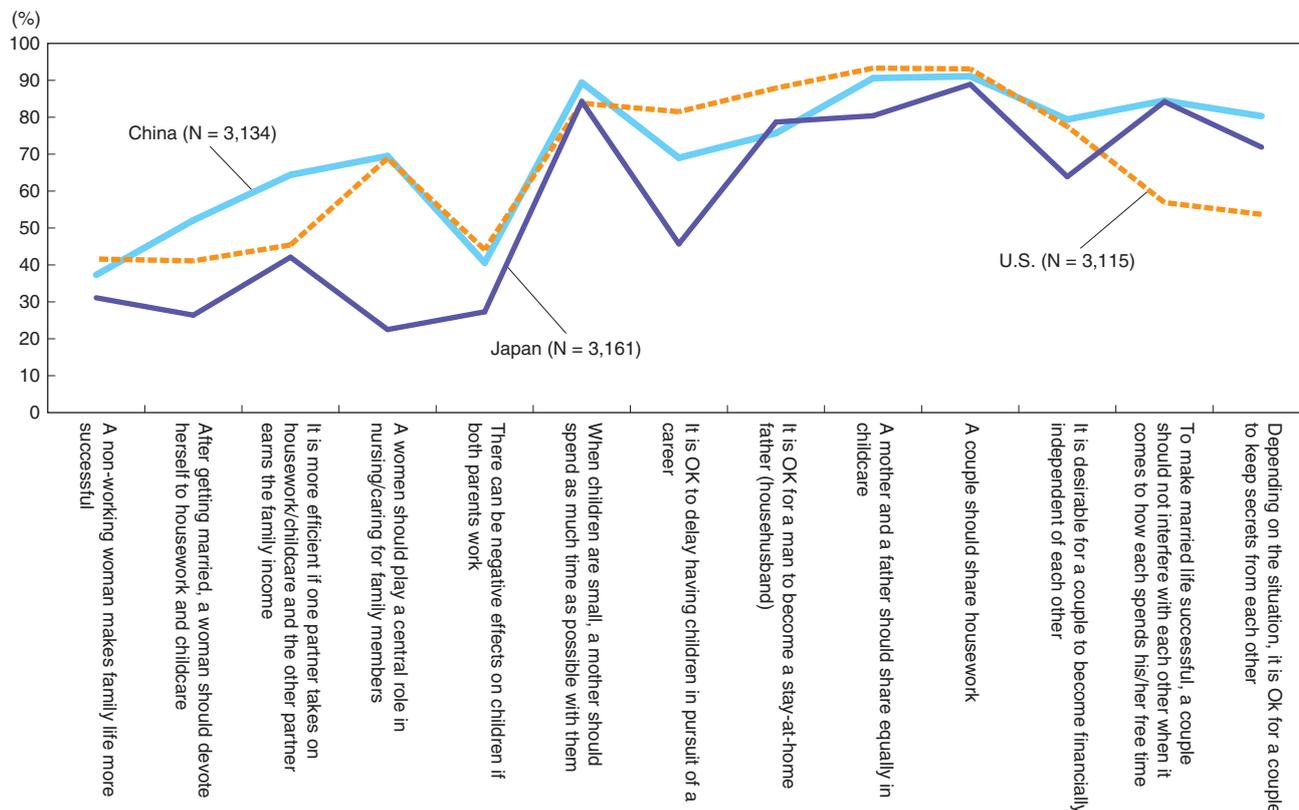
conspicuous. According to a survey of “Japanese Value Orientations” conducted by NHK (Japan Broadcasting Corporation), the proportion of respondents who answered “a woman should devote herself to looking after her family after getting married,” which was 35 percent in 1973, decreased to 11 percent in 2013. In contrast, the proportion of those who answered “a woman should continue working even after childbirth” increased from 20 percent to 56 percent.

This three-country survey revealed that as compared to the U.S. and China, depending on the content of an item, Japan showed the smallest percentage of respondents who embrace traditional gender roles. For example, as shown in Figure 5, a far smaller percentage of Japanese respondents than their American and Chinese counterparts said “agree” or “somewhat agree” to the items of “a women should play a central role in nursing/caring for family members” and “a woman should devote herself to housework and childcare after getting married.” Many Japanese respondents had a negative opinion regarding gender role stereotypes, i.e., “how women should be.” As for items such as “a couple should share household chores” and “a mother and a father should share equally in childcare,” there was no significant difference between Japanese respondents and their American/Chinese counterparts, which

suggests an increasing awareness of gender equality among Japanese respondents. At the same time, many Japanese respondents support the idea of a two-income household, as suggested by a smaller proportion of Japanese respondents who agreed to items such as “a non-working woman makes family life more successful” and “there can be negative effects on children if both parents work” than that of American and Chinese respondents. Nevertheless, the proportion of Japanese respondents who agreed to “it is desirable for a couple to become financially independent of each other” is also smaller than that of the two other countries. It is considered that these findings come from a strong tendency of assuming a secondary wage earner as a wife’s way of working such as part-time workers, which is explained in Section 2 below.

Furthermore, as compared with the other two countries, a considerably smaller percentage of American respondents agreed to “to make married life successful, partners should not interfere with each other when it comes to how each spends his/her free time” and “depending on the situation, it is Ok for a couple to keep secrets from each other.” As revealed by this result, it is interesting to learn of the different ways of thinking in each country as to what constitutes the necessities of happy married life (Figure 5).

Figure 5. Perceptions of gender roles (total percentage of “agree” and “somewhat agree” responses from among four choices)



Source: “Online Consumer Survey in Japan, the U.S. and China” conducted by Nomura Research Institute in August 2014

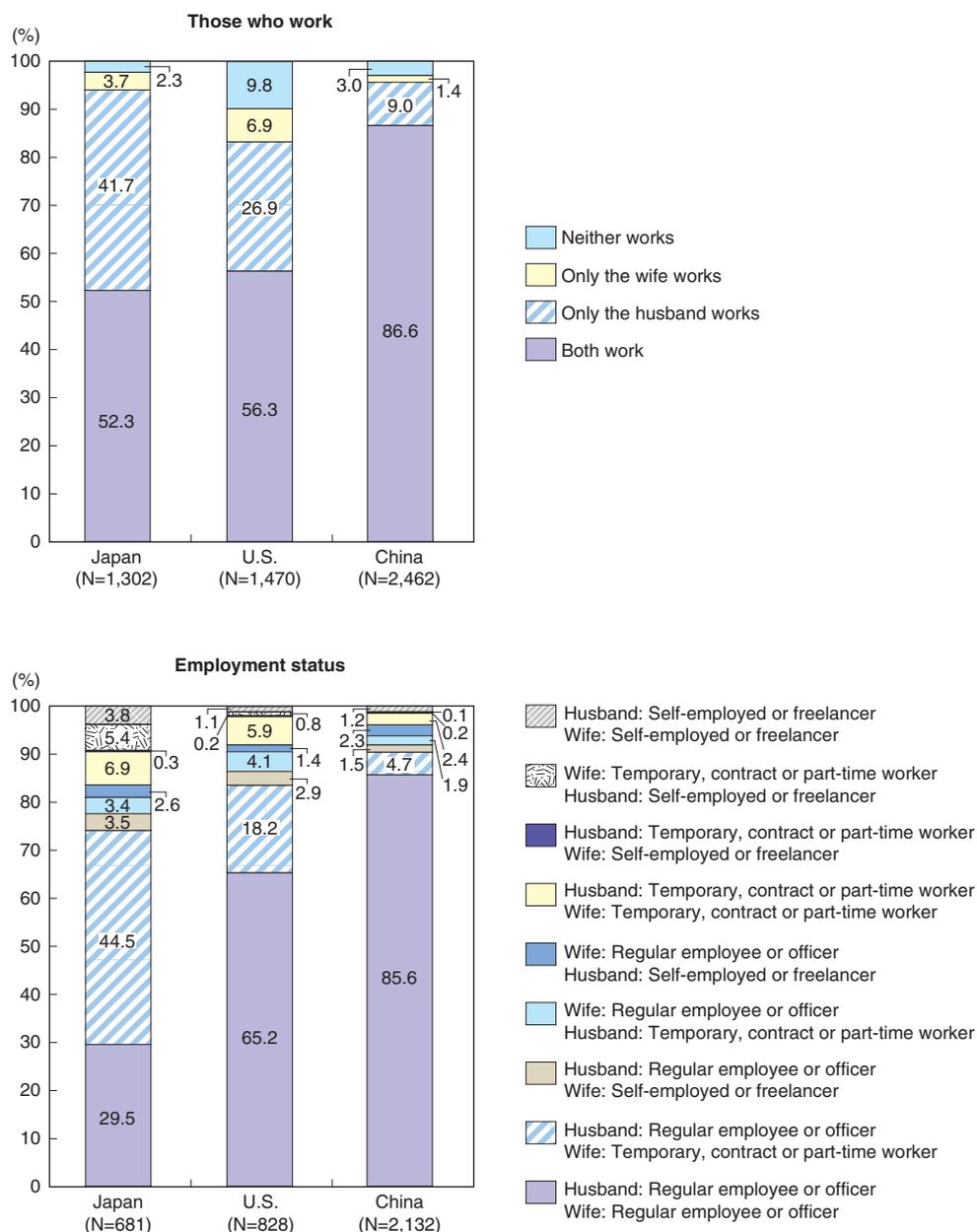
2 As compared to the U.S. and China, Japanese working couples with the wife being the secondary wage earner constitute the mainstream

Many Japanese people object to traditional gender roles, i.e., “the man works and the woman takes care of the family.” Nevertheless, when it comes to the actual ways of working, a different aspect is seen. While the number of couples where both choose to work is on the rise, this three-country survey revealed that the highest proportion (41.7 percent) where “only the husband works” as a couple’s working status was in Japan. In China, the proportion of “both husband and wife work”

was considerably high at 86.6 percent. In the U.S., the proportion of “both have no jobs” (student couples were included in American respondents) was slightly higher than that in the other two countries. A look at the way of working among working couples revealed the highest proportion (85.6 percent) of Chinese working couples with both partners being regular employees (double primary wage earners). In contrast, Japanese working couples with the husband being the regular employee and the wife being a temporary, contract or part-time employee (a secondary wage earner) accounted for a noticeably large share at 44.5 percent (Figure 6).

Regarding the wife’s way of working when the need arises for childcare or nursing care, the common idea

Figure 6. Couple’s working status



Notes: Survey subjects are married couples aged 20 – 59. Because percentages were rounded to one decimal place, there are cases where the total does not equal 100.

Source: “Online Consumer Survey in Japan, the U.S. and China” conducted by Nomura Research Institute in August 2014

among the three countries is revealed by the largest proportion of both male and female respondents in each country selecting “temporarily decrease the pace of work by taking childcare/nursing care leave or reducing working hours.” In Japan, the proportion of respondents who selected “work shorter hours such as by changing to a part-time job” or “quit a job depending on spouse’s employment status and family situation and become a stay-at-home mother” was both higher at more than 20 percent than that in the other two countries. In contrast, as to the husband’s way of working, a “work full-time plus overtime regardless of the need for childcare or nursing care” response accounted for a far greater proportion in Japan and the U.S. than in China. Thus, there is a strong tendency in Japan in which more women than men give up their careers to care for children or family members.

The Organization for Economic Corporation and Development (OECD) publishes the “OECD Employment Outlook” annually, which reviews labor market trends, policies and prospects in 34 OECD member countries. In its 2014 report, the OECD urged Japan to remedy large gender differences in employment. Today, young women are more likely to complete a higher degree of educational attainment than are men. Nevertheless, the difference between the male and female labor force participation rates is 5 percentage points higher than the OECD average. The gender pay gap at median earnings is the second highest in the OECD. Furthermore, the report indicates that the female manager ratio is far below that of other countries, pointing out the need to boost women’s economic empowerment. Other international research reports also published data indicating that the smaller the gender gap, the more affluent the country, and that the greater the economic empowerment of women, the higher the company’s productivity. These data endorse the need for increasing the number of women in leadership positions in Japan.

To ensure the active participation of women in the workforce, many Japanese and American female respondents to this three-country survey strongly hoped for the elimination of the practice of “working for long hours” as well as for enhancing childcare support services and reducing associated expenses. Their Chinese counterparts wished for a results-based system for performance appraisal that does not rely on the number of work hours, as well as for offering maternity leave and childcare leave. These hopes and wishes clearly reflect the current status of American women and Chinese women, which were explained in this chapter. Other desires that Japanese women expressed in this survey include developing a system for part-time workers, reforming men’s ways of working and thinking, eliminating differences between full- and part-time workers and doing away with preferential tax treatment for stay-at-home wives such as eliminating tax benefits for full-time homemakers.

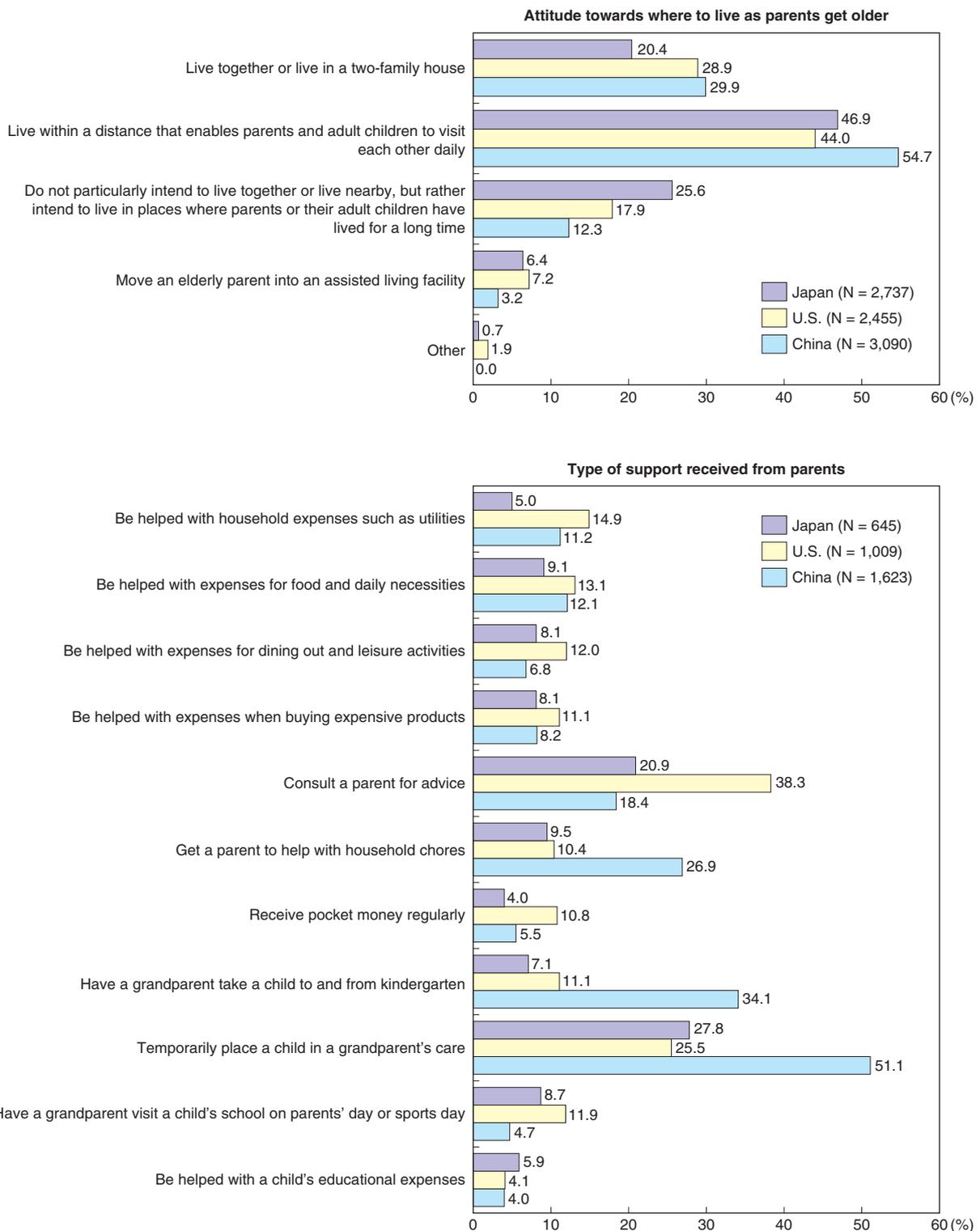
3 To what extent can parental support be expected?

Even though the Japanese government has been taking urgent measures to increase the number of childcare facilities and enhance childcare support services, the facilities and services are still far from sufficient. Given such shortages, in order to return to the workforce, women in the childrearing phase often seek the support of their parents. Actually, women who live together with or next door to their parents or live within a distance that enables them to visit each other daily show a higher labor force participation rate. Nomura Research Institute (NRI) has introduced the concept of “invisible families” where family members who do not live together but live next door or nearby support each other both financially and emotionally. They are interdependent on each other for time and labor in terms of housework, childcare, nursing care, etc.

The survey on the attitude toward where parents and their adult children should live revealed that the proportion of respondents wishing to live next door or nearby who selected the item of “live within a distance that enables them to visit each other daily” was high at approximately 50 percent in all three countries (Figure 7). The question was asked of respondents aged 49 or below with children about the content of support received from their parents. In the U.S., the proportion of respondents who receive psychological support (“consult parents for advice”) and that of those who receive financial support by being helped with household or leisure expenses were higher than in the other two countries. On the other hand, in China where it is common for grandparents to care for their grandchildren, the proportion of those who receive support for housework and childcare was notably high, as suggested by a large proportion of respondents selecting items such as “get a grandparent to help with household chores,” “have a grandparent take a child to and from kindergarten” and “temporarily place a child in a grandparent’s care.” Overall, among the three countries, Japanese respondents received the lowest level of support from their parents in terms of many of the items listed.

Interestingly, among the three countries, the proportion of Japanese respondents who wish to “live together or live in a two-family house” was the lowest, but the proportion of those who “do not particularly intend to live together or live nearby, but rather intend to live in places where parents or their adult children respectively have lived for a long time” was the highest. The background factors behind these findings include Japan’s severe housing conditions as compared to the U.S. and the difficulty in switching jobs, which leads to the situation where one’s place of work limits one’s place of living to some extent. Aside from these factors, the results suggest that both parents and adult children have a strong tendency to place emphasis on territorial relationships.

Figure 7. Support for and from parents



Note: For the type of support received from parents, respondents were limited to those aged 49 or below with children.
 Source: "Online Consumer Survey in Japan, the U.S. and China" conducted by Nomura Research Institute in August 2014

According to the results of the NRI Questionnaire Survey of 10,000 Consumers conducted triennially since 1997, in the past, the proportion of respondents who wished to live next door or nearby had grown. However, recently, this proportion has ceased to grow. Because of factors such as the housing environment, respective personal reasons and differences in value

orientations between parents and adult children, it is no longer the case that all child-rearing households are given unlimited support from parents. Supporting each other among family members is no doubt one of the most practical options. Nevertheless, it is a pressing issue for the government to provide other childcare options.

IV Suggestions for “Women’s Empowerment” in Japan

1 Reasons why Japanese women remain secondary wage earners

(1) In Japanese society, the form of “the man works and the woman takes care of the family” results in large financial benefits and entails little risk

The first reason Japanese women remain secondary wage earners stems from the significance of the financial benefits that are realized as a household or from the low probability of incurring risks. What comes to mind when we think about financial benefits is the government’s plan to reform the system of tax deductions such as the spousal tax deduction, which is now under consideration for review in 2017. Besides this issue, this section considers the characteristics of Japan’s labor market.

Currently, in order to pursue an advantageous life path in Japan’s labor market such as receiving high ratings in performance appraisals and being promoted to higher positions, employees must work long hours and should not say “no” to working overtime, making a number of business trips and/or accepting a post that requires living apart from their family. Japan’s labor market, where working long hours is considered common and virtuous, hinders women from balancing family and work life. This way of thinking is shared in the U.S. Dr. Anne-Marie Slaughter, a professor of politics and international affairs, left her position of power as director of Policy Planning for the United States Department of State to spend more time with her children. In her article “Why Women Still Can’t Have It All,” she pointed out the difficulty of balancing family and work life in today’s professional society in which what she calls the culture of “time macho” (relentless competition to work harder) remains astonishingly prevalent.

Returning to the same workplace or even the same job after childbirth still poses many challenges in Japan as it does in the U.S. In Japan, a legal framework for support programs such as childcare leave and shorter working hours has been introduced. Nevertheless, in actuality, it is sometimes the case that the workplace atmosphere is not conducive to taking childcare leave, or that women hesitate to take such leave because they are concerned that doing so might negatively affect their rating in performance appraisals or might harm relationships with colleagues.

What is making the situation worse is an inflexible working environment that causes large gaps in many aspects. Currently, in Japan, the number of non-regular workers, both male and female, has been increasing. The wage gap between regular and non-regular employees increases significantly as they get older. This is because it is often the case with regular employees that

their wages increase according to their length of service (seniority wages). Another traditional practice that contributes to an inflexible working environment is lifetime employment, causing many regular workers to choose to not switch jobs. That is, whether one is hired as a regular employee right out of university largely determines one’s subsequent career path, making a mid-career job change difficult.

If a woman who works as a regular employee takes maternity leave, it is difficult for her to return to regular employment. The large influx of skilled workers including women having experience as regular employees into the labor market for non-regular workers enables employers to have access to a large pool of talented workers at lower cost. The availability of a high-skilled, low-cost workforce results in a reduction in the number of regular workers and deters employers from improving wages and other employment conditions for non-regular employees. Such being the case, for men, maintaining a life course as a regular employee has gained in importance. At the same time, the division of labor by gender where a man works long hours and a woman takes care of the family has become more pronounced. Considering these trends, it appears that Japan is trapped in a vicious spiral.

Given that a system of progressive income taxation has been adopted in Japan, and supposing the household income is the same, a couple consisting of a “husband and wife both earning middle income” can benefit from higher disposable income than can a couple consisting of a “husband with high income and wife with low or no income.” Despite this benefit, the gender division of labor that does not contribute to striking a healthy work-life balance is prevalent where the man is the sole breadwinner and the woman is the sole homemaker. The reason why this imbalanced division of labor is prevalent is assumed to be that worries over incurring risks of being unable to survive in a labor market where working long hours is considered common and virtuous (if both a husband and wife choose to work to achieve work-life balance), outweigh advantages in terms of disposable income. That is, there are cases in which couples have no choice but to select the form of “woman = secondary wage earner” because of the structure of the labor market where this form results in large financial benefits (a higher household disposable income) and entails little risk of dropping out of an advantageous life course.

(2) In view of true intentions, many families actually wish for a comfortable home cared for by a woman

Another reason why Japanese women remain secondary wage earners is that there appear to be many families in which women choose to place higher priority on home and family based on their notion of value as their true intention. Table 2 lists the top three types of men and women selected by Japanese, American and Chinese male and female respondents respectively in response to

Table 2. What kind of person do you want a man/woman to be?

What kind of person do you want a man to be?

	First	Second	Third
Japanese male respondents	Person who can make the best use of free time such as hobbies and leisure activities: 33%	Family-oriented person who works moderately hard and gives high priority to family life: 26%	Person who has ability superior to that of other people and uses such ability to earn an income: 24%
Japanese female respondents	Family-oriented person who works moderately hard and gives high priority to family life: 35%	Person who has ability superior to that of other people and uses such ability to earn an income: 34%	Person who can make the best use of free time such as hobbies and leisure activities: 26%
American male respondents	Family-oriented person who works moderately hard and gives high priority to family life: 34%	Person who has ability superior to that of other people and uses such ability to earn an income: 33%	Person who can make the best use of free time such as hobbies and leisure activities: 24%
American female respondents	Family-oriented person who works moderately hard and gives high priority to family life: 48%	Person who has ability superior to that of other people and uses such ability to earn an income: 32%	Person who can make the best use of free time such as hobbies and leisure activities: 18%
Chinese male respondents living in urban areas	Talented business person earning high income: 39%	Person who can make the best use of free time such as hobbies and leisure activities: 33%	Highly talented entrepreneur: 32%
Chinese female respondents living in urban areas	Talented business person earning high income: 38%	Person who can make the best use of free time such as hobbies and leisure activities: 35%	Family-oriented person who works moderately hard and gives high priority to family life: 29%

What kind of person do you want a woman to be?

	First	Second	Third
Japanese male respondents	Family-oriented person who works moderately hard and gives high priority to family life: 27%	Stay-at-home mother who maintains a warm and comfortable family home: 20%	Person who can make the best use of free time such as hobbies and leisure activities: 20%
Japanese female respondents	Person who can make the best use of free time such as hobbies and leisure activities: 31%	Home-based person who interacts with other people through teleworking or hobbies, which contributes to greater social connectedness: 27%	Family-oriented person who works moderately hard and gives high priority to family life: 27%
American male respondents	Superwoman who strikes a perfect work-family balance: 28%	Family-oriented person who works moderately hard and gives high priority to family life: 28%	Person who has ability superior to that of other people and uses such ability to earn an income: 21%
American female respondents	Family-oriented person who works moderately hard and gives high priority to family life: 39%	Superwoman who strikes a perfect work-family balance: 37%	Person who has ability superior to that of other people and uses such ability to earn an income: 26%
Chinese male respondents living in urban areas	Superwoman who strikes a perfect work-family balance: 42%	Family-oriented person who works moderately hard and gives high priority to family life: 28%	Home-based person who interacts with other people through teleworking or hobbies, which contributes to greater social connectedness: 26%
Chinese female respondents living in urban areas	Superwoman who strikes a perfect work-family balance: 48%	Person who can make the best use of free time such as hobbies and leisure activities: 31%	Family-oriented person who works moderately hard and gives high priority to family life: 25%

Source: "Online Consumer Survey in Japan, the U.S. and China" conducted by Nomura Research Institute in August 2014

the question "what kind of person do you want a man/woman to be." The larger proportion of Japanese respondents, both male and female, selected the types of women who place emphasis on personal life such as family life and hobbies. In contrast, the proportion of Japanese male respondents who want a woman to be "a talented career-oriented woman who works just as hard as a man or even harder and earns a high income" was small at 7 percent, with 9 percent of Japanese female respondents selecting this type. These percentages were lower than those in the other two countries. While many American and Chinese male and female respondents selected "a superwoman who strikes a perfect work-family balance," this type did not rank in the top three in Japan.

These findings indicate that Japanese people are not strongly motivated to pursue a "perfect balance" between work and family life.

In conclusion, among the three countries, the largest proportion of respondents who do not agree with the concept of division of labor by gender was in Japan. Nevertheless, the type of woman that was favorably accepted by many Japanese respondents, both male and female, was a woman who places higher priority on family life. There could be many ways of looking at this incongruity. For example, this incongruity could be attributed to the difference between principles and real intentions. Other interpretations include that placing higher priority on family is an unavoidable choice forced

by the social structure, as explained in Item (1). Or, this incongruity could be seen as the difference between the general and the specific where the general is “women should not be forced to be stay-at-home mothers as social norms,” while the specific is “our family chose a stay-at-home mother of our own free will.” The survey findings suggest that currently, in Japan, many families want women to give their highest priority to their families, and women themselves also want to do so.

2 How best to boost women’s empowerment in Japan

(1) Best solutions differ from country to country

The social environment that should be developed to boost women’s empowerment depends greatly on the notion of value inherent in a country and the current situation that is the result of many activities and efforts over a long period of time. The Nordic countries are known for gender equality and a high female labor force participation rate. These countries have made it possible for both women and men to strike a better work-life balance by encouraging more shared participation in work and household chores, shorter working hours and the use of childcare leave. Because gender equality is a fundamental value in the Nordic countries, these countries provide enhanced job security, welfare and childcare services to support working women. Benefitting from such enhanced social and welfare services entails high tax burdens, which negatively affects the economic practicability of being stay-at-home mothers.

For example, although the Netherlands moved to adopt the Nordic model of gender equality, the country faced difficulties in doing so because the childcare services were insufficient and the cultural conviction that women should stay at home to care for their children prevailed. Subsequently, the Netherlands has introduced equal treatment legislation ensuring equal pay and equal social benefits for part-time and full-time workers. This legislation has enabled every employee, both men and women, to tailor their working hours to their needs. Consequently, the rate of female employment in the Netherlands has risen sharply.

(2) Enabling men to attain a better work-life balance

Given Japan’s value orientations and current situation that were revealed through this survey comparing three countries (Japan, the U.S. and China) in terms of women’s perceptions and ways of working, consideration is again given to how best to develop the environment to boost women’s empowerment, which is a necessity in Japan’s future society. It is thought that in addition to support programs currently being promoted for working women such as achieving the goal of zero children on waiting lists to get into nurseries and expanding childcare leave to three years, a scheme to enable men to

attain a better work-life balance should gain in importance. In other words, the first step toward the goal of enhancing women’s empowerment is for men to return to the family. Aside from support for working women to attain a balance between career and family, support must first be provided to enable a man who shares family responsibilities with a woman to achieve a work-life balance. Social systems must be created in such a way that men who share household work are not at a disadvantage in terms of career paths and performance appraisals.

It has been a long time since we started to hear the term “ikumen (childrearing men).” Nevertheless, the ratio of men taking childcare leave remains very small, at 1.89 percent. Even within this small fraction of men, more than 80 percent took “less than one month” of leave. With such a short period, we cannot help but feel uncertain about the extent to which a man can participate in raising children. It is also true that the proportion of men who wish to take childcare leave has reached 31.8 percent. This figure suggests that there are many men who want to take childcare leave, but who are unable to do so because of a lack of understanding in the workplace or because they are concerned about negative effects on their performance appraisals.

Consider the case of France. This country has recently achieved a remarkable recovery in its birth rate while maintaining a high female employment rate. In France, men are increasingly more involved in housework. A comparison of Japanese and French full-time male workers revealed a large difference in terms of the amount of time spent on household chores during weekdays (working days). While French men spend more than one hour a day, Japanese men spend only 10 minutes. What we learn from the situation in France is that a society in which both men and women spend time on household chores and childcare as a matter of course and help each other is necessary to boost female labor force participation as well as to raise many happy children.

(3) Creating a society that enables men and women to share household duties and childcare as they wish

In the U.S. and China where the survey was conducted, attention is also given to the achievement of a good work-life balance as a solution to promote women’s empowerment. Of course, measures to promote the ways of working that impart more flexibility in terms of working hours, such as remote working and starting online businesses, would constitute an important part of this solution. Other solutions that can be applied to Japan where the number of non-regular workers has been on the rise, leading to growing income inequalities, could include the one adopted in the Netherlands, which guarantees equal treatment in terms of wages and social security benefits regardless of the form of employment

(part-time or full-time workers) and increases the level of freedom to choose the way of working. Recently, cases of raising awareness of persons holding managerial positions have appeared in which “iku-boss” (a boss who understands and encourages the involvement of male employees in childcare) has been developed in order to support younger male employees who place emphasis on finding a better work-life balance and are striving to participate in childcare.

To help employees achieve a better work-life balance, it is important to draw the attention of employers to the advantages of implementing work-life balance initiatives. To enhance work-life balance through measures such as short working hours and remote working, company-wide efforts must be made to increase productivity. These efforts include those to ensure smooth information sharing within a company, quick decision making and effective teamwork and collaboration. If a company could achieve these goals, it could preclude talented employees from being forced to quit their jobs not only for childcare but also for family nursing care, bringing advantages to the company in terms of human resource management. For Japan, which faces an increasingly serious issue of caring for the elderly as we enter a super-aging society, a higher priority should be given to how best to achieve an enhanced work-life balance.

3 Expected effects include increased consumption and improved life satisfaction

(1) Women’s awareness of being breadwinners will stimulate their spending

More equal division of labor by gender will lead to economic growth. In advanced countries, generally, the greater the degree of gender equality, the higher the growth rate of GDP per capita. Higher GDP growth can be achieved because female workers boost domestic demand and because productivity increases by utilizing women’s diverse abilities and viewpoints and stimulating competition to get jobs.

In Japan as well, by getting out of being secondary wage earners, Japanese women could play a large role in boosting consumption. Currently, the number of families where both husband and wife work has been increasing in the face of a prolonged economic downturn and as encouraged by social support programs for working women. Some women state that they started working in the wake of the April 2014 consumption tax hike and to cope with the high cost of living due to factors such as yen depreciation. Nevertheless, the current situation is that they are motivated to work simply to help out with household expenses, and they are less willing to use earned income for their own pleasure.

If gender bias in the division of labor with the wife as primary homemaker/secondary wage earner and the

husband as primary wage earner/secondary homemaker is redressed, such a bias-free society will increase women’s awareness as breadwinners in the same way as that more and more men are becoming aware of their family responsibilities as signified by the term “ikumen.” As a result, the tendency for women to use earned income for themselves is projected to increase. Women (both married and unmarried) who enjoy shopping in the same way as Indie Women (independent women) do will certainly stimulate personal spending.

(2) “Super DEWKs” showing a higher propensity to consume are on the rise with an associated expansion of “consumption driven by leisure activities”

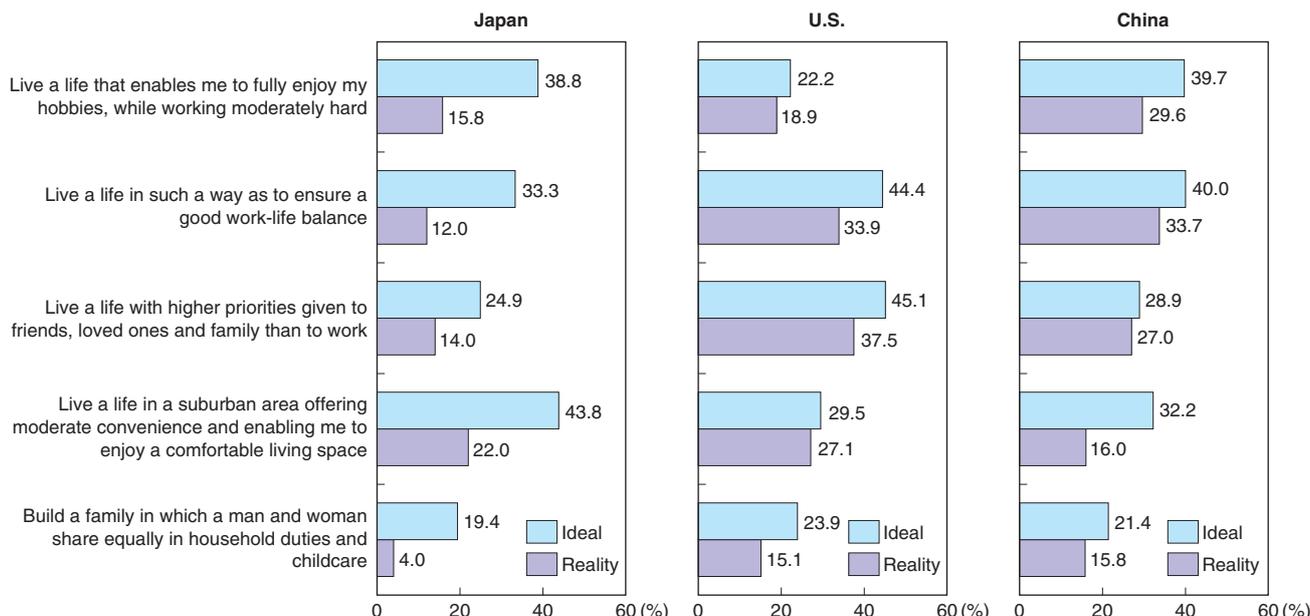
The term “Super DEWKs (dually employed with kids)” refers to households where both husband and wife work full time as primary wage earners and have children living there. NRI’s research shows that they are active consumers, particularly in the fields of children’s education, leisure activities enjoyed together with children and products/services to save household labor. It is quite reasonable to assume that the growth in the DEWKs segment where couples earn a good deal of money and spend much to live a comfortable life will also lead to an increase in domestic demand.

Furthermore, in recent years, Japan has experienced a slump in personal consumption due to factors such as that people have become weakly motivated to possess things and that people have become more budget minded in view of recession, growing income inequality, tax increases and the high cost of living. Nevertheless, even under such circumstances, people are very willing to spend money on their hobbies and in their fields of interest as well as for gaining experiences that enrich their lives and improve their interpersonal relationships. In other words, leisure activities enjoyed by people, men and women of all ages, are highly likely to boost consumption. If a society that enables a better work-life balance and encourages both men and women to fully enjoy leisure time could be created, such society would certainly give a boost to personal consumption.

(3) Realizing the desire for a “comfortable lifestyle” will increase the levels of life satisfaction and happiness and eventually boost the country’s vitality

Enabling Japanese people to achieve and maintain a good work-life balance and realizing their earnest aspirations for a “comfortable lifestyle” will certainly lead to an increase in the levels of life satisfaction and happiness and will eventually boost the country’s vitality. As described in Chapter I, among the three countries, Japanese respondents reported the lowest levels of life satisfaction and happiness. In contrast, American respondents reported significantly higher levels of life

Figure 8. Gaps between the ideal way of life and reality (respondents were allowed to select up to three items)



Source: "Online Consumer Survey in Japan, the U.S. and China" conducted by Nomura Research Institute in August 2014

satisfaction and happiness than their counterparts in the other two countries, showing the lowest correlation between self-assessed living standards and levels of happiness. This survey result suggests that Americans feel satisfied and happy with something other than that associated with their economic situation.

Higher levels of life satisfaction and happiness could be attributed to small "gaps" between the ideal way of life and reality. To the question about "your ideal way of life," a larger proportion of respondents in all three countries selected: (1) live in suburban areas offering convenient and comfortable living environments, (2) live in such a way so as to ensure a good work-life balance and (3) live a life that enables me to fully enjoy my hobbies. While these ideals are common among all three countries, the "gaps" between the ideal and reality are the largest in Japan and smaller in the U.S. Although Japanese people aspire to live a life with focus on a healthy work-life balance or on hobbies as strongly as their counterparts in the other countries do, the proportion of actually satisfied desires is small. Such reality is likely to constitute differences in the levels of life satisfaction and happiness.

Even if one spends somewhat more time commuting, one can enjoy personal life enriched by hobbies in a spacious and comfortable suburban area. If real life gets close to such an ideal life, the levels of happiness that Japanese people perceive would significantly increase.

A society could be created in such a way that everyone, not just women, can choose an optimal work-life balance suitable for oneself and one's family without being forced by society and can receive fair rewards for one's labor. Creating such a society would maximize family happiness, increase the number of women who

work with enthusiasm and enjoy shopping, and eventually increase the number of children born and raised happily. It is reasonable to assume that the essence of "women's empowerment" that is truly needed for Japan's future could be found right there in such a society. It would be difficult to achieve such a society by changing the current social structure in a single leap. Nevertheless, by learning from many successful cases achieved across the world, we should steadily move forward toward realizing an ideal women's lifestyle and eventually, an ideal family lifestyle, which are unique to Japan. Efforts toward this goal would include developing a legal system for some aspects that require enforceability and encouraging people to raise or change their awareness of other aspects.

Notes:

Overview of "Online Consumer Survey in Japan, the U.S. and China" conducted by Nomura Research Institute

Major survey items:

- Value orientations, ideal lifestyle
- Employment status, thinking about ways of working
- Basic consumer behavior
- Current status of ICT use, services that respondents want to use in the future
- Basic attributes

Survey method: Online survey

Survey period: August 2014

Survey subjects:

(1) Japan: 3,161 respondents aged 15 - 69

- Gender and age distributions correspond to gender and age compositions of the population based on Japan's population census.
- The entire country was divided into 10 survey areas (Hokkaido, Tohoku, etc.). The sample size was determined according to the ratio of population in each area.

(2) U.S.: 3,115 respondents aged 15 - 69

- Gender and age distributions correspond to gender and age compositions of the population based on the U.S. census.
- Survey areas were determined in conformity with four census regions. The sample size was determined according to the ratio of population by gender and by 10-year age group in each region.

(3) China: 3,134 respondents aged 15 – 59

- In China, because the sample size of the 60 – 69 age group in a survey panel was extremely small, this group was not included in the survey subjects.
- The subject cities and the sample size were determined in consideration of the size of a city and regional balance as follows:

Tier-0 cities: Beijing, Shanghai and Guangzhou (500 respondents in each city)

Tier-1 cities: Dalian and Nanjing (300 respondents in each city)

Tier-2 cities: Harbin, Xian and Chengdu (300 respondents in each city)

- Based on China's statistics, the sample size was determined according to gender and age compositions of the population in each city. (However, when the number of responses received fell short of the required number of responses, responses were collected from those who were close in age in the same city.)

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