



Japan

Though the workplace is changing, employees in Japan still have a traditional workplace mindset.

Japanese culture tends to place importance on working together as a community, so working from home is rare, though many expect to be offered the ability to work from home in the future. Surprisingly, over twice as many as work from home conduct work at external locations (such as a client's office).



Most still use and prefer to use desktops (though the gap between desktops and laptops is much smaller than other developed countries), say they are more productive when working from an office and prefer personal interactions over remote options. In addition, a high proportion of the Japanese workforce say that they wouldn't be happy without the technology they rely on each day.

As Japanese employees conduct more and more business during their personal time, employers can empower them with technologies that can foster that sense of community that is so important to this culture by enabling more communication and collaboration.



One Size Doesn't Fit All



As with global findings, the desktop is the top device for getting work done in the office in Japan, but that may be changing—desktop use has declined in the past two years, while portable options (laptop, smartphone, tablet) are on the rise.

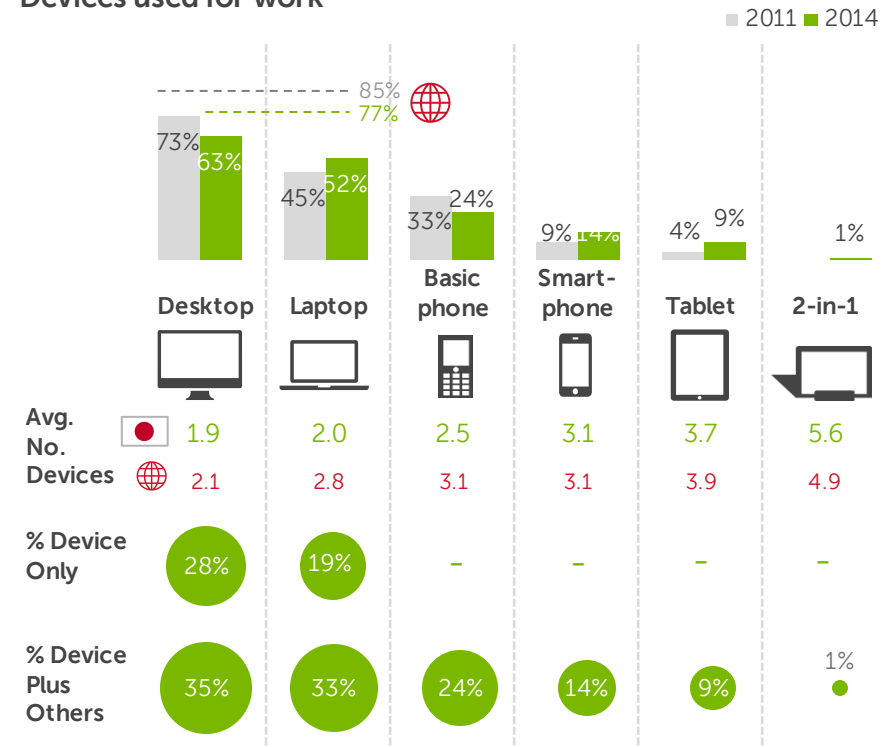
However, the high usage of laptops closes the gap between desktops and laptops that is seen in other parts of the world. In Japan, just under two-thirds of employees use desktops for work, with just over half using laptops (vs. 77% desktops and 40% laptops in the global workforce). Desktops are preferred by about half of employees, while laptops are preferred by about one-third of employees.

Tablets and 2-in-1s use is low, as is touchscreen use when it comes to work.

When it comes to personal purposes, laptops eclipse desktops. Surprisingly, basic mobile phone usage is on par with smartphone usage (this may be driven by the high proportion of those in the manufacturing industry).

Performance is the most important attribute people look for in a work device, followed by software compatibility.

Devices used for work*



Note: nearly half of respondents in Japan are in the manufacturing industry, which may be skewing results.

The Office is King, but it's a Jungle Too



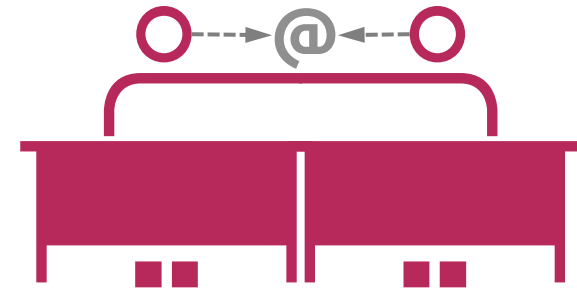
By far, most work is being done in the office of an employer. Almost all employees spend at least some time there, and eight-in-ten spend at least 75% of their time there (compared to just over half globally).

Not only is the office the most common place for getting work done, it's also the most conducive to productivity. 80% of workers say they do their best work there (compared to only 10% who say they do their best work at home).



Japanese employees prefer more personal forms of communication with in-person meetings winning out over online meetings (5-to-1 in Japan vs. 3-to-1 globally) and phone calls are preferred to instant messaging (5-to-1 in Japan vs. 2-to-1 globally).

Only 1-in-10 employees admitting to frequently emailing or IMing with other people located near them, which is significantly lower than in other countries. And despite more direct communication in the workplace, very few Japanese employees indicate that they are frequently interrupted while working in the office.



36%
are **frequently interrupted**
while working at desk
45% Emerging
50% Developed

13%
use **email or IM** to communicate
with other **people located nearby**
67% Emerging
37% Developed

Work Life + Personal Life = Life



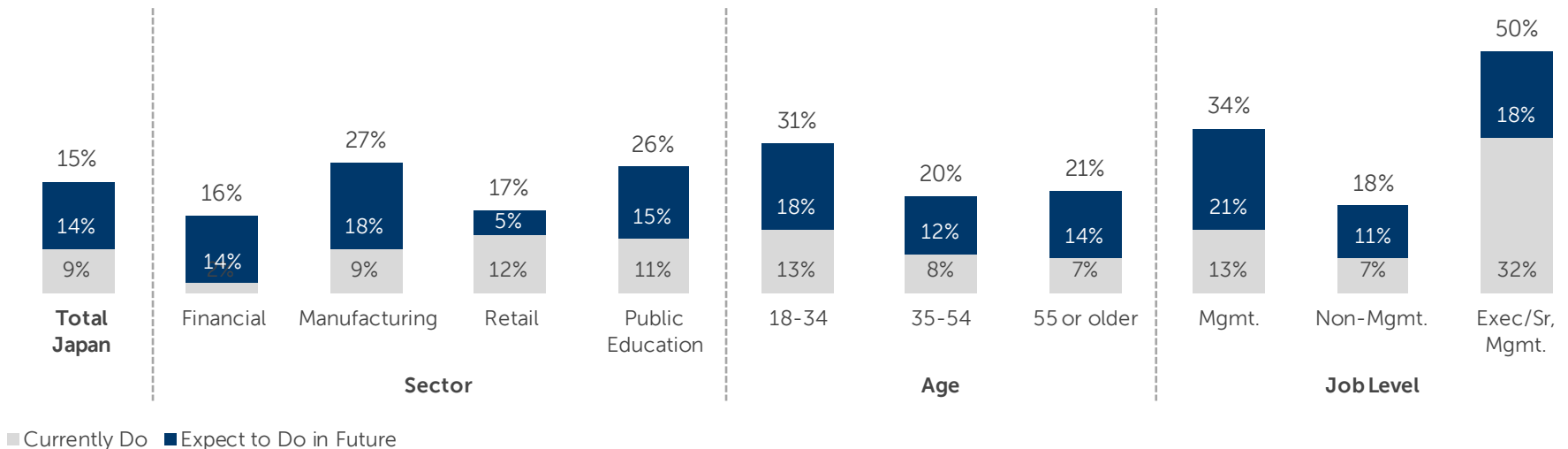
Less than two-in-ten Japanese employees say they spend some of their working hours from home (vs. five-in-ten globally). Culturally, Japanese prefer to work together as a community, so working from home is uncommon.

Only 14% of employees, regardless of age, expect to take their work technology home to work remotely in the future. This result jumps to 18% for people in manufacturing and those aged 18-34 and 21% for people in management roles.

Employees still end up taking work home as many take calls (25% Japan vs. 52% globally) or check email (35% Japan vs. 62% globally) after hours.

One-fourth of employers have BYOD policies available to their employees to allow the use of personal devices for work (vs. over one-half globally). However, some employees secretly use personal devices anyway: 30% of workers use personal devices for work without their employers' knowledge (vs. 43% globally).

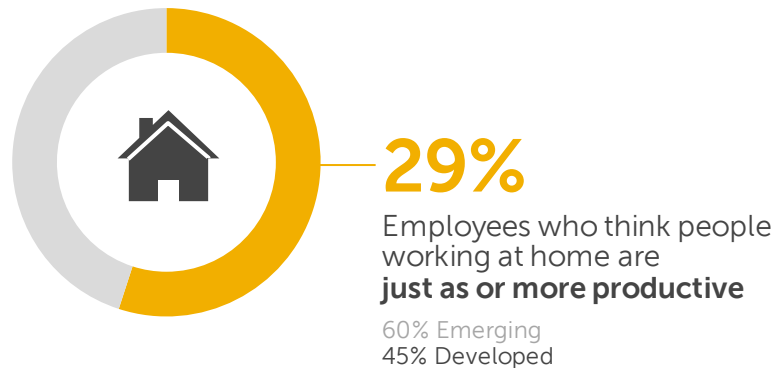
Employees who take their work technology home to work



The Productivity Debate: Office Workers vs. Remote Workers



Overall, about one-fourth of Japanese employees think that those working from home are just as productive or more than those in the office (this percentage is lower than in other developed countries). Just over one-third are undecided on this subject.



Today's Japanese workforce believe there will always be a role for the central office, whereby 77% believe the central office will continue to exist at least in their lifetime (vs. 69% globally).

For most employees, working from home is more of a benefit than an expectation. However, just over one-third of Japanese employees say they expect all employers to offer the ability to work from home in the future—a much higher percentage than in other developed countries.

Expect all employers to offer the ability to work from home

Japan

35%

Emerging Countries

32%

Developing Countries

24%



The Secret to Happy Employees? Technology



Only one-third of the Japanese workforce consider it important to have the newest technology (vs. nearly two-thirds of the global workforce and just under half of other developed countries).

Nearly half say that technology in the past year has had a influence on the way they work and that they wouldn't be happy without the technology they rely on each day.

Very few people would leave their job if the technology is old (6%), and few (11%) say that the quality of the available technology would have at least some influence on their decision to accept a new position.

Importance of latest and greatest technology



Latest technology Influence new position



Likely to quit without latest technology



- Japan
- Emerging
- Developed



53%

wouldn't be happy
without the technology
they rely on each day

The Future of Tech in the Workplace is Bright, but Not Fully Automated



Attitudes of Japanese employees are varied compared to other developed and emerging markets. Few people (8%) believe technology brings people together, while 18% feel it separates people. These polarizing sentiments are more pronounced in other parts of the world.

Technology is linked to happiness for employees in Japan with 53% indicating they wouldn't be happy without the technology they currently have, but also express the opinion that technology is advancing more quickly than we can keep up with it.

Two-thirds believe that technology will hit a limit on the ability to improve productivity (although not any time soon). And advancements in technology won't replace the need for humans in the workplace—only one-fifth think their jobs will be fully automated in their lifetimes. And over half of Japanese employees think that offices will become completely paperless in their lifetime, slightly higher than other developed countries.

Believe there will be no more printing during their lifetime—offices will become completely paperless

Japan

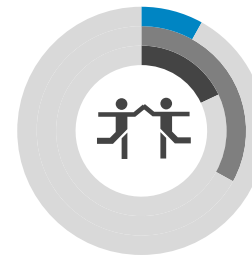
55%

Emerging

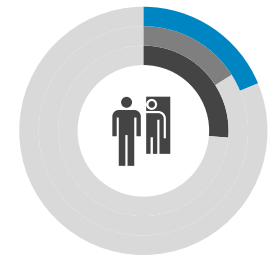
57%

Developed

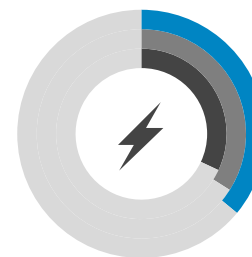
Technology brings people together



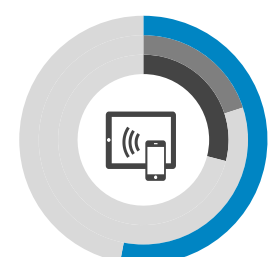
Technology separates people



Technology is advancing faster than we can keep up with it



Wouldn't be happy without the technology I have today



■ Japan
■ Emerging
■ Developed