

April 9, 2015
Recruit Holdings Co.,Ltd.

Recruit Works Institute Has Released the Results of "Survey on Managers in Five Countries"— Showing Precise Pictures of Actual Workplace Climates, Managers' Attitudes, and Images of Ideal Managers in China, Thailand, India, the U.S., and Japan

Tokyo, Japan - April 9, 2015 - Recruit Holdings announced today that the Recruit Works Institute, a research institute supported by people and organizations belonging to Recruit Holdings Co., Ltd. (Headquarters: Chiyoda-ku, Tokyo; President and Representative Director, CEO: Masumi Minegishi), has conducted the "Survey on Managers in Five Countries" covering managers and their management styles in China, Thailand, India, the U.S., and Japan as a global study project. This document summarizes our report entitled "Real Managers: An International Comparative Study on Managers."

The complete version of the report can be downloaded from the website of Recruit Works Institute shown below.
URL:http://www.works-i.com/pdf/150409_5mgr_survey_eng.pdf

Survey Topics

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- The number of immediate section members: A manager belonging to an administrative department of a company with 2,000 or more employees has only 5.0 section members in Japan and the U.S., while it is as many as 30.0 members in Thailand and 60.0 members in India.
- Employees' job separation rate: Looking at the average job separation rate, India is the highest (31.0%), followed by Thailand (20.3%). Japan is low at 5.2%.
- Time allocation of managers' roles: Major roles are organizational management in India and Thailand, employee management in the U.S., and "player" duties in Japan and China.
- Working hours: About 30% of managers work 10 hours or more a day in Japan and the U.S., while employees also work long hours in Japan.
- Age of promotion: Age of promotion to manager is 28.3 years in China and 38.6 years in Japan. In Japan, age of promotion to general manager is 44.0 years old, indicating that the age difference between manager and general manager is the largest (5.4 years old).
- Image of ideal manager: Attractive personality in China, making employees feel confident in the U.S., and taking the initiative and leading by example in Japan

Statistical Topics

◎ One of a few international comparative studies that comprehensively examines the careers and management responsibilities of about 1,700 managers in five countries

Although individual countries have seen intensifying competition among companies for competent managers due to globalization, there have been few studies comparing managers and their management styles in the respective countries. This study shows clear differences among managers and their management styles through comparisons among five countries: China, Thailand, India, the U.S., and Japan.

◎ Structurally analyzes managers' behaviors and attitudes based on quantitative information including working hours and age of promotion, and qualitative information including the image of the ideal manager

We collected quantitative information on managers including the number of section members, employees' job separation rate, annual incomes, and age of promotion. We also analyzed qualitative information on actual workplace climate, management style, preferences among work styles, concerns in the workplace, and images of ideal managers. This study clearly shows the backgrounds to differences in behaviors and attitudes among managers in the different countries.

Survey Summary

Objective of survey: To identify the actual status of managers and their management styles of companies located in five countries: China, Thailand, India, the U.S., and Japan

Subjects: Employees in a position equivalent to general manager (including plant managers and branch managers), managers of administrative departments (HR, general affairs, and others), managers of sales/marketing departments, who have worked for one year or more at a company with 100 employees

However, plant managers and branch managers were excluded from the reports in view of consistency of organizational scales and job descriptions.

Survey items: Actual status of organization, job, work style, career, attitudes, issues, and ideal image

Survey method: Internet research

Survey period: Overseas October 3-20, 2014 Japan September 24-29, 2014

Number of respondents: 1,666 persons (China: 318 persons, Thailand: 302 persons, India: 302 persons, the U.S.: 315 persons, Japan: 429 persons)

Number of valid respondents: 1,553 persons (China: 308 persons, Thailand: 271 persons, India: 250 persons, the U.S.: 295 persons, Japan: 429 persons)

[Inquiries]

<http://www.recruit-rgf.com/support/>

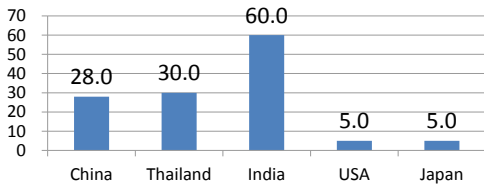
Survey Results

Number of immediate section members and job separation rate: In Japan, the number of section members is small and job separation rate is low, while in India, the number of section members is high and job separation rate is high

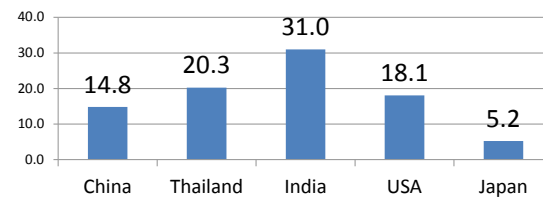
A manager belonging to an administrative department of a company with 2,000 or more employees has 5.0 immediate section members (permanent employees) in Japan and the U.S., while it is as many as 30.0 members in Thailand and 60.0 members in India. India has the highest average employees' job separation rate (31.0%).

- Number of section members (permanent employees)
- Employees' job separation rate

Permanent employees (persons, median)



Job separation rate (% annual)



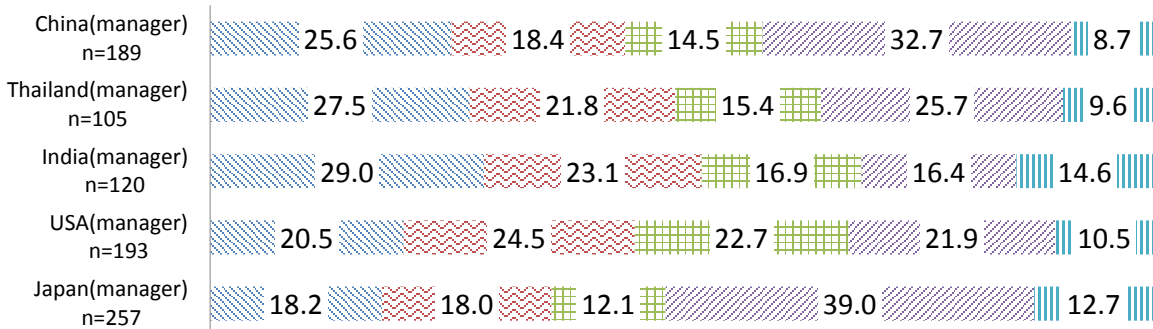
Note: Samples are limited by managers who work at administration department and the firm size is more than 2000 people.

Time allocation of managers' roles: "Player" duties are high in Japan, while employee management is high in U.S.

Managers in India and Thailand spend 29.0% and 27.5% of the total time on organizational management, respectively, because the scale of the organization managed is large. U.S. managers spend a relatively large amount of time on employee management, while managers in Japan and China do so for their "player" duties.

- Managers' roles (%)

Legend: Organizational management (blue), Employee management (orange), Information correspondence (green), "Player" duties (purple), Other work duties (light blue)



Note: Organizational management: Administration of work assignment and progress, budget control, and formulation of organizational strategy.
 Employee management: Training, evaluation, and maintaining motivation
 Information correspondence: Passing on important managerial information to workers on the ground, and conveying the necessary on-the-ground information to top management, in addition to sharing information among team members
 "Player" duties: Execution of work duties to fulfill personal performance targets
 Other work duties: Miscellaneous work such as filling out forms and duties related to maintaining the organization such as legal compliance

Working hours: Both managers and members work long hours in Japan

A high percentage of managers work 10 hours or more a day in Japan (36.9%) and the U.S. (35.9%). Moreover, 28.5% of employees work 10 hours or more a day in Japan. In China, people work five days a week and do little overtime work.

- Working hours a day (managers and employees)

Legend: less than 7 hours (blue), less than 8 hours (orange), less than 9 hours (green), less than 10 hours (purple), over 10 hours (light blue), ● avg. hours per week, ○ avg. days per week



Age of promotion: Promotion is slow and age difference between manager and general manager is large in Japan

The average age when an employee is promoted to manager is 28.3 years old in China and 29.2 in India. In both countries, the average age when promoted to general manager is 29.8. The average age when promoted to manager and general manager is 30.9 and 32.0 in Thailand and 34.6 and 37.2 in the U.S., respectively. In Japan, the former is 38.6 and the latter is 44.0, indicating promotion procedures take more time. The age difference between manager and general manager is the largest (5.4 years old).

□ Age of promotion

	Average age when promoted to		Difference b-a
	a. manager	b. general manager	
China	28.3	29.8	1.5
Thailand	30.9	32.0	1.1
India	29.2	29.8	0.6
USA	34.6	37.2	2.6
Japan	38.6	44.0	5.4

Image of ideal manager: Attractive personality in China, making employees feel confident in the U.S., and taking the initiative and leading by example in Japan

The image of a well-regarded manager is a great person with an attractive personality in China, and a person who understands employees in India. The quality sought for a manager is being well-respected by employees and setting an example in Thailand, motivating employees and helping them feel confident in the U.S., and taking a leading role and fulfilling responsibilities in Japan. From another standpoint, these ideal images show that the reality is just the opposite and these are issues to be addressed.

□ Ideal image of manager (free comment)



China

- Personally appealing, good character, wide perspective
- Open and unconcerned about particulars
- Boldly Innovative



India

- Understands employees
- Resolves problems
- Contributes to company growth



Japan

- Leads by example, teaches with one's back
- Can work without manager present
- Nurtures employees



Thailand

- An example for employees, well-respected
- Endearing to employees
- Gives freedom to employees



U.S.

- Helps employees feel confident
- Fair and honest
- Creates a competent and trustworthy team

Thoughts of Koichi Kume, Chief Researcher and Global Survey Project Manager

We often hear the view from Japanese companies that have entered an overseas market: "It is difficult to secure competent local staff." In order to seek an answer to the question: "Is the management of Japanese companies really incompetent?", we conducted the "Survey on Managers in Five Countries" to make a comparative analysis of the management style of Japanese companies and overseas companies.

This international comparative study highlights the characteristics of management styles in each country, helping us identify reasonable differences between the countries. In particular, the study demonstrates the uniqueness of the Japanese management style, which centers on consensus building on the condition that roles and duties remain ambiguous, and both seniors and juniors work long hours. At the same time, the study reaffirms that member- and relationship-oriented management style in Japanese companies is a strength that cannot be seen in overseas companies.

Competition among companies is intensifying around the world. We hope the international comparative study presented in this report will serve as an impetus to identify the prerequisites and strengths of the management styles of the respective countries and lead to their development.



Infographic Videos Also Available

Together with the report, Recruit Holdings has uploaded a video describing the content of the Five Nation Manager Survey on YouTube.

The video is a one-minute summary for those who wish to view the content but feel it is difficult to get into because the results are complex or who are busy and only interested in the main points. Please take the time to have a look.

URL: <http://youtu.be/dPc9TtUjhIs>



About Recruit Holdings

Founded in 1960, Recruit Holdings is a leading information services and human resources company in Japan. Through a wide range of services, Recruit is focused on variety of areas, including employment, education, housing, marriage, travel, restaurants, beauty, cars, hobbies, and lifestyles. Recruit has more than 30,000 employees and operates in Asia and North America. Its holdings include Indeed, the world's largest job site. For more information visit <http://www.recruit-rgf.com/>