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What is Happening to Unionization in Japan?

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Abstract

Official government estimates show a gradual decline in union density in Japan over several decades akin to that in other countries with decentralized bargaining structures. However, new evidence from various social surveys indicates that union density has been rising in Japan. Using one of these social surveys – the Survey on the Work and Life of Workers (SWLW) – we show union density has risen by 7.3 percentage points to 29.1% in the Japanese private sector between 2011/13 and 2020/24. We decompose the growth in union density since 2011/13 to establish how much of it is attributable to changes in workforce composition. Conditioning on union presence at the workplace, compositional change accounts for 47% of the increase in union density. The remaining 53% is due to within-group change with unions increasing membership across all types of worker including some with traditionally low rates of unionization. However, establishing a union at the workplace remains key since virtually all the growth in union membership (97%) is in unionized workplaces.

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Key words: union membership, union density, union presence, Japan, decomposition

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1. Introduction

Trade union density – the percentage of employees who are members of a trade union – has been in decline across the globe in the last four decades (Figure 1). Ackers (2015) identified six common causes of declining unionization: the shift from an industrial to a post-industrial society increasing the incidence of hard-to-organize service and knowledge jobs; growing competition from non-union labor due to globalization; changes in worker tastes associated with a shift from class-based to consumer-based identities; neoliberalism's erosion of union values; growing difficulties unions face in organizing a 'precariat' without formal employment contracts and a fixed workplace; and strategic missteps by unions themselves.

It is also apparent from Figure 1 that there is substantial cross-country variance in both union density levels and trends. Declines in union density are most apparent in countries characterized by decentralized collective bargaining occurring either at workplace or firm level (OECD, 2019). There are, arguably, two broad reasons as to why union density has declined most precipitately in countries with decentralized collective bargaining. One is that their bargaining structures reflect a weakness in terms of their political power base and 'reach': in a sense their bargaining arrangements are a function of their weakness and would be different if they had greater resource-based power. The absence of these power resources can leave unions in these regimes exposed when political or economic conditions militate against unionization. A second reason is that unions face greater costs of organizing and servicing members where they are reliant on waging continual organizing campaigns to maintain and increase their union membership base (Willman et al. 2020).

Most of the countries with decentralized bargaining structures are English-speaking. They have traditionally had lower union membership rates than other countries, such as those in Northern Continental Europe and Scandinavia, where trade unions often bargain at sectoral or national level, and are hard-wired into social welfare structures such as pension and unemployment insurance systems (OECD, 2019).

Japan is an exception (as is South Korea) in the sense that it was never part of the British empire, and so is not English-speaking, and yet it too is characterized by decentralized collective bargaining arrangements, with collective bargaining usually occurring – if it occurs at all – at firm level, and where there is a near one-to-one relationship between

being a union member and having one's pay set via collective bargaining (Rebick, 2005) This system, whose origins can be traced to the period of United States occupation of Japan in the early post-war period, is described in more detail in Section Two.

It might come as no surprise, then, if union density had declined in Japan in the last few decades, much as it has done in the United States and the United Kingdom, which are also characterized by decentralized collective bargaining structures. This is what we see in Figure 1. To populate this figure with data from Japan the OECD relies upon the Ministry of Health, Labour, and Welfare's (MHLW) annual Basic Survey on Labor Unions (BSLU). The BSLU indicates union density peaked at 55.8% in 1949 but has declined gradually ever since such that, by 2024, it had reached a record low of 16.1%. Since the BSLU is conducted by government agencies and covers all labor unions across the country, its results are considered completely reliable. Hence, debates about the labor-management relations take as given the veracity of the trends as presented in the BSLU. Commentators analyzing the data suggest that the decline in unionization rates has been caused by the shift to service industries, the growing number of non-regular workers such as part-time and fixed-term employees, and a decrease in the formation of new unions (Tsuru and Rebitzer, 1995; Yamashita, 2005).

However, as indicated in Figure 2 (Nakamura et. al., 2024) union membership rates calculated from social surveys show completely different trends from the BSLU over the last two decades.

According to the Japanese General Social Surveys (JGSS) union density stood at 18.4% in 2002 but has subsequently risen by 6.5 percentage points to 24.9% in 2024 (authors' own calculations). Similarly, the union density rate calculated from the *Survey on the Work and Life of Workers* (SWLW), conducted by Rengo-RIALS (the research institute of Japanese Trade Union Confederation) was 19.7% in 2011 but rose to 29.6% in 2024, increasing approximately 10 percentage points. As a result, the gap between the BSLU unionization rates and the JGSS and SWLW union membership rates has been widening year by year such that, at present, the density rate estimated by social surveys is nearly double the official estimates.[1]

[1] A qualitative investigation of the reasons for the discrepancies between the official estimates and those from social surveys is presented in Nakamura et al. (forthcoming).

In this paper we examine trends in union density in the SWLW to establish how much of the increase in density since 2011-13 is accounted for by compositional change in the workforce, and how much is due to within-group change. Within-group change, often referred to as the propensity for unionization, or the 'taste' for unionization, captures the change that cannot be accounted for by changes in the demographics of the workforce, the jobs they undertake and the nature of employers.

In doing so, we follow earlier studies for the United Kingdom and the United States that have deployed the shift-share methodology described in Section 3.2 to estimate the contribution of compositional changes in the workforce to declining union density in the closing decades of the 20th Century. For Britain, there is considerable disagreement about the extent to which compositional change contributed to union decline. Some commentators find its effect to be relatively large: Booth (1989) attributes 42 per cent of the density decline from 1979 to 1987 to compositional change, while Green (1992) found compositional change accounted for just under one-third of the density decline between 1983 and 1989. Others show relatively little impact from compositional change for the first half of the 1980s (Carruth and Disney, 1988; Freeman and Pelletier, 1990). Bryson and Gomez (2002) reconcile some of these disparate results by examining union decline over the whole period between 1983 and 2001. They show that compositional change accounted for much more of the decline in union density in the 1990s than it did in the 1980s. Over the whole period 1983-2001, compositional change accounted for 6 of the 16-percentage point decline in union density in Britain.

Using the Survey on the Work and Life of Workers (SWLW) we show union density has risen by 7.3 percentage points to 29.1% in the Japanese private sector between 2011/13 and 2020/24. We decompose the growth in union density since 2011/13 to establish how much of it is attributable to changes in workforce composition. Conditioning on union presence at the workplace, compositional change accounts for 47% of the increase in union density. Thus, in contrast to the studies referred to above, compositional change in the workforce has worked in favor of growth in union membership. The remaining 53% is due to within-group change with unions increasing membership across all types of worker including some with traditionally low rates of unionization. However, establishing

a union at the workplace remains key since virtually all the growth in union membership (97%) is in unionized workplaces.

We also explore potential contributors to changing union density a little further via two additional avenues. First, following Bryson and Gomez (2005) and Booth et al. (2010), we examine changes in rates of never-membership and ex-membership. We find that, in contrast to the UK and the United States, where never-membership has risen over time, it has declined marginally in Japan, along with the rate of ex-membership. This indicates that the growth in union density is due in part to an increased propensity of new workers to join unions, and to an increase in the duration of union membership. Second, we briefly examine the demand for unionization among workers by examining their attitudes to union joining and the necessity for trade unions to see whether these have changed over time.

The remainder of the paper is structured as follows. Section Two provides more detail on the institutional arrangements for unionization in Japan which motivates the use of shift-share techniques to examine reasons for changes in union density in Japan. Section presents our data and estimation techniques. Section Four presents results, and Section Five concludes.

2. Labor Unions in Japan

Scholars have classified Japan's employment system and labor market as different from those in Europe and North America (Marsden, 1999; Rubery and Grimshaw, 2020). That difference is characterized by 'three sacred treasures': lifetime employment, seniority-based wages, and enterprise unionism (Abegglen, 1958; OECD, 1972). Despite significant changes in the employment system - such as the flattening of wage structures and the increase in fixed-term employment - the traditional enterprise-based unionism remains firmly entrenched in labor-management relations. It means that labor unions are organized at workplace or company-level, while collective bargaining is mostly conducted at the enterprise level. Some industrial unions and community unions exist, but enterprise unions dominate in Japan (Ministry of Health, Labour and Welfare, Basic Survey on Labor Unions, 2024).

Notwithstanding the unique features of the Japanese employment system, its fragmented and uncoordinated collective bargaining shares some similarities with the collective

bargaining arrangements in the United States and the United Kingdom.[2] In all three settings unions must devote resources to organizing employers on a workplace-by-workplace or firm-by-firm basis, something that is costly to trade unions and can result in a 'representation gap' whereby worker demand for union representation exceeds its supply, a phenomenon well-documented in the United States and the United Kingdom (Towers, 2007). The absence of legislative provisions to extend collectively bargained terms and conditions to uncovered workers means that collective bargaining coverage remains relatively low, with coverage not dissimilar to union density rates.[3]

Union organizations differ from their counterparts in the United States and the United Kingdom in that they are firm-specific. Different unions organize different workplaces. Thus, whereas there are 128 trade unions in the UK (Certification Officer, 2024) and 60 in the United States (https://aflcio.org/about-us/our-unions-and-allies/our-affiliated-unions) in Japan there are 22,513 labor unions predominantly formed within the enterprises (Ministry of Health, Labour and Welfare, Basic Survey on Labor Unions, 2024).[4] This makes the job of organizing and servicing union members even more difficult since unions are often unable to call on the resources of national unions. Also, Japanese unions come into being in a rather different way. In the United States, unions must achieve a majority vote under rules set by the National Labor Relations Act to gain union recognition rights. This process is often acrimonious as union organizers face employer hostility (Ferguson, 2008). The system in the United Kingdom is voluntarist, with unions and employers coming to an agreement once a union has demonstrated sufficient support among the workforce for union recognition.[5] Even so, the process of union organizing can be fractious.

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[2] This should not be so surprising since the current system of employment relations, including the organization of trade unions, originates in laws and practices introduced by the United States during its occupation of Japan in the early post-War period (Hamaguchi, 2021).

[3] See Araki (2016), pp. 710-715.

[4] Japan's labor market differs structurally from those of Western countries, as career development tends to be centered around firm-specific trajectories rather than trade, occupation, or industry. Accordingly, the term 'labor union' is more commonly used than 'trade union' in the Japanese context.

[5] There is a statutory procedure for trade unions to obtain recognition through a vote procedure akin to that in the United States, but it is rarely invoked (Wood and Moore, 2004).

The Japanese system is characterized by cooperative labor-management relations such that in over nine-in-ten cases unionized employers adopt a system of "check-off" whereby the employer collects union dues from members via their payroll (Ministry of Health, Labour and Welfare, Survey on the Actual Situation of Labor Union Activities, 2023). Furthermore, there are union shop agreements in two-thirds of unionized enterprises (Ministry of Health, Labour and Welfare, Survey on the Actual Situation of Labor Union Activities, 2023). The union shop system enables unions to secure members without recruitment efforts. However, because workers in these settings become union members almost automatically, their commitment to union activities is often weak (Oh, 2021).[6] Another feature of this system is relative labor quiescence, as indicated by the number of labor disputes which has decreased from 10,462 in 1974 to only 270 in 2022 (Ministry of Health, Labour and Welfare, Labor Dispute Statistics).[7]

Unions in Japan have traditionally been strongest in the primary sector of the economy characterized by the employment of male employees on regular, permanent contracts, often in large firms. Today, two-thirds of union members in the private sector are employed in enterprises with 1,000 or more employees (Ministry of Health, Labour and Welfare, 2024).[8] In recent decades the fastest growing sectors of the Japanese economy have been those where unions are less prevalent. From 1984 to 2024, the proportion of non-regular employees among all workers more than doubled (from 15% to 37%) and the number of female workers increased from 22.8 million to 30.8 million, while the number

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[6] Under these union shop agreements, in principle, all employees who meet certain conditions are required to join the labor union. They differ from pre- and post-entry closed shops common in the 1970s and 1980s in Britain where closed shop agreements prohibited hiring non-union workers and facilitated dismissal of those who quit the union (Daniel and Millward, 1983, Chapter 3; Millward and Stevens, 1986, Chapter 4).

[7] This was not always the case. Indeed, in the early post-War period union militancy characterized employment relations in Japan (Gordon, 1985).

[8] Some have noted that the good terms and conditions union members enjoy are due to their concentration in large firms, rather than the endeavors of labor unions (Suzuki, 2023). Studies indicate union bargaining traditionally results in a union wage premium for workers (Okamoto and Matsuura, 2020; Hara and Kawaguchi, 2008), although there are no estimates relating to the last decade. The most recent evidence for Japan (which covers the period through to the early 2000s) also finds unions have a positive effect on firms' productivity (Morikawa, 2010).

of male workers rose from 34.9 million to 37.0 million (Statistics Bureau, Ministry of Internal Affairs and Communications, Labour Force Survey). Today, men make up two-thirds (64%) of regular employees, while women make up two-thirds (68%) of non-regular employees (Statistics Bureau, Ministry of Internal Affairs and Communications, Labour Force Survey, 2024).

These trends, also apparent in other developed economies, have contributed to declining union density, as noted in the introduction, emphasizing the importance of union organizers making inroads into non-traditional workplaces and those on non-standard contracts of employment. And yet, unions in Japan have been slow to engage with the needs of non-regular employees. Some have chosen not to organize non-regular employees (Yamashita, 2005). Indeed, nearly 60% of unions that have non-regular employees in their workplaces do not allow them to become union members (Ministry of Health, Labour and Welfare, Survey on the Actual Situation of Labor Union Activities, 2023).

This stance has attracted criticism from observers (Kambayashi and Kato, 2009; Shimizutani and Yokoyama, 2009). However, the slow progress in unionizing non-regular employees is not solely due to union reluctance. It also stems from a combination of factors, including non-regular employees' unwillingness to bear the costs and devote time to union activities, as well as employers' refusal to include non-regular employees in union shop agreements preferring, instead, to use non-regular workers for flexible workforce adjustments (Nakamura, 2024). There are signs of change: in workplaces where non-regular employees are the majority, such as in the retail sector, unionization has progressed. Consequently, the unionization rate of part-time workers in the economy has been steadily increasing, reaching 8.8% in 2024 (Ministry of Health, Labour and Welfare, Basic Survey on Labor Unions, 2024). A priori, it is therefore unclear just what role changes in workforce composition may have played in trends in union density in Japan.

3. Survey Data and Methodology

3.1. Data

Our empirical analyses exploit the *Surveys on Work and Life of Workers* (SWLW). SWLW is a survey of private sector workers conducted by Rengo-RIALS, the research institute of Japanese Trade Union Confederation, every April and October since 2001. There are

currently 48 sweeps. SWLW captures workers' perceptions of economic conditions, work and life in general. Rengo-RIALS commissions a research firm to conduct this survey. It adopts a quota sampling method defined by sex, age group, and employment status based on the Employment Status Survey, a household survey conducted by MHLW.

Some modifications have been made to the survey over the years with respect to respondents' age range, residential areas, and survey method. The age range started at 20-59 and expanded to 20-64 in October 2005. It originally covered two major areas, the Tokyo metropolitan area and the Kansai region, but expanded to all prefectures in April 2018. Along with this change, the sample size gradually increased from 800 to 2,000 and then to 4,000. Furthermore, the survey method changed from postal mail to online survey in April 2011.

We confine our analyses to the period from 2011 and for the Tokyo and Kansai regions only to maintain consistency in survey design and the population from which the survey is drawn. We note the sensitivity of our results to the inclusion of other regions of Japan from 2018.

In high-income countries, the unionization rate in the public sector tends to be higher than in the private sector. In Japan, according to the 2024 BSLU, while the estimated overall unionization rate is 16.0%, the unionization rate in the public sector is 29.0%. Consequently, union density in the SWLW would be greater if it included the public sector.

Unionization measures: SWLW consistently includes two questions about unionization rates. The first question focuses on union membership. The question was revised in April 2003, after then asking: "Are you currently a member of a labor union?" The response options are: "I am a member of a labor union at my workplace," "I am a member of a labor union outside of my workplace," "I am not currently a member, but I was in the past," "I have never been a member," or "No answer."

The "No answer" option was removed from the questionnaire following the transition to an online survey in 2011. We regard the responses "I am a member of a labor union at my workplace/outside of my workplace" as indicating union membership. The unionization rates of SWLW are calculated by dividing the number of union members by the number of respondents who were working.

The unionization rates estimated from the SWLW declined in the early 2000s, albeit from

a rate that was considerably higher than that estimated from the BSLU and JGSS. The switch in survey mode led to lower estimates of unionization from 2011, as is apparent from the break in the time-series. However, since then unionization has risen from 18.8% to 29.6% in 2024 (Appendix Table A1) – almost twice the rate estimated in the BSLU. As noted above, the SWLW sampling frame changed, extending the survey beyond the Tokyo and Kansai areas. We restrict our analyses to survey respondents in these two metropolitan areas which results in a slightly higher estimate of unionization rates by 2024 (30.2% instead of 29.6%).

The second question asks about the existence of a labor union at the respondent's workplace: “Is there a labor union at your workplace?” Respondents can choose one of the following options: “There is a labor union,” “There is no labor union,” “I do not know whether there is a labor union,” or “No answer.” The question is important for our analyses because it captures union supply of the union good. We condition on union presence because it helps to distinguish between changes in union density associated with changes in the supply of the union good, on the one hand, and the “taste” for membership on the other. “Tastes” can only be satisfied if there is a union present that a worker is able to join, otherwise non-membership may reflect frustrated demand for unionization.

Figure 3 indicates that the percentage of private sector employees answering "No (no union at the workplace)" has been declining since around 2006, while the proportion saying “Yes, union at the workplace” fell early on, but has since recovered to where it was at the outset. The proportion of those answering "Don't know" has been increasing: it rose from 15.3% in 2011 to 21.5% in 2024. This is consistent with increased uncertainty among employees as to the role that trade unions play in Japan (Kumazawa, 2013; Nakamura et al, forthcoming) which, in turn, appears to have led to a lowering of workers' expectations regarding the value of trade unions (Umezaki, 2024).

We also examine two further variables relating to unionization to improve our understanding of reasons for changing unionization rates. First, union non-members were asked about their intentions to join a trade union, thus offering insights into the potential demand for union membership among non-members. Second, all workers were asked “Do you think labor unions are necessary?”, helping us to understand how relevant and important Japanese workers thought trade unions are.

Control variables: we use ten additional variables in the data set to categorize workers.

Three (age, sex and qualifications) are demographic variables; four (contract type, occupation, industry and annual wage) capture key aspects of the job the worker performs; two (firm size and industry) relate to the nature of the employer; and the final variable (region) identifies the location of the worker.

3.2. Estimation

We use shift-share analysis to decompose the rise in union membership between 2011-13 and 2020-24. Following Green (1992) and Bryson and Gomez (2002), the change in union density between the early years in our series (2011-2013) and the later years (2020-2024) can be written as:

$$\Delta M = \sum_g m_g^{2024} p_g^{2024} - \sum_g m_g^{1113} p_g^{1113} \quad \text{(Eq.1)}$$

where m_g is union density within group g, p_g is the proportion of all employees in group g, superscripts delineate the grouped years, and the sum is over all groups. The groups g are stable throughout the period of analysis.

Shift-share analysis splits the change in density into three components so Equation 1 may be rewritten as:

$$\Delta M = \sum(m_g^{2024} - m_g^{1113})p_g^{1113} + \sum(p_g^{2024} - p_g^{1113})m_g^{1113} + \sum(m_g^{2024} - m_g^{1113})(p_g^{2024} - p_g^{1113}) \quad \text{(Eq.2)}$$

The first term on the right-hand side of the expression is the change in membership density that would have occurred if the employee composition had stayed the same in 2020-2024 as in 2011-2013 but within-group densities had changed. The second term is the change that would have occurred due to change in employee composition if within-group density had stayed at its 2011-2013 level. The third term is the interaction of the above two effects and is generally small by comparison.

We then run linear probability models which are a multivariate extension of the shift-share technique for assessing changing determinants of membership. Let

$$Y_{it} = \beta^t X_{it} + \varepsilon_{it} \text{ (Eq. 3)}$$

where Y_{it} is a 0/1 dummy variable denoting whether individual i at sample period t is a union member, X_{it} is a vector of variables representing the groups or workforce dimensions mentioned in Section 3.1, β^t is a vector of coefficients for sample period t and ε_{it} is an error term. The estimated predictions $\widehat{\beta^t} X_{it}$ are interpreted as the

probabilities that individual *i* at sample period *t* is a union member.

A drawback to the technique is that the value of $\widehat{\beta^t} X_{it}$ may be outside the range 0–1, so that it cannot be interpreted as a predicted probability.[9] Following Green (1992) and Bryson and Gomez (2002) we chose to use the linear probability model because it is the closest multivariate analogue to the shift-share analysis.

There are two sets of estimates to identify the separate contributions of workforce compositional change and within-group change as described in Table 4 and Appendix Table A2. The first set of analyses model membership for each group of years, generating a mean predicted rate of membership based on employees' characteristics for that group of years. These "unrestricted predictions" are not shown in the tables because these predicted means are identical to the observed means we show in the first column of the tables. The second set of analyses (the "restricted predictions") are run for a base group of years (2011-2013): these estimates are used to predict rates of membership in later years, effectively holding within-group changes constant. In essence, the model coefficients for the 2011-2013 period are applied to the characteristics of the workforce in later years. The difference between predicted membership rates under the unrestricted models versus the restricted models indicates the contribution of compositional change to changing union density. The contribution of within-group change to membership change is simply the difference between the actual membership rate for a year, relative to the baseline period, minus the amount of the change arising from employment shares.

4. Results

Table 1 shows the share of workers in SWLW – all of whom are private sector workers - at the beginning of the period (2011-2013) and again at the end of the period (2022-2024), together with the unionization rates for each type of worker in both periods. It presents information across gender, age, qualifications, contract type, annual wage, occupation, firm size, industry, regional location, and union presence. In each case we distinguish between worker types (male or female, for example, or low, middle and high paid). In total we distinguish between 26 categories of worker type.

[9] In fact, the linear probability model gives results close to the logit model which transforms the probability to avoid this problem. We ran all our models as logits, confirming that results were indeed very similar.

Across all workers in SWLW the unionization rate rose from 21.8% in 2011-2013 to 29.1% in 2022-2024, an increase of 7.3 percentage points – a rise of one-third (33.5%) in the base rate in the first period. What is striking from the last two columns of Table 1 is that the unionization rate rises for each type of worker between the two periods, suggesting that within-group change is likely a strong contributor to the growth in unionization.[10] However, the growth rate is much stronger among some types of workers than others. For instance, the unionization rate grew by 59% among women over the period, compared to 24% among men; and it rose much more quickly among those on non-regular employment contracts, compared to those on regular contracts.[11]

The workers with by far the highest union membership rate are those in unionized workplaces. In 2011-13 almost two-thirds (63.5%) were union members, but this rose to 72.1% in 2020-24, a rise of 8.5 percentage points (a 13.5% increase).[12]

The other factor that determines change in the unionization rate over time is compositional change in the workforce. If sections of the workforce that tend to have higher unionization rates increase (reduce) their share of employment, this will drive up (down) unionization rates. For example, the reduction in the share of the workforce who are male (down 5.4%) and the increase in the share female (up 7.4%) would lead to a reduction in unionization rates, other things equal, since men have traditionally had higher union membership rates.

Given the very high union membership rate in unionized workplaces, an increase in the percentage of workers reporting the presence of a union would have a very large impact on overall union membership rates. Although we see 20% decline in the percentage of

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[10] Union membership is higher among the young (aged under-30) than it is among older people. Further investigation reveals that union membership rates rise to age 25, then stabilize until workers reach their late 30s, after which they decline slowly, then more rapidly from age 60. This hump-shape in union membership by age is a common finding in the literature (Blanchflower and Bryson, 2022).

[11] Our definition of regular and non-regular employees follows the one used in the Labor Force Survey noted on page 7 and relies on employees' self-designation of their status. Regular employees include directors. Non-regular employees include part-time casual workers; contract employees; dispatched employees; and others on non-regular contracts.

[12] Although membership more than doubled in non-unionized workplaces, it rose from only 0.9% to 2.3%.

workers reporting no union at their workplace, the rise in the percentage reporting a union present is not so large (15.9%). That is because some of the change is due to a rise in the percentage of workers saying they did not know whether there was a union at their workplace or not – from 16.6% in 2011-13 to 21.1% in 2020-24, a rise of 27%.[13] There is therefore some uncertainty regarding the precise contribution of new union organizing to rising union membership rates.

Table 2 presents the univariate decomposition of the change in union membership rates in the SWLW between 2011-13 and 2022-2024 using the methodology described in Section 3.2. The decomposition identifies the contributions of within-group (shifts) and compositional changes (shares) to the change in union membership rates presented in Table 1, and an interaction between the two which we present but is typically very small.

The first three columns of Table 2 present results for the whole private sector where union membership rates grew by 7.3 percentage points. It is apparent that within-group changes dominate, and always raise union membership rates, whereas compositional changes in the workforce tend to be small. Membership growth was apparent in both unionized workplaces and non-unionized workplaces with compositional change in union versus non-unionized workplaces accounting for only 2.8 percentage points of the 7.3 percentage point rise in union membership rates.

Columns 4 to 6 of Table 2 replicate the exercise but focus exclusively on respondents who said there was a union present at their workplace. Among these workers, union membership rose by 8.6 percentage points over the period. Once again, this was largely due to within-group change, with compositional change in the workforce playing very little role.

To provide a better understanding of the role played by compositional and within-group change in union membership trends we turn to multivariate shift-share analysis as

[13] See Table A1 and Figure A1 in the appendix for a full data series. Nakamura et al. (forthcoming) discuss possible explanations for the growth in the percentage of workers saying they did not know whether a union was present at their workplace. BSLU official data indicate that the number of unions in Japan has been falling since the mid-1980s. They indicate that the total number of unions in Japan fell from 62,805 in 2004 to 45,819 in 2024. However, Nakamura et al. identify reasons to suspect that these figures are not accurate and may significantly underestimate both the number of unions in Japan and potential growth in company unions over time.

described in Section 3.2. This analysis entails recovering the changing propensity for union membership over time which we derive from the regression coefficients from union membership linear estimation models for different periods.

Table 3 presents models for four time periods: 2011-13, 2014-16, 2017-19 and 2020-2024. They are identical in terms of model specification. The models account for a sizeable percentage of the variance in union membership, with the adjusted r-squared ranging between 0.54 and 0.59.

In some instances, the coefficients capturing workers' propensities for union membership are relatively stable across time. This is the case, for instance, for being female versus male. Note that women have a slightly higher probability of being a union member, ceteris paribus, despite having much lower union membership rates in the raw data as shown in Table 1.

Others vary a little. For example, the propensity for union membership rises a little for the young relative to the old. Other changes are more marked. For instance, those on regular contracts have a higher probability of being union members throughout, compared to those on non-regular contracts, *ceteris paribus*, but the difference falls by around one-third over the period.

The biggest change relates to the role of union presence at the workplace. In 2011-13, those working in a unionized workplace had an increased probability of being a union member, relative to a 'like' worker in a non-unionized workplace, of around 61%. But the gap in probabilities has grown over time such that, by 2020-2024, they were 68% more likely to be a union member, *ceteris paribus*.

We use the predicted probabilities of union membership generated by these models to decompose the growth in union membership over the period into the change implied by compositional change among workers (their shares in the sample), on the one hand, and changes the propensity for union membership on the other. As discussed in Section 3.2, the multivariate shift-share analysis decomposes the change in the union membership rate between 2011-13 and 2020-2024 into that which is attributable to compositional change (by holding the within-group propensities constant at their 2011-2013 values) and that which is due to within-group changes. (The third term, which is the interaction between the two, is generally small and ignored).

Table 4 summarizes the results from the multivariate shift-share analysis in models that incorporate union presence at the workplace. Almost half (47%) of the 7.3 percentage point rise in union density over the period is accounted for by compositional change, with the remainder (53%) due to within-group change.[14]

If we exclude union presence from the covariates entering the model this substantially reduces the importance of compositional change in accounting for the rise in union density. In these models, compositional change accounts for 29% of the increase in density between 2011-2103 and 2020-2024, with the remaining 71% due to within group change (Appendix Table A2).[15]

Using the survey questions on current, ex- and never-membership we can establish whether the increase in the stock of union members is due to a reduction in those who have never been a union member ("never-members"), a reduction in the outflow rate (indicated by a decline in "ex-members") or both. Although the change in survey mode in 2010/11 resulted in a higher estimate of never-membership, the percentage of employees who are 'never-members' has fallen since 2011-13 (Table 5). Furthermore, ex-membership has also been declining, indicating a reduction in the outflow rate from union membership. These findings suggest a rise in duration of membership for those who are members, and a marginal increase in unions' ability to organize new workers.[16]

Notwithstanding these gains in union membership, frustrated demand for union membership remains high in the Japanese private sector. Asked whether they would join a trade union if asked, around one-quarter of non-members say they would like to join or would join 'if approached'; just over one-quarter say they would not like to join, while just under one-half say they don't know (Table 6). This suggests a substantial frustrated

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[14] Results are relatively insensitive to the number of categories we use for the variables that appear in the model.

[15] If we widen the estimation sample to include respondents outside Tokyo and Kansai who were surveyed from 2018 onwards, the results are similar. Across the whole private sector, compositional change accounted for around two-fifths of the growth in union density between 2011/13 and 2020/24 for this broader sample, with the remaining three-fifths due to within-group change.

[16] These trends are apparent for the whole SWLW sample including those in regions outside Tokyo and Kansai who were first surveyed in 2018 (Appendix Figure A2).

demand for unionization arising from a deficit in the supply of trade unions. However, as the table shows, there is no indication of a change in the desire for membership among non-members.

Both union members and non-members were asked about the 'necessity' of having a union at the workplace. Members are roughly three-times more likely than non-members to see them as 'necessary'. Around three-quarters of members thought unions were either 'necessary' or 'better to have than not', compared to roughly half of non-members (Table 7). Again, these figures suggest a sizeable appetite for unionization among non-members, with around one-third thinking unions are "necessary". But, as in the case of the willingness to join, there is little change over time in workers' perceptions of the value of unionization, either among members or non-members. If anything, non-members appear to be expressing greater uncertainty about the value of unionization.

5. Conclusion

In contrast to other countries with decentralized unionization, union membership has been rising in Japan over the last decade or so. Compositional change in the workforce has contributed to this increase to some extent, but the majority of the change is within-group change, with membership rates rising across all categories of worker. Virtually all of this growth is apparent in workplaces with a union present, so establishing that presence at the workplace is a key challenge for trade unions.

Institutional arrangements in Japan suggest that the costs of union organizing are lower in Japan than they are in other countries which are characterized by decentralized bargaining, such as the United States and the United Kingdom. Despite these lower costs of union organizing there does appear to be a substantial amount of unmet demand for unionization among non-members, although this has remained roughly constant over time.

If Japan's trade unions are to make further in-roads into the non-unionized workforce they may have to help those workers overcome falling job satisfaction in Japan, a country where job satisfaction is already low by international standards (Yoneda, 2023). Perhaps relatedly, Japanese workers are expressing increasing disillusionment with the world of work which is no longer as important in their lives as it once was (Yoneda, 2023).

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Table 1: Changes in Workforce Composition and Changes in Union Membership Rates

	Share (%)		Unionization rate (%)	
	2011-13	2020-24	2011-13	2020-24
Sex:				
Male	57.0	53.9	26.3	32.6
Female	43.0	46.2	15.8	25.1
Age:				
< 30 years	22.0	19.9	27.1	37.8
30, <50 years	50.9	50.7	23.1	30.5
>= 50 years	27.1	29.4	15.1	20.8
Qualifications:				
Graduate/undergraduate	51.8	54.0	26.3	32.6
Two-year college	22.3	21.1	15.2	23.9
High/Junior School	25.9	24.9	18.5	25.9
Contract Type:				
Regular	66.6	66.4	28.9	35.5
Non-regular	33.4	33.6	7.6	16.4
Annual Wage:				
< 3M Yen	43.2	39.8	11.8	19.9
3 M, <= 5 M Yen	29.3	29.6	24.9	39.1
>5 M Yen	27.5	30.6	34.3	40.6
Occupation:				
Manager/Professional	29.6	25.5	24.0	28.8
Other workers	68.7	71.9	21.2	29.6
Don’t Know	1.7	2.6	8.8	19.6
Firm size:				
<300 employees	49.6	42.7	8.5	14.8
300+ employees	41.1	44.4	40.0	45.6
Don’t know	9.4	13.0	12.4	19.5
Industry:				
Non-manufacturing	76.2	78.3	18.1	27.0
Manufacturing	23.8	21.7	33.7	36.9
Region:				
Tokyo	65.1	66.4	21.5	29.1

	Kansai	34.9	33.6	22.4	29.2
Workplace union:					
	Yes	33.4	38.7	63.5	72.1
	No	50.0	40.2	0.9	2.3
	Don’t know	16.6	21.1	0.8	1.3

Note: SWLW 2011-2024, restricted to Tokyo and Kansai. N = 11,820 and unionization rate = 21.8% for 2011-2013 and N=20,000 and unionization rate=29.1% for 2020-2024.

Table 2: Decomposition of Union Membership, 2011-13 to 2020-24 - Whole Private Sector and Unionized Workplaces Only

	Whole Private Sector			Employees in Unionized Workplaces		
	(1)	(2)	(3)	(4)	(5)	(6)
	Compositional	Within-group	Interaction	Compositional	Within-group	Interaction
Sex	-0.3	7.9	0.1	-0.2	10.6	0.4
Age	-0.3	8.0	-0.1	-0.3	11.0	0.0
Qualifications	0.2	7.5	0.0	0.0	10.8	0.0
Contract	-0.1	7.7	0.0	-0.6	11.1	0.3
Wage	0.7	7.0	-0.1	0.0	10.7	0.0
Occupation	-0.2	7.7	0.2	0.5	9.8	0.5
Firm size	1.1	6.5	0.0	-0.3	10.8	0.3
Industry	-0.3	7.8	0.1	-0.3	10.7	0.4
Region	0.0	7.6	0.0	-0.1	10.8	0.0
Union Presence	2.8	4.5	0.4	-	-	-
Total change	7.3 percentage point rise			8.6 percentage point rise		

Note: SWLW 2011-2024, restricted to Tokyo and Kansai. N= 11,820 for 2011-2013 and N=20,000 for 2020-2024.

Table 3: Linear Estimation, Union Membership

	(1) 2011-13	*(2) 2014-16*	*(3) 2017-19*	*(4) 2020-24*
Female	0.02	0.01	0.02	0.02
	(2.63)	(1.67)	(2.94)	(3.69)
Age (ref: < 30 years)				
30, <50 years	-0.04	-0.04	-0.06	-0.06
	(-6.02)	(-5.56)	(-7.78)	(-9.77)
50+ years	-0.10	-0.12	-0.13	-0.13
	(-13.00)	(-14.24)	(-15.13)	(-19.80)
Educational attainment (ref: Graduate/Undergrad)				
Two Year College	0.01	0.02	0.01	0.03
	(1.23)	(3.36)	(1.83)	(5.3)
High/Junior School	0.03	0.04	0.02	0.03
	(4.17)	(5.51)	(2.48)	(6.08)
Region (Ref: Elsewhere)				
Tokyo	-0.01	-0.01	-0.01	-0.01
	(-1.52)	(-2.16)	(-2.23)	(-2.45)
Contract Type (Ref: Non-regular)				
Regular	0.13	0.1	0.08	0.08
	(16.95)	(13.79)	(10.57)	(13.92)
Annual Wage (Ref: <3m yen				
>3m, <5m yen	0.02	0.03	0.02	0.01
	(2.47)	(3.64)	(2.69)	(2.25)
5m+ yen	0.00	0.01	0.01	0.01
	(0.15)	(1.02)	(1.59)	(1.23)
N workers at firm (Ref: <300)				
300+	0.03	0.03	0.01	0.01
	(4.08)	(4.4)	(1.43)	(2.18)
Don't Know	0.01	0.01	0.01	0.01
	(1.3)	(0.69)	(1.53)	(1.05)
Industry (Ref: Non-manufacturing)				
Manufacturing	0.01	-0.01	0.00	0.00
	(1.26)	(-1.78)	(-0.09)	(-0.58)
Occupation (Ref: Other Occupations)				
Professional/Manager	-0.06	-0.07	-0.07	-0.08
	(-9.57)	(-10.08)	(-10.95)	(-15.04)
Don't Know	-0.02	0.02	-0.02	-0.01
	(-0.79)	(1.47)	(-1.01)	(-0.86)
Union Present	0.61	0.64	0.66	0.68
	(90.87)	(97.05)	(99.02)	(130.93)
Don't Know if Union	0.02	0.00	-0.01	-0.02
	(2.74)	(0.57)	(-1.56)	(-3.28)
Constant	-0.04	-0.01	0.03	0.03
	(-3.61)	(-1.17)	(2.83)	(3.80)
Adjusted R-squared	0.54	0.57	0.57	0.59
N	11820	12000	12000	20000

Notes: SWLW 2011-2024, restricted to Tokyo and Kansai. Dependent variable is the union membership and t-statistics in parentheses

Table 4: Contribution of Compositional Change and Within-group Change to the Change in Union Membership Rate, 2011-2013 to 2020-2024 (including union presence)

	(1)	(2)	(3)	(4)	(5)
	Actual union density	Change relative to 2011/13	2011-13 model prediction	Impact of compositional change	Impact of within-group change
2011-2013	21.8	-	21.8	-	-
2014-2016	24.1	+2.3pp	22.5	+0.7pp [30%]	+1.6pp [70%]
2017-2019	25.7	+3.9pp	23.2	+1.4pp [36%]	+2.5pp [64%]
2020-2024	29.1	+7.3pp	25.2	+3.4pp [47%]	+3.9pp [53%]

Notes: Meaning of columns is as follows: (1) actual rate of union membership; (2) Percentage point change in union density compared to 2011-13. (3) Predicted rate of union membership by grouped years based on model for 2011-2013; (4) Difference between actual membership rate in 2011-13 and that predicted in column (3) - numbers in brackets express share of total change in percentage terms; (5) Difference between actual union membership rate in 2011-2013 and the predicted rate in column (4) - numbers in brackets express share of total change in percentage terms. Predictions are probabilities based on linear probability estimation. Models incorporate gender, age (3 categories), qualifications (3 categories), contract type (2 categories), annual wage (3 categories), firm size (3 categories), industry (2 categories), occupation (3 categories), region (2 categories), and if union at workplace (2 categories).

Table 5: Current, Ex and Never-Membership 2011-13 to 2020-24 (column percentages)

	2011-2013	2014-2016	2017-2019	2020-2024
Member	21.5	24.1	25.7	29.1
Ex-member	16.6	15.8	15.6	13.8
Never-member	60.4	60.0	58.8	57.1
Don't Know	1.5	0.0	0.0	0.0
Sample N	12,000	12,000	12,000	20,000

Notes: SWLW 2011-2024, restricted to Tokyo and Kansai.

Table 6: Intent to Join a Trade Union Among Non-Members, 2011-13 to 2020-24 (column percentages)

	2011-2013	2014-2016	2017-2019	2020-2024
Yes would join	24.8	25.7	27.0	25.1
No would not join	28.3	26.9	26.4	28.0
Don't Know	46.9	47.4	46.6	46.9
Sample N	9,243	9,105	8,920	14,179

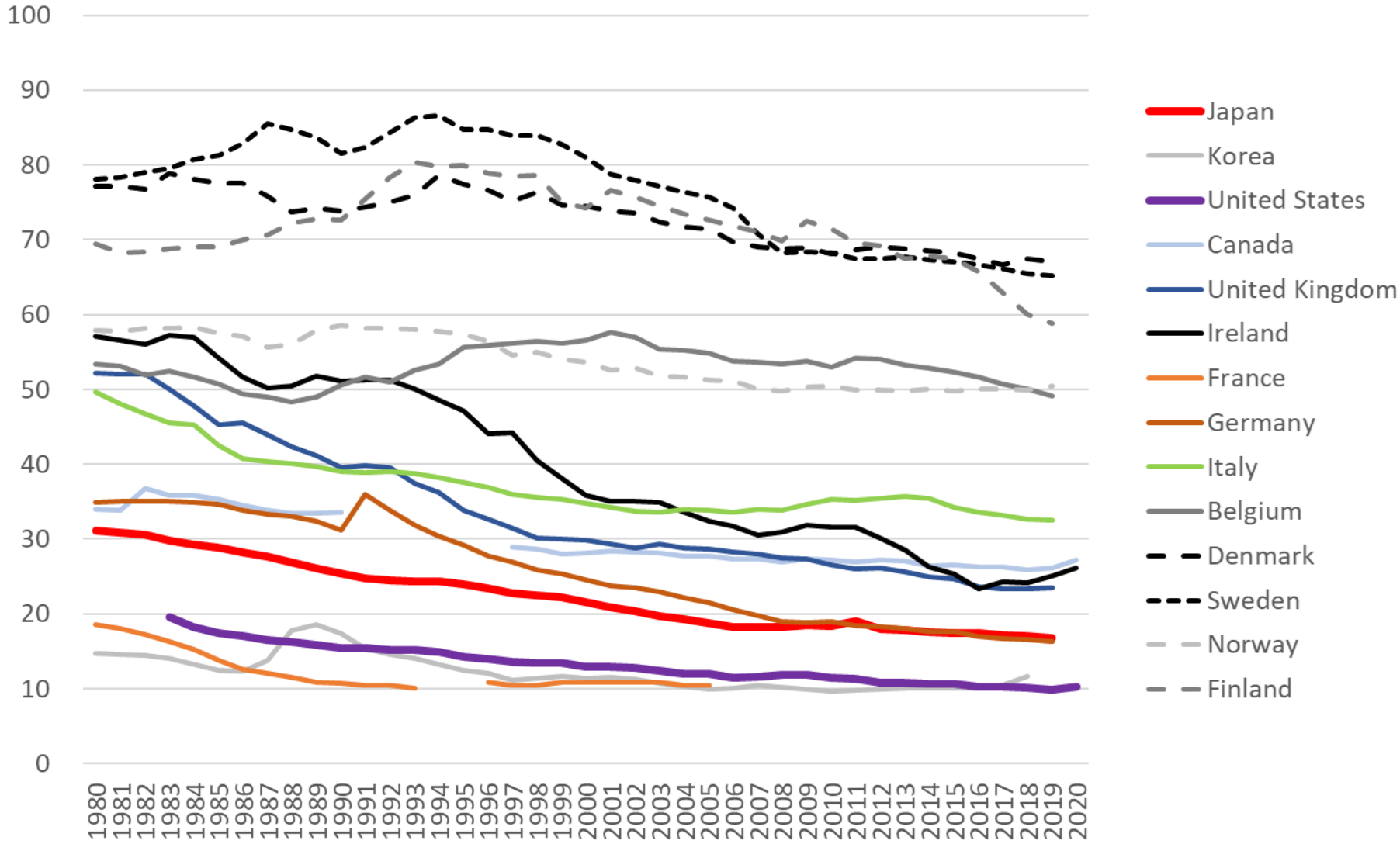
Notes: SWLW 2011-2024, restricted to non-union members of Tokyo and Kansai.

Table 7: Necessity for a Union, 2011-13 to 2020-24, cell percentages

	2011-2013	2014-2016	2017-2019	2020-2024
Necessary				
Members	32.0	31.6	32.9	32.6
Non-members	13.6	14.0	13.2	11.9
Better to have				
Members	41.1	41.3	39.6	39.4
Non-members	34.9	34.2	33.0	30.6
Maybe not/No/Don't Know				
Members	26.9	27.1	27.4	28.0
Non-members	51.5	51.8	53.9	57.5
Sample N	12,000	12,000	12,000	20,000

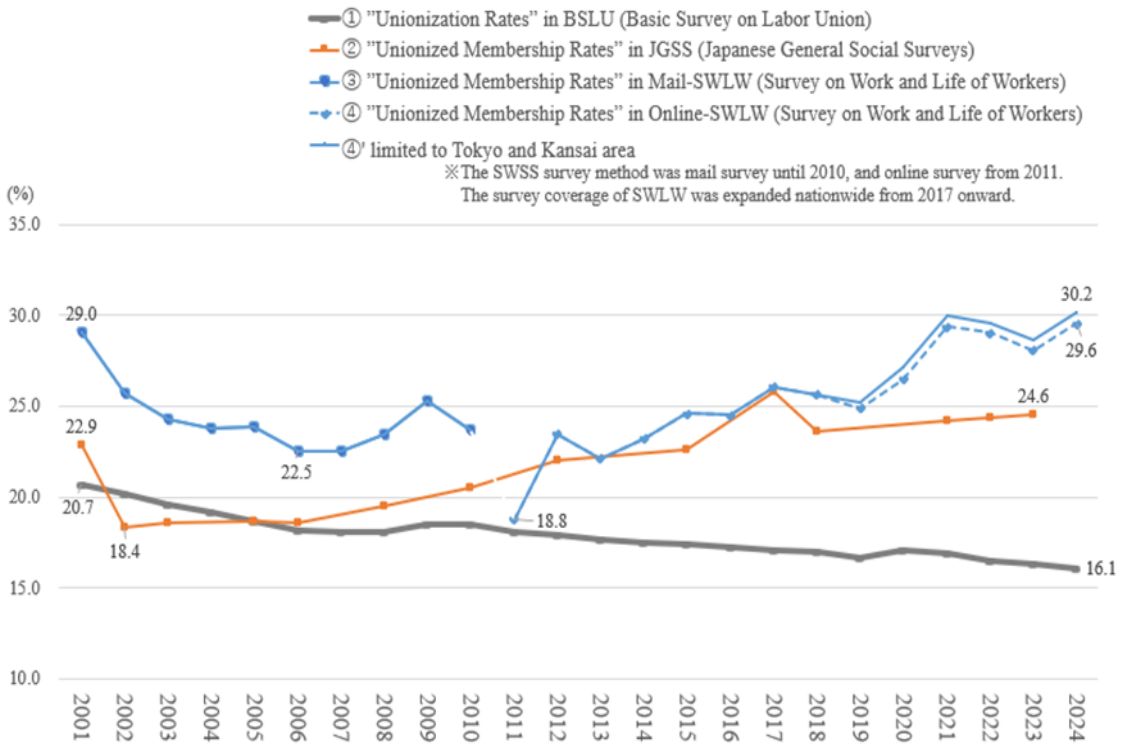
Notes: SWLW 2011-2024, restricted to Tokyo and Kansai

Figure 1 Trade union density (%)



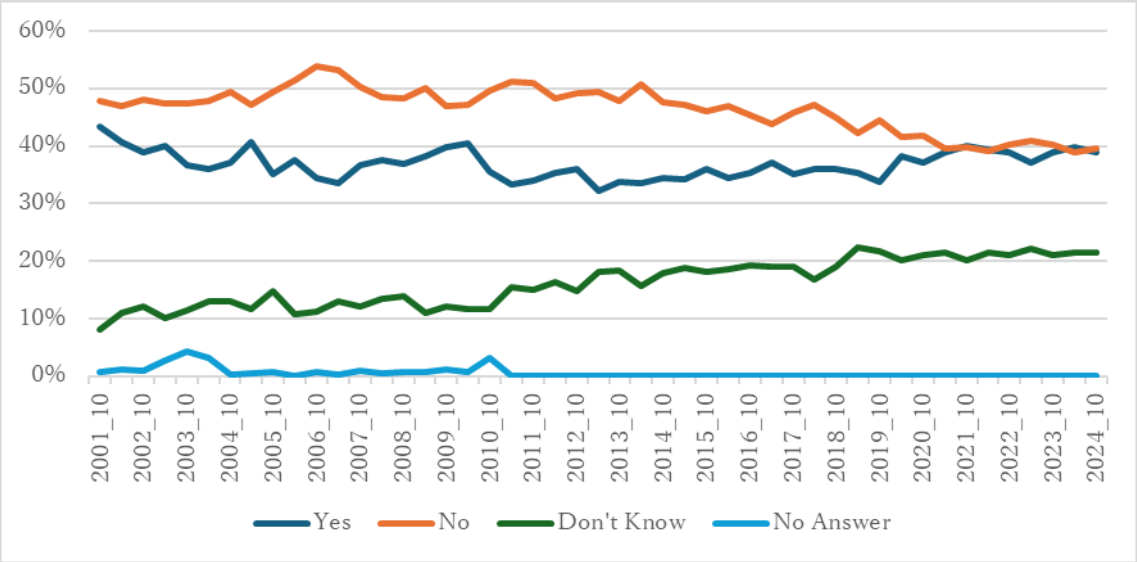
source: OECD Data Explorer, Trade Union Density, extracted on 27th June 2025.

Figure 2 Unionization Rates in Japan



Source: Nakamura et. al. (2024)

Figure 3: Union Presence in the SWLW



Source: SWLW 2001 to 2024. Samples are restricted to Tokyo and Kansai. "No Answer" is not available since 2011.

Appendix

Table A1: Union Presence and Union Membership in SWLW, Full Sample (including other regions from 2018), 2000-2024

SWLW Union1-Presence of Union

	Yes	No	Don't know	No answer	Total
2000					
2001	43.3%	47.9%	8.1%	0.7%	100.0%
2002	39.8%	47.6%	11.6%	1.0%	100.0%
2003	38.4%	47.4%	10.7%	3.5%	100.0%
2004	36.5%	48.6%	13.0%	1.8%	100.0%
2005	37.8%	48.3%	13.3%	0.6%	100.0%
2006	36.0%	52.6%	11.0%	0.4%	100.0%
2007	35.1%	51.7%	12.6%	0.5%	100.0%
2008	37.2%	48.4%	13.7%	0.6%	100.0%
2009	38.9%	48.5%	11.6%	1.0%	100.0%
2010	37.9%	48.4%	11.7%	2.0%	100.0%
2011	33.7%	51.1%	15.3%	0.0%	100.0%
2012	35.7%	48.7%	15.6%	0.0%	100.0%
2013	33.0%	48.6%	18.4%	0.0%	100.0%
2014	34.0%	49.2%	16.9%	0.0%	100.0%
2015	35.0%	46.6%	18.5%	0.0%	100.0%
2016	34.9%	46.2%	19.0%	0.0%	100.0%
2017	36.2%	44.8%	19.1%	0.0%	100.0%
2018	34.8%	48.0%	17.2%	0.0%	100.0%
2019	33.8%	46.0%	20.1%	0.0%	100.0%
2020	35.8%	44.1%	20.1%	0.0%	100.0%
2021	37.7%	42.1%	20.2%	0.0%	100.0%
2022	37.4%	41.5%	21.0%	0.0%	100.0%
2023	36.0%	42.1%	21.9%	0.0%	100.0%
2024	37.7%	41.0%	21.3%	0.0%	100.0%

SWLW Union2-Union Membership

	Yes	No	No answer	Total
2000				
2001	29.0%	71.0%	0.0%	100.0%
2002	25.7%	74.3%	0.0%	100.0%
2003	24.3%	63.9%	11.8%	100.0%
2004	23.8%	65.8%	10.3%	100.0%
2005	23.9%	70.2%	6.0%	100.0%
2006	22.5%	72.5%	5.0%	100.0%
2007	22.6%	72.0%	5.4%	100.0%
2008	23.5%	70.6%	5.9%	100.0%
2009	25.3%	69.3%	5.3%	100.0%
2010	23.7%	71.1%	5.2%	100.0%
2011	18.8%	76.7%	4.5%	100.0%
2012	23.5%	76.5%	0.0%	100.0%
2013	22.2%	77.9%	0.0%	100.0%
2014	23.2%	76.8%	0.0%	100.0%
2015	24.6%	75.4%	0.0%	100.0%
2016	24.5%	75.5%	0.0%	100.0%
2017	26.1%	73.9%	0.0%	100.0%
2018	25.7%	74.3%	0.0%	100.0%
2019	24.9%	75.1%	0.0%	100.0%
2020	26.5%	73.5%	0.0%	100.0%
2021	29.4%	70.6%	0.0%	100.0%
2022	29.1%	70.9%	0.0%	100.0%
2023	28.1%	71.9%	0.0%	100.0%
2024	29.6%	70.4%	0.0%	100.0%

Appendix Table A2: Contribution of Compositional Change and Within-group Change to Union Membership Rate, 2011-2013 to 2020-2024 (excluding union presence)

	(1)	(2)	(3)	(4)	(5)
	Actual union density	Change relative to 2011/13	2011-13 model prediction	Impact of compositional change	Impact of within-group change
2011-2013	21.8	-	21.8	-	-
2014-2016	24.1	+2.3pp	21.8	+0.0pp [0%]	+2.3pp [100%]
2017-2019	25.7	+3.9pp	22.4	+0.6pp [15%]	+3.3pp [85%]
2020-2024	29.1	+7.3pp	23.9	+2.1pp [29%]	+5.2pp [71%]

Notes: Meaning of columns is as follows: (1) actual rate of union membership; (2) Percentage point change in union density compared to 2011-13. (3) Predicted rate of union membership by grouped years based on model for 2011-2013; (4) Difference between actual membership rate in 2011-13 and that predicted in column (3) - numbers in brackets express share of total change in percentage terms; (5) Difference between actual union membership rate in 2011-2013 and the predicted rate in column (4) - numbers in brackets express share of total change in percentage terms. Predictions are probabilities based on linear probability estimation. Models incorporate gender, age (3 categories), qualifications (3 categories), contract type (2 categories), annual wage (3 categories), firm size (3 categories), industry (2 categories), occupation (3 categories), and region (2 categories).

Figure A1: Union Presence in the SWLW, Full Sample (including other regions from 2018), 2000-2024

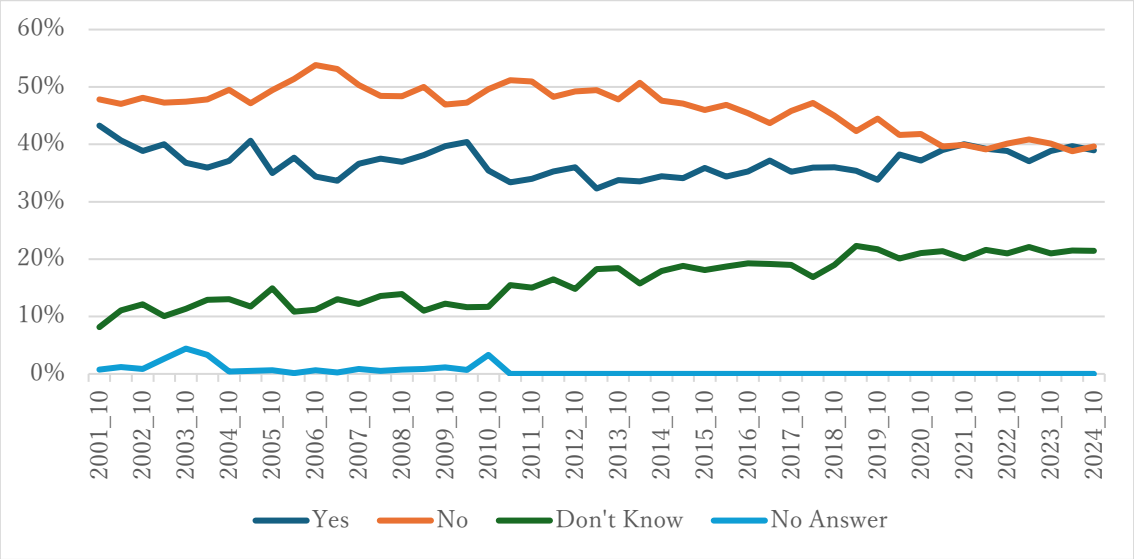


Figure A2: Current, Ex- and Never-Membership, Full Sample (including other regions from 2018), 2003-2024