

Monthly Market Update

August 2025

Trend Summary

- Geographic shift in talent acquisition: Japanese companies are expanding their recruitment of foreign talent westward, focusing on South and Southeast Asia.
- Emerging global demographic trend: Countries considered “population-rich” are now experiencing declining birth rates.
- From Job-based to skill-based hiring: AI is transforming the hiring landscape, driving a shift toward skill-based recruitment and reshaping job structures.
- Japan’s evolving work life dynamics: More women are choosing early motherhood while continuing their careers, and male childcare leave has reached a record 40.5%, reflecting broader changes in parental roles and career aspirations.

Highlights Overview

Market Data

1. HRog reports: full-time job monthly salary on increase to 288,623 yen, temp job hourly wage at 1,573 yen.
2. Persol DODA job-to-applicant ratio increased to 2.33 MoM.
3. The latest MHLW job-to-applicant ratio is 1.22, -0.02 MoM, Tokyo 1.70 & Osaka 1.21, full-time 1.02.
4. In June, Japan saw a 1.2% drop in active job openings and a 0.4% rise in job seekers (seasonally adjusted), while new job postings fell 2.5% year-on-year.

Market Trend

1. Geographic shift in talent acquisition: Japanese companies are expanding their recruitment of foreign talent westward, focusing on South and Southeast Asia.
2. Emerging global demographic trend: Countries considered “population-rich” are now experiencing declining birth rates.
3. From Job-based to skill-based hiring: AI is transforming the hiring landscape, driving a shift toward skill-based recruitment and reshaping job structures.
4. Japan’s evolving work life dynamics: More women are choosing early motherhood while continuing their careers, and male childcare leave has reached a record 40.5%

West Japan Expansion

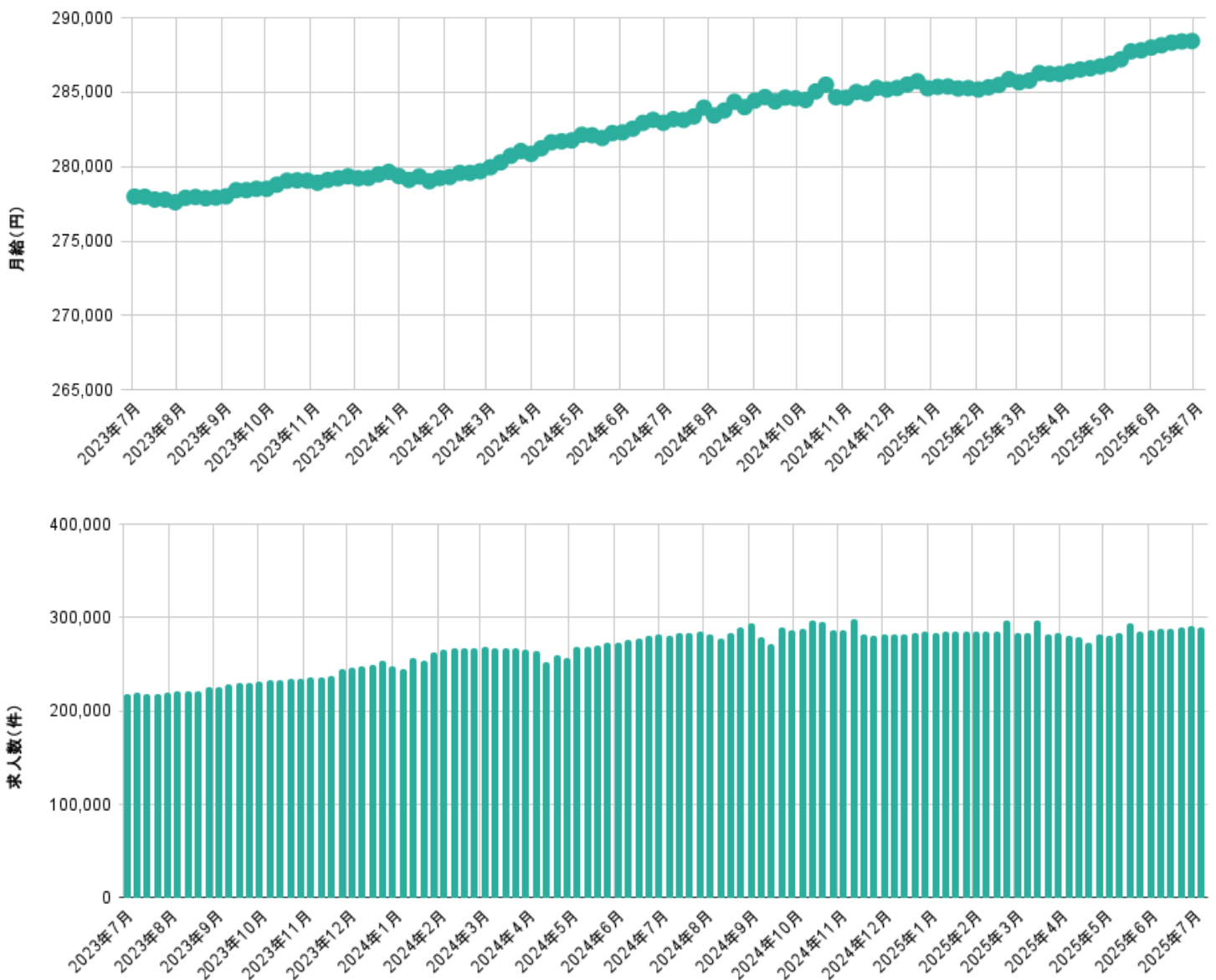
1. Kyoto’s tourism boom is driving economic growth, with hotel room rates surpassing 30,000 yen for the first time.
2. Far East Hospitality opened two new hotels in Osaka, aiming for 2,000 rooms in Japan.
3. Foreign hotels to open in Hyogo and Saga prefectures, ANA Holiday Inn Kobe Mita & ANA Holiday Inn Tosu to open in 2026.
4. Fukuoka attracts global finance firms, boosts startups via CIC, leverages Tenjin Big Bang, and promotes the TEAM FUKUOKA initiative, 10 foreign firms entered in 2024.

Market Highlights

August 2025

Market Data

HRog (HRog Co., Ltd.) reports July 2025 full-time employee average salary & vacancies. Average salary is 288,623 yen, +0.22% (+623 yen) MoM, +2.01% (+5,677) YoY, with 290,067 vacancies, which is +1.34% (+3,835 jobs) MoM/ +3.01% (+8,478 jobs) YoY.

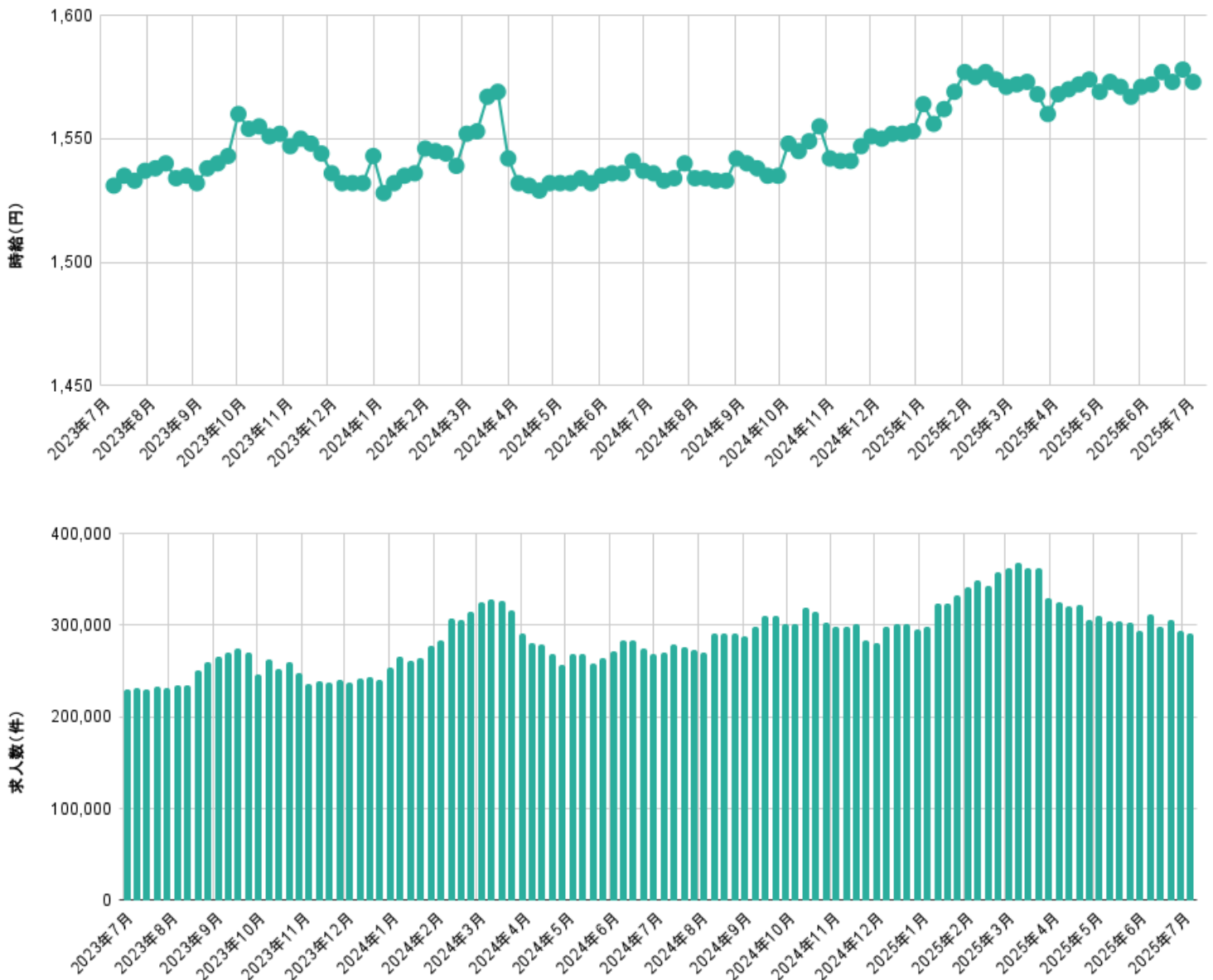


Market Highlights

August 2025

Market Data

HRog (HRog Co., Ltd.) reports July 2025 temp staff average wage & vacancies. Average wage is 1,573yen, +0.13% (+2 yen) MoM, +2.34% (+36 yen) YoY, with 291,205 vacancies, which is -1.01% (-2,961 jobs) MoM/ +8.69% (+23,274 jobs) YoY.



Market Highlights

August 2025

June Persol DODA job-to-applicant ratio is 2.33, +0.05pt MoM. Vacancies +1.7% MoM/+2.0% YoY, job seekers -0.6% MoM/ +13.8% YoY. Job postings increased across all major industries and occupations, with the Energy sector and Sales & Service roles showing the highest growth rates.

doda転職求人倍率・求人数・転職希望者数



(Red: job-to-applicant ratio, pale blue: number of vacancies, blue: number of job seekers)

Market Highlights

August 2025

| | 転職求人 倍率 | 前月差 | 前年 同月差 | 求人数 前月比 | 転職 希望者数 前月比 | | 転職求人 倍率 | 前月差 | 前年 同月差 | 求人数 前月比 | 転職 希望者数 前月比 |
|----------|------------|--------|-----------|------------|-------------------|--------------|------------|--------|-----------|------------|-------------------|
| 全体 | 2.33 | ↑0.05 | ↓-0.27 | 101.7% | 99.4% | 全体 | 2.33 | ↑0.05 | ↓-0.27 | 101.7% | 99.4% |
| IT・通信 | 6.30 | ↓-0.02 | ↓-0.56 | 100.8% | 101.1% | 営業 | 2.66 | -0.00 | ↓-0.26 | 101.7% | 101.5% |
| メディア | 3.23 | ↑0.04 | ↓-0.43 | 101.4% | 100.2% | 企画・管理 | 3.20 | ↑0.09 | ↓-0.06 | 102.8% | 100.0% |
| 金融 | 2.63 | ↑0.03 | ↑0.15 | 102.4% | 101.2% | エンジニア（IT・通信） | 10.54 | ↑0.02 | ↓-0.52 | 100.2% | 100.0% |
| メディカル | 0.95 | ↑0.01 | ↓-0.15 | 101.3% | 99.8% | エンジニア（機械・電気） | 5.22 | ↓-0.10 | ↓-0.69 | 101.3% | 103.3% |
| メーカー | 2.78 | ↑0.02 | ↓-0.28 | 101.7% | 100.9% | 専門職（メディカル） | 0.63 | ↑0.01 | ↓-0.17 | 100.9% | 99.1% |
| 商社 | 1.54 | ↑0.03 | ↓-0.06 | 102.7% | 100.7% | 専門職（化学・食品） | 1.40 | -0.00 | ↓-0.36 | 100.5% | 100.4% |
| 小売・流通 | 0.64 | ↑0.03 | ↑0.02 | 102.7% | 97.3% | 専門職（建設・不動産） | 5.17 | ↓-0.01 | ↓-0.79 | 102.9% | 103.2% |
| レジャー・外食 | 0.74 | ↑0.07 | ↓-0.05 | 104.1% | 94.9% | 専門職（コンサル・金融） | 5.81 | ↑0.05 | ↓-0.97 | 103.7% | 102.8% |
| エネルギー | 2.49 | ↑0.26 | ↓-0.17 | 108.2% | 97.0% | クリエイター | 1.06 | ↑0.04 | ↓-0.22 | 101.6% | 98.1% |
| 建設・不動産 | 4.78 | ↑0.01 | ↓-0.94 | 101.9% | 101.7% | 販売・サービス | 0.66 | ↑0.06 | -0.00 | 104.1% | 94.9% |
| コンサルティング | 7.77 | ↑0.19 | ↑0.02 | 102.1% | 99.6% | 事務・アシスタント | 0.42 | ↑0.01 | ↓-0.04 | 103.1% | 99.5% |
| 人材サービス | 7.41 | ↓-0.07 | ↓-0.38 | 101.3% | 102.2% | その他 | 0.04 | -0.00 | -0.00 | 95.7% | 101.8% |
| その他 | 0.24 | ↑0.01 | ↓-0.04 | 103.5% | 98.3% | | | | | | |

Top items from left: Job to applicant, MoM, YoY, number of vacancies MoM, number of job seekers MoM.

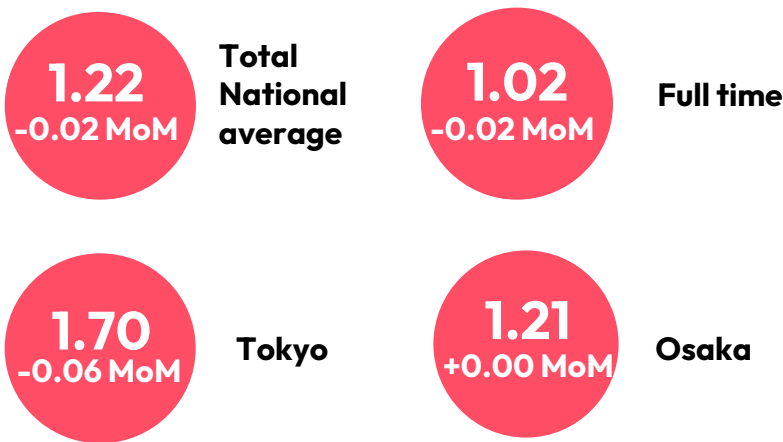
Left table: By sector breakdown: total, ICT, Media, FS, Medical, Manufacturing, Trading firm, retail/distribution, leisure/dining, energy, construction/real estate, Consulting, HR services, others.

Right table: by job type breakdown: total, sales, planning/management, engineer (ICT), engineer (mechatronics), specialist (medical), specialist (chemical/food), specialist (construction/real estate), specialist (consulting/FS), creator, sales/services, administration/assistant, others.

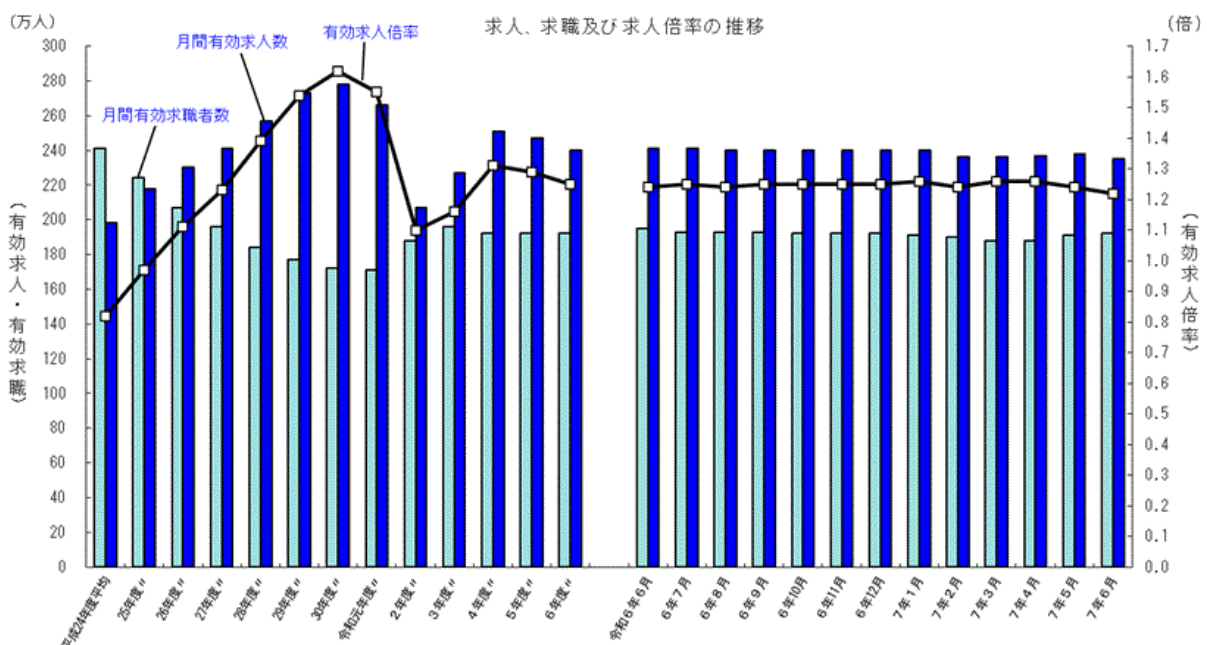
Market Highlights

August 2025

LATEST MHLW JOB-TO-APPLICANT RATIO – AS OF MAY 2025



METI Job to applicant ratio is 1.22, -0.02 pt MoM. New open job ratio is 2.18, +0.04 pt MoM. Perm 1.02, -0.02 pt MoM, Tokyo: 1.70, -0.06 pt MoM, and Osaka 1.21, the same MoM. In June, Japan saw a 1.2% drop in active job openings and a 0.4% rise in job seekers (seasonally adjusted), while new job postings fell 2.5% year-on-year, with increases in industries like IT and construction, but declines in retail, entertainment, and education.



Line: job-to-applicant ratio, blue: number of vacancies, pale blue: number of job seekers, Left: annual trend, right: monthly trend for latest 12 months, Unit 10,000 people.

Market Highlights

August 2025

全国計

Breakdown by jobs (regular jobs excluding part-time jobs)

常用（除パート） 7年6月

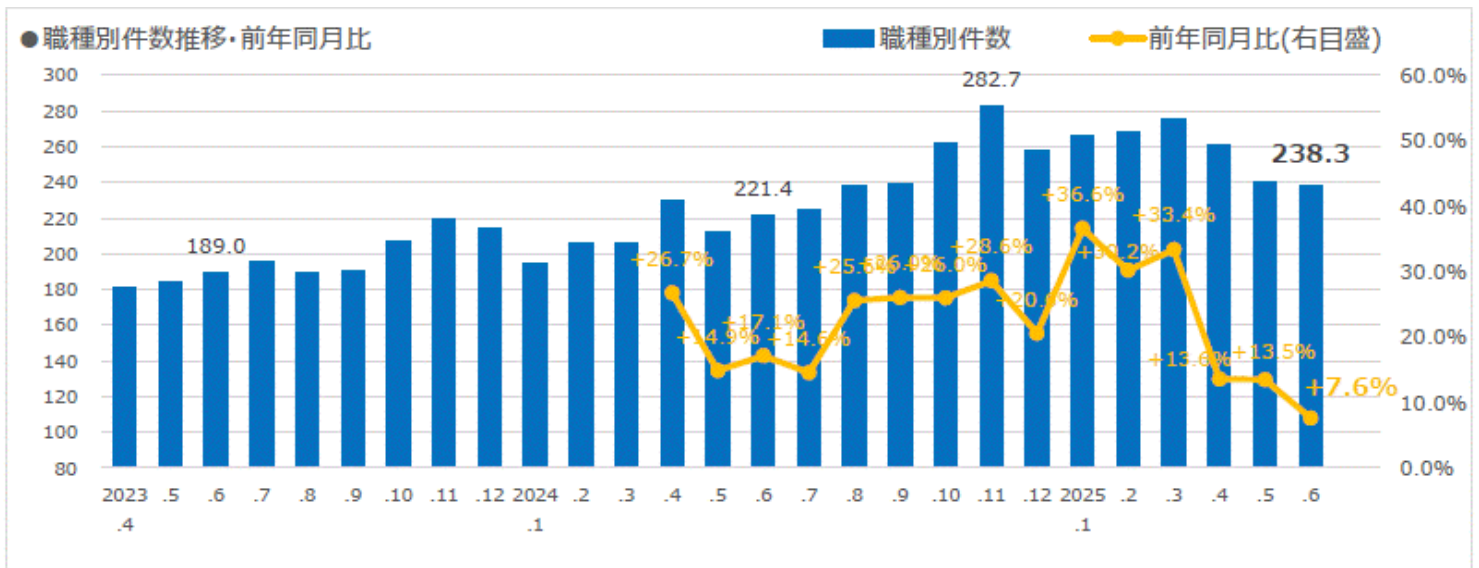
| | 新規求人 | 有効求人 | 新規求職 | 有効求職 | 紹介件数 | 就職件数 | 新規求人 倍率 | 有効求人 倍率 |
|-----------------------|---------|-----------|---------|-----------|---------|--------|------------|------------|
| 職業計 | 451,544 | 1,359,754 | 213,469 | 1,164,307 | 185,411 | 44,356 | 2.12 | 1.17 |
| 管理的職業従事者 | 2,126 | 6,199 | 996 | 5,648 | 1,039 | 106 | 2.13 | 1.10 |
| 専門的・技術的職業従事者 | 118,769 | 354,977 | 33,386 | 189,761 | 26,527 | 7,097 | 3.56 | 1.87 |
| 製造技術者（開発） | 4,765 | 14,905 | 1,143 | 6,752 | 1,182 | 150 | 4.17 | 2.21 |
| 製造技術者（開発を除く） | 3,817 | 11,266 | 2,528 | 13,173 | 1,254 | 222 | 1.51 | 0.86 |
| 建築・土木・測量技術者 | 19,661 | 58,802 | 1,801 | 9,397 | 2,139 | 590 | 10.92 | 6.26 |
| 情報処理・通信技術者 | 17,678 | 54,092 | 4,691 | 32,440 | 5,257 | 375 | 3.77 | 1.67 |
| その他の技術者 | 4,232 | 11,023 | 288 | 1,667 | 502 | 120 | 14.69 | 6.61 |
| 医師、歯科医師、獣医師、薬剤師 | 2,287 | 6,367 | 414 | 2,191 | 130 | 51 | 5.52 | 2.91 |
| 保健師、助産師、看護師 | 20,724 | 61,605 | 6,008 | 28,160 | 4,031 | 1,972 | 3.45 | 2.19 |
| 医療技術者 | 9,021 | 26,819 | 1,888 | 9,321 | 1,101 | 510 | 4.78 | 2.88 |
| その他の保健医療従事者 | 5,577 | 16,881 | 1,375 | 8,334 | 784 | 317 | 4.06 | 2.03 |
| 社会福祉専門職業従事者 | 25,016 | 74,854 | 5,316 | 27,753 | 5,319 | 2,171 | 4.71 | 2.70 |
| 美術家、デザイナー、写真家、映像撮影者 | 1,087 | 3,475 | 3,139 | 22,514 | 1,871 | 158 | 0.35 | 0.15 |
| その他の専門的職業 | 4,904 | 14,888 | 4,795 | 28,059 | 2,957 | 461 | 1.02 | 0.53 |
| 事務従事者 | 43,131 | 124,005 | 53,476 | 314,830 | 70,084 | 10,100 | 0.81 | 0.39 |
| 一般事務従事者 | 27,691 | 78,399 | 43,745 | 259,736 | 50,039 | 7,253 | 0.63 | 0.30 |
| 会計事務従事者 | 4,594 | 13,320 | 4,163 | 23,059 | 7,874 | 1,041 | 1.10 | 0.58 |
| 生産関連事務従事者 | 3,700 | 10,766 | 1,379 | 7,213 | 3,256 | 580 | 2.68 | 1.49 |
| 営業・販売事務従事者 | 4,606 | 13,799 | 2,732 | 14,563 | 6,973 | 829 | 1.69 | 0.95 |
| 外勤事務従事者 | 114 | 328 | 25 | 139 | 100 | 17 | 4.56 | 2.36 |
| 運輸・郵便事務従事者 | 1,683 | 5,210 | 341 | 1,744 | 927 | 246 | 4.94 | 2.99 |
| 事務用機器操作員 | 743 | 2,183 | 1,091 | 8,376 | 915 | 134 | 0.68 | 0.26 |
| 販売従事者 | 43,541 | 137,448 | 12,579 | 65,835 | 13,162 | 2,272 | 3.46 | 2.09 |
| 商品販売従事者 | 16,952 | 57,374 | 5,606 | 30,173 | 4,156 | 1,050 | 3.02 | 1.90 |
| 販売類似職業従事者 | 1,105 | 3,539 | 328 | 1,752 | 293 | 61 | 3.37 | 2.02 |
| 営業職業従事者 | 25,484 | 76,535 | 6,645 | 33,910 | 8,713 | 1,161 | 3.84 | 2.26 |
| サービス職業従事者 | 74,848 | 230,118 | 19,306 | 95,231 | 17,040 | 6,341 | 3.88 | 2.42 |
| 家庭生活支援サービス職業従事者 | 61 | 167 | 32 | 186 | 34 | 8 | 1.91 | 0.90 |
| 介護サービス職業従事者 | 35,116 | 106,883 | 6,219 | 31,066 | 5,628 | 2,799 | 5.65 | 3.44 |
| 保健医療サービス職業従事者 | 4,921 | 14,505 | 1,112 | 4,981 | 2,058 | 828 | 4.43 | 2.91 |
| 生活衛生サービス職業従事者 | 5,981 | 19,605 | 1,206 | 6,892 | 561 | 193 | 4.96 | 2.84 |
| 飲食調理従事者 | 13,624 | 43,884 | 4,418 | 21,441 | 3,268 | 1,294 | 3.08 | 2.05 |
| 接客・給仕職業従事者 | 9,979 | 30,402 | 3,674 | 16,661 | 2,716 | 560 | 2.72 | 1.82 |
| 居住施設・ビル等管理人 | 939 | 2,721 | 911 | 4,795 | 1,254 | 238 | 1.03 | 0.57 |
| その他のサービス職業従事者 | 4,227 | 11,951 | 1,734 | 9,209 | 1,521 | 421 | 2.44 | 1.30 |
| 保安職業従事者 | 17,521 | 53,930 | 1,858 | 8,455 | 3,383 | 1,269 | 9.43 | 6.38 |
| 農林漁業従事者 | 3,305 | 9,892 | 1,804 | 8,791 | 1,402 | 574 | 1.83 | 1.13 |
| 生産工程従事者 | 51,924 | 156,866 | 19,794 | 96,983 | 22,646 | 6,408 | 2.62 | 1.62 |
| 生産設備制御・監視従事者（金属製品） | 1,149 | 3,401 | 767 | 3,375 | 519 | 141 | 1.50 | 1.01 |
| 生産設備制御・監視従事者（金属製品を除く） | 1,959 | 6,070 | 661 | 3,061 | 1,075 | 306 | 2.96 | 1.98 |
| 機械組立設備制御・監視従事者 | 625 | 1,636 | 418 | 2,004 | 235 | 55 | 1.50 | 0.82 |
| 製品製造・加工処理従事者（金属製品） | 11,651 | 34,043 | 3,603 | 16,140 | 4,595 | 1,324 | 3.23 | 2.11 |
| 製品製造・加工処理従事者（金属製品を除く） | 12,987 | 38,768 | 4,791 | 24,039 | 8,258 | 2,509 | 2.71 | 1.61 |
| 機械組立従事者 | 4,992 | 15,344 | 4,409 | 21,721 | 2,578 | 672 | 1.13 | 0.71 |
| 機械整備・修理従事者 | 11,589 | 36,517 | 1,584 | 8,138 | 2,107 | 617 | 7.32 | 4.49 |
| 製品検査従事者（金属製品） | 909 | 2,816 | 584 | 2,422 | 575 | 142 | 1.56 | 1.16 |
| 製品検査従事者（金属製品を除く） | 1,135 | 3,360 | 417 | 1,932 | 765 | 193 | 2.72 | 1.74 |
| 機械検査従事者 | 867 | 2,471 | 389 | 1,903 | 445 | 101 | 2.23 | 1.30 |
| 生産関連・生産類似作業従事者 | 4,061 | 12,440 | 2,171 | 12,248 | 1,494 | 348 | 1.87 | 1.02 |
| 輸送・機械運転従事者 | 34,068 | 103,141 | 10,118 | 44,881 | 10,871 | 4,074 | 3.37 | 2.30 |
| 鉄道運転従事者 | 22 | 120 | 33 | 140 | 6 | 3 | 0.67 | 0.86 |
| 自動車運転従事者 | 26,452 | 79,934 | 6,976 | 29,052 | 7,716 | 3,208 | 3.79 | 2.75 |
| 船舶・航空機運転従事者 | 30 | 104 | 24 | 133 | 13 | 3 | 1.25 | 0.78 |
| その他の輸送従事者 | 1,861 | 5,786 | 1,469 | 7,226 | 1,050 | 296 | 1.27 | 0.80 |
| 定置・建設機械運転従事者 | 5,703 | 17,197 | 1,616 | 8,330 | 2,086 | 564 | 3.53 | 2.06 |
| 建設・探掘従事者 | 38,914 | 113,076 | 4,401 | 20,406 | 4,388 | 1,909 | 8.84 | 5.54 |
| 建設躯体工事従事者 | 6,742 | 19,443 | 542 | 2,346 | 418 | 221 | 12.44 | 8.29 |
| 建設従事者（建設躯体工事従事者を除く） | 10,584 | 30,998 | 1,382 | 6,241 | 1,306 | 488 | 7.66 | 4.97 |
| 電気工事従事者 | 7,309 | 20,666 | 997 | 5,419 | 976 | 371 | 7.33 | 3.81 |
| 土木作業従事者 | 14,175 | 41,638 | 1,464 | 6,335 | 1,656 | 824 | 9.68 | 6.57 |
| 探掘従事者 | 104 | 331 | 16 | 65 | 32 | 5 | 6.50 | 5.09 |
| 運搬・清掃・包装等従事者 | 23,397 | 70,102 | 17,277 | 102,868 | 14,869 | 4,206 | 1.35 | 0.68 |
| 運搬従事者 | 12,524 | 38,807 | 7,815 | 37,076 | 7,856 | 2,074 | 1.60 | 1.05 |
| 清掃従事者 | 4,989 | 14,624 | 2,265 | 14,940 | 3,183 | 998 | 2.20 | 0.98 |
| 包装従事者 | 1,014 | 2,736 | 460 | 2,575 | 720 | 239 | 2.20 | 1.06 |
| その他の運搬・清掃・包装等従事者 | 4,870 | 13,935 | 6,737 | 48,277 | 3,110 | 895 | 0.72 | 0.29 |
| 分類不能の職業 | - | - | 38,474 | 210,618 | - | - | 0.00 | 0.00 |

(注) 上記の数値は、平成21年12月改定の「日本標準職業分類」に基づく区分である。

Market Highlights

August 2025

Zenkyukyo (the Association of Job Information of Japan) reports the number of job ads in June totalled 2,308,011 jobs -0.9% MoM and +7.6% YoY, with finance/legal specialists and security roles showing the highest monthly growth, while education and healthcare service roles saw the largest drops; year-on-year, transport and education roles surged, while technical and medical specialists declined.



● 職種別件数 (占有率TOP10)

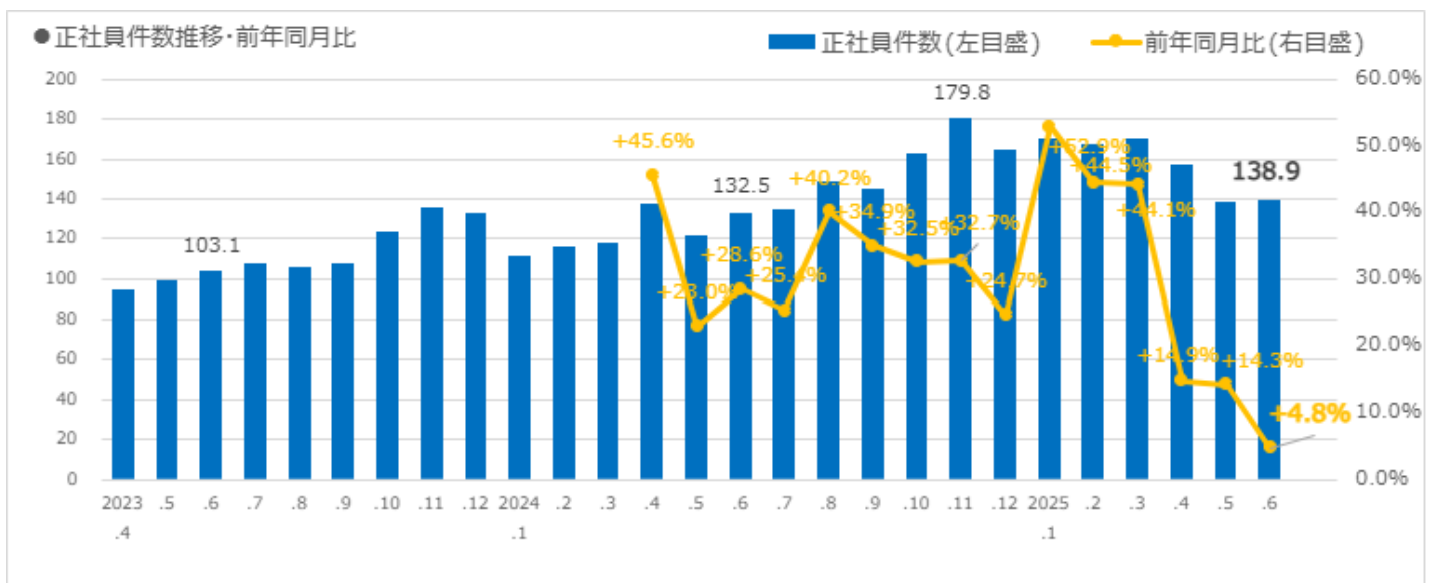
| | 件数 | 前月比 | 前年同月比 |
|------------------|-----------|--------|--------|
| 全体計 | 2,383,011 | -0.9% | +7.6% |
| 事務 | 340,963 | +1.4% | +1.5% |
| 販売 (販売) | 257,646 | -2.0% | -3.6% |
| 専門 (IT技術者) | 250,383 | +0.5% | +11.3% |
| 輸送・機械運転 | 206,936 | +0.5% | +63.7% |
| 販売 (営業) | 169,719 | +0.7% | +14.1% |
| サービス (給仕) | 147,651 | -6.9% | +16.5% |
| 運搬・清掃・包装等 | 139,451 | +3.4% | +10.3% |
| 生産工程 | 119,214 | +2.9% | -2.2% |
| 建設・採掘 | 112,018 | +1.6% | +28.7% |
| 専門 (保育士・教員・講師・イ) | 108,744 | -14.4% | +62.2% |

From top: total, admin, shop sales, IT engineer, transport/machine operation, sales, services (waitering), transport/cleaning/packing, production process, construction/mining, specialist (childcare workers/teachers/lecturers/instructors).

Market Highlights

August 2025

Full-time job ads



●職種別×雇用形態別件数 (占有率TOP10)

| 職種 | 件数 | 前月比 | 前年同月比 |
|---------------|-----------|-------|--------|
| 正社員 | | | |
| 全体計 | 1,389,109 | +0.4% | +4.8% |
| 事務 | 270,201 | +1.4% | -0.3% |
| 専門 (IT技術者) | 240,130 | +0.6% | +12.3% |
| 輸送・機械運転 | 159,957 | +0.3% | +81.5% |
| 販売 (営業) | 146,184 | +0.9% | +14.4% |
| 販売 (販売) | 97,766 | -1.8% | -0.1% |
| 建設・採掘 | 92,209 | +1.6% | +24.3% |
| 専門 (技術者・研究者) | 90,932 | +1.0% | -42.2% |
| 生産工程 | 57,110 | +1.3% | -11.7% |
| 専門 (医療・福祉専門職) | 54,587 | -3.3% | -13.7% |
| サービス (給仕) | 34,882 | -0.2% | +2.6% |

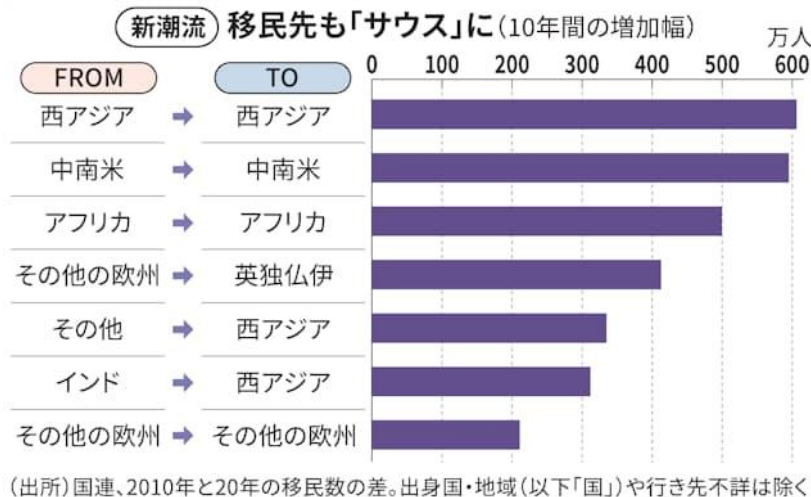
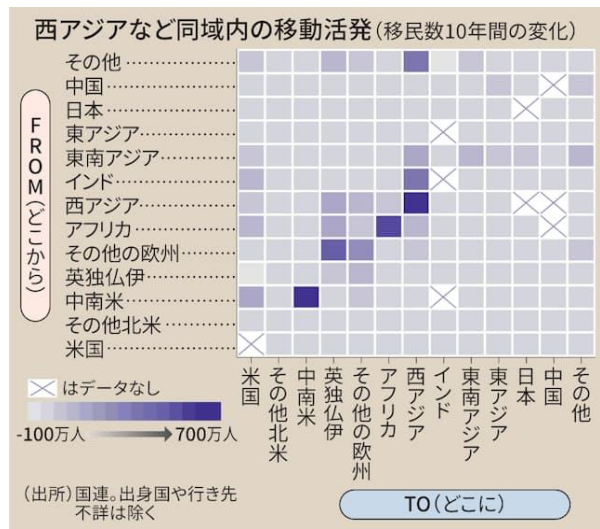
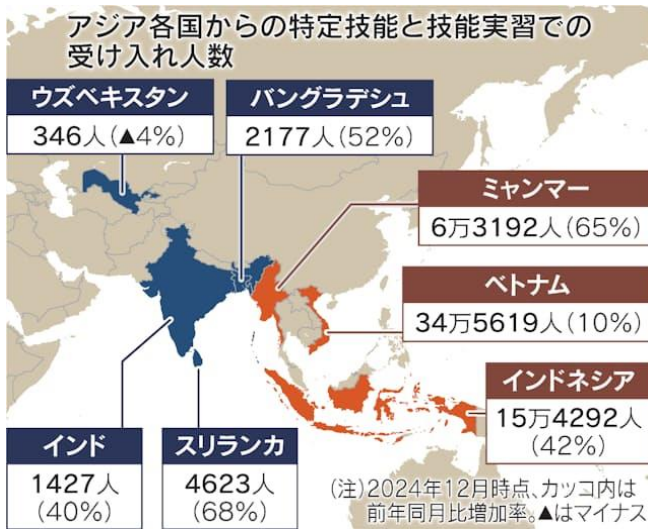
From top: total, admin, IT engineer, transport/machine operation, sales, shop sales, construction/mining, specialist (technical/research), production process, specialist (medical/welfare), services (waitering).

Market Highlights

August 2025

Market trend

Geographic shift in talent acquisition: Japanese companies are expanding their recruitment of foreign talent westward, focusing on South and Southeast Asia. Not only Japanese companies but also multinational corporations are flocking to India for AI and tech talent. A broader trend is emerging: “South to South” migration and investment, capital, labour, and infrastructure are flowing between developing economies, rather than primarily toward the US/EU. Machines, software, and human talent are being redistributed more across the globe, reflecting a shift in the dynamics of global growth and innovation.



外国人材獲得が西へ拡大 東南アジアの成長に先手、バングラ1.5倍 - 日本経済新聞⁶
 移民はサウスからサウスに「米欧集中」今は昔⁷
 [FT]多国籍企業、AI人材を求めてインドへ - 日本経済新聞⁸

Market Highlights

August 2025

Emerging global demographic trend: Countries considered “population-rich” are now experiencing declining birth rates. Countries across Asia are beginning to experience the same labour force shrinkage challenges as developed nations. Thailand’s total Fertility Rate (TFR) has now fallen below Japan’s. Vietnam’s TFR stands at 1.89—below the replacement level— and the government has responded by lifting its two-child policy and easing nationality rules to encourage the return of its diaspora. India, despite its population of 1.46 billion, has a TFR of just 1.96. While Indonesia and Bangladesh still have fertility rates above the replacement level of 2.1, both are on a downward trend. These shifts signal a growing demographic challenge that could reshape labour markets and economic strategies across the region.

| Groups, countries and areas | Total fertility rate (births per woman) | | |
|--|---|-------------|-------------|
| | 1994 | 2024 | 2054 |
| Total fertility rates below 2.1 between 1995 and 2054 | 3.42 | 1.97 | 1.75 |
| Central and Southern Asia | 3.70 | 1.98 | 1.75 |
| Bangladesh | 3.74 | 2.14 | 1.79 |
| Bhutan | 4.87 | 1.45 | 1.47 |
| India | 3.72 | 1.96 | 1.75 |
| Iran (Islamic Republic of) | 3.24 | 1.68 | 1.63 |
| Maldives | 4.69 | 1.56 | 1.54 |
| Nepal | 4.96 | 1.96 | 1.72 |
| Sri Lanka | 2.41 | 1.95 | 1.75 |
| Turkmenistan | 3.62 | 2.66 | 2.08 |
| Eastern and South-Eastern Asia | 3.17 | 2.00 | 1.78 |
| Brunei Darussalam | 2.90 | 1.73 | 1.62 |
| Cambodia | 5.28 | 2.55 | 2.00 |
| Dem. People's Republic of Korea | 2.18 | 1.78 | 1.67 |
| Indonesia | 2.85 | 2.11 | 1.83 |
| Lao People's Democratic Republic | 5.60 | 2.40 | 1.86 |
| Malaysia | 3.35 | 1.54 | 1.53 |
| Mongolia | 2.82 | 2.63 | 1.96 |
| Myanmar | 3.20 | 2.10 | 1.81 |
| Philippines | 4.08 | 1.89 | 1.73 |
| Timor-Leste | 5.91 | 2.63 | 1.88 |
| Viet Nam | 2.94 | 1.89 | 1.73 |

| Eastern and South-Eastern Asia | 1.66 | 1.01 | 1.20 |
|---------------------------------|------|------|------|
| China | 1.63 | 1.01 | 1.20 |
| China, Hong Kong SAR | 1.37 | 0.73 | 0.99 |
| China, Macao SAR | 1.43 | 0.68 | 0.94 |
| China, Taiwan Province of China | 1.77 | 0.86 | 1.10 |
| Japan | 1.47 | 1.22 | 1.36 |
| Republic of Korea | 1.67 | 0.73 | 1.06 |
| Singapore | 1.47 | 0.95 | 1.17 |
| Thailand | 1.93 | 1.20 | 1.31 |

[World Fertility 2024](#)⁹

[Vietnam scraps two-child policy as it tackles falling birthrate | Vietnam | The Guardian](#)¹⁰

[ベトナム、人材不足解消へ自国民呼び戻し 国籍ルールも緩和 - 日本経済新聞](#)¹¹

[India's fertility rate drops below replacement level as population reaches 1.46 billion: UN report](#)¹²

Market Highlights

August 2025

From Job-based to skill-based hiring: AI is transforming the hiring landscape, driving a shift toward skill-based recruitment and reshaping job structures. Rapid AI adoption demands workforce strategies that prioritise skills over roles and flexibility over structures. In Japan, companies have recently begun transitioning from membership-based hiring—focused on generalist roles—to job-based hiring. Now, a global shift is underway: skill-based hiring is redefining recruitment and workforce planning. Companies are placing greater value on adaptable human skills over job titles, enabling greater agility, internal mobility, and preparedness for future roles amid rapid technological change.

[Skills-based hiring even works for roles that don't exist yet | World Economic Forum](#) ¹³

[Is Skills-Based hiring a Future of hiring? | JAC Recruitment Singapore](#) ¹⁴

[The why, the what, and the how of skill-based hiring](#) ¹⁵

AI is transforming recruitment by automating resume screening, which can often be overwhelming for recruiters. It's also reshaping entry-level roles by automating routine tasks—leading to a hiring crisis for new graduates, despite low unemployment rates. For example, marketing professionals now use AI to draft content, while data analysts rely on it to prepare datasets, significantly altering the nature of early-stage jobs. Despite strong earnings, tech giants are accelerating layoffs, driven by AI adoption. Automation is reducing workforce needs, enabling small teams to achieve rapid growth with AI tools, and fundamentally changing job structures.

The growing use of AI in HR is raising regulatory concerns. The EU AI Act is expected to impact global companies—including Japanese firms—using AI in recruitment processes.

[Young People Face a Hiring Crisis. AI Is Making It Worse](#) ¹⁶

[AI is radically changing entry-level jobs, but not eliminating them](#) ¹⁷

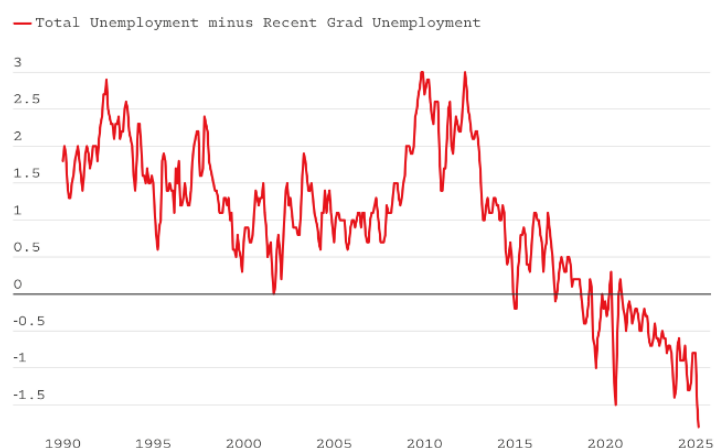
[米テック、好決算でも9万人削減 AIで高まる技術者選別の荒波 - 日本経済新聞](#) ¹⁸

[米企業の人員削減計画が急増、AI導入とトランプ関税が要因 - Bloomberg](#) ¹⁹

[Why TCS's 12,000 layoffs could backfire badly on India's top IT giant](#) ²⁰

[欧州AI規制法が日本の人事業務に与える影響とは? ~日本企業の人事部が理解すべきポイント](#) ²¹

The New Grad Gap



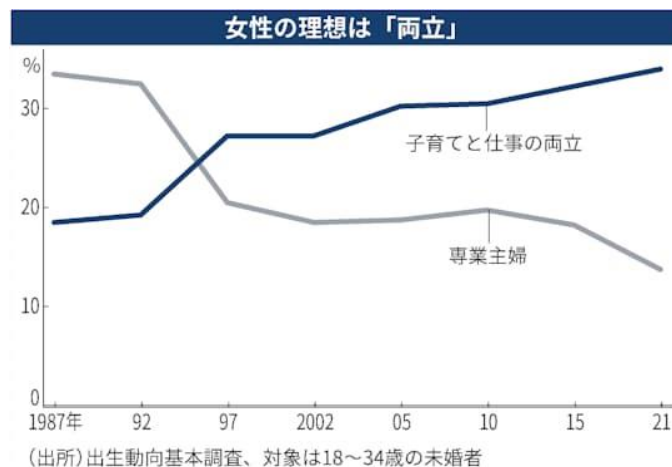
Source: U.S. Census Bureau and U.S. Bureau of Labor Statistics, Current Population Survey (IPUMS).

Market Highlights

August 2025

Japan's evolving work life dynamics: More women are choosing early motherhood while continuing their careers, and male childcare leave has reached a record 40.5%, reflecting broader changes in parental roles and career aspiration. Employee mobility is becoming a challenge—44% of workers say they would consider resigning after a job transfer, and half may quit if transferred again.

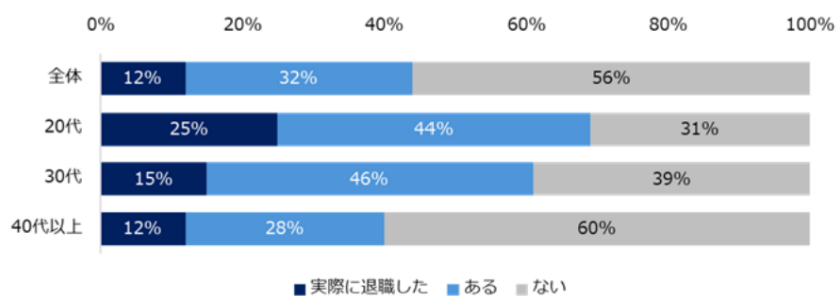
Despite declining full-remote job postings, interest in full-remote work is rising. Younger workers prefer flexibility, and companies offering remote options are attracting talent by addressing communication and information-sharing challenges. Companies need to design multi-modal work styles that reflect shifting life values and support both genders. Companies like NTT are adapting by offering remote work, flexible hours, and a split-shift system to align with these trends.



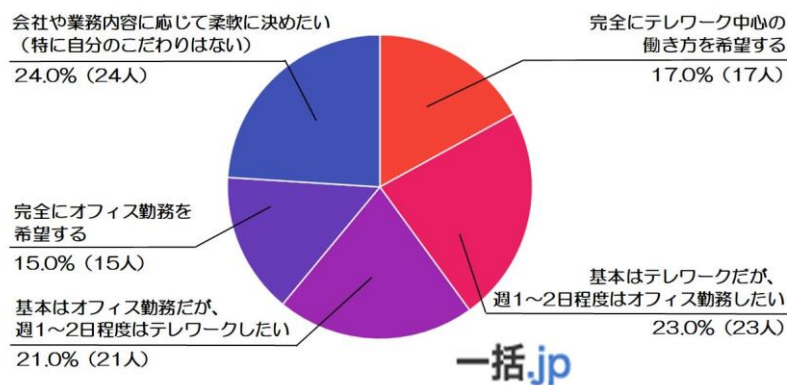
Market Highlights

August 2025

【図4】 転職をしたことが「ある」と回答した方に伺います。転職をきっかけに、退職を考えたことはありますか？（年代別）

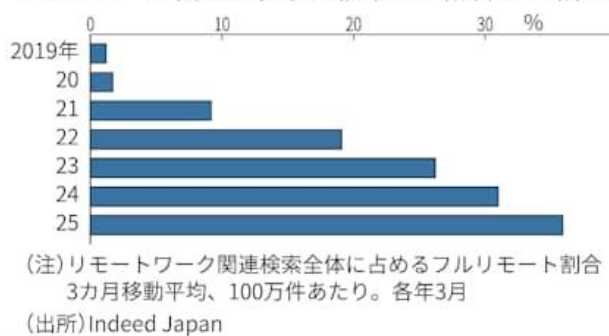


Q1. あなたの希望に最も近い働き方は、次のうちどれですか？

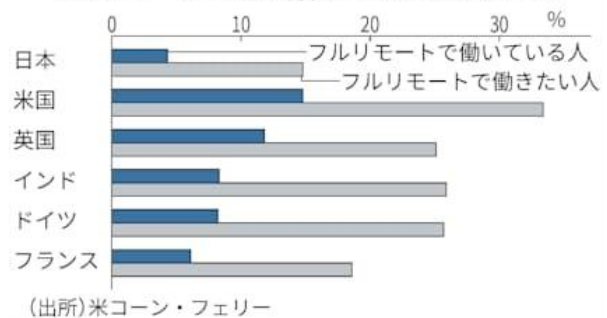


一括.jp

フルリモート関連の仕事を検索する割合は30倍に



フルリモートを巡る現状と理想の差は大きい



女性は若く産みたいのか？ 理想は結婚「28歳」で「両立」増える - 日本経済新聞²²

企業で働く男性の育休取得率 40.5% 前年度より10ポイント余増え過去最高²³

転職経験者の44%が、転職を機に退職を検討 (en Japan)²⁴

NTT、「職場=自宅」が浸透 分断勤務導入、育児と両立²⁵

求職の検索ワード「フルリモート」が1割増 企業は採用条件の強みに - 日本経済新聞²⁶

100人に聞いた！今、30代はどう働く？テレワーク時代のリアルな希望・不安・課題 (会社携帯マッチングサイト『一括.jp』調べ) - IKKATSUお役立ちコラム²⁷

Market Highlights

August 2025

West Japan Expansion

Kyoto's tourism boom is driving economic growth, with hotel room rates surpassing 30,000 yen for the first time. Several new luxury hotels are entering the Japanese market, **Imperial Hotel Kyoto**, opening in Spring 2026, **Capella Kyoto**, a Singapore-based luxury hotel entering Japan in 2026; and **Shangri-La Kyoto Nijo Castle**, a Hong Kong-based luxury hotel to open in late 2026. Also, hotel renovations are underway for **Hotel Okura Kyoto** between 2026-2029, spending four billion yen to upgrade the hotel.

京都経済、観光から好循環 インバウンド活況でホテル客室単価は初の3万円超 - 日本経済新聞²⁸

Far East Hospitality opened two new hotels in Osaka, aiming for 2,000 rooms in Japan. The expansion supports cultural tourism and personalized service under the “Live Like a Local” concept.

ファーイースト・ホスピタリティ、2軒の新規ホテル開業で日本でのプレゼンスを強化²⁹

Foreign hotels to open in Hyogo and Saga prefectures, **ANA Holiday Inn Kobe Mita & ANA Holiday Inn Tosu** to open in 2026.

兵庫県三田市と佐賀県鳥栖市に初の外資系ホテル進出、「ANAホリデイ・イン神戸三田」と「ANAホリデイ・イン鳥栖」2026年の開業見込³⁰

Fukuoka attracts global finance firms, boosts startups via CIC, leverages Tenjin Big Bang, and promotes the TEAM FUKUOKA initiative, 10 foreign firms entered in 2024.

| TEAM FUKUOKA 企業の誘致状況 | | | | | |
|----------------------------|--------|-------------|---------------------------------------|--------|-----------|
| 企業名 | 国 | 分野 | 企業名 | 国 | 分野 |
| MCPホールディングス | 香港 | 資産運用業 | VMO JAPAN | ベトナム | フィンテック |
| Capbridge Financial | シンガポール | フィンテック | マーシュ・マクレナン・ジャパン | アメリカ | コンサル |
| ダルマ・キャピタル | 日本・東京 | フィンテック | 台新國際商業銀行 | 台湾 | 銀行 |
| キュリオ・キッズ | 香港 | 教育 | 勝利証券 | 香港 | 資産運用業 |
| One Asia Lawyers | シンガポール | 士業 | 南富士有限責任監査法人 | 日本・東京 | 士業 |
| ベイクル | 日本・東京 | フィンテック | 台湾銀行 | 台湾 | 銀行 |
| リアライズコーポレーション | 日本・東京 | 資産運用業 | ケンブリッジ・イノベーション・センター (CIC) | アメリカ | スタートアップ支援 |
| ポストンコンサルティンググループ | アメリカ | コンサル | LEVECHY | 日本・東京 | フィンテック |
| ソーシャルワイヤー | 日本・東京 | シェアオフィス | みなと投資 | 新設 | ベンチャー投資 |
| ジェンバクト | アメリカ | コンサル | Origin Ventures | シンガポール | フィンテック |
| Codo Advisory (クラウドアドバイザー) | 新設 | コンサル | UntroD Capital Japan | 日本・東京 | ベンチャー投資 |
| M-DAQ (エムダック) | シンガポール | フィンテック | (Yell) | 日本・東京 | フィンテック |
| 玉山銀行 (イイサン) | 台湾 | 銀行 | Sasuke Financial Lab | 日本・東京 | フィンテック |
| EYストラテジー・アンド・コンサルティング | イギリス | コンサル | Techvify | ベトナム | フィンテック |
| トリニティ・テクノロジー | 日本・東京 | フィンテック | 九州M&Aアドバイザーズ | 新設 | M&A支援 |
| Layer X (レイヤー エックス) | 日本・東京 | フィンテック | CDIB Capital Innovation Advisors Corp | 台湾 | ベンチャー投資 |
| エクサウィザーズ | 日本・東京 | フィンテック | Power Angels | 日本・東京 | ファンド運営 |
| エヌエヌ生命保険 | オランダ | 保険業 (BCP拠点) | | | |

Fukuoka's efforts to attract international financial companies: 35 companies!³¹

Market Highlights

August 2025

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