

# Monthly Market Update

## September 2025

### Trend Summary

- The global Applicant Tracking System (ATS) market was valued at USD 2.7 billion in 2024 and is projected to grow to USD 5.7 billion by 2034, at a CAGR of 8.3%.
- Automated hiring assessments, used by over 90% of employers, enhance recruitment efficiency but often favour analytical traits over creativity and emotional intelligence, potentially excluding strong candidates.
- 68% of tech professionals distrust AI-driven hiring systems, citing a lack of transparency and human oversight.
- Google is shifting back to in-person job interviews to combat rising AI-enabled cheating in virtual hiring.
- GenAI is rapidly transforming the role of managers. Routine tasks such as monitoring progress, reporting, and basic training are increasingly automated, freeing managers to focus on higher-value responsibilities.

### Highlights Overview

#### Market Data

1. HRog reports: full-time job monthly salary on increase to 288,951 yen, temp job hourly wage at 1,565 yen.
2. Persol DODA job-to-applicant ratio increased to 2.42 MoM.
3. The latest MHLW job-to-applicant ratio is 1.22, the same MoM, Tokyo 1.68 & Osaka 1.22, full-time 1.02.
4. Association of Job Information of Japan reports the number of job ads declined MoM but increased YoY in July.

#### Market Trend

1. The global Applicant Tracking System (ATS) market was valued at USD 2.7 billion in 2024 and is projected to grow to USD 5.7 billion by 2034, at a CAGR of 8.3%.
2. 68% of tech professionals distrust AI-driven hiring systems, citing a lack of transparency and human oversight.
3. Google is shifting back to in-person job interviews to combat rising AI-enabled cheating in virtual hiring.
4. GenAI is rapidly transforming the role of managers.

#### West Japan Expansion

1. Many hotels, such as Hoshino Resort, Hilton LXR Hotels & Resorts, Royal Hotel, APA Hotel & Resorts, are opening in Hiroshima to attract inbound tourists.
2. Hotte Holdings to leverage Korea's top-tier hotel know-how to expand Japan hotel operations, plans to operate 20 hotels by 2034.
3. Taiwanese banks are opening a sub-branch in Osaka due to increasing inbound and events like Expo and IR, as well as real estate investments.

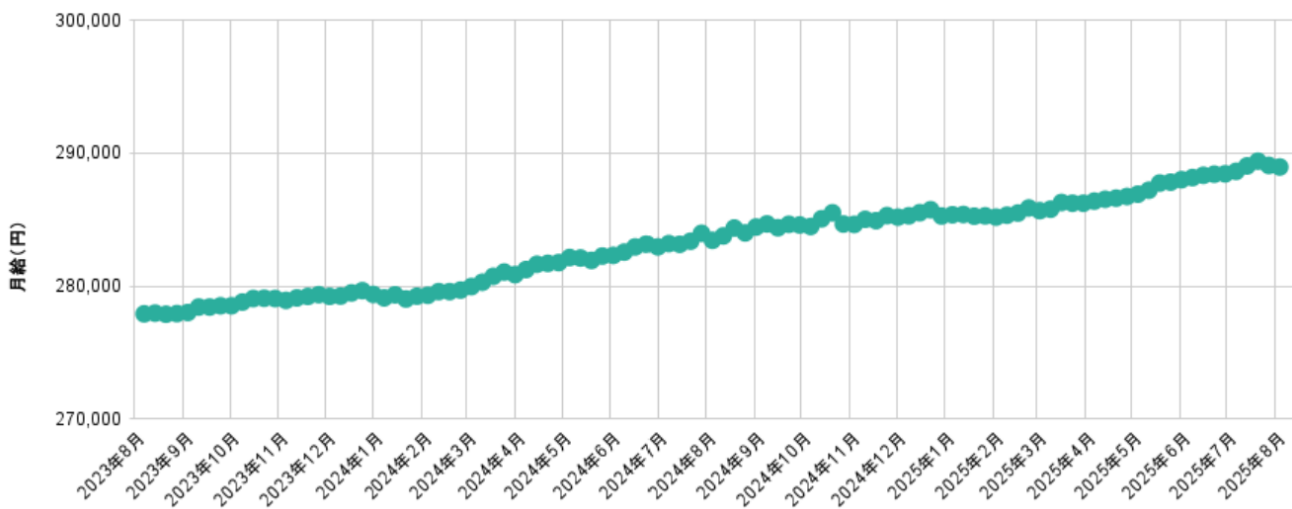
# Market Highlights

## September 2025

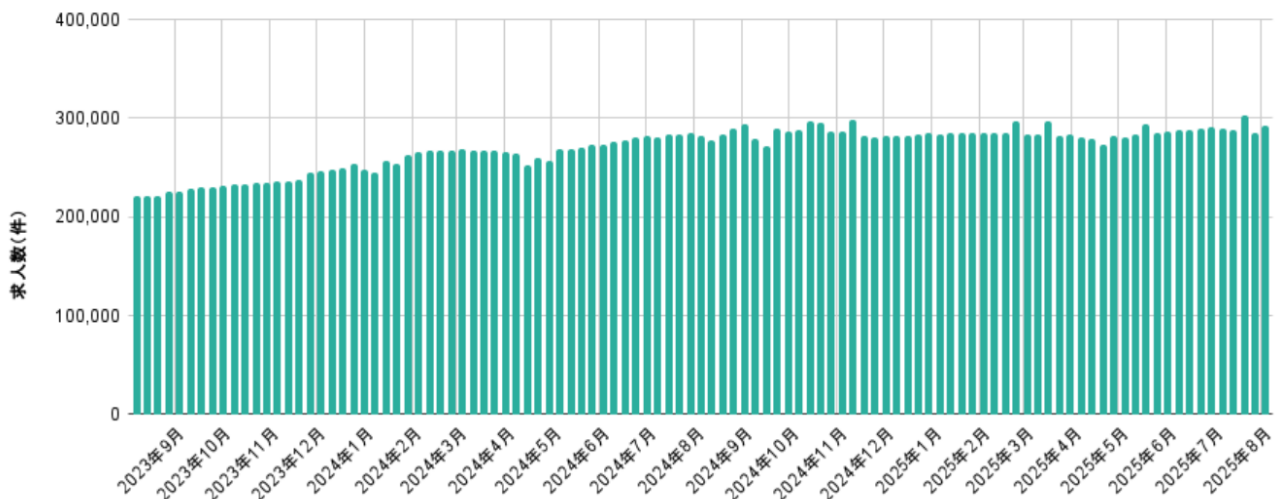
### Market Data

**HRog (HRog Co., Ltd.)** reports Aug 2025 full-time employee average salary & vacancies. Average salary is 288,951 yen, +0.11% (+328 yen) MoM, +1.95% (+5,514) YoY, with 292,268 vacancies, which is +0.76% (+2,201 jobs) MoM/ +3.55% (+10,023 jobs) YoY.

【図1】 全国平均月給 直近25か月の推移



【図2】 全国求人数 直近25か月の推移



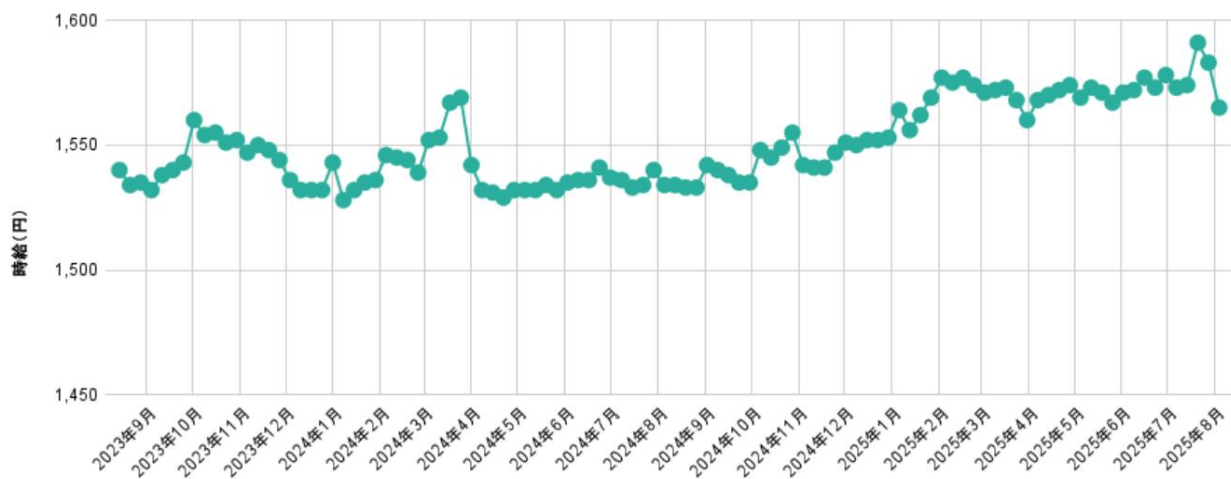
# Market Highlights

## September 2025

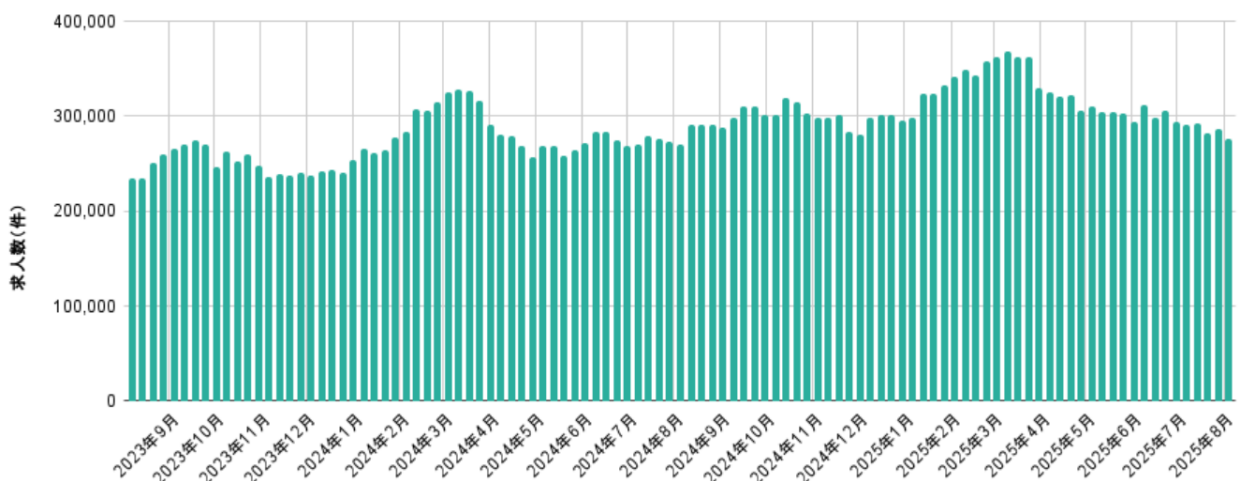
### Market Data

**HRog (HRog Co., Ltd.)** reports Aug 2025 temp staff averages wage & vacancies. Average wage is 1,565 yen, -0.51% (-8 yen) MoM, +2.02% (+31 yen) YoY, with 275,735 vacancies, which is -5.31% (-15,470 jobs) MoM/ +2.14% (+5,786 jobs) YoY.

【図1】 全国平均時給 直近25か月の推移



【図2】 全国求人数 直近25か月の推移

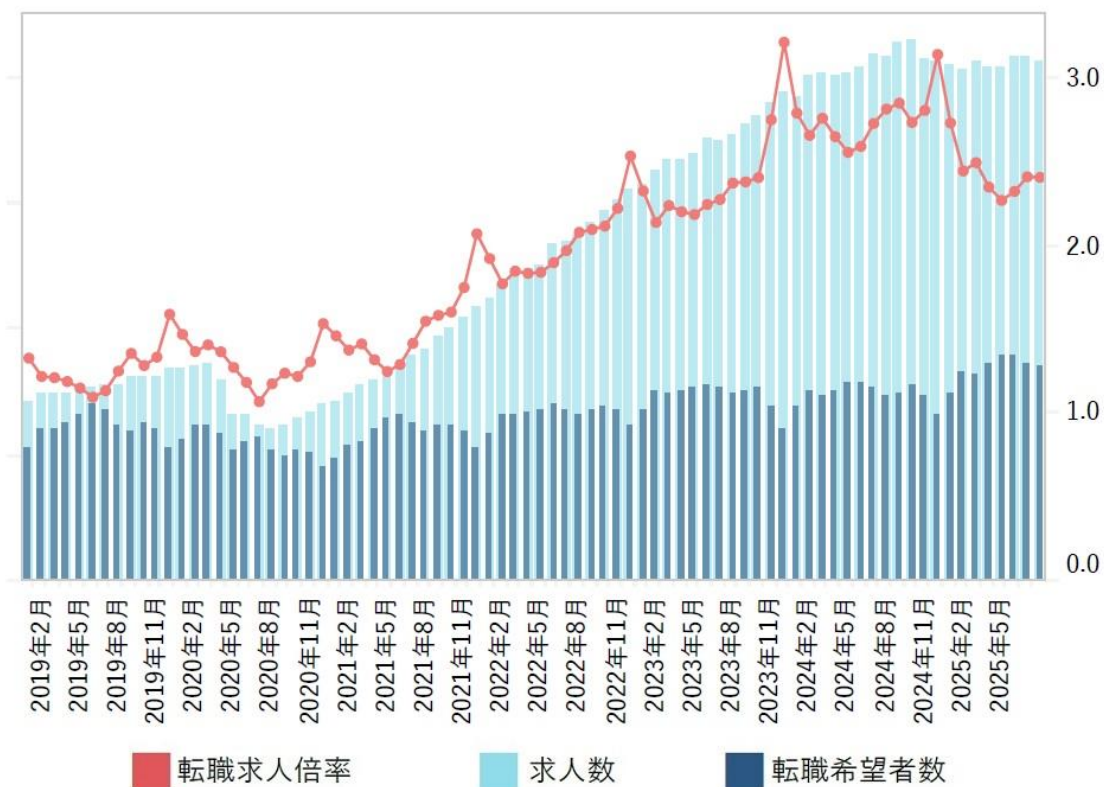


# Market Highlights

## September 2025

July Persol DODA job-to-applicant ratio is 2.42, +0.09 pt MoM. Vacancies +0.4% MoM/-0.1% YoY, job seekers -3.3% MoM/+13.0% YoY. Job postings increased in the manufacturing and consulting industries, as well as in construction/real estate specialists and ICT Engineers.

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

## September 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
全体	2.42	- 0.00	↓-0.41	99.0%	99.1%
IT・通信	6.40	↑0.13	↓-1.05	99.7%	97.7%
メディア	3.36	↑0.05	↓-0.44	97.3%	96.0%
金融	2.62	↓-0.03	↓-0.18	99.9%	100.9%
メディカル	0.96	↓-0.02	↓-0.20	97.5%	99.2%
メーカー	2.93	↑0.03	↓-0.45	98.4%	97.3%
商社	1.56	- 0.00	↓-0.19	97.9%	97.8%
小売・流通	0.67	↓-0.01	↓-0.02	99.2%	100.3%
レジャー・外食	0.76	↓-0.01	↓-0.06	99.0%	100.2%
エネルギー	2.64	↓-0.01	↓-0.04	102.4%	102.8%
建設・不動産	4.87	↓-0.04	↓-1.15	99.2%	100.0%
コンサルティング	7.79	↓-0.14	↓-1.09	100.2%	102.0%
人材サービス	7.90	↑0.24	↓-0.59	99.1%	96.0%
その他	0.24	↓-0.01	↓-0.06	98.2%	100.6%

	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	2.42	↑0.09	↓-0.32	100.4%	96.7%
営業	2.69	↑0.02	↓-0.32	100.9%	100.0%
企画・管理	3.21	↑0.02	↓-0.26	100.0%	99.5%
エンジニア (IT・通信)	10.56	↑0.02	↓-1.37	101.1%	100.8%
エンジニア (機械・電気)	5.37	↑0.15	↓-0.79	99.6%	96.9%
専門職 (メディカル)	0.65	↑0.02	↓-0.15	99.4%	96.4%
専門職 (化学・食品)	1.46	↑0.06	↓-0.37	99.1%	95.2%
専門職 (建設・不動産)	5.40	↑0.23	↓-0.81	102.1%	97.8%
専門職 (コンサル・金融)	5.86	↑0.05	↓-0.67	99.1%	98.3%
クリエイター	1.06	↓-0.01	↓-0.24	97.2%	97.8%
販売・サービス	0.71	↑0.04	- 0.00	100.1%	94.1%
事務・アシスタント	0.42	- 0.00	↓-0.04	95.0%	95.1%
その他	0.05	- 0.00	- 0.00	102.8%	94.6%

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

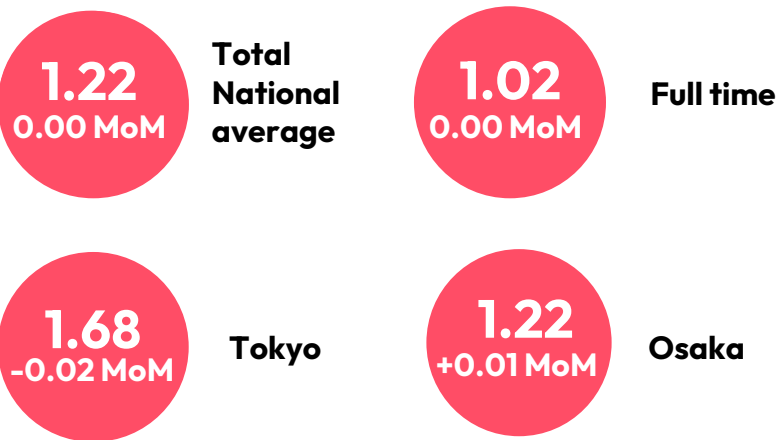
Left table: By sector breakdown: total, ICT, Media, FS, Medical, Manufacturing, Trading firm, retail/distribution, leisure/dining, energy, construction/real estate, Consulting, HR services, others.

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.

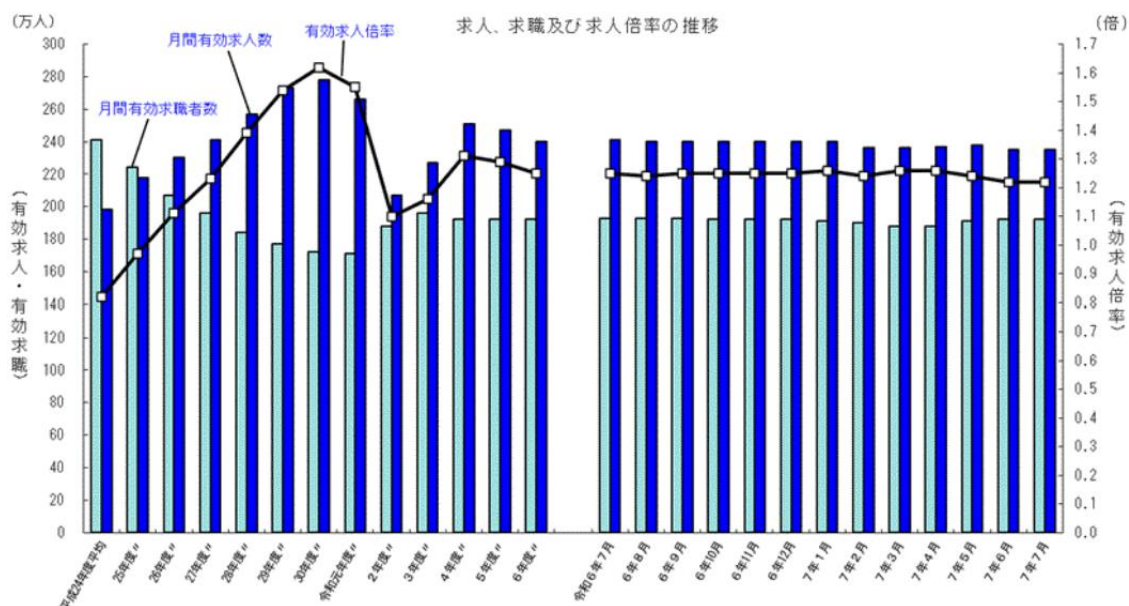
# Market Highlights

## September 2025

### LATEST MHLW JOB-TO-APPLICANT RATIO – AS OF JULY 2025



METI Job to applicant ratio is 1.22, the same MoM. New open job ratio is 2.17, -0.01 pt MoM. Perm 1.02, the same MoM, Tokyo: 1.68, -0.02 pt MoM, and Osaka: 1.22, +0.01 MoM. In July, the unemployment rate dropped to 2.3%, down 0.2 pt, marking the 1<sup>st</sup> decline in five months. Wage increases and improved working conditions are making workers more cautious about changing jobs. Automation and labour-saving investments (like self-check-in machines in hotels) are slowing job growth. Some industries are shifting to flexible work models like spot work. 7月の有効求人倍率1.22倍、前月比横ばい 求人数伸びず - 日本経済新聞<sup>4</sup>



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

# Market Highlights

## September 2025

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

常用(除パート) 7年7月

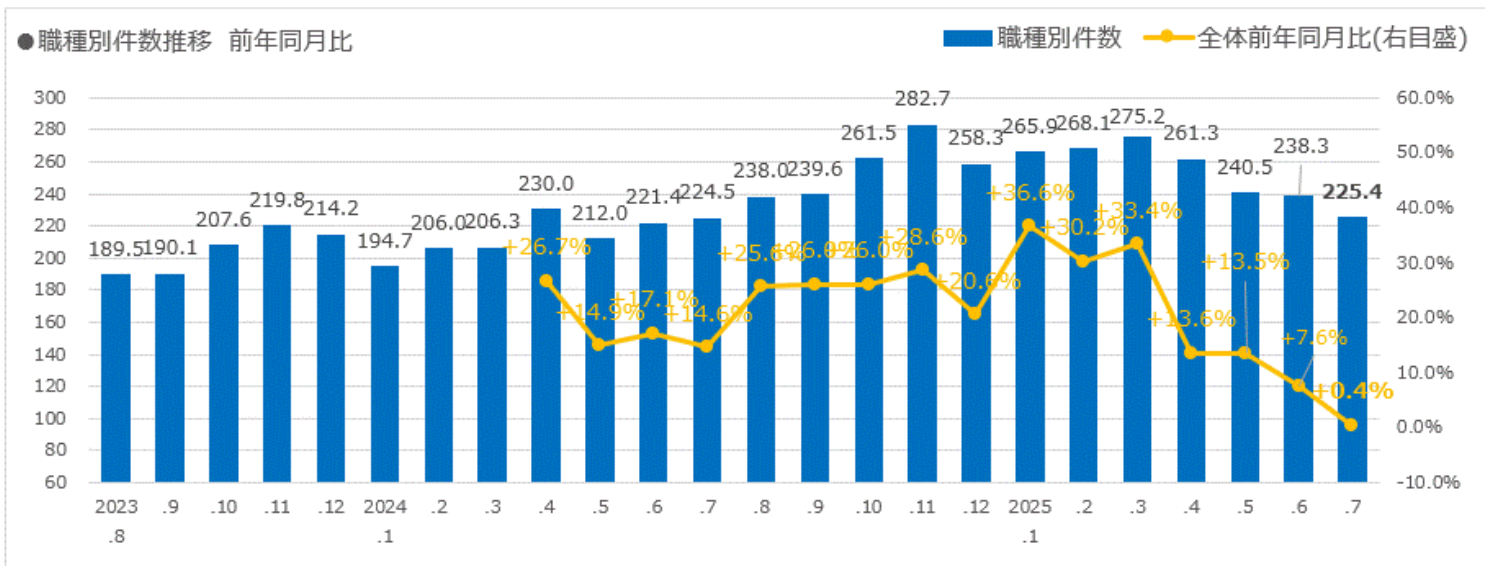
	新規求人	有効求人	新規求職	有効求職	紹介件数	就職件数	新規求人倍率	有効求人倍率
職業計	488,215	1,368,481	225,153	1,153,496	188,736	44,128	2.17	1.19
管理的職業従事者	2,002	5,662	1,210	5,562	1,064	127	1.65	1.02
専門的・技術的職業従事者	123,616	357,123	36,488	187,594	27,195	6,960	3.39	1.90
製造技術者(開発)	5,108	14,721	1,231	6,672	1,170	160	4.15	2.21
製造技術者(開発を除く)	4,073	11,484	2,657	13,036	1,202	261	1.53	0.88
建築・土木・測量技術者	20,040	58,622	1,953	8,894	2,075	548	10.26	6.59
情報処理・通信技術者	18,326	53,330	5,428	32,699	5,394	425	3.38	1.63
その他の技術者	2,315	10,910	342	1,660	476	107	6.77	6.57
医師、歯科医師、獣医師、薬剤師	2,163	6,241	466	2,166	181	50	4.64	2.88
保健師、助産師、看護師	22,561	62,500	6,809	28,065	4,200	1,934	3.31	2.23
医療技術者	9,725	27,439	2,049	9,217	1,075	492	4.75	2.98
その他の保健医療従事者	5,551	16,883	1,508	8,176	847	321	3.68	2.06
社会福祉専門職業従事者	26,978	76,299	5,593	27,243	5,348	2,082	4.82	2.80
美術家、デザイナー、写真家、映像撮影者	1,160	3,438	3,270	22,670	2,163	141	0.35	0.15
その他の専門的職業	5,616	15,256	5,182	27,096	3,064	439	1.08	0.56
事務従事者	46,202	124,759	56,456	311,410	71,470	9,810	0.82	0.40
一般事務従事者	29,359	78,569	45,914	256,615	50,935	6,993	0.64	0.31
会計事務従事者	5,039	13,537	4,523	22,931	8,152	1,068	1.11	0.59
生産関連事務従事者	3,967	10,808	1,485	7,176	3,249	572	2.67	1.51
営業・販売事務従事者	5,089	13,899	2,895	14,378	7,053	810	1.76	0.97
外勤事務従事者	147	339	23	119	97	18	6.39	2.85
運輸・郵便事務従事者	1,743	5,334	408	1,785	938	200	4.27	2.99
事務用機器操作員	858	2,273	1,208	8,406	1,046	149	0.71	0.27
販売従事者	50,300	138,672	13,041	65,583	13,449	2,256	3.86	2.11
商品販売従事者	22,115	58,329	5,755	30,171	4,115	1,028	3.84	1.93
販売類似職業従事者	1,202	3,348	306	1,754	335	57	3.93	1.91
営業職業従事者	26,983	76,995	6,980	33,658	8,999	1,171	3.87	2.29
サービス職業従事者	81,271	231,285	20,156	94,795	17,064	6,007	4.03	2.44
家庭生活支援サービス職業従事者	52	159	37	177	26	3	1.41	0.90
介護サービス職業従事者	37,836	108,548	6,824	31,117	5,802	2,721	5.54	3.49
保健医療サービス職業従事者	5,350	14,682	1,123	4,848	2,035	716	4.76	3.03
生活衛生サービス職業従事者	6,808	19,440	1,213	6,916	561	208	5.61	2.81
飲食物調理従事者	16,566	43,852	4,535	21,281	3,248	1,199	3.65	2.06
接客・給仕職業従事者	9,292	29,907	3,632	16,861	2,544	558	2.56	1.77
居住施設・ビル等管理人	1,071	2,728	1,010	4,611	1,319	207	1.06	0.59
その他のサービス職業従事者	4,296	11,969	1,782	8,984	1,529	395	2.41	1.33
保安職業従事者	21,685	55,600	1,828	8,105	3,225	1,227	11.86	6.86
農林漁業従事者	3,557	9,775	1,746	8,753	1,347	576	2.04	1.12
生産工程従事者	57,389	158,473	21,142	97,651	22,932	6,776	2.71	1.62
生産設備制御・監視従事者(金属製品)	1,307	3,549	874	3,453	522	148	1.50	1.03
生産設備制御・監視従事者(金属製品を除く)	2,170	6,086	693	3,024	1,156	331	3.13	2.01
機械組立設備制御・監視従事者	524	1,655	458	2,042	304	60	1.14	0.81
製品製造・加工処理従事者(金属製品)	12,261	34,213	3,673	16,227	4,503	1,372	3.34	2.11
製品製造・加工処理従事者(金属製品を除く)	14,279	39,136	5,226	24,169	8,328	2,668	2.73	1.62
機械組立従事者	6,078	15,824	4,791	21,993	2,598	699	1.27	0.72
機械整備・修理従事者	13,306	36,826	1,697	8,150	2,137	657	7.84	4.52
製品検査従事者(金属製品)	1,120	2,918	546	2,423	583	164	2.05	1.20
製品検査従事者(金属製品を除く)	1,338	3,466	435	1,963	818	215	3.08	1.77
機械検査従事者	816	2,507	422	1,890	437	115	1.93	1.33
生産関連・生産類似作業従事者	4,190	12,293	2,327	12,317	1,546	347	1.80	1.00
輸送・機械運転従事者	37,577	103,582	10,614	44,576	11,565	4,126	3.54	2.32
鉄道運転従事者	54	110	37	137	19	4	1.46	0.80
自動車運転従事者	29,134	80,387	7,268	28,920	8,305	3,246	4.01	2.78
船舶・航空機運転従事者	37	98	19	124	16	4	1.95	0.79
その他の輸送従事者	2,128	5,654	1,597	7,244	1,135	275	1.33	0.78
定置・建設機械運転従事者	6,224	17,333	1,693	8,151	2,090	597	3.68	2.13
建設・探掘従事者	38,108	112,052	4,265	19,806	4,265	1,889	8.94	5.66
建設躯体工事従事者	6,137	18,879	526	2,276	417	198	11.67	8.29
建設従事者(建設躯体工事従事者を除く)	10,564	30,658	1,312	6,094	1,227	482	8.05	5.03
電気工事従事者	6,868	20,455	1,012	5,393	982	385	6.79	3.79
土木作業従事者	14,443	41,756	1,398	5,978	1,591	805	10.33	6.98
探掘従事者	96	304	17	65	48	19	5.65	4.68
運搬・清掃・包装等従事者	26,508	71,498	17,991	102,562	15,160	4,374	1.47	0.70
運搬従事者	15,133	40,337	8,110	37,362	8,113	2,209	1.87	1.08
清掃従事者	5,489	14,690	2,307	14,733	3,100	994	2.38	1.00
包装従事者	922	2,677	504	2,612	722	210	1.83	1.02
その他の運搬・清掃・包装等従事者	4,964	13,794	7,070	47,855	3,225	961	0.70	0.29
分類不能の職業	-	-	40,216	207,099	-	-	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

## September 2025

Zenkyukyo (the Association of Job Information of Japan) reports the number of job ads in July totalled 2,253,532 jobs -5.4% MoM and +0.4% YoY. Since 2024 H2, job ads hovered in the high 2 million range, but in 2025, they've shifted to the low 2 million range. Although still above the previous year, the number has been declining since April 2025.



● 職種別件数 (占有率TOP10)

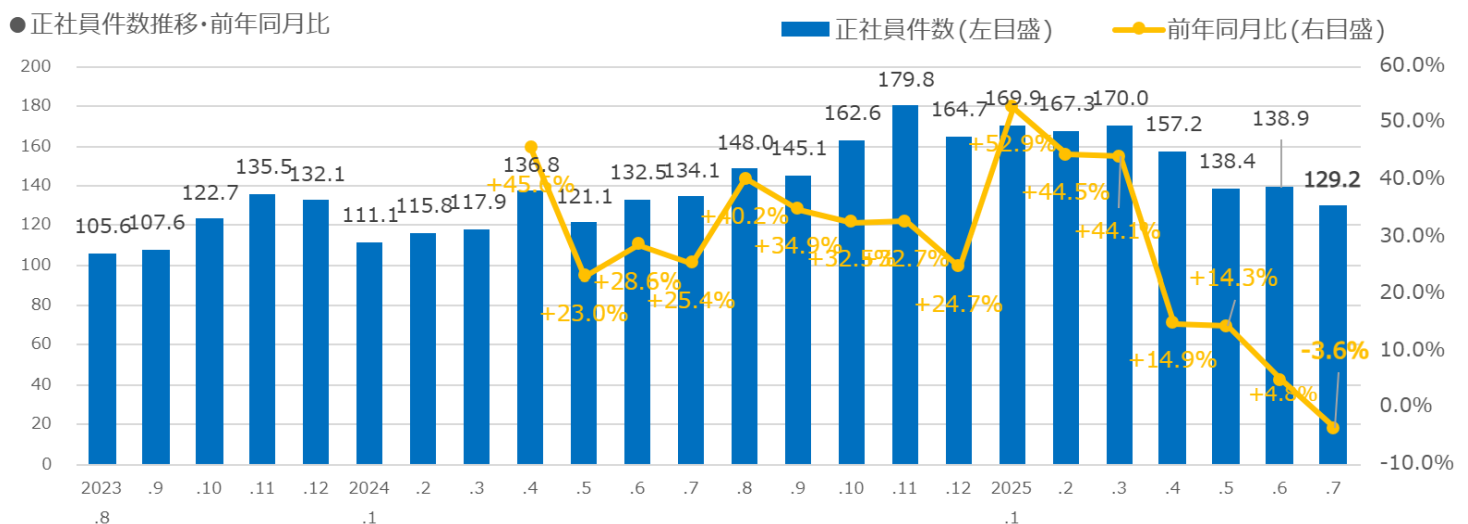
	件数	前月比	前年同月比
全体計	2,253,532	-5.4%	0.4%
事務	291,400	-14.5%	-15.7%
販売 (販売)	253,721	-1.5%	-9.5%
専門 (IT技術者)	223,874	-10.6%	-11.3%
輸送・機械運転	189,237	-8.6%	+8.2%
販売 (営業)	154,558	-8.9%	+0.9%
運搬・清掃・包装等	135,785	-2.6%	+8.3%
サービス (給仕)	133,590	-9.5%	+6.3%
専門 (保育士・教員・講師・インストラクター)	118,693	+9.1%	+83.0%
生産工程	118,132	-0.9%	-9.3%
建設・採掘	117,016	+4.5%	+43.7%

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

# Market Highlights

## September 2025

### Full-time job ads



● 職種別×雇用形態別件数 (占有率TOP10)

正社員	件数	前月比	前年同月比
全体計	1,292,450	-7.0%	-3.6%
事務	227,163	-15.9%	-18.5%
専門 (IT技術者)	211,940	-11.7%	-11.8%
輸送・機械運転	141,719	-11.4%	+8.2%
販売 (営業)	135,578	-7.3%	+3.9%
建設・採掘	97,596	+5.8%	+43.4%
販売 (販売)	97,436	-0.3%	-7.3%
専門 (技術者・研究者)	89,659	-1.4%	-0.8%
生産工程	59,523	+4.2%	-14.7%
専門 (医療・福祉専門職)	52,197	-4.4%	-15.6%
サービス (給仕)	34,892	+0.0%	+3.1%

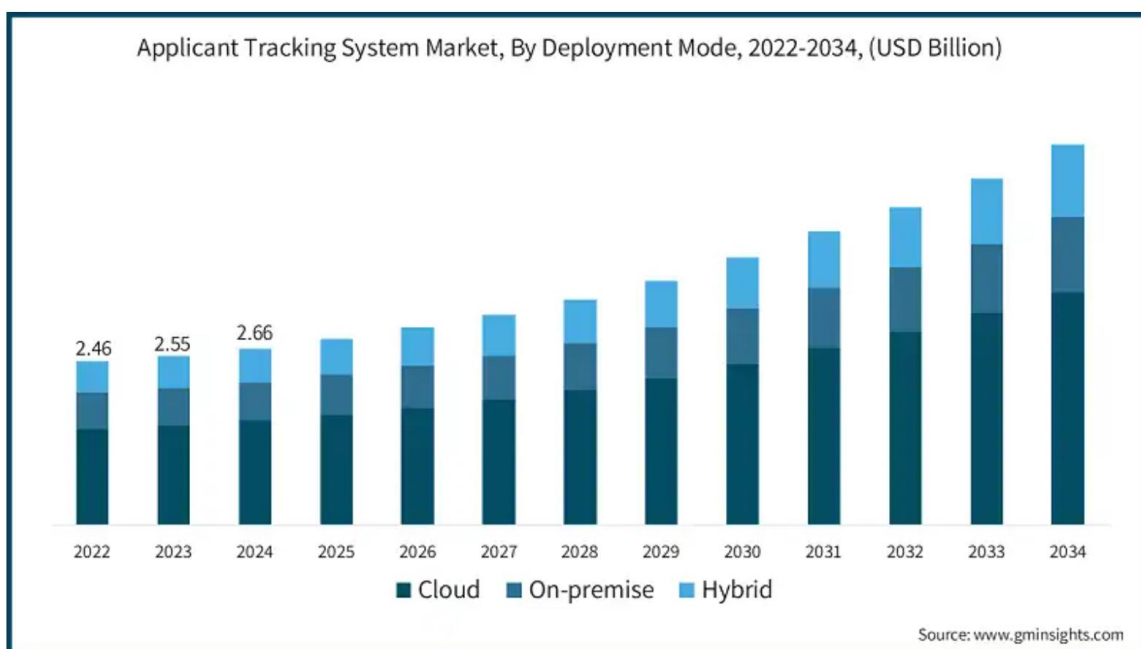
From top: total, admin, IT engineer, transport/machine operation, sales, construction/mining, shop sales, specialist (technical/research), production process, specialist (medical/welfare), services (waitering).

# Market Highlights

## September 2025

### Market trend

**The global Applicant Tracking System (ATS) market was valued at USD 2.7 billion in 2024 and is projected to grow to USD 5.7 billion by 2034, at a CAGR of 8.3%.** This growth is driven by the increasing adoption of AI and automation in recruitment, along with rising demand for centralized platforms that unify sourcing, tracking, and communication. Organizations are seeking integrated solutions to overcome inefficiencies of fragmented systems. North America leads adoption, while Asia-Pacific shows rapid expansion. [Applicant Tracking System Market Size, Forecasts 2025-2034](#)<sup>7</sup>



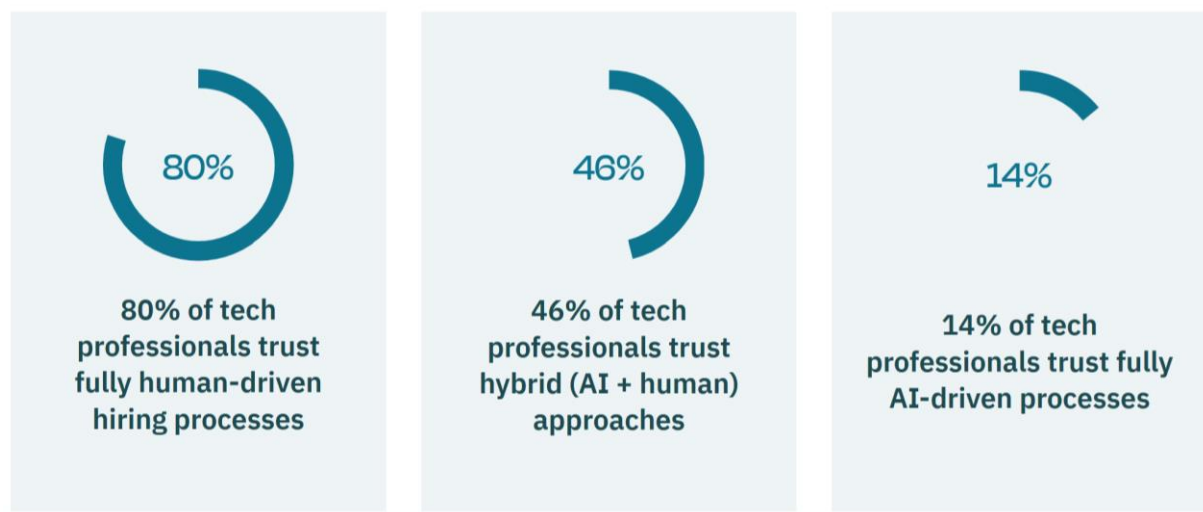
**Automated hiring assessments, used by over 90% of employers, enhance recruitment efficiency but often favour analytical traits over creativity and emotional intelligence, potentially excluding strong candidates.** These systems can also create accessibility challenges, prolong hiring timelines, and introduce bias. As a result, experts advocate for more inclusive and balanced approaches—such as hybrid assessments, clearer communication, and validation of job-relevant skills—to ensure fairer outcomes and better candidate experiences.

[The Impact Of Hiring Assessments On Job Seekers In The Hiring Process](#)<sup>8</sup>

# Market Highlights

September 2025

**68% of tech professionals distrust AI-driven hiring systems, citing a lack of transparency and human oversight.** Nearly 30% are considering leaving the tech industry, with women disproportionately affected. 92% believe qualified candidates are overlooked due to keyword bias, and 78% feel pressured to exaggerate qualifications. Dice reports that the issue isn't AI itself, but how it's deployed. Hybrid models combining AI with human decision-making earn significantly more trust, highlighting the need for fairer, more transparent recruitment practices. [The AI Trust Gap - The Trust Gap in Tech Hiring 2025](#)<sup>9</sup>



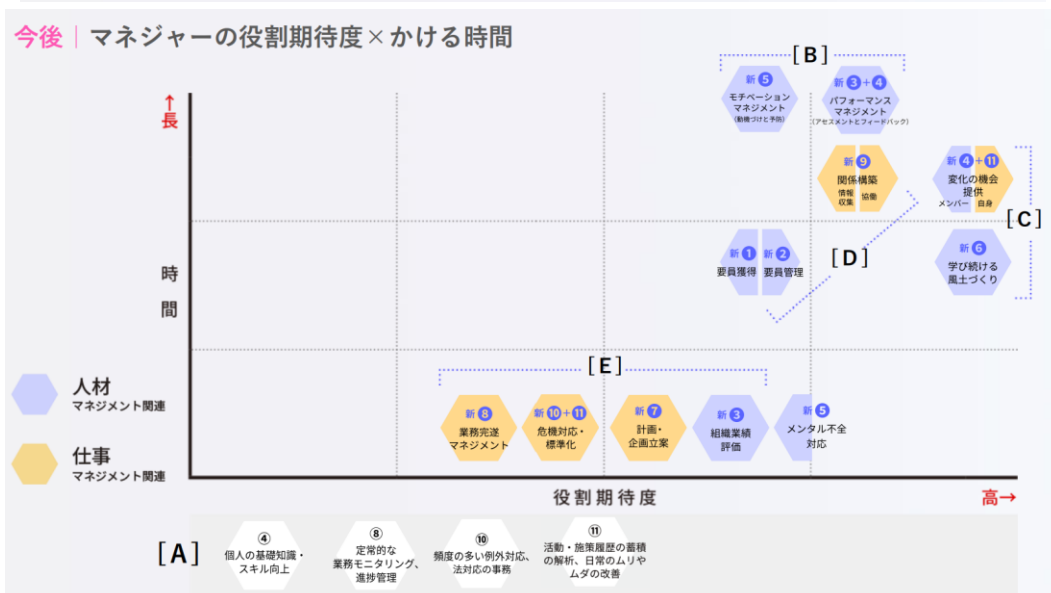
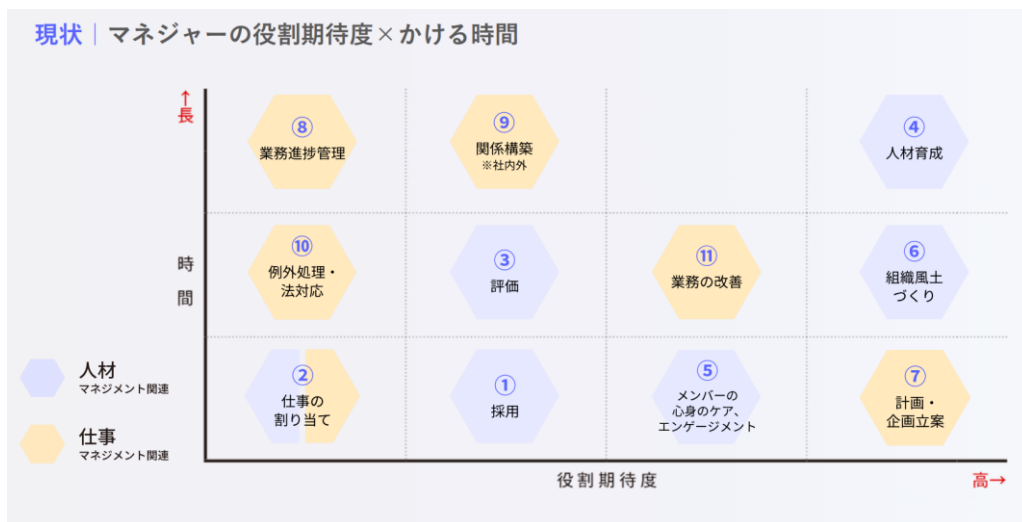
**Google is shifting back to in-person job interviews to combat rising AI-enabled cheating in virtual hiring.** CEO Sundar Pichai supports a hybrid model, citing benefits for both recruiters and candidates. The move follows concerns over tools like Interview Coder, which help applicants cheat during online assessments. Google's VP of recruiting acknowledged the challenge, noting that while virtual interviews are faster, they pose risks. Other companies like Deloitte and Amazon are also reconsidering remote hiring practices amid growing AI misuse. [AI can't ace your interview anymore: Google to bring back in-person hiring | Company News - Business Standard](#)<sup>10</sup>

# Market Highlights

## September 2025

**GenAI is rapidly transforming the role of managers. Routine tasks such as monitoring progress, reporting, and basic training are increasingly automated, freeing managers to focus on higher-value responsibilities.** This report reveals how AI shifts the manager's role toward performance management, motivation, and building a culture of continuous learning. It also highlights the growing importance of change leadership, relationship-building, and vision-setting. Far from replacing managers, AI redefines their impact—making human-centered skills the true differentiator. Early adopters will gain a decisive advantage in talent engagement and organizational performance. 生成AIが変えるマネジャーの役割と業務<sup>11</sup>

Manager role expectations and time spent: Current & Future



# Market Highlights

## September 2025

### West Japan Expansion

Many hotels, such as Hoshino Resort, Hilton LXR Hotels & Resorts, Royal Hotel, APA Hotel & Resorts, are opening in Hiroshima to attract inbound tourists.

広島でホテル開業続々、ツウな海外客誘引 観光で国内トップ3目指す - 日本経済新聞<sup>12</sup>

Hotte Holdings to leverage Korea's top-tier hotel know-how to expand Japan hotel operations, plans to operate 20 hotels by 2034 in Nagoya, Fukuoka, Sapporo & Sendai, besides the current Tokyo and Myoko, Niigata.

ロッテHD、国内ホテル20カ所に拡大 人材育成など韓国での知見注入 - 日本経済新聞<sup>13</sup>

Taiwanese banks are opening a sub-branch in Osaka due to increasing inbound and events like Expo and IR, as well as real estate investments.

- First Commercial Bank, a Taiwanese bank, has a Tokyo branch and just opened an Osaka sub-branch in August, due to increasing tourism and real estate investments.  
OSAKA SUB-BRANCH - Overseas Presence | First Bank<sup>14</sup>
- AMFC (Asia Money Fintech Company), a Taiwan fintech, has had an Osaka office since 2024.  
<https://amfc.com.tw/jp/><sup>15</sup>
- CHB (Chang Hua Bank/彰化銀行) has had an Osaka sub-branch since 2024.  
Chang Hwa Bank<sup>16</sup>

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