

Monthly Market Update

September 2026

Trend Summary

- **AI is changing hiring, not simply reducing jobs** — Japan's labour shortages continue to support hiring, while AI is changing the skills, roles, and candidate profiles that companies need.
- **AI is changing how companies recruit** — Sourcing, screening and assessment are increasingly being automated, reshaping recruitment processes.
- **Recruitment may shift toward higher-value talent advice** — As AI automates routine hiring activities, workforce planning, skills strategy and labour-market intelligence may become increasingly important.

Highlights Overview

Market Data

1. HRog reports: full-time job, monthly salary of 297,655 yen, temp hourly wage of 1,610 yen.
2. Persol DODA job-to-applicant ratio was 2.71, +0.16 pt MoM.
3. The latest MHLW job-to-applicant ratio is 1.18, Tokyo 1.69 & Osaka 1.12, full-time 1.00.
4. Association of Job Information of Japan reports that job ads in July totalled 2,609,906, +2.9% up from the previous month and up 15.8% YoY.

Market Trend

1. From Candidate Delivery to Talent Intelligence: How AI Is Reshaping Recruitment in Japan
2. As recruitment execution becomes more automated, competitive differentiation may move beyond candidate delivery toward talent intelligence and strategic advisory services.
3. Key implication for recruitment: AI appears more likely to reshape hiring demand than reduce it outright in Japan.

West Japan Expansion

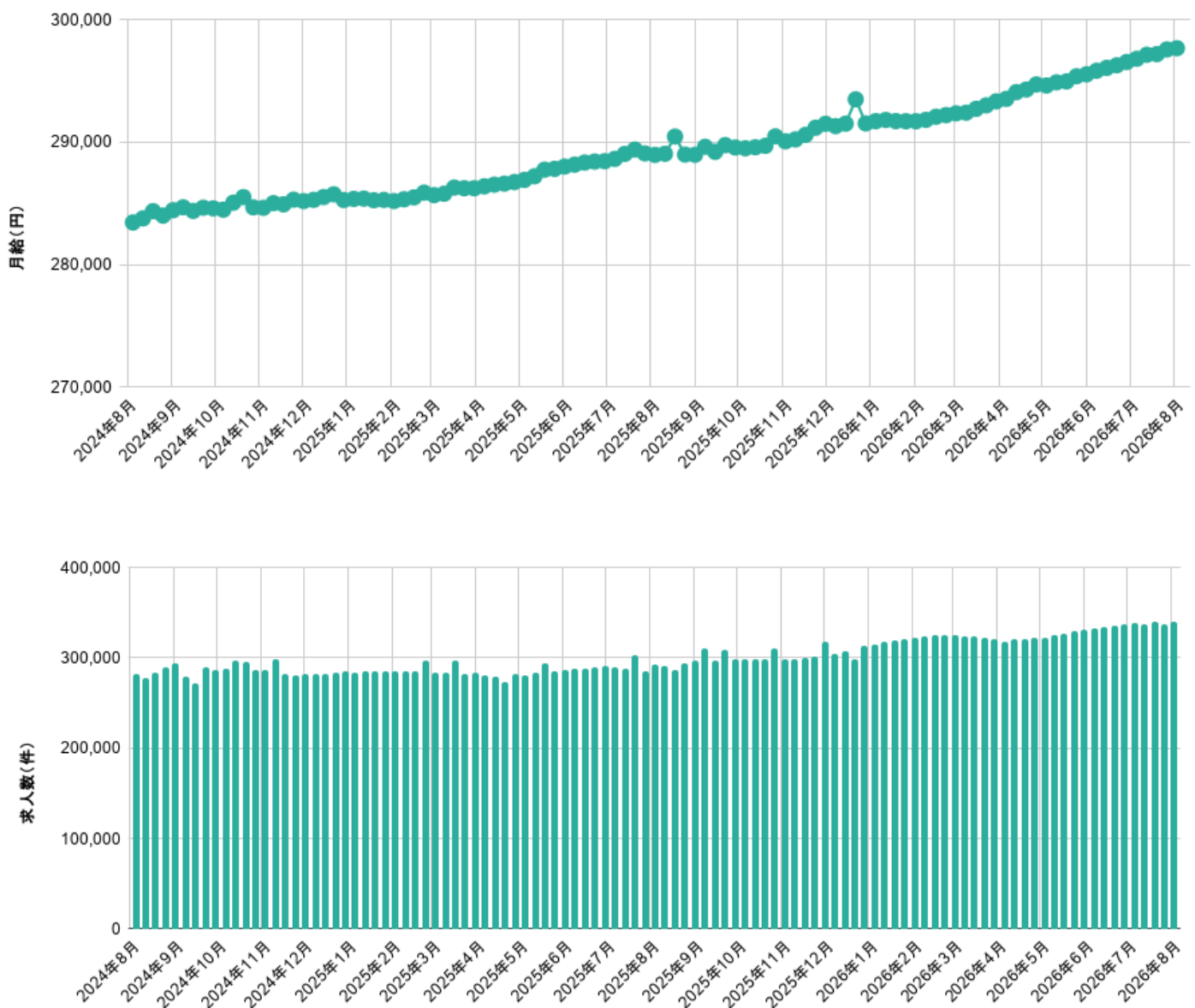
1. Tesla opened new delivery centres in Kobe and Yokohama.
2. Hilton will launch Japan's first Motto by Hilton in Kyoto's Shijo-Karasuma district in 2029, targeting urban lifestyle travellers.
3. IHG signed a major Kyoto portfolio deal to rebrand 14 hotels (1,063 rooms) under Garner and Holiday Inn Express brands.
4. Fintech: Osaka Prefecture will fund four fintech pilots.

Market Highlights

September 2026

Market Data

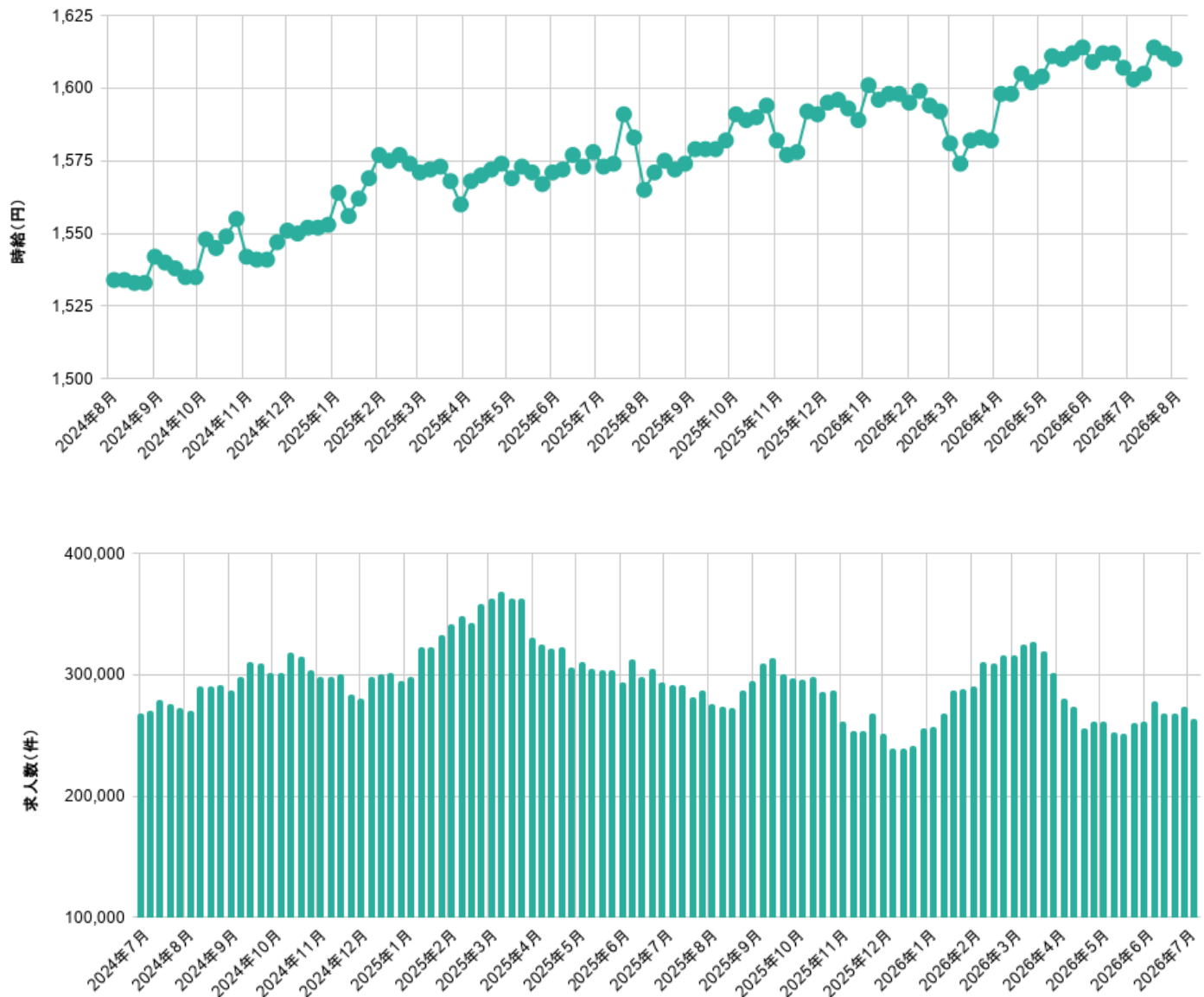
HRog (HRog Co., Ltd.) reports the August 2026 full-time employee average salary & vacancies. Average salary is 297,655 yen, +0.29% (+862 yen) MoM, +3.01% (+8,704 yen) YoY, with 339,748 vacancies which is +0.32% (+1,092 jobs) MoM/ +16.25% (+47,480 jobs) YoY.



Market Highlights

September 2026

HRog reports the August 2026 temp hourly wage & vacancies. The average hourly wage is 1,610 yen, up 0.44% (+7 yen) MoM and 2.88% (+45 yen) YoY, with 281,326 vacancies, up 6.71% (+17,679 jobs) MoM and 2.03% (+5,591 jobs) YoY.



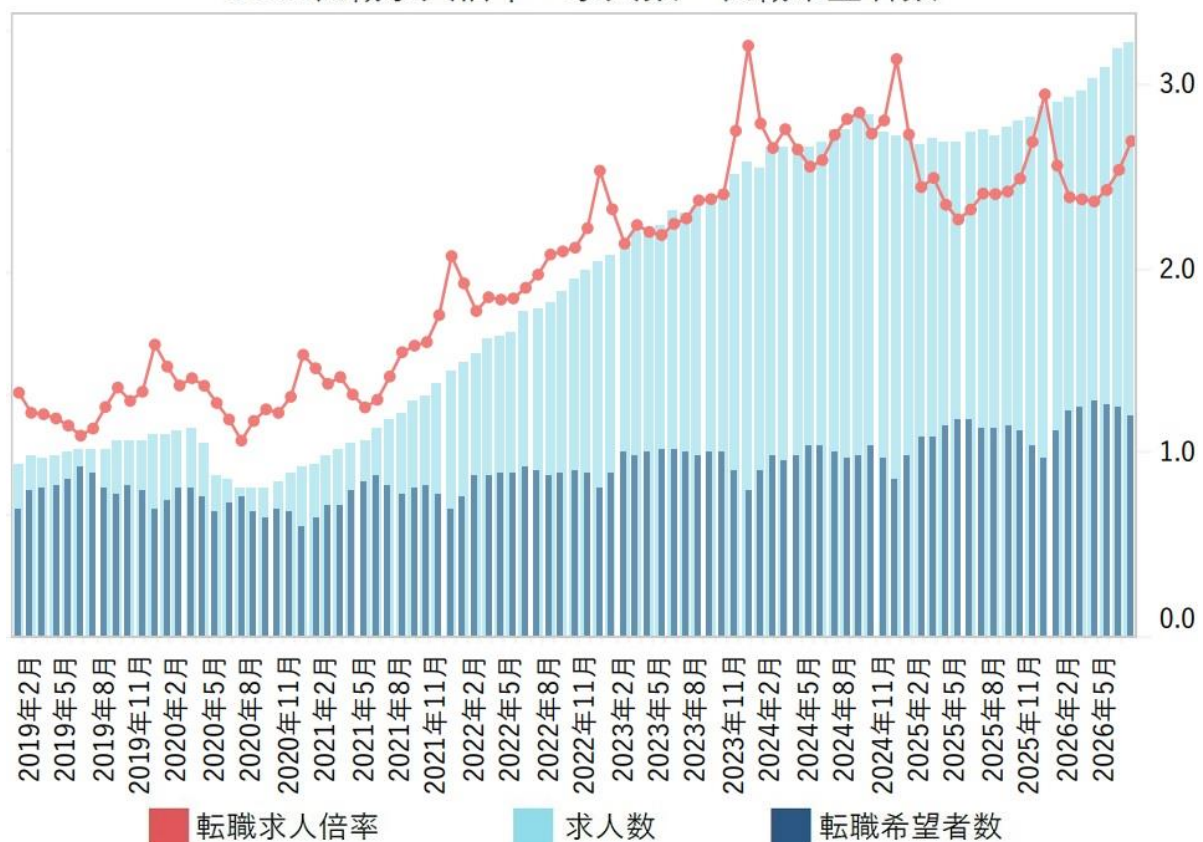
Market Highlights

September 2026

Persol DODA reports the July mid-career job-to-applicant ratio was 2.71 (+0.16 pt MoM/+0.29pt YoY), the highest in seven months, as job openings increased and job-seeking activity slowed during the summer holiday period. Vacancies rose 0.9% MoM (+17.2% YoY), while job seekers fell 5.0% MoM but remained up 4.8% YoY. Demand was especially strong in energy and trading companies, while median full-time monthly pay rose 2.5% YoY. Wage growth was particularly strong for AI engineers, highlighting a growing premium for AI-related skills.

中途求人倍率7月は2.71倍 7カ月ぶり高水準、商社の引き合い強い - 日本経済新聞³

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 2026

	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	2.71	↑ 0.16	↑ 0.29	100.9%	95.0%
IT・通信	7.06	↑ 0.23	↑ 0.78	101.1%	97.8%
メディア	3.70	↑ 0.06	↑ 0.38	99.1%	97.5%
金融	2.59	↑ 0.12	↓ -0.05	101.3%	96.6%
メディカル	0.90	↑ 0.03	↓ -0.08	98.5%	95.0%
メーカー	3.20	↑ 0.23	↑ 0.31	101.0%	93.8%
商社	1.82	↑ 0.11	↑ 0.26	102.0%	95.7%
小売・流通	0.79	↑ 0.05	↑ 0.12	101.1%	94.6%
レジャー・外食	0.81	↑ 0.06	↑ 0.03	100.8%	93.4%
エネルギー	2.36	↑ 0.18	↓ -0.29	103.8%	95.8%
建設・不動産	5.33	↑ 0.28	↑ 0.43	101.3%	96.0%
コンサルティング	9.30	↑ 0.35	↑ 1.38	100.4%	96.7%
人材サービス	10.14	↑ 0.48	↑ 2.48	101.4%	96.6%
その他	0.25	↑ 0.01	- 0.00	96.7%	93.9%

	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	2.71	↑ 0.16	↑ 0.29	100.9%	95.0%
営業	3.04	↑ 0.18	↑ 0.35	101.6%	95.5%
企画・管理	3.14	↑ 0.09	↓ -0.07	100.6%	97.7%
エンジニア（IT・通信）	11.26	↑ 0.21	↑ 0.70	99.4%	97.6%
エンジニア（機械・電気）	6.40	↑ 0.38	↑ 1.03	100.8%	94.9%
専門職（メディカル）	0.54	↑ 0.03	↓ -0.11	101.0%	95.2%
専門職（化学・食品）	1.70	↑ 0.17	↑ 0.24	104.9%	94.4%
専門職（建設・不動産）	5.67	↑ 0.37	↑ 0.26	100.8%	94.3%
専門職（コンサル・金融）	6.01	↑ 0.33	↑ 0.15	102.7%	97.1%
クリエイター	1.18	↑ 0.03	↑ 0.12	100.3%	97.4%
販売・サービス	0.79	↑ 0.06	↑ 0.08	101.1%	93.8%
事務・アシスタント	0.58	↑ 0.06	↑ 0.17	105.1%	95.0%
その他	0.06	- 0.00	↑ 0.02	98.7%	91.1%

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 2026

LATEST MHLW JOB-TO-APPLICANT RATIO - AS OF JULY 2026

1.18
0.00 MoM

**Total
National
average**

1.00
0.00 MoM

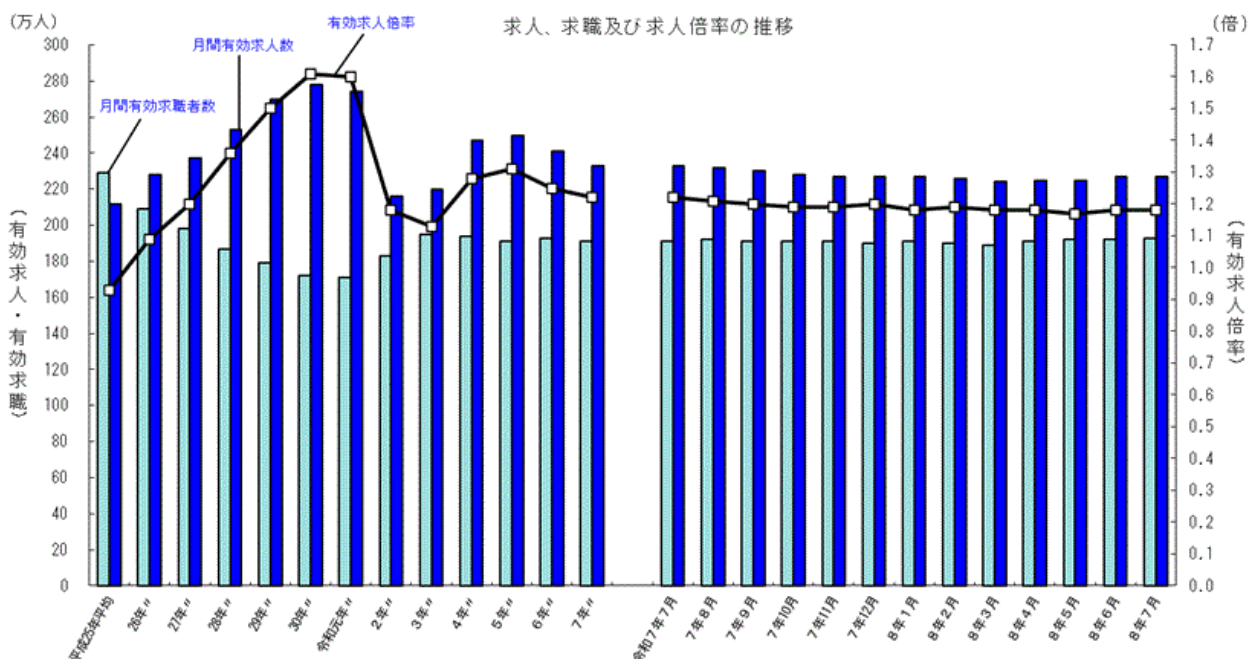
Full time

1.69
-0.01 MoM

Tokyo

1.12
-0.01 MoM

Osaka



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 2026

全国計

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

常用（除パート）

8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	487,600	1,334,953	226,996	1,154,397	183,123	41,437	2.15	1.16
管理的職業従事者	1,752	5,093	1,043	5,341	915	93	1.68	0.95
専門的・技術的職業従事者	123,909	346,806	36,506	187,853	27,187	6,594	3.39	1.85
製造技術者（開発）	5,306	15,051	1,156	6,462	970	145	4.59	2.33
製造技術者（開発を除く）	4,155	11,599	2,732	13,110	1,122	228	1.52	0.88
建築・土木・測量技術者	20,621	58,746	1,849	8,836	1,973	446	11.15	6.65
情報処理・通信技術者	18,635	51,741	5,726	34,555	6,451	332	3.25	1.50
その他の技術者	1,138	5,435	320	1,596	432	89	3.56	3.41
医師、歯科医師、獣医師、薬剤師	1,956	5,597	533	2,298	171	53	3.67	2.44
保健師、助産師、看護師	23,290	62,483	6,789	27,933	4,155	1,938	3.43	2.24
医療技術者	10,630	28,645	2,127	9,247	1,083	471	5.00	3.10
その他の保健医療従事者	4,841	14,246	1,468	7,911	793	297	3.30	1.80
社会福祉専門職業従事者	27,113	75,849	5,704	28,139	5,444	2,118	4.75	2.70
美術家、デザイナー、写真家、映像撮影者	1,020	2,803	2,921	20,648	1,715	109	0.35	0.14
その他の専門的職業	5,204	14,611	5,181	27,118	2,878	368	1.00	0.54
事務従事者	44,924	117,612	58,300	316,027	70,928	9,096	0.77	0.37
一般事務従事者	28,467	73,923	47,271	259,538	50,733	6,494	0.60	0.28
会計事務従事者	4,495	12,139	4,783	23,389	7,858	910	0.94	0.52
生産関連事務従事者	4,254	11,325	1,554	7,638	3,394	576	2.74	1.48
営業・販売事務従事者	4,906	12,956	3,114	14,826	7,210	816	1.58	0.87
外勤事務従事者	211	467	25	115	111	22	8.44	4.06
運輸・郵便事務従事者	1,817	4,834	381	1,791	773	154	4.77	2.70
事務用機器操作員	774	1,968	1,172	8,730	849	124	0.66	0.23
販売従事者	47,529	130,551	12,811	63,534	11,500	1,935	3.71	2.05
商品販売従事者	21,195	56,610	5,692	29,577	3,733	853	3.72	1.91
販売類似職業従事者	1,053	2,843	282	1,627	242	50	3.73	1.75
営業職業従事者	25,281	71,098	6,837	32,330	7,525	1,032	3.70	2.20
サービス職業従事者	78,864	220,618	20,280	95,279	16,440	5,798	3.89	2.32
家庭生活支援サービス職業従事者	80	172	35	177	20	5	2.29	0.97
介護サービス職業従事者	38,184	105,808	6,763	30,528	5,686	2,666	5.65	3.47
保健医療サービス職業従事者	5,002	13,455	1,154	4,773	1,989	724	4.33	2.82
生活衛生サービス職業従事者	7,099	19,668	1,230	6,584	483	182	5.77	2.99
飲食物調理従事者	14,355	39,416	4,570	21,539	3,201	1,168	3.14	1.83
接客・給仕職業従事者	9,079	28,919	3,669	17,727	2,354	503	2.47	1.63
居住施設・ビル等管理人	996	2,338	1,074	4,857	1,316	172	0.93	0.48
その他のサービス職業従事者	4,069	10,842	1,785	9,094	1,391	378	2.28	1.19
保安職業従事者	23,289	57,154	1,957	8,649	3,574	1,206	11.90	6.61
農林漁業従事者	3,513	9,632	1,797	8,971	1,231	568	1.95	1.07
生産工程従事者	60,723	164,638	19,808	94,061	22,331	6,769	3.07	1.75
生産設備制御・監視従事者（金属製品）	1,545	4,032	838	3,522	541	169	1.84	1.14
生産設備制御・監視従事者（金属製品を除く）	2,802	6,803	686	3,026	1,149	302	4.08	2.25
機械組立設備制御・監視従事者	752	2,303	412	1,944	294	68	1.83	1.18
製品製造・加工処理従事者（金属製品）	13,457	36,963	3,483	15,659	4,383	1,372	3.86	2.36
製品製造・加工処理従事者（金属製品を除く）	14,447	38,274	4,954	23,698	7,911	2,465	2.92	1.62
機械組立従事者	7,078	18,937	4,094	19,609	2,787	920	1.73	0.97
機械整備・修理従事者	12,707	36,164	1,745	8,332	1,970	600	7.28	4.34
製品検査従事者（金属製品）	1,178	2,983	535	2,249	618	166	2.20	1.33
製品検査従事者（金属製品を除く）	1,370	3,621	451	1,972	812	248	3.04	1.84
機械検査従事者	1,108	2,802	340	1,657	486	111	3.26	1.69
生産関連・生産類似作業従事者	4,279	11,756	2,270	12,393	1,380	348	1.89	0.95
輸送・機械運転従事者	37,365	100,698	10,603	44,551	10,801	3,741	3.52	2.26
鉄道運転従事者	33	128	24	134	13	1	1.38	0.96
自動車運転従事者	29,282	78,661	7,164	28,428	7,960	2,991	4.09	2.77
船舶・航空機運転従事者	13	80	32	135	13	1	0.41	0.59
その他の輸送従事者	2,161	5,587	1,624	7,267	980	267	1.33	0.77
定置・建設機械運転従事者	5,876	16,242	1,759	8,587	1,835	481	3.34	1.89
建設・採掘従事者	40,093	113,065	4,256	19,996	4,110	1,780	9.42	5.65
建設躯体工事従事者	6,694	19,054	492	2,210	418	229	13.61	8.62
建設従事者（建設躯体工事従事者を除く）	10,691	29,976	1,427	6,137	1,200	443	7.49	4.88
電気工事従事者	7,564	21,456	1,046	5,806	967	352	7.23	3.70
土木作業従事者	15,051	42,306	1,273	5,776	1,497	748	11.82	7.32
採掘従事者	93	273	18	67	28	8	5.17	4.07
運搬・清掃・包装等従事者	25,639	69,086	17,486	100,946	14,106	3,857	1.47	0.68
運搬従事者	14,412	39,165	7,987	37,588	7,604	1,944	1.80	1.04
清掃従事者	5,204	13,493	2,330	14,616	2,880	874	2.23	0.92
包装従事者	1,121	2,882	501	2,815	737	224	2.24	1.02
その他の運搬・清掃・包装等従事者	4,902	13,546	6,668	45,927	2,885	815	0.74	0.29
分類不能の職業	-	-	42,149	209,189	-	-	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。

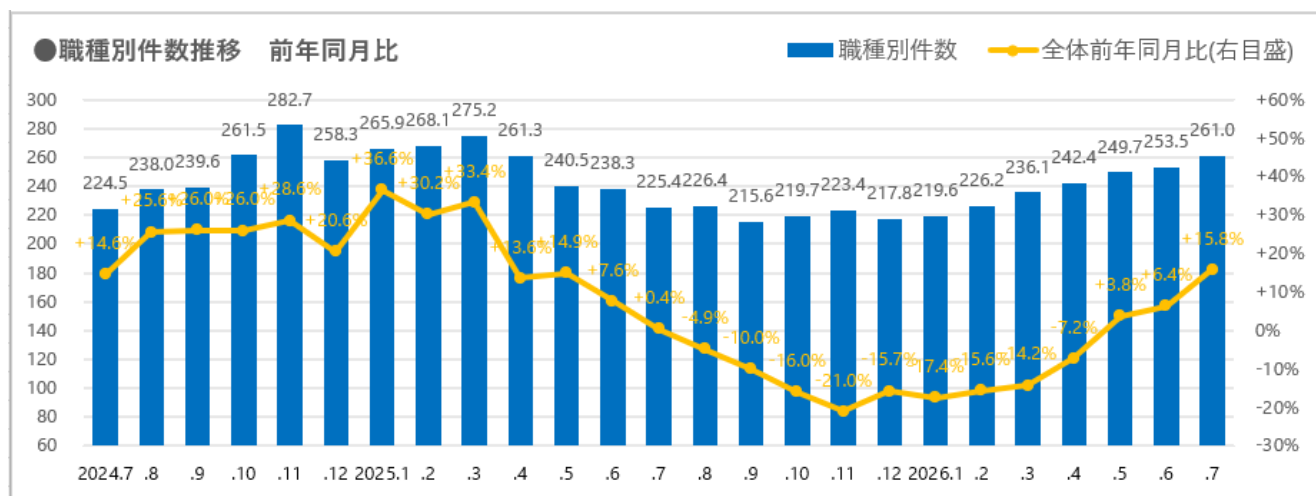
Market Highlights

September 2026

Japan's labour market remained resilient in July 2026. The July job-to-applicant ratio held steady at 1.18, while the unemployment rate improved to 2.4%. Strong demand from AI and semiconductor-related industries boosted manufacturing hiring, offsetting DX-driven job reductions. New job postings declined slightly YoY, with hospitality weakest and manufacturing strongest.

7月の有効求人倍率1.18倍、前月と横ばい 完全失業率は2.4% - 日本経済新聞⁶

Zenkyukyo (the Association of Job Information of Japan) reports that July job ads totalled 2,609,906 (+2.9% MoM, +15.8% YoY). IT specialist roles showed the strongest growth, followed by construction/mining. The steepest declines were among childcare/teaching and cooking service roles, while administrative jobs also fell significantly YoY.



●職種別件数（占有率TOP10）

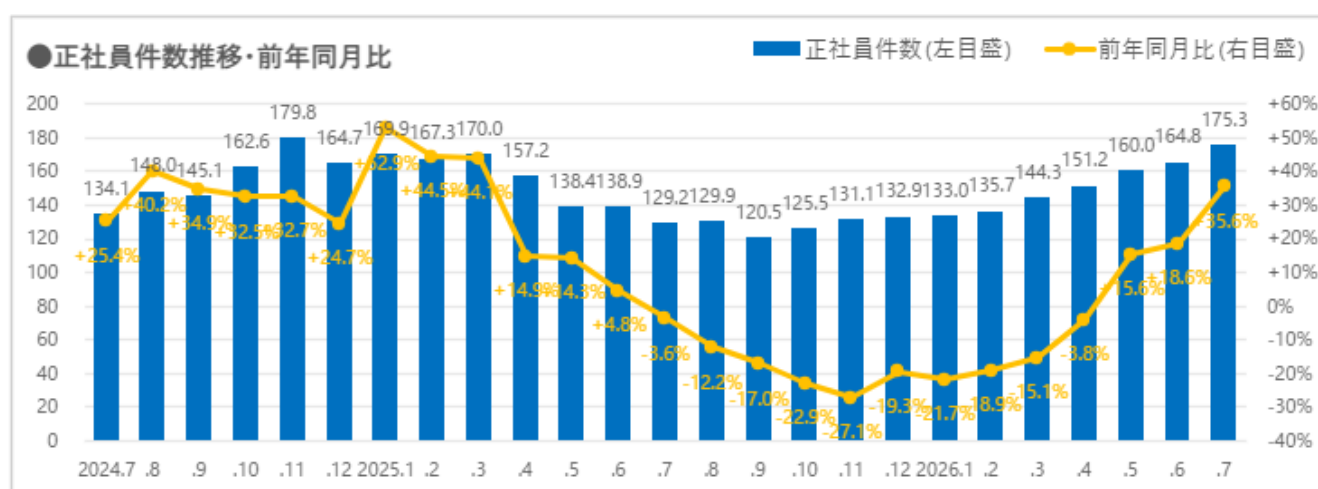
	件数	前月比	前年同月比
全体計	2,609,906	+2.9%	+15.8%
専門（IT技術者）	686,472	+13.1%	+206.6%
販売（販売）	267,475	+0.5%	+5.4%
事務	217,946	-0.2%	-25.2%
輸送・機械運転	201,925	+3.3%	+6.7%
販売（営業）	157,883	+0.2%	+2.2%
建設・採掘	146,437	+10.6%	+25.1%
サービス（給仕）	127,299	-5.7%	-4.7%
運搬・清掃・包装等	126,281	-0.3%	-7.0%
生産工程	115,528	+1.7%	-2.2%
専門（医療・福祉専門職）	102,919	-1.6%	+6.1%

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

Market Highlights

September 2026

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	1,752,699	+6.4%	+35.6%
専門（IT技術者）	678,043	+13.4%	+219.9%
事務	158,836	-0.0%	-30.1%
輸送・機械運転	154,867	+4.7%	+9.3%
販売（営業）	141,348	+0.4%	+4.3%
建設・採掘	130,728	+12.3%	+33.9%
販売（販売）	116,127	+1.4%	+19.2%
専門（技術者・研究者）	69,979	+3.9%	-21.9%
専門（医療・福祉専門職）	57,710	-2.1%	+10.6%
生産工程	57,174	+5.8%	-3.9%
サービス（給仕）	39,439	-3.2%	+13.0%

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

調査発表/求人広告掲載件数 – 全国求人情報協会 (zenkyukyo.or.jp)⁷

Market Highlights

September 2026

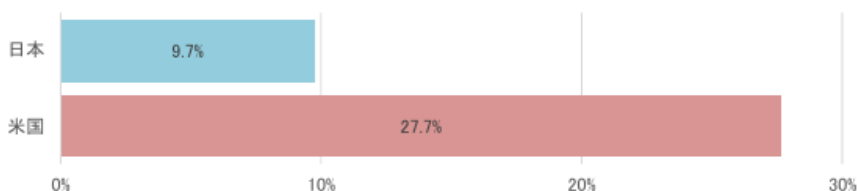
Market trend

From Candidate Delivery to Talent Intelligence: How AI Is Reshaping Recruitment in Japan.

Japan's AI hiring story is currently less about fewer jobs and more about different jobs, different skills and different ways of hiring. Labour shortages continue to underpin demand for talent, while AI is increasingly changing job content, skill requirements and recruitment processes. Current evidence suggests that, in Japan, the labour-market impact of AI is appearing more clearly in changing skills and job requirements than in broad-based reductions in hiring.

The gap in AI maturity between Japan and the US remains significant. A recent survey by Indeed Recruit Partners found that only 9.7% of Japanese companies qualify as "AI-advanced," compared with 27.7% of US companies.

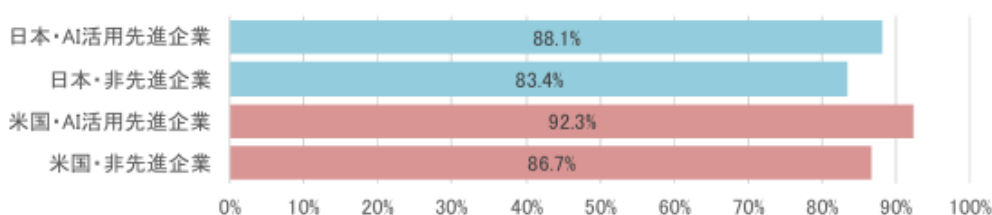
AI活用先進企業の割合



Despite this disparity, more than 80% of employers in both markets reported maintaining or increasing hiring levels since 2023. In Japan, labour shortages remain a major driver of changes in hiring targets, while AI is increasingly influencing the skills and candidate profiles companies seek. The shift is particularly pronounced among AI-advanced companies: 90% of Japanese AI-advanced companies reported changing their hiring targets, compared with 46.2% of non-advanced companies.

新卒・ジュニア層（経験年数3年程度まで）の採用数の変化

※2023年以降の採用数に関する設問で「増えた」「変わらない」という回答の合計が全体に占める割合



Market Highlights

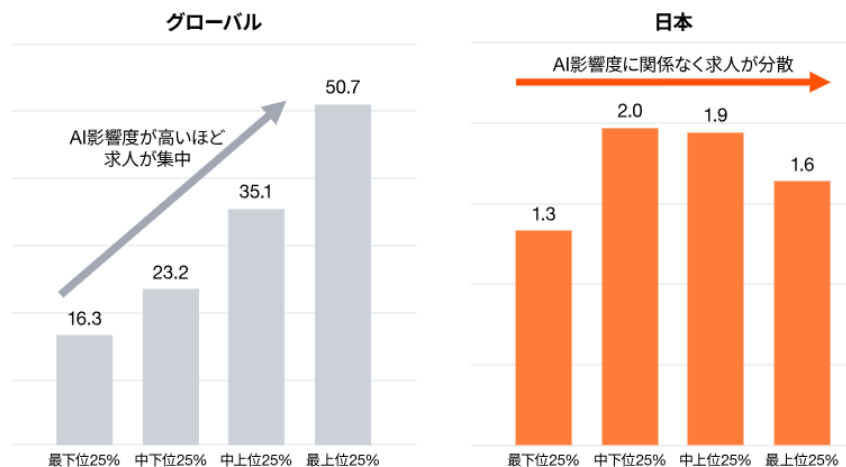
September 2026

PwC's latest analysis of approximately 11.2 million Japanese job postings provides further evidence of this shift. Japanese job postings are relatively evenly distributed across occupations with different levels of AI exposure, rather than being concentrated in highly AI-exposed occupations. However, skills are changing significantly faster in highly AI-exposed occupations, with the pace of change more than twice that of less-exposed occupations. This suggests that, in Japan, AI is currently reshaping jobs and skill requirements before fundamentally reshaping the overall distribution of hiring demand.

PwC Japan 2026 AI Jobs Barometer⁹

グローバルではAI影響度上位ほど求人が多い一方、日本では全区分でほぼ均等に分布

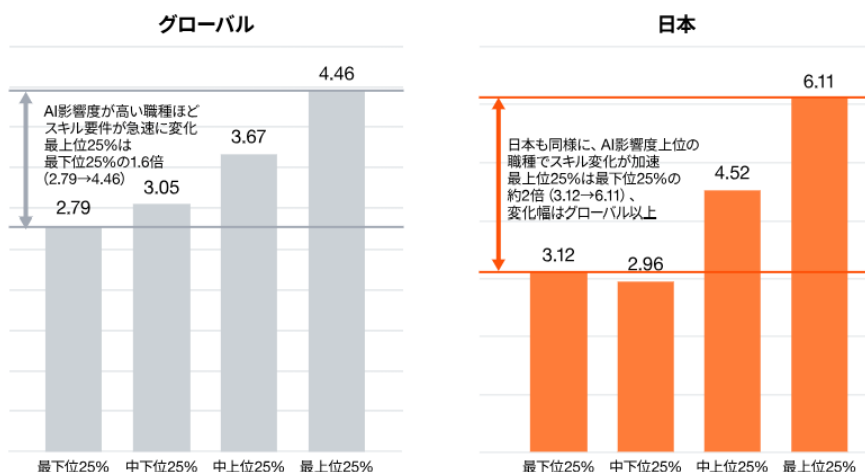
AI影響度四分位区分別の求人情数（2025年、単位：百万件）



注：AI影響度はLightcastスコアに基づき四分位区分 縦軸スケールはグラフ別に最適化
出所：PwCによる分析、Lightcastデータ

求人数は非連動でも、「求められるスキル」は既に変わり始めている：
グローバル・日本ともにAI影響度が高い職種で変化が加速

AI影響度四分位区分別のスキル変化量（2023年～2025年）



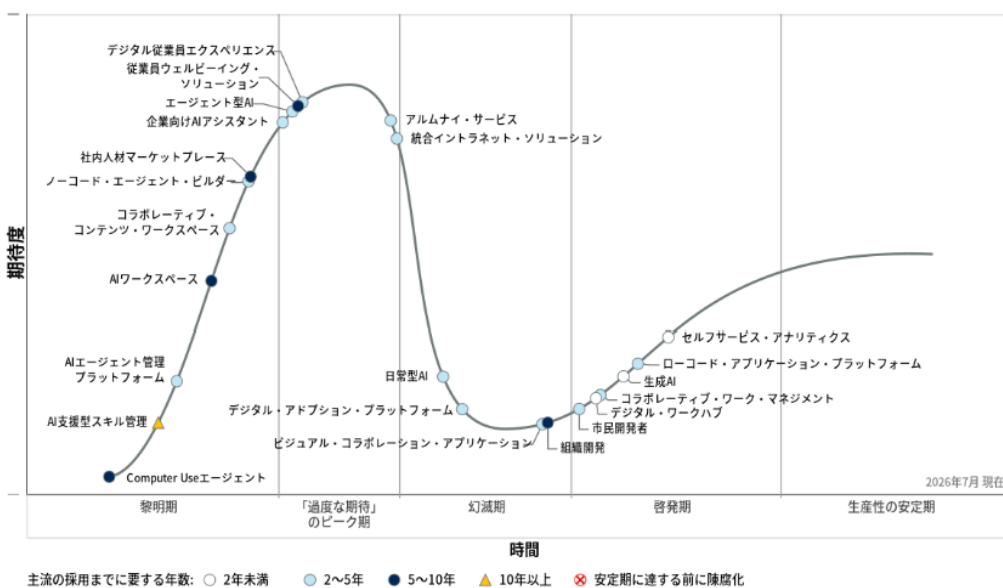
注：AI影響度はLightcastスコアに基づき四分位区分 縦軸スケールはグラフ別に最適化
出所：PwCによる分析、Lightcastデータ

Market Highlights

September 2026

At the same time, AI is beginning to automate parts of the recruitment process itself. AI-enabled recruitment platforms such as [Paradox](#), [HireVue](#), [Eightfold AI](#) and [Mercor](#) are developing increasingly automated approaches to sourcing, screening, scheduling and initial assessment. In Japan, Gartner identifies agentic AI as a major emerging workplace technology, although adoption remains at an early stage and questions around governance, human-AI collaboration and organisational readiness remain important.

日本における未来のデジタル・ワークスペースのハイプ・サイクル：2026年



Gartner

出典：Gartner (2026年8月)

Gartner Japan – Future Digital Workplace Hype Cycle 2026¹⁰

This shift could increasingly redefine where recruitment firms create value. As recruitment execution becomes more automated, competitive differentiation may move beyond candidate delivery toward talent intelligence and strategic advisory services. Workforce planning, skills strategy, organisational design, leadership assessment, succession planning and labour-market intelligence could become increasingly important as clients seek to understand not only who to hire, but which capabilities they need to build as AI changes the nature of work.

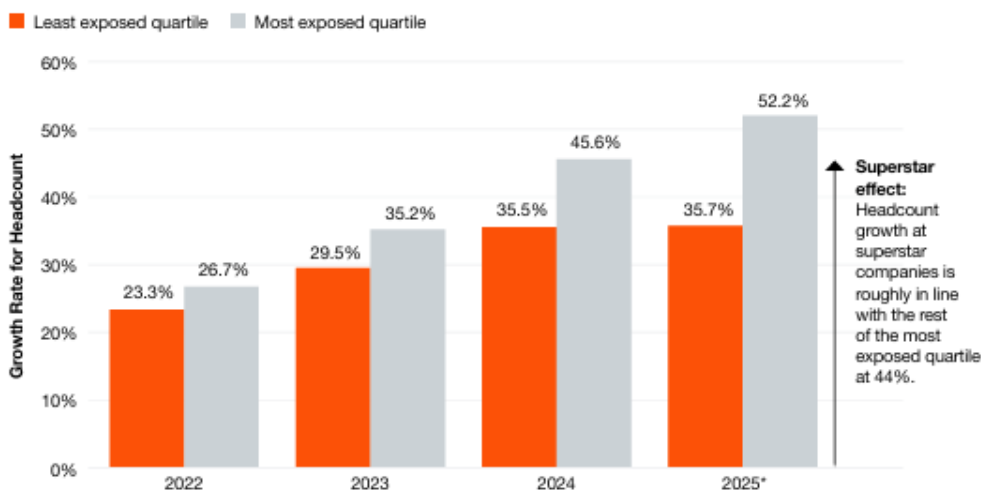
Recent global research reinforces this direction. PwC's 2026 Global AI Jobs Barometer found that companies with greater AI exposure have experienced faster headcount growth than less-exposed peers, suggesting that AI adoption is not inherently associated with workforce reduction. The research also found that AI-exposed roles are undergoing faster skills change, while human-intensive capabilities such as judgement, creativity, empathy and leadership remain important.

Market Highlights

September 2026

Perhaps surprisingly, headcount growth at the most AI-exposed companies is outpacing that at the least AI-exposed companies

Average firm growth rate in headcount by AI exposure quartile (measured using a 2018 baseline)



Source: PwC analysis, ORBIS data

Notes: * 2025 is data used for companies where available, we substitute missing coverage with 2024 data. ORBIS company data is not intended to represent economy-wide employment growth. The analysis is based on larger formal firms with available financial and headcount data in both 2018 and 2024/25, including an initial filter for companies with annual turnover of at least \$50m USD; firms that exited the market during the period are excluded, creating a survivorship bias. In some countries, financial reporting requirements also vary, meaning firms with consistent reported data may be larger, more formalised or better-performing than the wider business population. The key interpretation is therefore the **relative difference** in headcount growth between more and less AI-exposed companies, rather than the absolute growth rate compared with the broader economy.

PwC 2026 Global AI Jobs Barometer¹¹

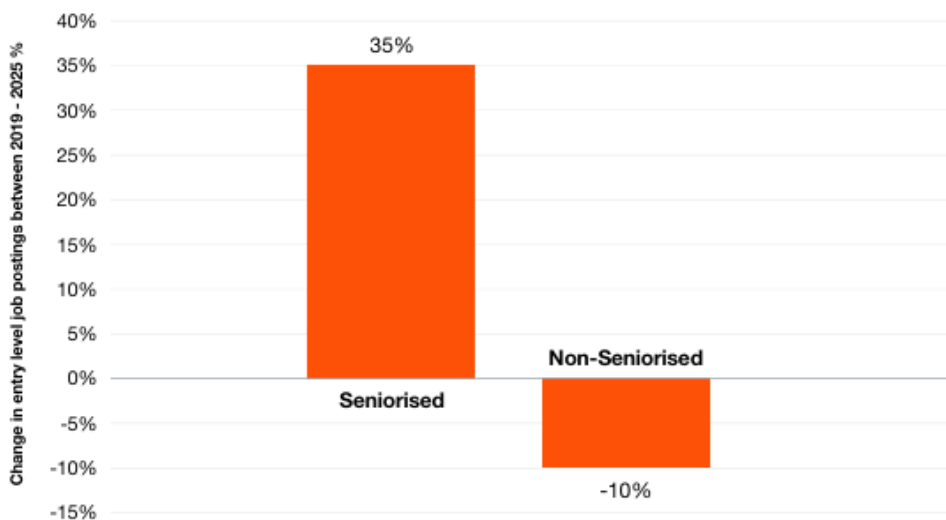
However, AI adoption also presents a longer-term workforce challenge. As AI changes entry-level work, some traditionally junior tasks may disappear or become more demanding. Globally, PwC finds that AI-exposed entry-level roles are seven times more likely to require traditionally senior skills such as strategic decision-making, leadership and team-building. Companies may therefore need to rethink how early-career talent develops these capabilities and how they build sustainable talent pipelines.

Market Highlights

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AI-exposed entry level roles have very different job growth outcomes depending on whether they are being upskilled to demand more traditionally senior abilities

Change in entry-level job postings between 2019 and 2025, seniorised vs non-seniorised roles, top AI exposure quartile, US



Source: PwC analysis, Lightcast data

Notes: (1) An entry-level job posting is classified as "seniorised" if it contains ≥10 mentions of a skill that is both new and traditionally senior. A skill is defined as new for a given occupation if it has >10 mentions in entry-level postings in 2025 but ≤5 mentions in entry-level postings for the same occupation in 2019. A skill is defined as traditionally senior if, within the same AI exposure quartile, it had >50 mentions in experienced (non-entry-level) job postings in 2019 and ≤5 mentions in entry-level postings in 2019.

PwC 2026 Global AI Jobs Barometer¹²

Based on current evidence, AI appears more likely to reshape hiring demand than to reduce it outright in Japan. The key questions for employers are increasingly shifting from simply how many people to hire toward which capabilities to build, which roles to redesign, and which skills will remain difficult to access. As AI automates more transactional recruitment activities, recruitment firms that can combine specialist candidate access with talent intelligence, workforce insights, and strategic advisory capabilities may be better positioned to capture future growth.

Market Highlights

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West Japan expansion

Tesla opened new delivery centres in Kobe and Yokohama to support surging EV sales, improve delivery efficiency, and offer test drives テスラ、神戸と横浜に納車拠点を新設 最新モデル試乗も - 日本経済新聞¹³

Hilton will launch Japan's first Motto by Hilton in Kyoto's Shijo-Karasuma district in 2029, targeting urban lifestyle travellers. Re-urbanization -再都市化¹⁴

IHG signed a major Kyoto portfolio deal to rebrand 14 hotels (1,063 rooms) under Garner and Holiday Inn Express brands. IHG 京都市内14軒を「ガーナー」等にリブランド¹⁵

Fintech: Osaka Prefecture will fund four fintech pilots, including JPYC/USDC stablecoin payments and blockchain trade processing, to accelerate real-world adoption of digital financial services and strengthen Osaka's position as a fintech hub. Osaka Prefecture to subsidize four projects, including stablecoin payments, with up to ¥10 million each — BigGo Finance¹⁶

Market Highlights

September 2026

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