

Human Resources Business Market in Japan: Key Research Findings 2017

◆ Research Outline

Yano Research Institute has conducted a study on the domestic human resources business market with the following conditions:

1. Research period: From July to September, 2017
2. Research targets: Agencies and companies in temporary staffing service providers (mainly for office works), recruiting firms that handle white-collar-jobs and office works, outplacement agencies, engineer dispatch agencies, sales and marketing staffing service providers, job information service providers, manufacturer dispatch/contract work enterprises, and medical staffing service providers
3. Research methodologies: Face-to-face interviews, mail-in surveys, and literature research

What is human resources business?

Human resources business in this research consists of the following eight categories: Temporary staffing business (for general workers or general employees); recruitment business; re-employment (outplacement) support business; engineer dispatch business; sales and marketing staffing business; job information services; manufacturer dispatch/contract working business; and medical staffing services. However, this report deals with and analyzes three of the eight categories, which are: Temporary staffing business (for general workers or general employees); recruiting (or employment) business; and engineer dispatch business. Note that the figures in “temporary staffing service market” until FY2015 are extracted from “the Sales of Worker Dispatch Business” in “Worker Dispatch Business Report 2015” issued by the Health, Labour and Welfare Ministry.

◆ Key Findings

■ Temporary Staffing Service Market in FY2016 Grew to 4,389.8 Billion Yen, 108.8% of Size of Previous Fiscal Year

The temporary staffing service market in FY2016 attained 4,389.8 billion Yen, 108.8% of the size of the previous fiscal year. Unlike other occupations being in favor of sellers over buyers, staffing of general office workers, which is the main service, has become less than one for the ratio of applicants against the job offers, but the special demands stemming from the Working-Style reforms (i.e., increasing number of enterprises have started using temporary staff aiming to improve lengthening working hours by the regular employees) have driven the market expansion to exceed the results and growth rate of the previous fiscal year. This momentum is likely to continue in FY2017, in which the market size projected to attain 4,740 billion yen, 108.0% of the size of the preceding fiscal year.

■ Recruitment Business Market Size in FY2016 Achieved 230.0 Billion Yen, 109.5% on Y-o-Y Basis, Growth Rate Slightly Slowing Down

The recruitment business market in FY2016 reached 230.0 billion yen, 109.5% of the size of the preceding fiscal year. Expansion in job offering demand and continuously rising unit cost for commission fees have secured a positive growth of the market, but the difficulty in securing

human resources have slightly slowed down the growth rate. Because the recruiting demand has kept being eager in FY2017, the market size of the fiscal year is expected to attain 250 billion yen, 108.7% on year-on-year basis, indicating the growth rate to be similar to that of FY2016.

■ **Engineer Dispatch Business Market in FY2016 Rose to 686.5 Billion Yen, 112.0% on Y-o-Y Basis, Maintaining Double Digit Growth**

Size of the engineer dispatch business market in FY2016 grew to 686.5 billion yen, 112.0% of that of the preceding fiscal year. In spite of the wage standard being high and lack of human resources to assign high-end advanced development processes, increasing demand in the field of IT and software have expanded the range to the middle-class levels, which led the market to keep the double digit growth. Because the market tendency in FY2017 is likely to be similar to that of the previous fiscal year, the market size is expected to attain 770.0 billion yen, 112.2% on year-on-year basis.

◆ **Report Format:**

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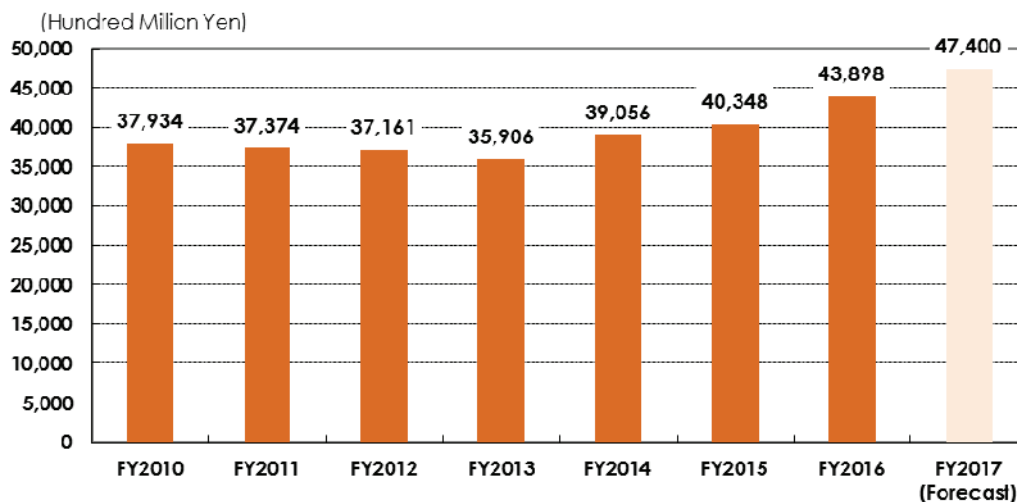
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■ **Figure 1: Transition of Size of Temporary Staffing Service Market**



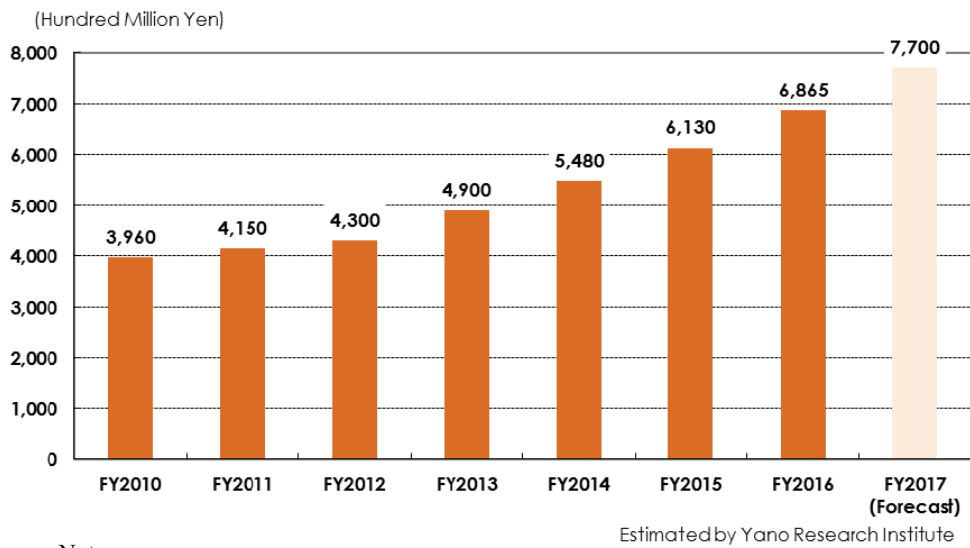
Estimated by Yano Research Institute

Notes:

1. The figures until FY2015 are extracted from “the Sales of Worker Dispatch Business” in “Worker Dispatch Business Report 2015” issued by the Health, Labour and Welfare Ministry, and the figures of FY2016 and beyond are estimated and forecasted by Yano Research Institute.

2. The market size is based on the sales of the businesses.

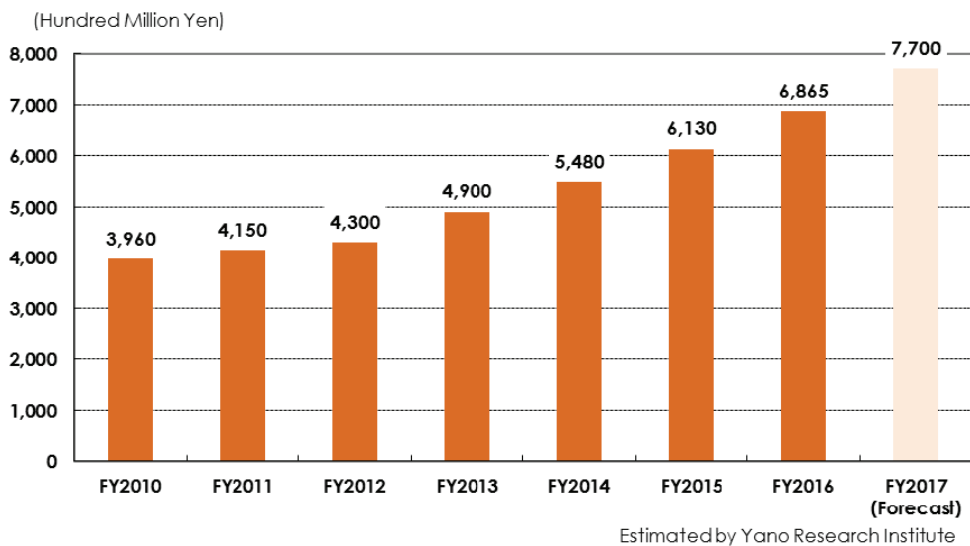
■ **Figure 2: Transition of Size of Recruitment Business Market**



Notes:

3. The market only targets those that handle white-collar jobs.
4. The market size is based on the sales of businesses.

■ **Figure 3: Transition of Size of Engineer Dispatch Business Market**



Notes:

5. The engineer dispatch business market is the market of engineer dispatching services that are categorized in engineer staffing business, but it also includes contract services for designing, developing, and system development by the same businesses.
6. The market size is based on the sales of businesses.