

Summary of the Results

As used in the monthly survey on service industries, the following terms mean as follows:

Service Industries: “Service Industries” cover the 9 industries classified in the following groups designated by the Japan Standard Industrial Classification (Rev. 12, November 2007): “Information and communications,” “Transport and postal activities,” “Real estate and goods rental and leasing,” “Scientific research, professional and technical services,” “Accommodations, eating and drinking services,” “Living-related and personal services and amusement services,” “Education, learning support,” “Medical, health care and welfare” and “Services, n.e.c.” Please refer to the appendix 6 for details of industry coverage.

Persons Working at the Location of Establishment: “Persons Working at the Location of Establishment” mean all persons who are engaged in the business of the establishment and enterprise, etc. at the end of business day of the month, excluding temporarily transferred or dispatched employees to separately operated establishment and enterprise, etc., but including those who work as temporarily transferred or dispatched employees from separately operated establishment and enterprise, etc.

Demand Situation DI: Deduction of ratio of “Decreased” from “Increased.”

* Because the survey was reviewed in January 2013, in the following chart, the adjusted figures of before 2012 were used to calculate in order to make time series comparison possible.

* The figures of its results does not necessarily add up to the adding figures or subtract figures, since the figures are rounded to the unit.

Summary of the Results in 2014

Sales (average per month) 29.40 trillion yen (2.1%)

Number of Persons Working at the Location of Establishment (Annual average) 28.47 million persons (0.9%)

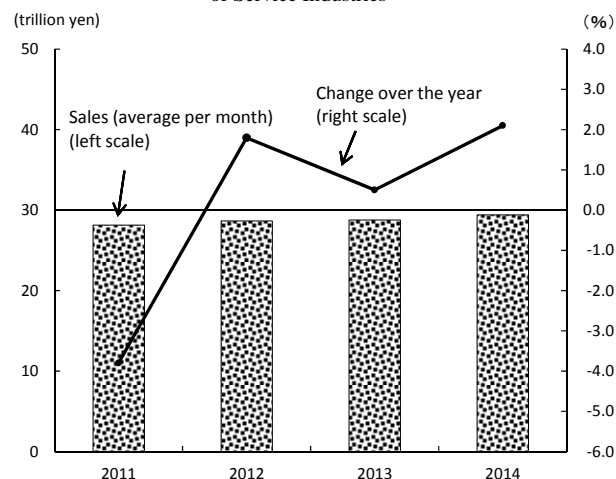
*The figure in parenthesis indicates the percent change over the year.

1 Sales (average per month)

Sales (average per month) of service industries amounted to 29.40 trillion yen in 2014. Compared with the previous year, the sales increased by 2.1% for the third consecutive year.

By industry, the sales increased in 7 industries; “Scientific research, professional and technical

Figure1-1 Change in Sales (average per month) of Service Industries



services” (an increase of 4.6%), “Real estate and goods rental and leasing” (an increase of 3.7%), “Information and communications” (an increase of 3.5%), “Transport and postal activities” (an increase of 3.0%), “Services, n.e.c.” (an increase of 2.2%), “Medical, health care and welfare” (an increase of 1.6%) and “Accommodations, eating and drinking services” (an increase of 0.7%).

On the other hand, the sales decreased in 2 industries; “Education, learning support” (a decrease of 4.3%) and “Living-related and personal services and amusement services” (a decrease of 1.7%).

(Figure 1-1, 1-2, 1-3, Table 1)

Figure 1-2 Sales (average per month) by Industry (Major Groups)

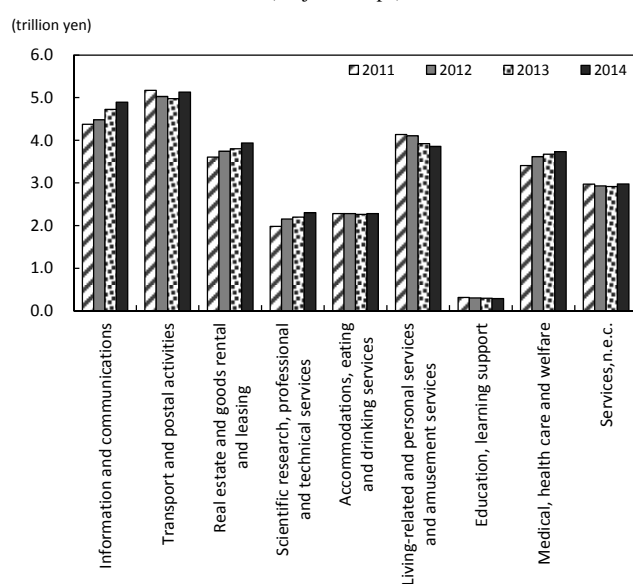


Figure 1-3 Change over the Year of Sales (average per month) by Industry (Major Groups)

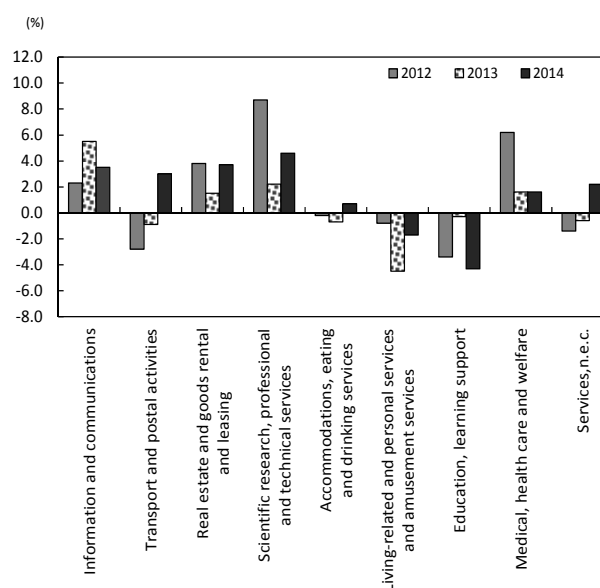


Table 1 Sales (average per month) and Change over the Year by Industry (Major Groups)

| | Actual figures (million yen) | | | | Change over the year (%) | | |
|---|------------------------------|------------|------------|------------|--------------------------|------|------|
| | 2011 | 2012 | 2013 | 2014 | 2012 | 2013 | 2014 |
| Service industry | 28,127,677 | 28,637,495 | 28,781,063 | 29,399,346 | 1.8 | 0.5 | 2.1 |
| Information and communications | 4,379,368 | 4,480,654 | 4,726,926 | 4,894,672 | 2.3 | 5.5 | 3.5 |
| Transport and postal activities | 5,172,851 | 5,027,001 | 4,979,672 | 5,127,790 | -2.8 | -0.9 | 3.0 |
| Real estate and goods rental and leasing | 3,607,691 | 3,743,187 | 3,799,347 | 3,939,521 | 3.8 | 1.5 | 3.7 |
| Scientific research, professional and technical services | 1,981,413 | 2,153,069 | 2,199,795 | 2,301,792 | 8.7 | 2.2 | 4.6 |
| Accommodations, eating and drinking services | 2,283,533 | 2,279,222 | 2,263,466 | 2,279,954 | -0.2 | -0.7 | 0.7 |
| Living-related and personal services and amusement services | 4,139,615 | 4,108,417 | 3,921,939 | 3,854,955 | -0.8 | -4.5 | -1.7 |
| Education, learning support | 311,351 | 300,649 | 299,599 | 286,850 | -3.4 | -0.3 | -4.3 |
| Medical, health care and welfare | 3,408,021 | 3,618,183 | 3,675,388 | 3,735,077 | 6.2 | 1.6 | 1.6 |
| Services, n.e.c. | 2,973,803 | 2,931,458 | 2,914,930 | 2,978,736 | -1.4 | -0.6 | 2.2 |

2 Number of Persons Working at the Location of Establishment (Annual average)

The number of persons working at the location of establishment (annual average) amounted to 28.47 million in 2014. Compared with the previous year, the number of persons working at the location of establishment increased by 0.9% for the second consecutive year.

By industry, the number of persons working at the location of establishment (annual average) increased in 7 industries; “Information and communications” (an increase of 2.5%), “Medical, health care and welfare” (an increase of 1.7%), “Education, learning support” (an increase of 1.4%), “Transport and postal activities,” “Scientific research, professional and technical services,” “Real estate and goods rental and leasing” (an increase of 1.2%) and “Accommodations, eating and drinking services” (an increase of 0.1%).

On the other hand, the number of persons working at the location of establishment (annual average) decreased in 2 industries; “Living-related and personal services and amusement services” (a decrease of 0.4%) and “Services, n.e.c.” (a decrease of 0.1%).

(Figure 2-1, 2-2, 2-3, Table 2)

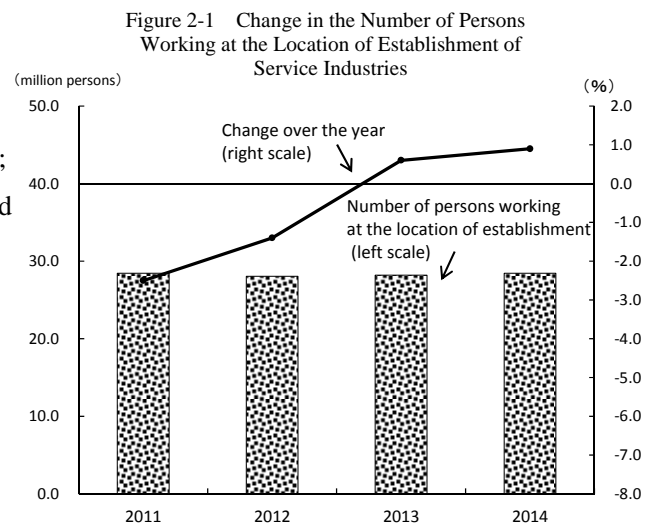


Figure 2-2 The Number of Persons Working at the Location of Establishment by Industry (Major Groups)

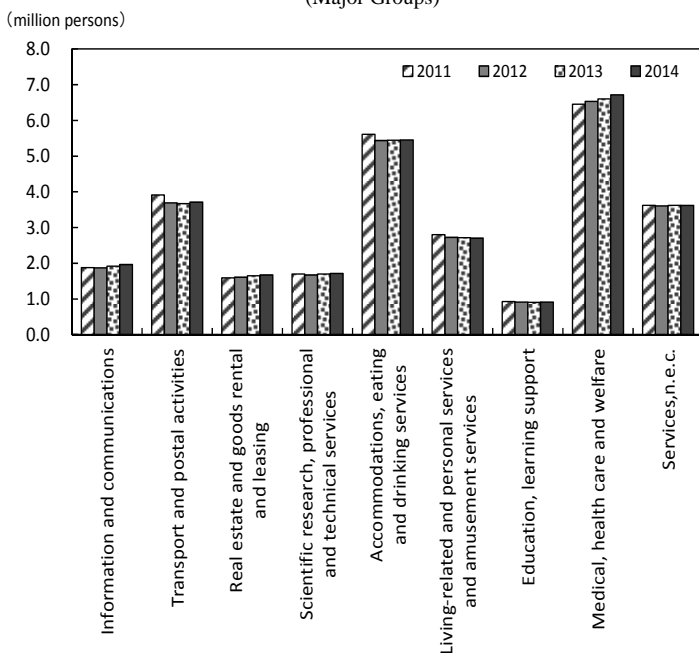


Figure 2-3 Change Over the Year of the Number of Persons Working at the Location of Establishment by Industry (Major Groups)

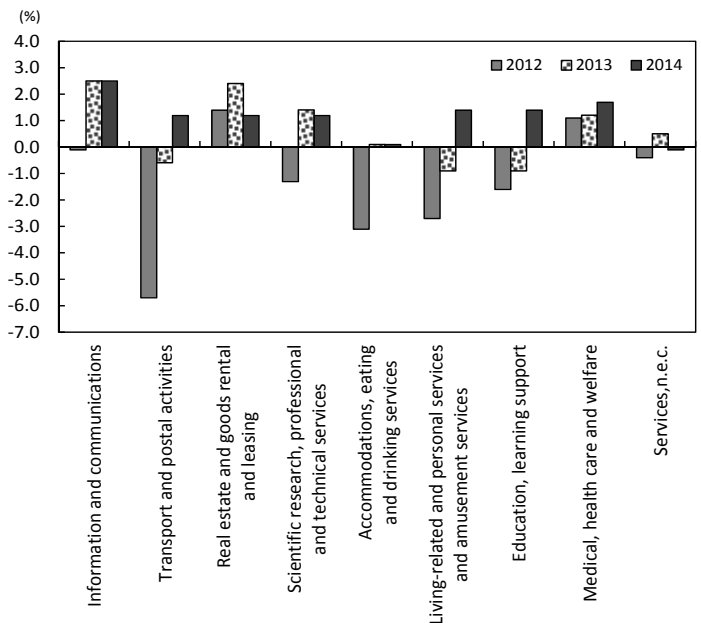


Table 4 Change over the Year and Contribution Ratio of The Number of Persons Working at the Location of Establishment by Industry (Major Groups)

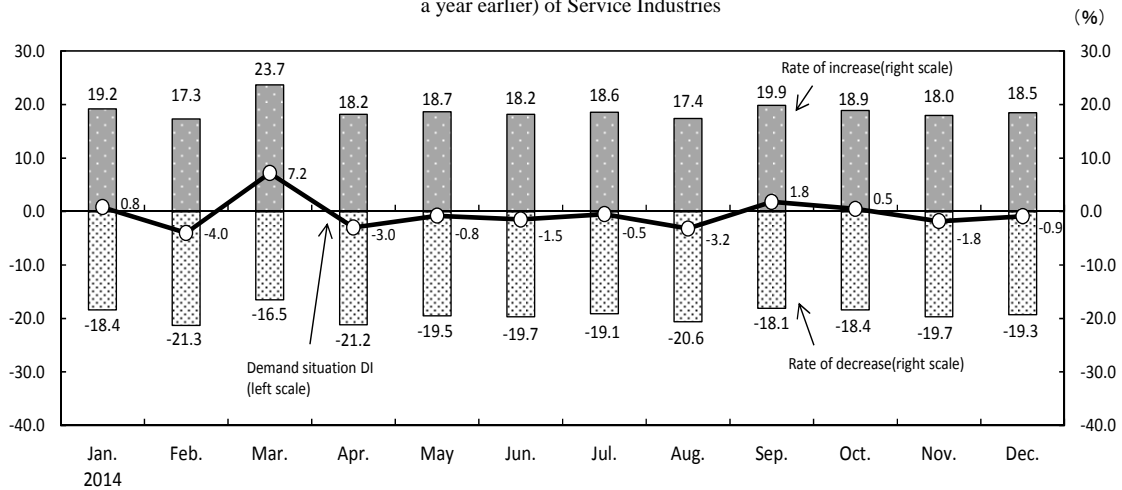
| | | 2014 | | | | | | | | | | | |
|--------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| | | Jan. | Feb. | Mar. | Apr. | May | Jun. | Jul. | Aug. | Sep. | Oct. | Nov. | Dec. |
| Change over the year (%) | Service industry | 1.0 | 0.8 | 0.7 | 1.0 | 1.1 | 0.9 | 0.9 | 0.8 | 0.9 | 0.7 | 0.8 | 0.8 |
| | Information and communications | 2.3 | 1.9 | 2.3 | 2.3 | 2.4 | 1.9 | 2.0 | 2.4 | 2.3 | 3.1 | 3.2 | 3.4 |
| | Transport and postal activities | 2.8 | 1.2 | 1.6 | 1.5 | 1.1 | 1.0 | 2.0 | 0.8 | 0.4 | 0.6 | 0.9 | 0.2 |
| | Real estate and goods rental and leasing | 2.9 | 3.1 | 2.6 | 2.0 | 2.0 | 0.3 | 0.1 | 0.5 | 0.6 | 0.4 | -0.1 | -0.2 |
| | Scientific research, professional and technical services | 2.0 | 1.6 | 1.3 | 1.2 | 1.3 | 1.1 | 1.6 | 1.1 | 1.2 | 0.6 | 0.5 | 0.4 |
| | Accommodations, eating and drinking services | 0.0 | -0.5 | -0.7 | 0.3 | 0.5 | 0.2 | -0.1 | 0.6 | 0.2 | -0.2 | 0.2 | 0.7 |
| | Living-related and personal services and amusement services | -0.3 | 0.0 | -0.4 | -0.3 | -0.2 | -0.3 | -0.3 | -0.2 | -0.1 | -0.7 | -0.7 | -0.9 |
| | Education, learning support | -1.7 | -0.9 | -0.3 | 1.1 | 1.7 | 0.9 | 2.7 | 2.1 | 2.9 | 2.8 | 2.8 | 3.0 |
| | Medical, health care and welfare | 1.4 | 1.4 | 1.7 | 1.7 | 1.5 | 1.8 | 1.9 | 1.7 | 1.9 | 1.6 | 1.8 | 1.6 |
| | Services.n.e.c. | 0.0 | 0.3 | -0.8 | 0.0 | 0.7 | 0.8 | -0.8 | -0.6 | 0.0 | -0.1 | -0.1 | 0.1 |
| Contribution ratio | Service industry | 1.0 | 0.8 | 0.7 | 1.0 | 1.1 | 0.9 | 0.9 | 0.8 | 0.9 | 0.7 | 0.8 | 0.8 |
| | Information and communications | 0.15 | 0.13 | 0.15 | 0.16 | 0.16 | 0.13 | 0.14 | 0.16 | 0.16 | 0.21 | 0.22 | 0.23 |
| | Transport and postal activities | 0.36 | 0.15 | 0.20 | 0.19 | 0.14 | 0.13 | 0.26 | 0.10 | 0.05 | 0.08 | 0.12 | 0.02 |
| | Real estate and goods rental and leasing | 0.17 | 0.18 | 0.15 | 0.12 | 0.11 | 0.02 | 0.01 | 0.03 | 0.03 | 0.02 | -0.01 | -0.01 |
| | Scientific research, professional and technical services | 0.12 | 0.10 | 0.08 | 0.07 | 0.08 | 0.06 | 0.10 | 0.07 | 0.07 | 0.03 | 0.03 | 0.02 |
| | Accommodations, eating and drinking services | 0.00 | -0.10 | -0.13 | 0.05 | 0.10 | 0.03 | -0.02 | 0.12 | 0.03 | -0.03 | 0.04 | 0.13 |
| | Living-related and personal services and amusement services | -0.03 | 0.00 | -0.04 | -0.03 | -0.02 | -0.03 | -0.03 | -0.02 | -0.01 | -0.07 | -0.07 | -0.09 |
| | Education, learning support | -0.06 | -0.03 | -0.01 | 0.03 | 0.06 | 0.03 | 0.09 | 0.07 | 0.09 | 0.09 | 0.09 | 0.10 |
| | Medical, health care and welfare | 0.33 | 0.33 | 0.40 | 0.40 | 0.36 | 0.43 | 0.45 | 0.39 | 0.44 | 0.37 | 0.43 | 0.38 |
| | Services.n.e.c. | 0.00 | 0.03 | -0.10 | 0.00 | 0.09 | 0.10 | -0.10 | -0.08 | 0.00 | -0.01 | -0.01 | 0.01 |

(3) Demand Situation

Demand Situation DI compared with the previous year to service industry in 2014 decreased in month except January, March, September and October.

(Figure 3-3)

Figure 3-3 Change in Demand Situation DI (compared with the same month a year earlier) of Service Industries



Note: Changes in figures indicate “-” for decrease.