

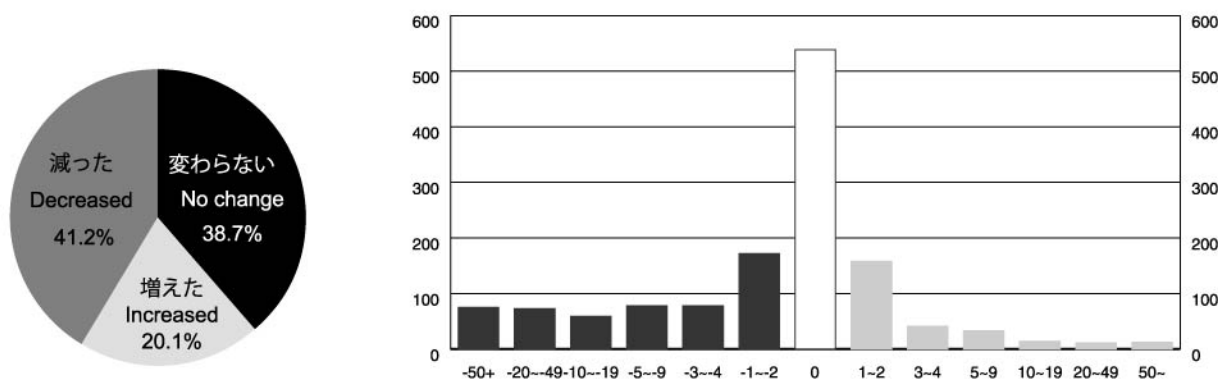
調査実施概要 SCOPE OF SURVEY

調査期間 Survey Period	2009年 09月24日～10月16日 September 24th ~ October 16th, 2009			
調査対象 Survey Target	在米日系企業(現地法人、駐在事務所、合併企業、支店) Japanese Companies in the U.S. (Subsidiary, Representative Office, Joint Corporation, Branch Office)			
調査方法 Survey Method	インターネット調査 Internet Survey			
有効回答数 Valid Sample	1.406 社 1.406			
有効回答ポジション数 Valid Position Sample	8968 名分 8968 position			
回答企業所在地と地域区分 Location of Respondents & Regional Classifications	I, Northeast (356) New York, New Jersey, Connecticut, Pennsylvania, Massachusetts II, Midwest (247) Illinois, Ohio, Michigan, Indiana, Wisconsin III, South (180) Georgia, Kentucky, Virginia, D.C., Tennessee, Texas, Maryland, Florida, Alabama, North Carolina, South Carolina IV, West (623) California, Washington, Oregon, Arizona, Colorado, Nevada, Hawaii IV-i, Northern California (104) San Francisco, Santa Clara, San Mateo, Santa Cruz, Alameda, Sacramento, Monterey, Contra Costa, Marin, Sonoma IV-ii, Southern California (508) Los Angeles, Orange, Riverside, San Bernardino, San Diego, Imperial, Ventura, Santa Barbara, Kern, San Luis Obispo			
調査対象職種 Survey Period (職種別サンプル数) (Sample by Occupation)	経理 Accounting	1476	マーケティング Marketing	391
	財務 Finance	220	電気・電子エンジニア Electric/Electronics Engineer	305
	アカウント・オフィサー Finance Front Office/Account Officer	88	機械エンジニア Mechanical Engineer	478
	ファイナンシャル・アナリスト Finance Mid Office/Analyst	44	品質管理 QA/QC	355
	オペレーター Finance Back Office/Operator	45	生産管理 Production Control	328
	人事 Human Resources	530	ソフトウェアエンジニア IT Software Engineer	185
	総務 Administration/General Clerk	657	情報管理 / システムアドミニストレータ IT MIS/System Administrator	260
	カスタマーサービス Customer Service	603	ヘルプデスク / テクニカルサポート IT Help Desk/Technical Support	153
	秘書 Executive Secretary	186	倉庫 / 物流 Warehouse/Distribution/Logistics	582
	営業 Sales	1394	輸出入 Import and Export	292
			購買 Purchasing	396

従業員の増減 CHANGE IN NUMBER OF STAFF

1. 過去一年間の従業員数の増減 Change in number of staff compared to one year ago

(1) 従業員数の増減 Change in number of staff



今年度は従業員数を減らした企業が昨年より 19.3 ポイント増加し、全体の 40% 以上となりました。これは過去 3 年間で最大の下げ幅の記録となりました。減少人数も 50 人以上と回答した企業数も多く、世界同時不況の影響により多くの企業で大きな人員整理やレイオフが行われたことが伺えます。一方、従業員が増えたと回答した企業は昨年度より 11.1 ポイント減少した 20.1% となりました。

Compared to the previous year, companies that responded as having decreased the number of employees, increased by 19.3 %. This represents more than 40% of all companies. This was the biggest percentage loss in the last three years. Many companies reduced their staff by more than 50 employees, which implicates that the global economic recession caused drastic lay offs. The number of companies that expanded in size, decreased by 11.1% compared to the previous year, for a total of 20.1% last year.

(2) エリア別従業員数の増減 Change in number of staff - by region

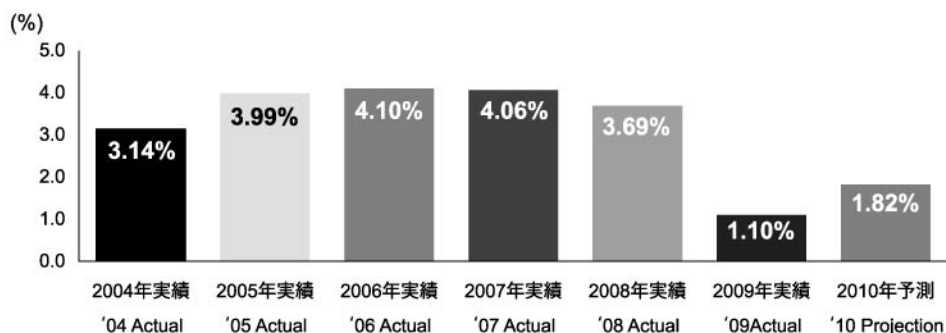
	Northeast	Midwest	South	West	Northern CA	Southern CA
Decreased	30.68%	57.72%	61.67%	34.48%	34.00%	34.53%
No change	22.73%	8.54%	14.44%	24.84%	24.00%	24.75%
Increased	46.59%	33.74%	23.89%	40.68%	42.00%	40.72%

地域別で見ると南部では 61.67%、中西部では 57.72% で従業員数が減ったと回答されていました。自動車業界をはじめ、工場を持つ製造業全般で特にレイオフが実施されたのではないかと考えられます。一方、北東部や西部では従業員数が減少した企業よりも増加した企業の割合が高くなっています。景気の回復は金融や製薬業界の多い東海岸や、食品やサービス業の多い西海岸から先に見られていると考えられます。

This year, 61.67% of companies in the South, and 57.72% in the Midwest replied that they had reduced their workforce. The reduction in manufacturing industries such as in the automotive industry, influenced these results. However, in the Northeast and West regions, there are more companies that increased the number of employees. It is conceivable that recovery from the recession will be more evident on the East and West coasts as there are more financial and pharmaceutical companies in the east and more food and service industries in the west.

昇給率 PERCENTAGE OF SALARY RAISES GIVEN

1. 昇給率 Percentage of salary raises given



2009年度の昇給率は1.10%となり、昨年度実績(3.69%)、予測(3.38%)を共に大きく下回り、2009年2月に追加調査した2009年度の予測(1.39%)よりも低い結果となりました。景気後退が顕著に現れていたのではないのでしょうか。職種別の給与水準では財務が昨年と比べて約13%マイナス、ソフトウェアが約7%マイナスと、これまで給与水準が最も高かった2ポジションが大きく下がりました。各職種で中央値が下がっていることから、ワークシェアリングを含む給与カットや、高い給与のポジションのレイオフが進み、人件費を抑えようとした結果が伺われます。また、2010年度の昇給率の予測は1.82%と今年度の実績より高い数値となっています。

The percentage of salary raises this year was 1.10%, significantly falling short of last year's percentage (3.69%) and the projected percentage for 2009 (3.38%). The percentage of 1.10%, was also under the result obtained (1.39%) by a supplementary survey conducted in February 2009. Clearly, this was the result of the global recession. Two highly paid occupations, Finance and Software Engineering, dropped salary levels considerably (-13% and -7% respectively). The medium of all positions dropped across the board and this may have been caused by companies implementing work sharing programs, pay cuts and the laying of higher salary positions. The projected salary raise percentage for 2010 is 1.82%, which is slightly higher than this year's actual percentage.

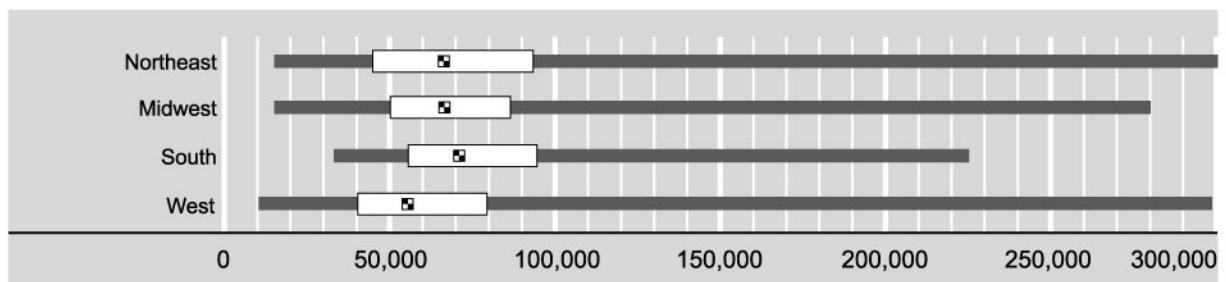
10 営業 Sales

Annual Salary (US\$)

	Minimum	25%	Median	75%	Maximum	Mean
Annual base salary	10,000	45,000	62,000	85,000	400,000	70,094
Bonus	100	2,500	5,600	12,000	176,000	10,905
Total cash compensation	10,000	46,735	65,560	90,000	400,000	75,080

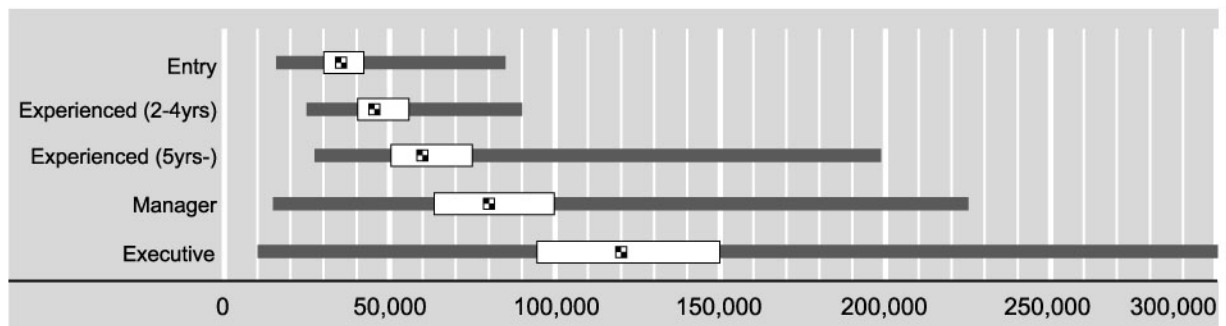
Area (US\$)

	Minimum	25%	Median	75%	Maximum	Mean
Northeast	15,000	45,000	68,000	93,000	400,000	75,364
Midwest	15,000	50,000	68,380	87,000	280,000	72,062
South	33,600	55,000	71,360	95,000	225,000	78,665
West	10,000	40,000	55,000	79,850	292,000	64,075



Career Level (US\$)

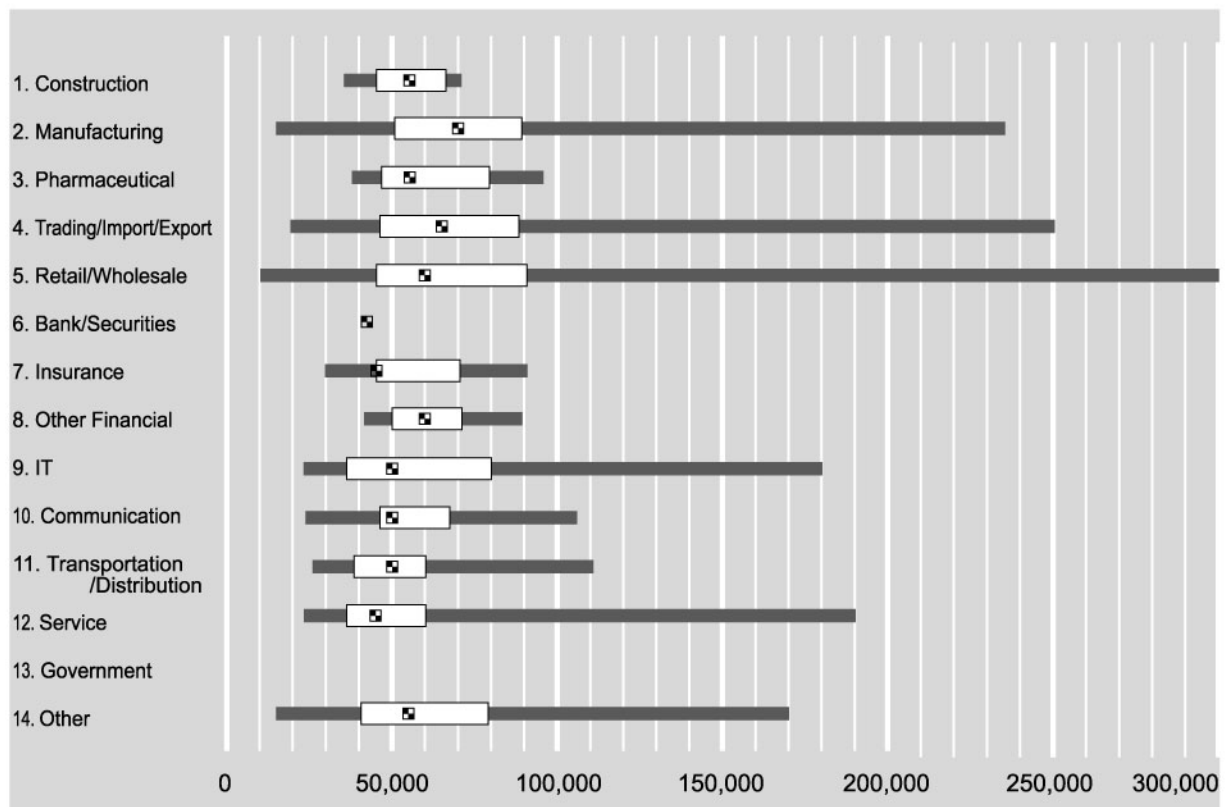
	Minimum	25%	Median	75%	Maximum	Mean
Entry (less than 2 years)	15,000	30,000	36,000	42,000	85,000	38,335
Experienced (2 to 4 years)	24,000	40,000	45,000	56,000	90,000	48,570
Experienced (more than 5 years)	27,000	50,000	60,000	75,000	197,000	62,905
Manager	14,000	63,000	80,000	100,000	225,000	82,292
Executive	10,000	94,000	120,000	150,000	400,000	126,898



營業 Sales

Industry (US\$)

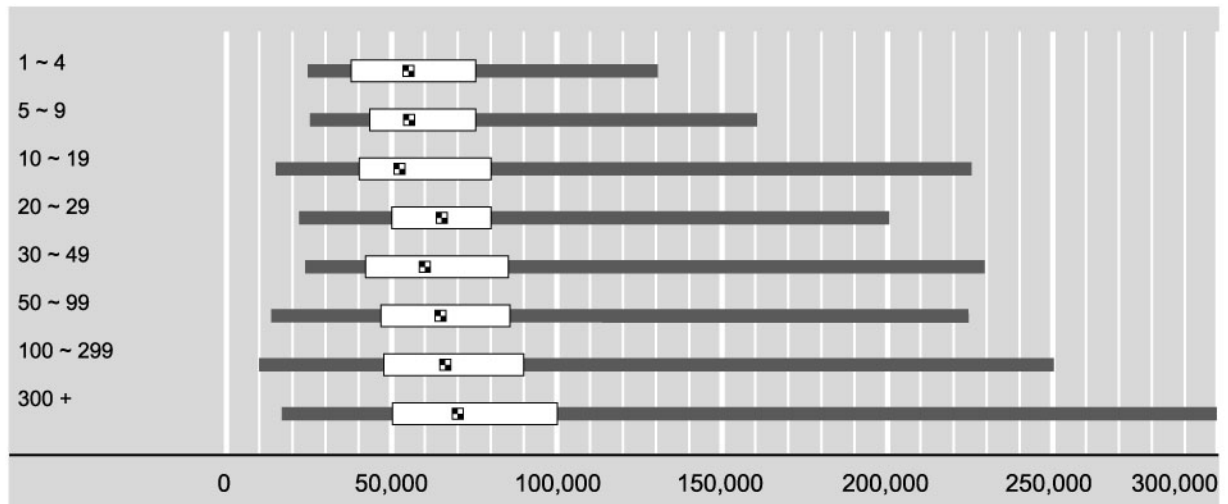
	Minimum	25%	Median	75%	Maximum	Mean
Construction	36,000	44,750	55,000	65,750	70,000	54,800
Manufacturing	15,000	51,000	70,000	89,250	235,000	73,989
Pharmaceutical	37,892	46,457	55,000	81,250	95,000	62,885
Trading/Import/Export	20,000	45,900	64,500	88,000	250,000	71,821
Retail/Wholesale	10,000	45,000	60,000	90,842	400,000	76,450
Bank/Securities	42,000	42,000	42,000	42,000	42,000	42,000
Insurance	30,000	45,000	45,000	70,000	90,000	56,000
Other Financial	42,000	49,500	60,000	71,250	88,500	61,917
IT	24,000	36,000	50,000	80,000	180,000	62,492
Communication	24,000	45,500	50,000	67,500	105,000	57,455
Transportation/Distribution	26,500	38,125	50,000	60,000	110,000	51,049
Service	24,000	36,000	44,500	60,000	190,000	51,555
Government	-	-	-	-	-	-
Other	15,000	40,000	54,500	78,750	170,000	64,001



営業 Sales

Employee Size (US\$)

	Minimum	25%	Median	75%	Maximum	Mean
1 ~ 4	24,000	38,000	55,000	75,500	130,000	58,857
5 ~ 9	25,000	43,200	55,000	74,500	160,000	59,665
10 ~ 19	15,000	40,000	51,500	80,000	225,000	62,958
20 ~ 29	21,600	50,000	65,000	80,000	200,000	69,800
30 ~ 49	24,000	42,000	60,000	85,000	228,800	68,272
50 ~ 99	14,000	47,075	64,771	85,850	224,500	69,304
100 ~ 299	10,000	47,950	67,230	90,000	250,000	72,727
300+	17,500	50,000	70,000	100,000	400,000	83,511



職務定義

既存の顧客、新規顧客への商品・サービスの提供と販売を行う。顧客のニーズと商品・サービスを関連させ、商品・サービスの販売促進を行う。

Job Description

Interacts with existing and potential customers to increase sales of organization's products and services. Promotes the company's products and services by highlighting features relevant to the customer's needs.

営業 Sales

Analysis

地域別分析 Analysis by Region:

年間給与・ボーナス額ともに最小値と最大値の幅が非常に大きく、特徴として歩合制・コミッションを付与しているケースも多いのが営業職です。対昨年の中値で言えば、南部の数値の上昇が目立ちます（16%）。他地域も横ばい若しくは微増なので、景気減速の中でもビジネス開拓に欠かせない営業職に投資をしている企業は多いのではないかと考えられます。

It is common to find significant wide spreads between minimums and maximums for both salary and bonus. A significant number of companies reward sales staff through a commission system. The South region saw a rise of 16%, in comparison to last year. Unchanged or slightly increased salaries in other regions indicate that employers are willing to invest in Sales positions to pursue business development in this economic recession.

職位別分析 Analysis by Position:

職位が上がるにつれて、中央値が上昇し、給与レンジが拡大していることがわかります。また、職位の上昇と最小値が比例しないのは、前述した営業コミッションに一因があります。日系企業でも多数の企業が営業コミッションを取り入れていることから、営業職のベースサラリーには非常に差異があり、個人差が出るものという事が出来た。

As the position level increases, the medians increase and salary ranges expand. Due to the aforementioned commission system, the minimum salary for each level doesn't increase in proportion to the position level. Many Japanese companies are using commission systems, so there is a large gap in base salary among sales positions.

業種別分析 Analysis by Industry:

昨年度に比べて、最も中央値の変動が大きかったのは製薬 (Pharmaceutical) 業界で、中央値は \$10,000、平均値は \$8,506 の上昇となりました。製薬業界は景気の波を受けにくいとされており、2009 年は事業再編や M&A が積極的に敢行された年でもあり、営業職への投資がなされたと考えられます。また、近年上昇を続けていた通信 (IT、Communication) 業界は横ばいとなりました。

The pharmaceutical industry has the largest increase; \$10,000 increase in the median, and \$8,506 increase in the mean. This particular industry is said to be unaffected by economic fluctuations. A lot of companies actively reorganized their structure and underwent M&A's and also invested in their Sales workforces. The IT and Communications industries have had continuous increases, but their salaries stayed unchanged this year.

規模別分析 Analysis by Company Size:

大手から中小規模まで、全体的に数値は上昇の傾向にあります。最小値は軒並み数値が下がっている点から、営業職に関してはエントリーレベルの採用もある程度積極的に行われている事が推測されます。

In all sizes of companies, entire salary ranges increased. The medians for Entry-level positions declined from last year, illustrating active hiring at that level.