

## “ White Paper on Leisure ”

The Japan Productivity Center has published a “ White Paper on Leisure ” since 1977 based on a survey of leisure market trend and consumer’s attitude toward their leisure activities. The Year 2014 version (survey on 2013 trend) covers both genders from the age of 15 to 79 and 107 goods and services. The most popular leisure activities (“My most favorite leisure”) and their satisfaction level and that of the leisure life style were measured by each age and gender group by one to five points based on their satisfaction level.

### Point 1

#### Leisure Market Size Turned to Increase After 11 Years Interval “Domestic Travel” collected the largest number of participants

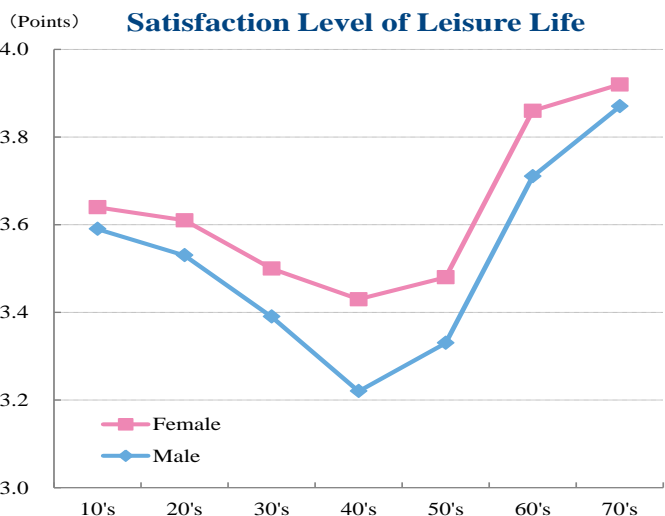
- The size of leisure market in 2013 increased by 0.8% y-o-y to 65.2 trillion, after 11 years since 2002. Tourism sector increased by 4.0 % y-o-y for two years in row (+4.5% y-o-y in 2012) which raised the overall market size. Eating-out, Karaoke and lottery of amusement sector also increased. The top three leisure items in terms of participant number were; No.1 “Domestic Travel”, No.2 “Driving” and No.3 “Eating-out” which remained the same as year 2012.

### Point 2

#### Senior Age Group Showed the Higher Level of Satisfaction

Relatively high improvement and expectation level feeling in the age group of 60’s

- Analysis of satisfaction level by age groups, shows people in the age group of 60’s and 70’s are relatively highly satisfied in both gender groups and 70’s is the most satisfied group with the leisure life style.
- For improvement level compared with that of 5 years ago, age group of 10’s is the highest whereas 40’s is the lowest. As to expectation level in 5 years, no differences are found amongst age groups from 10’s to 50’s and 60’s has the highest level.
- In general, the age group of 60’s which is the generation starting their retirement life showed the higher number in the level of satisfaction, improvement and expectation of the leisure life than other age groups.



(Notes) Satisfaction Level of Leisure Life: Calculated average by gender groups and by age groups by accumulating points as "Satisfied"= 5, "Almost Satisfied"= 4, "Not Sure"= 3, "Almost Unsatisfied"= 2, "Unsatisfied"= 1  
(Source) SMAM, based on The Japan Productivity Center (JPC) data

### ■ Vigorous consumption by active elderlies as average life expectancy increased

According to the latest “Abridged Life Table” released by the Ministry of Health, Labour & Welfare on July 31, the average life expectancy of both genders increased to 80.21 years for men, exceeded 80 years for first time, and 86.61 years for women. The leisure consumption by the active elderlies is increasing along with the extension of their life span after retirement as their average life expectancy increases. The consumption by elderlies is attracting people’s attention, as the sales promotion of satchel for new primary students and business for 7,5,3 age anniversary festivals, a traditional Japanese festival to celebrate healthy growth of children, has already started this summer earlier than usual, targeting their grand parents’ expenses.

### ■ Active leisure consumption by younger generation is anticipated with wage hike

On the other hand, the levels of satisfaction, improvement and expectation of leisure life of age groups between 10’s and 40’s are relatively modest for both genders, especially in terms of the satisfaction level and expectation level of 20’s to 40’s is rather low. The amount of indispensable expenditure of these age groups is large as they need to spend in their marriage and various life events relating to raising their children. We anticipate that the wage environment should improve more for the Japanese economy to further grow with the help of the increase in leisure consumption in the future and by making people refreshed through leisure activities.

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