

“White Paper on Leisure”, Leisure Market is Expanding

Leisure market trend and consumer’s attitude toward their leisure activities can be captured by the “White Paper on Leisure” published every August by the Japan Productivity Center. A Summary is released in later July prior to its publication. The White Paper for 2015 is the 39th version since first published in 1977 and it covers both genders from the age of 15 to 79 with responses from 3,325 people.

Point 1

Size of leisure market increased for two years in a row

The tourism sector attributed to the increase of the overall market size

- The size of the leisure market in 2014 increased by 0.6% YoY to JPY 72.9 trillion, for two years in a row. ‘Tourism’ increased by 5.0 % YoY, being the leading force of the expanding market size. Among the sectors, ‘Travel in Japan’ increased sharply and ‘Amusement Parks’ also increased. ‘Hotels’ recorded double digit increase as the number of foreign travelers to Japan increased.
- Meanwhile, ‘Sports’ increased by 0.7% YoY as sales of sporting goods and watching sports increased. ‘Entertainment’ remained subdued, increased marginally by 0.1% YoY as the recovery in public gambling such as horse racing was offset by the continuing fall in sales of pachinko (Japanese pinball game), TV games and penny arcades. ‘Hobby’ decreased by 1.8% YoY, as the increase in movies and music concerts was offset by the fall in sales of cameras, audio equipment, DVD and books. As a whole, relatively stable growth was seen in “outdoor leisure activities”.

Point 2

“Travel in Japan” remained as the most popular leisure

“Walking” is gaining popularity

- Analysis of popularity of leisure activities by category shows “Travel in Japan” as the most popular by the estimated number of people participating, for 4 consecutive years. Other than this, “Window shopping” and “Shopping complex & Outlet malls” were ranked 5th and 6th, respectively. According to the “White Paper on Leisure”, “Walking” is gaining popularity as the number of people participating in activities such as “Strolling”, “Picnic, Hiking and Outdoor Walking” are increasing.

Top 10 Leisure Activities by Number of Participants (Comparison of 2014 to 2013)

2013			2014		
	Types of Leisure Activities	million		Types of Leisure Activities	million
1	Travel in Japan	55.9	1	Travel in Japan	54.0
2	Driving	46.9	2	Eating-out (Excluding daily meals)	50.0
3	Eating-out (Excluding daily meals)	44.7	3	Reading (Just for leisure)	49.9
4	Reading (Just for leisure)	44.4	4	Driving	48.7
5	Movies (Excluding on TV)	37.8	5	Window shopping	45.1
6	Shopping complex & Outlet Malls	36.9	6	Shopping complex & Outlet Malls	44.3
7	Window shopping	35.4	7	Movies (Excluding on TV)	40.5
8	Zoo, Aquarium etc.	35.0	8	Zoo, Aquarium etc.	36.9
9	Karaoke	33.6	9	Strolling	36.3
10	Lottery	33.3	10	Watching Video	35.9

(Source) SMAM, based on the Japan Productivity Centre

■ Travel demand is increasing steadily

According to the “Sales of Tourism Transactions Handled by Major Travel Agents” released by the Japan Tourism Agency, both April and May sales were positive YoY as inbound travel offset the decrease of outbound travel due to the weaker yen. Travel demand is showing a steady growth.

■ Leisure expenditure to increase as wage hike is expected

Leisure expenditure growth is anticipated as a further hike in wages are expected in the future. Leisure related markets such as consumption and services are expected to be buoyant.

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