

## Outdoor leisure activities are getting popular in “Leisure Market”

Leisure market trend and consumer’s attitude toward their leisure activities can be captured by the “White Paper on Leisure” published every early August by the Japan Productivity Center. A Summary is released in later July prior to its publication. The White Paper for 2016 is the 40<sup>th</sup> version since first published in 1977. 2016 edition covers both genders from the age of 15 to 79 with responses from 3,375 people.

### Point 1

#### Size of leisure market shrank for the first time in 3 years

##### By sector, ‘Sports’ is showing outstanding recovery

- The size of the leisure market in 2015 shrank by - 1.0% YoY to JPY 72.3 trillion for the first time in 3 years. However, if you exclude Pachinko (Japanese pinball) & Pachi-suro (slot machine in a pachinko parlor) with significantly large market size, the leisure market size has grown by + 1.2%, increasing for 3 consecutive years.
- By sector, ‘Sports’ increased by + 1.9% YoY showing steady recovery. Meanwhile, ‘Sightseeing & Excursion’ moderately grew by + 0.6% YoY, rising for 4 consecutive years. On the other hand, ‘Entertainment’ and ‘Hobby’ decreased by - 1.5% and - 1.0% both YoY, respectively.

### Point 2

#### Number of participants of “Travel in Japan” was ranked 1<sup>st</sup> for 5 consecutive years

##### Exercises such as jogging and fitness are popular

- While, number of participants in various activities had decreased, that of “Travel in Japan” increased by one million YoY to 55 million people. Both a) partial inauguration of Hokuriku Shinkansen (a Japanese bullet train) in March 2015 and b) Silver Week (a long holiday in Japan) in September 2015 which was for 5 days off in a row for the first time in 6 years, seemed to have motivated people to travel.
- Meanwhile, “Jogging & Marathon” raised its ranking to 19<sup>th</sup> from last year’s 28<sup>th</sup>. Other than this, market size of fitness clubs renewed its record-high and overall sales of sporting goods are increasing. It seems that leisure market is shifting towards more active leisure activities.

#### Top 10 Leisure Activities by Number of Participants (Comparison of 2015 and 2014)

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



2015		
	Types of Leisure Activities	million
1	Travel in Japan	55.0
2	Eating-out (Excluding daily meals)	43.9
3	Driving	43.4
4	Reading (Just for leisure)	42.3
5	Watching movies (Excluding on TV)	36.6
6	Shopping complex & Outlet Malls	36.2
7	Zoo, Aquarium etc.	34.6
8	Music appreciation	33.4
9	Strolling	32.9
10	Karaoke	31.6

(Source) SMAM, based on the Japan Productivity Centre

## With increase of parents' leisure time, outdoor activities of their children increase

- 2016 White Paper on Leisure focused especially on leisure of children and conducted survey on influence of parents' leisure time to that of their children. According to this survey, participation rate of children in sports and creative activities which require time, increased with expanding free time of their parents. Meanwhile, children's participation rate to Zoo, Amusement park and Travel in Japan increased when their parents' had more free time. On the contrary, children's participation rate to Reading and Online gaming increased when their parents' leisure time decreased.
- New national holiday in Japan called "Day of Mountain" was newly launched this year which has increased time for parents to spend with their children. We may see more adults and their children actively enjoying outdoor leisure activities going forward.

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