

Outdoor Business Market in Japan: Key Research Findings 2017

◆ **Research Outline**

Yano Research Institute conducted a study on the domestic outdoor business market with the following conditions, disclosing the total size of the markets of outdoor facilities and various outdoor-activity services for the first time, in addition to the outdoor goods market that Yano has long comprehended:

1. Research period: From May to September, 2017
2. Research target: Domestic manufacturers, wholesalers, retailers of outdoor goods, companies that operate/provide outdoor facilities and services, organizations regarding outdoor activities, and etc.
3. Research methodologies: Face-to-face research by the expert researchers, surveys via telephone/email, and literature research

What is the Outdoor Business Market?

The outdoor business market in this research is the total size of outdoor goods market, outdoor facility market (mountain huts, campsites climbing gyms, and fishing sites under management), and outdoor-related service market (mountain guides, guides to nature, and outdoor-goods rental). In this research, the outdoor business market is categorized into following four styles: Mountain climbing, Light outdoor activities, Outdoor sports, and Lifestyle. Note that the products, facilities and services relating to any of marine leisure (diving, sea fishing and etc.) and winter sports (skiing, etc.) are not included in the outdoor business market size.

◆ **Key Findings**

■ **Domestic Outdoor Business Market Size in 2016 Attained 427.43 Billion Yen**

The domestic outdoor business market size in 2016 is estimated to have attained 427.43 billion yen. With regard to the market by style, 54.3% is occupied by “light outdoor activities” followed by “lifestyle” accounting for 18.5%.

■ **Market Size by Style Led by “Light Outdoor Activities” and “Lifestyle”**

Camping business has been prosperous after camping has attracted attention of wider generations from youngsters to the elderly or families. Apparel products and shoes sold by outdoor brands have now been well accepted in daily fashion styles. In such an environment, outdoor sports are also expected to grow for the future, now that sport climbing has rapidly been popular after it has been included in the official events of the Tokyo Olympic/Paralympic Games.

■ **Many Outdoor Brands Enhanced Lifestyle Products to Respond to Consumer Appetite**

In spite of being positioned as core business by outdoor brands, mountain climbing and trekking has been suffering from stagnant demands. In order to acquire recently-eager consumer demands, outdoor brands have enhanced product lines of lifestyle category and reorganized their existing products.

◆ **Report Format:**

Published Report: “Outdoor Business 2017”

Issued on: September 25, 2017

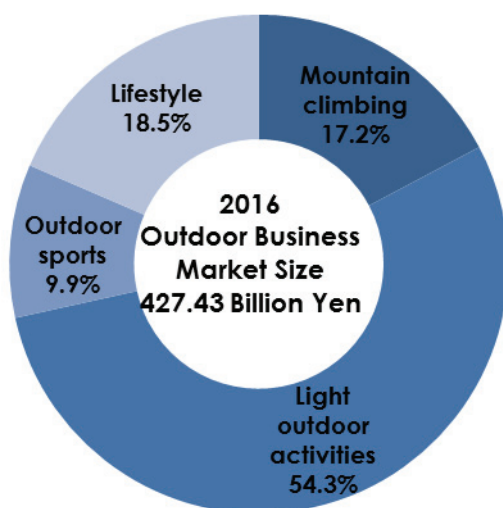
Language: Japanese

Format: 339 pages in A4 format

Price: 150,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

Contacts: Public Relations
Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)
 Phone: +81-3-5371-6912 E-mail: press@yano.co.jp

■ **Figure 1: Composition Ratio of Outdoor Business Market by Style**



Estimated by Yano Research Institute

Note:

1. The market size is based on the sales amount.
2. The products, facilities and services relating to any of marine leisure (diving, sea fishing and etc.) and winter sports (skiing, etc.) are not included in the outdoor business market size.

■ **Table 1: Market Definition by Style**

Style	Definition
Mountain Climbing	Products, facilities and services regarding leisure activities aiming mainly to "climb a mountain."
Light Outdoor Activities	Products, facilities and services regarding leisure activities aiming mainly to "recreate oneself in the nature," such as camping, hiking, fishing (mountain stream fishing), Ayu (sweetfish) fishing, heracrucian fishing, fishing using a lure (bass/trout), fly-fishing, outdoor festivals, and etc.
Outdoor Sports	Products, facilities and services regarding outdoor activities positioned as sports, which indicate trail running, sports climbing, and etc.
Lifestyle	Generally everything sold by outdoor brands and are not included in the above-mentioned items and are used in daily lives, business, and travel.

Estimated by Yano Research Institute