# Society and Growing Industries in Japan Beyond 2020: Key Research Findings 2016

## ◆ Research Outline

> **Yano Research Institute has conducted a questionnaire on the Japanese society and growing industries in 2020 and beyond with the following conditions:**
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> 1. Research period: From April to August, 2016
> 2. Research targets: Businessmen in the management planning dept. of the respective domestic listed companies at the first section and second section of the Tokyo Stock Exchange, JASDAQ Standard & Growth, and Mothers Stock Exchange. No listed foreign companies are included.
> 3. Research methodologies: Detention-method questionnaire.
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> **The Questionnaire on the Society and Growing Industries in Japan Beyond 2020**
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> This research was conducted to find out the trends of the Japanese society and the economy in 2020 and beyond, and also the goal/position for Japan to aim or how Japan should be toward 2030, the status of international society then, and measures to take in order for Japan to grow healthily toward the next 15 years. The questionnaire targeted the businessmen in the management planning department (270 cases) of the respective domestic listed companies in the first section and second section of the Tokyo Stock Exchange, JASDAQ Standard & Growth, and Mothers Stock Exchange.
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> The questionnaire results were analyzed to forecast the Japanese economy by 2020, projected growth rates of industrial sectors in which the companies of the respondents belong to, the technologies and business opportunities that may largely influence the future industries, and etc.

## ◆ Key Findings

### ■ 55.1% of Respondents Indicated Growth Rate of Actual Japanese GDP by FY2020 to be "0 to 1%"

To the question of what the average growth rate of actual Japanese GDP from FY2016 to FY2020 can be, 55.1%, the largest composition ratio of the respondents, who are the businessmen in the management planning department of the domestic listed companies (270 cases) answered that it is likely to be "0 to 1%." On the other hand, more than 30% of the respondents replied that they consider it to be 2% or more.

### ■ ICT Regarded to Attain 2.9% by FY2020, Largest Growth Rate among Various Industrial Sectors

When asked about the average growth rate until FY2020 of the specific industrial sector in which the companies of the respondents belong to, the respondents from ICT regarded their industry to attain 2.9%, the largest growth rate among the various industrial sectors. The next largest growth rate projected was 1.5% by the service industry (electricity/gas, land transport, finance and other services), followed by 1.2% by the manufacturing industry (metal, machinery, precision, electric, and transportation machinery) and the medical/chemistry/textile industry, respectively.

■ **Energy Attained 20.2%, Autonomous Driving Technologies 15.8% to Give Influence on Industries**

When asked to the businessmen in the management planning department of the domestic listed companies (270 cases) about the technologies or business opportunities that are considered to give the largest influences to the industrial sector that the respective respondents belong to, the largest percentage, 20.2 %, of respondents answered as "Energy," followed by "Autonomous driving technologies (15.8%)," "ICT (14.0%)," "VR/Drones/Robots (12.1%)," and "AI (11.0%)."

◆ **Report format:**

Published report: "Japanese Society and Growing Industries beyond 2020 --New Business Potential that Drives Near-Future Japan--"
Issued on: August 31, 2016
Language: Japanese
Format: 128 pages in A4 format
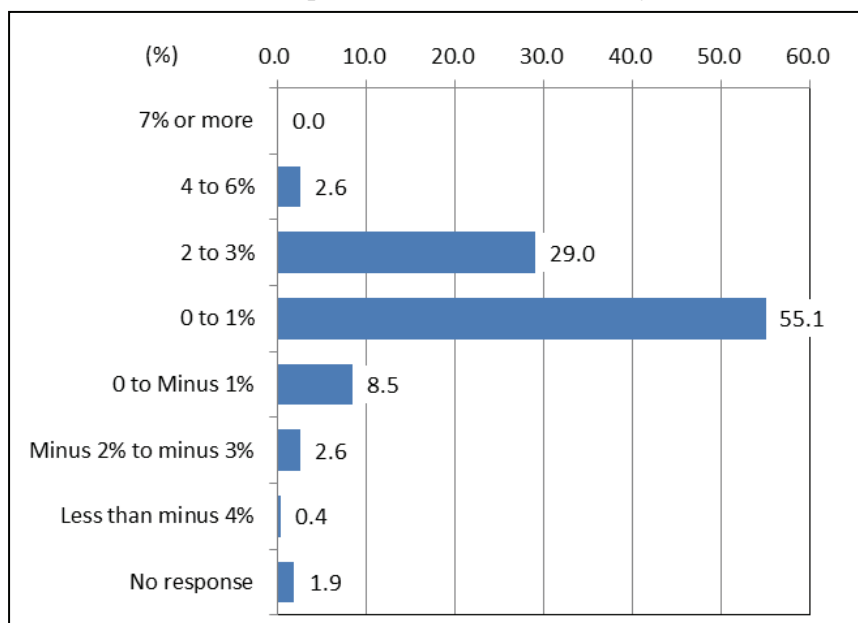Price: 110,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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■ **Figure 1: Estimated Actual Japanese GDP Growth Rate by FY2020**



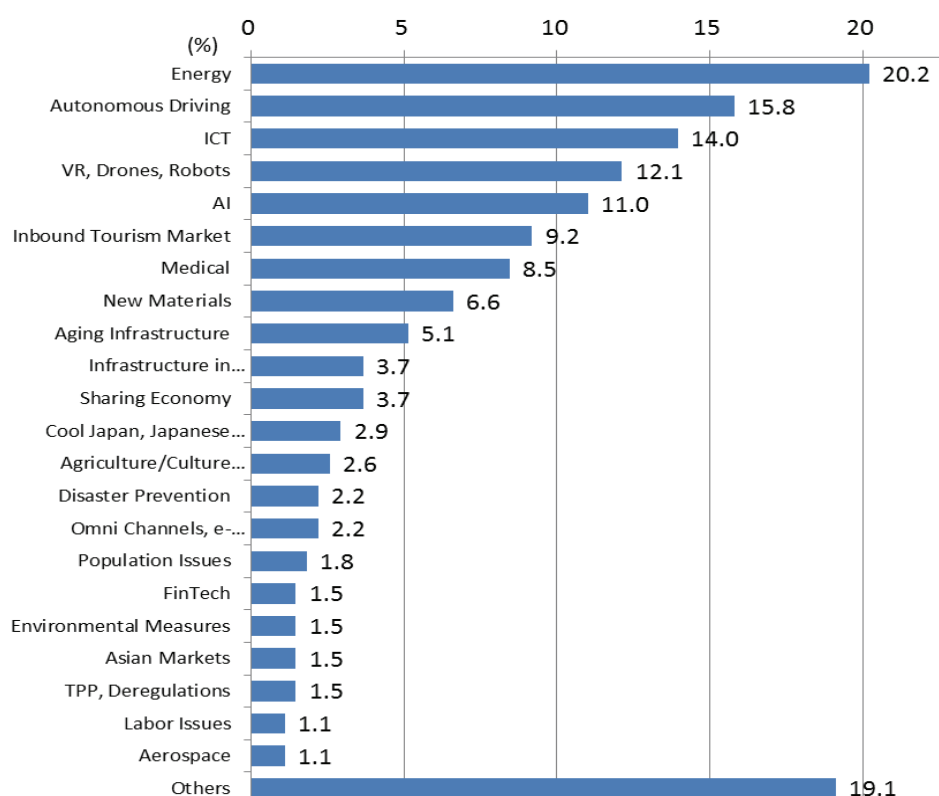Survey by Yano Research Institute

Notes:
1. Research Period - April to May, 2016; Target of Questionnaire - businessmen in the management planning dept. in the domestic listed companies (270 cases); Research Method - Detention-method questionnaire.

■  **Table 1: Projected Growth Rate by Industrial Sector**

| Industrial Sectors that Companies of Respondents Belong to (Industry Type, Large Classification) | Average Growth Rate from FY 2016 to FY 2020 |
|---|---|
| ICT | 2.9% |
| Service Industry (electricity/gas, land transport, finance and other services) | 1.5% |
| Manufacturing Industry (metal, machinery, precision, electric, and transportation machinery) | 1.2% |
| Medical/Chemistry/Textile Industry | 1.2% |
| Construction/Real Estate/Warehouses | 1.1% |
| Merchandising | 0.8% |
| Materials (Mining, Steel, Nonferrous Metals, Glass, Rubber, Paper/Pulp) | 0.7% |
| Foods/Other Manufacturing | 0.0% |

Survey by Yano Research Institute

■  **Figure 2: Technologies or Business Opportunities that Give the Largest Influences to industrial sectors**



Survey by Yano Research Institute

Notes:
2.  Research Period - April to May, 2016; Target of Questionnaire - businessmen in the management planning dept. in the domestic listed companies (270 cases); Research Method - Detention-method questionnaire.