

# Japan's Top 100 Markets: Now to 2025

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## Abstracts

There are nearly 800 cities in Japan within some 1,740 municipalities. Sifting through all these to find the best markets for your consumer product, brand, store, app, financial or other service is a huge and complex task. Japan's Top 100 Consumer Markets saves you the trouble. JapanConsuming has pulled together all the key datasets that impact consumption and consumer behaviour, analysed them, applied proprietary algorithms, and established which are the top 100 markets by consumer power – with additional data on the 23 Tokyo wards. With Japan's Top 100 Consumer Markets you can quickly work out where the opportunities are, and what level of investment is optimal, creating huge savings in time and money. This is the first ever report of its kind, giving you a major advantage over competitors.

## KEY QUESTIONS ANSWERED

Japan is a million piece puzzle, how can I work out which are the key markets?

Japan's Top 100 Consumer Markets provides a Consumer Power Ranking based on detailed research into 770 cities in Japan using 120 different sources and over 10,000 data points. It covers:

population now and future to 2040

land values

businesses and labour force

consumer incomes

savings and expenditure across all categories

retail sales & store numbers

restaurants, prices and many more categories.

This dataset was analysed to establish what are the top 100 markets in terms of consumer power. Weighting was applied to statistics relating to consumption and commerce.

### **What will be the key markets in the next 10-30 years?**

Japan's Top 100 Consumer Markets uses government and institutional forecasting data as well as statistics on migration, birth rates and investment flows as part of its calculation of the top 100 markets now and in the future. Population forecasts to 2025 and 2040 are also provided to help you plan for the long-term.

### **Where are the highest earners and savers?**

Japan's Top 100 Consumer Markets includes average incomes and savings levels for each market plus a top 100 ranking.

Overviews of each format, covering background, ownership, operations, characteristics.

### **What are the key markets for consumer spending?**

Japan's Top 100 Consumer Markets includes:

Top 100 rankings for all the main expenditure categories including Food, Apparel, Homeware, Household, Communications, Transport, Medical, Education, and Utilities, to help you quickly see where the top markets are for your product.

Profiles and detailed data on each of the top 100.

Expenditure by category by city to get clear overviews.

### **Where is retail concentrated?**

Japan's Top 100 Consumer Markets includes rankings on all key retail datasets including sales, space, densities, large stores, shopping centres and store numbers. Each market profile has full data on all retail activity.

### **What retail facilities are there and where?**

Included are complete lists of every shopping centre and department store in each of the top 100 markets.

Explain the market and its huge potential to head offices, investors and clients using graphical summaries, rankings and analysis

### **Know Your Market in Japan**

#### **The key markets in the next 10-30 years**

Japan's population is polarising as it shrinks, concentrating in cities where the best prospects and services are. Virtuous circles of more people, more businesses, more taxes, more services are encouraging even more migration to key cities like Kashiwa, Tsukuba and Hiroshima. while others lose out. Japan's Top 100 Consumer Markets identifies which markets to invest in.

#### **Retail investment is following migration**

Developers are watching migration trends and investment in businesses and real estate and following them with shopping centres and other retail facilities. Other markets are not only seeing little investment but existing stock is decaying and there are some cities to be avoided. The top 100 markets are relatively well positioned, but there is risk of serious decline in the regions even so.

#### **High retail sales per capita in smaller cities**

The dynamism of some smaller local retail hubs can best be seen in retail sales per store, per capita and sales densities. Other cities show surprisingly high sales per capita despite relatively low density of retail space, suggesting ample opportunity for new retail expansion. This is a factor that all the big domestic retail companies are fully aware of. They are already avoiding investment where retail density is higher than optimum for the population.

## **The highest sales are not always in markets with the biggest populations**

The volume of retail sales tends to follow population levels but there are exceptions. Kanazawa is only 35th in population but 25th in retail sales and other cities like Okayama, Sendai, Hiroshima and Machida have similarly high retail sales compared to populations.

## **The highest average incomes are not in Tokyo**

The highest incomes are found in cities that combine strong local businesses, commuters to major conurbations, and strong public administrations. There are also clear differences in some regions especially Tohoku and Chugoku.

## **Where the most spending is by category**

Selling apparel? The biggest consumers of fashion and apparel are not in central Tokyo but generally in satellite cities, often with younger households, but usually in easy commuting and shopping distance to the big centres.

Food? Food is a more robust spending category than apparel, but tastes and spending volume varies across the country, with, again, higher income satellite cities spending more. Southern markets, where there is better access to lower priced food, see relatively less spending.

If you are selling mobile services and apps, areas with long commutes are the key markets.

## **Saving is not just for older consumers**

Some of the larger, high density satellite cities around the big urban centres not only have the highest average savings in Japan but also the highest expenditure, all while having some of the younger populations.

## **The biggest spenders**

Apart from Tokyo, in general the highest expenditure is not seen in regional capitals. Commuter towns have bigger spending budgets than people living in the higher cost

urban centres.

### **Land values polarising as migration flows towards the larger cities**

Almost all Japanese cities have seen significant falls in land values in the last two decades. Some cities have seen prices decline by more than 50% and only a few cities saw net gains, but values are stabilising in the key regional hubs. The few cities with positive population growth forecasts to 2040 tend to hold up better.

### **Who is the report for?**

Anyone selling consumer products in Japan

Anyone selling services to consumers including financial, mobile, software etc.

Retailers, real estate businesses

Advertising and marketing firms

Consultants, Export Agencies, Legal Firms and other service providers involved in Japanese consumer markets

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