



Issued in May 2023

2022 Edition

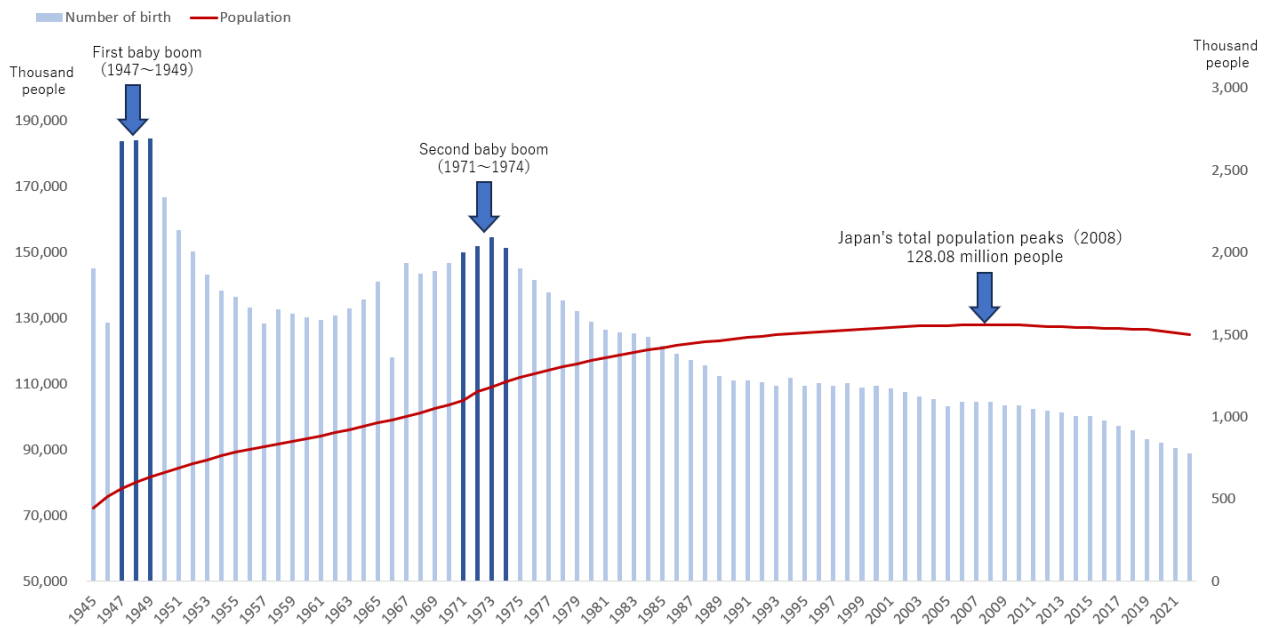
Marriage White Paper

Measures to Combat Declining Birthrate Based on Analysis of
Over 10,000 Successful Marriage Data

IBJ, Inc.

Current Situation in Japan

1. Trends in Birthrate and Population

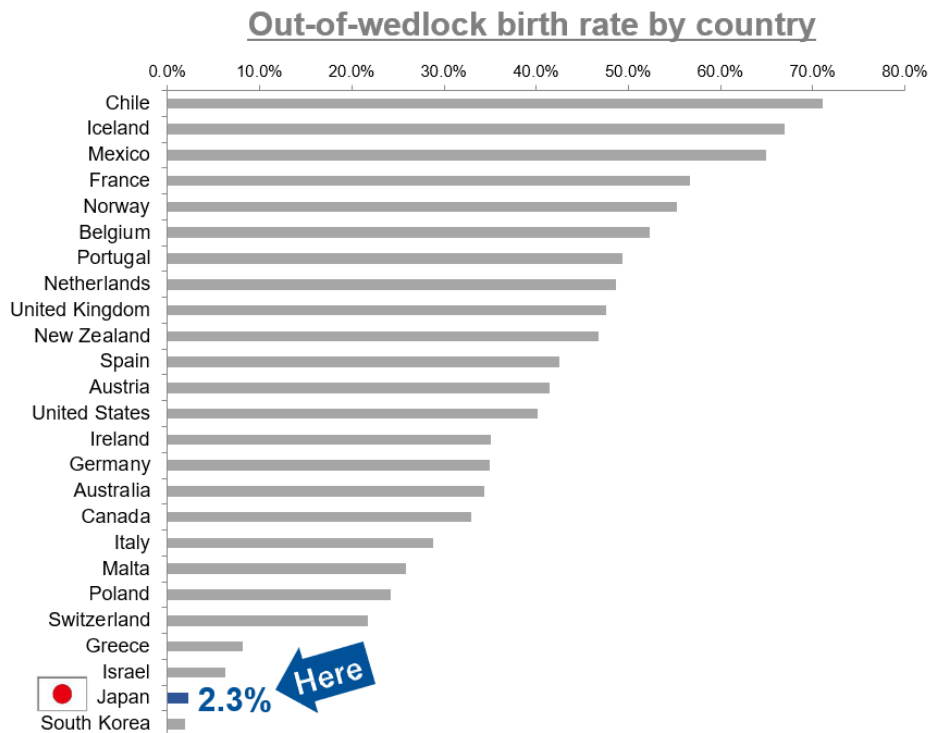


While Japan's population had been increasing since the post-war period, it is currently facing a situation where the declining birthrate, caused by a decrease in married couples, is leading to a population decline that cannot be halted. The total population, which was approximately 72 million immediately after the end of World War II in 1945, surpassed 100 million in 1967 due to an increase in birthrate during the first and second baby booms (1947-1949, 1971-1974), characterized by a temporary surge in birthrate. However, starting from 1975, the birthrate has been decreasing. After reaching its peak population of around 128.08 million in 2008, the number of deaths has exceeded the number of births for 13 consecutive years (2008-2021). If the birthrate continues to decline at the current rate, it is predicted that Japan's total population will fall below 100 million by 2056. Therefore, increasing the number of married couples and subsequently increasing the birthrate is necessary to address the social issues of declining birthrate and population decline in Japan.

2. Current Situation (2023) and Government's Viewpoint

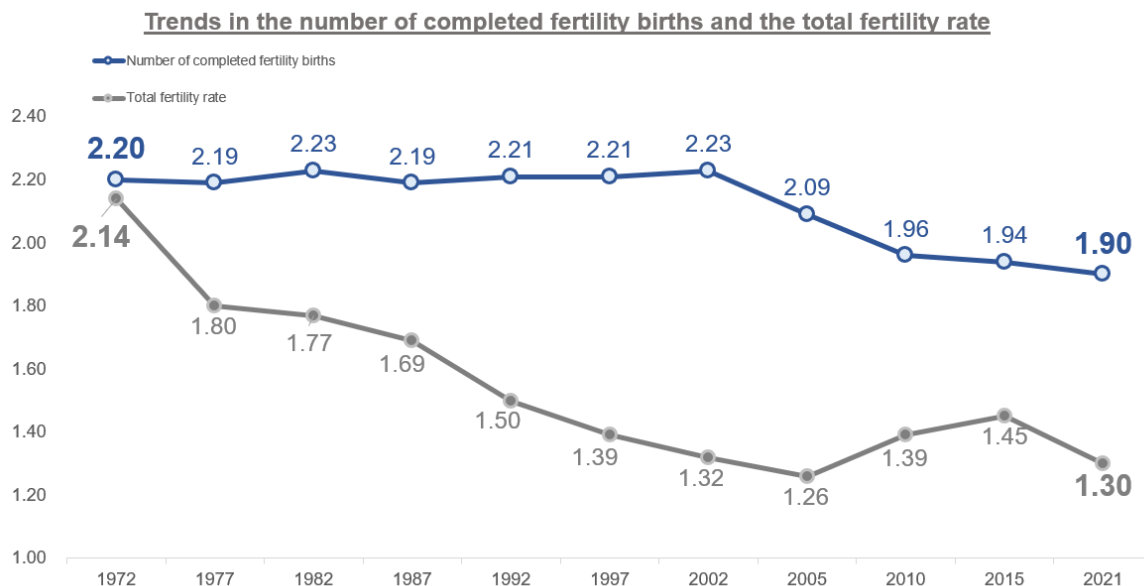
According to the population statistics announced by the Ministry of Health, Labour and Welfare, the estimated number of births in 2022 is expected to be 777,747, which is 28,750 fewer than the previous year, due to the impact of the COVID-19 pandemic and rising prices. The declining birthrate not only leads to a decrease in the growth potential of the economy but also poses a threat to the stability of social security systems such as pensions and healthcare. Therefore, the Japanese government considers the declining birthrate issue as a significant crisis. This year, as part of measures to address the declining birthrate, the government has proposed three pillars: 1) strengthening economic support such as childcare allowances, 2) expanding support for childcare facilities, sick child care, postnatal care, etc., and 3) promoting work-style reforms. However, the government is still exploring ways to find a solution to the declining birthrate issue.

3. Differences in the Extramarital Birthrate between Japan and Overseas



The extramarital birthrate refers to the proportion of children born to unmarried couples. Currently, while the extramarital birthrate in Western countries exceeds 40%, in Japan, it is only 2.3%, indicating a significant gap between Japan and Western countries. This creates a contrast between Western countries, where it is common to have children without being married, and Japan, where it is difficult to have children without being married. In Western countries, factors contributing to the high extramarital birthrate include legal protection associated with marriage and the societal acceptance of having children without being married. On the other hand, in Japan, there is still a widespread cultural norm that views getting married before having children as the expected path, resulting in an extremely low extramarital birthrate.

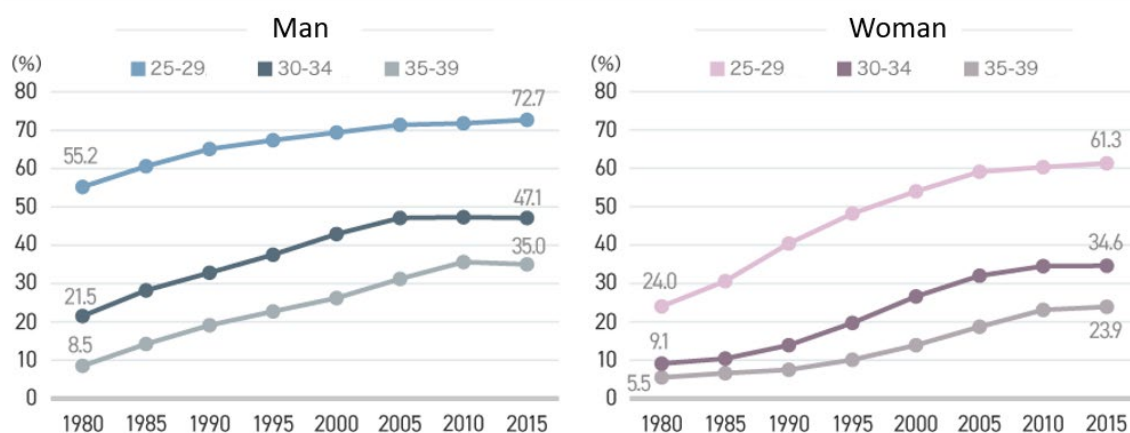
4. Trends in Total Fertility Rate and Completed Births



Examining the "total fertility rate," which is the sum of age-specific birth rates of all women aged 15 to 49 (regardless of marital status), including the second baby boom period (1971-1974), it had been fluctuating around 2.1. However, it started to decline after falling below 2.0 in 1975 and reached a record low of 1.26 in 2005. Although it increased to 1.45 in 2015, it dropped to 1.30 in 2021, showing a decrease of approximately 0.5 over the span of 50 years. On the other hand, the "completed births," which represent the number of children born to married women, have remained relatively stable from the 1970s to the present. This indicates that married couples in Japan have been consistently giving birth to about two children for the past 50 years, highlighting the importance of fostering new married couples to increase the number of births.

Background of the Increase in the Unmarried Rate in Japan

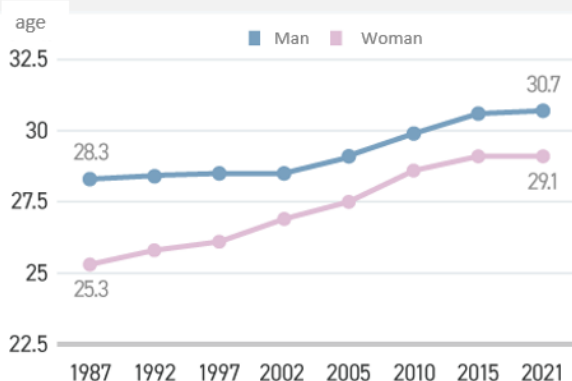
Trends in unmarried rates by age group



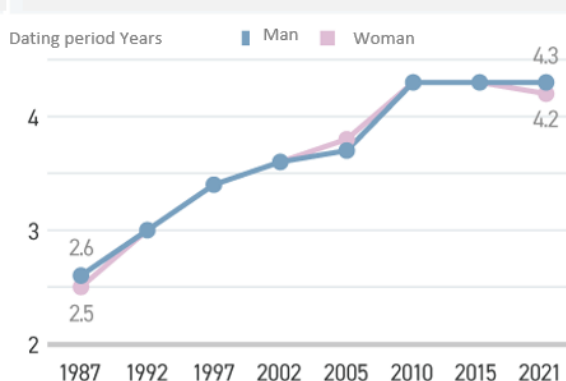
*Created based on the Ministry of Internal Affairs and Communications, Statistics Bureau, "Population Census"

Over the course of 35 years from 1980, the unmarried rate has increased for both men and women. Particularly, among women aged "25-29," it has increased by 37.3 percentage points, and among those aged "30-34," it has risen by 25.5 percentage points. There has been a growing number of women who are not married at the age commonly considered suitable for childbirth. The decrease in the number of marriages is directly linked to the decline in the "completed births" rate, so if the unmarried rate continues to rise, it is expected to lead to further decrease in the birth rate.

Trends in average age at first marriage



Trends in average dating period



*Target: Couples who got married within the past five years as of each survey point

*Created based on the National Institute of Population and Social Security Research, "16th Basic Survey on Birth Trends"

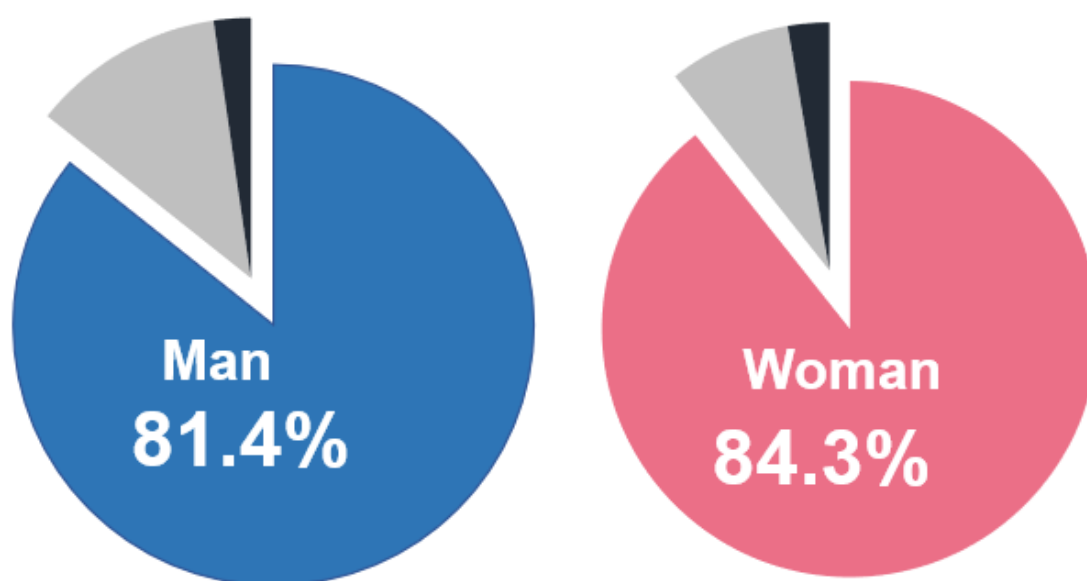
(The average dating period was independently calculated by subtracting the average age of first encounter from the average age of first marriage.)

The average age of first marriage is 30.7 for men and 29.1 for women, showing an increase of 2.4 years for men and 3.8 years for women compared

to 1987. The lengthening of the average dating period is also one of the factors contributing to delayed marriage. According to the National Institute of Population and Social Security Research, there has been a reversal in the proportion of "arranged marriages," where men and women meet and marry through a third party, to "love marriages," where men and women meet on their own, develop romantic relationships, and desire to marry. Since the late 1960s, the percentage of love marriages has surpassed that of arranged marriages. In the case of romantic relationships, there is no limit to the dating period, and there are cases where the decision to marry cannot be reached.

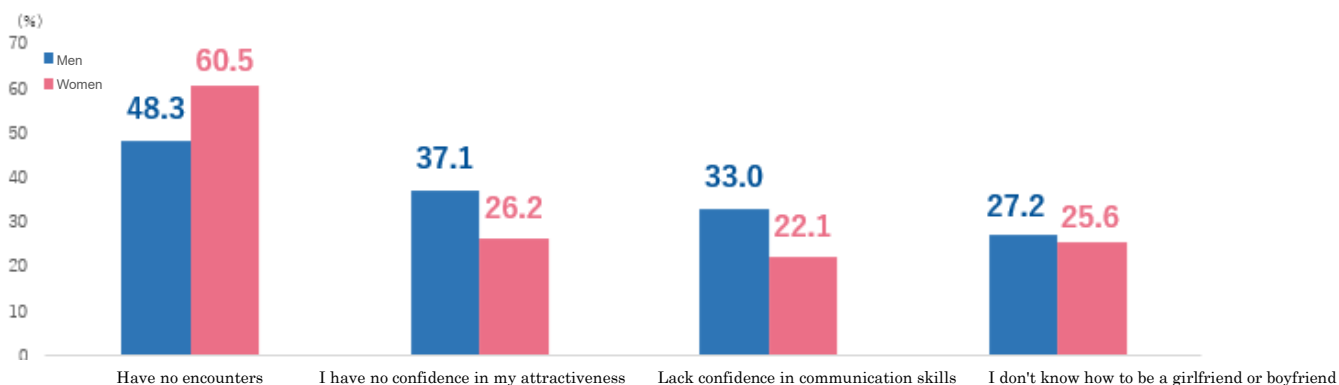
Reasons for the Lack of Increase in the Number of Marriages

Lifetime willingness of unmarried people to marry



According to the Basic Survey on Birth Trends, about 80% of unmarried men and women aged 18 to 34 have the intention to marry, indicating that the fundamental desire for marriage has not diminished.

Reasons for not having a lover among men and women in their 20s and 40s



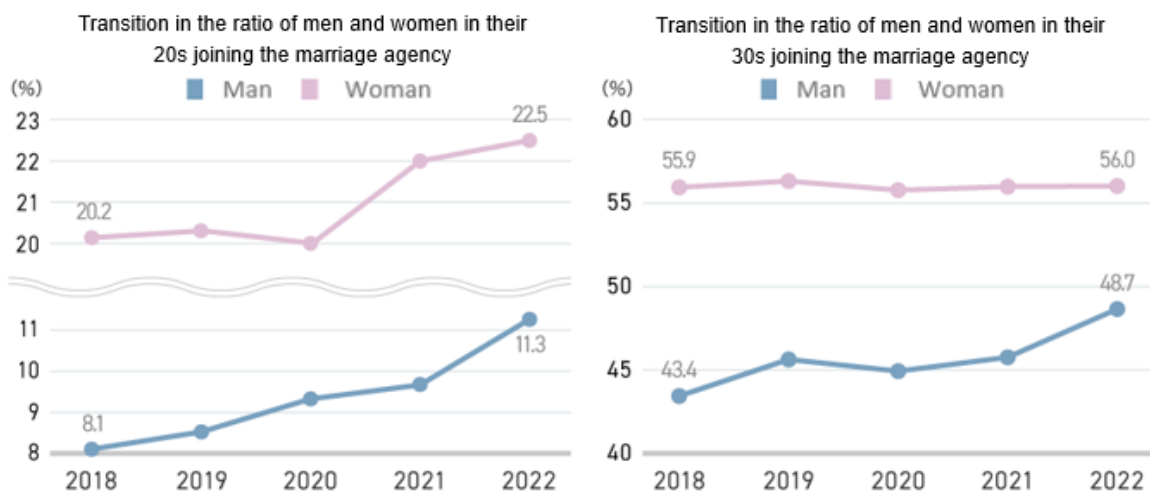
In this context, the reasons for the lack of increase in the number of marriages include external factors such as "lack of opportunities to meet" and

internal factors such as "lack of confidence in one's own attractiveness" and "difficulty in communication within the community." Currently, in Japan, there is a demand for "opportunities to meet" and "support from others" when it comes to marriage.

The Marriage Market in the Reiwa Era

In recent years, as the use of matchmaking apps has become more widespread, there has been an increase in cases where individuals with a serious intention for marriage seek opportunities for "meeting with marriage in mind" and join marriage consultation agencies. According to the Basic Survey on Birth Trends, the percentage of couples who met through online platforms, including matchmaking apps and social media ("met online"), has increased by 9.1 percentage points recently. The lowering of barriers to marriage activities and the expansion of user demographics have also become catalysts for joining marriage consultation agencies. Since 2010, the proportion of "arranged marriages," including those facilitated by marriage consultation agencies, has increased by 4.6 percentage points to reach 9.9%. It is expected that the demand for arranged marriages will continue to grow. A survey conducted by IBJ on its marriage consultation agency members in September 2022 revealed that the reasons for switching from other dating and marriage services to marriage consultation agencies included "lack of progress even after meeting someone" (22.1%), "dating but not leading to marriage" (21.5%), and "differences in seriousness and goals for marriage" (20.6%).

Characteristics of Users of IBJ Marriage Consultation Agencies



The proportion of individuals in their 20s joining the agencies has increased, particularly notable after the COVID-19 pandemic since 2020. Reasons for joining included "increase in acquaintances getting married and feeling a sense of urgency due to age" (34.7%), "lack of results from matchmaking apps and marriage parties" (23.7%), and "increased desire for marriage due to the pandemic" (15.3%). While matchmaking services offer convenience and ease of use, there is also a certain percentage of users who seek support after the matching process. Therefore, rather than being competitors, matchmaking services and marriage consultation agencies should work together in a cooperative relationship to provide support tailored to the needs of individuals.

Relationship between Age and Successful Marriage

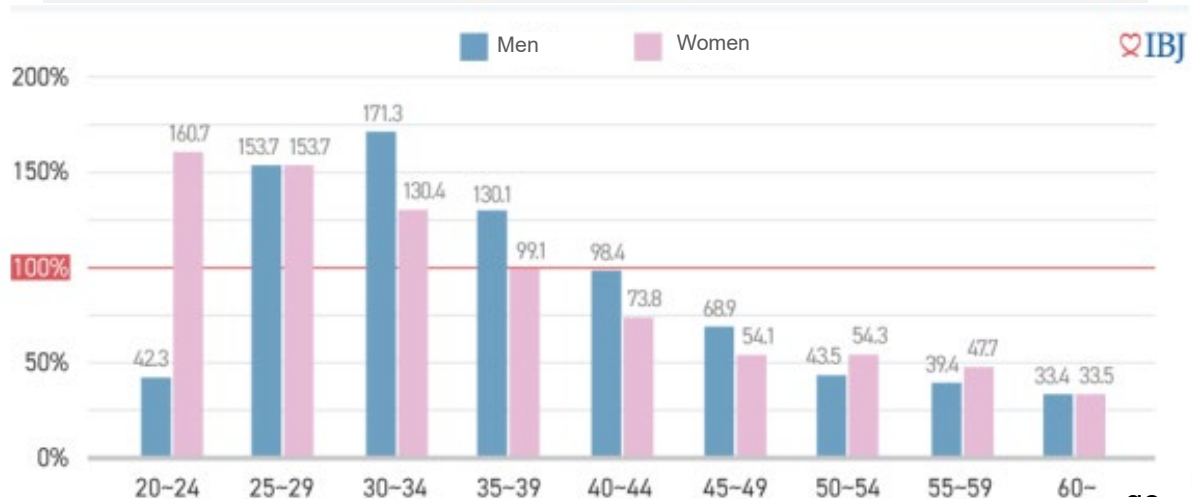
Omiai refers to a meeting place where individuals seek potential partners for marriage, with the intention of starting a relationship leading to marriage. When an omiai is successful, a relationship begins, eventually leading to marriage.

Comparison of "number of activity days" and "number of matchmaking meetings" by age group (median)

	Man				Woman			
	20-24	25-29	30-34	35-39	20-24	25-29	30-34	35-39
number of activity days	176.5	211.0	252.0	309.0	171.5	181.0	217.0	246.0
number of matchmaking meetings	4.5	7.0	10.0	12.0	6.0	8.0	9.0	10.0

When comparing the "number of activities at marriage consultation agencies" and the "number of omiai" by age among those who successfully married, it can be observed that both men and women who are younger have reached marriage with fewer omiai meetings. In particular, individuals in their 20s made the decision to marry after less than 10 omiai meetings and achieved marriage within 7 months. In comparison to those who withdrew from the agency without finding a spouse, those who successfully married had participated in more than twice as many omiai meetings, highlighting the importance of "meeting the potential partner" through omiai in order to succeed in marriage. The number of successful omiai meetings, which serves as an indicator of successful marriage, exceeded 600,000 in 2022, showing a 45% increase compared to 2018 and contributing to the overall increase in the number of successful marriages.

Age and "likelihood of successful marriage" - nationwide -



*The numerator represents the proportion of each age group among successful marriages, while the denominator represents the proportion of each age group among active members (100% represents the average).

As for age groups that are more likely to lead to successful marriages, the "20-29 age range" for women and the "25-34 age range" for men are considered the prime zones. As women get older, it becomes more difficult for them to find success in marriage, and after the age of 35, the success rate falls below 100%. On the other hand, for men, the success rate falls below 100% after the age of 40, indicating that both men and women face increasing difficulties in achieving successful marriages as they get older.

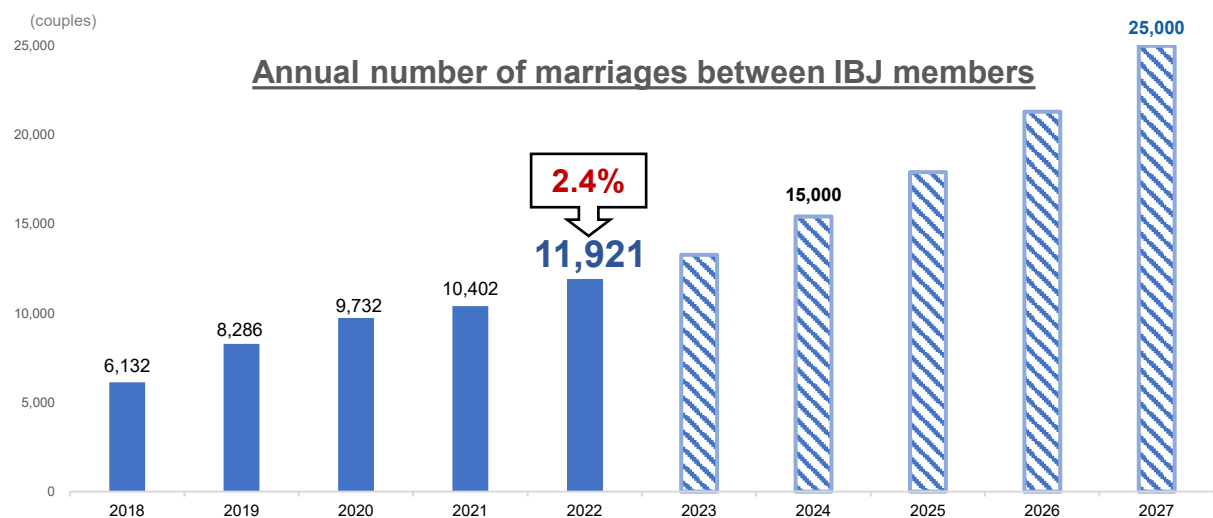
Especially for women, this trend becomes more pronounced depending on their age group, highlighting the need to strengthen support for young generations in their marriage activities.

Characteristics of Successful Marriages and Withdrawals

Comparison between successful applicants and those who withdrew (median)				
	Those who achieved marriage and withdrew		Those who withdrew without achieving marriage (withdrawn members)	
	Man	Woman	Man	Woman
Age	37.0	34.0	41.0	36.0
Number of activity days	303.0	242.0	379.0	339.0
Number of applications	42.0	25.0	28.0	14.0
Number of requests	38.0	82.0	5.0	51.0
Number of matchmaking meetings	11.0	10.0	2.0	4.0
Dating number	5.0	4.0	1.0	1.0
Dating days	123.0	124.0	-	-
Annual income	600-700	-	500-600	-

When comparing successful marriages and withdrawals (median), it is found that successful men have participated in +9 more matchmaking meetings, while successful women have participated in +6 more meetings. This means that successful men have attended matchmaking meetings 5.5 times more than men who withdrew, while successful women have attended 2.5 times more meetings than women who withdrew. The number of "applications" made by members themselves to members of the opposite sex for matchmaking meetings shows their proactive attitude, with successful men making +14 applications and successful women making +11 applications. The "transition rate from matchmaking to dating (number of dating relationships ÷ number of matchmaking meetings)" is 45.5% for successful men and 50% for men who withdrew, indicating no significant variation. However, successful women have a transition rate of 40%, while women who withdrew have a rate of 25%, suggesting that the high hurdle towards members of the opposite sex is one contributing factor. When comparing the characteristics of successful marriages and withdrawals, various factors become apparent, but overall, increasing the number of matchmaking meetings and showing proactive behavior are necessary to achieve successful marriages in a short period.

Importance of IBJ



As mentioned earlier, Japan is currently facing an unprecedented domestic crisis of population decline and aging society. Since its establishment, IBJ has considered increasing the number of successful couples as its social mission to counteract the declining birth rate. IBJ is a marriage agency

that boasts the highest marriage success rate (50%) in the industry and offers a variety of marriage services, such as the first matching app in Japan and a marriage agency platform that brings together agencies from all over the country. Through these efforts, IBJ has steadily increased the number of successful couples and created 11,921 couples in 2022.

This figure accounts for 2.4% of the total number of successful couples created nationwide (2022: 507,211 couples), indicating that one out of every 50 successful couples in Japan is created through IBJ. IBJ is the only private company that has produced such a large number of successful couples, and it will continue to tackle Japan's declining birth rate problem as a representative of the private sector.