



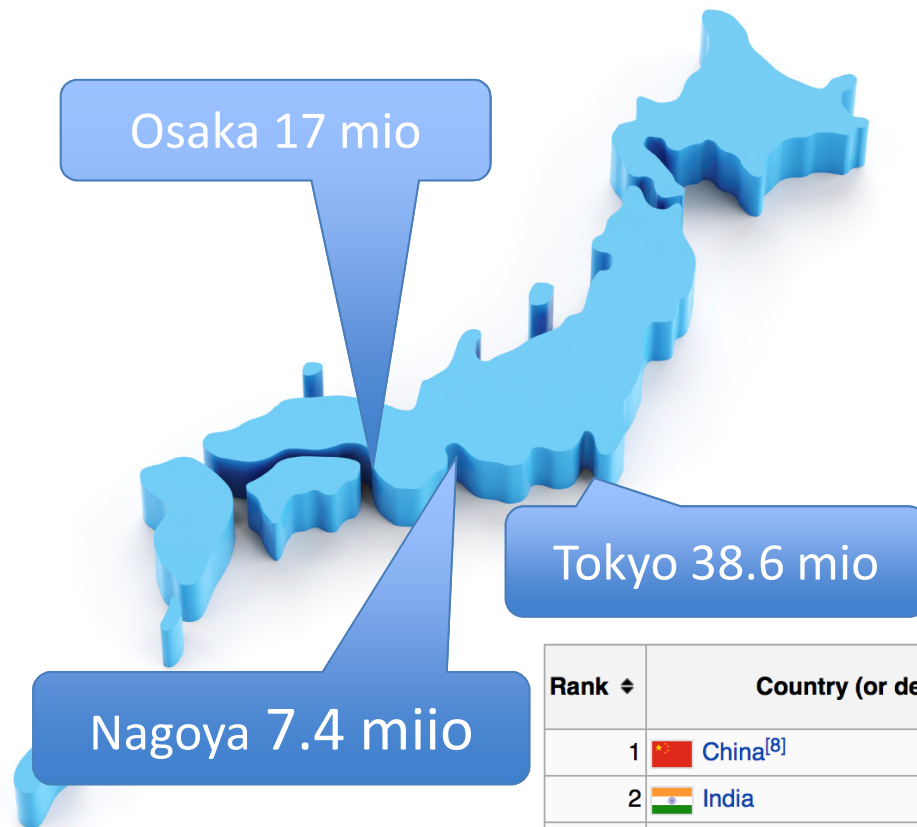
EUROPEAN UNION
European Regional Development Fund

Japanese tourism trend and potential for Baltics & South Coast of Finland











Shigeyoshi Noto
Foresight Marketing



Geography



- GDP: World No.3, 4.58 trillion € (8.2% of world GDP)
- 128 mio population,
- 10th biggest population in the world
- 3 metropolitan areas (Tokyo metropolitan area is No.1 in the world)
- 11 cities more than 1mio population

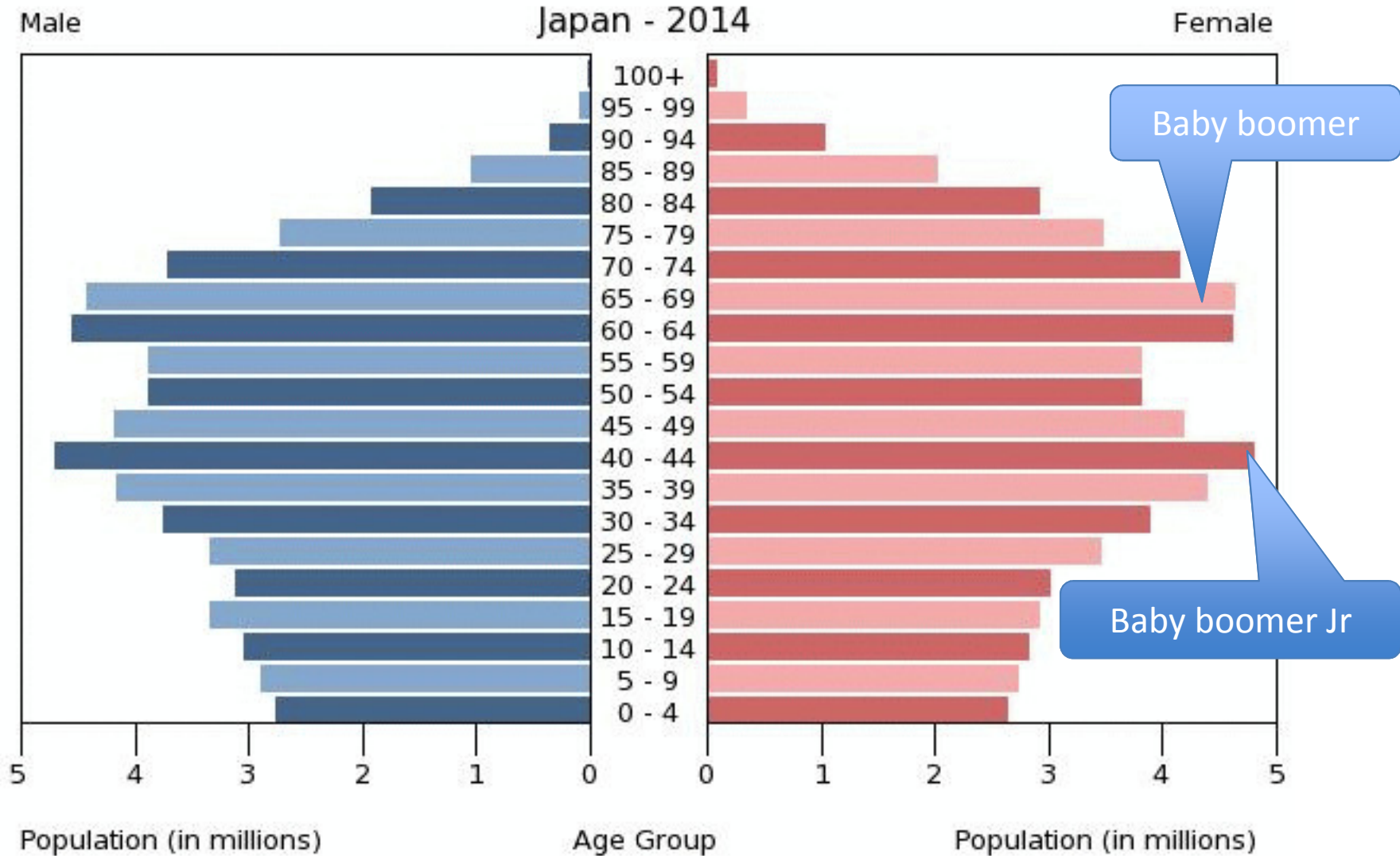
Rank ↕	Country (or dependent territory) ↕	Population ↕	Date ↕	% of world population ↕
1	 China ^[8]	1,367,960,000	February 1, 2015	18.9%
2	 India	1,266,240,000	February 1, 2015	17.5%
3	 United States	320,307,000	February 1, 2015	4.44%
4	 Indonesia	255,461,700	July 1, 2015	3.54%
5	 Brazil	203,817,000	February 1, 2015	2.82%
6	 Pakistan	188,848,000	February 1, 2015	2.61%
7	 Nigeria	183,523,000	July 1, 2015	2.54%
8	 Bangladesh	157,756,000	February 1, 2015	2.18%
9	 Russia ^[9]	146,270,033	January 1, 2015	2.03%
10	 Japan	127,020,000	January 1, 2015	1.76%

Demography

Average longevity: 80.21

66% live in urban area

Birth rate per couple: 1.2



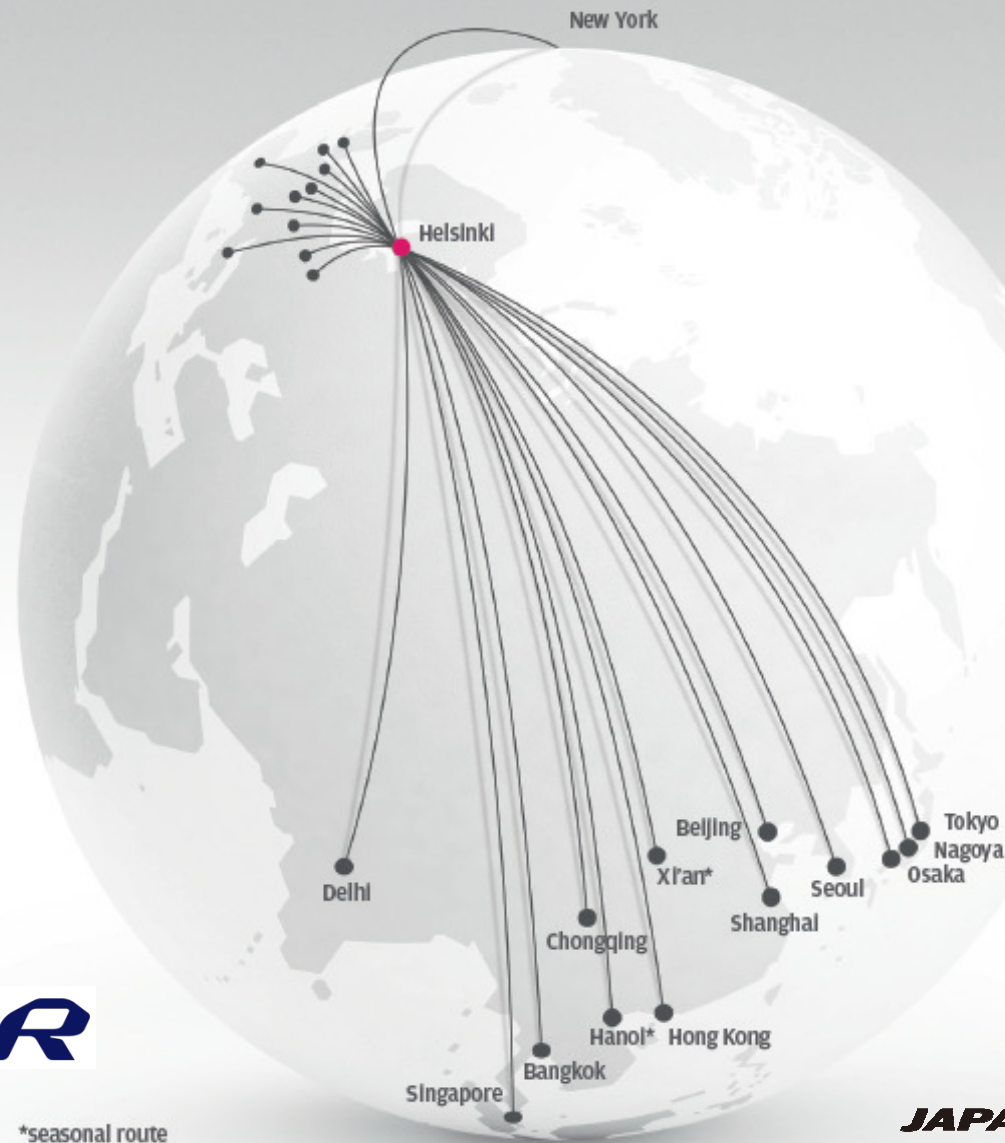
31 weekly flights from Japan

The **shortcut** between Asia and Europe

Flying via Helsinki means the geographically shortest route, smooth and uncongested transits, and straighter flights that generate fewer emissions.

FINNAIR

*seasonal route



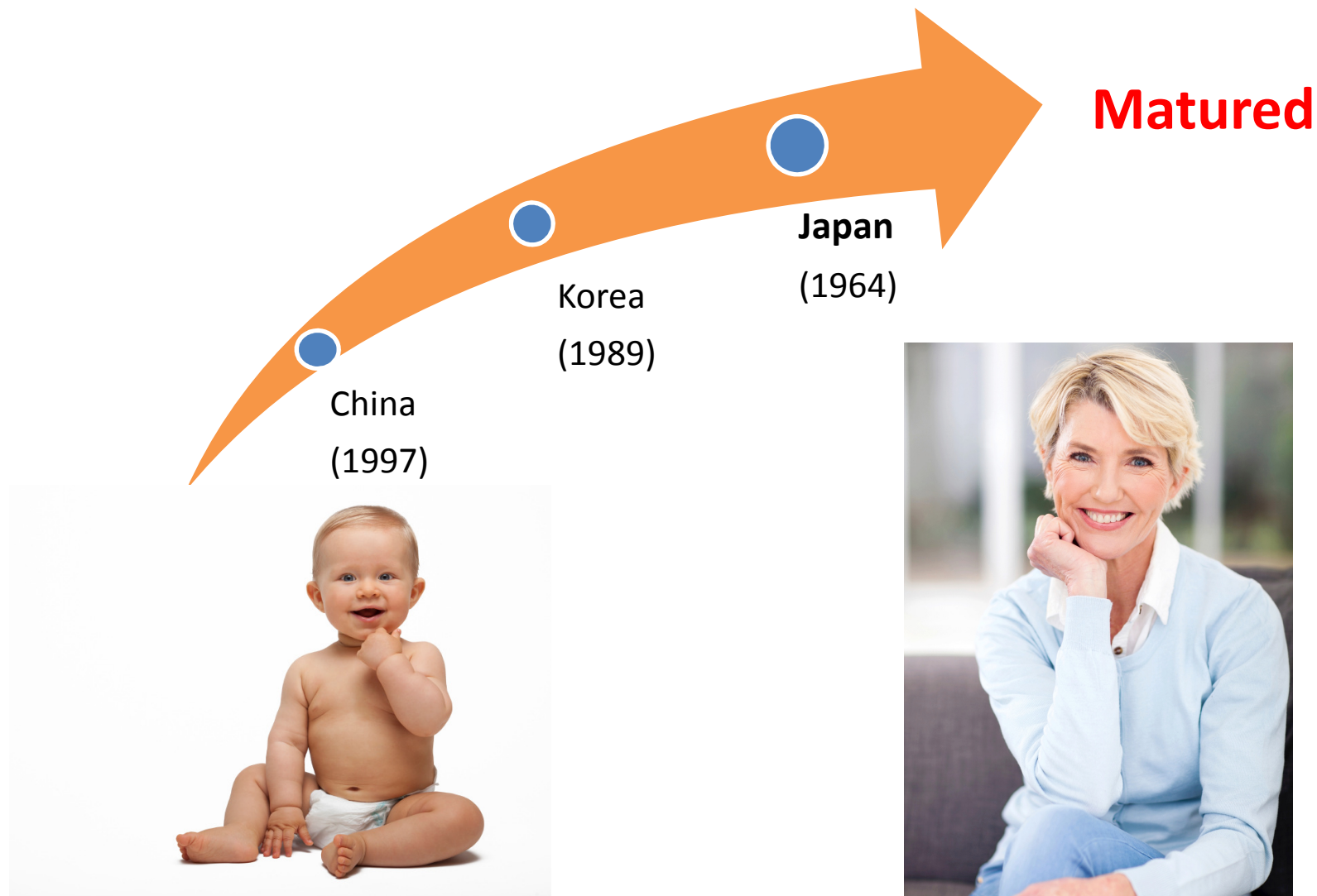
JAPAN AIRLINES

A top-down view of various vintage travel items arranged on a rustic wooden surface. In the center is an open, blank notebook with lined pages. To the top left is a silver and black vintage camera. Above the notebook is a round compass with a black casing and a red needle, resting on a red ruler. To the right is a red passport with a gold eagle emblem and the word 'PASSPORT' in red. Below the notebook is a brass pocket watch with a chain. To the left is a small map showing various locations. To the right is a brass telescope.

Japanese outbound traveling

The difference between 2 Asian markets

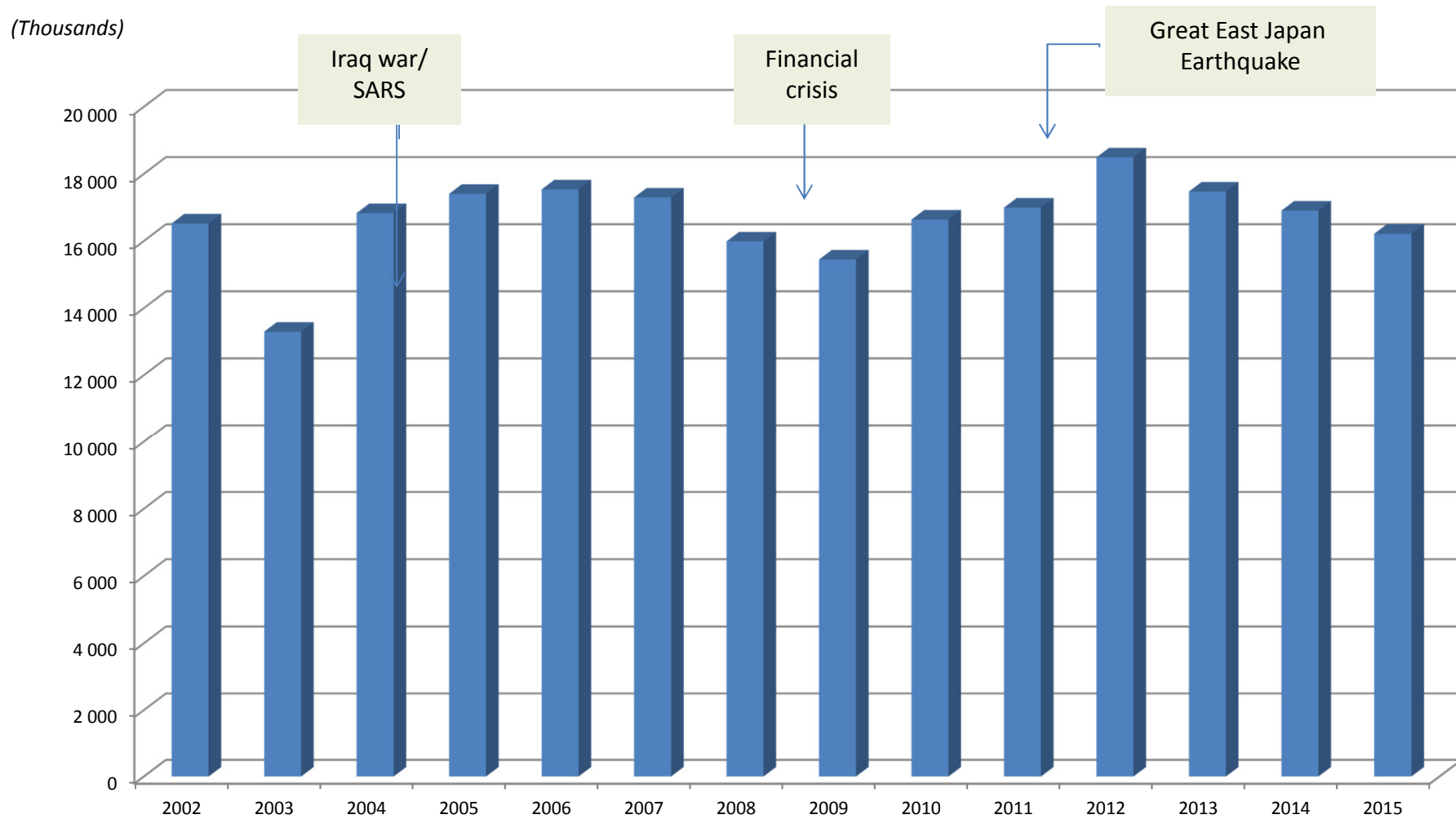
The year of liberalization of overseas traveling



Dawn of Japanese overseas traveling 1964

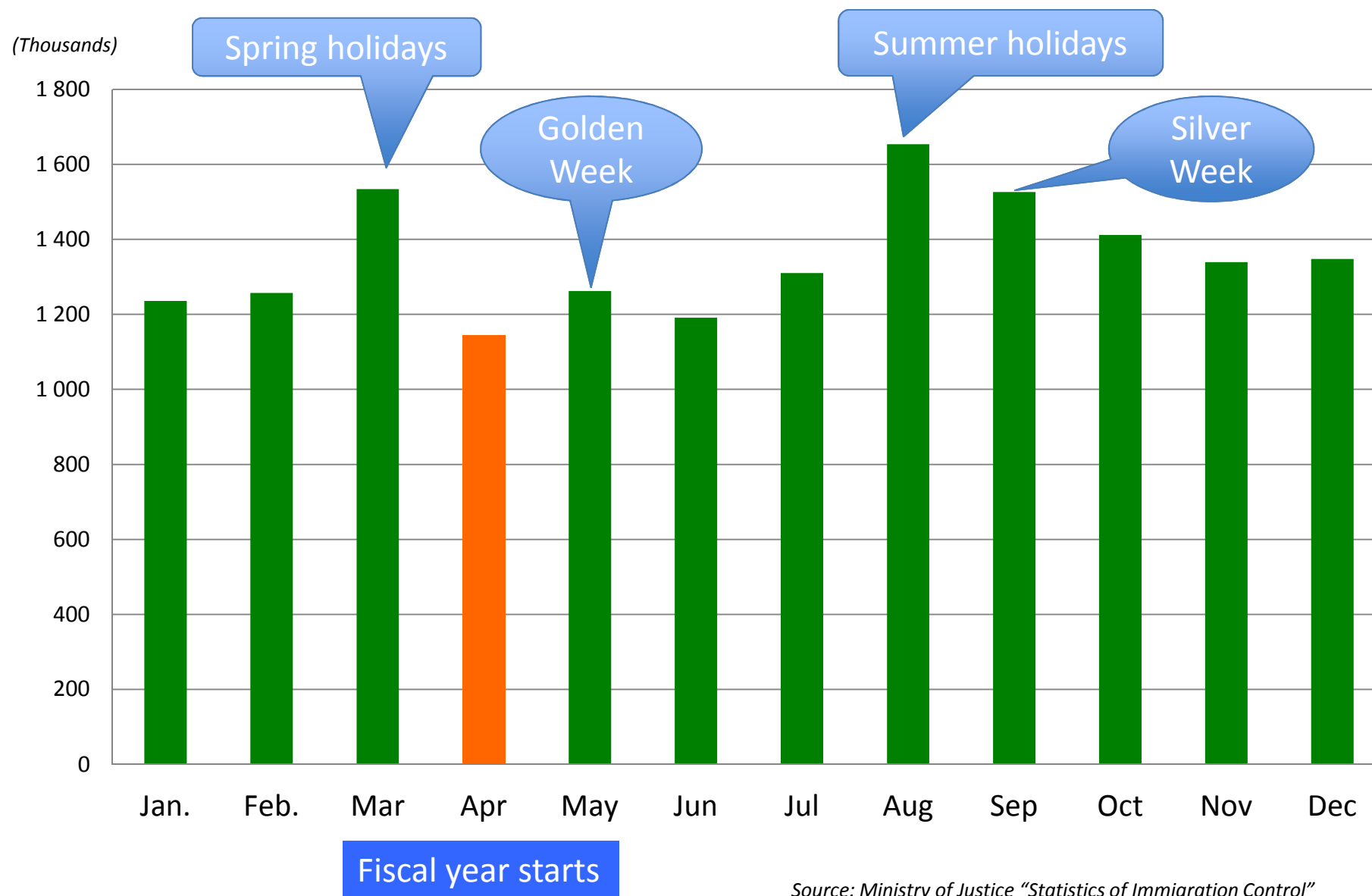


The number of Japanese travelling abroad



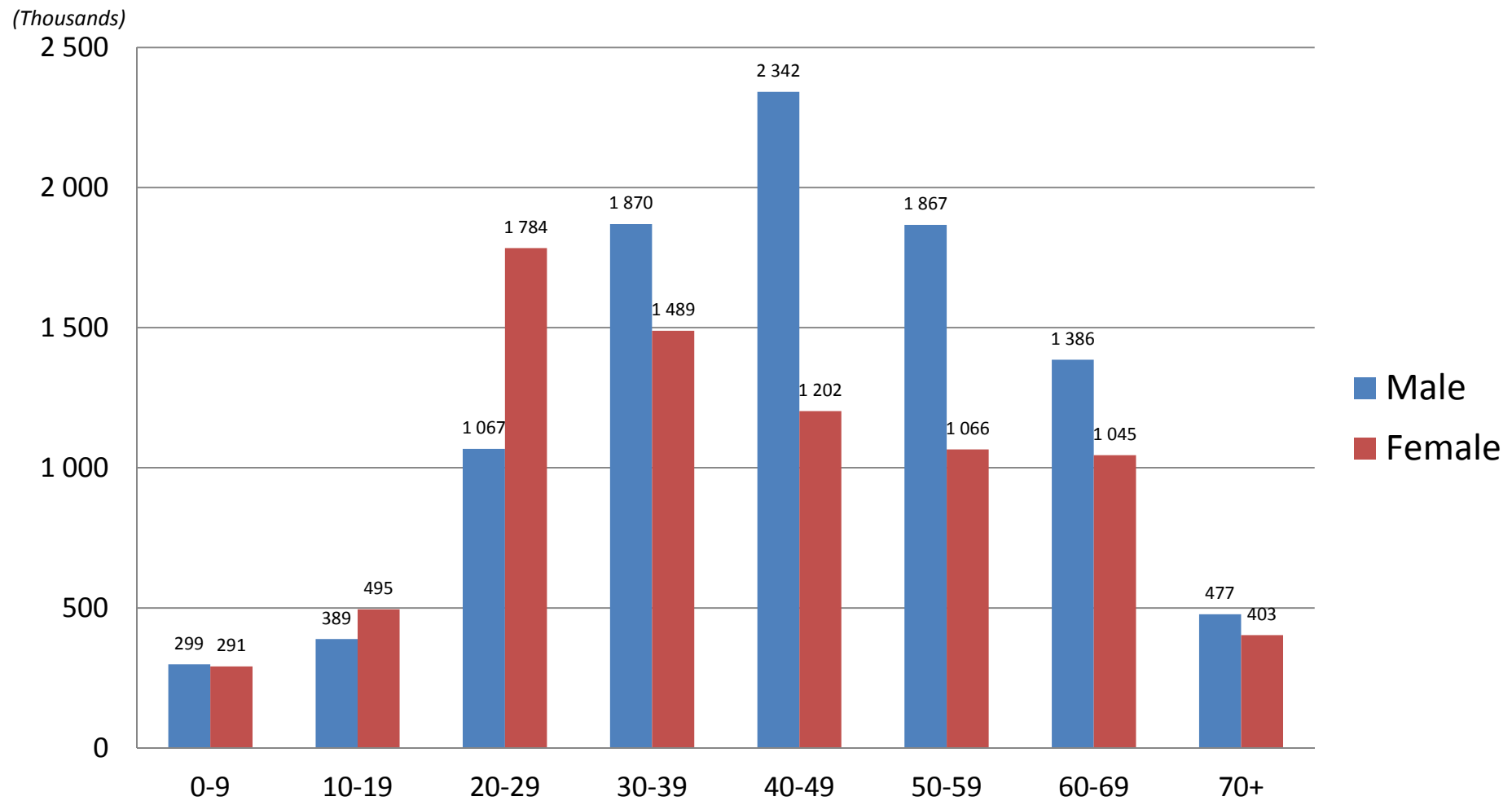
Source: Ministry of Justice "Statistics of Immigration Control"

Number of Overseas Travelers by Month



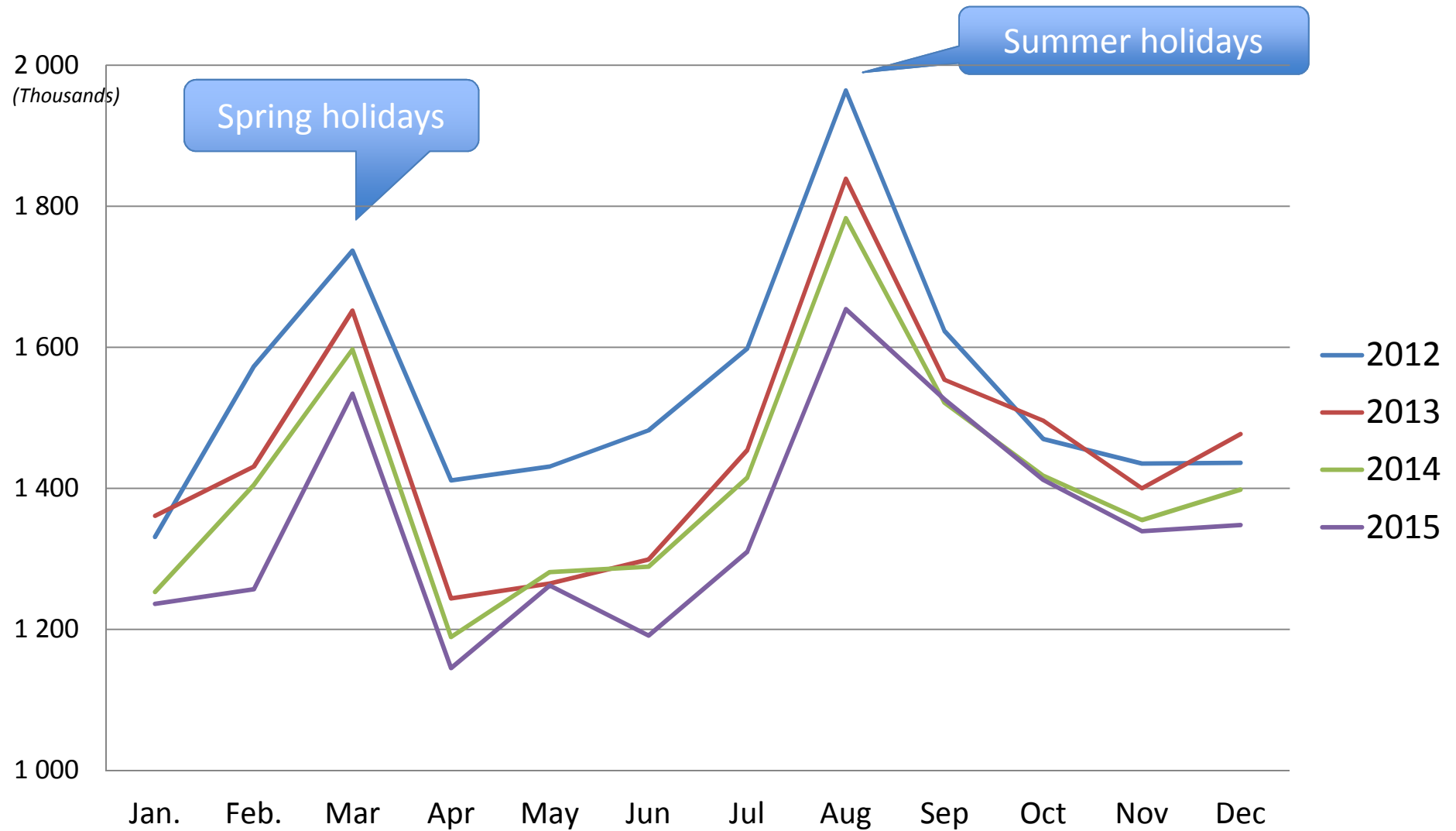
Source: Ministry of Justice "Statistics of Immigration Control"

Numbers of Overseas Travelers by Gender and Age Group (2013)



Source: Ministry of Justice "Statistics of Immigration Control"

Number of Overseas Travelers by Month



Source: Ministry of Justice "Statistics of Immigration Control"

2017 Calendar

1							2							3						
日	月	火	水	木	金	土	日	月	火	水	木	金	土	日	月	火	水	木	金	土
1	2	3	4	5	6	7				1	2	3	4				1	2	3	4
8	9	10	11	12	13	14	5	6	7	8	9	10	11	5	6	7	8	9	10	11
15	16	17	18	19	20	21	12	13	14	15	16	17	18	12	13	14	15	16	17	18
22	23	24	25	26	27	28	19	20	21	22	23	24	25	19	20	21	22	23	24	25
29	30	31					26	27	28					26	27	28	29	30	31	
4							5							6						
日	月	火	水	木	金	土	日	月	火	水	木	金	土	日	月	火	水	木	金	土
						1			1	2	3	4	5	6				1	2	3
2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10
9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17
16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24
23	24	25	26	27	28	29	28	29	30	31				25	26	27	28	29	30	
30																				
7							8							9						
日	月	火	水	木	金	土	日	月	火	水	木	金	土	日	月	火	水	木	金	土
						1				1	2	3	4	5					1	2
2	3	4	5	6	7	8	6	7	8	9	10	11	12	3	4	5	6	7	8	9
9	10	11	12	13	14	15	13	14	15	16	17	18	19	10	11	12	13	14	15	16
16	17	18	19	20	21	22	20	21	22	23	24	25	26	17	18	19	20	21	22	23
23	24	25	26	27	28	29	27	28	29	30	31			24	25	26	27	28	29	30
30	31																			
10							11							12						
日	月	火	水	木	金	土	日	月	火	水	木	金	土	日	月	火	水	木	金	土
1	2	3	4	5	6	7					1	2	3	4					1	2
8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9
15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16
22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23
29	30	31					26	27	28	29	30			24	25	26	27	28	29	30
														31						

- Many national holidays
- Frequent long weekends
- Short holidays
- Less consumption of paid holidays

January



April



Golden Week

4 April

2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1 エイプリル・フール
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29 昭和の日
30	1	2	3	4	5	6

June-July



August



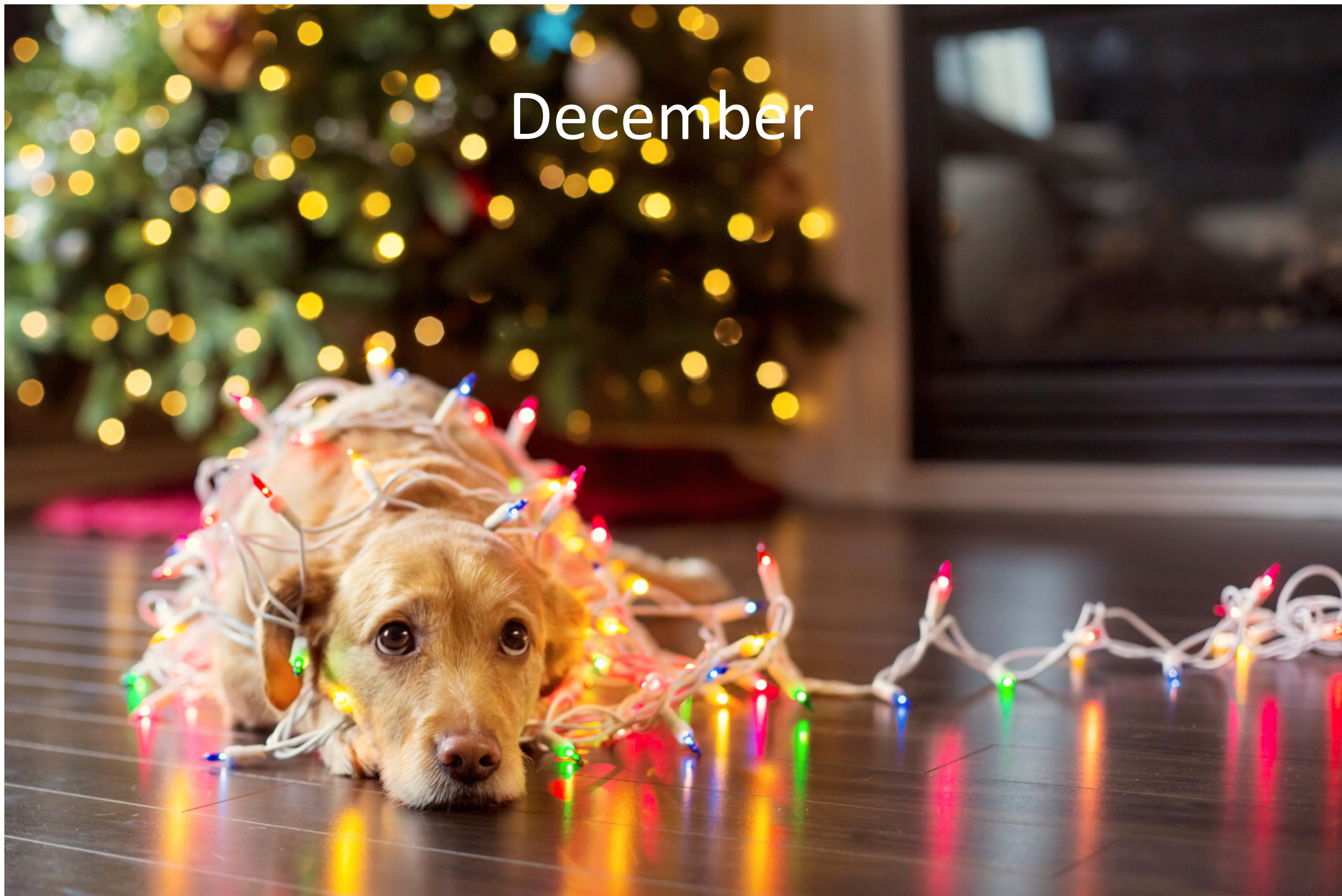
Silver Week

9 September

2017

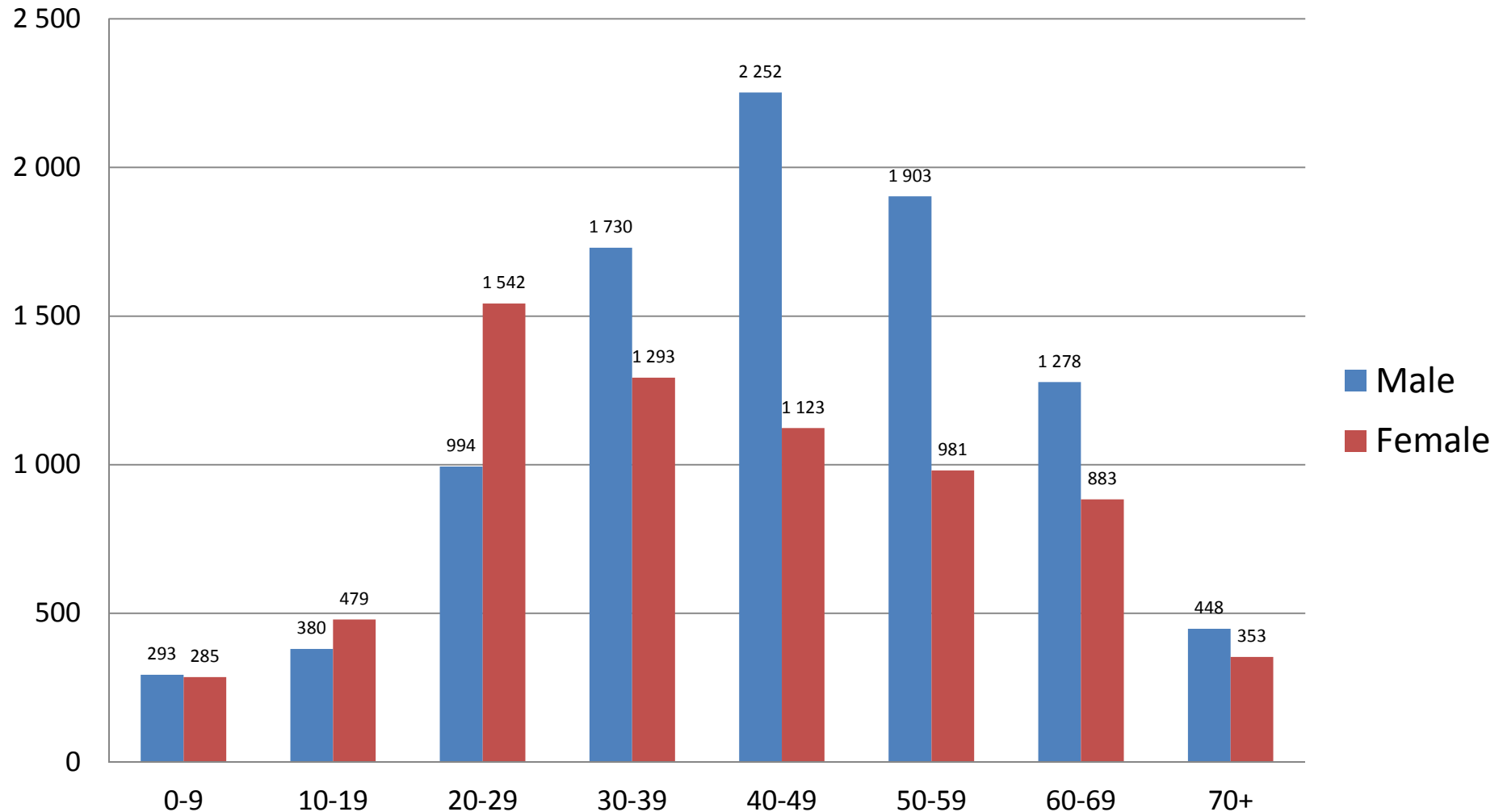
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18 敬老の日	19	20	21	22	23 秋分の日
24	25	26	27	28	29	30

December



Numbers of Overseas Travelers by Gender and Age Group (2015)

(Thousands)

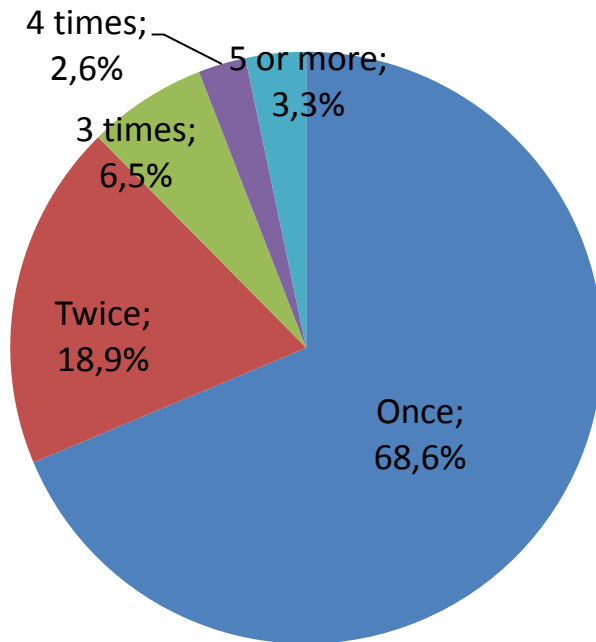


Source: Ministry of Justice "Statistics of Immigration Control"

Number of Overseas Trips Taken and Previous Travel Experience

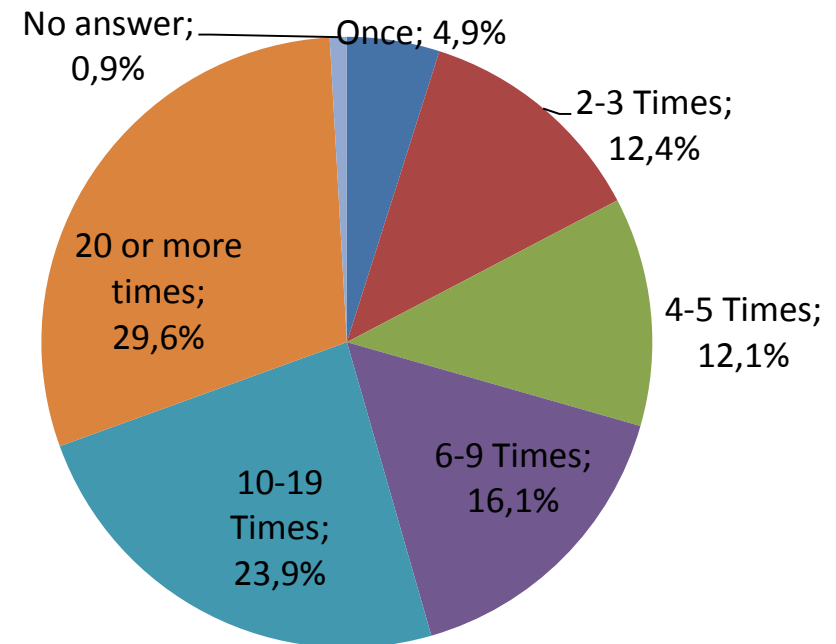
An average of 1.6 trips were taken by overseas travelers during the year 2015. The highest average number (2.0) was for middle-aged men, while the lowest (1.2) was for housewives.

Number of Overseas Trips in 2015



Average: 1.6 times in 2015

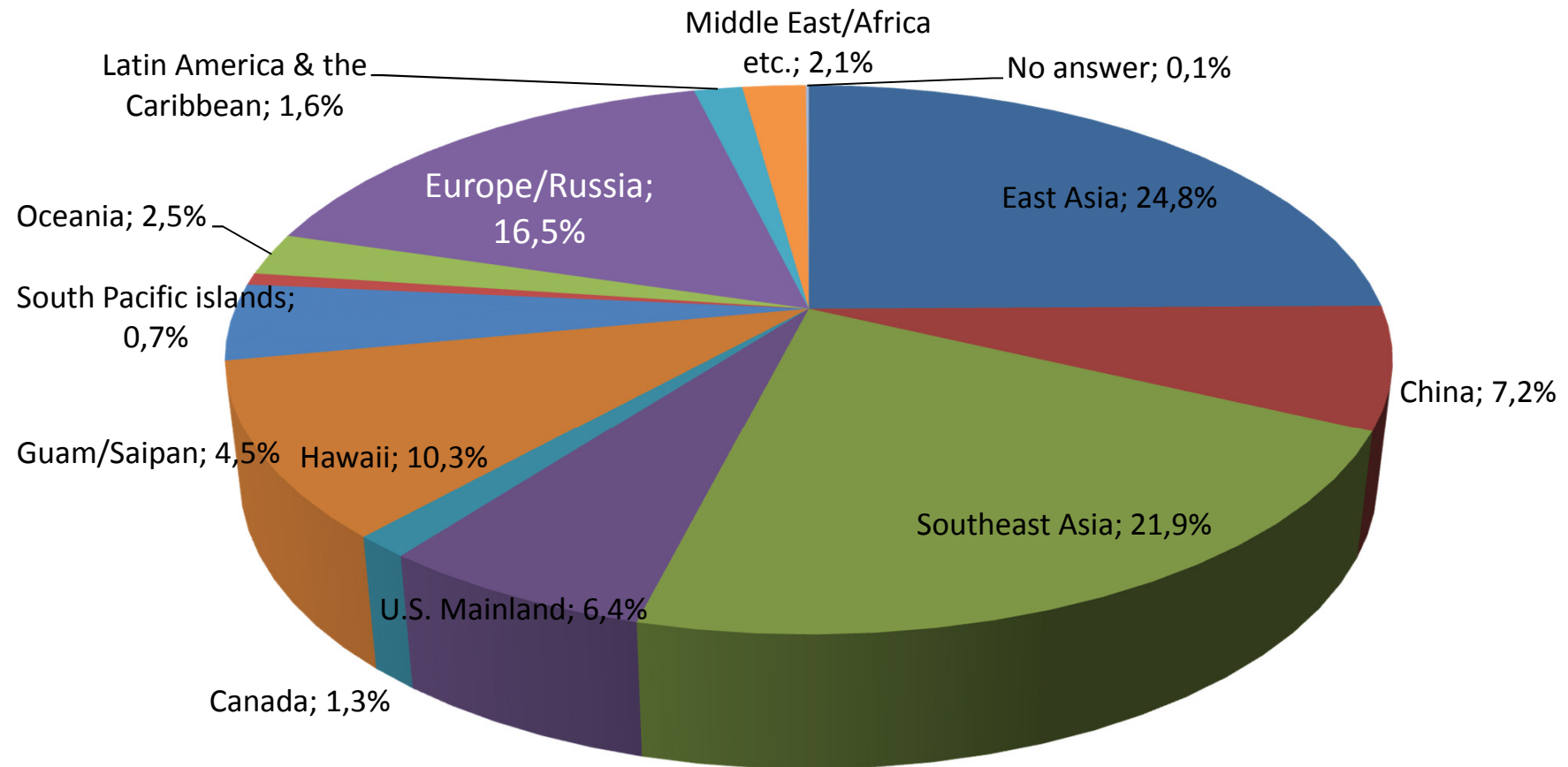
Previous Experience of Overseas Travel by Market Segment in 2015



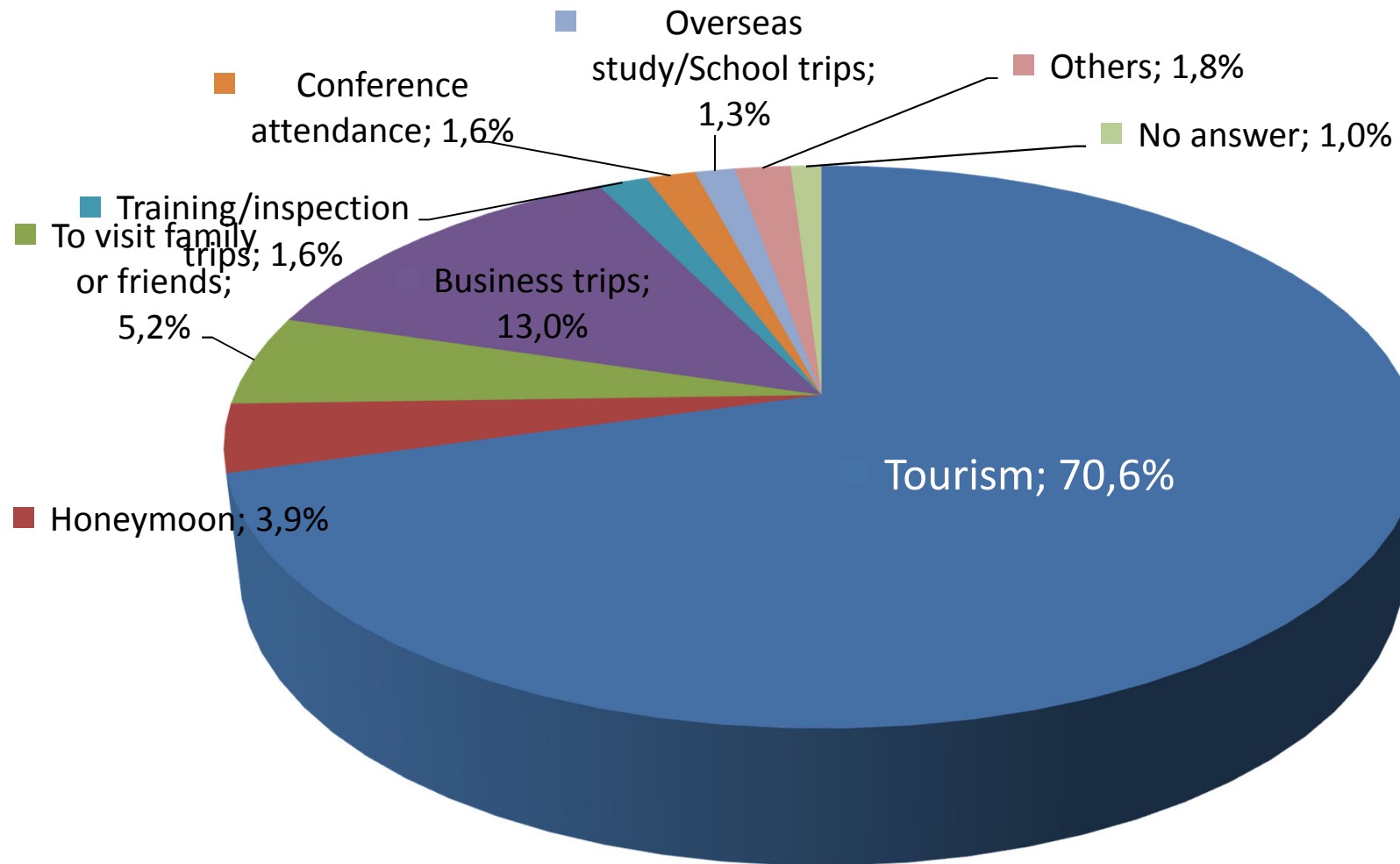
Average: 17.0 times

Source: JTB Tourism Research & Consulting Co. "Factual Survey of the Overseas Travel Situations"

Destinations by Market Segment



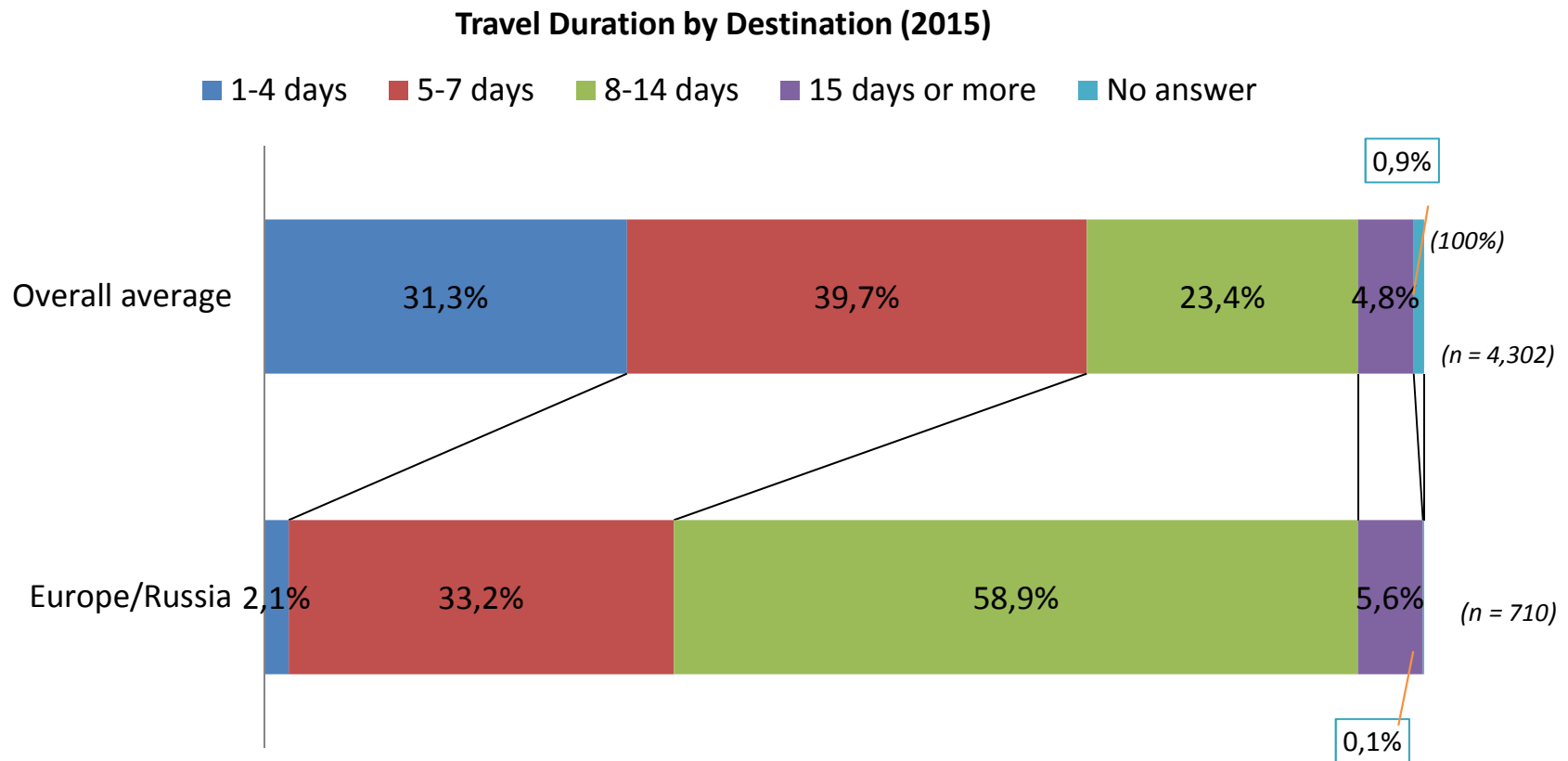
Purpose of Travel



Source: JTB Tourism Research & Consulting Co. "Factual Survey of the Overseas Travel Situations"

Travel Duration: Europe/Russia

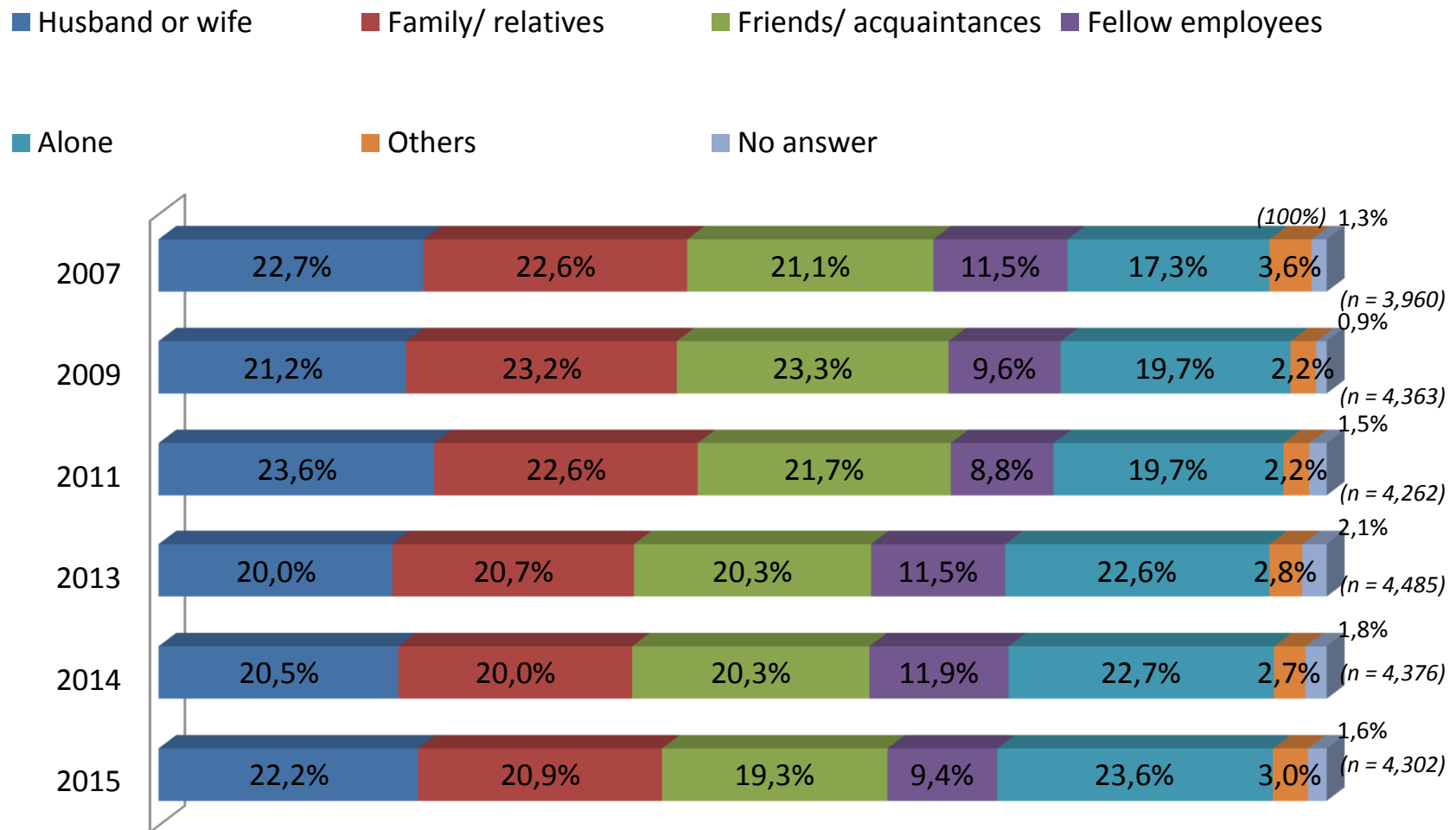
The proportion of trips lasting 1 to 4 days was again the highest in East Asia. For remoter destinations, such as Canada, Europe & Russia, Latin America, the Middle East & Africa, etc., over 60% lasted at least eight days.



Source: JTB Tourism Research & Consulting Co. "Factual Survey of the Overseas Travel Situations"

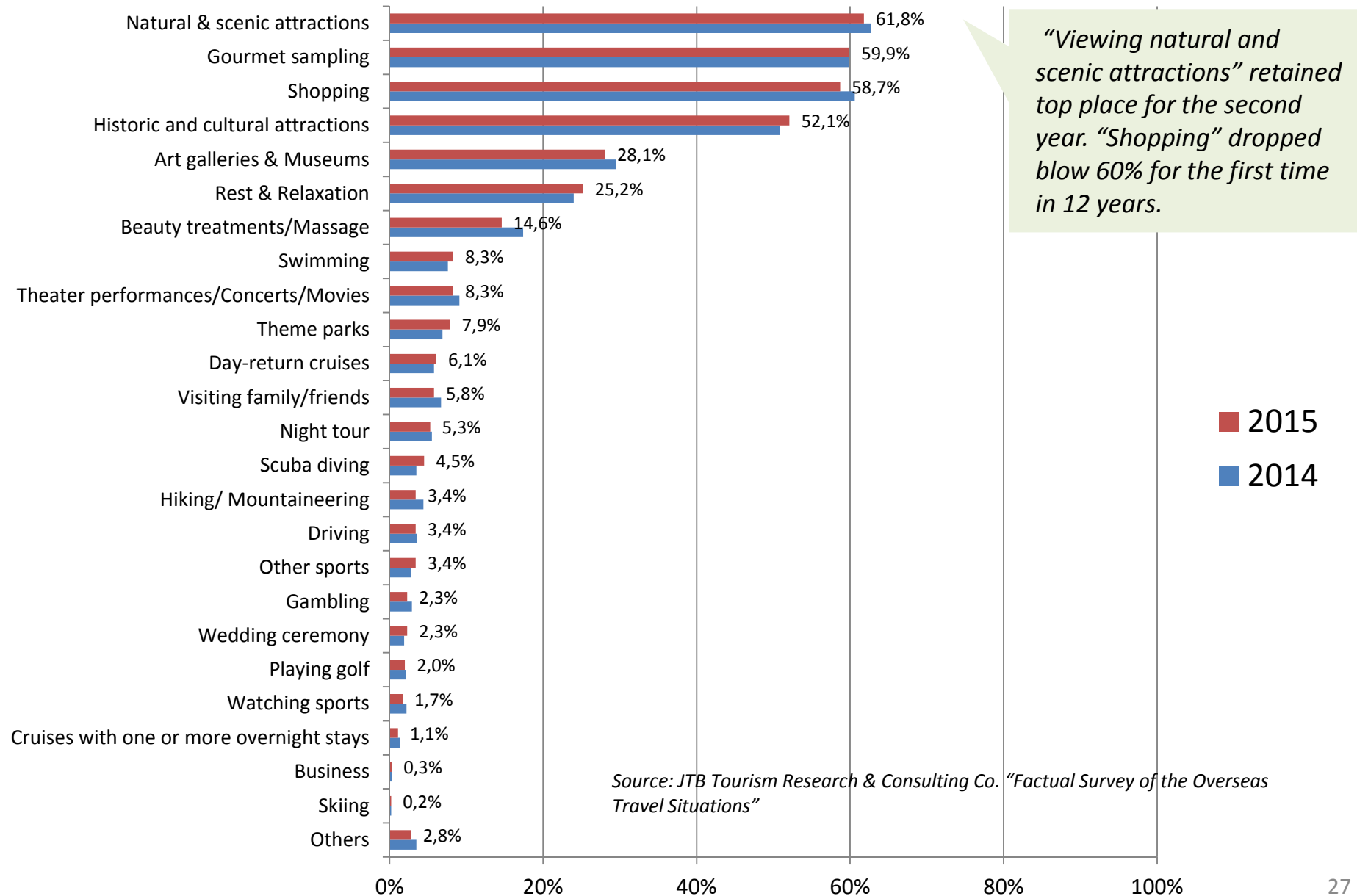
Travel Companions

Traveling alone continued to expand.



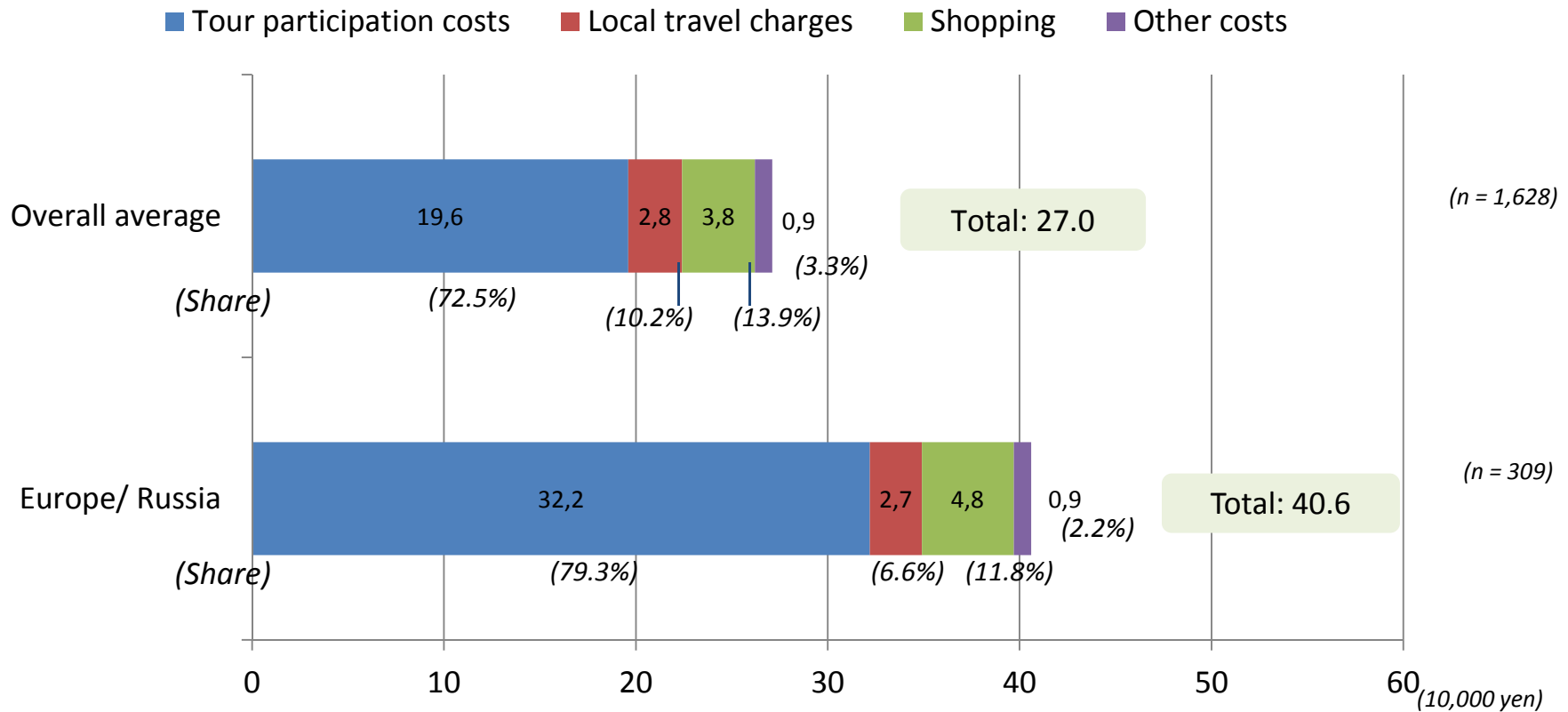
Source: JTB Tourism Research & Consulting Co. "Factual Survey of the Overseas Travel Situations"

Activities at Destinations

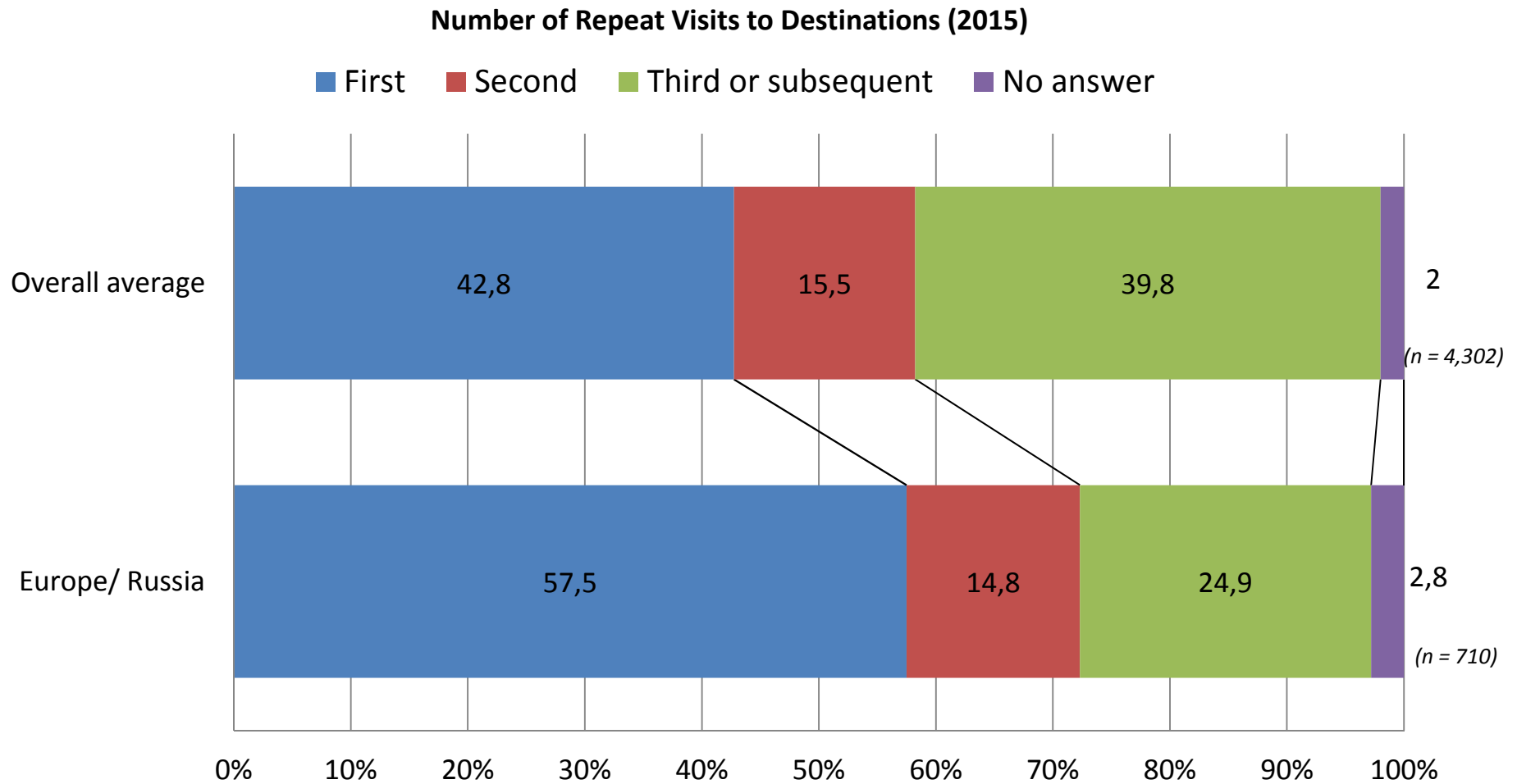


Travel Costs by Destination: Europe/Russia

Looking at the total expenditure of travelers who participated in package tours, they were the highest for trips to Latin America, at 660,000 yen. This was followed by other remote locations including Canada at 462,000 yen, the South Pacific Islands at 432,000 yen, and Europe & Russia at 406,000 yen. Tour costs generally declined as a percentage of total expenditure for all major destinations.

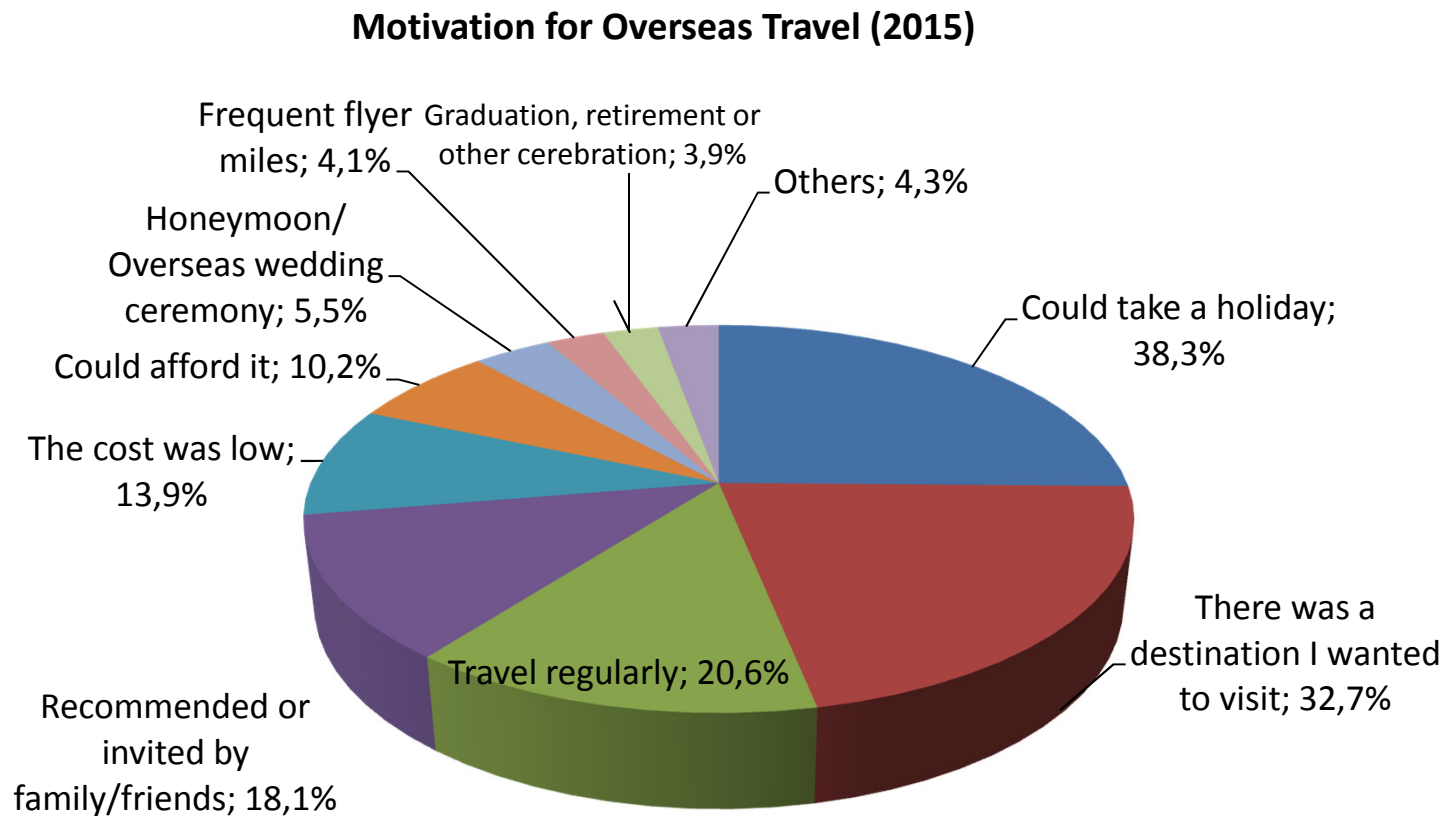


Destination and Repeat Travelers: Europe/Russia



Motivation for Overseas Travel

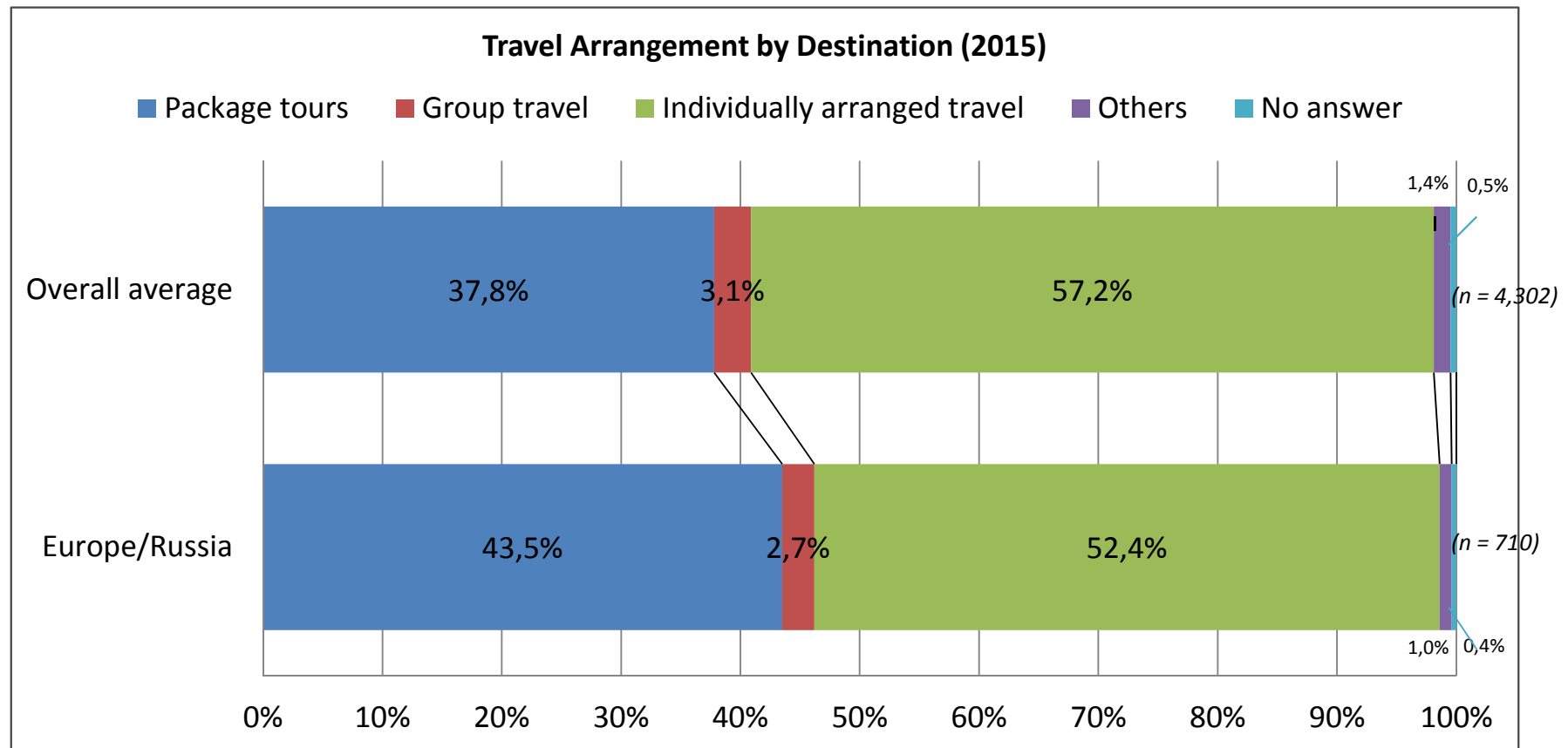
"There was a destination I wanted to visit" was important for the elderly, "Recommended or invited by family/friends" (common among women and younger segments) surged for female students



Source: JTB Tourism Research & Consulting Co. "Factual Survey of the Overseas Travel Situations"

Travel Arrangement by Destination: Europe/Russia

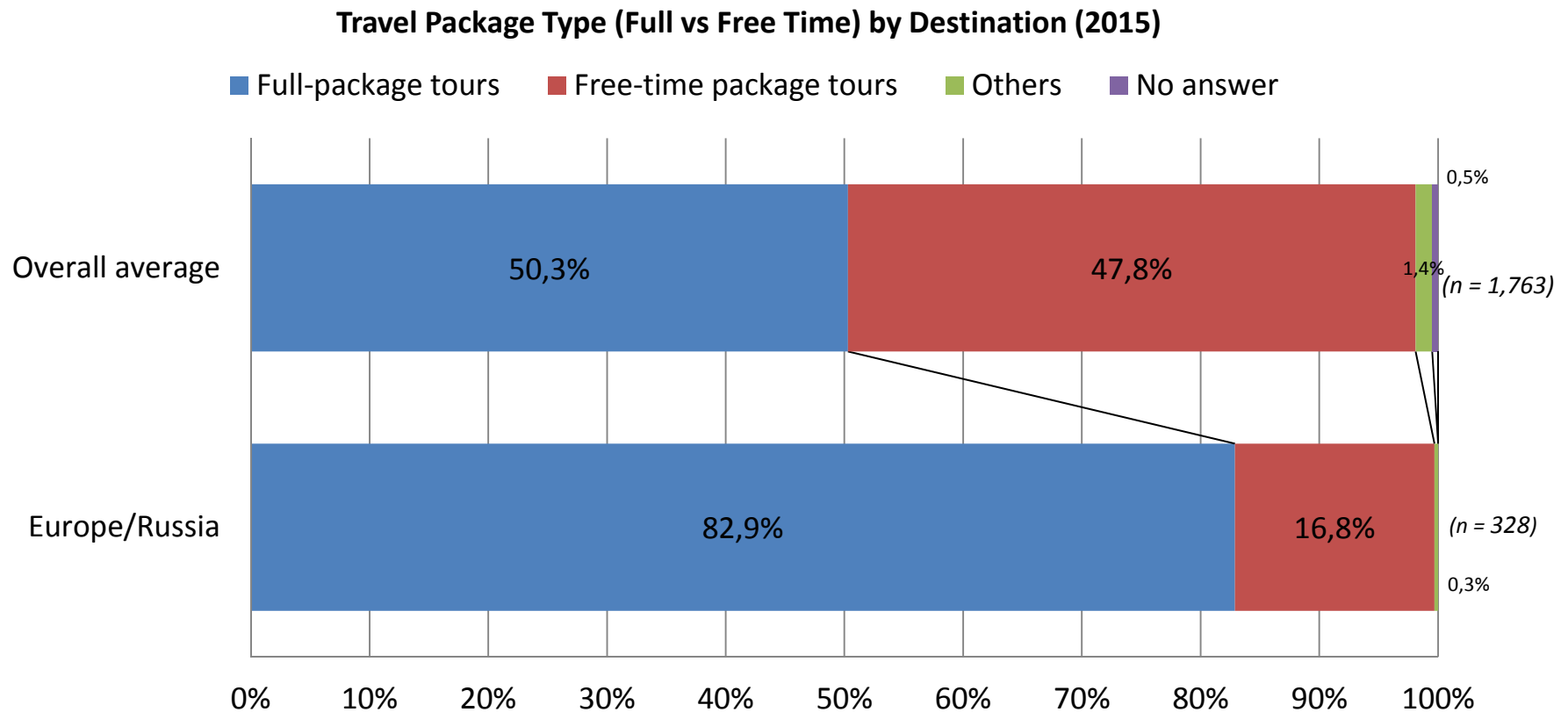
Package tour usage was high for both resort-type and touring destinations. The proportion of individually arranged travel did decline from the previous year (2014) and there was a noticeable increase in package-tour usage.



Source: Japan Tourism Marketing Co., "Factual Survey of the Overseas Travel Situation"

Travel Package Type by Destination: Europe/Russia

Full-package tours are for mainly touring destinations; free-time tours are popular for resort areas. In terms of their destinations, full-package tours for touring destinations headed the list in the Middle East & Africa, etc. and in Europe & Russia.

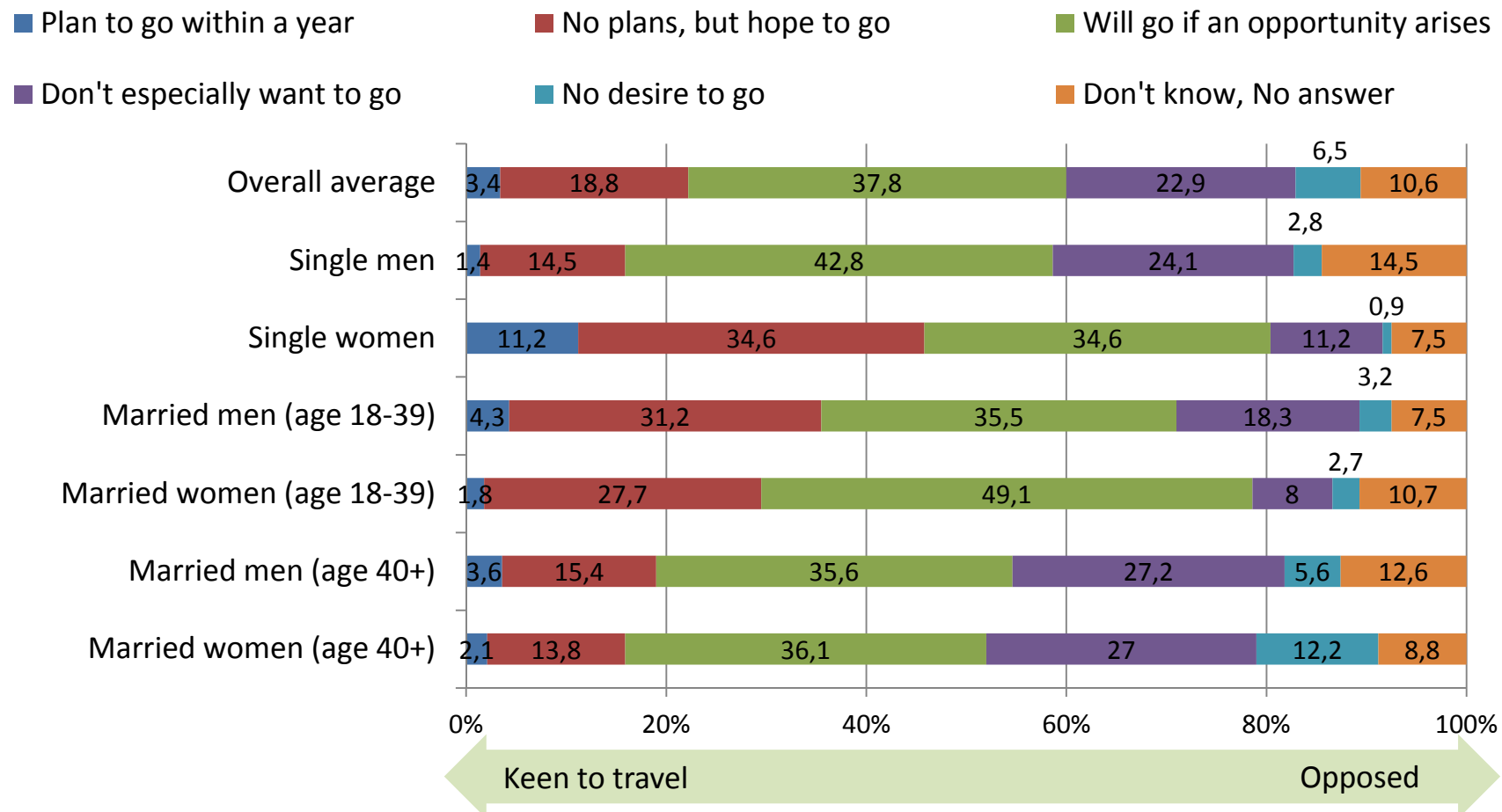


Source: Japan Tourism Marketing Co., "Factual Survey of the Overseas Travel Situation"

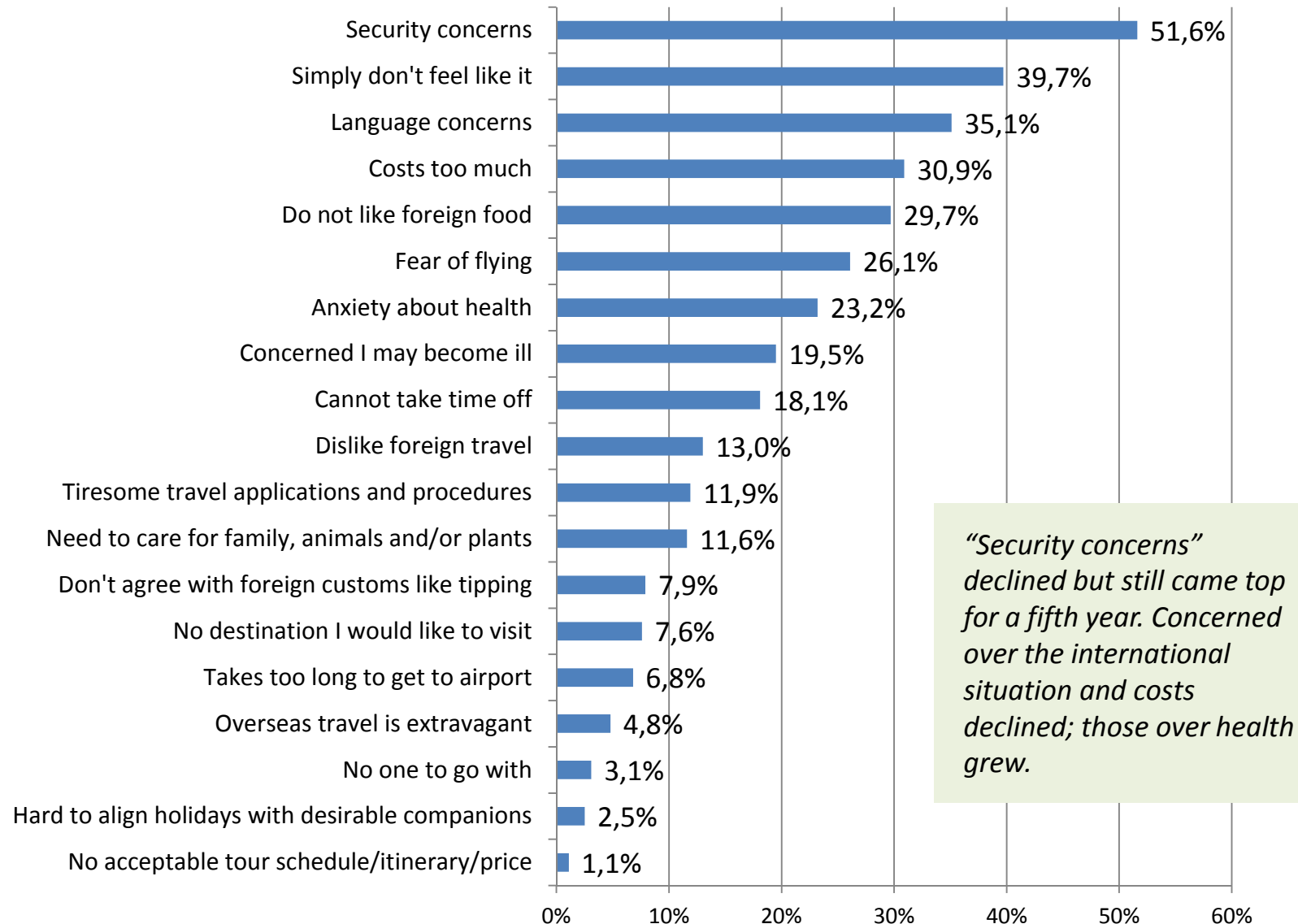
Desire to Travel Overseas by Gender, Age and Marital Status

All segments showed increasing desire to travel overseas, with single women keen to travel surging past 80%.

Source: JTB Tourism Research & Consulting Co. "Opinion Survey of Overseas Travel Preference"

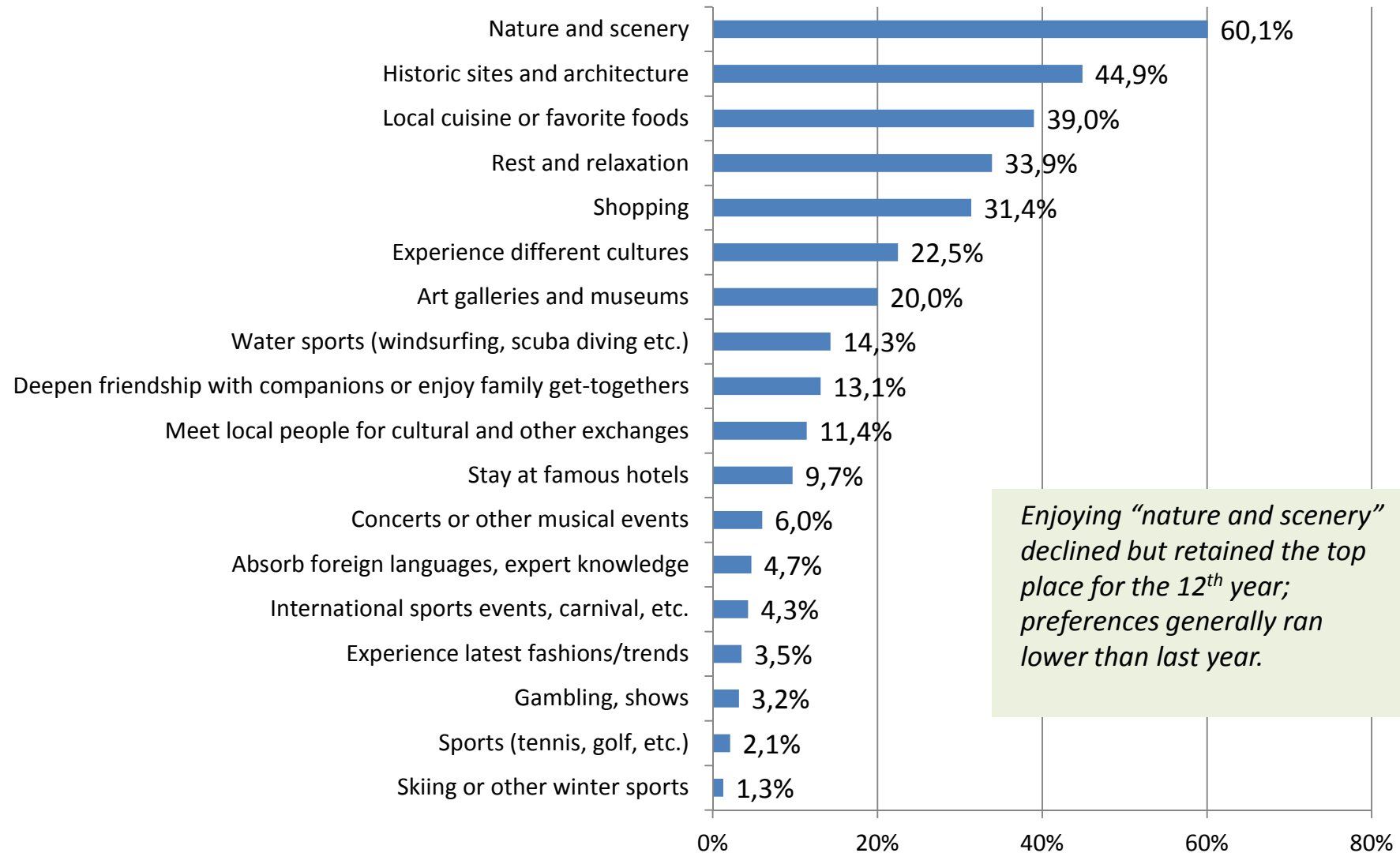


Factors Hindering Overseas Travel

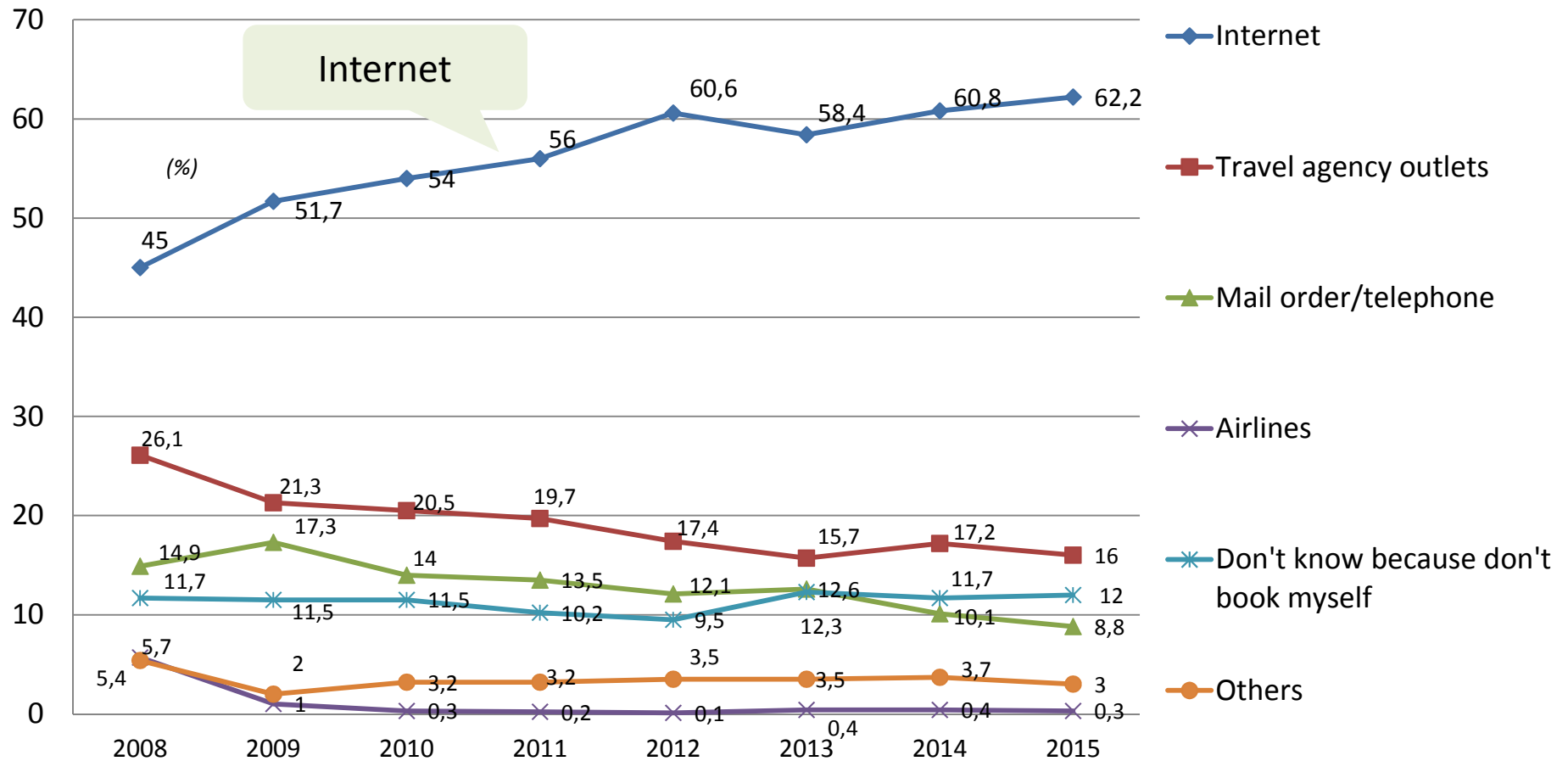


Source: JTB Tourism Research & Consulting Co. "Opinion Survey of Overseas Travel Preference"

Preferred Purpose of Travel



Travel Reservation Methods

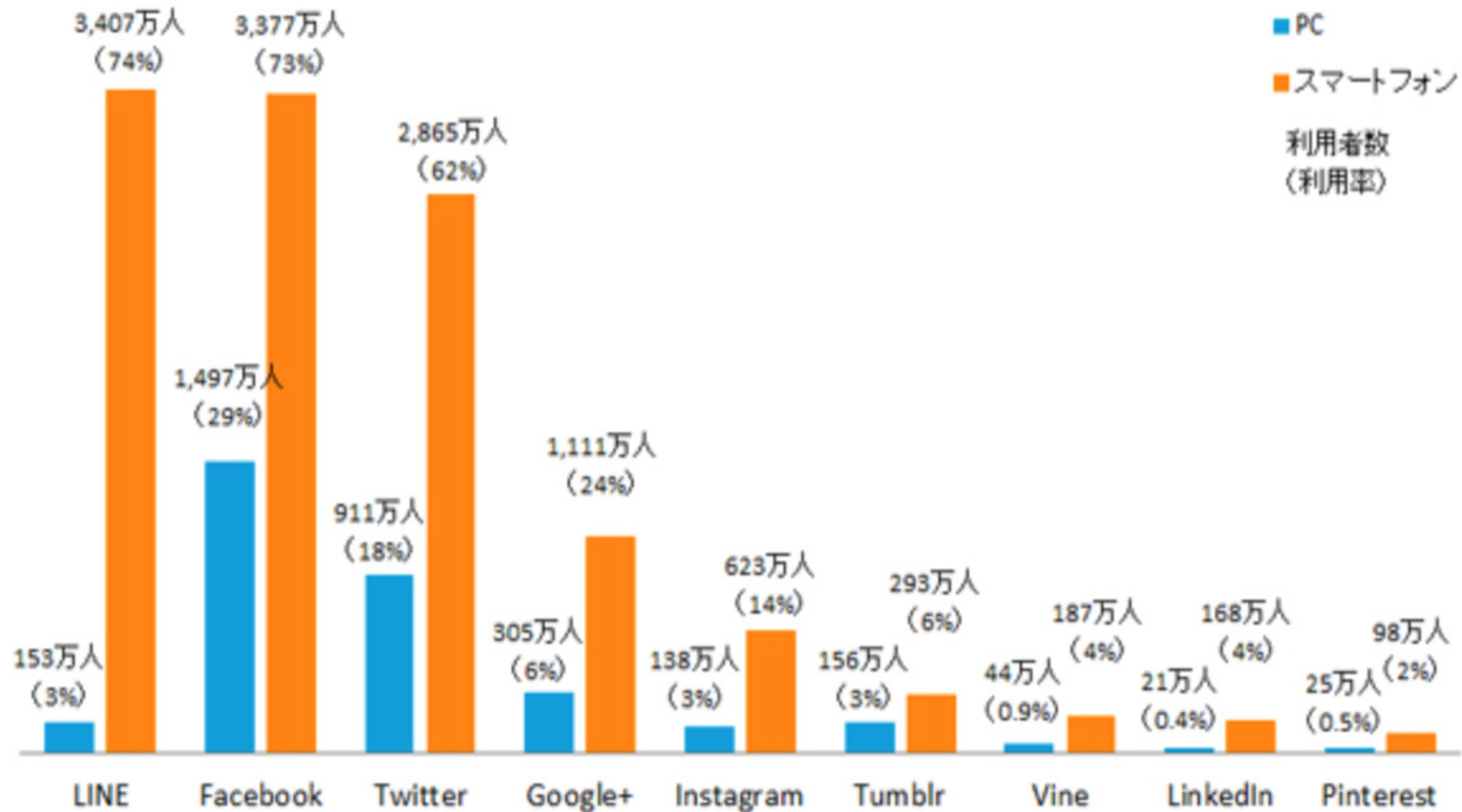


Source: Japan Tourism Marketing Co., "Factual Survey of the Overseas Travel Situation"

Desired destinations

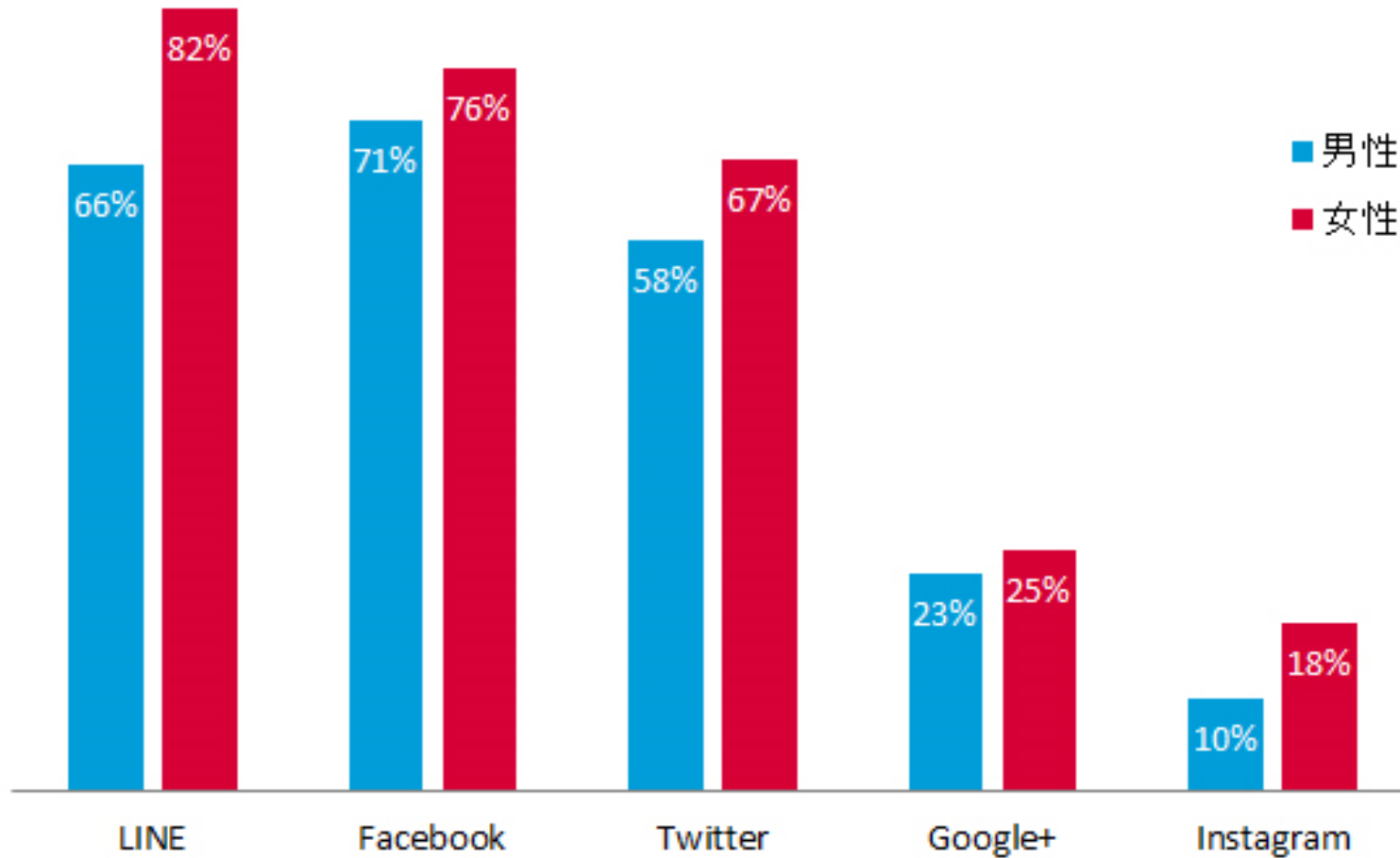
Ranking	2015	2016
1	Hawaii	Hawaii
2	Italy	Australia
3	France	Italy
4	Australia	France
5	Guam	Guam/UK
6	UK	Guam/UK
7	Switzerland	Germany
8	Germany	Switzerland
9	Spain	Singapore
10	Canada	Spain
	18, Scandinavia & Finland	Out of ranking : Scandinavia & Finland

SNS in Japan Jan, 2016

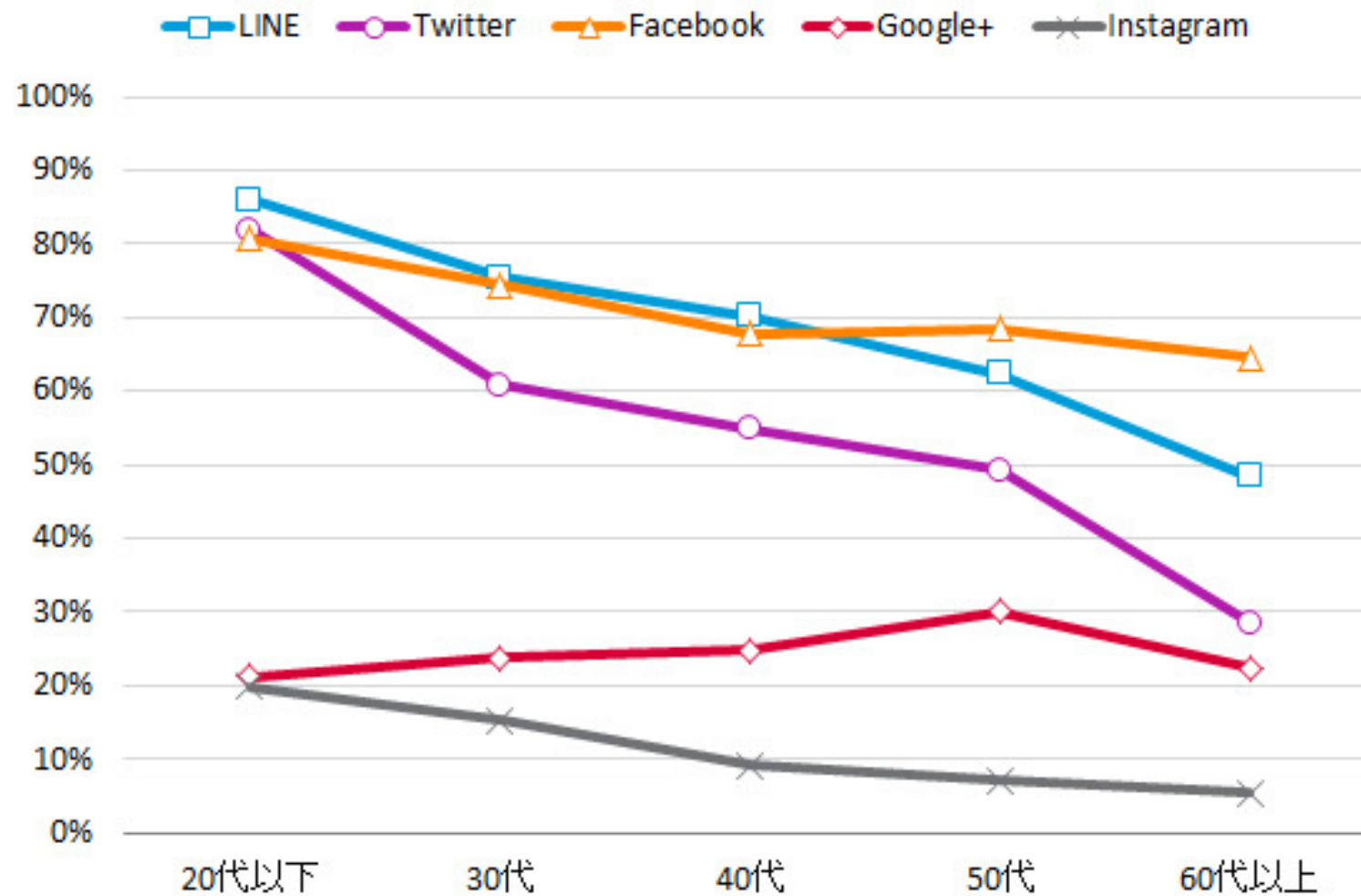


Source: Nielsen research

SNS in Japan (2)



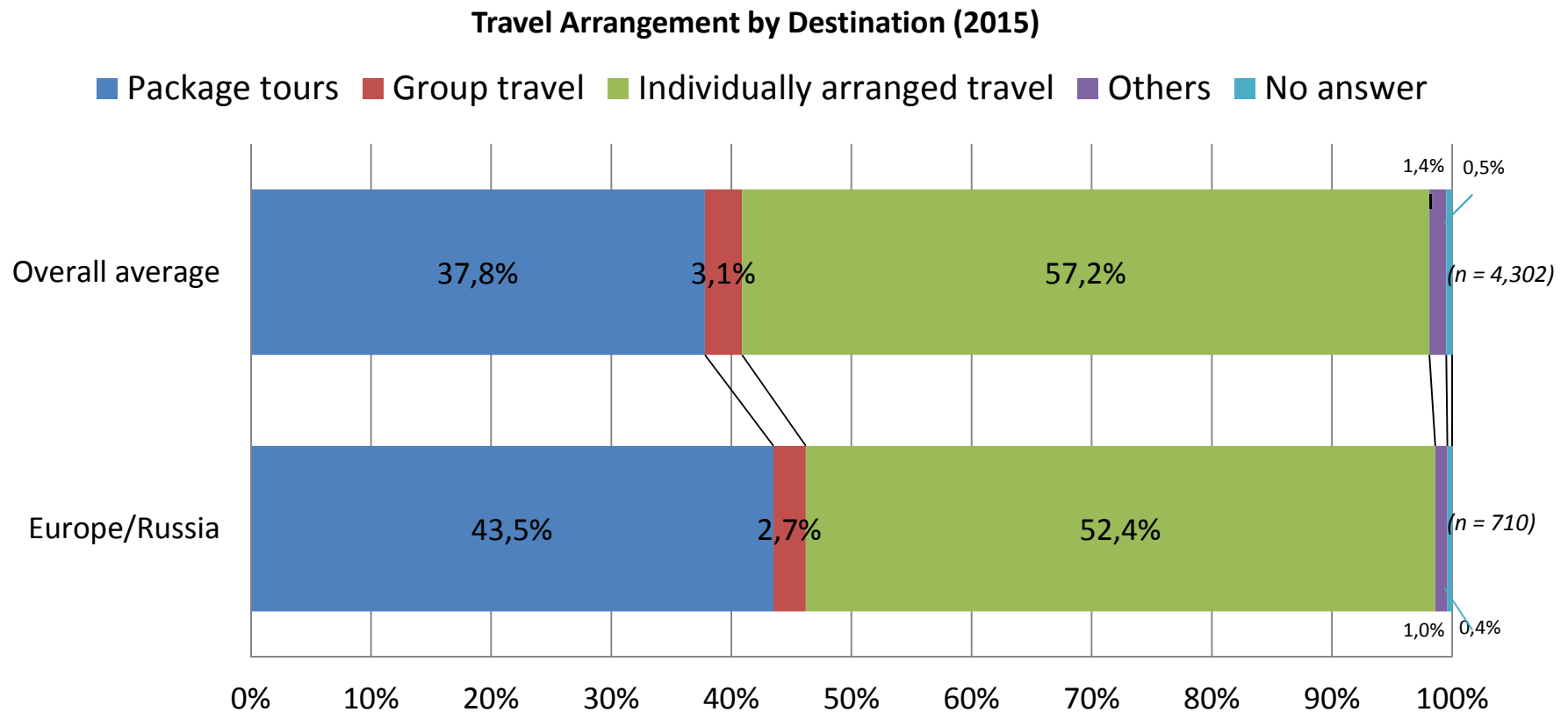
SNS in Japan (3)



Travel Arrangement by Destination

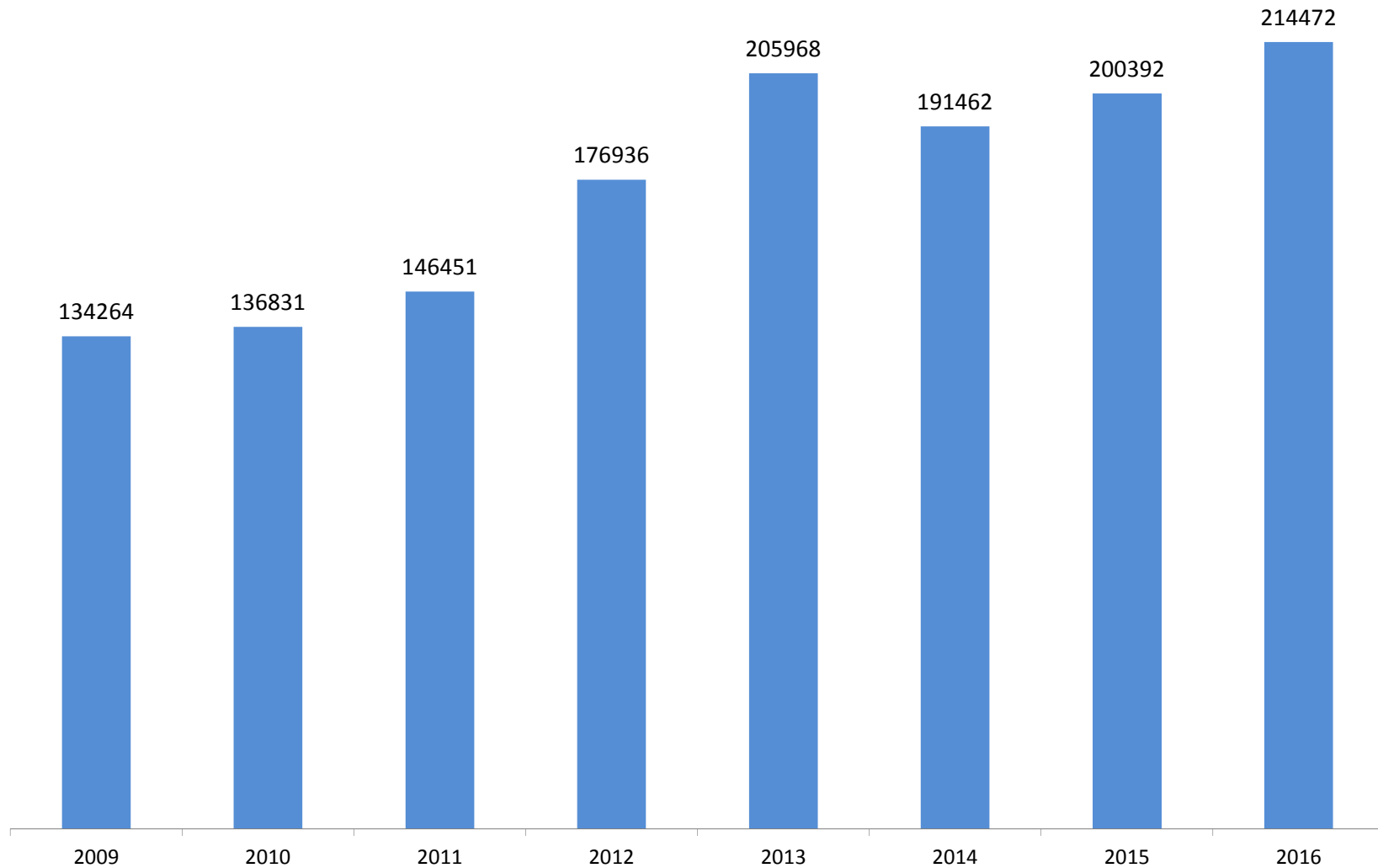
Europe/Russia

Package tour usage was high for both resort-type and touring destinations. The proportion of individually arranged travel did decline from the previous year (2014) and there was a noticeable increase in package-tour usage.

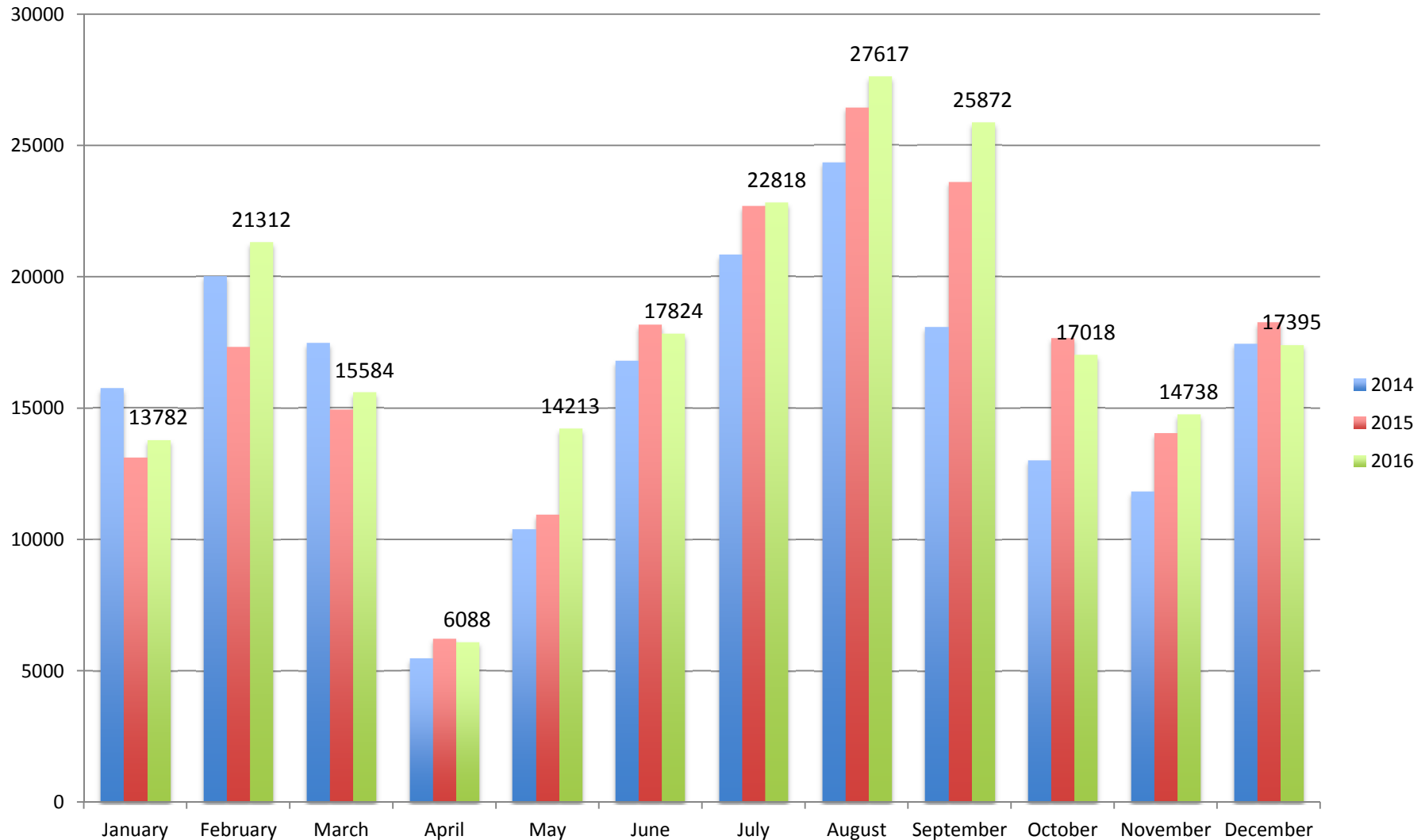


Source: Japan Tourism Marketing Co., "Factual Survey of the Overseas Travel Situation"

The number of overnights by Japanese in Finland



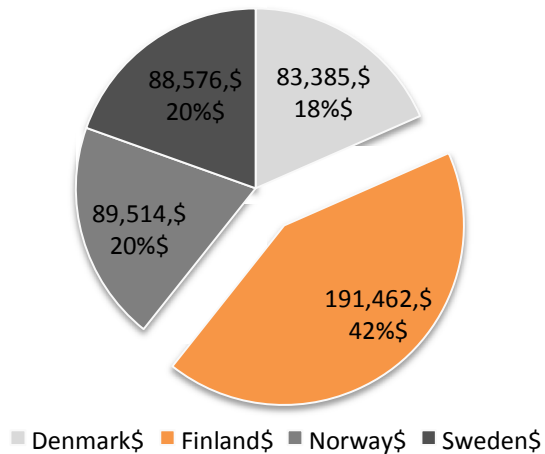
Overnights by Japanese in Finland



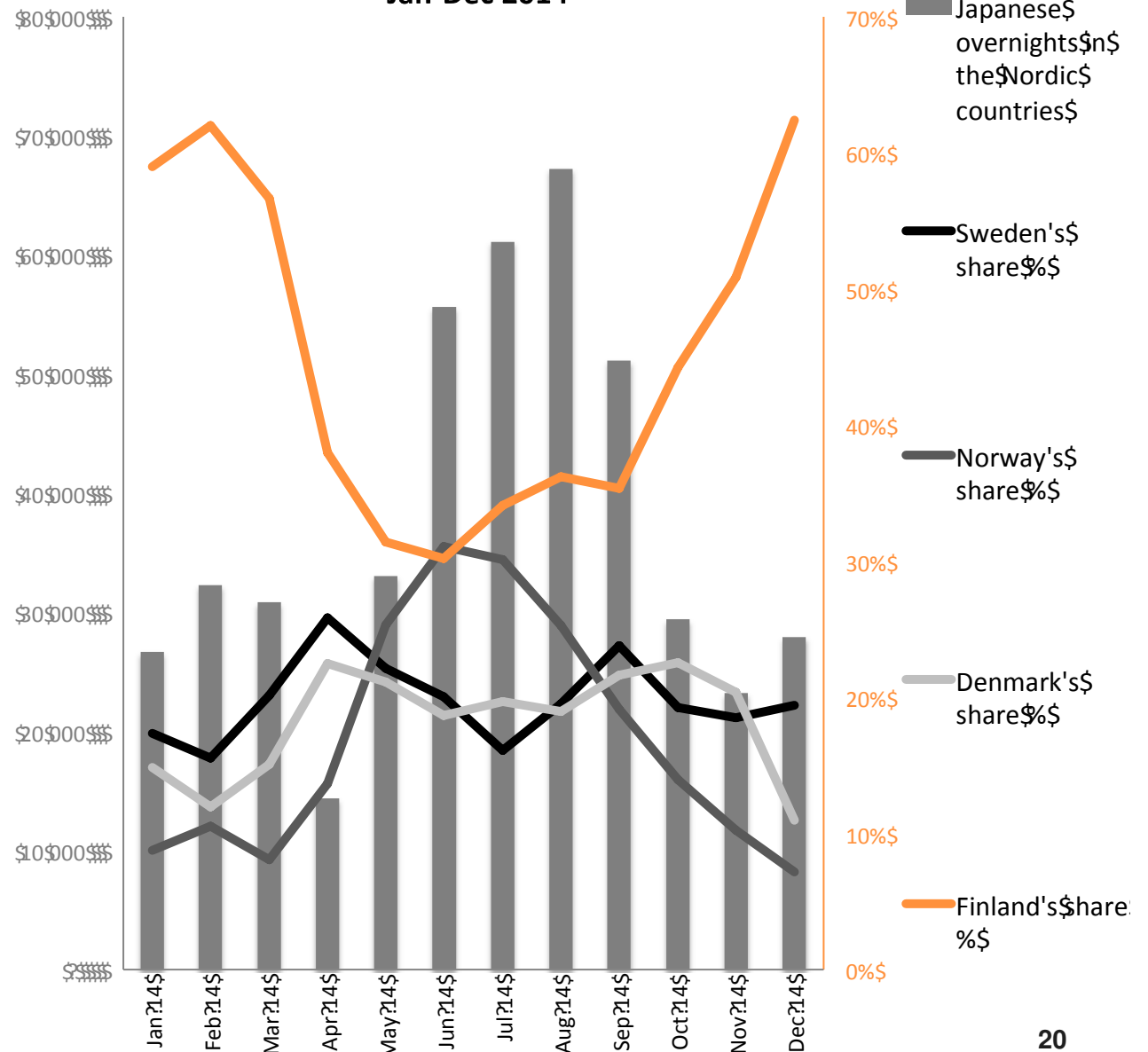
Japan

Finland's number one
Nordic destination in
Japanese markets.

Nordic countries' share of Japanese
overnights Jan-Dec 2014



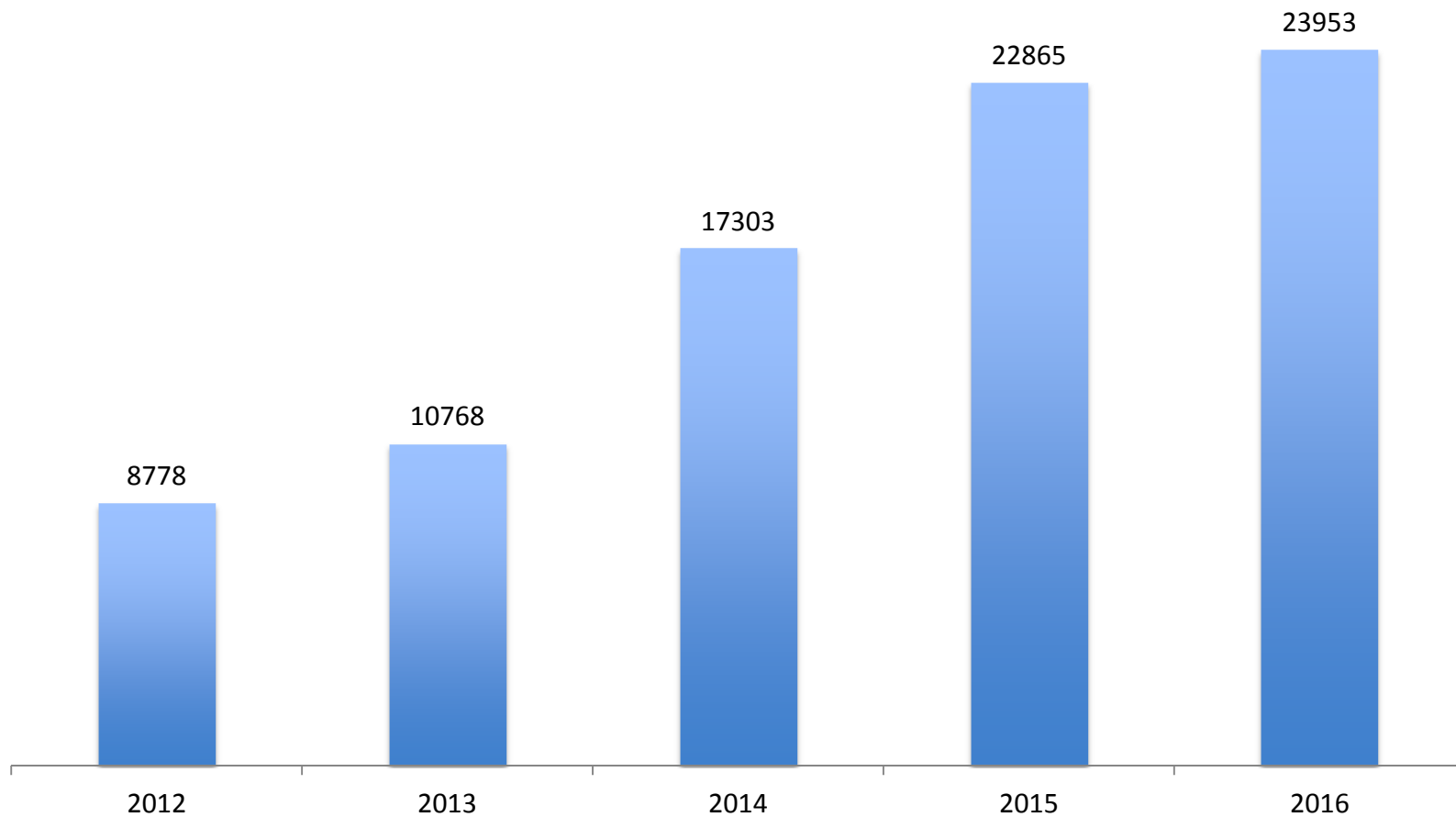
Development of Japanese overnights in the Nordic countries
Jan-Dec 2014



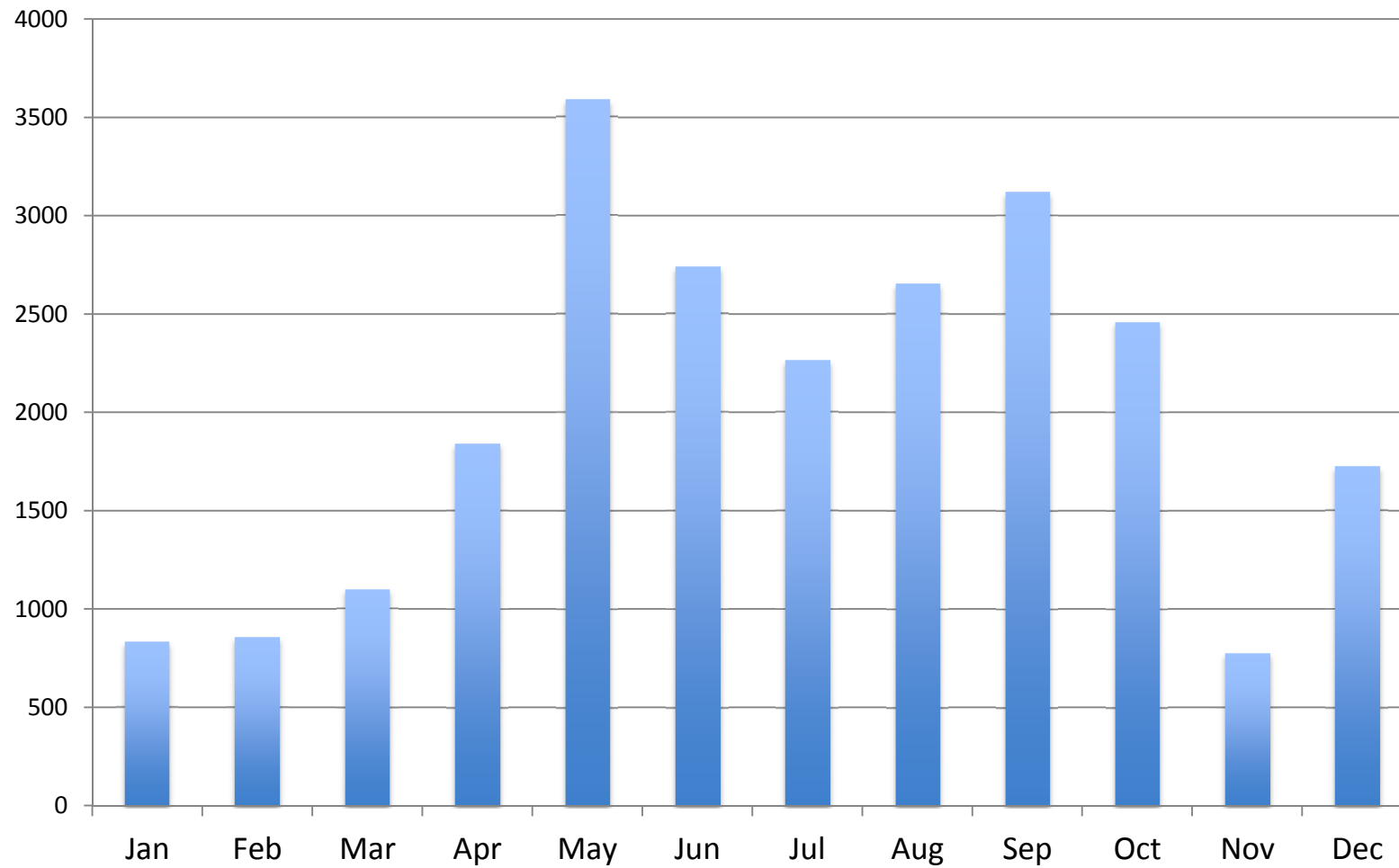
3 client's profiles for 3 seasons

- Elderly couples in summer season
- All generations in winter season
- Ladies in 20's-40's through the year

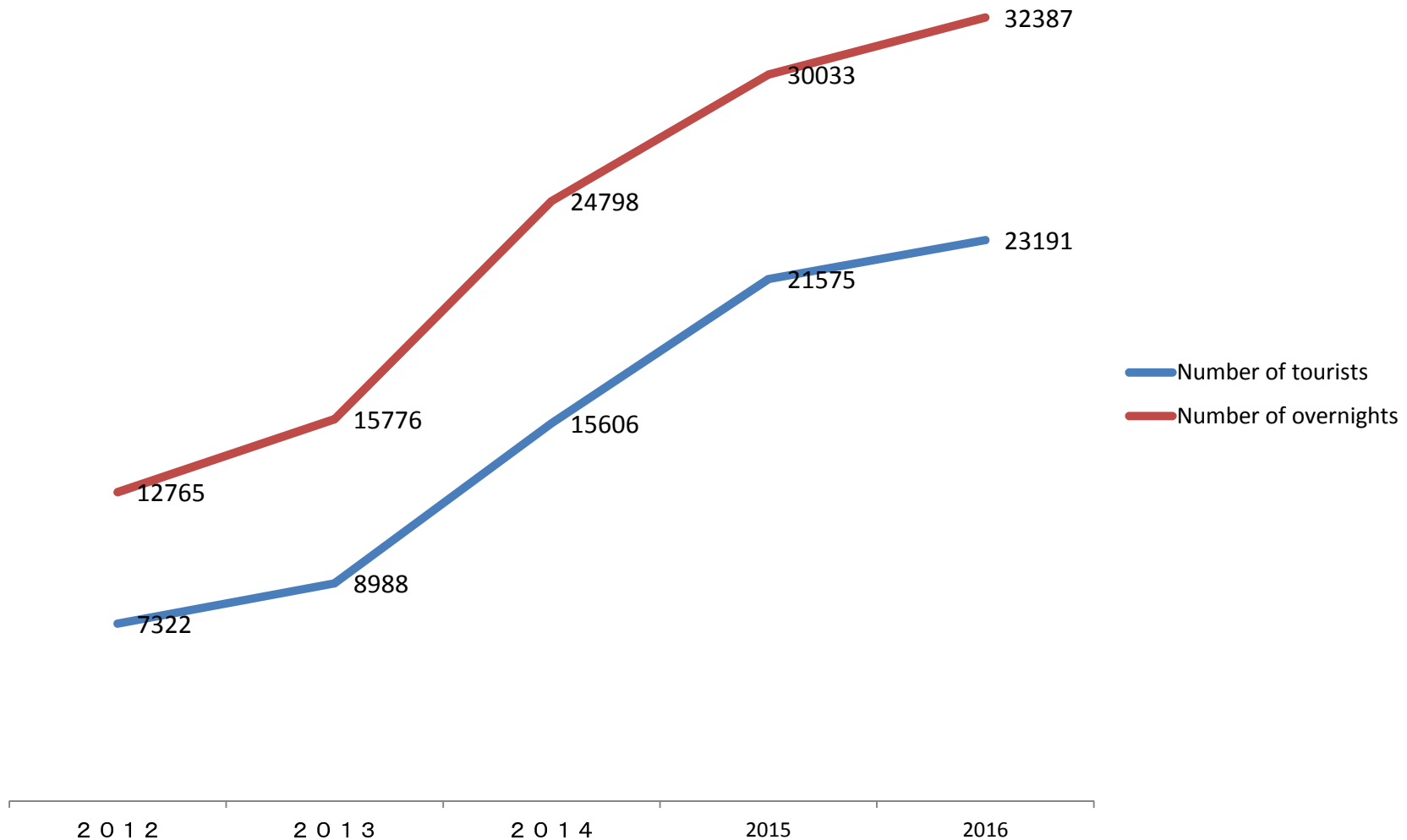
The number of overnights in Estonia



The number of overnights in Estonia by month



No of tourist & overnights in Latvia by Japanese



THANK YOU

