

# **FY2022 Project to Promote Local Tourism Resources Hokkaido Block Strategies**



**Tourism Department, Hokkaido District Transport Bureau, Ministry of Land,  
Infrastructure, Transport and Tourism**

October 18, 2021

# About the Project to Promote Local Tourism Resources

- The project encourages people overseas to visit Japan through **widespread, flexible cooperations between entities that are highly knowledgeable about local tourism resources, such as local government bodies, tourism organizations and private companies (including transport companies)**
- Knowledge and resources from JNTO (Japan National Tourism Organization) are used to build strategies for promoting local tourism resources that will appeal to overseas visitors, such as national parks and recognized cultural properties, to **attract more overseas tourists to the regions**

## Local tourism resources that can be used

- (1) Content written in **White Paper on Tourism (Kanko Hakusho) 2021, Part IV**
- (2) **National parks**
- (3) **World Heritage Sites, Japan Heritage Sites, cultural properties** recognized under the Act on Protection of Cultural Properties, etc.
- (4) Local tourism resources that are **gaining appeal with people overseas through analysis of avenues such as social media**



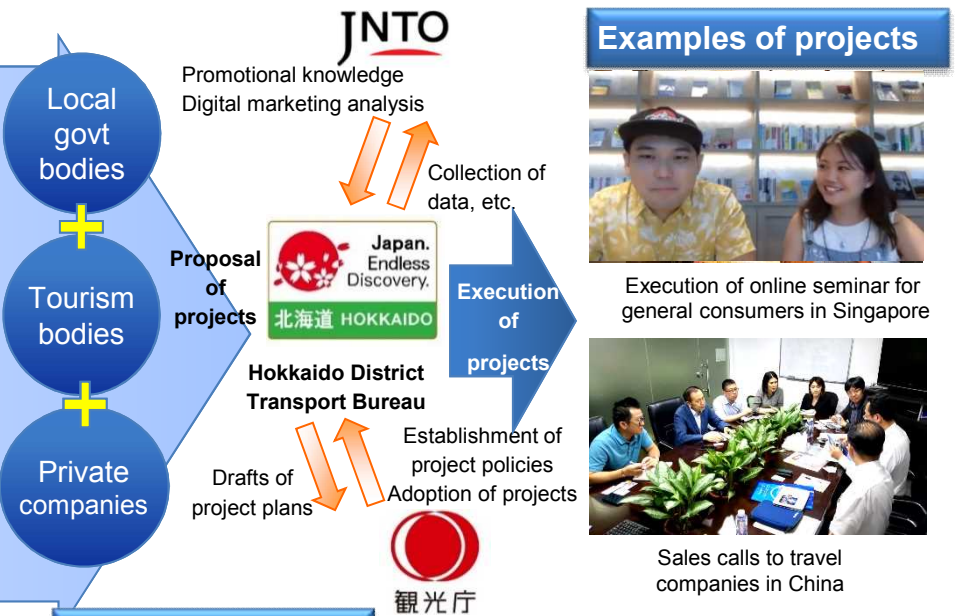
Trekking in Akan-Mashu National Park



Matsumae Castle, an Important Cultural Property of Japan



White Path, Soya Hills (Wakkanai City)



## Categories and roles

- Exhibits at events, the Tourism Expo, etc.; invitation of press and travel companies; joint advertising; Internet exposure (websites/social media); overseas business talks; seminars; overseas press conferences; Travel Mart; sales calls to travel companies, etc.; pure advertising; video production (max. 1/2)
- Production of print materials accompanying the above projects (max. 1/3)

## PDCA cycles

- Self-evaluations by District Transport Bureaus, project evaluations by external experts
- Use of JNTO's knowledge of promotional methods, reuse of data, application of results of digital marketing analysis

**Areas for improvement in past projects, analysis results and knowledge can be incorporated into plans**





**Strategy I** Share information with gradual recovery of inbound tourism in mind

- Roll out promotions during the **crucial window of time** as international travel resumes
- Promote Hokkaido's **high-quality, safe and clean** image to capture demand among travelers after the pandemic

**Strategy II** Attract visitors and boost consumer spending by capitalizing on Hokkaido's 3 main brands

- Facilitate cooperative promotions between government bodies and private entities **in preparation for ATWS2023**
- Position Hokkaido as a snow resort—promote the fact that we have some of the best **powder snow** in the world
- Appeal to foodies by promoting our fascinating **food culture** - both our **great local food** and the stories behind it

**Strategy III** Make the pandemic a turning point and lift the baseline of Hokkaido's tourism

- Capture the modern luxury segment to **expand economic ripple effect** and strengthen branding
- Promote value and tourist attractions that people will come to Hokkaido especially to enjoy, to **get tourists visiting more areas**
- Awaken latent demand during off-peak seasons to **make the lowest tourist numbers higher**

**Strategy IV** Roll out promotions based on level of interest in each market

Interest	Market	Method	
Latent	USA, UK, Canada, France, Germany, Italy, Russia, Spain, India, Mexico, Middle East	In addition to market-specific promotions, use themes that will appeal to the target markets, such as adventure travel, to put Hokkaido on the map as a travel destination.	Increase recognition of Hokkaido, centering on our 3 main brands
Growth	Thailand, Malaysia, Philippines, Indonesia, Vietnam, China (outside Beijing, Shanghai and Guangdong)	Share more information online to attract FITs. Create travel products based on how people travel in each market.	Create an image of the Hokkaido brand in the minds of people who have never visited Japan to encourage them to travel here
High interest	China (Beijing, Shanghai, Guangdong), Taiwan, South Korea, Hong Kong, Singapore, Australia	Appeal to repeat visitors to Japan with stronger web- and social-media-based promotions to introduce areas they don't know about and gain demand for special purposes.	Provide specific, practical information that is new to travelers

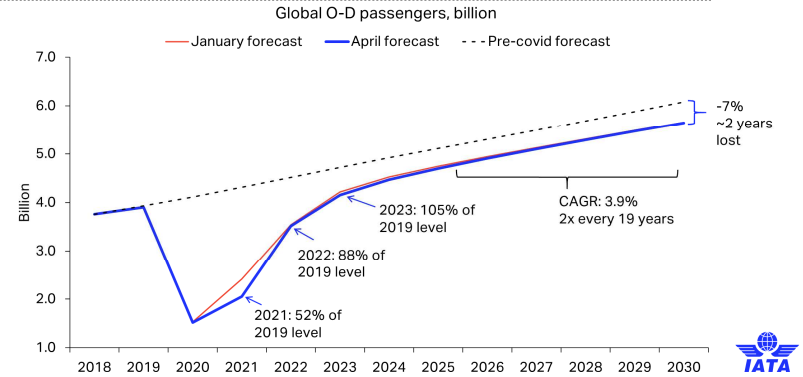
## Preparation for resumption of international tourism

## Now is the time to assess the COVID-19 situation domestically and overseas and actively share information

As vaccine rollouts progress, an increasing number of countries (particularly in North America and Europe) are relaxing restrictions, and **international tourism is expected to gradually recover.**

According to IATA, global demand for travel in 2023 is expected to exceed 2019's level. We can **prepare for a recovery in inbound travel** by observing the COVID-19 situation and changes in border restrictions in each market/country and proactively rolling out promotions.

## Method



Source: IATA report on 26 May 2021 - COVID-19, an almost full recovery of air travel in prospect

- We are working together with JNTO to make judgments in stages for each market based on the COVID-19 situation, changes in border restrictions, public opinion on inbound travel and regions' willingness to accept it in each market and in Japan itself, and rolling out promotions during the crucial window of time.
- This includes promotions to secure repeat visits from travelers in other Asian markets, who are expected to resume visits to Japan quickly.

◇ Promotions in stages according to border restrictions (execution plan)

- For the time being, information is primarily being shared online, combined with offline promotions based on the COVID-19 situation and changes in border restrictions. Insights from real experience are used to promote Hokkaido's appeal.
- Until tourists can enter Japan again, this sharing of information does not call for immediate travel but instead seeks to encourage future visits, get people excited about Hokkaido, build a brand and strengthen relationships with affiliates.

Situation		Stay-at-home orders in Japan	Domestic travel resumes (inbound travel not permitted)	Inbound travel permitted with restrictions (some border restrictions remain)	Inbound tourism fully resumes (all border restrictions lifted)
Conditions		-	-	Commencement of Business Track travel	Conditional resumption of tourism
Individual business categories	BtoC	<b>Internet exposure (websites/social media)/print, images, videos</b> <b>Overseas media and influencer conferences/seminars, networking events (BtoC)/pure advertising</b> <b>Invite Japan-based media and overseas influencers living in Japan</b> <b>Appear at the Tourism Expo, invite overseas media</b> <b>Invite overseas influencers</b>			
	BtoB	<b>Seminars, networking events (BtoB)</b> <b>Invite travel companies, Travel Mart/overseas business talks/sales calls to travel companies, etc.</b> <b>Joint advertising</b>			

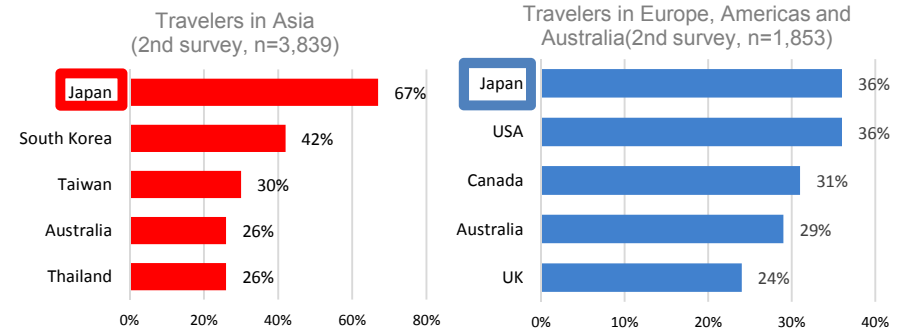
## Changes in travel demand

## Share information carefully selected to capture demand among travelers post-pandemic

While demand among travelers has changed since the pandemic began, **the appeal of Japan's tourist selling points (nature, weather, culture and food) remains unchanged.** Demand for travel to Japan is high, with Hokkaido one of travelers' preferred destinations.

In addition to predictions of an increased interest in elements such as nature, the outdoors and wellness, the budget and length of travelers' stays are also trending upward. We are therefore promoting **high-quality outdoor content and multi-day visits**, along with **Hokkaido's safe, clean image.**

◇ Top 5 countries/regions that people want to visit post-COVID-19



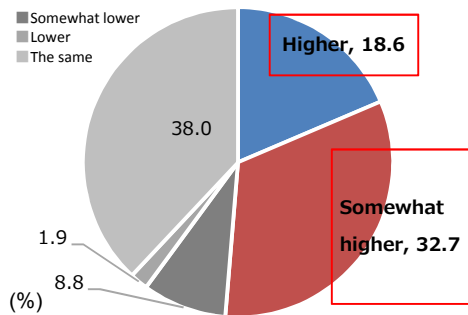
Source: Development Bank of Japan/JTBF: Asia, Europe, Americas and Australia - Survey on Interest in Inbound Travel to Hokkaido (June 2021)

## Method

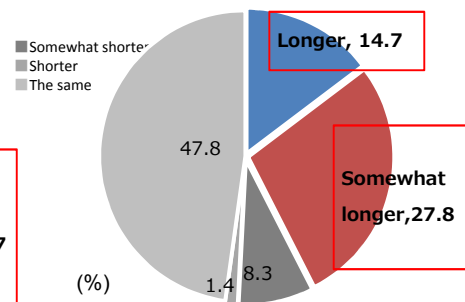
- Accurately assess the situation in each market using market data, surveys, etc. by the JNTO and private organizations.
- Promote high-quality travel experiences for multi-day trips by recognizing demand and reflecting it in strong themes and stories that will get people traveling.
- Use content created or refined by regions with the post-pandemic world in mind to showcase the appeal of each region.
- Use pictogram created by JNTO to create the necessary environment for inbound tourism and provide clear explanations of measures to prevent the spread of COVID-19 to allay concerns about traveling to Japan.

◇ Pictogram (created by JNTO) providing information such as measures being taken in Japan to prevent the spread of COVID-19  
<https://www.jnto.go.jp/jpn/news/topics/20210226.pdf>

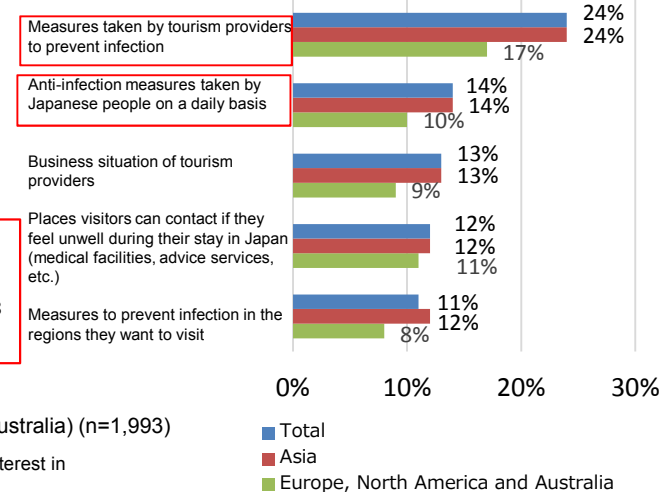
◇ How overseas travelers' budgets will be different after the pandemic (respondents hoping to travel to Hokkaido)



◇ How the length of overseas travelers' stays will be different after the pandemic (respondents hoping to travel to Hokkaido)



◇ Information considered most necessary for visitors to Japan/Hokkaido



Total (Asia, Europe, Americas and Australia) (n=1,993) Total (Asia, Europe, Americas and Australia) (n=1,993)

Source: Development Bank of Japan/JTBF: Asia, Europe, Americas and Australia - Survey on Interest in Inbound Travel to Hokkaido (June 2021)

## Coronavirus (COVID-19) Control Measures for Safe Travel in Japan

Various measures to control the spread of COVID-19 have been adopted by companies and organizations throughout Japan.



JNTO

## Purpose

Nature, activities and culture: building our adventure travel brand

The adventure travel market is reported to be worth around 72 trillion yen\*. We are capitalizing on the appeal Hokkaido holds for adventure travelers—such as Hokkaido's unique culture and nature—and building a new brand by **promoting multi-day tourism that incorporates local experiences and storytelling.**

\*Source: The Adventure Travel Trade Association

- Incredible nature right on people's doorsteps
- Wide variety of activities
- Jomon, Ainu and Japanese culture



## Method

- Promotions with the Adventure Travel Trade Association (ATTA).
- Facilitate cooperative promotions between government bodies and private entities (other ministries and agencies, local government bodies, tourism associations, guides, outdoor activity companies, etc.) in preparation for the Adventure Travel World Summit (ATWS2023) being held in Hokkaido.
- Invite travel companies and media outlets that expressed interest in Hokkaido at ATWS2021 to get them even more interested.
- Promotions with Upopoy, a facility dedicated to celebrating and reviving Hokkaido's indigenous Ainu and Jomon cultures
- Promote valuable low-impact experiences of Hokkaido's nature and culture.



### Soft types: 23



### Hard types: 3



### Other types: 8



\*This information was compiled by the Hokkaido District Transport Bureau from the UNWTO Global Report on Adventure Tourism



Purpose

Promote the fact that we have some of the best powder snow in the world

Appeal to skiers and snowboarders around the world by promoting our **top quality powder snow—some of the best in the world—and amazing ski conditions** to build a global brand.

- World-class powder snow
- Consistent snowfall every year
- Long seasons
- Altitudes that do not cause physical strain

Method

- As aviation routes resume, work with a wide range of affiliates, such as Hokkaido skiers, to promote Hokkaido as a whole.
- Continue measures to capture the growing numbers of Chinese skiers after the 2022 Beijing Winter Olympics.
- Share information such as the COVID-19 precautions being taken at each snow resort and details on facilities and lessons, along with specific, practical information such as tourist information for the areas around the resorts.
- Share information in conjunction with the Project for the Creation of Snow Resorts.



	Beginners	Experts
Method	For markets where skiing and snowboarding is not an established hobby, promote skiing and snowboarding as an out-of-the-ordinary experience with features such as snowshoeing and snowmobiles	For markets with a lot of skiers, we aim to gain both new visitors and loyal repeat visitors by promoting the things that set us apart from competing areas overseas—the quality of the snow, our excellent ski conditions and our delicious food.
Target	Travelers from areas with no snow New/inexperienced skiers and snowboarders	Intermediate to expert skiers and snowboarders
Themes for promotions	Enjoy playing in the snow The fun of skiing and snowboarding, kids' lessons	Some of the best powder snow in the world Incredible ski conditions, great après ski
Main targets Market	Hong Kong, Singapore, China, Thailand, Malaysia, Taiwan, Philippines, Indonesia, Vietnam	Australia, USA, Germany, UK, Canada, Russia, China, South Korea

Purpose

Build a brand from the way our food adds to visitors' travel experience by reflecting local history, culture, etc.

We aim to **attract visitors to areas such as farming and fishing villages** by **promoting elements of local food culture**, such as the ingredients grown in Hokkaido's abundant natural areas and the story behind our food, such as unique local cooking methods and how they are influenced by the area's history, traditions and customs.

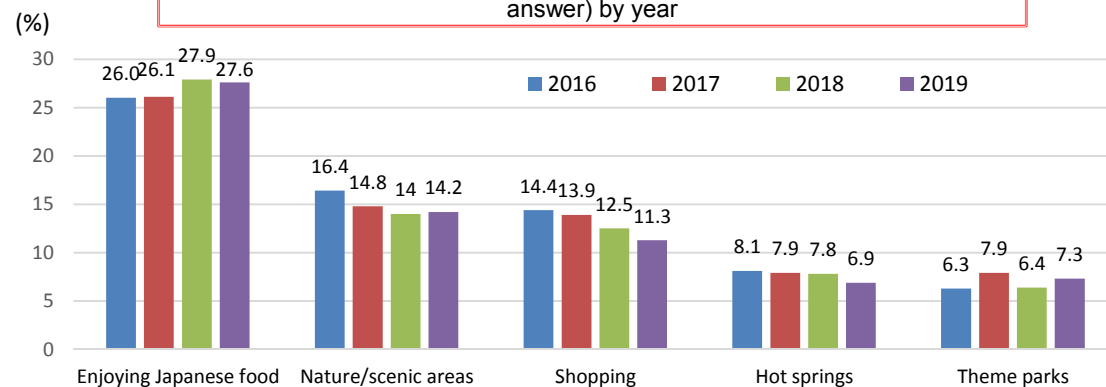
Method

- Promote dishes/food culture according to level of interest in different markets and tastes by sharing compelling information through effective media and methods
- Share details of stringent sanitation and make the most of how Japanese food is known for being healthy.
- Promote Hokkaido's alcoholic beverages such as wines, sakes, whiskeys and beers that pair well with local dishes
- Share information to increase consumption of Hokkaido foods (specialty sweets, etc.) by travelers during and after their visit.
- Take measures to make sure local dishes are accessible to tourists who are vegetarian/vegan, have food allergies or have religious needs such as halal food for Muslims. Provide information on restaurants that meet these needs.

- Fresh, high-quality produce and seafood
- Wide range of dairy products and famous confectionery
- Variety of Hokkaido sakes to enjoy with food
- Great regional foods



◇ Top 5 greatest expectations before visiting Japan (all countries/regions, single answer) by year



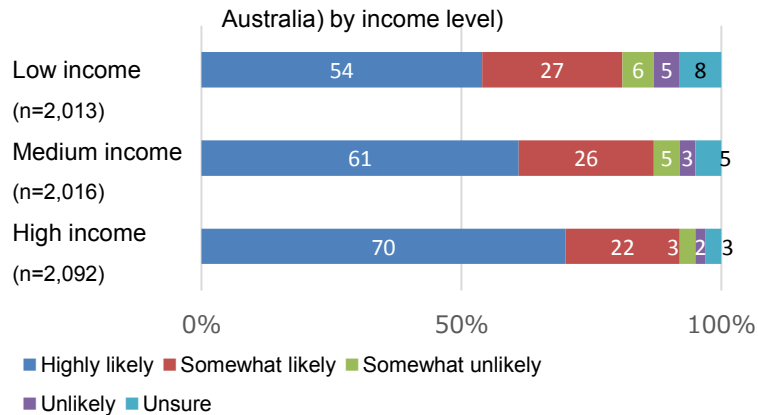
Source: Survey on trends in consumption among overseas visitors to Japan by the Japan Tourism Agency



Strengthening earning power

Capture the modern luxury segment to expand economic ripple effect and strengthen branding

◇ Inclination to travel overseas (all (Asia, Europe, Americas and Australia) by income level)



Source: Development Bank of Japan/JTBF: Asia, Europe, Americas and Australia - Survey on Interest in Inbound Travel to Hokkaido (June 2021)

In the survey of people in in Asia, Europe, the Americas and Australia conducted by the Development Bank of Japan last December, people in the high income bracket were the most likely to travel overseas after the pandemic. For this reason, we will promote excitement and experiences that are only possible when traveling in Hokkaido, along with the unique stories Hokkaido has (activities in nature, history, culture, customs, etc.) to the **growing base of tourists looking for modern luxury**. We will closely tailor services to these tourists' needs and give them value for the money they are willing to spend.

Method

- Share authentic things in Hokkaido. Refine and promote these as highly satisfying travel products with high-quality service.
- Reliably reach travelers looking for modern luxury through a balanced campaign targeting both BtoB and BtoC.

About luxury travel and luxury travelers

A survey by JNTO in FY2017 defined luxury travel as **a trip where one million yen or more is spent at the destination**. Wealthy people who engage in luxury travel and are the targets of luxury travel promotions are defined as **luxury travelers**.

The mindset of luxury travelers



	Classic Luxury ⇒ Conventional luxury (mainly people in their 50s and 60s)	Modern Luxury ⇒ A new style of luxury (mainly Millennials in their 20s and 30s)
Trend		
Values	Wealth, power, status, glamour, desire, consumption  ⇒ focus on perception by others/society and what is familiar to them	Culture, origin, heritage, style, identity, authenticity, quality  ⇒ focus on trying new things, experience over luxury, finding something that is meaningful to them
Needs when traveling	High level of comfort Exclusivity Best service Status symbols Privacy	Authentic experiences Eco-tourism Once-in-a-lifetime experiences Voluntourism Sustainability

**Encourage travel in more areas**

Promote value and tourist attractions that people will come to Hokkaido especially to enjoy

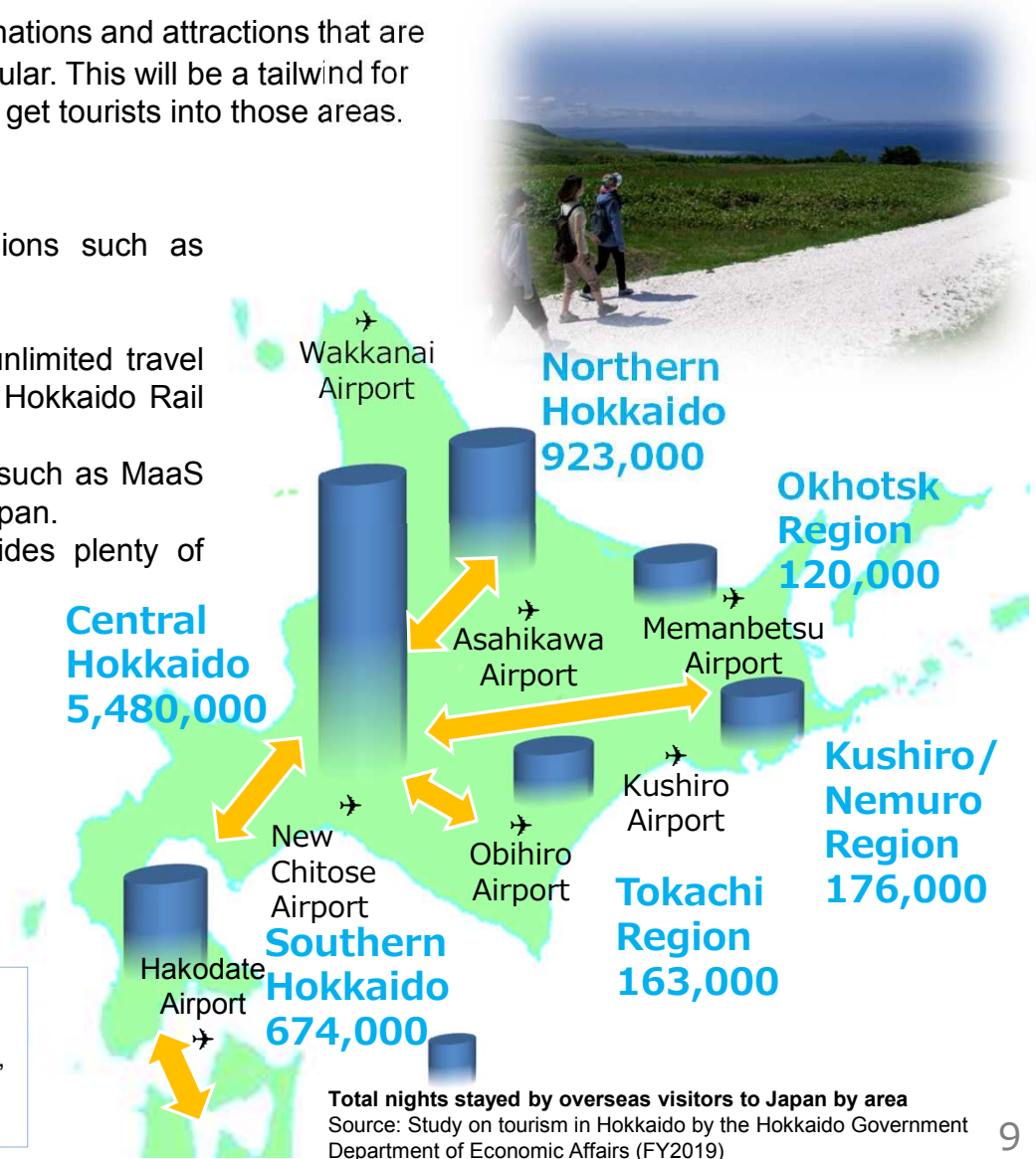
After the pandemic, it is likely that tourists will prefer destinations and attractions that are not too crowded, and solo travel will become even more popular. This will be a tailwind for our efforts to boost recognition of less well-known areas and get tourists into those areas.

**Method**

- Effectively promote appealing tourist resources in regions such as eastern, northern and southern Hokkaido.
- Roll out promotions with regional airports in Hokkaido.
- Promote travel around various areas by making use of unlimited travel passes such as the Hokkaido Rail Pass, JR East-South Hokkaido Rail Pass and Hokkaido Budget Bus Pass.
- Pay attention to the rising popularity of mobility services such as MaaS and promote their benefits for more convenient travel in Japan.
- Promote the fact that the openness of Hokkaido provides plenty of freedom for road trips.



\*Target markets whose citizens can drive in Japan with an international driver's license, etc.  
 Taiwan, South Korea, Hong Kong, Singapore, Thailand, Malaysia, USA, Canada, Australia, UK, France, Germany, Philippines, India, Italy, Russia, Spain, Middle East (UAE, Turkey, Israel)



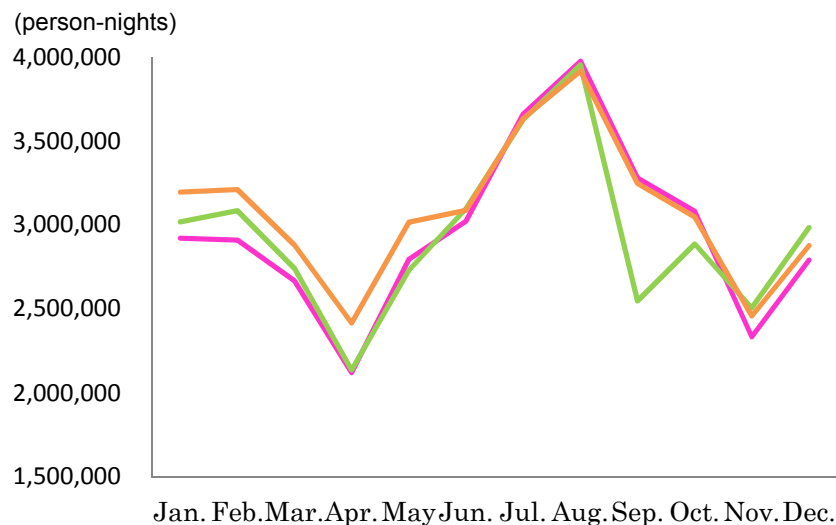
Even out tourism

Awaken latent demand during off-peak seasons to make the lowest tourist numbers higher

Attract more tourists between March and June and between September and November, when there are fewer overseas tourists, so that tourism employees can work year-round. This will improve service standards.

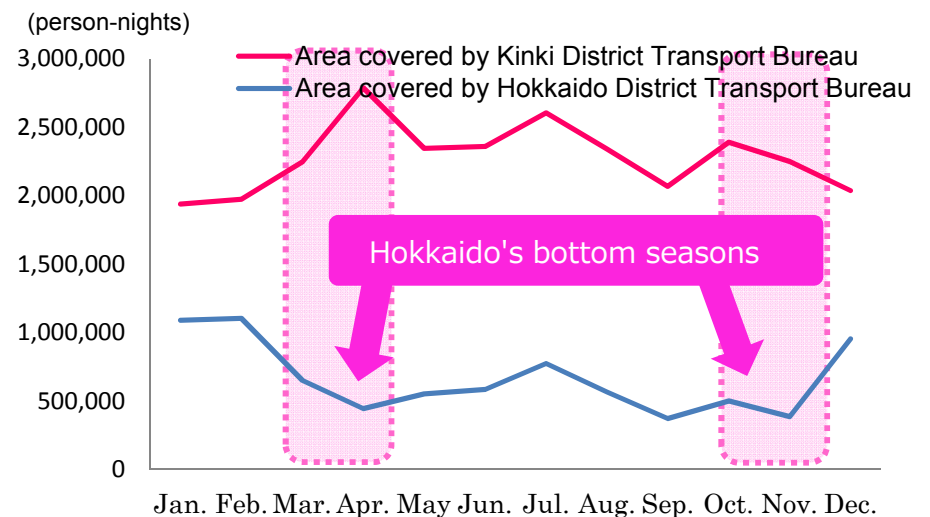
Method

- Target repeat visitors and the senior demographic (who have plenty of time and are not confined to the usual travel season) with value, tourist attractions and new content that will make them want to visit during off-peak seasons.
- Tap into markets where there is an overlap between off-peak and peak-season travel.
- Share content for themed travel that isn't confined to a specific season and multi-day travel such as workations in national parks.
- Work together with areas outside Hokkaido to cover a wide area and promote the way tourists can experience multiple seasons on the same vacation.
- Strengthen promotions for school trips to Japan and MICE.



◇ Total number of visitors (**including overseas visitors**) staying in Hokkaido by month

Source: Statistical study on accommodation by the Japan Tourism Agency



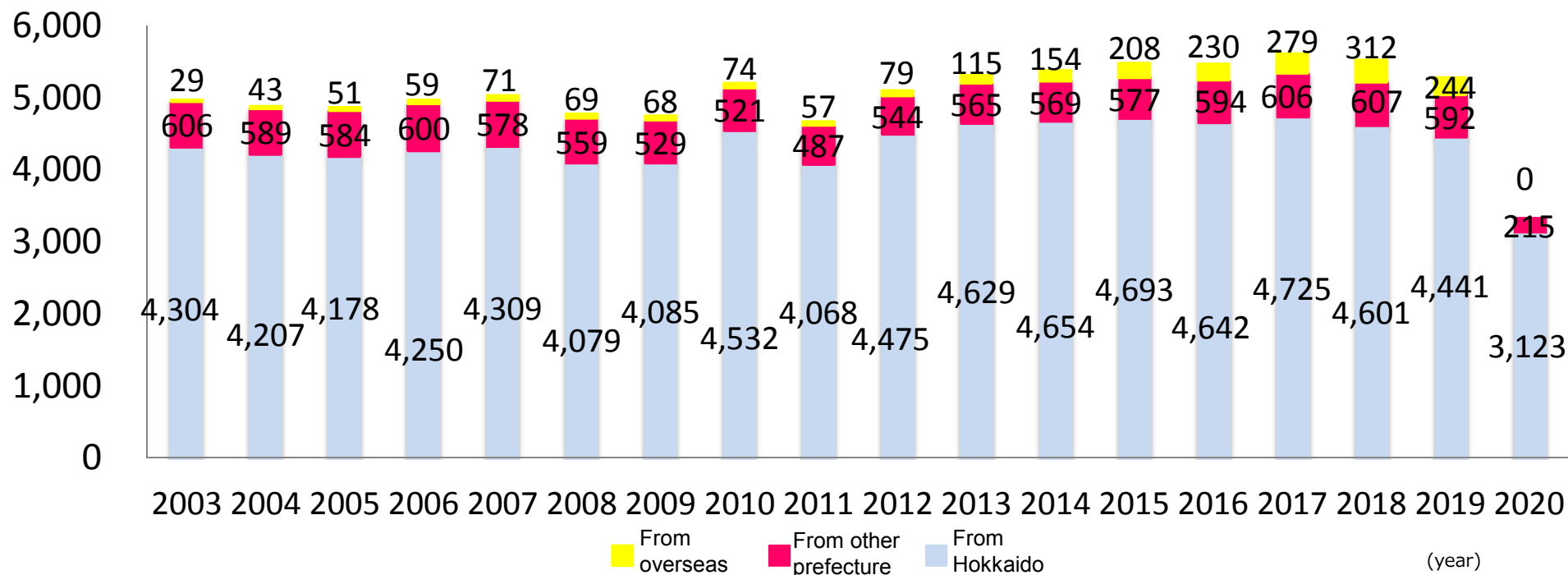
◇ Total number of visitors (**overseas visitors only**) staying in the areas covered by the Hokkaido and Kinki District Transport Bureaus in 2019

Source: Statistical study on accommodation by the Japan Tourism Agency



# Number of tourists in Hokkaido (real numbers)

(unit: 10,000 people)



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Ratio of tourists in Japan (2021)
From Hokkaido	4,304	4,207	4,178	4,250	4,309	4,079	4,085	4,532	4,068	4,475	4,629	4,654	4,693	4,642	4,725	4,601	4,441	3,123	70.3%
From other prefecture	606	589	584	600	578	559	529	521	487	544	565	569	577	594	606	607	592	215	36.3%
From overseas	29	43	51	59	71	69	68	74	57	79	115	154	208	230	279	312	244	0	0.0%
Total	4,939	4,839	4,813	4,909	4,958	4,707	4,682	5,127	4,612	5,098	5,310	5,377	5,477	5,466	5,610	5,520	5,277	3,338	63.3%

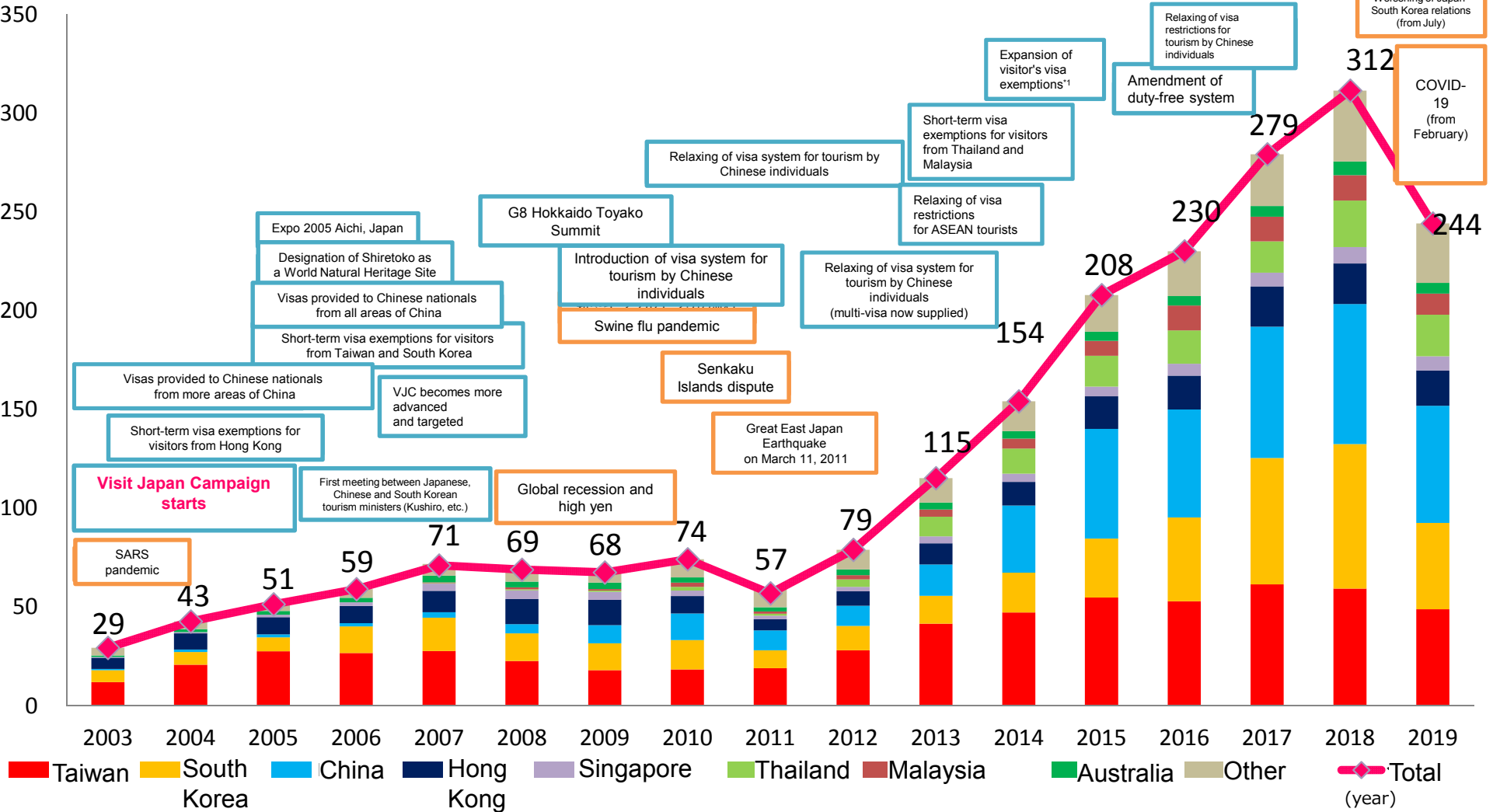
Note: A simple comparison over time is not possible as a new surveying method was adopted in April 2010

(unit: 10,000 people)

Source: Study on tourism in Hokkaido by the Hokkaido Government Department of Economic Affairs

# Overseas tourists visiting Hokkaido (real numbers)

(unit: 10,000 people)



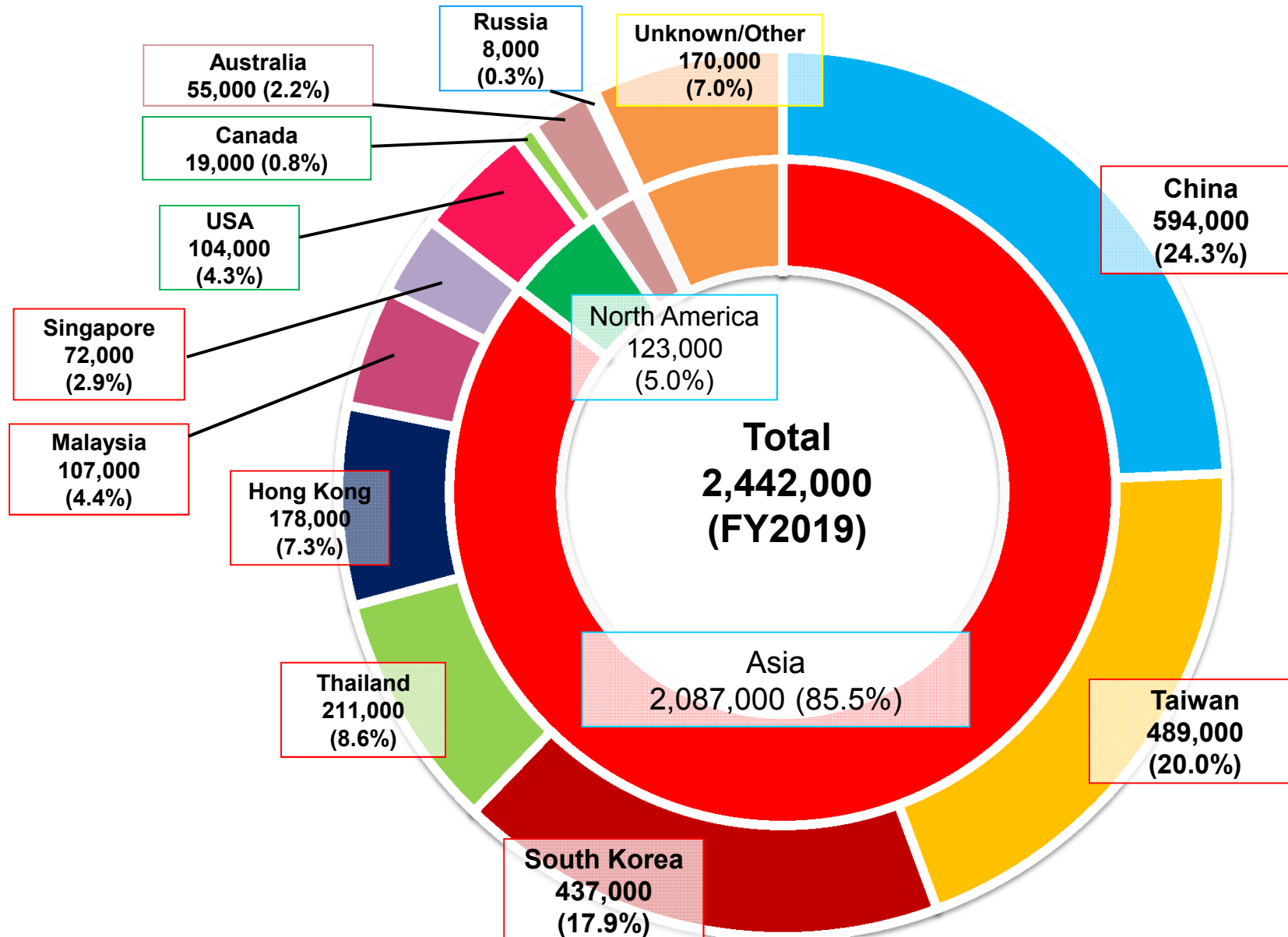
Source: Study on tourism in Hokkaido by the Hokkaido Government  
Department of Economic Affairs

Note: Data for FY2019 is used, as the Hokkaido Government Office did not make data for FY2020.

Note: A simple comparison over time is not possible as a new surveying method was adopted in April 2010

\*1 Visa exemptions were granted to tourists from the Philippines and Vietnam from November 20, 2014 and to tourists from Indonesia from December 1, 2014

# Overseas tourists visiting Hokkaido by country/region (FY2019)

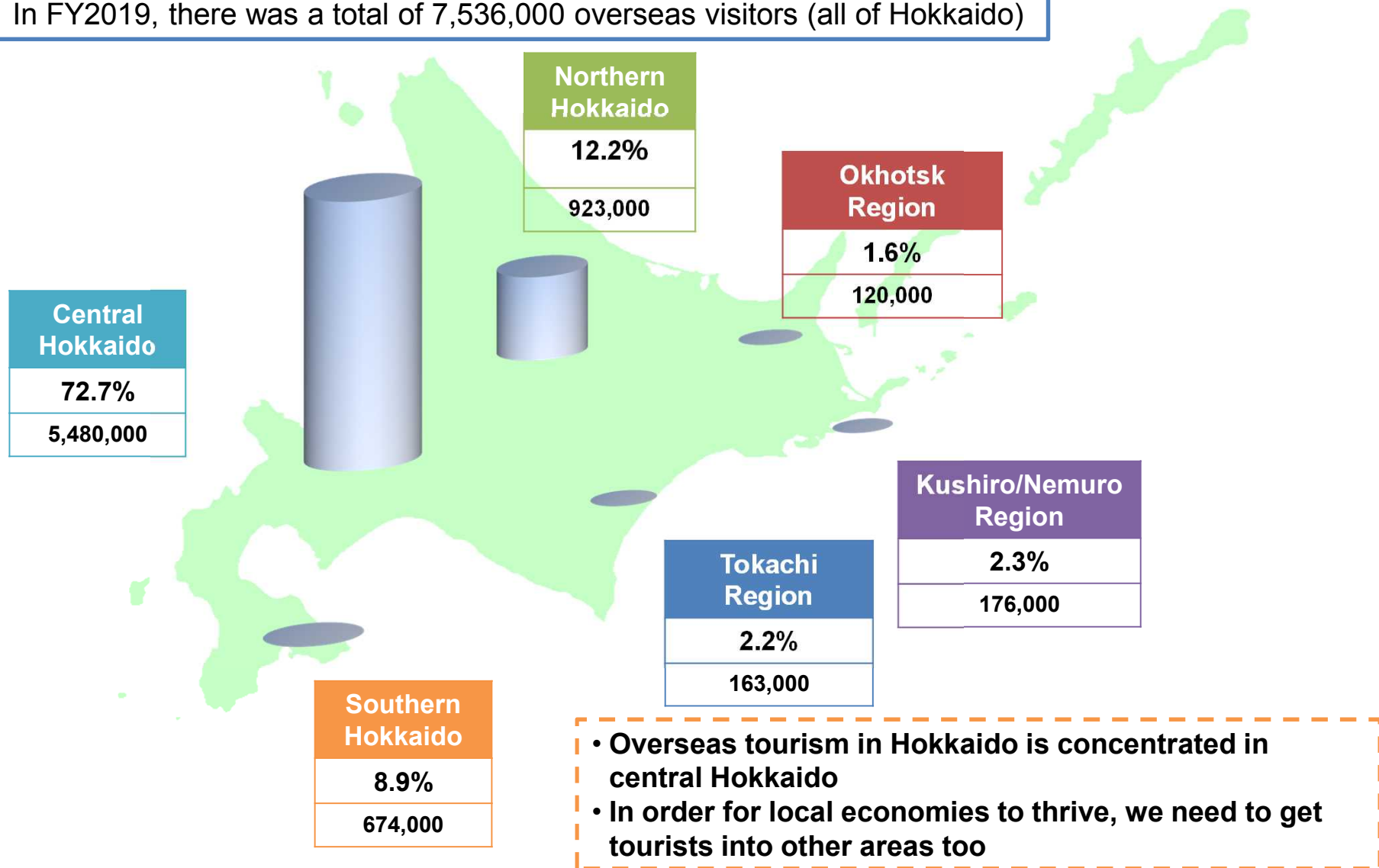


Source: Study on tourism in Hokkaido by the Hokkaido Government Department of Economic Affairs  
 Note: Data for FY2019 is used, as the Hokkaido Government Office did not make data for FY2020.



# Structural issue of tourism in Hokkaido: concentration of tourists in central Hokkaido

In FY2019, there was a total of 7,536,000 overseas visitors (all of Hokkaido)



Source: Study on tourism in Hokkaido by the Hokkaido Government Department of Economic Affairs (FY2019)

Note: Data for FY2019 is used, as the Hokkaido Government Office did not make data for FY2020.

# Total nights stayed by overseas visitors to Japan by District Transport Bureau

2020: Total of 20,350,000 overseas visitors (all of Japan)  
 2019: Total of 115,660,000 overseas visitors (all of Japan)  
 2018: Total of 94,280,000 overseas visitors (all of Japan)

2018	2019	2020	Okinawa
6.6%	6.7%	5.2%	
6,200,000 person-nights	7,750,000 person-nights	1,070,000 person-nights	



2018	2019	2020	Hokuriku-Shinetsu
3.4%	2.9%	5.0%	
3,210,000 person-nights	3,400,000 person-nights	1,020,000 person-nights	



2018	2019	2020	Kinki
25.6%	28.5%	26.0%	
24,090,000 person-nights	32,940,000 person-nights	5,300,000 person-nights	

2018	2019	2020	Chugoku
2.2%	1.9%	1.6%	
2,100,000 person-nights	2,200,000 person-nights	320,000 person-nights	

2018	2019	2020	Kyushu
8.7%	7.5%	6.3%	
8,230,000 person-nights	8,680,000 person-nights	1,290,000 person-nights	



2018	2019	2020	Shikoku
1.0%	1.1%	0.9%	
970,000 person-nights	1,220,000 person-nights	180,000 person-nights	

2018	2019	2020	Hokkaido
8.8%	7.6%	10.1%	
8,340,000 person-nights	8,810,000 person-nights	2,050,000 person-nights	

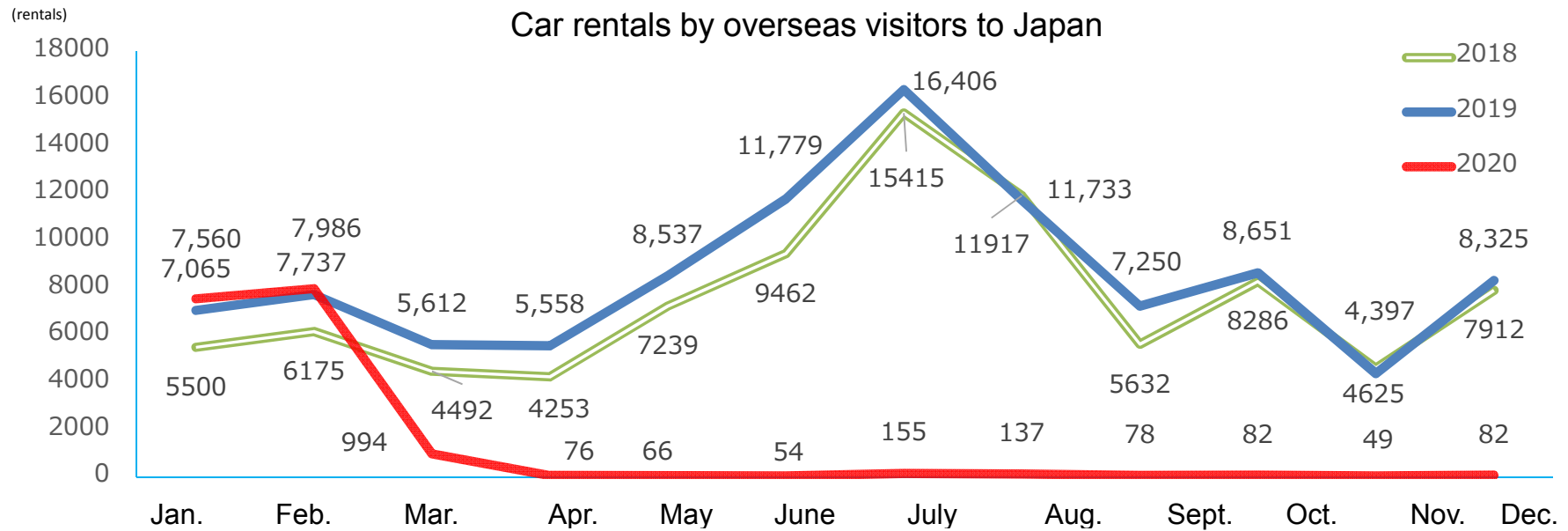
2018	2019	2020	Tohoku
1.6%	1.6%	2.4%	
1,470,000 person-nights	1,850,000 person-nights	500,000 person-nights	

2018	2019	2020	Kanto
35.1%	35.0%	36.0%	
33,120,000 person-nights	40,540,000 person-nights	7,320,000 person-nights	

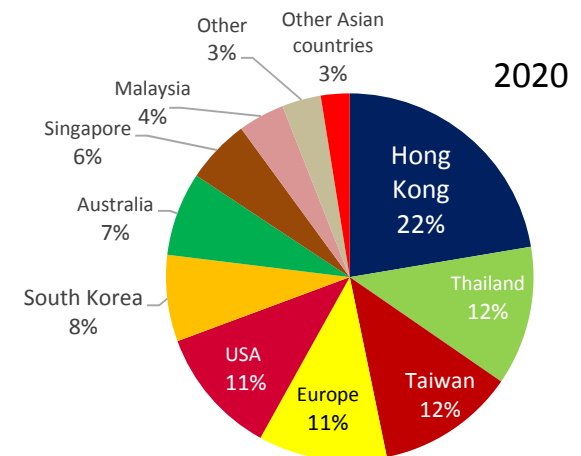
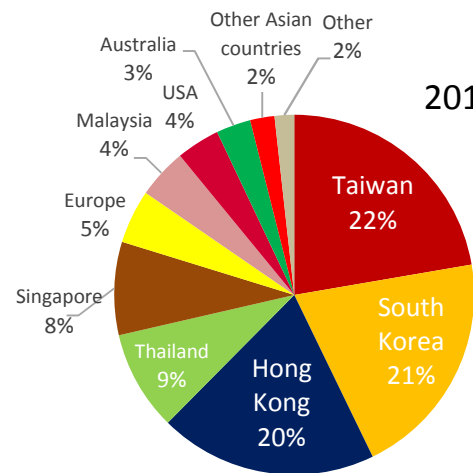
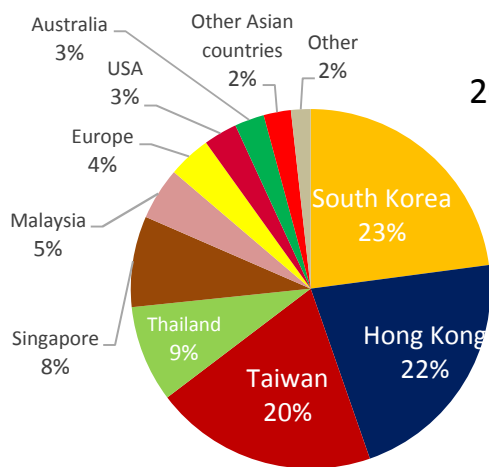
2018	2019	2020	Chubu
6.9%	7.2%	6.4%	
6,540,000 person-nights	8,270,000 person-nights	1,300,000 person-nights	

Source: Statistical study on tourist accommodation by the Japan Tourism Agency

# Car rentals by overseas visitors to Japan



Car rentals by overseas visitors to Japan by country and region



Source: Hokkaido Rent-A-Car Association

Note: These figures were compiled from the figures supplied by the Sapporo, Asahikawa, Hakodate, Kushiro, Obihiro and Kitami car rental associations.