

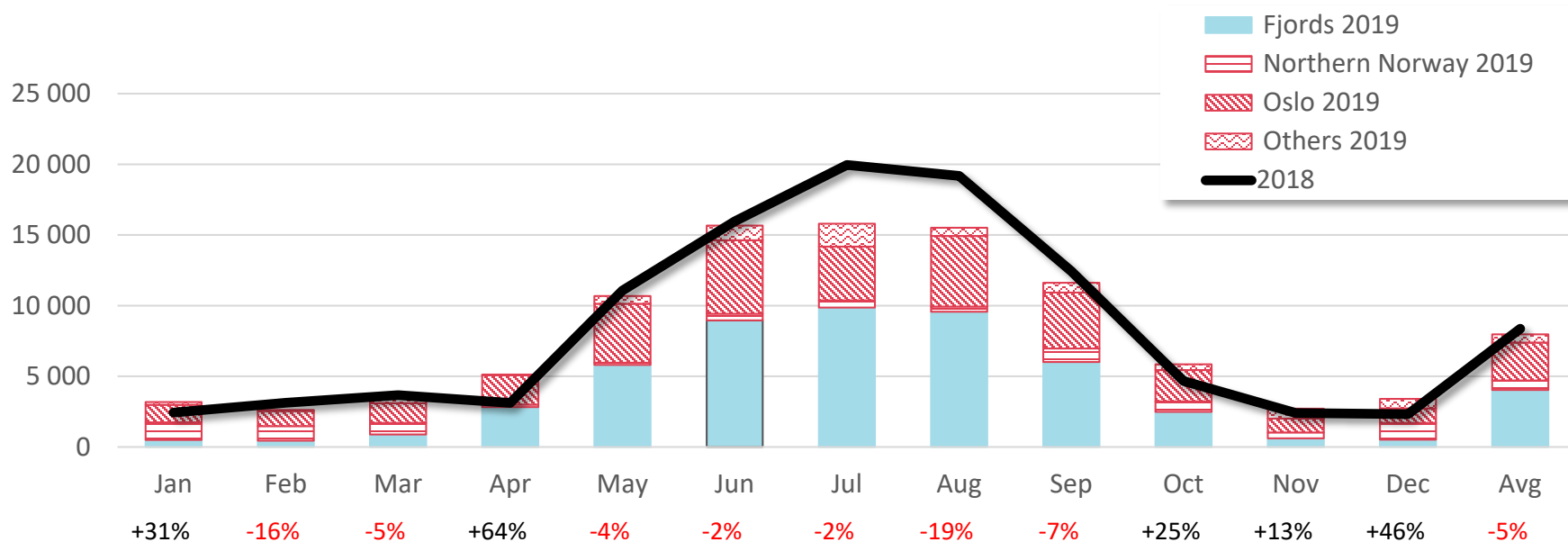


Japan 2020

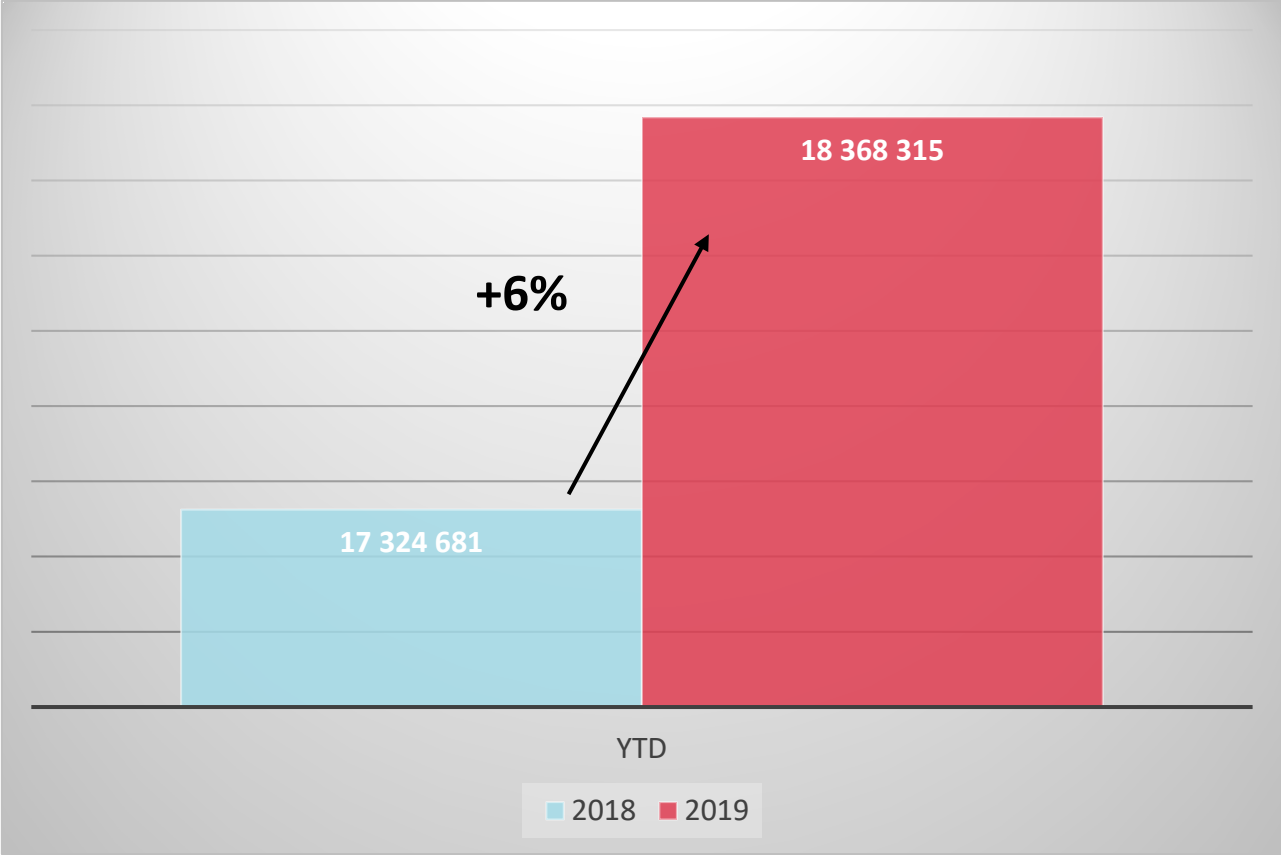
Market Insight

Visitor Statistics Japan 2019

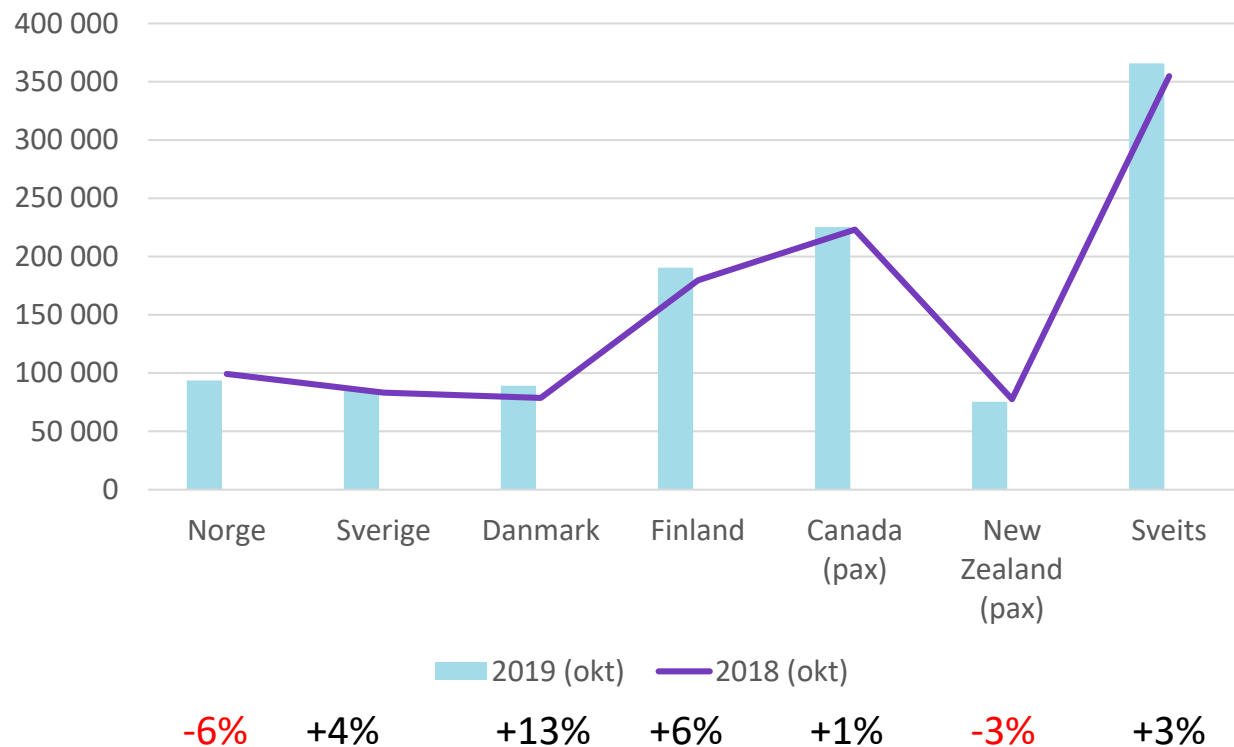
2019 vs 2018



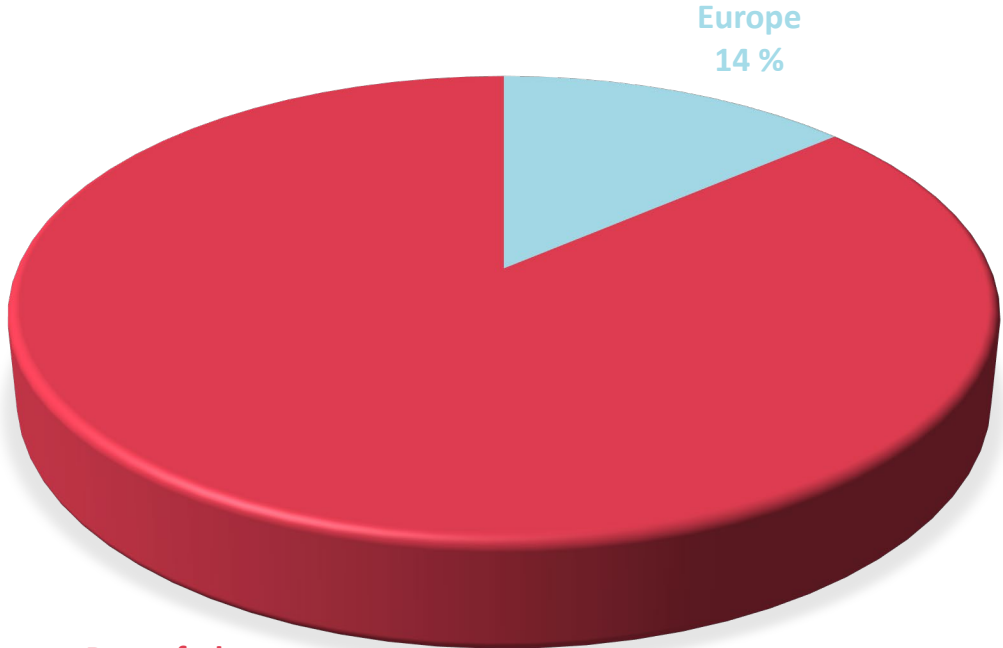
Market situation: overall departures YTD NOV19



Market situation: Norway vs other destinations

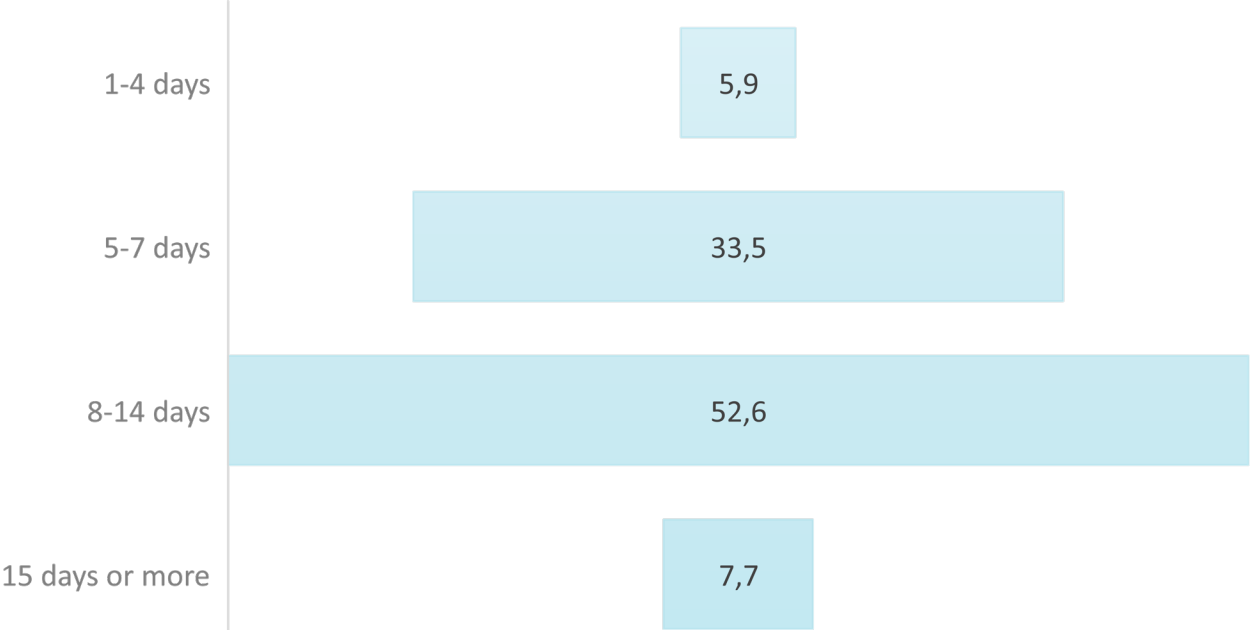


Market situation: Europe's market share

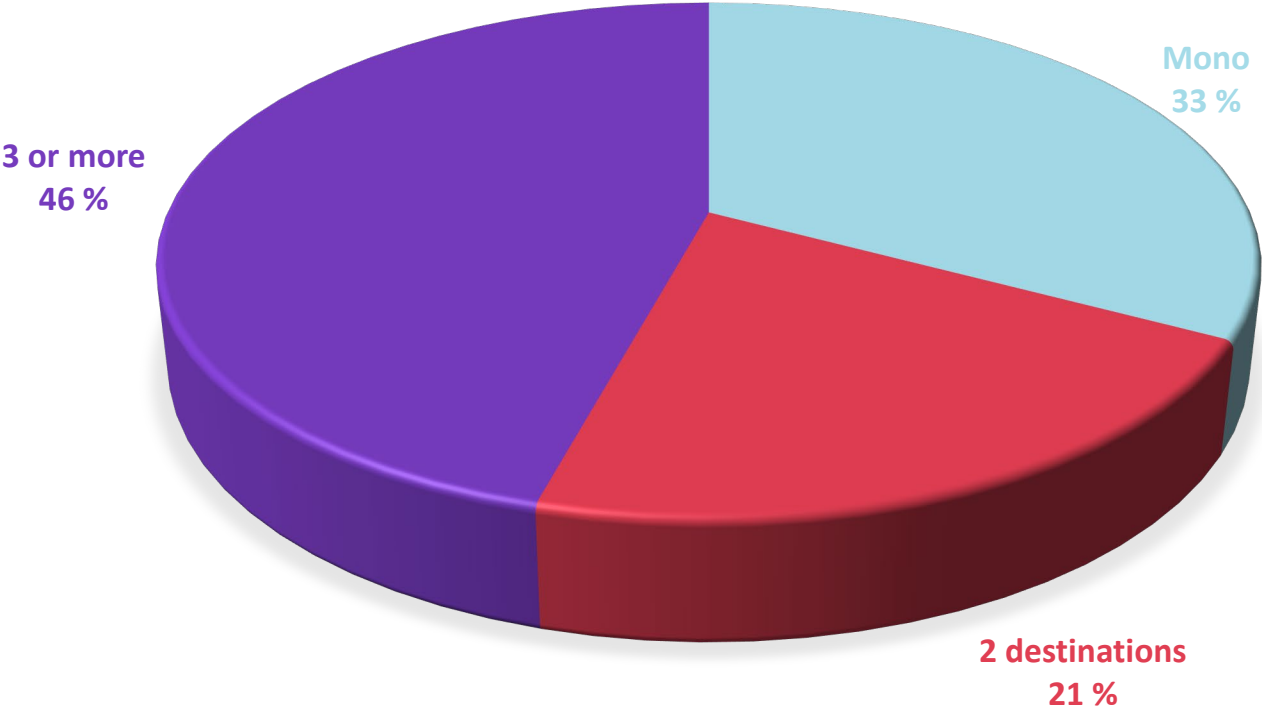


Rest of the world
86 %

Market situation: travel duration



Market situation: mono or multiple destinations?

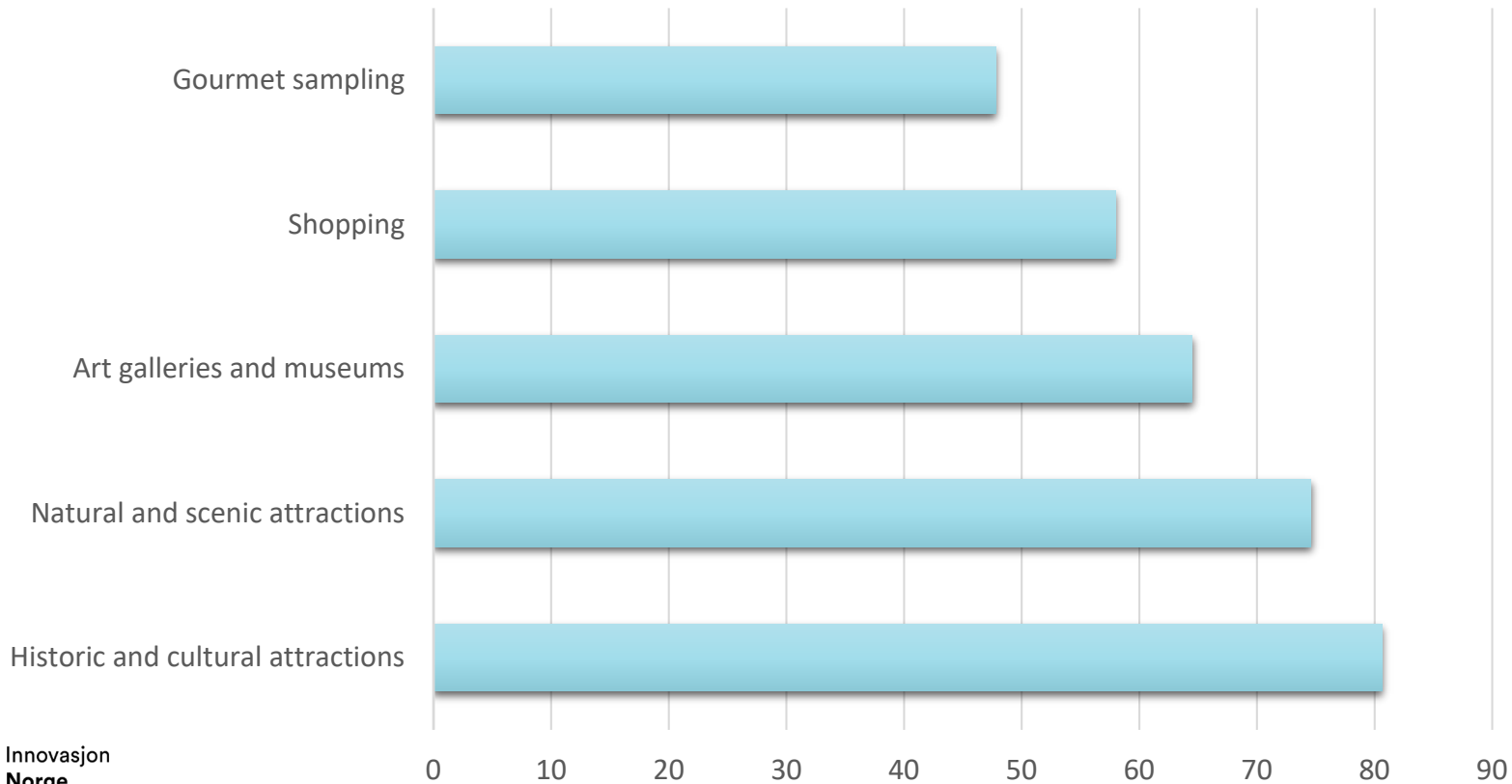


Market situation: who do they travel with?

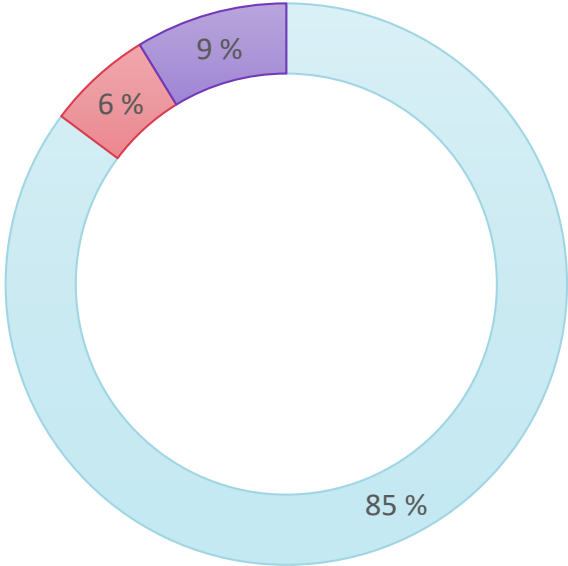
- Husband and wife: 35.6%
- Family/relatives: 16.4%
- Friends/acquaintances: 16.1%
- Alone: 22%



Market situation: top 5 activities



Market situation: expenditure



■ Average tour cost for travel in Europe ■ Local transportation ■ Shopping

Market situation: triggers



Tour operator pamphlets: 39.6%



Recommendations: 23.7%



Internet: 26.8%

Market situation: booking methods



INTERNET: 68%

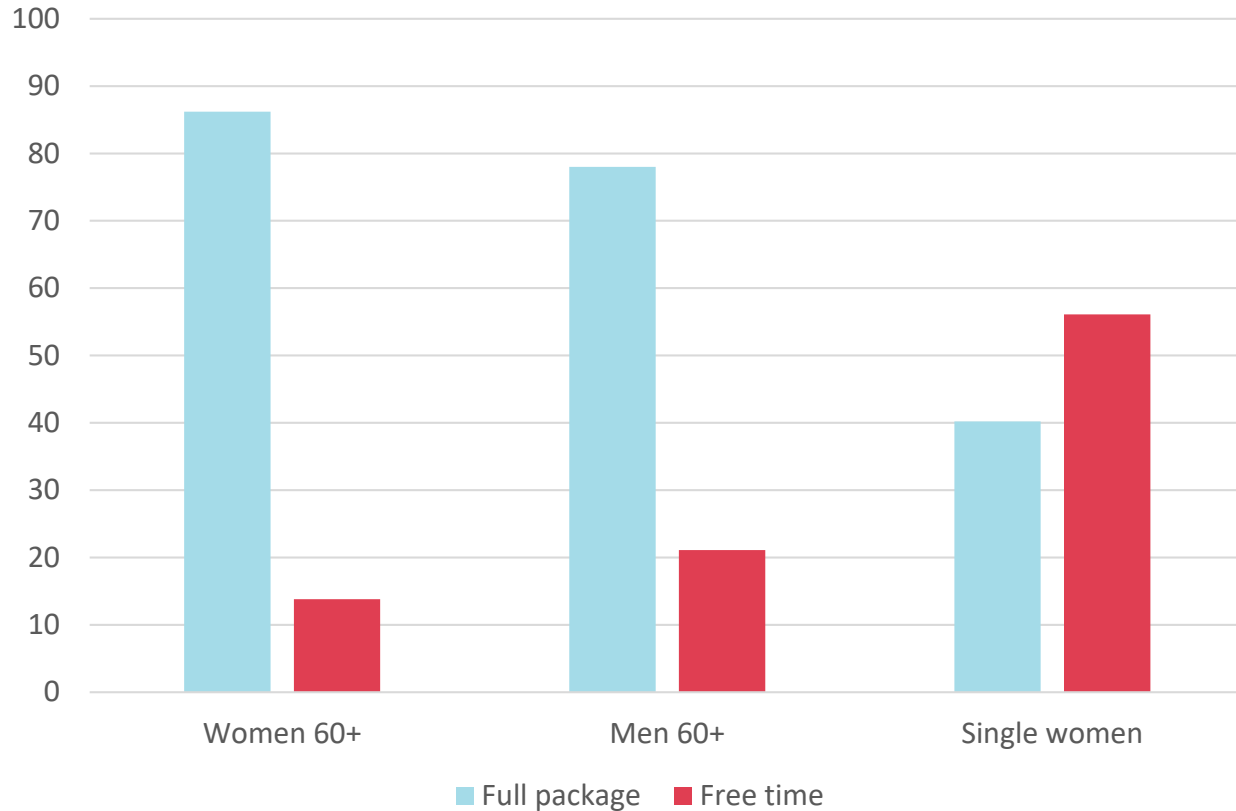


BRICK AND
MORTAR: 18%

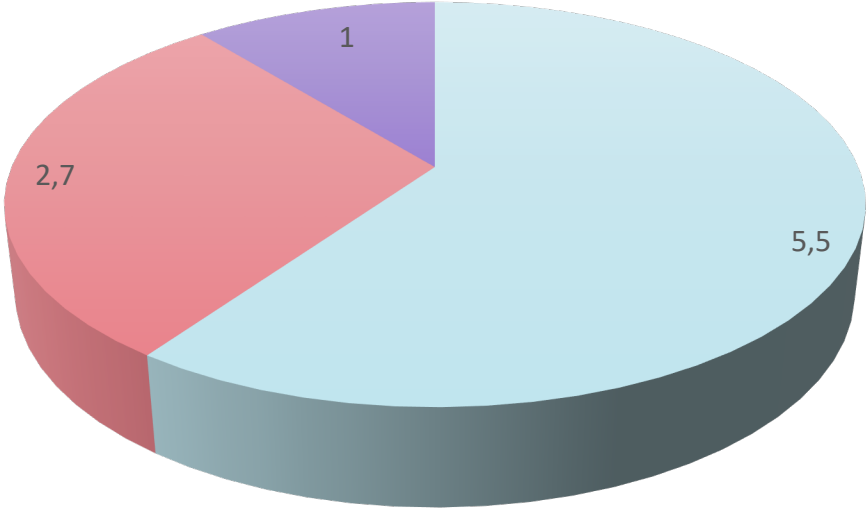


MAIL ORDER/CALL
CENTERS: 7.8%

Market situation: full package versus free-time package



Market situation: who desires Scandinavia?



Married women 40+ Married men 40+ Single women

Market situation: Scandinavia's position



2018: 10TH PLACE



2019: 13TH PLACE

Trade lingo difference



In Japan: travel agency = tour operator/travel agency



In Japan: wholesaler = tour operator selling series tours directly or through travel agencies



In Japan: tour operator = land/incoming operator

Opportunities and challenges



- New routes into Norway via Helsinki by Finnair/Widerøe to Bergen, Tromsø and Trondheim
- Nordic lifestyle still a mega-trend in Japan



- Raising of consumption tax from 8% to 10% in OCT19
- 2020 Tokyo Olympics



Tusen takk!
www.innovasjon norge.no