“Japow”
Now and the Future

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Freeride World Tour
Japow = Japan + Powder
Ski movies with footages of Japan

2009

2012

2012

2012

2014

2015

2015

2015
# of domestic skiers and snowboarders

Source: Japan White Paper on Leisure
Population decline, an aging society

Source: Cabinet office, Gov of Japan
Snow in Japan is a natural resource as valuable as Oil in the Middle East.

Yoshiharu Hoshino
CEO, Hoshino Resorts

Source: http://hoshinoresort.com/mag/kounou/vol2.html
Attracting skiers from abroad is a key to revitalize the ski industry and our economic growth.
The number of people stay in Nagano by countries

Taiwan
Australia
Asia
South East Asia
North America
Europe

*Asia=China, Korea, HK
SEA=Singapore, Thailand
North America=US, Canada
EU=UK, Germany, France
source: Nagano Tourism Statistics
Skiers are in the West

North America: 18mil

Europe: 60mil
  to Nagano: 0.04mil
  to Hokkaido: 0.24mil

Asia: 10mil
  to Nagano: 0.05mil
  to Hokkaido: 0.06mil

Australia: 0.5mil

*The number of skiers is estimated by multiple statistics and survey sources: International Report on Snow & Mountain Tourism, Nagano Tourism Statistics, Hokkaido Tourism Statistics

→: skiers inflow to Japan
What’s behind the numbers?

Off-piste Trend

Evolution of gears
Ski Mountaineering

# of entries of ISMF racers rankings on the seasons

*ISMF: International Ski Mountaineering Federation

Photo: La Sportiva
“A brand for dedicated mountain athletes”

Sales of DYNAFIT

$70mil (2015)

$3.5 mil (2003)

Source: DYNAFIT
Alpine/AT hybrid boots that are defined as alpine DIN boots with a walk/ski mode that can be converted to an AT/Touring sole for backcountry.

Source: SIA RetailTRAK™ Data produced by Leisure Trends, a NPD Group Company, carryover not included.
To be the world’s favorite skiing brand, we need to be a strong player in the backcountry touring world.

Markus Rehrl
Product Manager, Atomic

“We deeply believe this is not just a trend.”

Niclas Bornling
Marketing Manager North America,
Black Diamond

*2012
Source: http://backcountryskiingcanada.com/forums/view/gear-talk/greg-hill-on-salomon-backcountrys-going-big-1/
What we need to do

1. Promotion
2. Education
What we need to do

1. Promotion

2. Education
Ski destinations attract foreigners faster than the whole of Japan

The # of foreign tourists divided by those in 2011

Source: Hakuba Tourism, JNTO, Hokkaido Government Shiribeshi General Subprefectural Bureau
*Numbers of Hakuba and Niseko area are those between 1st Dec~31st Mar
We have more variety than just “Powder”

35 out of 47 prefectures has at least 1 snow area with natural snow

# of snow areas with natural snow

- > 1
- >10
- >20
- >70

*Snow area means ski terrain with one or more lifts
Hakuba
3,000 riders in 2015
(expected to be doubled in 5 years)

140mil accumulated TV viewers in 2014
What we need to do

1. Promotion

2. Education
Accidents on mountains increase

Source: Japan National Police Agency
Our mission

PR with understanding of our target skiers’ culture while advocating the fun and safety of backcountry in Japan

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APPENDIX
Snow sports participation by discipline in North America

Source: SIA RetailTRAK™ Data produced by Leisure Trends, a NPD Group Company, carryover not included.
World Premier, Small World, Level1 productions in September 2015
More people need exercise and some want to challenge