

UNWTO/WTOTF

City Tourism Performance Research

Report for Case Study “Tokyo”



Note: This document is a working paper

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Background

This report was prepared as part of the UNWTO-WTCF Tourism Research Survey on City Tourism Performance. Tokyo has been considered as one of the cities worldwide participating in this Research Survey. To assess the cities performance, UNWTO-WTCF City Tourism Performance Research Survey devises five key performance areas: Destination Management, Economic Perspective, Social and Cultural, Environmental Perspective and Technology & New Business Models.

Considering the availability of data as well as in consultation with some stakeholders, the Economic Perspective was selected as the only key performance area discussed in this report. In this key performance area, Tokyo's tourism trend as well as its economic impact has been discussed in detail. However, it should be noted that the data for some indicators within in the Economic Perspective is not available/or may not directly applicable to Tokyo. In this case, the data at national level was considered as a proxy data to Tokyo.

The data for this report were collected from official data sources through exhaustive desk-based research as well as interviews. Physical interviews were conducted with Tokyo Metropolitan Government and Tokyo Chamber of Commerce.

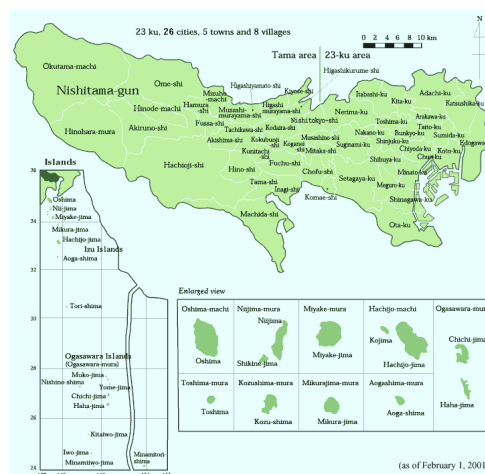
I. Introduction to Tokyo – The City

With the population of 13.5 million, Tokyo is one of the largest metropolitan areas in the world. Tokyo is located in Kanto region on the southeastern side of the main island Honshu and covers a large area of 2,190 sq.km.

The city is the seat of Government of Japan as well as home of the Japanese Royal Family. In 1603, Shogun (General of the SAMURAI) Ieyasu Tokugawa set the government in this area, formally known as "EDO". The city changed its name from EDO to Tokyo when the Emperor MEIJI moved his seat from the old capital of Kyoto in 1868.

The Tokyo Prefecture consist of the 23 Special Wards of Tokyo (each governed as an individual city), 39 municipalities in the western part of the prefecture (TAMA area) and the two island chains; IZU islands and OGASAWARA islands, registered as the UNESCO World Natural Heritage Sites in 2011. Tokyo is offering a great variety of experiences to tourists from all over the world ranging from urban life to great nature experiences.

Figure1.1 Map of Tokyo prefecture



Source: Tokyo Metropolitan Government

It is known that Tokyo is one of the world's richest urban agglomerations that generates around JPY 94.9 trillion (EUR 655 billion), which accounts about 19.4% to Japan's GDP (FY2014)¹. According to the Global Power City Index², Tokyo was ranked 3rd among 42 major cities in the category of "economy" when evaluated in terms of "economy", "R&D", "cultural interaction", "livability", "environment", and "accessibility". The city is a hub for heavy and light industries as well as highly diversified manufacturing base. Significantly, corporations with headquarters or production sites in other parts of the country often have large offices in Tokyo.

Tokyo has a mix of ultramodern and traditional tourist attractions ranging from neon-lit skyscrapers to historic temples that contributes to the city's reputation as one of the most popular international tourist destinations. Visitors often feel attracted by its urban landscape, unique culture, natural beauty and sophisticated transportation infrastructure.

Transport Infrastructure

The city has a cutting-edge transport infrastructure, comprising an airport, road and public transport, and railway serving to domestic and international visitors. Tokyo Prefecture has 2 major international airports: Narita and Haneda International Airports. Narita International Airport, located 60km from the central Tokyo, remains the leading airport for international arrivals. Though Haneda International Airport used to be known solely for domestic flights, recently it has

¹) Tokyo Metropolitan Government (2016), Situation of Surrounding Tourism, Tokyo

²) Yamato, N., Hori, N., Ito, K., Dustan, P., and Isogaya, H. (2016), 'Key Findings of the GPCI-2016', *GLOBAL POWERCITY INDEX 2016* [electronic database], 20, Tokyo, pp.1-3

been growing much faster in terms of international traffic. Considering 2020 Tokyo Olympic and Paralympics Games, Haneda airport's terminal 2 will open up its international flights from March 2020. Immigration, customs and quarantine facilities will be added to meet its international requirement.

Tokyo has the most sophisticated and modern rail and underground (subway) network. In Tokyo there are over 10 railway companies, and provide over 60 lines. Tokyo station is the center of the bullet train network that link Tokyo with other flagship destinations in the country such as Kyoto and Osaka. Considering the Olympic Games ahead, East Japan Railway is involving in Olympic-triggered construction. The company plans to pre-open a train station between Tamachi and Shinagawa stations in 2020. In addition, JR East is renovating seven other stations in Tokyo, which will be closest JR station to the main stadium.

Key Attractions:

According to the research by TripAdvisor³, 5 attractions in Tokyo were listed among the Top 30: Akiba Fukuro Shinjuku Gyoen National Garden, Edo-Tokyo Museum, Meiji Jingu Shrine and Ryogoku Kokugikan.

The following are key attractions in Tokyo:

Temple and Shrine

- Zojoji (Temple): Important cultural monument, preserved as the perfect example of Japanese Buddhist temple architecture. During the Edo period, the Temple was the Tokugawa's family place of worship (ruled from 1602-1867).
- Meiji Shrine: Meiji Jingu is a Shinto shrine. Shinto is called Japan's ancient

³) Top 30 Attractions in Japan by International travelers 2017

original religion, and it is deeply rooted in the way of Japanese life. Emperor Meiji passed away in 1912 and Empress Shoken in 1914. After their demise, people wished to commemorate their virtues and to venerate them forever.

Figure1.2 Ueno-onshi-koen Park



Source: Tokyo Convention & Visitors Bureau

Japanese garden/park

- Imperial Palace (Kōkyo): The current Imperial palace is located on the former site of Edo Castle, a large park area surrounded by moats and massive stone walls in the center of Tokyo, a short walk from Tokyo Station. It is the residence of Japan's Imperial Family
- Hama-rikyu Gardens: The garden is a typical example of the famous gardens of the Edo Period. This Edo Period pond was a tidal pond that depended on the intake of seawater from Edo Bay.

Figure1.3 Rikugien Garden



Source: Tokyo Convention & Visitors Bureau

- Shinjuku Gyoen National Garden: The Park has many types of trees, flowers and a great greenhouse with wonderful orchids and tropical plants. Well known spot for Hanami (Cherry blossom viewing)
- Showa Kinen Park (Tachikawa city): One of the biggest park where visitors can enjoy athletics, barbeque, pools, fireworks and watching flowers
- Asukayama Park: A popular spot for viewing cherry blossoms.

Theme park

- Tokyo Disney Resort®: one of the leading theme parks that attracts more than 30 million visitors a year
- LEGO LAND: (Odaiba): shows all of Tokyo's top attractions made from LEGO®

Zoo

- Ueno Zoological Gardens: one of the oldest zoos in Japan.
- Tama Zoological Park: One hour from central Tokyo by train, is a unique zoological park, where animals are displayed under naturalistic and spectacular habitats set up in its vast land of 52 ha (129 acres).

Area

- Asakusa: a popular district in Tokyo that offers pedestrianized streets, old-style accommodation, food outlets, temples, etc. Akihabara: One of the busiest shopping center for electronic goods and Anime (Manga) goods. Also Akihabara Fukuro, nice looking place with many different kinds of owls is also popular.

Figure1.4 Asakusa Sensoji Kaminarimo



Source: Tokyo Convention & Visitors Bureau

- Shibuya Scramble Crossing: One of the famous crowded intersection

Figure1.5 Shibuya Crossing



Source: Tokyo Convention & Visitors Bureau

- Tokyo Tower: One of the famous towers in the city that serves millions of visitors

Figure1.6 Tokyo Tower



Source: Tokyo Convention & Visitors Bureau

- Roygoku Kokugikan: Traditional indoor arena for Sumo wrestling

Event/Festival

- Metrock (music festival): Outdoor Metropolitan Rock festival in spring
- Tokyo Marathon: one of the biggest marathon competitions in Japan,

Figure1.7 Tokyo Marathon



Source: Tokyo Convention & Visitors Bureau

- Fireworks mainly during summer; Sumida, Jingu-gaien

Figure1.8 Sumidagawa Fireworks



Source: Tokyo Convention & Visitors Bureau

Aquarium

- Aquariums: Unique showcase of variety of sea animals.
- Sunshine Aquarium: Located on a rooftop of a 40m tall building in Tokyo
- Sumida Aquarium: Close-up views of penguins and fur seals at once

Museum

- EDO-TOKYO MUSEUM : A museum to learn the culture and history of Edo
- Samurai museum in Shinjuku
- Aqua Park: Learning about the high quality of water of Tokyo and tasting
- Ghibli museum: Provide guests with Ghibli world

Things to do/see

- Yakata –bune: Japanese style cruise with longstanding history
- Izakaya!: Casual Japanese style bar
- Robot restaurant (Shinjuku)
- Shinjuku VR Zone: The new virtual reality facility in the entertainment Tokyo
- Imperial Running spot: Running spot around the Imperial Palace
- Christmas illuminations around Tokyo Metropolitan areas

Figure1.9 Roppongi Illumination



Source: Tokyo Convention & Visitors Bureau

A. Economic Perspective

A.1. Tourism Flows

A.1.1. Number of Arrivals

According to the statistics of Japan National Tourism Organization (JNTO)⁴, the number of tourist arrivals (both domestic and international tourists) to Tokyo has been increasing over the last 12 years in absolute terms. The number of international arrivals went down to negative growth rate in 2009 mainly as a result of the collapse of Lehman Brothers in 2008. Later in 2011, a 31% decline in international tourist arrivals and 8.8% in domestic arrivals occurred mainly due to the tsunami, earthquake, and the subsequent nuclear disaster striking the country.

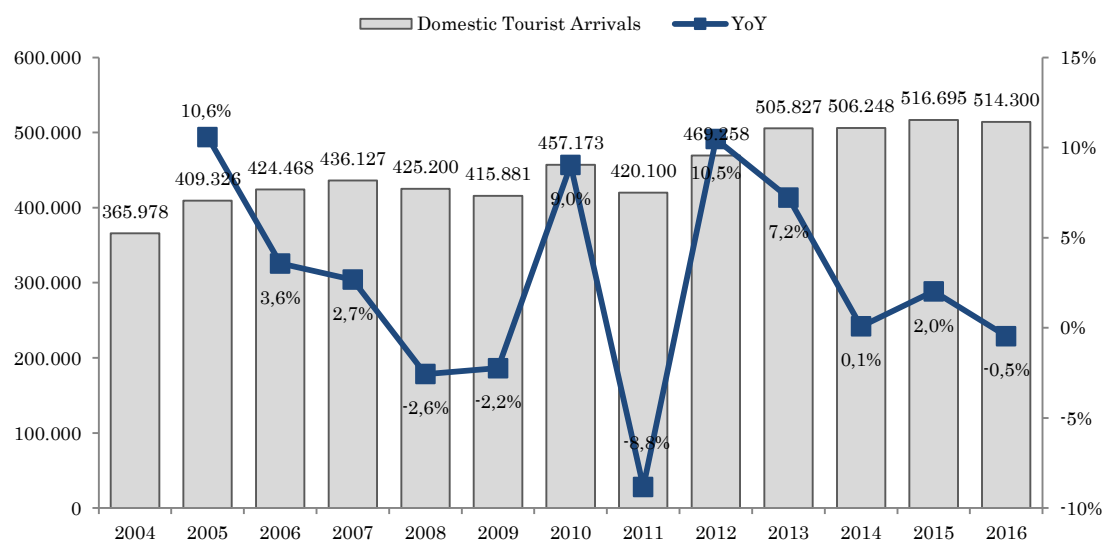
Soon after this natural disaster, a rapid rebound in the tourism industry has been recorded. The international arrivals growth rate reached its maximum peak in 2012 when it increased by 36%, whereas the domestic arrivals went up by 10%.

According to Euromonitor International⁵, Tokyo is attracting about 51% of international tourists arriving to Japan followed by Osaka, with about 24% respectively. Euromonitor stated that the increasing trend of international tourists to Tokyo is often contributed by the increase in airline seat capacity, increase in low-cost flights, and visa relaxations.

4) Japan National Tourism Organization (2017), The number of foreign tourists, JNTO, Tokyo

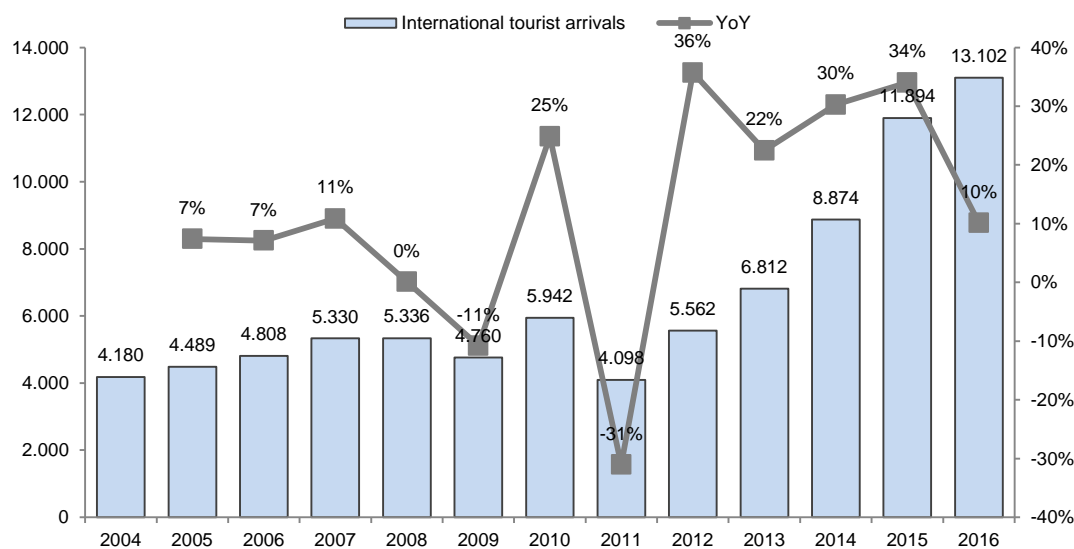
5) Euromonitor International (2014), CITY TRAVEL BRIEFING: TOKYO, pp.10

Figure1.10 Domestic Tourist Arrivals to Tokyo (in 1,000)



Source: Japan National Tourism Organization (2017)

Figure 1.11 International Tourist Arrivals to Tokyo (in 1,000)



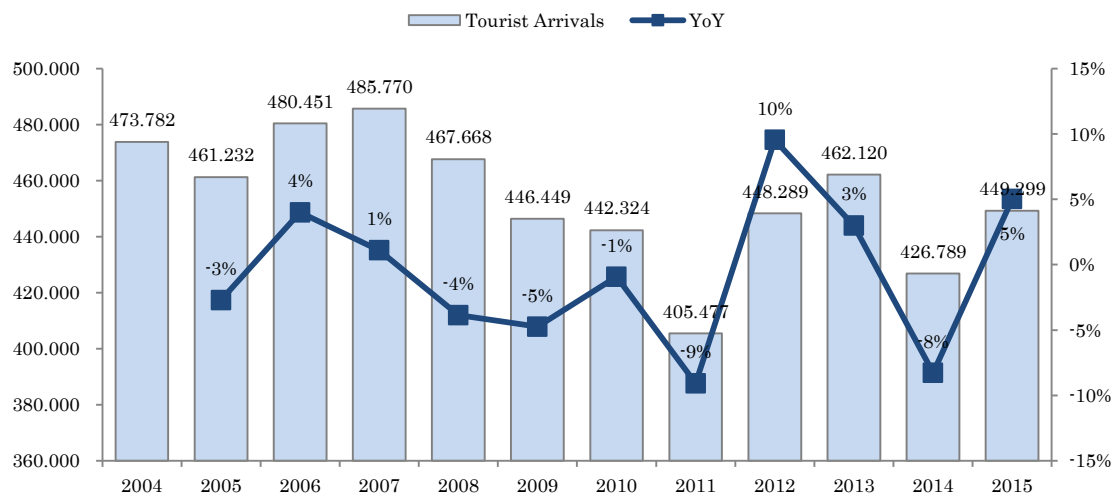
Source: Japan National Tourism Organization (2017)

Regarding the tourist arrivals to the surrounding island areas, the arrivals for Ogasawara and Izu islands are presented in the figure below. These islands are located south of Tokyo and technically considered as part of Tokyo. It is known

that Ogasawara Islands were registered as a Natural World Heritage Site in 2011.

Though international tourist arrivals to Tokyo City has a rapid growing trend (especially after 2012), the number of arrivals to these island destinations is characterized by up-down trends. Attracting tourists to the island areas is still remains to be considered a challenge for Tokyo Government.

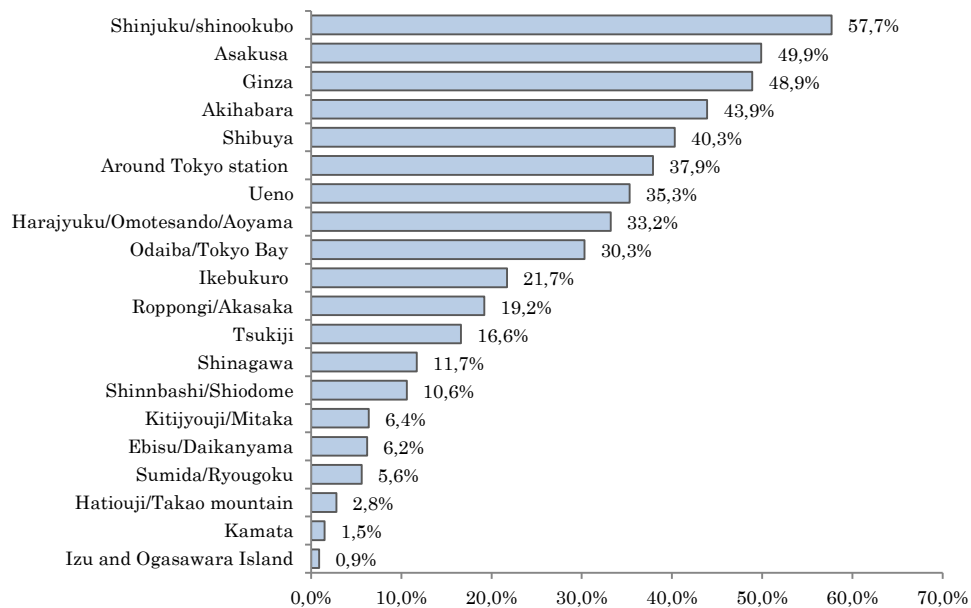
Figure 1.12 Total Tourist Arrivals to Izu and Ogasawara Islands



Source: Tokyo Metropolitan Government (2016)

Tokyo Metropolitan Government (2016b) published a study that shows the most visited tourist spots by international tourists. It indicates that in 2014, the top five mostly visited places were Shinjuku & Shin-Okubo, Ginza, Asakusa, Shibuya, and Akihabara. These places are located in the central Tokyo area and characterized by shopping, food outlets, electronic goods and, luxury brands.

Figure 1.13 Most Visited Spots in Tokyo, 2014 (%)



Source: Tokyo Metropolitan Government (2016)

A.1.2. Duration of Stay

Around 34.6% of international tourists in Tokyo stayed 4 - 6 nights. Travelers from Taiwan Province of China account the largest share in this category with more than 50% stays 4 - 6 nights in Tokyo. It should be noted that this data is consistent with the national statistics that shows around 53% of the international tourists to Japan are stay for 4 - 6 nights.

The term “same-day” refers to day trippers who visited Tokyo from other destinations in Japan. The same should be considered for tourists arriving from the long-haul source markets and staying only 1-2 stays and Tokyo is just one destination in the Japan round trip itinerary.

Table 1.1 Duration of Stay in Tokyo by Country (% , total of 12,069 persons interviewed)

	Same-day	1 night	2 nights	3 nights	4-6 nights	7-13 nights	14-20 nights	Over 21 nights	Average night
Total	4.5	9.6	18.8	17.7	34.6	9.8	1.4	3.1	6.3
Rep. of Korea	2.8	9.3	22.2	26.3	30.6	4.9	0.8	2.6	5.8
Taiwan Province of China	3.3	7.2	13.4	13.2	50.2	9.1	0.6	2.7	6.1
China	5.9	14.8	27.3	15.2	23.5	7.1	1.5	4.2	7
Hong Kong, China	2.9	4.9	14.6	19.5	45.2	10.8	0.5	1.2	5
Thailand	6.6	7.2	20.0	22.1	30.5	8.9	1.5	2.1	5.8
Singapore	2.3	7.3	11.2	15.4	42.2	19.2	0.0	1.6	5.4
Malaysia	7.8	6.5	16.7	15.9	36.3	13.3	2.3	0.7	4.6
USA	7.0	8.7	12.4	15.0	35.5	15.5	2.2	3.2	6.8
Canada	8.4	5.5	10.2	17.2	32.8	22.7	1.7	0.7	5.9
United Kingdom	4.4	4.7	10.1	15.1	38.8	21.0	3.9	1.6	6.8
Germany	4.7	5.4	6.5	17.7	34.2	22.3	4.5	3.4	6.8
France	4.0	3.7	9.5	12.2	30.6	26.6	6.9	6.2	10
Italy	3.4	1.9	7.1	7.7	44.4	22.7	5.4	6.0	9.5
Spain	2.6	3.7	8.5	11.8	44.4	17.4	4.9	5.8	7.9
Australia	1.4	4.2	8.3	12.8	42.6	25.6	3.2	1.0	5.9
India	12.9	12.7	12.3	12.8	22.4	11.3	2.5	9.2	11.3
Indonesia	6.9	9.1	15.9	18.1	32.3	14.1	0.4	1.8	4.8
Philippine	13.0	5.4	8.6	15.2	38.9	11.7	2.3	4.2	6.8
Viet Nam	6.8	26.5	21.2	16.1	14.0	5.7	1.6	6.9	9.4
Russian Federation	5.8	8.9	5.8	14.3	28.8	22.1	3.4	10.2	11.2
Other countries	3.6	9.1	9.7	15.7	34.6	20.1	2.9	4.3	6.2

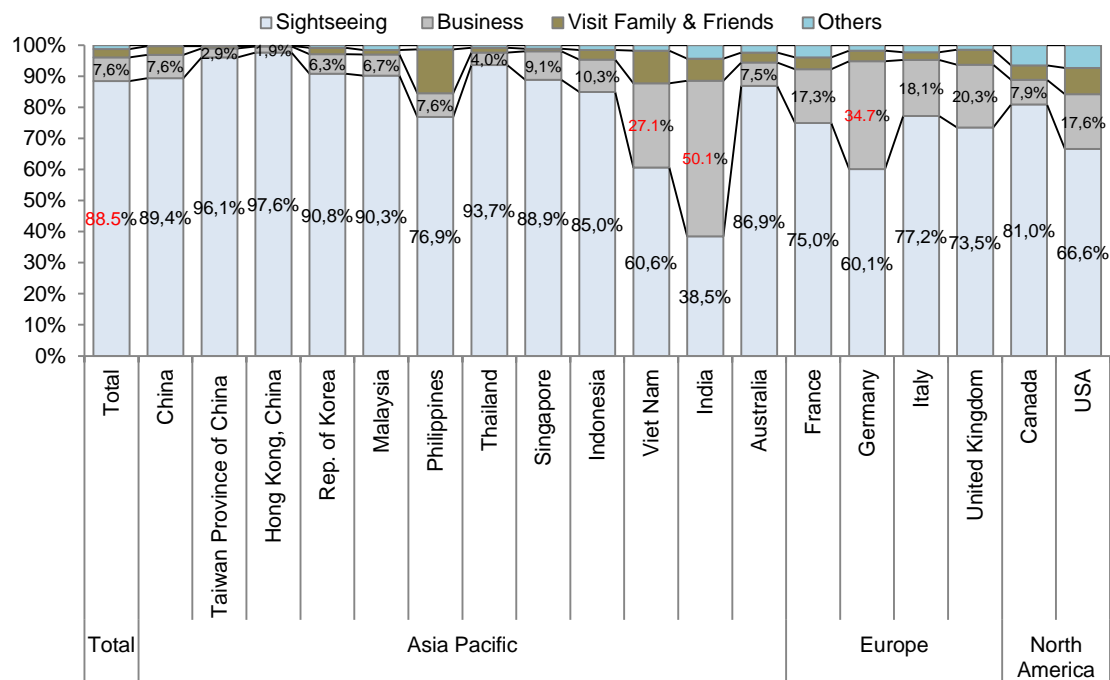
Source: Tokyo Metropolitan Government (2016)

A.1.3. Arrivals by Main Purpose of the Trip and Modes of Transport

Visitors to Tokyo tend to have an active holiday, including sightseeing and visiting different attractions such as amusement parks, museums and art galleries. The data indicates that more than 88% of tourists arriving in Narita and Haneda International Airports are arriving for sightseeing purpose. The percentage of tourists visiting Tokyo for business purposes is higher in countries such as Vietnam, India and Germany.

Though the data for tourist arrivals by modes of transport is unavailable, it is believed that the number of arrivals by air takes the largest lion's share of tourist arrivals to Japan in general and Tokyo in particular.

Figure 1.14 Arrivals by Purpose of Travel 2016 (%)



Source: e-Stat, Portal Site of Official Statistics of Japan

A.1.4. Average Size of Travel Party

Even though the data for average size of traveling party is unavailable, the majority of visitors to Tokyo are traveling with their family. The data shows that around 28% of travelers to Tokyo visit with their families followed by visitors traveling with a friend which accounts around 23%. This figure is statistically consistent with the national data which is among the total arrival to Japan; around 33% of them are visiting with their families.

Unlike travelers from Asian market, traveling with family accounts smaller percentage among travelers from European source markets. However, exceptionally, the majority of Indian travelers to Tokyo are solo travelers.

Figure 1.15 Travel Party by Countries, 2015 (%)

	Alone	Partner	Family	Cowokers	Friends	Other
Average	20.8	11.5	28.5	16.7	23.2	1.4
Rep. of Korea	26.1	4.7	16.5	21.2	30.3	2.5
Taiwan, Province of China	14.7	11.1	40.8	10.7	25.1	0.8
China	15.3	10.5	36.8	19.8	18.8	1.2
Hong Kong, China	21.3	15.9	33.2	10.8	21.0	0.1
Thailand	13.5	13.9	29.0	18.0	28.6	1.3
Singapore	21.6	15.2	26.7	8.3	30.0	1.0
Malaysia	23.7	12.2	18.0	18.3	25.9	0.8
USA	34.6	19.0	16.5	15.9	15.1	1.1
Canada	29.2	25.4	17.0	6.8	24.3	2.3
United Kingdom	40.3	21.3	12.8	10.7	14.7	1.1
Germany	41.1	16.2	11.6	20.6	11.1	0.5
France	27.6	22.7	18.5	11.8	19.4	2.2
Italy	31.0	26.1	8.8	13.6	18.5	0.4
Spain	21.5	28.9	15.0	12.4	24.2	0.0
Australia	18.4	29.1	16.4	4.5	32.2	0.6
India	55.9	6.3	7.4	19.5	9.0	2.5
Indonesia	19.0	11.3	20.4	28.4	18.2	1.9
Philippines	19.7	12.3	38.2	13.6	16.6	0.4
Viet Nam	24.9	7.1	7.4	37.9	15.6	7.2
Russian Federation	39.8	9.5	16.7	17.5	17.6	0.6
Other countries	32.3	15.0	13.2	19.0	20.4	2.4

Source: Tokyo Metropolitan Government (2016)

A.1.5. Seasonality Index and Accommodation Occupancy Rate

The fact that Tokyo is regarded as a global financial hub as well as attractive leisure destinations, the city does not significantly experience blatant seasonality pattern in tourist arrivals. With the exception of the peak periods during the cherry blossoms and autumn foliage seasons, demand is seem to be relatively constant throughout the year.

There were 700 hotels with about more than 100,000 hotel rooms in Tokyo city as of 2014. According to HVS⁶, the supply of hotel accommodation in Tokyo has historically remained stable with a low compound growth of 2% between 2005 and 2014. The HVS report indicated that hotel room supply in Tokyo rose from

6) HVS (2016) In Focus Tokyo Japan

approximately 87,380 to 100,000 rooms in 2014.

During the last two years, new hotel openings were spread across the central Tokyo area. This expansion was partly contributed by the strong expansion of midscale hotel development such as APA Hotels & Resorts' with six hotel openings, totaling 1,800 rooms, and all of them concentrated in the central Tokyo area. Further into the future, in preparation for the Olympics, it is expected to see an increased hotel development activity in the areas proximate to the Olympic Village such as Shiodome.

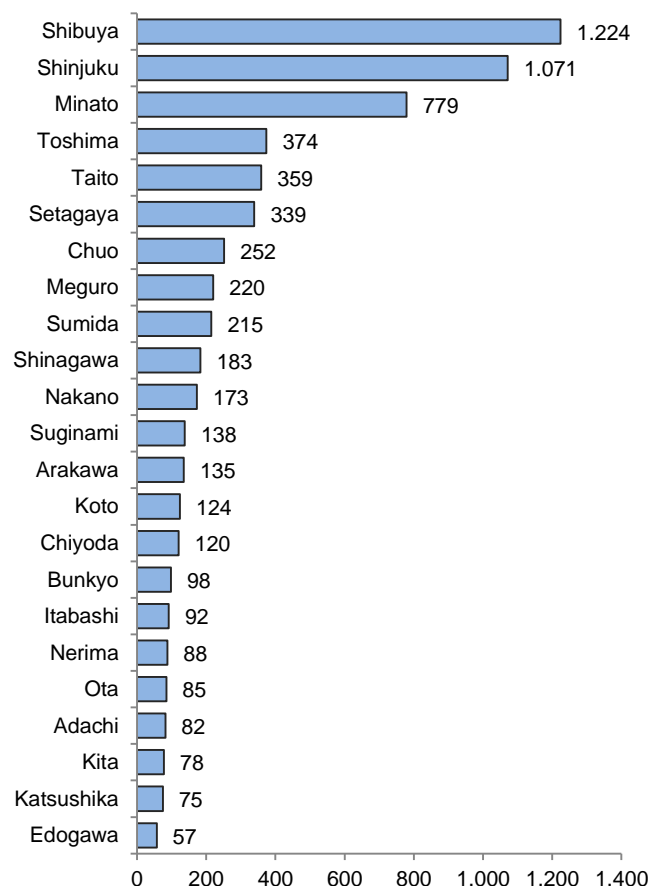
Table 1.2 Plan for new open hotels near Tokyo area, 2017

Name of Hotel	Area	Expected year
Four Seasons Hotel	Tokyo	2020
Odakyu Gotema Hotel (tentative)	Kanagawa	2020
Hyatt Place Tokyo Bay	Chiba	2019
APA Hotel & Resort (Yokohaya Bay Tower)	Kanagawa	2019
Hotel Mets Akihabara (tentative)	Tokyo	2019
APA Hotel Asakusaekimae	Tokyo	Aug. 2018
APA Hotel Nihonbashi Bakuroyokoyama	Tokyo	Aug. 2018
APA Hotel & Resort Nishishinzuku	Tokyo	May., 2018
APA Hotel Nihonbashi Makurochoekimae	Tokyo	April, 2018
APA Hotel Hacchohori Sinthomicho	Tokyo	March, 2018
APA Hotel Kandaekimae	Tokyo	Feb., 2018
Hyatt Centric Ginza	Tokyo	2018
Hotel Keikyu Tsukijiginza	Tokyo	2018
Tokyo Bay Tokyu Hotel (tentative)	Chiba	2018
Hotel Vista Premil Tokyo	Tokyo	2018
Tokyo Moxy Kinshiho	Tokyo	Nov., 2017
APA Hotel Asakusa Kaminarimoon	Tokyo	Nov., 2017
APA Hotel Iidabashi mae	Tokyo	2017

Source: HOTERES Online (2017)

Airbnb has also a significant presence in Tokyo. Shibuya, Shinjuku and Minato Wards are the top three leading wards in Tokyo in terms of concentration of Airbnb listings. It is known that this year June Japan's legislature approved a new law allowing Airbnb hosts to rent homes and apartments in the country.

Figure 1.16 Number of Airbnb Listings in Tokyo by Wards, 2016



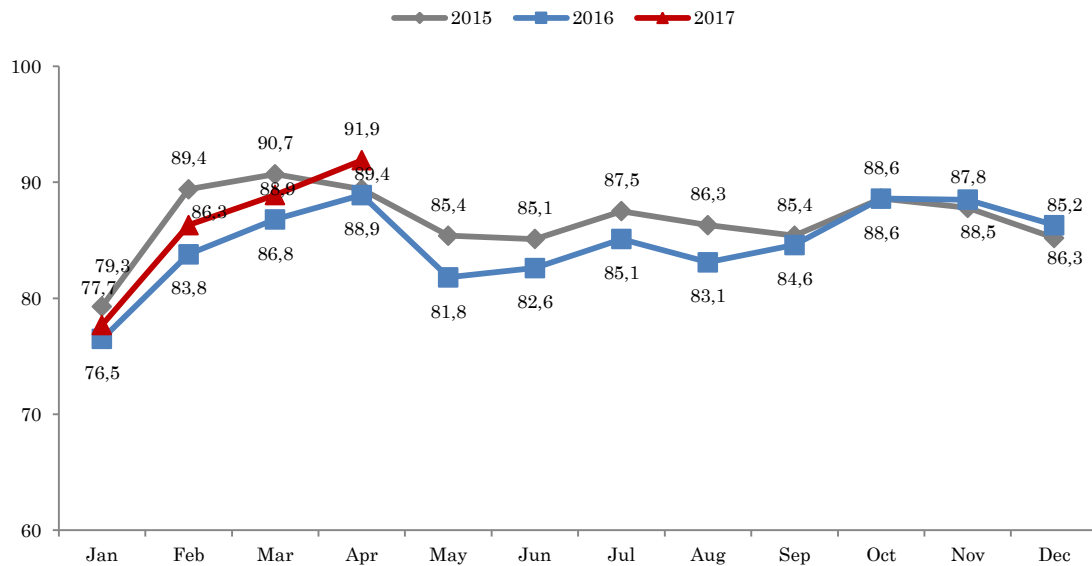
Source: Tomslee (2015)⁷, Airbnb downloadable data sets

As for the occupancy rate, the STR⁸ data indicated that there is a long-term upward trend in hotel occupancy rates in Tokyo. As of 2016, April and November are the two peak seasons when hotel occupancy rates reach its max.

7) Tom slee is a database that provides Airbnb listings by cities

8) STR Global (2015-2017), Japan Hotel Review, available at: www.strglobal.com/ (02-08-2017)

Figure 1.17 Accommodation Occupancy Rate in Tokyo (%)



Source: STR (Smith Travel Research) (2015-2017)

Note: the data after April 2017 is not available

The HVS report (2016) also shows that Tokyo is performing well in terms of occupancy rate of the limited supply growth in the luxury hotel segment. Most of these luxury hotels are located in the business districts and shopping areas in Tokyo.

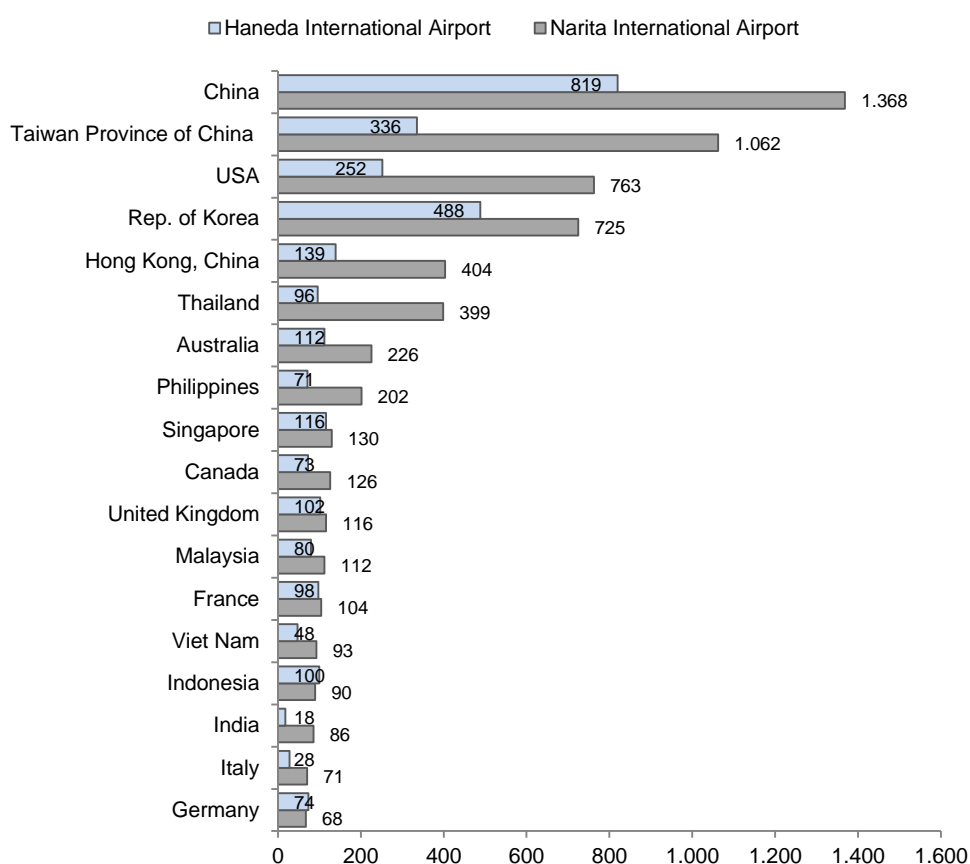
A.1.6. Number of Major Incoming Markets

The number of foreign passengers entering Narita Airport and Haneda Airport, which are the major airports around Tokyo, is 10.8 million in 2016. This is 43.4% of the 23.1 million foreign passengers entering Japan through national airports and ports.

In 2016, the Haneda International reached 3.26 million foreign passengers arrival. Narita International Airport received 6.82 million international passengers

arrival the same year. Currently, Haneda International Airport has offers 60,000 international flight slots (arrival and departure) per year , but plans to increase the slots for international flights to 99,000 slots per year so that in 2020 when the Tokyo Olympic and Paralympic Games are held. The number of foreign passengers by country based on Narita and Haneda International Airport in total 2016, China ranks first (2.1 million), Taiwan Province of China 2nd (1.4 million), Republic of Korea in third place (1.2 million) and the United States of America in the fourth place (1 million). After that, Hong Kong, Thailand, Australia, the Philippines, Singapore, the UK and France follow.

**Figure 1.18 Number of major incoming markets by arriving airports, 2016
(in 1,000)**



Source: e-Stat, Portal Site of Official Statistics of Japan

A.1.7. Number of Same-day Visitor

The number of same-day domestic visitors (excluding Tokyo residents) to Tokyo has been growing at the lowest annual compound growth rate of 4% since 2011 compared to the number of same-day foreign-based visitors to Tokyo; that grew at more than 22% of annual compound growth rate.

The number of same-day foreign-based visitors to Tokyo has been growing rapidly partly as a result of increasing in international arrivals to neighboring local airports. Arrivals from Rep. of China and Rep. of Korea to neighboring local airports such as to Mt. Fuji Shizuoka Airport and Ibaraki Airport can be considered as a good example.

Figure 1.19 Number of same-day domestic visitors to Tokyo (except Tokyo residents) (in 1,000)

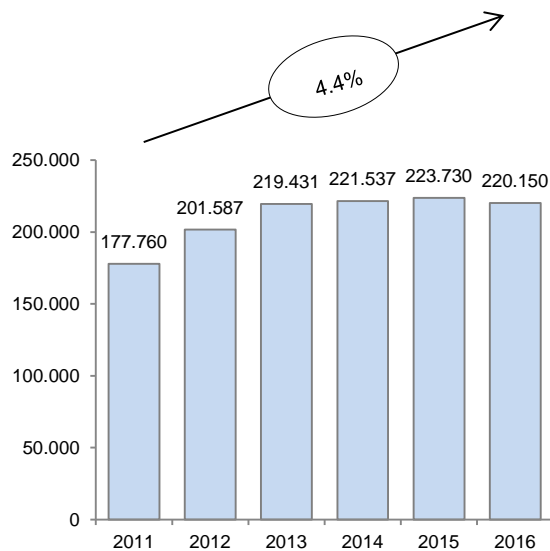
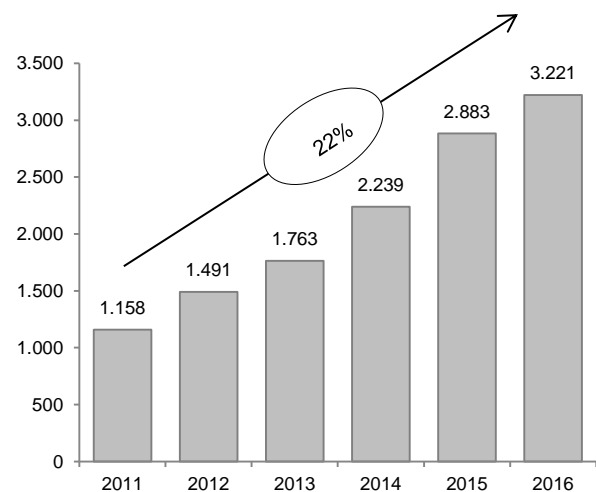


Figure 1.20 Number of same-day foreign-based visitors to Tokyo (in 1,000)

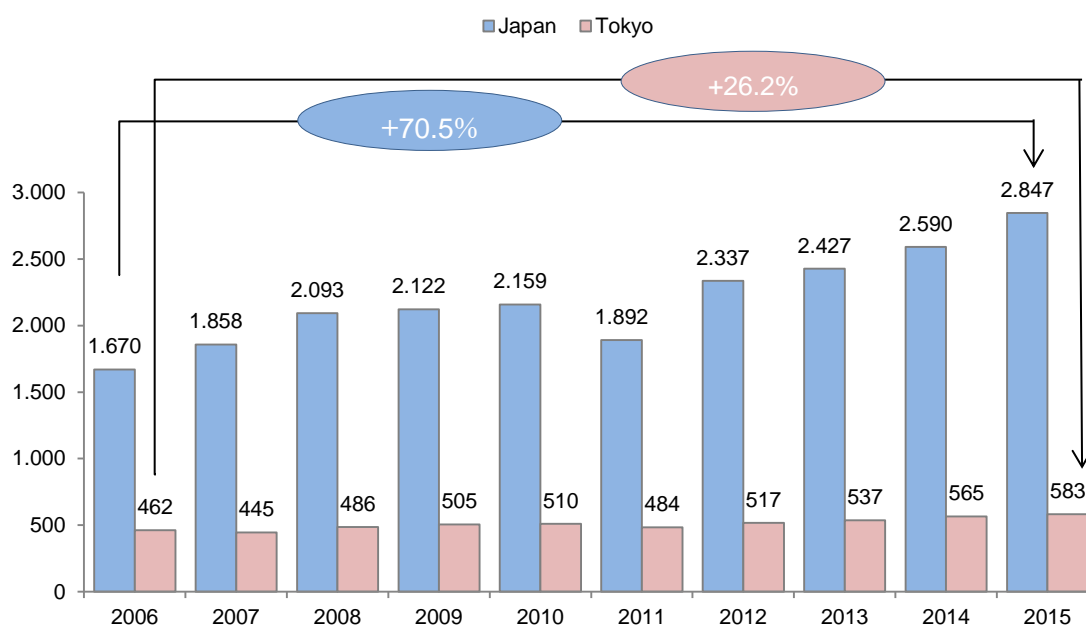


Source: Tokyo Metropolitan Government (2016)

A.1.8. Meetings Industry Statistics

The number of international conferences held in Tokyo Prefecture increased by 26% from the year of 2006. Meanwhile, the number of international conferences held nationwide in Japan over the same period increased by almost 71%, since the rural municipal governments have actively promoted the acquisition of international conferences recently. The plan to expand or improve the capacity for international conferences in the Tokyo Metropolitan Area would need to be carefully observed in order to catch up with the international demand along with the given capacity of accommodations.

Figure 1.21 The number of international conference in Japan and Tokyo



Source: JNTO Statistics of the International Conference of Japan (2015)

Japan National Tourism Organization has defined that international conferences in Japan should meet all the conditions and requirements described below since 2007.

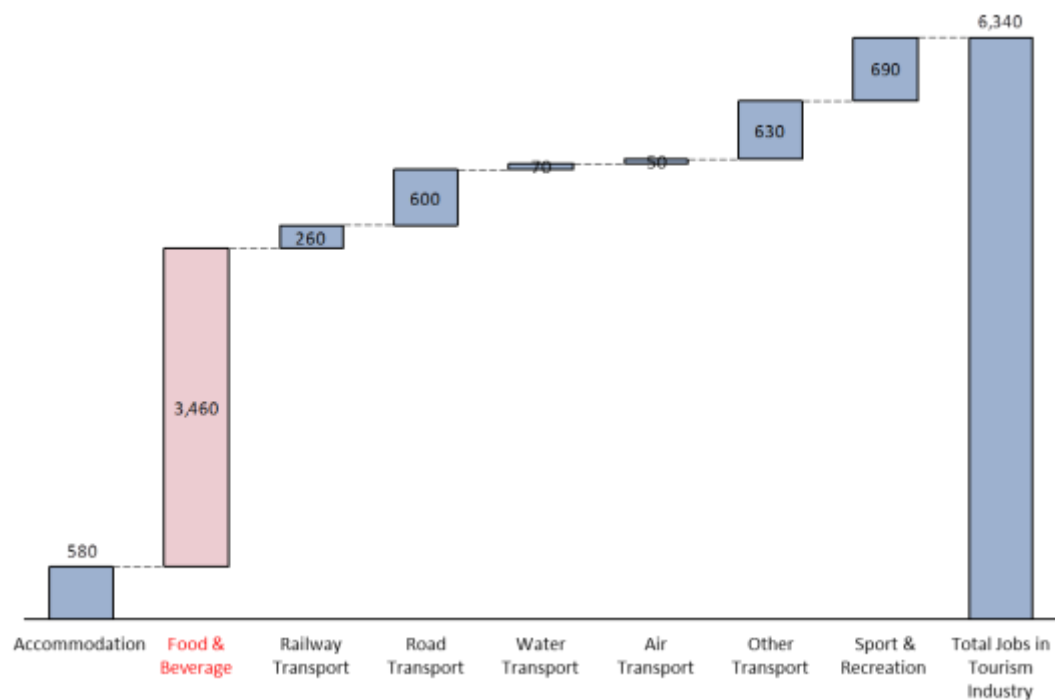
1. Organized by either the international institution and organization including regional, national and subnational offices, or the Japanese national institution and organization. The conference which is aiming at pursuing the interests and profit of the particular entities would not be eligible.
2. Its participants should be more than 50 people and above.
3. The participants should be from more than three countries including Japan.
4. The duration of the conference is more than 1 day.

A2. Economic Impact

A.2.1 Number of Jobs in Tourism Industry

Though the specific data for Tokyo is unavailable, data by Japan Tourism Agency⁹ indicates that there are 6.3 million jobs¹⁰ directly related to tourism activities in Japan. Among these jobs, the food & beverage sector contributes the biggest share, which is 3.4 million jobs. Sport & recreation and road transport are the second and third largest sectors in terms of the number of jobs, respectively.

Figure 2.1 Number of tourism related jobs in Japan, 2015 (in 1,000)



Source: Japan Tourism Agency (2017)

9) Japan Tourism Agency (2017) Research study on economic impacts of tourism in Japan

10) Jobs in the tourism industry are referred to as all businesses including freelancers engage in the tourism industry

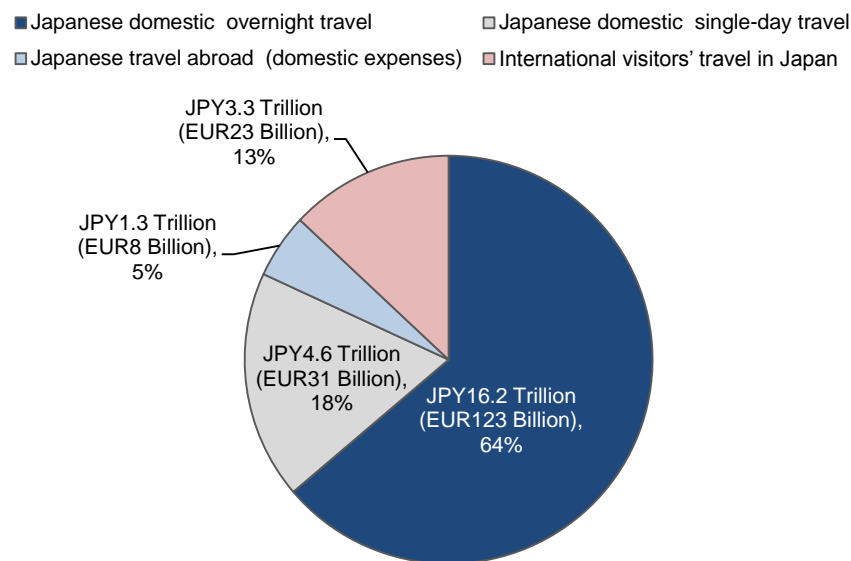
Several government stakeholders including Tokyo Chamber of Commerce play a vital role in terms of strengthening jobs in the local economy. According to the interview with Tokyo Chamber of Commerce¹¹, small and medium enterprises, including those engaged in the accommodation, restaurant and other tourism related services have been given various supports in order to keep them competent in the industry. Some of these supports include employment, financial, legal, and other professional supports.

A.2.2. Relative Contribution of Tourism to the Destination's Economy (% of GDP)

The consumption of travel and tourism industry contributes about JPY 25.4 trillion (EUR 193 billion) to the GDP in 2015 as it was only JPY 23.8 trillion (EUR 178 billion) in 2010. The Japanese domestic overnight travel and day trip solely contributes more than 82% of the total contribution. On the other hand, consumption by international visitors (inbound consumption) almost doubled from JPY 1.3 trillion (EUR 10 billion) in 2010 to JPY 3.3 trillion (EUR 24 billion) in 2015. International tourism is recognized as a significant driver for growth in the Japanese economy and is expected to continue playing an important role in economic revitalization at national and local level.

11) Interview was conducted with a person in charge from Tokyo Chamber of Commerce on July, 2017

Figure 2.2 Travel & Tourism Contribution to Japanese Economy, 2015



Source: Japan Tourism Agency

A.2.3. Percentage of Tourism Jobs that are Seasonal¹²

The data of the employment in the tourism sector of Tokyo is not available though, the survey conducted by “the Service RENGO” which is the leading organization of labor unions of Japanese Tourism and Hotel industries gives us the clues about the present situation of employments issues in the tourism sectors. According to their survey regarding the number of workers in the tourism sectors in 2016, 60% of the total workers are contracted on the permanent contract basis (normally until 60 years old), meanwhile 40% of the total workers have contracted based on the fixed term basis and 64 % of fixed terms workers have contracted based on the less than one year contract.

12) The fact that the term “seasonal jobs” in the tourism industry is not practically applicable in Japan, in this indicator the number of permanent and fixed term contract employment is discussed.

Table 2.1 The employment in the tourism sectors of Japan

		2013	2014	2015	2016	% in 2016
A. Permanent contract		47,137	47,693	48,869	49,204	60%
Fixed term contract	1 year above	10,864	11,550	11,943	11,553	(36%)
	1 year below	21,765	21,323	20,803	20,786	(64%)
B. Fixed term contract (subtotal)		32,629	32,873	32,746	32,339	40%
C. Grand total (A+B)		79,766	80,566	81,615	81,543	100%

Source: Service Rengo, Soshiki Jittai Chosa (2017)¹³

A.2.5. Economic Impact of Events

Though the data for total number of events in Tokyo is not available, number of events (exhibitions) that have been held in the Tokyo Big Sight, one of the largest convention and exhibition center in Tokyo, is indicated in the graph below. Tokyo Big Sight has more or less consistent number of events (exhibitions) every year. There were a total of a 304 events (exhibitions) held in 2016.

In order to promote events (exhibitions) in Tokyo, Tokyo Metropolitan Government has some support schemes both for the organizers as well as organizations promoting events (exhibitions). According to the interview with Tokyo Metropolitan Government¹⁴, it was stated that the government is providing a financial support to organizers in order to promote their event outside Japan.

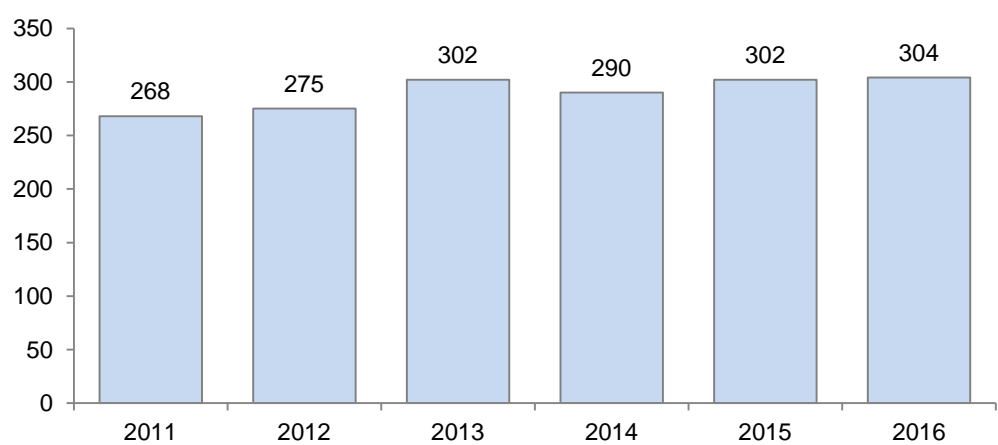
In addition, the Tokyo Metropolitan Government is working to promote the use of venues such as art museums and gardens and MICE facilities in Tokyo as unique venues. In line with this effort, the Tokyo Convention & Visitors Bureau

13) The survey was conducted in February 2017 by Service RENGO (The Japan Federation of Service and Tourism Industries Worker's Unions) for 173 unions members of Service Rengo and received its replies from 104 members

14) The interview was conducted with Tokyo Metropolitan Government in July 2017

has created pamphlets aimed at local and overseas businesses, showcasing these unique venues and the aspects of Tokyo's charm they reveal

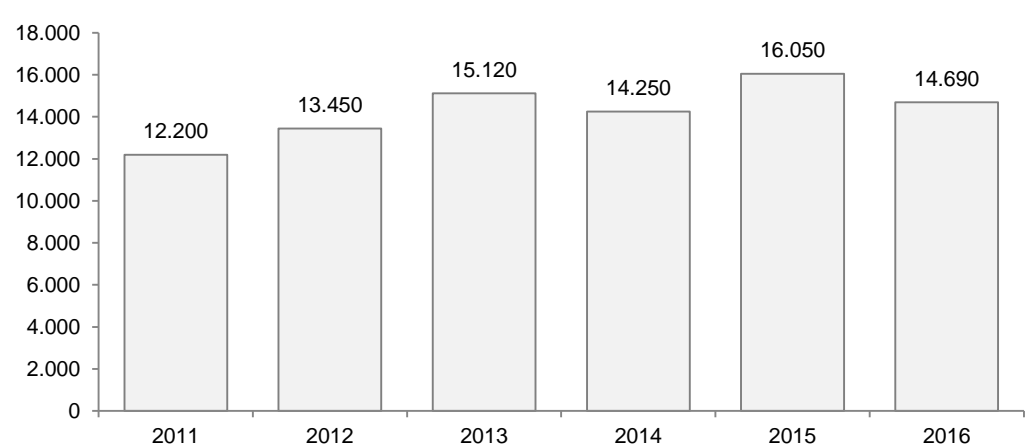
Figure 2.3 Number of Events (exhibitions) at Tokyo Big Sight



Source: Tokyo Big Sight Inc. (2017)

Looking at the number of participants in the same convention center discussed above, Tokyo Big Sight, more than 14.6 million participants have participated in 2016.

Figure 2.4 Number of Event participants at Tokyo Big Sight

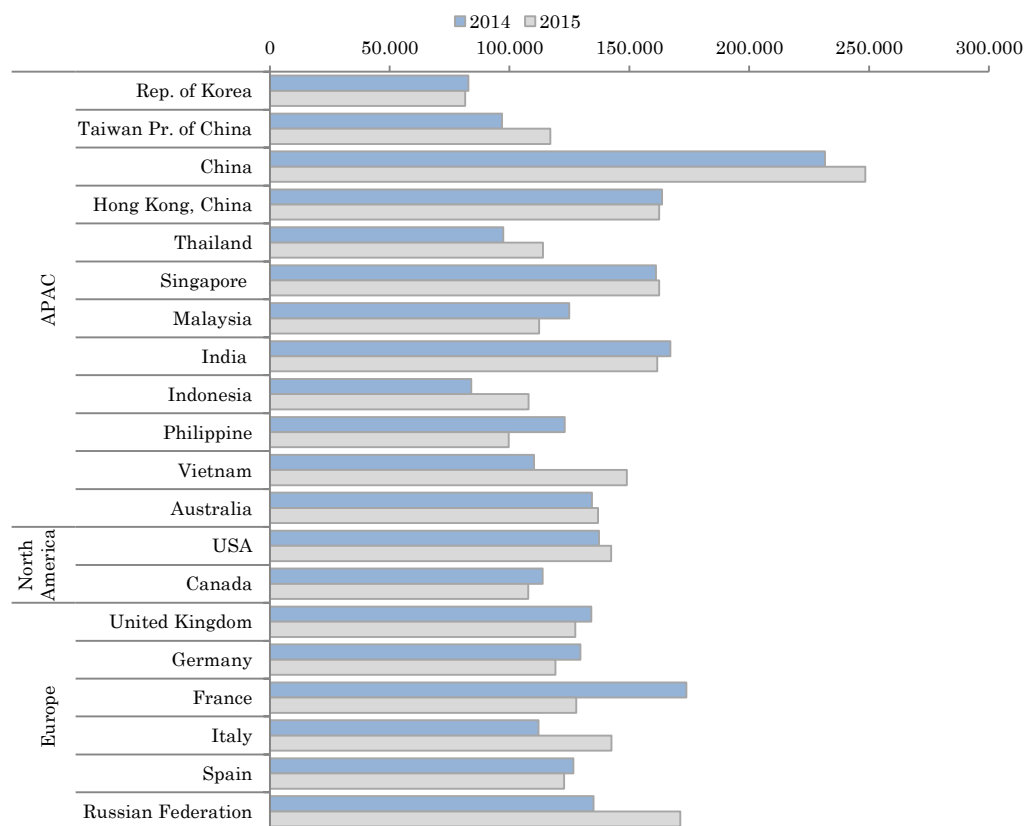


Source: Tokyo Big Sight Inc. (2017)

A.2.6. Inbound Tourism Revenues per Visitor by Source Market

The average consumption by foreign tourists in Tokyo was JPY 151,626 (EUR 1,160) in 2015, 12.3% up from the previous year. Chinese travelers spend higher than average compared with countries in Asia Pacific and other regions as well. In the Asia Pacific region, Hong Kong, China, Singapore, and India ranks in the next position in terms of expenditure. In the case of travelers from European source markets, Russian Federation spend relatively higher compared to their counterpart European source markets.

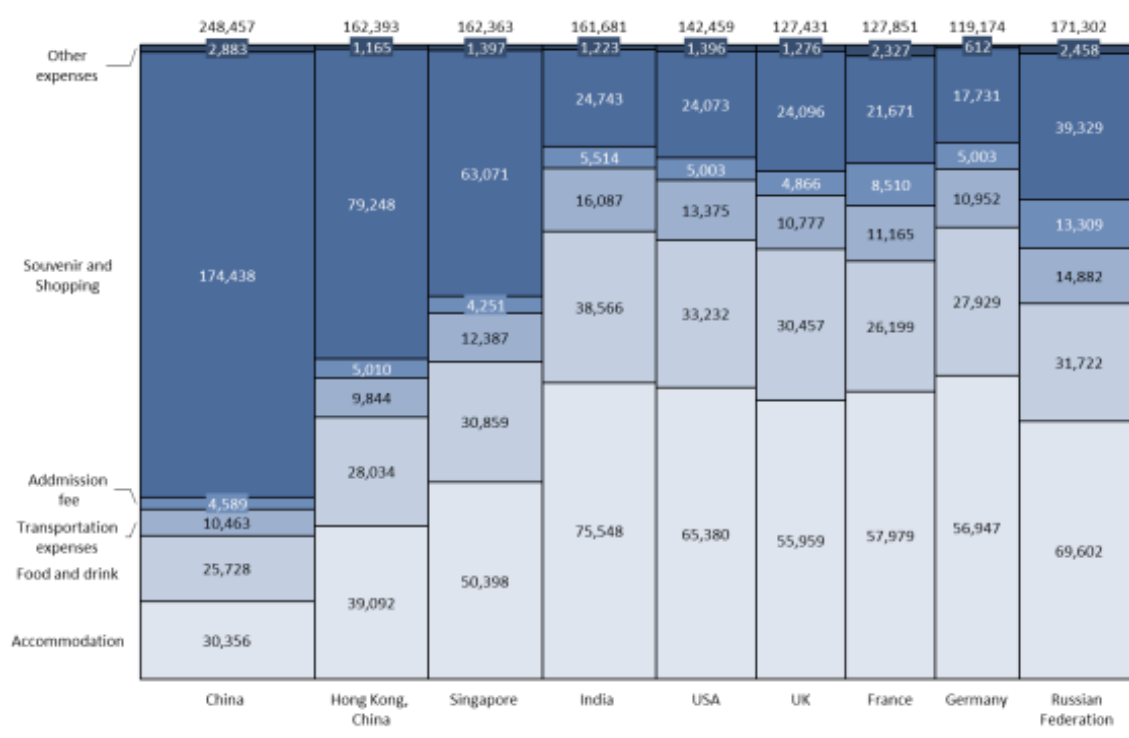
Figure 2.5 Tourism Revenues per visitor by selected source markets (JPY)



Source: Tokyo Metropolitan Government (2016)

Looking at the breakdown of the revenue per tourists in Tokyo by the selected source markets, the earning on souvenir and shopping is higher from the majority of tourists from Asia (China and Hong Kong and Singapore in particular). More than 70% of the Chinese travelers' spend on souvenir and shopping purposes. Exceptionally, Indian travelers spend lesser on the souvenir and shopping segment compared to their Asian counterparts. As for accommodation revenue, the revenue is higher from tourists of long-haul source markets such as tourists from North America and Europe.

Figure 2.6 Breakdown of tourism revenue per visitor by selected source markets, 2016 (JPY¹⁵)



Source: Tokyo Metropolitan Government (2016)

¹⁵) 1 Euro is equivalent to 130 Japanese yen

A.2.7. Daily Spending per Same-Day and Overnight Visitors

According to data provide by the Tokyo Metropolitan Government, foreign visitors that traveled to Tokyo for overnight business purposes spent relatively more than other segments on a daily basis. Again the daily expenditure of those who are residing out of Japan and visit Tokyo as a day-tripper is higher in both leisure and business categories. On the other hand, those residing in Japan (excluding Tokyo) and visit Tokyo for overnight business purposes spend around JPY 42,104 (EUR 321) on a daily basis, which is higher than same day visitor visitors in both business and leisure categories.

Table 2.2 Daily spending per visitor, 2016

Classification		Type of tourists by their place of residence	
		Japanese Residents (Excluding Tokyo Residents)	Foreign Visitor
Overnight tourists to Tokyo	Leisure purposes	JPY33,456 (EUR255)	JPY91,766 (EUR699)
	Business purposes	JPY42,104 (EUR321)	JPY106,243 (EUR809)
Same-day tourists to Tokyo	Leisure purposes	JPY8,731 (EUR66)	JPY31,135 (EUR237)
	Business purposes	JPY6,680 (EUR51)	JPY30,939 (EUR236)

Source: Tokyo Metropolitan Government (2016)

A.2.8. Percentage of Locally Produced Goods and Services in Tourism Enterprises

Tokyo has been actively promoting consumption and production in Tokyo. There are several restaurants with the plate of “using locally produced ingredients/products” where guests can enjoy special menus containing the freshest ingredients provided by local farmers in Tokyo. Tokyo also publishes a guidebook of those restaurants every year which is available free of charge.

Figure2.7 Label that shows qualified restaurants



Source: Bureau of Industrial and Labor Affairs Tokyo Metropolitan Government
the Department of Agriculture, Forestry and Fisheries

Tokyo Metropolitan Government provides a guidebook of restaurants with “using locally produced ingredients/products”. The followings are some examples;

Restaurants

- *Mikuni MARUNOUCHI (Chiyoda)*: Natural French menu using fresh Tokyo vegetables.
- *Oshiage Yoshikatsu (Sunida)*: From vegetables, fish, meat, Sake, wine to spices, everything is from products from Tokyo.
- *Sinagawa Kasho Kouan (Shinagawa)*: Japanese sweets made from vegetable produced in Tokyo.

Farmers markets

- *Farmers restaurant La Mouri table paysanne (Nerima)*: In addition to the restaurant, they provide farming experience at their own farm.

(Fruits/vegetable picking)

A.2.9. Exports of tourism services

According to the Japan Tourism Agency (2017)¹⁶, Japan's balance of international payments has improved regarding tourism with favorable situation of international tourism and tourism consumption in Japan. Particularly, Japan had a payments surplus in every month of 2015, resulting in a total annual payments surplus of JPY1.9 trillion (EUR15 billion) for the first time in the 53 years since 1962. The surplus further expanded in 2016 to JPY1.3 trillion (EUR7.9 billion).

The inbound tourism expenditure in 2015 is JPY3.3 trillion (EUR23 Billion), 49.8% increasing from the previous year. The rate of the inbound tourism expenditure in exports of goods and services is 3.5% in 2015. It drew 1.1 points increasing from the previous year.

Table 2.3 Inbound tourism expenditure (In billion JPY)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Inbound Expenditure	1,343	1,469	1,434	1,170	1,346	998	1,293	1,650	2,207	3,305
Changes from the previous year	24.4%	9.4%	-2.4%	-18.4%	15.0%	-25.9%	29.6%	27.7%	33.7%	49.8%
Exports of Goods & Services	83,631	93,010	90,730	61,290	75,237	73,343	71,990	80,082	90,135	93,566
Changes from the previous year	13.9%	11.2%	-2.5%	-32.4%	22.8%	-2.5%	-1.8%	11.2%	12.6%	3.8%
Inbound tourism expenditure/Exports of goods & services	1.6%	1.6%	1.6%	1.9%	1.8%	1.4%	1.8%	2.1%	2.4%	3.5%

Source: Japan Tourism Agency (2017), Research study on economic impacts of tourism in Japan

¹⁶) Japan Tourism Agency, (March 2017) Research study on economic impacts of tourism in Japan

II. Showcases: Best Practice Examples

A. Development for Universal Design of Tokyo ~ Friendly to all

More than half a century has passed since Tokyo last hosted the games in 1964. It's a very different city than it was. Many train and subway stations in Tokyo now have an increasing number of elevators as well as public facilities with special bathrooms for those in wheelchairs and parents with babies. There is high expectation that the Tokyo Olympic and Paralympic Games will be an opportunity for the city to become truly barrier-free both physically and emotionally.

The Tokyo 2020 Organizing Committee has published its Accessibility Guidelines with the purpose of the Olympic and Paralympic Games in three years' time to be fully inclusive and accessible to everyone. It is also hoped that the guidelines can act as a blueprint for other Japanese organizations to promote further their accessibility.

The guideline includes the following points of actions;

- Complete measures to provide a higher level of barrier-free access at Tokyo 2020 Games venues.
- Accelerate the installation of platform doors at stations by supporting railway operator initiatives.
- Support municipalities that conduct inspections of buildings with the participation of residents and undertake barrier-free improvements based on opinions provided by the residents.

- Provide support to municipalities that undertake initiatives aimed at promoting the removal of barriers in society and barriers to obtaining information.

Further, various language supports through IT and SNS services by public and private sectors have been developed.

Translation app

- Himawari: Tokyo Metropolitan Medical Institution Information Service
- VoiceTra: Free app provides communication opportunities to enjoy communicating with people around the world. Just speak to "VoiceTra" and translate their own spoken words including 31 different languages. The translation results will be displayed at the bottom.
- Tokyo Hire-Taxi Association "TAKKUN": Official app of the Tokyo taxi association. Beyond the framework of single taxi groups, after message requesting taxi, the closest taxi available running all around Tokyo provides service. Available in 23 Wards of Tokyo, Musashino-city, Mitaka-city, Tama area.
- JAPAN TOURISM FACILITIES ASSOCIATION “Safety Instructions for Hotel and Ryokan” : It is a manual for safety use of hotels and ryokans for foreign visitors, showing what to do in emergencies in multi languages with pictograms.

B. Beyond 2020



Figure2.7 Beyond 2020

Source: Cabinet Secretariat beyond 2020 program

Introduction

“Beyond 2020” is the certification system for cultural programs developed by Tokyo Organizing Committee of the Olympic and Paralympic Games under Cabinet Secretariat of Japan. The first certification was granted in January 2017 and over 70 programs have been certified as of March 2017.

In anticipation of the post 2020 Olympic and Paralympic Games in Tokyo, “Beyond 2020” compiles various types of unique cultural programs throughout Japan to create the legacy for following generations. By certifying the programs as “Beyond 2020 Program” with specific logo, the programs will be recognizable and receive the attention by the general public all over Japan and it will promote neighbourhood tourism in Tokyo.

Any agencies from national, regional and local governments, private enterprises, and non-profit organizations in Japan can apply for the certificate and promote their programs by utilizing the logo.

Figure2.8 Logo of beyond2020



Source: Cabinet Secretariat beyond 2020 program

The “Beyond 2020” logo was designed to express the gesture of approbation such as “like” or “good”. The figure also represents “b” from the word “beyond” or Japanese hiragana character “wa (わ)” which means traditional Japan.

The logo symbolises the inheritance and enhancement of Japanese culture beyond 2020 in harmony with all relevant stakeholders.

The call for logo design was advertised among the undergraduate and graduate students in collaboration with Japan University Consortium of Arts with the purpose of encouraging youth in the field of arts to take part in the “Beyond 2020” activities.

Inclusion

To foster the social inclusion of all parts of the society everyone including people with impairments and visitors from abroad are on board, “Beyond 2020” provides certification for the following programs and activities in order to encourage organizations as well as private cooperatives.

1. Promoting Japanese culture

The programs / activities should promote varieties of Japanese culture such as

traditional arts, modern performing arts, arts with modern technology, designs representing “cool Japan”, contemporary media arts, fashion, gastronomy such as *washoku* (Japanese cuisine) or *sake* (Japanese wine), festivals, traditional crafts, traditional costumes, traditional architectures.

2. Perspective of inclusion

The programs / activities should own the perspective of inclusion to create the legacy towards the matured society for the following generations.

- Programs / activities to remove the barrier for differently abled people.
- Programs / activities to remove the language barrier for overseas visitors.

Followings are some major programs to be highlighted as examples.

Kanuma Autumn Festival (Traditional festival)

Being certified as UNESCO Intangible Cultural Heritage, Kanuma Autumn Festival in Tochigi prefecture which is traditionally organized by local community is now highly recognized by the international tourism market. During the festival, more than 20 carts with traditional carvings are carried to local shrines and court musicians called *Buttuke* are performed opposite. The organizer of the festival made collective effort to develop brochures in four different foreign languages to attract international visitors.

Japan “Kampai” to the world Campaign at the airports (Gastronomy)

The promotional campaign at several international airports to introduce Japanese traditional alcohol such as *sake*, *shochu* and *awamori* has been initiated by Japan Sake and Shochu Makers Association. Tourists at the airport

can taste and inquire about those alcohols at the campaign booth. Bilingual staffs are allocated to meet the needs of international customers.

Figure2.9 Kanuma Autumn Festival (Traditional festival)



Source: Kanuma Autumn Festival Organizing Committee

Figure2.10 Japan “Kampai” to the world Campaign at the airports (Gastronomy)



Source: Japan Sake and Shochu Makers Association

Nichigaku Kokuban Art Koshien Competition ® (Contemporary media arts)

The contemporary art competition using black board (*kokuban*) and colourful chalks has been organized by Nichigaku Co.,Ltd., the private company producing educational equipment such as blackboards. The art competition is

managed by several languages such as English and Chinese for international community to take part in.

Figure2.11 Nichigaku Kokuban Art Koshien Competition ® (Contemporary media arts)



Source: Nichigaku Co.,Ltd

Ozumo “Beyond 2020” Basho (martial arts)

Sumo, the national martial arts of Japan has become one of the major attractions for the international tourists. *Ozumo “Beyond 2020” Basho* was held in October 2016 as a significant kick-off event for “Beyond 2020” program. Over 3,000 audience including overseas visitors and differently abled people are invited at the event with the adequate care such as English brochures and signboards, sign language interpretation and point system interpretation.

C. “Mori no Nigiwai” events

Background

The Tokyo Chamber of Commerce and Industry together with JTB Corp. have been organizing the community based performing art events in Tokyo, named

Mori no Nigiwai, meaning the festivals of sacred woods”, as one of the authorized events of “Beyond2020”. Every community has its own intangible cultural activities which have been handed down from generation to generation. As there are hidden sanctuaries such as the sacred woods in the deep mountains area which people are worshipping as the heart of the local communities, there are intangible activities which is connecting the minds of the people in that region. “MORI-NO-NIGIAWAI” - The performing arts and ritual events based on the local communities carefully selected by tourism experts of JTB Corp. and the Tokyo event in October 2017 will be the 130th of its kind and memorial performances since 1981. It was initiated by the leadership of Mr. TAGAWA, the present chairman of JTB Corp.

Figure2.12 Mori no Nigiwai Tokyo



Source: JTB Corp

Japan has been suffering from the unbalance of its population between urban and rural area and also has been facing with increasing depopulation in some rural areas recently. The Government of Japan under the strong leadership of Prime Minister Shinzo ABE, has been strengthening the tourism sector as the

driver to revitalize the rural communities with public and private partnership. It is important to understand how tourism can create the innovative cycle to attract the people from urban to the rural area. In the above context, this “MORI-NO-NIGIWAI” event in Tokyo is tackling the four challenges the tourism can create and support as below.

Encountering the hidden treasures in the local communities

The festival is catering the local cultures which they have been passed down through generations from their ancestor based on their local communities. This rich cultural asset is a great opportunities for tourists and visitors to encounter the hidden local treasure to deeply immerse in the real life of the destination. The Tokyo event introduces not only the local Tokyo ritual festivals and traditions but also the rural festivals and folklore outside of urban areas such as the festival in OKINAWA(沖縄) and TOHOKU (東北) region where the great East Japan Earthquake hit in 2011 to support the regions.

Community engagement: Fostering the local pride and value

JTB as one of the initiating partners is also prioritizing the local community and its citizens by providing them the performance opportunities. The local citizens also benefit from this great moment to look back, recognize and reflect on their cultural background together with families, neighbors and the local population through this event. The host communities regain their pride and reconfirm the importance of local values and traditions for the local people in that area. Needless to say, the events have created opportunities for elders and seniors to share their knowledge and teach the younger generation about the cultural

legacy in order to ensure that their traditions and local culture keep being practiced and will be passed on to the next generation.

Enhancing the exchanges between local communities and tourists

There are also various opportunities for local communities to interact with tourists and visitors before and after the event. JTB has established a communication zone for farmers, fishermen, craftsmen and local people so that they can showcase their local products at the venue directly to the visitors before and after the performance. This is an ideal setting to promote some hidden treasures, like delicacies and handicrafts which are mostly hand-made or organic and contribute to the local economy. Also, after the event, the performing groups are always recruiting new members or future performers from the audience whether they are living in the communities or not, to preserve the local intangible culture as well as to keep the enjoyment and excitement of the local communities handed down from the elders.

Creating the new values and culture from the traditions

Lastly, JTB is also accelerating the process of creating innovative values through above mentioned exchanges. “KABUKI” performing arts, which is one of the traditional performing arts of Japan, was the new performance among the people in the Edo period (the 17th century) , nevertheless it is nowadays is still trying to be a cutting edge art performance in the world. Hence “Mori-no-Nigiwai (The festival of sacred woods)” is also providing a platform on which local people face the challenge to create the most innovative performance based on the local traditions and cultural legacy.

Outcome and impact

JTB's "MORI-NO-NIGIWAI (The festival of sacred woods)" event is contributing to the sustainable growth in the local communities through tourism in terms of the economic, cultural and social aspects as its basic philosophy is based on the three pillars below.

- 1) Economic sustainability through creation of tourism products and its sales promotion.
- 2) Cultural sustainability through promoting its active practice of traditional culture and entertainment.
- 3) Social sustainability through fostering exchanges between the different generations.

D. Best Practice of Tokyo Chamber of Commerce and Industry

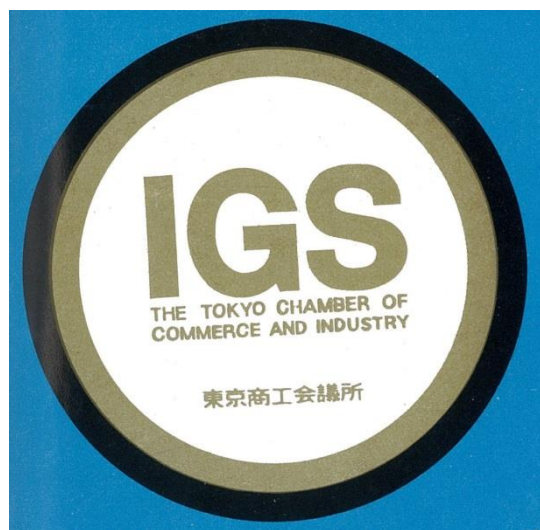
From the interview with Tokyo Chamber of Commerce and Industry (TCCI), two best practice examples were identified and discussed – International Good-Will Shop (IGS) and Premium Boccia Friday. The purpose of these two best practices is unique in their objective as the former one aims at providing quality services for inbound travelers to Tokyo, whereas the later one target employees, residents and other stakeholders.

International Good-Will Shop (IGS)

International Good-Will Shop (IGS) is an initiative designed to certify shops that meet quality and foreigner friendly service provision standards. These standards

are consists of serving English menu, hire English speaker staff, serve tourists with authentic Japanese hospitality and others. Shops that are qualified to meet these standards are entitled to acquire an IGS logo from Tokyo Chamber of Commerce and Industry (TCCI) to display in their shop. In addition, TCCI include these shops in its promotion package at global level.

Figure2.13 International Good-Will Shop



Source: Tokyo Chamber of Commerce and Industry

IGS was practically implemented during the 1964 Tokyo Olympic and it was successful in terms of enhancing the service performance. TCCI is considering introduction of the IGS system again for Tokyo 2020 somehow in revised and better form.

Premium Boccia Friday

Premium Boccia Friday is an initiative designed to promote Boccia sport as well as support the Japanese work force to engage in several entertaining activities. The term 'Premium Friday' refers to the nationwide campaign encouraging people to leave their work early on the last Friday of every month. This nationwide campaign started this year February and currently many companies

are joining to the mission.

Several stakeholders are involving in Premium Boccia Friday, among others, Japan Business Federation, Olympics & Paralympics Economic Circle Council, Tokyo Chamber of Commerce and Industry, Tokyo Metropolitan Government, Premium Friday Promotion Council are the major ones. In the Premium Boccia Friday game employees of a certain company establish a team and play with teams of other companies. However most importantly, this initiative aims to achieve the concept of barrier free for all and enhance attractiveness of Japan.

III. Summary and Challenges

Tokyo has been experiencing a rapid growth with various issues associated with urban design and planning as well as environment. A significant growth has been recorded in areas such as economy, livability, accessibility and others. The tourism industry is also one of the areas where Tokyo has a strong leverage on, as more than half of the international tourists to Japan are arriving in Tokyo. However, despite such strong economic and urban development, the city has been encountering with several challenges such as high population density and others. Some of these and other challenges of Tokyo are discussed below.

One of the main challenges facing Tokyo today and for the foreseeable future is the very high population density of the city and its metropolitan area. High population density is a challenge as Tokyo has a limited land area to accommodate its residents. This further creates overcrowding in roadways, pedestrian lanes, and other public service areas. Besides, high population density will have an extended impact on Tokyo's economy, particularly in terms

of land prices. It is known that real estate in Tokyo is one of the most expensive in the world.

The second major challenge which Tokyo has been facing is lack of multiculturalism. The fact that Tokyo has the lowest number of foreign-born residents, the City is characterized by the slowest growth to attain multiculturalism compared to other global cities. This further affects the tourism industry as the City's retailers and service providers have been struggling in serving foreign tourists both in English and other foreign languages. Hence, hiring of a staff that is conversant in more than one language is remains a challenge for majority of tourism related service providers in the City.

The third major challenge is as the number of inbound tourists to Tokyo is continues to increase, the City faces lack of accommodations. This is a big challenge as Tokyo's average room occupancy between January and December was indicated around 85% in 2016. Hence, expanding the accommodation capacity is crucial if the City to welcome more number of tourists until 2020 Tokyo Olympic and Paralympic Games. Several ways can be considered in order to cope with rising demands for accommodations in Tokyo. For instance, making Japanese traditional inns (*ryokan*) more accessible to foreign visitors and institutionalizing vacation rental businesses can be considered as some of the fundamental solutions to the challenge. In fact, the national government enacted a new law allowing Airbnb hosts to rent their homes and apartments. Local authorities (including the Tokyo Metropolitan Government) can further implement their own rules.

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