
UNWTO AM Report on Gastronomy Tourism The Case of Japan

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公益社団法人 日本観光振興協会
JAPAN TRAVEL AND TOURISM ASSOCIATION



Why does Japan conduct Gastronomy Tourism ?

Background in Japan

Resources
Geographic Characteristics

The Size of
Tourism Market

Interests in Food

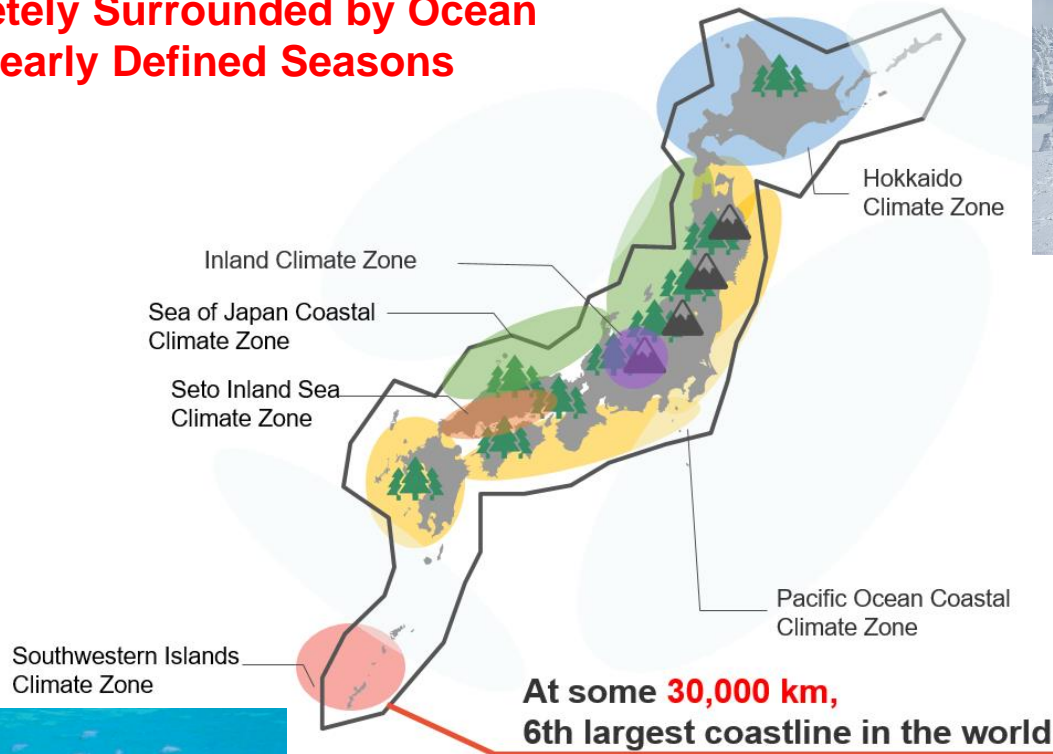
Social Environment



Resources

Geographic Characteristics

- **Majority of Japan's Landmass Covered by Mountains and Forests**
69% of lands covered by forests, the 3rd largest forested ratio in the world
- **Completely Surrounded by Ocean**
- **Four Clearly Defined Seasons**



The 7th highest ratio of endemic species of mammals in the world , followed by Mexico, Brazil and Papua New Guinea



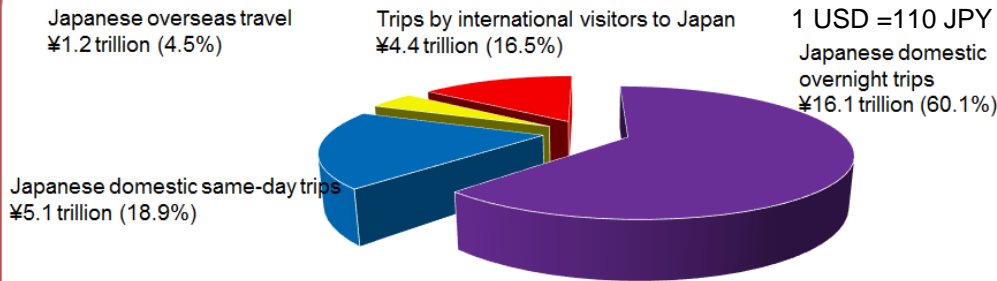


The Size of Tourism Market

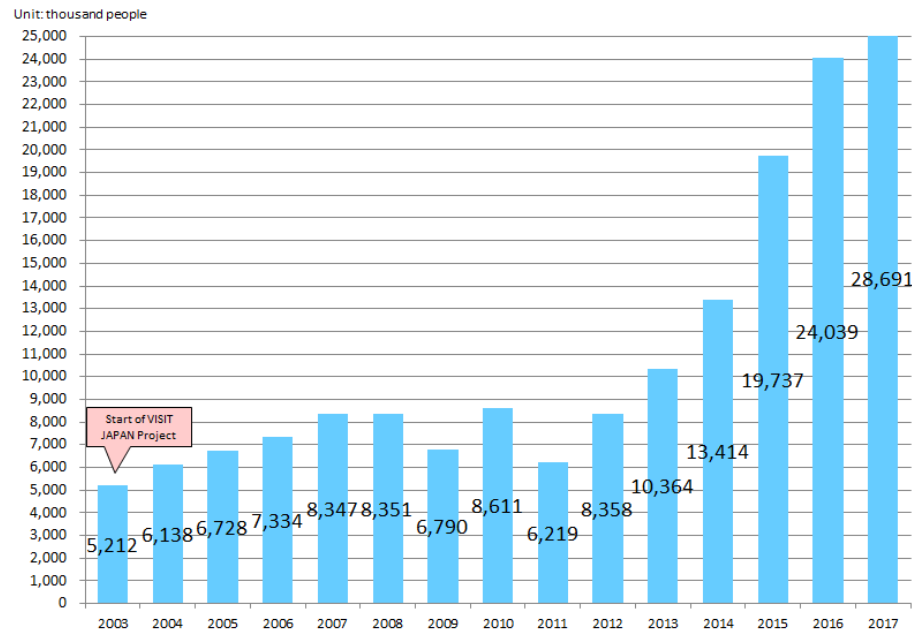
Number of domestic tourists :
Number of international visitors :

647.2 million
28.7 million

2017 Tourists spending **¥26.7 trillion** (242.7 billion USD)



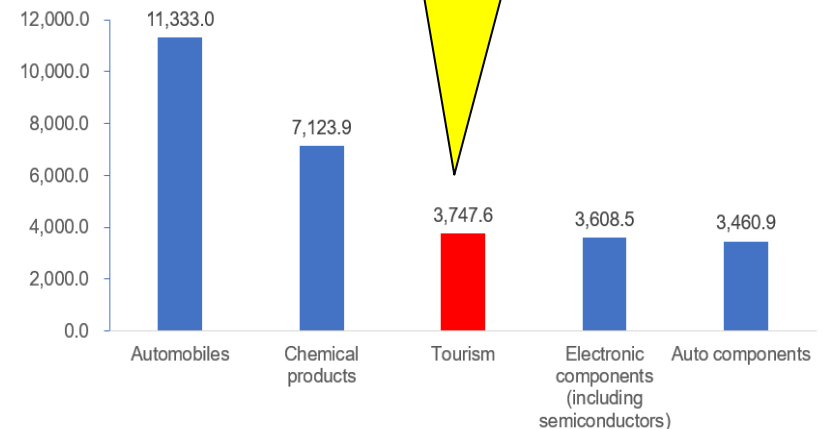
Source: Calculated from the Japan Tourism Agency's Survey of Trends in Travel and Tourism Consumption and Consumption Trend Survey for Foreigners Visiting Japan (2017 Preliminary)



Source: Japan National Tourism Organization (JNTO)

Foreign Visitors' Trip Expenditures in 2016:
¥3,747.6 billion (around 34bil USD)

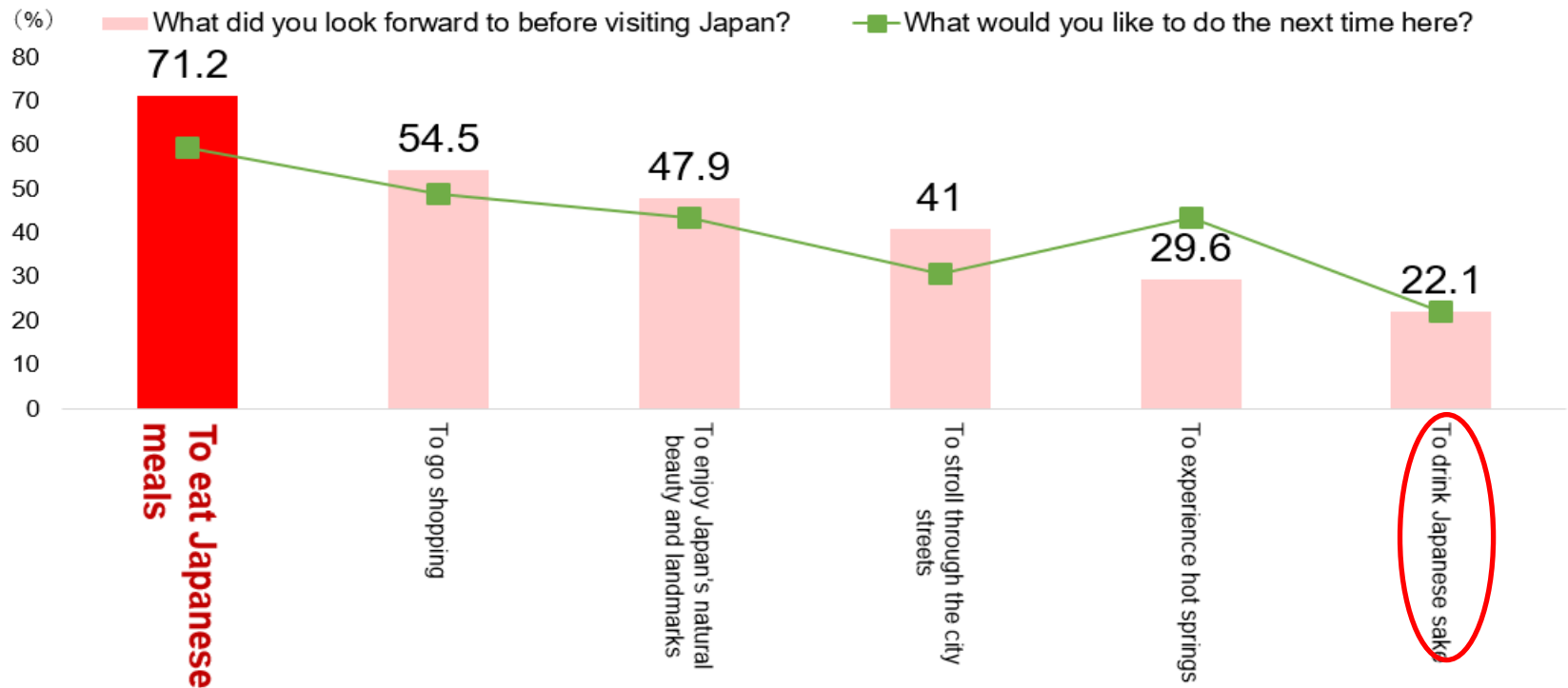
The 3rd largest amount of exports by
Product category





Interests in Food

Interests of International Visitors to Japan (Before & after visit)



Source: survey result in 2017 by JTA

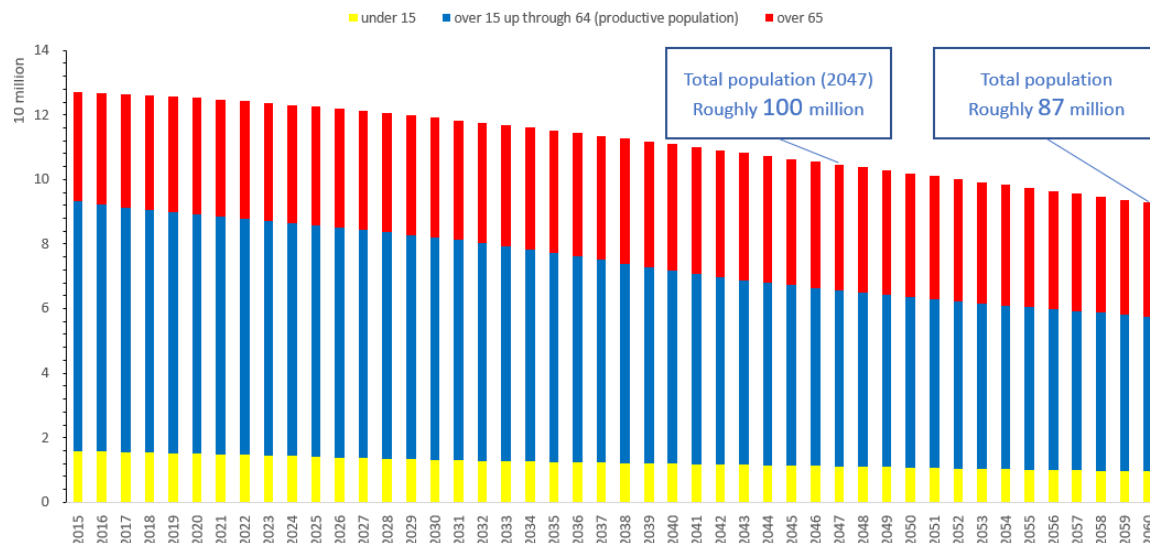
* Interests of Japanese tourists

Enjoying local cuisine in travel is ranked at the third largest interest for Japanese domestic tourists.

Social Environment



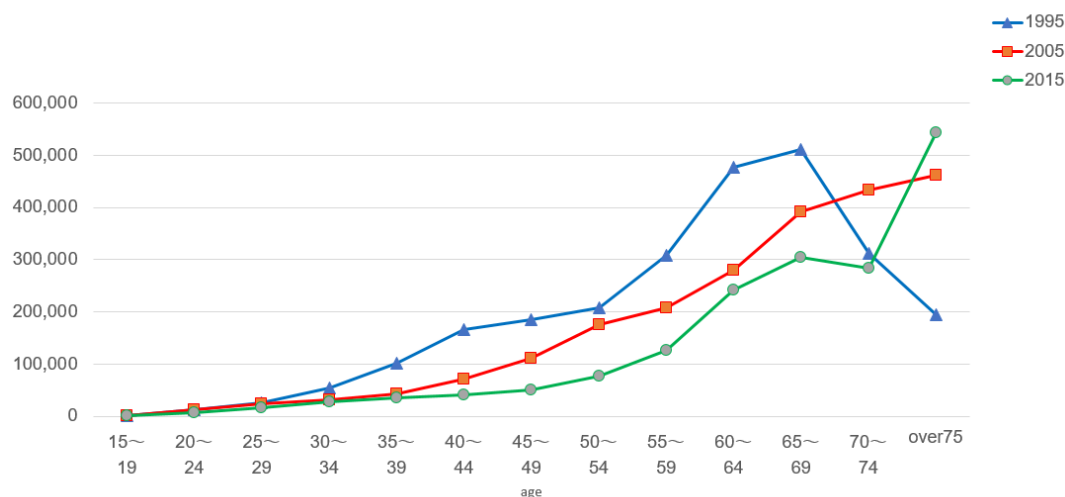
Trend/Forecast of Population Decline, Birthrate Decline and Aging



* Japanese Population
128 million 2016
to
87 million 2060

* Population of productive
ages (15 -64 years old)

Number of Core Agricultural Workers by Age Group



Estimated to fall to half of
current population in 2060

* Half of agricultural
workers are over
60years old in 2015



About the research

- ✓ Joint research by UNWTO, Gurunavi and JTTA under the Memorandum of Understanding (MOU) between UNWTO and JTTA, December 2015 which aimed to bridge regional communities in Japan and the world, followed by the MOU between three parties April 2017.
- ✓ Cross functional supports by central and prefectural government of Japan
(by all Japan)
- ✓ Guided by Advisory board (dream team of tourism leaders in Japan)
- ✓ Supported by Mitsubishi Research Institute (MRI) on research design & analysis
- ✓ Research, analysis and editing conducted by editors (Gurunavi, JTTA and MRI)

How we did research ?



Defined Gastronomy tourism in Japan

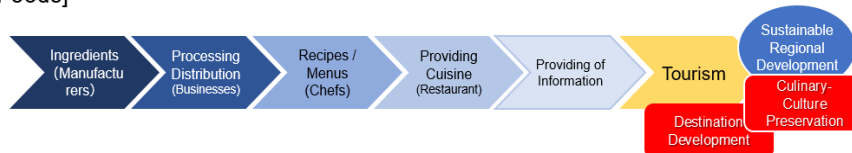
Gastronomy tourism is a form of tourism through which participants can experience the culinary culture of a given place, enjoying the regional foods created by the climate, the ingredients, the culture, customs, traditions, and history of that local area

Survey concept

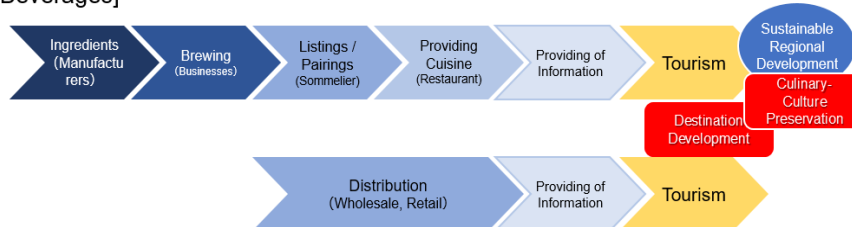
Analysis of initiatives of focusing on value chains and inter-organization collaboration

Creating criteria for evaluation and methods for organizing case studies

[Foods]



[Beverages]



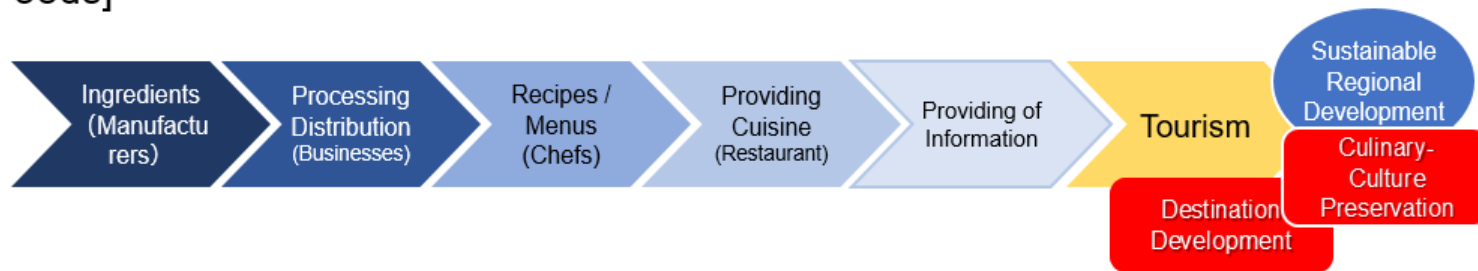
Value chain phases	<input type="checkbox"/> Ingredients, <input type="checkbox"/> Processing, <input type="checkbox"/> Recipe/menu development, <input type="checkbox"/> Provision of food or cuisine, <input type="checkbox"/> Publishing of information, <input type="checkbox"/> Tourism
Primary agents	<input type="checkbox"/> Government, <input type="checkbox"/> Private enterprises (food production/processing, restaurants, distribution, sales, transportation, travel companies, etc.), <input type="checkbox"/> Academic institutions, <input type="checkbox"/> Producers, <input type="checkbox"/> General citizens
Contents of food ingredients and cultural elements	<input type="checkbox"/> Agricultural products, <input type="checkbox"/> Fishery products, <input type="checkbox"/> Traditional cultures, <input type="checkbox"/> Fermentation and brewing (sake, miso, vinegar, etc.)
Types of activities 1)	<input type="checkbox"/> Type1. Food ingredient/menu development, <input type="checkbox"/> Type2.Food-/regional culture based, <input type="checkbox"/> Type3. Travel product development, <input type="checkbox"/> Other (a combination of types is possible)
Impact	<input type="checkbox"/> Branding, <input type="checkbox"/> Enhanced recognition, <input type="checkbox"/> Enhanced media exposure, <input type="checkbox"/> Increased sales of local products/sales at local restaurants, <input type="checkbox"/> Higher visitor traffic, <input type="checkbox"/> Other

Municipalities Survey

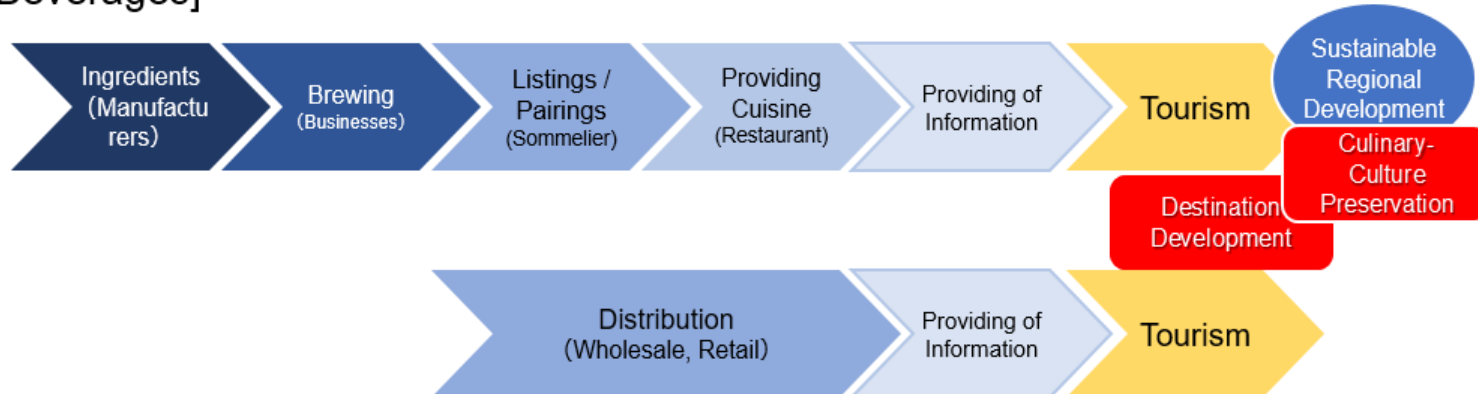
17 Case studies

The value chain for gastronomy tourism in regional Japan

[Foods]



[Beverages]



Case chart template with labels in order to objectively compare gastronomy tourism activities



Value chain phases	<input type="checkbox"/> Ingredients, <input type="checkbox"/> Processing, <input type="checkbox"/> Recipe/menu development, <input type="checkbox"/> Provision of food or cuisine, <input type="checkbox"/> Publishing of information, <input type="checkbox"/> Tourism
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1) Types of activities

Type1. Examples of food ingredient/menu development:

- Publishing information on local food ingredients in collaboration with food producers and chefs
- Providing experiences of food production and cooking on-site
- Offering dishes that use local food ingredients at local restaurants, hotels, ryokan (Japanese inns), and auberges

Type2. Examples of food-/regional culture based:

- Leveraging culinary culture and history
- Re-creating and offering local dishes
- Leveraging traditional architecture and townscapes

Type3. Examples of travel product development:

	Collection	Parameters	Collection rate (%)
Municipalities	584	1,741	33.5
Prefectures	47	47	100.0
Total	631	1,788	35.3

I. Introducing Our Case Studies	1) Awareness of "Gastronomy Tourism"	Q1: The term "Gastronomy Tourism"
		Q2: The trend of gastronomy tourism
	2) Gastronomy tourism cases in the region	Q3: Existence of cases
		Q4: Description of gastronomy tourism cases (by type)
II. Current Status of Initiatives	1) Gastronomy tourism initiative strategies and planning	Q5: Positioning as initiatives and business operations
		Q6: Collaborations with other enterprises
		Q7: Effects of collaborations
	2) Current state of the initiatives in gastronomy tourism	Q8: Description of the initiatives
		Q9: Issues
		Q10: Effects of initiative promotion
		Q13: Future goals and expectations
	3) Regional resources for gastronomy tourism promotion	Q11-12: Food ingredients representative to the region



Municipalities Survey (2)

Awareness of the term
“Gastronomy tourism”

Yes **18 %**

Existence of Gastronomy
tourism cases in the region

584 municipalities responded **100%**

Cases could be considered to be GT

403 cases in 246
municipalities

Achieved outcome
103 **18 %**

246 **42%**

Positioning as initiatives and
business operations in
municipalities and prefectures

18% of the municipalities have positions
of direct policy actions or business
operations (+3% of them on planning)

Collaborations of
municipalities with other
enterprises

Local enterprise 65%

Producers & production organizations
45%

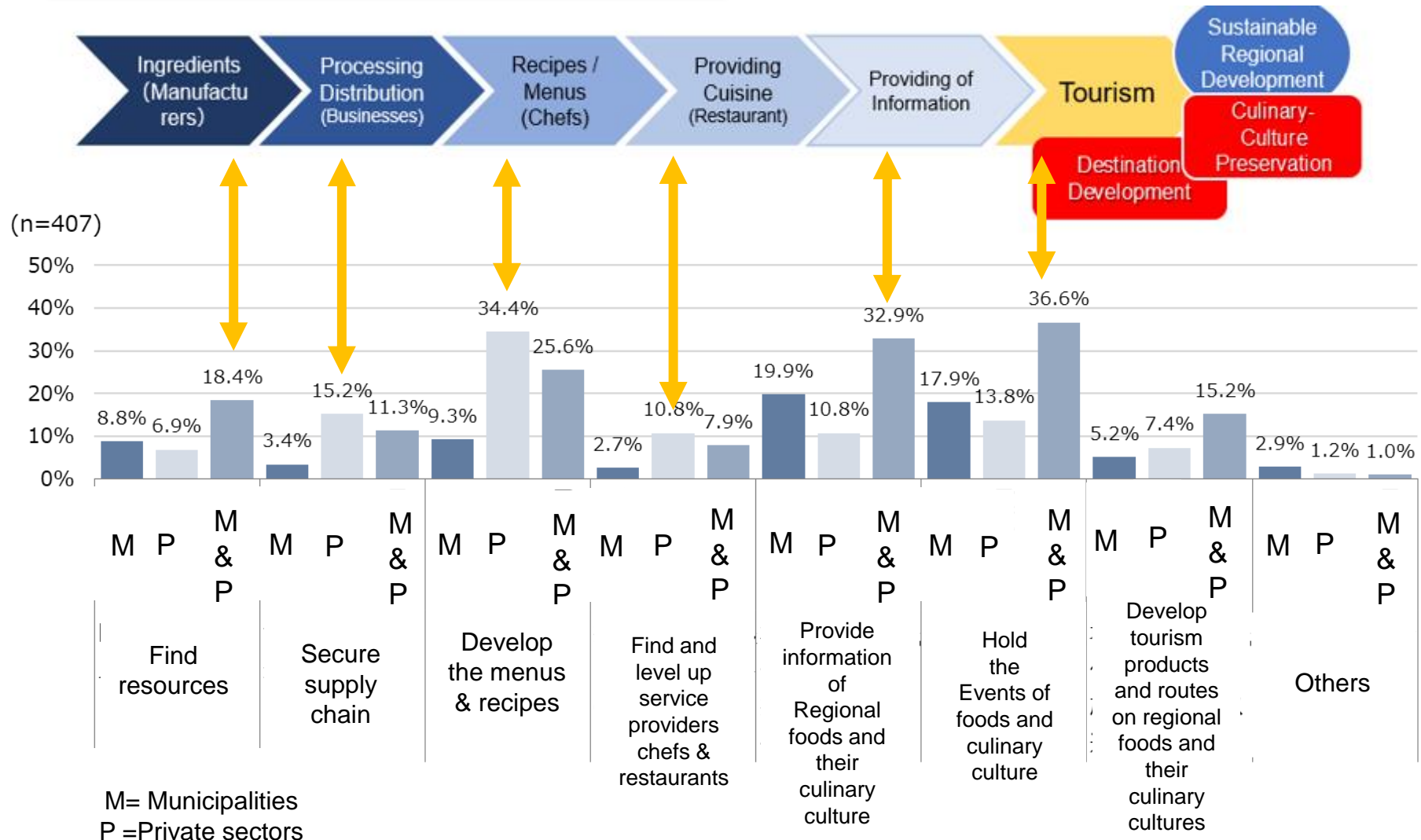
Nationwide enterprises 21%

Educational Institutions
13%



Municipalities Survey (3)

Value chain and collaborations



Municipalities Survey (4)



Effects of initiatives promotion



n=207

- ✓ The percentages of cases which succeeded in region-specific preservation and handing-down of culinary culture are 29% , and which succeeded in trickle-down effect on producers are 19% .

⇒ High ratio of collaboration between producers , producer organizations and academic institutions or (local)enterprises.
- ✓ The percentages of cases where tourism has been achieved are 17 % for commercialization of travel and 22 % for increased number of domestic visitors.

⇒ High ratio of collaboration between producers , producer organizations or (local) enterprises.

Summary of municipalities survey

- ✓ Although the term “gastronomy tourism “is not well known in Japan, activities based on the concept of gastronomy tourism are already underway across nation.
- ✓ Japan’s gastronomy tourism is the high proportion of public –private collaboration (65%) when compared to other nations (*1).
The interesting features of government-corporate partnerships in Japan is that many of them involve enterprises serving customers on a national basis.
- ✓ Only 17% of respondents of this survey noted their initiatives led to tourism (*2)
- ✓ Promoting tourism by government officials in Japan are shifting their focus beyond a simple increase in economic impact for tourism industry, and instead are turning their focus to sustainable regional development. Policies are being implemented for encouraging agricultural and regional advances , developing human resources and create jobs.
Gastronomy tourism in Japan has begun to receive attentions as means for and resulting from the convergence of these distinct policies .

*1,2 compared to the stats of UNWTO survey on gastronomy tourism (2016) 2nd Global report on Gastronomy tourism

17 Case studies



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- A) Case studies achieve high-quality tourism **6 cases**
- B) Sustainable tourism case –building a sustainable gastronomy brand **1 case**
- C) Case studies based on regional development **3 cases**
- D) Case studies with unique human resource development **3 cases**
- E) National level case studies that facilitate and support gastronomy tourism **3 cases**
- F) Case study working to spread gastronomy tourism throughout Japan **1 case**







Thank you

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Editors



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