Overview

• ‘Chapter 1: Inbound market statistics’ provides insights on key statistics about Japanese travellers, where they are going, and who they are. It also takes a look at Britain as a destination and its competitive set.

• ‘Chapter 2: Experiences and perceptions’ features details about what visitors from Japan are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by Japanese people in general are also highlighted.

• ‘Chapter 3: Understanding the market’ takes a close look at consumer trends in Japan, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach Japanese consumers are indicated, too.

• ‘Chapter 4: Access and travel trade’ shows how people from Japan travel to the UK, how to best cater for their needs and wants during their stay, and gives insights into the Japanese travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out in the appendix.

Please note that much of this report refers to the market conditions for travel from Japan to the UK prior to the COVID-19 pandemic, and gives additional insights on changes which have resulted from the crisis. An international recovery sentiment tracking survey is available.
## Contents

### Chapter 1: Market statistics
- 1.1 Key statistics ........................................... 11
- 1.2 Getting around Britain .................................. 18
- 1.3 Visitor demographics .................................. 23
- 1.4 The UK and its competitors .......................... 27

### Chapter 2: Experiences and perceptions
- 2.1 Inbound activities ...................................... 30
- 2.2 Welcome and recommending Britain .............. 38
- 2.3 Perceptions of the UK .................................. 41

### Chapter 3: Understanding the Market
- 3.1 Structural drivers ...................................... 50
- 3.2 Consumer trends ....................................... 54
- 3.3 Booking and planning .................................. 57
- 3.4 Reaching the consumer ................................ 62

### Chapter 4: Access and Travel Trade
- 4.1 Access ...................................................... 71
- 4.2 Travel trade ............................................. 74
- 4.3 Caring for the consumer ............................. 80

### Appendix:
- Working with VisitBritain ................................ 85
- Useful resources ........................................... 88
- Definitions, sources and information on this report 90
How to use this document

- VisitBritain’s Market Profiles are intended as comprehensive summaries of available data and insights for key inbound markets to the UK.

- Data is provided in as much detail as possible, across a range of topics. They are best used as reference documents, rather than being read from start to finish. For further information on a market, please consult the links in the Appendix.

- To help the reader to find data which will be helpful to them, we have used signposting and summaries throughout.

- To read key summary data points about this market, turn to the Executive Summary.

- Within each Chapter, there are summary slides to introduce data on the following slides.
  - Chapter 1 summaries: 1, 2, 3
  - Chapter 2 summaries: 1, 2
  - Chapter 3 summaries: 1, 2, 3, 4
  - Chapter 4 summaries: 1
Executive Summary
1: Inbound market statistics

Chapter summary

• In 2019, Japan retained its ranking of 16th for international tourism expenditure. US$21.3 billion was spent overseas in 2019 by Japanese international travellers.

• Japan was the UK’s 23rd largest source market in terms of visits, and 22nd for spend, in 2019. Average spend per visit from Japan was 52% higher than the global average for all inbound visits to the UK from 2017-2019.

• Just over half of visits from Japan to the UK in 2019 were made for holidays, and 28% for business. About 1-in-2 holiday visitors were visiting the UK for the first time.

• Around 1-in-3 Japanese visitors come to the UK in July-September, and seasonal spread tends to follow the global trend.

• Visits are most likely to be between 4 and 7 nights. Over half of the nights Japanese travellers spent in the UK were in a hotel or guest house from 2017-2019.

• London is the favourite destination for visitors from Japan.

• Due to the COVID-19 pandemic, visits to the UK from Japan declined by 76% in 2020. Also, in the first half of 2021, there were 98% fewer visits from Japan than there were in the same period in 2020*. Visits are forecasted to recover to 2019 levels by 2026.

Source: UNWTO, Oxford Economics, International Passenger Survey by ONS *very small sample, air departures only. Market-level inbound statistics were not produced for full-year 2020; see p. 11 for more.
2: Experiences and perceptions

Chapter summary

- Top activities featuring in visits from Japan to the UK include dining in restaurants, sightseeing famous monuments/buildings and shopping. They are more likely than other visitors to watch live art performances, such as a ballet, an opera or a musical.

- Many Japanese people decide to visit Britain because of its cultural attractions, because it is somewhere where English is spoken, somewhere new, and somewhere that is safe and secure.

- Over 1-in-3 Japanese think a trip to the UK would be “fascinating” if they visited. Museums are the cultural product they associate the most with Britain.

- Japanese people tend to look for laughter, and also landscapes and natural beauty when on holiday. The most preferred destination for Japanese travellers is Hawaii, but Australia and the USA are also well placed for delivering what they most want from a holiday.

Source: Anholt Nation Brands Index 2020 (powered by Ipsos), International Passenger Survey by ONS, VisitBritain/IPSOS 2016, Arkenford 2013
3: Understanding the market

Chapter summary

- Japan has the world’s 3rd largest economy by nominal GDP, and is ranked among the world’s most innovative countries. The COVID-19 pandemic sent Japan’s GDP into a decline of 4.7% in 2020; however, forecasts predict that full recovery may be achieved in the second half of 2021.

- Japan has one of the lowest birth rates in the world and its population is expected to decrease slightly. The Japanese population is ageing. Forecasts from the United Nations suggest that the country’s median age will be 52 by 2030. This has an impact on consumer and travel trends.

- Pre COVID-19, men and women in their 20s, and women in their 50s, were most likely to say that they hoped to increase their spending on travel in the coming year. A strong employment environment had benefited young people’s incomes, and older women who had finished raising their children looked to take advantage of time of their own.

- In the spring of 2021, 42% of Japanese respondents planned to travel internationally for a leisure trip in the next 12 months, and Britain was ranked 5th within Europe as a next destination choice. A decrease in coronavirus cases at the destination is most likely to trigger international travel for Japanese respondents.

70% of Japanese travellers will take fewer but longer holidays after the pandemic

### 4: Access and travel trade

#### Chapter summary

- Most visitors from Japan came by plane to the UK (87% in 2019), but a minority came by Eurostar, which hints at a combined trip to the UK and continental Europe.

- Seat capacity on direct, non-stopping flights from Japan to Britain shrank from 2009 to 2015, but grew once again by 27% up to 2019. In 2019, flights linked Tokyo and Osaka to London, and were split quite equally between British Airways flights and local carriers.

- Due to the COVID-19 outbreak, seat capacity between Japan and the UK was down by 59% in 2020 compared to 2019. Seat capacity in 2021 was 60% lower than 2019. However, seat capacity increased in the second half of 2021, and is scheduled to increase further in early 2022.

- For long-haul travel most Japanese travellers will still turn to agencies to plan all or part of their trip. The Japanese travel trade is highly regulated, with high levels of customer protection. Understanding Japanese culture and building personal relationships are key to success in working with the trade. There are two main periods in the year when brochures are written: October-March and April-September.

- The market is maturing though: as customers are more knowledgeable about destinations, travel companies have to adapt and are now more specialised and customer-centric.

---

Source: Apex, International Passenger Survey by ONS
Inbound market statistics

Chapter 1
1.1 Key statistics

Key insights

- From 2009-2019, inbound visits from Japan increased by 43%, with a record in 2017. Japan’s record for spend was in 2018. Japanese visitors are high spenders; from 2017-2019, their average spend per visit was £1,036, 52% higher than the all-market average.

- The most popular time for the Japanese to visit the UK is July-September (30% of visits in 2019 were made in that quarter).

- Just over half of visits from Japan to the UK were for holidays, followed by business visits (28% in 2019). Business visitors spend the most per night among all journey purposes.

- London is by far the leading destination for a trip to Britain: visitors from Japan spent 60% of their nights in the UK in 2017-2019 in London.

- About 1-in-2 Japanese holiday visitors have been to the UK before.

Source: International Passenger Survey by ONS. Please note that market-level inbound statistics have not been produced by the ONS for full-year 2020 as the IPS was suspended from mid-March; latest full-year inbound data is for 2019. More information is available here.
### 1.1 Key statistics: global context and 10 year trend

#### Global context

<table>
<thead>
<tr>
<th>Measure</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>International tourism expenditure</td>
<td>21.3</td>
</tr>
<tr>
<td>(US$bn)</td>
<td></td>
</tr>
<tr>
<td>Global rank for international tourism expenditure</td>
<td>16</td>
</tr>
<tr>
<td>Number of outbound overnight visits (m)</td>
<td>25.5</td>
</tr>
<tr>
<td>Most visited destination</td>
<td>USA</td>
</tr>
<tr>
<td>Most visited destination in Europe</td>
<td>Spain</td>
</tr>
</tbody>
</table>
1.1 Key statistics: volume and value

### Inbound volume and value

<table>
<thead>
<tr>
<th>Measure</th>
<th>2019</th>
<th>Change vs. 2018</th>
<th>Rank out of UK top markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits (000s)</td>
<td>389</td>
<td>-9%</td>
<td>23</td>
</tr>
<tr>
<td>Nights (000s)</td>
<td>2,708</td>
<td>-20%</td>
<td>30</td>
</tr>
<tr>
<td>Spend (£m)</td>
<td>369</td>
<td>-26%</td>
<td>22</td>
</tr>
</tbody>
</table>

Despite the COVID-19 outbreak in Q1 2020, visits from Japan to the UK increased by 15% in the first three months of 2020 compared to those months in 2019, up to 88,000*. In the first half of 2021, there were 3,000 Japanese visits to the UK, with those visitors spending £7m. This was a decline of 98% for visits compared to the first half of 2019, and -95% for spend**.

### Key metrics by journey purpose (2017-2019)

<table>
<thead>
<tr>
<th>Averages by journey purpose</th>
<th>Nights per visit</th>
<th>Spend per night</th>
<th>Spend per visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>6</td>
<td>£139</td>
<td>£900</td>
</tr>
<tr>
<td>Business</td>
<td>5</td>
<td>£196</td>
<td>£1,073</td>
</tr>
<tr>
<td>Visiting Friends/ Relatives</td>
<td>10</td>
<td>£69</td>
<td>£699</td>
</tr>
<tr>
<td>Study**</td>
<td>37</td>
<td>£136</td>
<td>£5,064</td>
</tr>
<tr>
<td>Misc.**</td>
<td>4</td>
<td>£96</td>
<td>£362</td>
</tr>
<tr>
<td>All visits</td>
<td>8</td>
<td>£138</td>
<td>£1,036</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, *provisional data for January-March 2020 *small base **small base, air departures only for 2021
1.1 Key statistics: journey purpose

• Most visits from Japan to the UK are made for leisure: just over half were made for holidays and 15% to visit friends or relatives. However, business is the second-most common reason for which the Japanese visit the UK, comprising 28% of all Japanese visits in 2019.

• Japanese visitors were half as likely to be visiting friends and relatives in the UK than the all-market average in 2019. Other visits were made for study (2%), or miscellaneous purposes (3%).

• In 2019, overall visits from Japan fell by 9% when compared to 2018, the number of holiday visits remained stable, VFR visits grew by 5% and business visits declined by 19%.

• Japanese business visitors spend the most per night out of all journey purposes, at £196. VFR visitors stay longer in the UK than both holiday and business visitors, but spend less per night and per visit.

Source: International Passenger Survey by ONS
1.1 Key statistics: seasonality

**Seasonality 2019**

<table>
<thead>
<tr>
<th>Month</th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan-Mar</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Apr-Jun</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>Jul-Sep</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Oct-Dec</td>
<td>26%</td>
<td>25%</td>
</tr>
</tbody>
</table>

**Seasonality trend (visits 000s)**

- The most popular time for Japanese visitors to come the UK is in the summer months: in 2019, just under a third of visits from Japan to the UK were made between July and September, slightly above the global average.
- The autumn months are also quite popular with 26% of visits made between October and December.
- Rates of Japanese visits in winter and spring are similar to the all-market average.
- Rates of visits in October-December have increased in the last two years; rising to beat January-March as the second most prominent quarter for Japanese visits.

Source: International Passenger Survey by ONS
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, in 2019 (nights, %share)

- Hotel/guest house: 58%
- Free guest with relatives or friends: 22%
- Hostel/university/school: 6%
- Own home: 8%
- Rented house/flat: 2%
- Paying guest family or friends house: 2%
- Other: 1%
- Bed & Breakfast: 1%
- Other: 1%

Duration of stay trend (visits 000s)

- Nil nights
- 1-3 nights
- 4-7 nights
- 8-14 nights
- 15+ nights

Source: International Passenger Survey by ONS

- Japanese visitors are most likely to stay in the UK between 4 and 7 nights, and this duration has been most prominent in all years in the last decade apart from 2011. 1-3 nights is the next most prominent visit duration. The volume of visitors staying for 8-14 nights has declined since 2017.
- In 2019, Japanese visitors spent over half of their nights in the UK at hotels or guest houses, with almost 1-in-5 spent as a free guest with relatives or friends. During that period, Japanese visitors were also more likely to spend nights in a hostel/university/school than the all-market average (8% and 3% respectively).
1.1 Key statistics: repeat visits and package tours

Proportion of overnight holiday visitors to the UK who have been to the UK before*

- Japan: 50%
- China: 29%
- Hong Kong: 53%
- South Korea: 22%
- All markets: 63%

Proportion of visits that are bought as part of a package or all-inclusive tour in 2019**

- Japan: Business 2%, Holiday 7%, VFR 7%, Study 5%, Misc. 9%
- All markets: Business 2%, Holiday 12%, VFR 15%, Study 18%, Misc. 9%

- Only 50% of holiday visits from Japanese residents to the UK (excluding UK nationals) were made by repeat visitors, which is below the all-market average. However, compared across the source region, this repeat visit rate is quite high.
- Overall, the proportion of visits from Japan to the UK bought as part of a package, or all-inclusive tour is on par with the all-market average in 2019; however, they over-index on package tours for VFR and Misc. visitors.

International Passenger Survey by ONS. *2015, excluding British nationals; **See definition of a package holiday in appendix
## 1.2 Getting around Britain

### Annual visits to the UK (average from 2017-2019)

<table>
<thead>
<tr>
<th>Region</th>
<th>Nights stayed (000)</th>
<th>Visits (000)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>3,137</td>
<td>417</td>
<td>432</td>
</tr>
<tr>
<td>Scotland (SC)</td>
<td>220</td>
<td>31</td>
<td>21</td>
</tr>
<tr>
<td>Wales (WA)</td>
<td>35</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>Northern Ireland (NI)</td>
<td>6</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>London (LDN)</td>
<td>1,898</td>
<td>319</td>
<td>324</td>
</tr>
<tr>
<td>North East (NE)</td>
<td>25</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>North West (NW)</td>
<td>89</td>
<td>24</td>
<td>13</td>
</tr>
<tr>
<td>Yorkshire (YO)</td>
<td>61</td>
<td>7</td>
<td>1</td>
</tr>
<tr>
<td>West Midlands (WM)</td>
<td>80</td>
<td>13</td>
<td>10</td>
</tr>
<tr>
<td>East Midlands (EM)</td>
<td>68</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>East of England (EoE)</td>
<td>182</td>
<td>20</td>
<td>16</td>
</tr>
<tr>
<td>South West (SW)</td>
<td>184</td>
<td>25</td>
<td>14</td>
</tr>
<tr>
<td>South East (SE)</td>
<td>286</td>
<td>41</td>
<td>25</td>
</tr>
<tr>
<td>Nil nights (Nil)</td>
<td>N/A</td>
<td>3</td>
<td>0.4</td>
</tr>
</tbody>
</table>

### Nights (% share, 2017-2019)

- Scotland (SC): 7%
- Wales (WA): 1%
- Northern Ireland (NI): 0.2%
- London (LDN): 60%
- North East (NE): 0.8%
- North West (NW): 3%
- Yorkshire (YO): 2%
- West Midlands (WM): 3%
- East Midlands (EM): 2%
- East of England (EoE): 6%
- South West (SW): 6%
- South East (SE): 9%

Source: International Passenger Survey by ONS
1.2 Getting around Britain: regional spread and top towns/cities

Top towns and cities visited (average from 2017-2019)

<table>
<thead>
<tr>
<th>Town</th>
<th>Visits (000s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>319</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>18</td>
</tr>
<tr>
<td>Manchester</td>
<td>13</td>
</tr>
<tr>
<td>Glasgow</td>
<td>11</td>
</tr>
<tr>
<td>Cambridge</td>
<td>10</td>
</tr>
</tbody>
</table>

- London is the leading destination for a trip to Britain by far. 59% of the nights spent in the UK by visitors from Japan were in London, compared to 41% of all inbound visitors’ nights in 2019.
- Fewer nights spent in the UK by Japanese visitors were spent in the rest of England, 31% in 2019. However, Japanese visits and spend to the rest of England did increase in 2019 compared to 2018.
- After London, the most popular UK region for Japanese travellers to spend time is the South East (2017-2019).
- Japanese visitors were slightly less likely to stay in the other nations than across all markets on average.
- Japanese visitors are overall less likely than the average to go to the British countryside or villages, or to the coast or beaches.

Regional spread 2019

Source: International Passenger Survey by ONS
1.2 Getting around Britain: visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

- VFR: Went to the coast or beaches: Japan - 9%, All markets - 13%
- VFR: Went to countryside or villages: Japan - 19%, All markets - 18%
- Business: Went to the coast or beaches: Japan - 0%, All markets - 2%
- Business: Went to countryside or villages: Japan - 3%, All markets - 2%
- Holiday: Went to the coast or beaches: Japan - 3%, All markets - 14%
- Holiday: Went to countryside or villages: Japan - 11%, All markets - 18%
- All journey purposes: Went to the coast or beaches: Japan - 3%, All markets - 10%
- All journey purposes: Went to countryside or villages: Japan - 10%, All markets - 14%

Source: International Passenger Survey by ONS 2016
1.2 Getting around Britain: use of internal modes of transport

Propensity to use internal modes of transport

- **Bus, tube, tram or metro train**: 49% (All markets), 62% (Japan)
- **Taxi**: 28% (All markets), 39% (Japan)
- **Train (outside town/city)**: 18% (All markets), 23% (Japan)
- **Uber or other sharing app**: 10% (All markets), 5% (Japan)
- **Hired self-drive car/vehicle**: 5% (All markets), 4% (Japan)
- **Public bus/coach (outside town/city)**: 5% (All markets), 4% (Japan)
- **Private coach/minibus**: 2% (All markets), 2% (Japan)
- **Ferry/boat**: 1% (All markets), 0% (Japan)
- **Domestic flight**: 1% (All markets), 1% (Japan)
- **Other car/vehicle brought to the UK***: 1% (All markets), 0% (Japan)
- **None of these**: 13% (All markets), 27% (Japan)

Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for “car/vehicle you/group brought to the UK”
1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)

- When in a town or city, visitors from Japan are most likely to use a bus, tube, tram or metro train, at higher rates than other markets.
- When outside a town or city, they are most likely to use a train; however, they arelightly less likely to do this than the all market average.
- They are significantly more likely to use a taxi than other markets – 39% vs. 27% all market average.
- Japanese visitors tend to prefer to buy tickets for transport during their visit. This is especially the case for London transport but holds true for train travel, airport transfer and coach travel. However, they prefer to hire cars and book domestic flights before arriving in the UK.

Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors
1.3 Visitor demographics

Visitor characteristics

- More visits from Japan to the UK are made by men than women (58% vs. 42% respectively in 2019).
- This pattern holds true for holiday, business and misc. visits; however, study and VFR visits are more likely to be made by women.
- 42% of Japanese visitors in 2019 were between 25 and 44 years old. Over the last decade years, the number of Japanese visitors over 45 years old has increased noticeably.
- This is in line with the rapidly ageing Japanese population: about 29% of the Japanese population were 65 years old or older as estimated in 2021, compared to 23% in 2011.

Source: International Passenger Survey by ONS, Oxford Economics
1.3 Visitor demographics: gender and age groups

Gender ratio of visits (2019):

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>All markets</td>
<td>59%</td>
<td>41%</td>
</tr>
<tr>
<td>Japan</td>
<td>58%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Gender ratio of visits from Japan by journey purpose (2019):

<table>
<thead>
<tr>
<th>Journey Purpose</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Misc.</td>
<td>61%</td>
<td>39%</td>
</tr>
<tr>
<td>Study</td>
<td>41%</td>
<td>59%</td>
</tr>
<tr>
<td>VFR</td>
<td>40%</td>
<td>60%</td>
</tr>
<tr>
<td>Holiday</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Business</td>
<td>85%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Age group trend (visits in 000s)

Source: International Passenger Survey by ONS
1.3 Visitor demographics: travel companions

Who have Japanese visitors to the UK travelled with?

Japanese visitors are most likely to be travelling on their own, and over-index on solo travel compared to other markets. They are also more likely to travel with business colleagues, or as part of a tour group. In contrast, they under-index when it comes to travelling with a spouse/partner, children, family members, and friends.

Source: International Passenger Survey by ONS, 2017. “Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?”
1.3 Visitor demographics: Origin

Visits to the UK (2018)

- Most visits from Japan to the UK are made by visitors from the central part of the country.
- 66% of visitors from Japan come from the Greater Tokyo Metropolitan Area, and 57% come from Tokyo itself. The next most prominent area is Kinki at 17%, and Tokai at 9%.
- A third of the Japanese population live in or around Tokyo, on the Kanto central plain. 92% of the population lives in urban areas, with the regions of high density being along the coasts.

Source: International Passenger Survey by ONS 2018, CIA World Factbook
The UK and its competitors (1)

Market size, share and growth potential

- The UK was the 4th most visited destination in Europe by Japanese travellers for overnight trips in 2019, behind Spain, Germany, and France.
- Before 2020, the Japanese outbound market was growing; global overnight visits from this market grew by 27% from 2009 to 2019.
- However, due to the COVID-19 pandemic, global overnight visits from Japan shrank by 86%, and visits to the UK declined by 76%. Visits to the UK are forecasted to recover to 2019 levels by 2026.
- Among our competitor set of destinations, Spain saw the largest increase in market share between 2009 and 2019, with a growth of 5 percentage points. However, looking further ahead, Australia is forecast to see the most growth up to 2029, at +1 percentage point, while the UK is forecasted to retain its market share.

Source: Oxford Economics
1.4 The UK and its competitors (2)

The UK’s market share of Japanese visits among competitor set

<table>
<thead>
<tr>
<th>Country</th>
<th>2009</th>
<th>2019</th>
<th>2029</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>52%</td>
<td>53%</td>
<td>50%</td>
</tr>
<tr>
<td>France</td>
<td>12%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>10%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Australia</td>
<td>6%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Italy</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>5%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Spain</td>
<td>4%</td>
<td>10%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Historic and potential visits to the UK (000s)

Experiences and perceptions

Chapter 2
2.1 Inbound activities: summary

- For Japanese visitors, dining in restaurants is the most popular activity when they visit the UK, with 75% of Japanese visitors doing this during their stay, compared to the all-market average of 63%.
- Also popular are sightseeing famous monuments/buildings, going shopping, visiting museums or art galleries, and visiting castles or historic houses.
- Overall, they are more likely than the all-market average to watch live art performances, such as a ballet, an opera or a musical. However, they are less likely than the average to participate in nature-related activities, visiting parks or gardens, a National Park, or walking in the countryside or along the coast.
- They have a higher propensity than average to buy British food and drinks products, or books and stationery during their visit.

Top 10 activities for Japanese visitors during their visit to the UK

1. Dining in restaurants
2. Sightseeing famous monuments/buildings
3. Shopping
4. Visiting museums or art galleries
5. Visiting castles or historic houses
6. Going to the pub
7. Visiting parks or gardens
8. Having a traditional afternoon tea
9. Socialising with the locals
10. Walking in the countryside

For more information on activities, please visit our webpage of activities undertaken in Britain

Source: International Passenger Survey by ONS, rankings based on 2007-2019 data
2.1 Inbound activities: tourism and heritage

Propensity to visit museums and galleries

VFR: went sightseeing
- Japan: 24%
- All markets: 62%
- VFR: went on a guided tour
- Japan: 15%
- All markets: 39%
- VFR: visited museums and art galleries
- Japan: 24%
- All markets: 47%
- Holiday: went sightseeing
- Japan: 24%
- All markets: 49%
- Holiday: went on a guided tour
- Japan: 28%
- All markets: 49%
- Holiday: visited museums and art galleries
- Japan: 28%
- All markets: 49%
- Business: went sightseeing
- Japan: 15%
- All markets: 47%
- Business: went on a guided tour
- Japan: 6%
- All markets: 29%
- Business: visited museums and art galleries
- Japan: 10%
- All markets: 28%
- All journey purposes: went sightseeing
- Japan: 16%
- All markets: 30%
- All journey purposes: went on a guided tour
- Japan: 18%
- All markets: 39%
- All journey purposes: visited museums/galleries
- Japan: 25%
- All markets: 39%

Source: International Passenger Survey by ONS, 2016

Propensity to visit built heritage sites

VFR: visited religious buildings
- Japan: 9%
- All markets: 18%
- VFR: visited castles/historic houses
- Japan: 24%
- All markets: 36%
- Holiday: visited religious buildings
- Japan: 4%
- All markets: 12%
- Holiday: visited castles/historic houses
- Japan: 4%
- All markets: 12%
- Business: visited religious buildings
- Japan: 6%
- All markets: 20%
- Business: visited castles/historic houses
- Japan: 4%
- All markets: 21%
- All journey purposes: visited religious buildings
- Japan: 10%
- All markets: 20%
- All journey purposes: visited castles/historic houses
- Japan: 9%
- All markets: 28%
2.1 Inbound activities: culture

Propensity to attend the performing arts

- All journey purposes: went to the theatre/musical/opera/ballet
  - All markets: 9%
  - Japan: 11%
- All journey purposes: attended a festival
  - All markets: 1%
  - Japan: 3%
- All journey purposes: went to a live music event
  - Business: went to the theatre/musical/opera/ballet
    - All markets: 2%
    - Japan: 4%
  - Business: attended a festival
    - All markets: 1%
    - Japan: 2%
  - Holiday: went to a live music event
    - All markets: 0%
    - Japan: 2%
  - Holiday: went to the theatre/musical/opera/ballet
    - All markets: 0%
    - Japan: 2%
  - Holiday: attended a festival
    - All markets: 1%
    - Japan: 4%

Propensity to attend the performing arts

- All journey purposes: went to the theatre/musical/opera/ballet
  - Japan: 15%
- All journey purposes: attended a festival
  - Japan: 4%
- All journey purposes: went to a live music event
  - Business: went to the theatre/musical/opera/ballet
    - Japan: 11%
  - Business: attended a festival
    - Japan: 5%
  - Holiday: went to the theatre/musical/opera/ballet
    - Japan: 5%
  - Holiday: attended a festival
    - Japan: 1%
  - Holiday: went to a live music event
    - Japan: 10%
  - VFR: went to the theatre/musical/opera/ballet
    - Japan: 8%
  - VFR: attended a festival
    - Japan: 3%
  - VFR: went to a live music event
    - Japan: 7%

Propensity to participate into other culture-related activities

- All journey purposes: visited literary, music, TV, or film locations
  - All markets: 4%
  - Japan: 5%
- Business: visited literary, music, TV or film locations
  - All markets: 2%
  - Japan: 1%
- Holiday: visited literary, music, TV, or film locations
  - All markets: 9%
  - Japan: 5%
- VFR: visited literary, music, TV or film locations
  - All markets: 5%
  - Japan: 4%
- Study: visited literary, music, TV or film locations
  - All markets: 6%
  - Japan: 3%
- Misc: visited literary, music, TV or film locations
  - All markets: 1%
  - Japan: 0%

Source: International Passenger Survey by ONS, 2016 (performing arts) and 2013 (watch sport live)
2.1 Inbound activities: sports

Propensity to partake in sports-related activities

- VFR: played golf
  - Japan: 2%
  - All markets: 4%
- VFR: played football
  - Japan: 1%
  - All markets: 1%
- VFR: took part in sports activities
  - Japan: 3%
  - All markets: 3%
- Holiday: played golf
  - Japan: 0%
  - All markets: 1%
- Holiday: played football
  - Japan: 0%
  - All markets: 0%
- Holiday: took part in sports activities
  - Japan: 1%
  - All markets: 3%
- All journey purposes: played golf
  - Japan: 1%
  - All markets: 1%
- All journey purposes: played football
  - Japan: 0%
  - All markets: 0%
- All journey purposes: took part in sports activities
  - Japan: 1%
  - All markets: 2%

Number who watched sports live during trip (000s)

- Football: 8.1
- Golf: 1.1
- Rugby: 2.6
- Tennis: 3.8
- Motor Sports: 1.3

Source: International Passenger Survey by ONS, 2016 (performing arts) and 2019 (watch sport live)
2.1 Inbound activities: outdoors

Propensity to go for a walk or cycle

- **VFR: Cycling/mountain-biking**
  - Japan: 13%
  - All markets: 32%

- **VFR: Walking along the coast**
  - Japan: 0%
  - All markets: 13%

- **VFR: Walking in the countryside**
  - Japan: 6%
  - All markets: 25%

- **Holiday: Cycling/mountain-biking**
  - Japan: 0%
  - All markets: 15%

- **Holiday: Walking along the coast**
  - Japan: 0%
  - All markets: 17%

- **Holiday: Walking in the countryside**
  - Japan: 17%
  - All markets: 30%

- **Business: Cycling/mountain-biking**
  - Japan: 0%
  - All markets: 6%

- **Business: Walking along the coast**
  - Japan: 0%
  - All markets: 21%

- **Business: Walking in the countryside**
  - Japan: 4%
  - All markets: 28%

- **All journey purposes: Cycling/mountain-biking**
  - Japan: 0%
  - All markets: 6%

- **All journey purposes: Walking along the coast**
  - Japan: 0%
  - All markets: 22%

- **All journey purposes: Walking in the countryside**
  - Japan: 17%
  - All markets: 31%

- **All journey purposes: Going for a walk, hike or ramble**
  - Japan: 0%
  - All markets: 21%

- **All journey purposes: Visiting parks or gardens**
  - Japan: 0%
  - All markets: 6%

- **All journey purposes: Visiting a National Park**
  - Japan: 0%
  - All markets: 1%

- **All journey purposes: Visiting parks or gardens and a national park**
  - Japan: 0%
  - All markets: 4%

- **All journey purposes: Going for a walk, hike or ramble**
  - Japan: 6%
  - All markets: 14%

- **All journey purposes: Visiting a National Park**
  - Japan: 6%
  - All markets: 7%

- **All journey purposes: Visiting parks or gardens**
  - Japan: 6%
  - All markets: 17%

Source: International Passenger Survey by ONS, 2016 (visiting parks and gardens and a national park), 2010 (walking along the coast) and 2007 (walking in the countryside)
2.1 Inbound activities: going out

Propensity to go to restaurants, or to have a traditional afternoon tea

- VFR: traditional afternoon tea
  - Japan: 20%
  - All markets: 15%
  - Total: 79%
- VFR: dining in restaurants
  - Japan: 65%
  - All markets: 65%
  - Total: 79%
- Holiday: traditional afternoon tea
  - Japan: 30%
  - All markets: 18%
  - Total: 75%
- Holiday: dining in restaurants
  - Japan: 75%
  - All markets: 71%
  - Total: 75%
- Business: traditional afternoon tea
  - Japan: 5%
  - All markets: 4%
  - Total: 49%
- Business: dining in restaurants
  - Japan: 70%
  - All markets: 63%
  - Total: 75%
- All journey purposes: traditional afternoon tea
  - Japan: 21%
  - All markets: 14%
  - Total: 75%
- All journey purposes: dining in restaurants
  - Japan: 63%
  - All markets: 63%
  - Total: 75%

Propensity to go to the pub or bars and night clubs, or to socialise with locals

- VFR: socialising with the locals
  - Japan: 5%
  - All markets: 15%
  - Total: 45%
- VFR: went to bars or night clubs
  - Japan: 4%
  - All markets: 14%
  - Total: 44%
- VFR: went to pub
  - Japan: 15%
  - All markets: 48%
- Holiday: socialising with the locals
  - Japan: 15%
  - All markets: 32%
  - Total: 46%
- Holiday: went to bars or night clubs
  - Japan: 14%
  - All markets: 31%
  - Total: 48%
- Holiday: went to pub
  - Japan: 14%
  - All markets: 44%
  - Total: 48%
- Business: socialising with the locals
  - Japan: 7%
  - All markets: 12%
  - Total: 15%
- Business: went to bars or night clubs
  - Japan: 17%
  - All markets: 24%
  - Total: 41%
- Business: went to pub
  - Japan: 12%
  - All markets: 29%
  - Total: 41%
- All journey purposes: socialising with the locals
  - Japan: 4%
  - All markets: 12%
  - Total: 29%
- All journey purposes: went to bars or night clubs
  - Japan: 12%
  - All markets: 31%
  - Total: 41%
- All journey purposes: went to pub
  - Japan: 29%
  - All markets: 41%
  - Total: 41%

Source: International Passenger Survey by ONS, 2008 (dining in restaurants) and 2017 (all other activities)
2.1 Inbound activities: shopping

Propensity to go to shopping

- VFR: went shopping
  - Japan: 54%
  - All markets: 61%
- Holiday: went shopping
  - Japan: 24%
  - All markets: 23%
- Business: went shopping
  - Japan: 69%
  - All markets: 61%
- All journey purposes: went shopping
  - Japan: 54%
  - All markets: 55%

Propensity to purchase selected items

- None of these
  - Japan: 34%
  - All markets: 38%
- Other holiday souvenir
  - Japan: 23%
  - All markets: 16%
- Items for your home e.g. furnishing
  - Japan: 4%
  - All markets: 3%
- Electrical or electronic items e.g. camera
  - Japan: 2%
  - All markets: 3%
- CDs, DVDs, computer games etc
  - Japan: 6%
  - All markets: 5%
- Food or drink
  - Japan: 24%
  - All markets: 32%
- Games, toys or gifts for children
  - Japan: 6%
  - All markets: 9%
- Books or stationery
  - Japan: 18%
  - All markets: 13%
- Cosmetics or toiletries e.g. perfume
  - Japan: 11%
  - All markets: 12%
- Bags, purses etc
  - Japan: 9%
  - All markets: 14%
- Personal accessories e.g. jewellery
  - Japan: 8%
  - All markets: 10%
- Clothes or shoes
  - Japan: 36%
  - All markets: 41%

Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items) – please note that the data about purchased items is to be updated shortly given the revision of the 2009-2018 IPS data in May 2020
2.1 Inbound activities: learning

Propensity to participate in an English language course during a visit to the UK

<table>
<thead>
<tr>
<th>Country</th>
<th>All markets</th>
<th>China</th>
<th>Hong Kong</th>
<th>Japan</th>
<th>South Korea</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of all visits</td>
<td>2%</td>
<td>3%</td>
<td>5%</td>
<td>2%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Propensity to learn a new skill or craft

- **VFR: learned a new skill**
  - Japan: 0%
  - All markets: 2%

- **Holiday: learned a new skill**
  - Japan: 3%
  - All markets: 3%

- **Business: learned a new skill**
  - Japan: 1%
  - All markets: 1%

- **All journey purposes: learned a new skill**
  - Japan: 2%
  - All markets: 2%

Source: International Passenger Survey by ONS, Did you go on any English language courses during this visit? Displayed as % of all visits in this market, visits incl. participation in an English language course might be based on a small sample.
2.2 Welcome and recommending Britain

**Feeling of ‘welcome’ in Britain**

- **Very Welcome**: 80% 82%
- **Welcome**: 16% 16%
- **Neither**: 3% 2%
- **Unwelcome**: 0% 0%
- **Very Unwelcome**: 0% 0%

**Likelihood to recommend Britain**

- **Extremely likely**: 77% 82%
- **Likely**: 19% 15%
- **Neutral**: 4% 2%
- **Unlikely**: 0% 0%
- **Not likely at all**: 0% 0%

*Source: International Passenger Survey by ONS, 2017*
2.2 Reasons to return to a holiday destination

Reasons to return to a destination in general

- The local food/drink: 69%
- The country caters well to tourists: 55%
- The country is easy to get to for me: 53%
- The country is easy to get around: 46%
- Go back to see the sights/attractions I didn't see the previous time: 40%
- Visit a different part of the country: 39%
- Experience a new activity I did not do last time: 40%
- Positive interactions with locals the last time I visited: 34%
- Go back to the same part of the country: 30%
- Stay in the same accommodation: 24%
- See friends/relatives in the country: 25%
- Go back to the same sights/attractions again: 24%
- Learning new skills or crafts: 18%
- Accessible facilities for people with special needs (e.g. disabled or elderly): 18%
- Other: 2%

Source: Anholt Nation Brands Index, powered by Ipsos 2019
## 2.2 Reasons to return to the UK

<table>
<thead>
<tr>
<th>Reason</th>
<th>All markets</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit a different part of the country</td>
<td>45%</td>
<td>42%</td>
</tr>
<tr>
<td>Go back to see the sights/attractions I didn't see the previous time</td>
<td>40%</td>
<td>38%</td>
</tr>
<tr>
<td>The local food/drink</td>
<td>24%</td>
<td>16%</td>
</tr>
<tr>
<td>The country is easy to get to for me</td>
<td>31%</td>
<td>30%</td>
</tr>
<tr>
<td>Experience a new activity I did not do last time</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>The country is easy to get around</td>
<td>32%</td>
<td>34%</td>
</tr>
<tr>
<td>The country caters well to tourists</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Go back to the same sights/attractions again</td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td>Learning new skills or crafts</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Go back to the same part of the country</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Positive interactions with locals the last time I visited</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Stay in the same accommodation</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Accessible facilities for people with special needs (e.g. disabled or elderly people,…)</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>See friends/relatives in the country</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>I don't intend to go back to the United Kingdom for a holiday again</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Anholt Nation Brands Index, powered by Ipsos 2019
2.3 Perceptions of the UK (1)

• In 2021, the Japanese ranked the UK 4th overall out of 60 nations for its ‘country brand’, a decline of 1 rank compared to perceptions in 2020. They also ranked the UK 3rd for Culture (an increase of 2 ranks), 7th for Tourism (a decline of 2), and 9th for People (also a decline of 2).

• When asked the most important reasons for choosing Britain as a holiday destination, cultural attractions are the main reason why the Japanese chose the UK by far (over half chose this as a key motivation). The fact that English is spoken, as well as the possibility to discover a new destination when visiting the UK, also appealed to many holidaymakers.

• Japanese travellers tend to look for a holiday destination that will provide fun and laughter, where they can enjoy the beauty of the landscape, chill and slow down to a different pace of life. However, they would usually consider the USA as the best to deliver on their top holiday ‘wants’, and Australia as the best to deliver on the latter two. Britain rates highly for visiting a place with a lot of history and historic sites, seeing world-famous sites and places, broadening their mind, stimulating their thinking, and feeling special or spoilt. However, France is often better perceived for those attributes than the UK.

Source: VisitBritain/IPSOS 2016, Anholt Nation Brands Index 2021 powered by Ipsos, Arkenford 2013
## 2.3 Perceptions of the UK (2)

### UK’s ranking (out of 60 nations)

<table>
<thead>
<tr>
<th>Measure</th>
<th>Japanese respondents</th>
<th>All respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Nation Brand</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Culture (overall)</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>The country has a rich cultural heritage</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>The country is an interesting and exciting place for contemporary culture such as music, films, art and literature</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>The country excels at sports</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>People (overall)</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>If I visited the country, the people would make me feel welcome</td>
<td>19</td>
<td>18</td>
</tr>
<tr>
<td>Tourism (overall)</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>Would like to visit the country if money was no object</td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td>The country is rich in natural beauty</td>
<td>25</td>
<td>31</td>
</tr>
<tr>
<td>The country is rich in historic buildings and monuments</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>The country has a vibrant city life and urban attractions</td>
<td>4</td>
<td>6</td>
</tr>
</tbody>
</table>

Source: Anholt Nation Brands Index, powered by Ipsos 2021
2.3 Perceptions of the UK (3)

Cultural associations

- Museums: Japan 11%, All markets 23%
- Music: Japan 13%, All markets 26%
- Films: Japan 16%, All markets 31%
- Sports: Japan 6%, All markets 16%
- Modern Design: Japan 8%, All markets 26%
- Opera: Japan 5%, All markets 6%
- Pop videos: Japan 3%, All markets 6%
- Sculpture: Japan 5%, All markets 16%
- Street Carnival: Japan 5%, All markets 16%
- Circus: Japan 1%, All markets 5%
- None: Japan 11%, All markets 23%

Adjectives describing a potential trip to the UK

- Fascinating: Japan 34%, All markets 36%
- Educational: Japan 13%, All markets 24%
- Romantic: Japan 21%, All markets 21%
- Exciting: Japan 13%, All markets 13%
- Relaxing: Japan 12%, All markets 23%
- Spiritual: Japan 5%, All markets 10%
- Stressful: Japan 4%, All markets 8%
- Risky: Japan 3%, All markets 6%
- Boring: Japan 3%, All markets 6%
- Depressing: Japan 3%, All markets 6%
- None: Japan 13%, All markets 32%

Source: Anholt Nation Brands Index, powered by Ipsos 2021
## 2.3 Perceptions of the UK (4)

Holiday wants and % saying destination is best place for... top 20

<table>
<thead>
<tr>
<th>Importance</th>
<th>Perception</th>
<th>GB</th>
<th>FR</th>
<th>IT</th>
<th>AU</th>
<th>US</th>
<th>GE</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.12</td>
<td>Have fun and laughter</td>
<td>12%</td>
<td>17%</td>
<td>10%</td>
<td>24%</td>
<td>28%</td>
<td>10%</td>
</tr>
<tr>
<td>5.88</td>
<td>Enjoy the beauty of the landscape</td>
<td>33%</td>
<td>41%</td>
<td>34%</td>
<td>48%</td>
<td>25%</td>
<td>34%</td>
</tr>
<tr>
<td>5.80</td>
<td>Chill/ slow down to a different pace of life</td>
<td>16%</td>
<td>17%</td>
<td>15%</td>
<td>34%</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>5.70</td>
<td>See world famous sites and places</td>
<td>39%</td>
<td>55%</td>
<td>33%</td>
<td>20%</td>
<td>26%</td>
<td>33%</td>
</tr>
<tr>
<td>5.67</td>
<td>Enjoy high quality food and drink (gourmet food)</td>
<td>4%</td>
<td>56%</td>
<td>14%</td>
<td>7%</td>
<td>7%</td>
<td>14%</td>
</tr>
<tr>
<td>5.55</td>
<td>Broaden my mind/ Stimulate my thinking</td>
<td>36%</td>
<td>40%</td>
<td>26%</td>
<td>29%</td>
<td>38%</td>
<td>26%</td>
</tr>
<tr>
<td>5.55</td>
<td>Visit a place with a lot of history/historic sites</td>
<td>47%</td>
<td>55%</td>
<td>35%</td>
<td>10%</td>
<td>8%</td>
<td>35%</td>
</tr>
<tr>
<td>5.55</td>
<td>Enjoy local specialities (food and drink)</td>
<td>12%</td>
<td>43%</td>
<td>23%</td>
<td>19%</td>
<td>10%</td>
<td>23%</td>
</tr>
<tr>
<td>5.41</td>
<td>Offers good value for money</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>13%</td>
<td>14%</td>
<td>5%</td>
</tr>
<tr>
<td>5.38</td>
<td>Good shopping</td>
<td>19%</td>
<td>35%</td>
<td>11%</td>
<td>14%</td>
<td>23%</td>
<td>11%</td>
</tr>
<tr>
<td>5.38</td>
<td>Do something the children would really enjoy</td>
<td>8%</td>
<td>8%</td>
<td>17%</td>
<td>47%</td>
<td>33%</td>
<td>17%</td>
</tr>
<tr>
<td>5.27</td>
<td>Explore the place</td>
<td>30%</td>
<td>31%</td>
<td>22%</td>
<td>27%</td>
<td>28%</td>
<td>22%</td>
</tr>
<tr>
<td>5.27</td>
<td>Be physically healthier</td>
<td>6%</td>
<td>8%</td>
<td>12%</td>
<td>33%</td>
<td>15%</td>
<td>12%</td>
</tr>
<tr>
<td>5.26</td>
<td>Feel special or spoilt</td>
<td>35%</td>
<td>43%</td>
<td>24%</td>
<td>24%</td>
<td>23%</td>
<td>24%</td>
</tr>
<tr>
<td>5.25</td>
<td>Feel connected to nature</td>
<td>13%</td>
<td>11%</td>
<td>17%</td>
<td>66%</td>
<td>27%</td>
<td>17%</td>
</tr>
<tr>
<td>5.17</td>
<td>Soak up the atmosphere</td>
<td>26%</td>
<td>26%</td>
<td>20%</td>
<td>26%</td>
<td>28%</td>
<td>20%</td>
</tr>
<tr>
<td>5.17</td>
<td>The people are friendly and welcoming</td>
<td>10%</td>
<td>11%</td>
<td>13%</td>
<td>31%</td>
<td>24%</td>
<td>13%</td>
</tr>
<tr>
<td>5.16</td>
<td>Easy to get around by public transport</td>
<td>24%</td>
<td>20%</td>
<td>18%</td>
<td>9%</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>5.12</td>
<td>Experience things that are new to me</td>
<td>11%</td>
<td>12%</td>
<td>11%</td>
<td>28%</td>
<td>37%</td>
<td>11%</td>
</tr>
<tr>
<td>5.05</td>
<td>It offers unique holiday experiences</td>
<td>15%</td>
<td>18%</td>
<td>15%</td>
<td>40%</td>
<td>27%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/Arkenford 2013
## 2.3 Perceptions of the UK (5)

**Holiday wants and % saying destination is best place for... bottom 20**

<table>
<thead>
<tr>
<th>Importance</th>
<th>Perception</th>
<th>GB</th>
<th>FR</th>
<th>IT</th>
<th>AU</th>
<th>US</th>
<th>GE</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.98</td>
<td>Enjoy peace &amp; quiet</td>
<td>17%</td>
<td>18%</td>
<td>17%</td>
<td>32%</td>
<td>11%</td>
<td>17%</td>
</tr>
<tr>
<td>4.97</td>
<td>A good place to visit at any time of year</td>
<td>12%</td>
<td>17%</td>
<td>13%</td>
<td>29%</td>
<td>20%</td>
<td>13%</td>
</tr>
<tr>
<td>4.94</td>
<td>Revisit places of nostalgic importance to me</td>
<td>22%</td>
<td>20%</td>
<td>15%</td>
<td>12%</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>4.87</td>
<td>Provides a wide range of holiday experiences</td>
<td>13%</td>
<td>16%</td>
<td>12%</td>
<td>44%</td>
<td>33%</td>
<td>12%</td>
</tr>
<tr>
<td>4.85</td>
<td>Experience activities/places with a wow factor</td>
<td>21%</td>
<td>29%</td>
<td>16%</td>
<td>33%</td>
<td>40%</td>
<td>16%</td>
</tr>
<tr>
<td>4.78</td>
<td>Do what I want when I want spontaneously</td>
<td>33%</td>
<td>1%</td>
<td>1%</td>
<td>6%</td>
<td>31%</td>
<td>1%</td>
</tr>
<tr>
<td>4.69</td>
<td>Get off the beaten track</td>
<td>15%</td>
<td>14%</td>
<td>6%</td>
<td>16%</td>
<td>14%</td>
<td>6%</td>
</tr>
<tr>
<td>4.64</td>
<td>Visit places important to my family's history</td>
<td>22%</td>
<td>25%</td>
<td>19%</td>
<td>16%</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>4.59</td>
<td>Have dedicated time with my other half</td>
<td>23%</td>
<td>29%</td>
<td>24%</td>
<td>32%</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>4.57</td>
<td>Do something environmentally sustainable/ green</td>
<td>9%</td>
<td>17%</td>
<td>5%</td>
<td>27%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>4.43</td>
<td>Get some sun</td>
<td>10%</td>
<td>17%</td>
<td>9%</td>
<td>49%</td>
<td>23%</td>
<td>9%</td>
</tr>
<tr>
<td>4.41</td>
<td>Meet and have fun with other tourists</td>
<td>20%</td>
<td>12%</td>
<td>14%</td>
<td>26%</td>
<td>36%</td>
<td>14%</td>
</tr>
<tr>
<td>4.37</td>
<td>Meet the locals</td>
<td>32%</td>
<td>10%</td>
<td>32%</td>
<td>16%</td>
<td>62%</td>
<td>32%</td>
</tr>
<tr>
<td>4.30</td>
<td>Fashionable destination</td>
<td>24%</td>
<td>57%</td>
<td>9%</td>
<td>6%</td>
<td>23%</td>
<td>9%</td>
</tr>
<tr>
<td>4.23</td>
<td>Go somewhere that provided lots of laid on entertainment/nightlife</td>
<td>15%</td>
<td>22%</td>
<td>21%</td>
<td>17%</td>
<td>49%</td>
<td>21%</td>
</tr>
<tr>
<td>4.18</td>
<td>To participate in an active pastime or sport</td>
<td>9%</td>
<td>9%</td>
<td>6%</td>
<td>23%</td>
<td>34%</td>
<td>6%</td>
</tr>
<tr>
<td>4.14</td>
<td>Experience adrenalin filled adventures</td>
<td>19%</td>
<td>12%</td>
<td>19%</td>
<td>26%</td>
<td>55%</td>
<td>19%</td>
</tr>
<tr>
<td>3.95</td>
<td>Party</td>
<td>20%</td>
<td>33%</td>
<td>21%</td>
<td>21%</td>
<td>46%</td>
<td>21%</td>
</tr>
<tr>
<td>3.92</td>
<td>Watch a sporting event</td>
<td>27%</td>
<td>36%</td>
<td>25%</td>
<td>15%</td>
<td>44%</td>
<td>25%</td>
</tr>
<tr>
<td>3.77</td>
<td>Do something useful like volunteering to help on a project</td>
<td>16%</td>
<td>20%</td>
<td>9%</td>
<td>15%</td>
<td>19%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/Arkenford 2013
### 2.3 Perceptions of the UK (6)

#### Motivations for choosing Britain as a holiday destination

<table>
<thead>
<tr>
<th>Motivation</th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural attractions</td>
<td>42%</td>
<td>52%</td>
</tr>
<tr>
<td>Somewhere English-spoken</td>
<td>34%</td>
<td>32%</td>
</tr>
<tr>
<td>Security / safety</td>
<td>32%</td>
<td>27%</td>
</tr>
<tr>
<td>Wanted to go somewhere new</td>
<td>26%</td>
<td>23%</td>
</tr>
<tr>
<td>Wide variety of places to visit</td>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>A culture different from own</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>Countryside/natural beauty</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>Ease of getting to the country</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Contemporary culture</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>Easy to get around</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Accommodation (variety &amp; quality)</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Visiting friends or relatives</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Try local food and drink</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>The climate / weather</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Vibrant cities</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>A good deal</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>A mix of old and new</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Wide range of holiday activities</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Cost of staying in the destination</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Easy to get plan/organise</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Meeting locals</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Easy to visit with children</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Visit a film/TV location</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Watching sport</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/IPSOS 2016, adjusted data, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)
2.3 Perceptions of the UK (7)

Sought-after Britain activities – top 18

- Enjoy a traditional afternoon tea (50% all markets, 66% Japan)
- Stay the night in a fairy-tale castle (47% all markets, 65% Japan)
- A food tour of one of London's best foodie markets (52% all markets, 63% Japan)
- Shop for quirky gifts in a seaside town (41% all markets, 63% Japan)
- Ride the scenic ‘Hogwarts Express’ (Harry Potter train) through the Scottish Highlands (47% all markets, 62% Japan)
- Walk along Hadrian's wall in Northern England (38% all markets, 50% Japan)
- Drive through the countryside of England (38% all markets, 53% Japan)
- Explore Britain's history using a historic cities app to uncover the stories (47% all markets, 53% Japan)
- Go punting (pole boating) on the rivers of Oxford or Cambridge (30% all markets, 43% Japan)
- Visit Windsor Castle where Harry and Meghan got married (42% all markets, 47% Japan)
- Explore the Beatles Story in their home city of Liverpool (40% all markets, 40% Japan)
- Take a canal boat tour through the waterways of England (39% all markets, 53% Japan)
- Watch a musical in London's West End (43% all markets, 47% Japan)
- Spot wildlife in the Scottish Highlands (42% all markets, 43% Japan)
- Go hiking on the South West coast (36% all markets, 42% Japan)
- A wine tour in the vineyards of England (36% all markets, 41% Japan)
- Share stories over a pint with locals in a cosy rural pub (33% all markets, 38% Japan)
- Do a cycle tour in Britain (27% all markets, 33% Japan)

Source: Anholt Nation Brands Index, powered by Ipsos 2020
### Sought-after Britain activities – bottom 17

<table>
<thead>
<tr>
<th>Activity</th>
<th>All markets</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hunt for The Loch Ness Monster with a boat cruise on Loch Ness</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Blend your own whisky in a world famous Scotch whisky distillery</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Shop for vintage fashion and antiques</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Take a street art tour in one of Britain's modern cities</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>Visit locations from my favourite TV/film shows filmed on location in Britain</td>
<td>34%</td>
<td>33%</td>
</tr>
<tr>
<td>Climb one of Britain's highest mountains for epic views</td>
<td>31%</td>
<td>30%</td>
</tr>
<tr>
<td>Learn how to make British Food in a cookery class</td>
<td>27%</td>
<td>26%</td>
</tr>
<tr>
<td>Visit Madame Tussauds</td>
<td>27%</td>
<td>26%</td>
</tr>
<tr>
<td>Hear the latest British bands at a music festival</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>Follow a Gin Trail around London</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>Relax in Bath spa's rooftop pool</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>Watch a Premier League football match live</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>Experience a zip line adventure in Wales</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Watch a Premier League football match in a pub with locals</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Watch your favourite movie at a London rooftop cinema</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>Go ice-skating outside one of London's iconic buildings</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>Go white water rafting</td>
<td>20%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Source: Anholt Nation Brands Index, powered by Ipsos 2020
Understanding the market

Chapter 3
3.1 Structural drivers

- Japan is a parliamentary constitutional monarchy, composed of 4 main islands – Hokkaido, Honshu, Shikoku, and Kyushu – and over 6,800 smaller islands and islets. The country is divided into 47 prefectures.

- The Japanese mainly reside near the coast, with about a third of them concentrated in and around the capital, Tokyo, on the central Kanto plain on Honshu. Over half of the Japanese population live in the major urban areas: Tokyo (37.3m), Osaka (19.1m), Nagoya (9.6m), Kitakyushu-Fukuoka (5.5m), Shizuoka-Hamamatsu (2.9m), and Sapporo (2.7m).

- Japan has an ageing population, and is one of the oldest populations in the world (life expectancy is 85 years old) and one of the lowest birth and fertility rates in world (respectively 7.5 births for 1,000 population, and 1.37 children born per woman, according to 2020 estimates). As a consequence the Japanese population is expected to fall in the coming years, though the population of seniors will rise.

- Full-time workers are entitled to between 10 and 20 days of paid annual leave a year, depending on seniority. In addition to those, there are 16 national public holidays. Since 2000 the Happy Monday system has moved some national holidays to Monday to obtain a long weekend.

Source: CIA World Factbook, Japan Payroll, Office Holidays, UN Population Prospects
3.1 Structural drivers: general market overview

General Market Conditions

- Japan has a highly developed free market economy, and is the third largest in the world by nominal GDP, and the fourth largest by purchasing power parity.
- A key feature of Japan’s economy is their world ranking automobile manufacturing industry, alongside being often ranked among the world’s most innovative countries when it comes to patent filings.
- While Japan has one of the lowest economic growth rates in the world, this is largely due to the shrinking population; its GDP per capita growth is similar to other advanced markets.

Key demographic and economic data

<table>
<thead>
<tr>
<th>Measure (2021)</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (m)</td>
<td>126.0</td>
</tr>
<tr>
<td>GDP per capita PPP (US$)</td>
<td>41,271</td>
</tr>
<tr>
<td>Annual average GDP growth over past decade (%)</td>
<td>0.5</td>
</tr>
<tr>
<td>Annual average GDP growth in 2021 (%)</td>
<td>1.8</td>
</tr>
</tbody>
</table>

Economic indicators (%)

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real GDP growth</td>
<td>0.0</td>
<td>-4.7</td>
<td>1.8</td>
<td>3.3</td>
</tr>
<tr>
<td>Real consumer spending growth</td>
<td>-0.2</td>
<td>-5.9</td>
<td>1.2</td>
<td>3.0</td>
</tr>
<tr>
<td>Unemployment rate</td>
<td>2.4</td>
<td>2.8</td>
<td>2.8</td>
<td>2.6</td>
</tr>
</tbody>
</table>

Source: Oxford Economics, Deloitte, Japan Times
3.1 Structural drivers: demographic and social indicators

Population dynamics

<table>
<thead>
<tr>
<th>Measure</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population growth rate in 2021</td>
<td>-0.3%</td>
</tr>
<tr>
<td>Population aged 65+</td>
<td>29%</td>
</tr>
<tr>
<td>Median age</td>
<td>48.6</td>
</tr>
<tr>
<td>Urban population</td>
<td>92%</td>
</tr>
</tbody>
</table>

- Japan is the second oldest country in the world after Monaco when ranking the population’s median ages. In addition to that, total fertility in Japan has also been falling in the last few decades.
- As a consequence, the population in Japan is forecast to decrease, falling 2% between 2021 and 2025.
- However, to 2030, total fertility should continue to increase again. Meanwhile, the median age is still forecast to increase, although at a slower rate.
- Over 9-in-10 people in Japan live in a city or its agglomeration. Japan boasts the largest city in the world: Tokyo, with an agglomeration of over 37 million inhabitants, over a quarter of the overall Japanese population.
- Japan ranks as the 2nd largest source market of HNWIs in 2020, with over 3.5 million HNWIs. The volume of HNWIs grew by 6% between 2019 and 2020.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>1980</th>
<th>2015</th>
<th>2030</th>
<th>2040</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median age (in years)</td>
<td>32.5</td>
<td>46.4</td>
<td>52.1</td>
<td>54.1</td>
</tr>
</tbody>
</table>


* HNWI stands for High Net Worth Individual, definition in appendix
Please find the most up-to-date exchange rate trend based on monthly averages on our website.

Source: Bank of England
3.2 Consumer trends

- In 2019, there were over 20 million departures made by Japanese residents overseas. This was up for the fourth year in a row (6% over 2018), and was the highest number of departures seen on record.
- The Japanese tourist board reported that this growth was led by twenty-somethings, especially those in their early 20s, as a result of the job climate improving with high employment rates and salaries for young people.
- The Henley Passport Index ranked the Japanese passport the most powerful in the world in 2021. However, only 23% of Japanese citizens have a passport. Some have attributed this to safety concerns around overseas travel. Security and safety plays an important role in the decision of a holiday destination for Japanese travellers.
- Japanese travellers consider Hawaii as their most desirable destination, followed by Italy, France, Northern Europe and Australia. Young people in particular express a desire to see new places they have never been before.
- When it comes to inbound travel, the 2020 Tokyo Olympic Games were expected to attract a million visitors a day to the capital. However, due to the coronavirus pandemic, the Games were postponed to 2021, with spectators prohibited.

Source: Henley Passport Index, Quartz, JTB
3.2 Consumer trends: overall trends pre COVID-19

Workcation

- The Japanese government has pursued a national ‘workstyle reform’ since 2017, with the goal of adopting ‘nomad work’ (a workstyle not dependent on any particular location).
- ‘Workcation’ is viewed favourably especially among younger generations, with 32% of people who travelled on business in 2019 believing it will become easier to take vacation as workcation (doing work while on vacation) and bleisure (adding vacation to business travel) becomes more common.
- Corporations are seeking to boost government-promoted ‘relational populations’ (people who engage with a local community in ways that take a different form than residency and tourism) as well as greater productivity and work life balance among workers.

Individual travel

- For both domestic and overseas travel, the trend towards individual travel is advancing. The percentage of FIT travellers has grown year by year. At the same time, there has been a significant drop in ‘skeleton tours’ (package tours that provide only accommodations and transportation, not activities). With more purchases being made on smartphones, a greater number of people now purchase accommodation and transport separately to avoid complicated search and input procedures when booking reservations.
- However, ‘escorted tours’ with a tour guide have maintained a similar, albeit small, percentage over the years (5% domestic travel, 13% overseas), and are particularly popular for destinations which travellers are visiting for the first time.

Overseas travel and audiences

- In late 2019, men and women in their 20s, and women in their 50s, were more likely to say that they hoped to increase their total spending on travel in the coming year. There had been a strong employment environment, resulting in winter 2019 bonuses at major corporations reaching their highest ever. Higher incomes are reflected in consumption patterns, and Gen Z are a generation more focussed on the world as part of a global society, and were forecast to be the driving force of overseas travel in 2020.
- At the same time, women around the age of 50, who enjoyed abundant consumption during the Bubble Era, have now finished raising their children and are starting to have time of their own. This generation has a high interest in European culture, and have a desire to do things differently from other people.

Source: JTB Report 2020
3.2 Consumer trends: impact of COVID-19

Top European destinations for an international leisure trip*

<table>
<thead>
<tr>
<th>Country</th>
<th>France</th>
<th>Italy</th>
<th>Germany</th>
<th>Spain</th>
<th>Britain</th>
<th>Belgium</th>
<th>Finland</th>
<th>Switzerland</th>
<th>Sweden</th>
<th>Austria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited (%)</td>
<td>40%</td>
<td>39%</td>
<td>35%</td>
<td>28%</td>
<td>28%</td>
<td>22%</td>
<td>22%</td>
<td>21%</td>
<td>20%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Key activators for an international leisure trip

<table>
<thead>
<tr>
<th>Activator</th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>54%</td>
<td>34%</td>
</tr>
<tr>
<td>Receiving a COVID-19 vaccination</td>
<td>48%</td>
<td>43%</td>
</tr>
<tr>
<td>Removal of quarantine policies in home country</td>
<td>36%</td>
<td>28%</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination countries</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>Stable political environment in destination country</td>
<td>28%</td>
<td>19%</td>
</tr>
</tbody>
</table>

- Due to the COVID-19 outbreak, Oxford Economics estimates that visits from Japan to the UK were down by 76% in 2020, and that visits will further decline by 77% in 2021.
- The second wave of VisitBritain’s International Recovery Sentiment tracker (fieldwork March-April 2021) revealed that 42% of Japanese respondents planned to travel internationally for a leisure trip in the next 12 months, with 61% planning to travel for a holiday.
- Of these, 37% are considering travelling to Europe, and 10% are considering Britain. Britain was ranked fifth within Europe for consideration, after France, Italy, Germany, and Spain.
- Japanese travellers’ top activators for an international trip follow a similar pattern to global preferences; however, they are much more highly motivated by a decrease in coronavirus cases in their destination country. They are also particularly motivated by the removal of quarantine policies in their own country vs. the average.

Source: IPS, Oxford Economics/VisitBritain, TCI/VisitBritain/VisitScotland/Visit Wales/London&Partners 2021 *percentages show proportion within those considering a trip to Europe. Note: Sentiment data is from a tracking study, and results may change in subsequent waves.
3.3 Booking and planning

- Japanese visitors have slightly longer lead-in times compared to most other inbound markets, especially for looking at options and prices and booking their trip to Britain.
- 37% of visitors booked their trip to Britain 3 to 6 months in advance, and a similar share did so only 1 to 2 months in advance.
- Japanese holiday visitors to Britain are slightly less likely to have booked their transport and accommodation separately than the average visitor (45% vs 48% respectively).
- Whether they booked those elements separately or together, most Japanese holiday visitors booked their trip online, mostly on their laptop or desktop. However, the number of Japanese people booking travel products on smartphones has increased in recent years.
- While almost a third of Japanese holiday visitors to Britain prefer booking a transport and accommodation package face-to-face, booking holiday packages through the phone is also more common. In general, though, a traditional tour operator/travel agency with an online presence is the main popular booking portal for Japanese outbound holidaymakers.
- Japanese visitors would also be more likely to book activities before their trip to Britain rather than during.

Source: VisitBritain/IPSOS 2016
3.3 Booking and planning: booking channels and ticket sales (1)

How trips to Britain were booked

<table>
<thead>
<tr>
<th>Booking method</th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>84%</td>
<td>85%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>By phone</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

- Japanese visitors are quite digital-savvy, with most of them booking transport to Britain and accommodation online, when those elements were bought separately.
- However, when booking them as a holiday package, they are more likely than the average visitor to book face-to-face (32% vs 27% for the all-market average).
- Most Japanese booked their Britain holidays through a travel agent, tour operator or travel comparison website.

How trips to Britain were booked: accommodation only

<table>
<thead>
<tr>
<th>Booking method</th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>78%</td>
<td>70%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>By phone</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Did not book/stayed with friends/relatives</td>
<td>11%</td>
<td>17%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>

How trips to Britain were booked: travel + accommodation

<table>
<thead>
<tr>
<th>Booking method</th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>58%</td>
<td>64%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>32%</td>
<td>27%</td>
</tr>
<tr>
<td>By Phone</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)
3.3 Booking and planning: booking channels and ticket sales (2)

Propensity to make a purchase before or during trip

- Apart from a guided sightseeing tour before their trip, they are less likely to purchase activities than the all-market average.
- Overall, Japanese visitors tend to purchase their holiday activities ahead of their trip.
- However, 75% of the Japanese respondents who visited Britain said they like to be spontaneous on holiday and decided on some of their itinerary at the last minute.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)
# 3.3 Booking and planning: lead-times (1)

## Decision lead-time for visiting Britain

### Starting to think about trip

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>48%</td>
<td>49%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>36%</td>
<td>31%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

### Deciding on the destination

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>45%</td>
<td>38%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>1%</td>
<td>7%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>5%</td>
<td>3%</td>
</tr>
</tbody>
</table>

### Looking at options/prices

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>44%</td>
<td>37%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>31%</td>
<td>27%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>

### Booking the trip

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>37%</td>
<td>32%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>37%</td>
<td>28%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>12%</td>
<td>21%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/IPSOS 2016, base: visitors
3.3 Booking and planning: lead-times (2)

Decision lead-time for visiting Britain: commentary (tables on previous page)

- Japanese visitors had slightly longer lead-times than the global average when preparing their visit to Britain.
- Fewer Japanese visitors would start thinking about their trip or deciding on visiting Britain in the month leading to their departure than the all-market average (1% vs 5% and 1% vs 7% respectively).
- Only a few Japanese visitors would have started looking at their options and prices to visit Britain within the month prior to their trip, 3% compared to 12% across all markets.
- Only about 1-in-10 visitors booked their trip to Britain in the same timeframe, while about 2-in-10 did so across all markets on average.
- Between 3 and 6 months of their trip is a critical time in the planning of a trip for Japanese people: 45% of them decided on visiting Britain in that timeframe, while 44% were starting to look at options and prices and 37% booked the main elements of their trip. A further 37% of Japanese visitors book between 1 and 2 months of their trip to Britain.
- Only slightly more Japanese visitors book their travel to Britain and accommodation together than booked them separately (52% vs 45% respectively).

Source: VisitBritain/IPSOS 2016, base: visitors
3.4 Reaching the consumer

- Mobile technology is highly developed in Japan.
- The Japanese are avid consumers of blogs.
- Roughly three quarters of the population uses social media, with user figures almost 94 million, and the most popular platforms being YouTube and LINE.
- ‘Wallet phones’ allow the Japanese to make purchases through a built-in smartcard in the device, in some respects equivalent to a bank debit card in Britain.
- For some Japanese, ‘planning’ is one of their favourite parts of a trip away from home.
- Travel guidebooks and tour operator brochures or websites have more of a role as sources of information in Japan than is the case in the typical market.
- Almost as many holiday visits to Britain are booked through a travel agent as directly with the carrier but the majority are booked on the Internet rather than face-to-face.

Source: Hootsuite Digital
3.4 Reaching the consumer: print media landscape

Newspapers

- Print media are still quite influential in Japan, thanks to a good reputation and wide audience. National newspapers sell in millions of copies, and some also have morning and evening editions.
- However, as Japan has a very advanced digital landscape, most newspapers also have an online version. Access to online newspapers can sometimes be paid-for as there has been a decrease in advertising revenues in this print sector.
- Main titles include: Asahi Shimbun (daily, with pages in English), Yomiuri Shimbun (daily, with pages in English), Nihon Keizai Shimbun, The Japan Times (in English), Mainichi Shimbun/ Mainichi Daily News (daily, with pages in English), Nikkei Asian Review (in English), Sankei Shimbun (daily) and Nikkan Sports.
- Kyodo and Japan Today are two prominent news agency in the Japanese market. They are also present on internet and accessible in English. Bilingual communications and advertising (in English and Japanese) are quite common in this market, but promotional material should include some elements in Japanese at least.

Magazines

- The effects of the economic downturn have been felt in the media sector since late 2008 and a number of well-known magazines have stopped publication. Newspapers also are increasingly finding it difficult to generate ad revenue. However, internet revenue continues to grow.
- Digitalisation is also important in Japan: online newspapers and magazines are getting more interest. Many magazines have branched out onto the Internet and usually feature content that is not found on their print version.

<table>
<thead>
<tr>
<th>Newspapers</th>
<th>Other information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asahi Shimbun</td>
<td>Daily, English-language pages</td>
</tr>
<tr>
<td>Yomiuri Shimbun</td>
<td>Daily, English-language pages</td>
</tr>
<tr>
<td>Mainichi Daily News</td>
<td>English-language pages</td>
</tr>
<tr>
<td>Sankei Shimbun</td>
<td>Daily</td>
</tr>
<tr>
<td>Nikkei Asian Review</td>
<td>English-language pages</td>
</tr>
<tr>
<td>The Japan Times</td>
<td>English-language</td>
</tr>
<tr>
<td>Kyodo</td>
<td>English-language pages</td>
</tr>
<tr>
<td>Japan Today</td>
<td>Online news, in English</td>
</tr>
</tbody>
</table>
3.4 Reaching the consumer: broadcast media landscape

TV
- 80% of Japanese say that they watch terrestrial broadcasting every day, but less than 20% say that they pay to watch television. During the coronavirus pandemic, 30% said that they had increased their TV and video viewing time. Despite some indications of declining interest in TV, there was still a deeply rooted need to watch it for up to date news and comprehensive information.
- There are 5 major private network/digital terrestrial television stations including one national station - NHK (equivalent of BBC). Other main national TV players are TV Asahi, Fuji TV, Nippon TV (NTV), and Tokyo Broadcasting System (TBS).
- The broadcasting format in Japan changed from analogue to digital terrestrial in July 2011 and the number of digital channels has grown. Satellite and cable pay TV are quite popular in Japan.
- Video streaming services are watched by 81% of users in Japan, and is becoming popular across all age groups. Usage of video streaming services is higher than TV.
- Travel is a popular topic for television shows; there are various weekly shows about travel on the five major stations. These range from a daily visual documentary taken from the window of a train to 1h episodes about world heritage sites.

Radio
- The radio landscape is quite limited in this market with only a few stations listened to by only 7% of the population. The FM radio stations tend to have programming targeted at youth with music, and commercial programming and the AM radio stations target the older demographic, with mostly news, sports, traditional music, horse racing and foreign language learning.
- NHK public service operates different radio channels, including a news channel, a classic-music based one, a cultural/educational one, as well as the external service Radio Japan.
- Main radio stations are Tokyo-based, such as Inter FM, J-Wave, Tokyo FM and TBS Radio.

<table>
<thead>
<tr>
<th>TV channels</th>
<th>Radio stations</th>
<th>Top OTT platforms</th>
</tr>
</thead>
<tbody>
<tr>
<td>NHK</td>
<td>NHK – Radio 1, Radio 2, FM Radio, Radio Japan</td>
<td>Amazon Prime Video</td>
</tr>
<tr>
<td>TV Asahi</td>
<td>Inter FM</td>
<td>Niconico</td>
</tr>
<tr>
<td>Fuji TV</td>
<td>J-Wave</td>
<td>Tver</td>
</tr>
<tr>
<td>Nippon TV (NTV)</td>
<td>Tokyo FM</td>
<td>ABEMA</td>
</tr>
<tr>
<td>Tokyo Broadcasting System (TBS)</td>
<td>TBS Radio</td>
<td>GYAO!</td>
</tr>
</tbody>
</table>
3.4 Reaching the consumer: internet and social media

- Japan is ranked as the seventh largest internet market globally, with 119 million internet users, and this country enjoys some of the highest levels of connectivity in the world. Internet penetration was at 93% in early 2021.
- Roughly three quarters of the population uses social media, with user figures almost 94 million, a growth of 4 million over the course of 2020.
- However, people in Japan spend considerably less time using connected devices than the rest of the world, at just 4.5 hours per day, compared to a global average of 7 hours. However, Japanese people spend almost twice as much time online as they do watching television.
- Japanese social media users can be distinguished from western users in that they are highly sensitive when it comes to privacy and sharing personal information online. They are also less inclined to post pictures with their faces, commonly using their pets, inanimate objects or anime characters as their profile pictures.

<table>
<thead>
<tr>
<th>Social media rankings</th>
<th>Mobile app rankings</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>LINE</td>
</tr>
<tr>
<td>LINE</td>
<td>Twitter</td>
</tr>
<tr>
<td>Twitter</td>
<td>Instagram</td>
</tr>
<tr>
<td>Instagram</td>
<td>Yahoo Japan</td>
</tr>
<tr>
<td>Facebook</td>
<td>Amazon</td>
</tr>
<tr>
<td>Facebook Messenger</td>
<td>Facebook</td>
</tr>
<tr>
<td>Skype</td>
<td>Yahoo Japan Weather</td>
</tr>
<tr>
<td>TikTok</td>
<td>Rakuten Chiba</td>
</tr>
<tr>
<td>Pinterest</td>
<td>PayPay</td>
</tr>
<tr>
<td>Snow</td>
<td>Mercari</td>
</tr>
</tbody>
</table>

Sources of new brand discovery

- Search engines: 42%
- Ads on television: 34%
- TV shows or films: 29%
- Product comparison websites: 28%
- Retail websites: 26%
- Brand/product websites: 24%
- Ads on websites: 22%
- Word of mouth: 20%
- Consumer review websites: 20%
- In store displays: 16%

Source: Hootsuite Digital, Statista
3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

- To keep in touch with people at home: Japan 18%, All markets 44%
- To post / upload photos of my holiday: Japan 21%, All markets 39%
- Look for recommendations for places to eat or drink: Japan 22%, All markets 30%
- I have not used social media at all on this type of holiday: Japan 35%, All markets 29%
- Share with others where you are / what you are doing while on holiday: Japan 13%, All markets 29%
- To let people know where I am at a given moment (e.g. checking in on Facebook): Japan 14%, All markets 25%
- To help you plan / decide where to go or what to see or what to do: Japan 23%, All markets 23%
- Ask for advice on where to go or what to do: Japan 12%, All markets 20%
- Share my own advice or recommendations about visiting where I...

- Japanese international travellers are usually less likely to use social media at all whilst on holiday in a foreign destination than the all-market average.
- They would be as likely as the all-market average to use them as a way to plan or decide where to go, what to see, or what to do. Other popular uses of social media during a holiday in a foreign destination among Japanese international travellers include looking for recommendations for places to eat or drink, and posting/uploading photos of their holidays.
- On average fewer Japanese international travellers want to stay connected when on holiday than the all-market average (60% vs 69% respectively). They would also be less likely to consider their smartphone essential when going on holiday, but proportionally more of them would consider their tablet an essential item when they go on holiday (67% vs 56% across all markets).

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?, Statista 2019
### 3.4 Reaching the consumer: influences (top 14)

#### Influences on destination choice – top 14

<table>
<thead>
<tr>
<th>Source</th>
<th>All markets</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>A travel guidebook</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>Travel agent or tour operator website</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>An accommodation provider/ hotel website</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>Websites providing traveller reviews of destinations [e.g. TripAdvisor]</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Information from search engines [e.g. Google]</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Travel programme on TV</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Talking to friends / relatives / colleagues</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Travel agent or tour operator brochure</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Looking at prices of holidays/flights on price comparison websites</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>An official tourist organisation website or social media site for the country or...</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>Travel blogs / forums</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>An official tourist brochure for the country / city / region</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Direct advice from a travel agent/tour operator (face-to-face, over the phone)</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>A travel feature / article in a magazine or newspaper</td>
<td>18%</td>
<td></td>
</tr>
</tbody>
</table>

Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)
3.4 Reaching the consumer: influences (bottom 14)

Influences on destination choice – bottom 14

- Images / information in adverts in a magazine or newspaper: 12%
- A special offer or price deal you saw advertised offline e.g. in a newspaper: 15%
- A special offer or price deal you saw advertised online: 13%
- Talking to friends or family in your social network (e.g. via Facebook / Twitter): 13%
- Images / information in TV adverts: 11%
- Travel app: 12%
- Images or videos your friends or family have posted to social media: 11%
- Images / information in online adverts: 15%
- Articles on an online encyclopaedia e.g. Wikipedia, Wikitravel: 12%
- Images or videos from a photo/video sharing social network site: 10%
- Images / information on billboards / poster adverts: 6%
- Seeing social media posts from celebrities talking about their holiday destinations: 6%
- Travel programme on radio: 5%
- Information in radio adverts: 4%

Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)
3.4 Reaching the consumer: influences

Likelihood to visit a place featured in a movie, TV series or book

Source: Anholt Nation Brands Index 2017: Have you ever visited a film or TV location whilst on a holiday/vacation abroad? If yes: To what extent was the film or TV location a reason for you choosing to take a trip to that destination? If no but would be interested: To what extent would a film or TV location be the reason for you choosing to take a trip to a specific destination?
Access and travel trade

Chapter 4
4.1 Access: key facts

- Most Japanese visitors come to the UK by plane. In 2019, 12% arrived through the tunnel, virtually all via Eurostar.
- The Japanese need no visa to visit Britain. Japanese visitors flying out of Britain pay a £82 Air Passenger Duty.
- In 2019, both international airports in Tokyo, and Kansai International Airport, had direct, non-stopping links to London Heathrow. Those routes were served by British Airways, Japan Airlines (JAL), and ANA. An additional direct route between Japan and the UK existed, is flown by Aeroflot, but it included a stop in Russia.
- Seat capacity on direct, non-stopping flights from Japan to Britain shrank from 2009 to 2015, but grew once again by 27% up to 2019. British Airways opened a direct, non-stopping flight from Osaka in March 2019.

Due to the COVID-19 outbreak, seat capacity between Japan and the UK was down by 59% in 2020 compared to 2019. Seat capacity in 2021 was 60% lower than 2019. However, seat capacity increased in the second half of 2021, and is scheduled to increase further in early 2022.

Source: Apex, non-stop flights only

87% of Japanese visitors travel to the UK by plane

<table>
<thead>
<tr>
<th>Measure</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly aircraft departures</td>
<td>38</td>
</tr>
<tr>
<td>Weekly seat capacity</td>
<td>8,543</td>
</tr>
<tr>
<td>Airports with direct routes in Japan</td>
<td>3</td>
</tr>
<tr>
<td>Airports with direct routes in Britain</td>
<td>1</td>
</tr>
</tbody>
</table>
4.1 Access: mode of transport

Visits by mode of transport

Sea and tunnel travel (000s) in 2019

Annual share by mode (2019)

Source: International Passenger Survey by ONS
4.1 Access: capacity

Annual airline seat capacity trends

Airline seat capacity by carrier (2019)

Source: Apex 2019, non-stop flights only
4.2 Travel trade: general overview

- The Japanese travel industry has become more specialised and more customer-focused as a result of customers becoming more discerning and sophisticated, now having better knowledge about the destinations they want to go to. The Free Independent Travel (FIT) segment is becoming more important, which is another consequence of the market becoming more mature.
- It is structured into 3 main levels of travel companies, most of them having joined the Japan Association of Travel Agents (JATA), which is also one of the three organisers of the main travel fair in Japan, Tourism Expo Japan.
- Many travel agencies have increased their online presence as travel booking via the Internet has become more common – however, a lot of long-haul travel is still booked through a traditional high street agent.
- With an ageing population, more travel products are now geared towards the 65+ age group than before, since they also have both the money and time to travel abroad.

Source: JTB Report 2018
4.2 Travel trade structure

<table>
<thead>
<tr>
<th>Rank</th>
<th>Main travel agencies (65% of all Japanese inbound market)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>JTB Group</td>
</tr>
<tr>
<td>2</td>
<td>H.I.S</td>
</tr>
<tr>
<td>3</td>
<td>Hankyu Travel International</td>
</tr>
<tr>
<td>4</td>
<td>Kinki Nippon Tourant</td>
</tr>
<tr>
<td>5</td>
<td>Nippon Travel Agency</td>
</tr>
<tr>
<td>6</td>
<td>Jalpak</td>
</tr>
<tr>
<td>7</td>
<td>Nisshin Travel Service</td>
</tr>
<tr>
<td>8</td>
<td>M.O Tourist</td>
</tr>
<tr>
<td>9</td>
<td>Tobu Top Tours</td>
</tr>
<tr>
<td>10</td>
<td>Nippon Express</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top 5 wholesalers for the UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>JTB World Vacations</td>
</tr>
<tr>
<td>2</td>
<td>Nippon Travel Agency</td>
</tr>
<tr>
<td>3</td>
<td>Kinki Nippon Tourant</td>
</tr>
<tr>
<td>4</td>
<td>JALPAK</td>
</tr>
<tr>
<td>5</td>
<td>ANA Sales</td>
</tr>
</tbody>
</table>

Major operators

Dealing with the trade is still very relevant for the Japanese market despite an increase of the Free Independent Travel (FIT) market in recent years.

Travel distribution is highly regulated in Japan, with actors being grouped in three different categories of travel operators and the travel agencies. The major operators are present all along the distribution chain and involved in each category, with wholesalers and retail offices of those large ‘General Travel Agencies’, or GTAs.

- First level agencies (GTA), who package, wholesale and retail international and domestic tours.
- Second level agencies, who package and wholesale domestic tours only. They sell international products (produced by the GTA) to consumers as a retail travel agent. They do not package or wholesale international product.
- Third level agencies: these retail travel agencies sell international and domestic packages made by GTAs and second tier agencies. They have no wholesaling / packaging departments.
- Other agencies: they sell domestic and international tours, but have no wholesaling, packaging departments. They are usually not a member of the Japan Association of Travel Agents.

Nationwide organisations are quite important too; among these, three are involved in the running of the largest travel fair in Japan:

- JTTA, Japan Travel and Tourism Association: it promotes domestic tourism as well as maintaining good relations with neighbouring countries.
- JATA, Japan Association of Travel Agents: aims to improve the quality of services provided to travellers to and from Japan.
- JNTO, Japan National Tourism Organisation: has aimed to promote inbound tourism to Japan since 1964.
4.2 Travel trade structure

Wholesalers and large travel agencies

- The wholesale business model still dominates outbound travel trade. Wholesalers compete for retail business and most of them have a ‘same-name’ retail chain, which operates with relative autonomy. Most GTA branch offices sell their own and other brands’ packages through group salesforce, a FIT section and retail counters.
- Wholesalers have begun packaging tours on a market demand basis taking advantage of last minute trends and peak/trough travel periods. Major wholesalers provide national coverage by distributing packages through their own and other retail outlets.
- Most of the large Japanese travel agencies operate their own inbound tour companies in the UK. These inbound tour operators buy products, operate tours and provide product information for their parent companies.
- The two major brochure seasons are Shimo-ki (October-March) and Kami-ki (April-September).

Main tour operators and travel agencies

- HIS, one of the top three tour operators in Japan, is now widely followed on social media, for example through its Facebook and Instagram accounts.
- Major travel agencies such as JTB and HIS are bigger brands than the airlines themselves and consumer advertising is on the whole executed by these agencies, often with celebrity endorsements.

Trends and challenges

- Low-cost carriers, including Air Asia X, are continuing to develop a market for travel to short and mid-haul destinations from Japan.
- The fragmentation of consumer travel demand is putting huge pressure on a number of established travel firms. Travellers have become more discerning and sophisticated, and are gradually taking responsibility for their own travel plans, and seeking value for money and lifestyle experiences. As they become better educated about destinations, the Japanese travel industry is starting to shift towards more specialisation and a bigger focus on the customers. JTB started to change its products every two months in 2016, for instance, and Airbnb’s Samara design studio’s first project was a community centre in Yoshino, Japan, emphasizing the importance of local experiences.
- Major travel trade firms and airline groups have developed online booking sites. However, they need to maintain offline sales as well, as a significant proportion of Japanese travellers still book face-to-face.
- Around 50% of overseas trips are full or free time package tours, 34% are individually arranged tours (air and hotel skeleton package) and 15% are agent arranged group tours (MICE, religion, school trip) and are all booked through the travel trade.

Source: Business Insiders, VisitBritain/IPSOS 2016
4.2 Travel trade: doing business

**Time difference:** GMT +9 (summer time+8)

**Business hours:** usually from 9:00 to 17:00.

**Where to find the trade:** most Japanese leading travel agents and tour operators are concentrated in Tokyo and Osaka. There is also some interest in European destinations in the cities served by direct flights (Nagoya and Fukuoka, for example).

**Transport:** There is an excellent road network across Japan. JR (Japan Railways) is reliable, fast and comfortable and the rail network covers most places in Japan. However, almost all big cities suffer from traffic jams. Parking fees and taxi travel can also be expensive. In Tokyo, 1.5km costs c. ¥410. All major cities have very good public transport system though: tube and buses are punctual and operate frequently.

**Tips for doing business:**

The Japanese see commitment to the customer, quality, and value for money as essential and will not compromise on them. You must convince them that you will not compromise either.

Understanding the Japanese culture is key: quality, human relationships, perseverance, value for money, and long term commitment are highly valued.

Getting business from Japan depends very often on personal contact. Time must be invested in them, either through a series of visits to, or representation in, Japan.

**Dress:** formal, conservative business attire, such as dark colour suits and white shirts or blouses, are preferred; avoid dressing casually. If possible, it is better to wear shoes that are easy to slip on and off.

**Gifts:** presenting gifts at formal meetings is customary – small giveaways from your local destination should be appreciated.

**Language:** Japanese may avoid directly saying “no”, and tend to prefer saying something may be difficult instead. Doing the same might be appreciated.

**Promotional material** should be detailed, and in Japanese. You are welcome to send a copy of your press releases to the VisitBritain office in Japan if you want them to consult and advise you on your offer and how suited it might be for Japan.

**Planning cycle** is about six months: spring to summer tours are sold in January, and autumn to winter tours in August.

**Trade exhibitions:** Tourism Expo Japan is the market's largest tourism show, organised by JTTA, JATA and JNTO. It runs for 4 days of which 2 days are for the press and B2B (trade) and 2 days for B2C (public). It usually takes place in September.

Source: Japan Guide, Numbero, T-Expo Japan
4.2 Travel trade: meetings

Greeting
- When meeting someone for the first time, you should greet him by saying “Hajime-mashite” which basically means “to begin a new acquaintance”.
- Bowing is the traditional Japanese greeting, but a handshake can also be used in meetings.

Name Cards/Business Cards
- “Meishi” (business cards) are exchanged when meeting someone for the first time, preferably with one side translated into Japanese. They should be given and accepted with both hands in formal situations, in a way that allows the recipient to read it. Traditionally, meishi should be kept in a business card case, not in the plastic cases they were delivered in, your pocket or your wallet.
- When receiving a meishi, you should make sure to read your counterpart’s name on it, and then only place it on the table in front of you if you are sitting.
- Although “meishi” are entered into some form of database, they are also stored carefully and will be referred to later for further contacts.
- Not to have any “meishi” gives the impression of being unemployed (this is not specific to Japan alone, as “meishi” are important in most East Asian countries) so it is important not to forget them.

Meetings & business etiquette
- There is a seating protocol that depends on seniority, guest/host relationship, the position of the door, and decorations in the room.
- As a guest, you should wait for the host and highest-ranked person to sit down to take a seat yourself. It is the same when leaving. A higher status person sits closer to the highest-ranking host.
- Meetings can be held in offices or sometimes restaurants. Usually drinks are handed out at the start of the meeting. They will be handed out in order of rank. Wait for the most senior person to drink theirs first.
- Titles are very important and it is best to address people directly by using their professional title or their title and surname.
- Decisions come from the top down, but a consensus is expected at every level, so it might be a slightly longer process. After signing a contract, thank everyone as they will all have contributed.

Hospitality Etiquette
- An invitation to lunch or dinner is an important feature of the Japanese business culture, and can even be a sign of trust.
- You should never invite them at the first meeting. The host always pays, in accordance with Japanese business protocol.
- Sometimes they will invite you to a late social gathering. Always arrive on time at the agreed place in such an occasion.
- Your host will generally order for you but if you are familiar with Japanese dishes, you can also let your host know what you like. It is always good to show your appreciation during the meal.
4.2 Travel trade: Japanese holidays

National public holidays

<table>
<thead>
<tr>
<th>Date in 2022</th>
<th>National Holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st January</td>
<td>New Year’s Day, Gantan</td>
</tr>
<tr>
<td>11th January</td>
<td>Coming-of-age Day, Seijin no Hi</td>
</tr>
<tr>
<td>11th February</td>
<td>National Foundation Day</td>
</tr>
<tr>
<td>23rd February</td>
<td>Emperor’s Birthday</td>
</tr>
<tr>
<td>20th March</td>
<td>Vernal/Spring Equinox Day, Shunbun no Hi</td>
</tr>
<tr>
<td>29th April</td>
<td>Showa Day, Showa no Hi</td>
</tr>
<tr>
<td>3rd May</td>
<td>Constitution Memorial Day</td>
</tr>
<tr>
<td>4th May</td>
<td>Greenery Day, Midori no Hi</td>
</tr>
<tr>
<td>5th May</td>
<td>Children’s Day, Kodomo no Hi</td>
</tr>
<tr>
<td>22nd July</td>
<td>Marine Day, Umi no Hi</td>
</tr>
<tr>
<td>23rd July</td>
<td>Sports Day</td>
</tr>
<tr>
<td>9th August</td>
<td>Mountain Day, Yama no Hi</td>
</tr>
<tr>
<td>20th September</td>
<td>Respect for Aged Day, Keiro no Hi</td>
</tr>
<tr>
<td>23rd September</td>
<td>Autumnal Equinox Day</td>
</tr>
<tr>
<td>3rd November</td>
<td>Culture Day, Bunka no Hi</td>
</tr>
<tr>
<td>23rd November</td>
<td>Labour Thanksgiving Day, Kinro Kansha no Hi</td>
</tr>
</tbody>
</table>

- There are usually 16 national public holidays in Japan.
- Since 2000 the Happy Monday system has ensured that some national holidays happen on a Monday every year so that the Japanese people get a long weekend. If some of the holidays happen on a Sunday, they will be observed on the next Monday instead of the original day too.
- Japanese people get around 10 days of paid annual leave when they start working, but as they will get more seniority in their company, they can get up to 20 days (after 6.5 years). It is not unusual for people not to use all their days off during the year, and they can legally use the remaining leave the next year.
- In Japan, academic years run from April to March. When divided in semesters, classes run from April to September, and then from October to March. There are usually three long holiday periods a year:
  - Summer break: late July – late August,
  - Winter break: late December – early January,
  - Spring break: late February – early April.

Source: Officeholidays.com
4.2 Caring for the consumer: understanding culture and etiquette

Uchi-soto - Us and them
• Japan has preserved many ancient traditions and customs to the present day.
• The Japanese society traditionally tends to be organised around the group, rather than the individual. So there might be differences between dealing with an individual or a group. When addressing a group, you have to address the group’s interests more than the individuals’ concerns.
• For that reason, your Japanese interlocutor might take more time to adopt something new: they usually consult with others in their group to take a consensual decision across all stakeholders.

Honne and Tatemae
• Maintaining the group’s harmony is extremely important in Japan. Using diplomatic language is usually preferred.
• In formal situations a direct “No” is to be avoided, and softer alternatives should be used instead.
• As Japanese tend to be very polite, if the meaning is not clear enough, it is perfectly acceptable to ask for clarification in a respectful way.

Expectations
• The Japanese will travel over 7,000 miles to visit Britain. As a consequence they are usually looking for authentic British experiences and unique sites.
• They pay attention to detail and will like a service that does so too. They appreciate and notice small touches so your offer should take into account Japanese cultural differences and preferences.
• Make sure you understand their culture, and particularly the nuances in their language that convey respect to your interlocutors and visitors. Employing the right words also help convey promotional messages more efficiently and will help communication with Japanese guests.

Interaction
• Attentive and polite service is very important for this market. The Japanese notion of kizukai is about caring about another person’s needs before that person has to expressly say something about it. They would expect the staff to be ready to attend any problems proactively.
• Apologising for a problem (which is different from accepting liability) can take you a long way.
• Japanese customers might refrain from giving you direct feedback but they will often be more open with their tour guide, which can help you get insights on their needs.
4.2 Caring for the consumer: understanding culture and etiquette

Do’s and Don’ts

• Be aware of personal space – in Japan the traditional form of greeting is a bow. Shaking hands is also widely used now.
• Politeness and respect are important. Walk your guest to the door when they leave, and try not to be late for anything.
• Blowing your nose in front of someone is considered to be rude so it is best to turn around. Use a tissue, not a handkerchief.
• Sarcasm is not appropriate for any situation and is considered rude.
• When meeting your Japanese counterparts at meal times, do not stick your chopsticks into your rice and leave it standing or exchange food from chopstick to chopstick as these are both involved in rituals for the deceased.

Safety

• Health and safety are prime concerns in Japan.
• For that reason masks are often worn in public transports and outdoors. Many public places – like hotels, supermarkets and offices – have started to leave hand-sanitizers in their lobbies for guests who would like to cleanse their hands upon arrival. Similar facilities in the place they visit or stay at abroad will be appreciated.

Service-related tips and useful information

• Japanese are discerning customers and the level of service in every domestic sector has set the bar high.
• In Japan the customer is considered to be *kamisama*, or “God”. Japanese consumers expect an authentic and high level of attention to detail and care.
• They may place their complaints to their tour organiser rather than the service provider, or just not recommend it to their friends and family, assuming poor service quality is the provider’s standard. This can be damaging as word of mouth factors very highly in the consumer decision making process.
• The Japanese do not tip in Japan and therefore may not be familiar with the British custom of tipping.
4.2 Caring for the consumer: hospitality

Accommodation

- Leisure travellers generally prefer to stay in 3-star or even higher categories of hotels. Japanese women (in their 20s and 30s) might prefer to stay in greater luxury - 4 or 5 star hotels – whereas students prefer budget accommodation.
- Groups will prefer to all have the same room type as standardisation is important. They will also appreciate having access to express check-in options.
- Japanese package tour brochures will very often feature the exact layout of a room in the tour brochure.
- Japanese couples usually prefer twin beds to double ones, and bedrooms with baths, instead of showers.

Food and drink

- Meal times tend to be similar to those in Britain. Fast service, breakfast buffets, set-meal lunches and express check-in for groups are preferred. However, eating and drinking in the street is impolite in Japan, so Japanese visitors will not like eating on the run. They will wait for their host to be ready before they start eating their food.
- Before the meal they say “Itadakimasu”, and “Gochisosama deshita” when they finish it. “Kampai” means “cheers” and is used before drinking.
- The Japanese are well-known gourmet eaters, but they are not overly fussy either. Presentation is important (a whole meal on one plate or big portions are avoided), but good cuisine is often seen as revealing the flavours of good ingredients. Cooking with local and in-season products is becoming a part of their healthy lifestyle.
- Traditional Japanese meals are often fish-based and will include cooked (mostly boiled) vegetables or pickles and soup. Small, light, fresh meals are preferred.
- The Japanese drink (green) tea, either cold in summer or hot in winter, which can replace water during meals.
- They also enjoy English tea and having tea in Britain will be one of their trip’s highlights. Recent research show that many associate Britain with whisky, and would be interested in trying Britain’s fish and seafood.

Source: VB/DEFRA’s “Food is GREAT"
4.2 Caring for the consumer

Language

- Japanese (prominent dialects include Osaka, Kyoto, Tohoku, Kyushu, Okinawa). It is based on both Chinese characters (kanji), the syllabic kana, and katakana (a phonetic alphabet for foreign words and names).
- The Japanese language, although quite simple to pronounce and speak, can appear difficult because of the codified layers of respect and humility that are used, depending on to whom you are talking. There are different words depending whether you are talking to an older, younger or similarly aged person. Using those forms of respect will be highly appreciated, as is providing information in Japanese. Over half of the Japanese leisure visitors in Britain felt that their expectations in terms of information and signs in their language were not met (51% vs 39% for the average visitor to Britain).
- It is also important to note that there are different words translating “Britain” in Japanese. The word you use will influence perceptions of “Britain”: “Eikoku” carries an active feel and effectively conveys traditional themes, while “Igirisu” is more of a contemporary expression and a modern nuance. Eikoku is written in kanji whilst Igirisu is written in katakana, which also visually sets them apart as traditional and contemporary.
Useful links and further information

Appendix
Appendix 1: Working with VisitBritain (1)

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or partnering to host journalists, influencers, and broadcast shoots
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Retailing your product through the VisitBritain shop
- Joining the Tourism Exchange GB platform – giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.
- Or as a major campaign partner

We are here to support you and look forward to working with you. To find out more browse our:

- [Opportunity search](#) or [trade website](#)

or contact the B2B events team
(Email: [events@visitbritain.org](mailto:events@visitbritain.org))
or campaign partnerships team
(Email: [partnerships@visitbritain.org](mailto:partnerships@visitbritain.org))
or trade support team
(Email: [tradesupport@visitbritain.org](mailto:tradesupport@visitbritain.org))
or VisitBritain shop team
(Email: [product@visitbritain.org](mailto:product@visitbritain.org))
VisitBritain’s strategy to grow tourism to 2025

• Developing world-class English tourism product: VisitBritain has collaborated with VisitEngland to develop and deliver the Discover England Fund since April 2016.

• Collaborating globally: VisitBritain’s network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain’s different trade events, VIBE, ExploreGB, or Destination Britain events in market.

• Inspiring the world to explore Britain as a GREAT Britain campaign partner and through our ‘I Travel For…’ marketing campaign.

• Acting as trusted partner and advisor to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund. Find out more at our Discover England Fund page.

To find out more information, browse:

VisitBritain’s mission
The Government’s Tourism Action Plan
VisitBritain’s events
Business Recovery Webinars
Appendix 1: Working with VisitBritain (3)

VisitBritain’s global audience segments

- From 2017, VisitBritain has carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers’ market. On the right is a summary of VisitBritain’s 5 global audience segments. To learn more visit our page on understanding our customers.

- In Japan, VisitBritain focuses on two segments of international travellers:
  - **Buzzseekers in Japan**: looking for fast paced and exciting trips which are a mix of famous sites and new experiences.
  - **Culture Buffs in Japan**: image conscious travellers who prefer holidays at a slower pace, focussed on iconic sites.

<table>
<thead>
<tr>
<th>Segments (&amp; global attributes)</th>
<th>Market share Japan</th>
<th>Global market share</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Buzzseekers</strong> (free spirited and spontaneous, they like holidays full of action and excitement)</td>
<td>22%</td>
<td>38%</td>
</tr>
<tr>
<td><strong>Explorers</strong> (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)</td>
<td>17%</td>
<td>23%</td>
</tr>
<tr>
<td><strong>Adventurers</strong> (they live to go off the beaten track, spending time outdoors and trying out new experiences)</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td><strong>Sightseers</strong> (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Culture Buffs</strong> (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)</td>
<td>30%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/Kubi Kalloo, 2017
Appendix 2: Useful research resources (1)

We have dedicated research and insights available which include:

- Latest *monthly*, *quarterly*, *overall* and *quarterly by area* data from the International Passenger Survey by ONS.
- **Inbound Tourism Trends by Market**
- **Inbound activity data**
- **Inbound nation, region and country data**
- **Inbound town data**
- **Sector-specific research** which includes topics such as accommodation, countryside and coast, culture heritage and attractions, food and drink, football tourism, shopping, transport and visits with a health condition or impairment.
- **2022 Inbound Tourism Forecast**
- **Britain’s competitiveness**

We are here to support you and look forward to working with you.

To find out more about Japan or other inbound markets browse our:
- **Markets & segments**
- **Inbound research & insights**
- **Inbound COVID-19 sentiment tracker**

Or contact us directly
(Email: research@visitbritain.org)
Appendix 2: Useful research resources (2)

We have dedicated research and insights available which include:

• Perceptions of Britain overseas
• Planning, decision-making and booking cycle of international leisure visitors to Britain
• Gateways in England, insights on overseas visitors to England’s regions, participation in leisure activities, multi-destination trips and more
• Food & drink research

We are here to support you and look forward to working with you.

To find out more about Japan or other inbound markets browse our:
Markets & segments
Inbound research & insights
Inbound COVID-19 sentiment tracker

Or contact us directly
(Email: research@visitbritain.org)
Details on main sources:

- The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more and consult the release calendar, browse our [IPS page](#).

- **Oxford Economics** tourism forecasts are from the October 2021 update of the ‘Global Travel Service’ databank.

- **Apex** data was last updated with January 2022 data.

- **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, September 2021.

- **VisitBritain/IPSOS 2016** refers to the ‘**Decisions & Influences’ research project** carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.

- The **Anholt Nation Brands Index** (NBI), now powered by Ipsos, was carried out online in July-August 2021 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples. More detail in our ‘**How the world views the UK’ foresight**.
Appendix 3: Definitions, sources and information on this report (2)

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** journey purpose means Miscellaneous – other journey purposes.
- In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.
- **High Net Worth Individuals**, or HNWIs, are people with liquid assets valued over USD1million.

Other useful information

- **Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2007 and 2019. Where an activity was asked about more than once, only the most recent answers were taken into account.
- **Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market’s propensity to visit Britain repeatedly. IPS question asked in 2015.
- **Likelihood to recommend Britain** as a destination is based on holiday visits, of at least one night, excluding British expats.
Market and Trade Profile: Japan
January 2022